Comprehensive Economic Development Strategy (CEDS)
for the Tri County Council for Western Maryland
Economic Development District
Garrett County
 Allegany County
 Washington County

CEDS Staff Members
Leanne Mazer
Guy Winterberg
Darlene Steyer
Ryan Davis
Amy Jacobs
Christie Wakefield

Strategy Committee Members
Roger Fairbourn, Chair
Bill Atkinson, Appalachian Regional Commission
John Barr, Washington County Board of County Commissioners
Susan Buchanan, Washington County Office of Community Grant Management
Jeremy G. Irons, Carl Belt, Inc.
Karen Johnson, Western Maryland Health System
Jonathan Kessler, Smileys Fun Zone
Jeff McKenzie, Landis Office Center
Jack Miller, Washington County
Matt Miller, Cumberland Economic Development Corporation
David Nedved, Allegany County Department of Community & Economic Development
Steve MacGray, Perry Wellington Realty
Stephen Nelson, Nelson Marketing Solutions
Cindy Sharon, Garrett County Office of Economic Development
Robert Smith, Allegany Aggregates
Spencer Schloshnagle, Town of Friendsville
Elizabeth Stahlman, City of Frostburg
William Valentine, Allegany County Board of County Commissioners
Table of Contents

Introduction 1
Summary of Existing Conditions and Background 2
Online Survey 10
SWOT Analysis 15
Identification of Tier 1-3 Initiatives 16
General Plan of Action 18
   Promoting Development
   Fostering Effective Transportation Access
   Enhance and Protect the Environment
   Workforce
   Promote Technology
   Obtaining and Utilizing Funds
Strategic Direction/Action Plan 20
   Strategic Initiative 1 – Strategic Initiative 5
Economic Resilience 26
   Planning for and Implementing Resilience
   Establishing Information Networks
   Pre-Disaster Recovery
   Measuring Resilience
   Brief Economic Facts by County
Performance Measures 43
Prioritized List of Projects FY19 44
Strategic Goals and Objectives 47
Sources 51

MISSION
To provide a forum for local governments and citizens throughout Western Maryland to identify the issues and opportunities that are facing the region.

VISION
To improve the overall quality of life in the region by efficiently utilizing public and private resources to fund projects throughout the region.

Tri County Council for Western Maryland, Inc. (TCCWMD) is a local Development District serving a three-county region in Appalachian Maryland.

TCCWMD is owned by its member governments of Allegany, Garrett and Washington Counties and has provided economic and community development assistance to its partners since its inception in 1971.

TCCWMD encourages and facilitates government cooperation by addressing issues of greater than local significance on a regional basis.
Comprehensive Economic Development Strategy  
2018-2022  
for the  
Tri-County Council for Western Maryland Economic Development District  
Garrett, Allegany and Washington Counties  

INTRODUCTION  

Tri-County Council for Western Maryland is designated by the US Department of Commerce Economic Development Administration as the Economic Development District (EDD) and regional planning organization. The region is comprised of the panhandle of Western Maryland and includes Garrett, Allegany and Washington Counties and their twenty-four municipalities. The Comprehensive Economic Development Strategy was updated over the course of the last year and continues to serve as the five-year plan for the period from 2018-2022.  

The Council was formed in 1971 and has been supported by Appalachian Regional Commission (ARC), Economic Development Administration (EDA), and the State of Maryland, in cooperation with local governments, to provide a forum for regional discussions which directly support the formulation and implementation of economic development programs. These economic development programs are designed to create or retain full-time permanent jobs and improve income characteristics, particularly for the unemployed and under-employed citizens of the region.  

The organization is governed by a Board of Directors that is comprised of individuals from all three counties including elected officials from each area. TCCWMD offers a wide variety of services including Revolving Loan Funds, grant assistance, GIS assistance, education coordination, regional strategy building, regional planning, operation of a state data center, and planning assistance in cooperation with the Maryland Department of Planning. The Council also serves as a conduit to federal programs including the Appalachian Regional Commission and the Economic Development Administration.  

The work program of the organization is specifically designed to enhance the quality of economic development activities in the region, strengthen relationships among the various units of local government, and enhance public awareness. This strategy is achieved by the delivery of quality economic development activities and products in a timely manner and by coordinating the goals, objectives, and programs of Tri-County Council with other public and private agencies in Western Maryland.  

The Comprehensive Economic Development Strategy Committee serves as regional convener for ideas and suggestions to mold the CEDS document into a truly regional economic development plan. The Committee aids in the development of short and long term projects, the development of surveys and the assessment of the region. The Strategies Committee meets as needed to review the document and makes recommendations to the full TCCWMD Board of Directors.
Appalachian Maryland is not that different from the majority of Appalachia. Like any rural area we are full of tight knit communities and a quality of life that cannot be matched for many of us. The majority of the landscape is full of natural beauty made up of endless forests and countless streams which draw people from around the region.

The region was once a leading area of manufacturing for the state and to this day continues to thrive on its manufacturing base. Companies have long recognized the area for its skilled labor, reliable workforce and educational institutions. More recently the area has diversified as large scale industry has changed strategies to smaller more regional based facilities. Advanced manufacturing which is considered a blend of traditional manufacturing and technology now plays a very important role in the region. As technology continues to improve the industrial processes, the manufactures that call Western Maryland home have adapted and become more efficient. New companies moving into the area are considerably more driven by aspects of technology that allow them to compete in a global economy.

Over the years, several manufacturing companies in the region employed 1,500 or more people. Most of those companies are no longer here, and new plants of this size are few and far between. This decline in large manufacturing plants forced the region to diversify and they have grown because of that effort.

Manufacturing is still a major part of the workforce today, but large companies today employ 300-400 people instead of 1,500, and a plant closing does not devastate the region as it once did. Other major industries of the past such as mining and agriculture are being supplemented with new and emerging tourism efforts, information technology, cyber-security, autonomous technology, biotechnology, the sustainable energy industry and related businesses.

An essential component of the region’s economic development strategy is improving access for local businesses to, not only regional, but also global markets. Broadband development that can carry information, voice and data, reasonably priced, is part of the region’s strategic initiatives. Western Maryland has critical final links that need to be completed to attract and retain businesses. The benefits of broadband connectivity are not being fully realized by the overall region.

Unemployment rates rose with the Great Recession and have slowly come back down, both in the Western Maryland Region and for the state as a whole. However, before, during, and after the Great Recession, Western Maryland unemployment rates remained stubbornly higher than statewide averages. The Western Maryland Region was hit harder than the state in general from the Great Recession with unemployment rates rising 4.9 percentage points (from 4.6% to 9.4% between 2007 and 2010), compared to a 4.2 percentage point increase for the state as a whole (3.5% to 7.7% for the same period).

Both the Region and the State are slowly recovering from the Great Recession. However, while unemployment rates have come down throughout the state, the unemployment rate for the Western Maryland region (5.2%) remains higher than the state rate (4.5%) as well as slightly above the national average (4.0%) through the first seven months of 2018. Maryland’s growth rates since the end of the Great Recession have lagged most states; however, the State is in a better position than a majority of others. For 2015, Maryland ranked 26 out of 38 states which were now above their pre-recession job peak totals with 2.0% above the 2007 pre-recession peak.
Demographic History

1. Population

The population of the Western Maryland Region has grown in every decade up to and including the 2000 to 2010 period. (See Chart 1.) However, because this Region has grown more slowly than the rest of Maryland for decades, its share of the statewide population has been steadily declining since peaking in 1920 at 10.2 percent, falling to an estimated 4.2 percent by July 2017. (See Chart 2.)
While the total numeric gain of the Region during the 2000 to 2010 period of 16,138 was the largest since the 1920s, two trends are evident when looking at the data annually through that decade as well as the post census annual estimates through 2017. The first is the majority of all growth in the Western Maryland Region occurred in Washington County. Sixty percent of the region’s population resides in Washington County as of June 2017 estimates. The second is that there was a fundamental change in this Region’s growth path that roughly corresponds to before and after the Great Recession and which continues through today. Table 1 illustrates the annual population estimates for the Region and the three counties from 2000 to 2017. The dominance of growth in Washington County is evident, growth for that County during the 2000 to 2007 period averaged 2,017 residents per year. Since that time, during the 2008 to 2017 period, the County demonstrates an average gain of 385 residents per year; the last two years indicate slight, steady increases.

Table 1. Total Population Estimates, 2000 through 2017

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>MARYLAND</td>
<td>5,311,034</td>
<td>5,374,691</td>
<td>5,440,389</td>
<td>5,496,269</td>
<td>5,546,935</td>
<td>5,592,379</td>
<td>5,627,367</td>
<td>5,653,408</td>
<td>5,684,965</td>
<td>5,730,388</td>
<td>5,788,099</td>
<td>5,843,115</td>
<td>5,891,680</td>
<td>5,932,654</td>
<td>5,970,245</td>
<td>6,000,561</td>
<td>6,024,752</td>
<td>6,052,177</td>
</tr>
<tr>
<td>WESTERN MARYLAND REGION</td>
<td>236,693</td>
<td>237,410</td>
<td>239,022</td>
<td>241,130</td>
<td>243,978</td>
<td>246,146</td>
<td>248,413</td>
<td>250,770</td>
<td>251,534</td>
<td>252,199</td>
<td>252,831</td>
<td>252,831</td>
<td>252,973</td>
<td>252,603</td>
<td>251,777</td>
<td>251,112</td>
<td>251,348</td>
<td>251,426</td>
</tr>
<tr>
<td>Allegany County</td>
<td>74,804</td>
<td>74,525</td>
<td>74,204</td>
<td>74,076</td>
<td>74,408</td>
<td>73,979</td>
<td>73,980</td>
<td>74,449</td>
<td>74,638</td>
<td>75,101</td>
<td>74,977</td>
<td>74,977</td>
<td>73,962</td>
<td>73,604</td>
<td>73,045</td>
<td>72,498</td>
<td>72,194</td>
<td>71,615</td>
</tr>
<tr>
<td>Washington County</td>
<td>132,051</td>
<td>133,093</td>
<td>134,831</td>
<td>136,872</td>
<td>139,423</td>
<td>142,084</td>
<td>144,286</td>
<td>146,173</td>
<td>146,674</td>
<td>146,953</td>
<td>147,724</td>
<td>147,724</td>
<td>149,057</td>
<td>149,045</td>
<td>149,097</td>
<td>149,198</td>
<td>149,810</td>
<td>150,728</td>
</tr>
<tr>
<td>II. Change in population</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MARYLAND</td>
<td>63,657</td>
<td>66,906</td>
<td>55,580</td>
<td>50,666</td>
<td>45,444</td>
<td>34,968</td>
<td>26,041</td>
<td>31,557</td>
<td>45,423</td>
<td>51,711</td>
<td>55,016</td>
<td>48,565</td>
<td>40,914</td>
<td>37,591</td>
<td>30,316</td>
<td>24,191</td>
<td>27,425</td>
<td></td>
</tr>
<tr>
<td>WESTERN MARYLAND REGION</td>
<td>737</td>
<td>1,592</td>
<td>2,108</td>
<td>2,848</td>
<td>2,168</td>
<td>2,267</td>
<td>2,357</td>
<td>2,577</td>
<td>2,656</td>
<td>2,632</td>
<td>2,646</td>
<td>2,646</td>
<td>2,630</td>
<td>2,624</td>
<td>2,610</td>
<td>2,650</td>
<td>2,700</td>
<td></td>
</tr>
<tr>
<td>Garrett County</td>
<td>-26</td>
<td>175</td>
<td>195</td>
<td>-35</td>
<td>-64</td>
<td>64</td>
<td>1</td>
<td>74</td>
<td>-77</td>
<td>-15</td>
<td>1</td>
<td>-183</td>
<td>0</td>
<td>-319</td>
<td>-219</td>
<td>-72</td>
<td>-111</td>
<td></td>
</tr>
<tr>
<td>Washington County</td>
<td>1,042</td>
<td>1,738</td>
<td>2,041</td>
<td>2,551</td>
<td>2,661</td>
<td>2,202</td>
<td>1,887</td>
<td>501</td>
<td>279</td>
<td>771</td>
<td>1,031</td>
<td>302</td>
<td>-12</td>
<td>52</td>
<td>101</td>
<td>612</td>
<td>768</td>
<td></td>
</tr>
</tbody>
</table>

Change in Western MD Region as a Pct of MD Pop Change 1.2% 2.4% 3.8% 5.6% 4.8% 6.5% 9.1% 2.4% 1.5% 1.1% 1.2% 1.0% 0.9% -2.2% -0.6% 1.0% -0.3%

Prepared by the Maryland Department of Planning from U.S. Census Bureau population estimates, March 2018

Washington County had substantial growth through 2007 and did not experience the outmigration of Allegany and Garrett counties. In comparison, for Allegany County and Garrett County there has been a net loss for both counties for the period 2000 to 2017. While Allegany County and Garrett County have experienced population declines since 2010; the entire Western Maryland region has experienced a loss in population since 2010. According to June 2017 population estimates, a slight 0.3% decrease is recorded.
The slowdown in the growth in Washington County can be tied directly to the effects of the Great Recession on the migration pattern of residents in Maryland (as well as other states).

During the first part of the last decade, when the “housing bubble” was inflating and housing prices were rising rapidly, people were moving further out into the exurban, or “third tier” of suburbs in order to purchase homes that were more affordable. This particularly impacted Washington County which had an influx of residents from Frederick County, and to a lesser extent from Montgomery County, boosting its population growth. When the housing price bubble collapsed and the Great Recession took hold leading to significant job losses, the desire or even the means to move were no longer there. Both the buying and selling of homes became more difficult as mortgage lending standards were significantly tightened, and with the loss of jobs, many could no longer afford to buy a home anyway. Chart 3 shows the estimated annual net domestic migration for the Western Maryland Region over the past seventeen-year period. From strong net inflows through 2007 (almost all of which went to Washington County), the Region has experienced net domestic outmigration in seven out of the last ten years.

![Chart 3. Net Domestic Migration for Western Maryland](image)
2. Income

Median household income for the Western Maryland Region has been and remains significantly below statewide figures. In the 2012 to 2016 period (latest available for all counties) the median household income for the Western Maryland Region ($48,051) was nearly two-thirds (63.2%) of the statewide median ($76,067). (See Table 2) However, there is also a large difference within the Western Maryland Region, with the median income of Washington County ($56,316) significantly above that of Allegany ($41,559) and Garrett ($46,277) counties. The median incomes of the latter two counties are on the order of 54 to 61 percent of the statewide median while Washington County’s median is at three-quarters of the state.

Table 2. Median Household Income (in constant $2016 dollars)

<table>
<thead>
<tr>
<th>County</th>
<th>2012-2016</th>
<th>1999</th>
<th>Change</th>
<th>Percent</th>
<th>2012-2016</th>
<th>1999</th>
<th>Change</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maryland</td>
<td>$76,067</td>
<td>$73,911</td>
<td>$2,156</td>
<td>2.8%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Western Maryland</td>
<td>$48,051</td>
<td>$48,314</td>
<td>-$263</td>
<td>-0.5%</td>
<td>63.2%</td>
<td>65.4%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allegany</td>
<td>$41,559</td>
<td>$43,089</td>
<td>-$1,530</td>
<td>-3.7%</td>
<td>54.6%</td>
<td>58.3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Garrett</td>
<td>$46,277</td>
<td>$45,070</td>
<td>$1,207</td>
<td>2.6%</td>
<td>60.8%</td>
<td>61.0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Washington</td>
<td>$56,316</td>
<td>$56,784</td>
<td>-$468</td>
<td>-0.8%</td>
<td>74.0%</td>
<td>76.8%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Prepared from U.S. Census Bureau, 2000 Census FactFinder data

The change in median household income since 1999 has taken a bit longer in the Western Maryland Region compared to the state as a whole. Adjusted for inflation, Maryland’s median household income increased by 2.8 percent between 1999 and the 2012 to 2016 period. The decline for the Western Maryland Region continued although with improvement from (-1.9%) to (-0.5%). Allegany County remains below the state average and under its 1999 income figures, yet its data indicates the greatest increase among the region from (-6.3%) (-$2,538 change) in 2015 to (-3.7%) (-$1,530 change) in 2016. Washington County has increased slightly from (-1.0%) (-$556 change) in 2015 to (-0.8%) (-$468 change) in 2016. Median household income in Garrett County represents an improvement over 1999 by (2.6%) ($1207 change) in 2016. This is an increase over 2015 data of (0.8%) ($362 change). (See Table 2)

The Great Recession and the subsequent slow recovery since that time has had significant effects on median household income in Maryland. For the state as a whole, median household income peaked in 2007 at $77,728, a rise of 4.9% from 1999 levels. Between 2007 and 2016 income has slowly improved to a $1,661 (-2.1%) difference. As a result, Western Maryland’s median income in 2016 was just below the 1999 level.

It has been the more rural counties or previously fast growing outlying suburban counties that were hit hardest by the Great Recession and the housing bust and which show the greatest percentage of increase when compared to peak incomes and 2016.
3. Unemployment

Unemployment rates rose with the Great Recession and have slowly come back down, both in the Western Maryland Region and for the state as a whole. However, both before, during, and after the Great Recession, Western Maryland unemployment rates remained stubbornly higher than statewide averages. The Western Maryland Region was hit harder than the state in general from the Great Recession with unemployment rates rising 4.8 percentage points (from 4.6% to 9.4% between 2007 and 2010), compared to a 4.2 percentage point increase for the state as a whole (3.5% to 7.7% for the same period). While unemployment rates have come down throughout the state, the unemployment rate for the Western Maryland region remains higher than the state rate (4.5%) as well as above the national average (4.0%) through June 2018* at 5.2%. (See Table 3)

Maryland unemployment rates now stand at pre-recession rates; the last time Maryland saw similar unemployment rates was in 2008. As the State and Western Maryland region slowly rebound, the number of unemployed statewide has decreased by 43,343 since 2014. Of that decrease (481) 1.1% can be attributed to Allegany County, (271) 0.6% to Garrett County, and (1,228) 2.8% to Washington County.

Table 3. Annualized Unemployment Rates

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Maryland</td>
<td>3.5%</td>
<td>4.2%</td>
<td>7.0%</td>
<td>7.7%</td>
<td>7.2%</td>
<td>7.0%</td>
<td>6.6%</td>
<td>5.8%</td>
<td>5.1%</td>
<td>4.3%</td>
<td>3.8%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Western Maryland Region</td>
<td>4.6%</td>
<td>5.5%</td>
<td>9.1%</td>
<td>9.4%</td>
<td>8.8%</td>
<td>8.3%</td>
<td>8.0%</td>
<td>7.1%</td>
<td>6.3%</td>
<td>5.5%</td>
<td>5.0%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Allegany County</td>
<td>5.1%</td>
<td>5.7%</td>
<td>8.5%</td>
<td>9.3%</td>
<td>9.1%</td>
<td>8.9%</td>
<td>8.5%</td>
<td>7.6%</td>
<td>7.0%</td>
<td>6.1%</td>
<td>5.5%</td>
<td>6.1%</td>
</tr>
<tr>
<td>Garrett County</td>
<td>4.4%</td>
<td>4.8%</td>
<td>7.8%</td>
<td>8.9%</td>
<td>8.4%</td>
<td>8.3%</td>
<td>8.1%</td>
<td>7.1%</td>
<td>6.3%</td>
<td>5.5%</td>
<td>5.3%</td>
<td>4.9%</td>
</tr>
<tr>
<td>Washington County</td>
<td>4.3%</td>
<td>5.5%</td>
<td>9.7%</td>
<td>9.6%</td>
<td>8.8%</td>
<td>7.8%</td>
<td>7.4%</td>
<td>6.5%</td>
<td>5.6%</td>
<td>4.9%</td>
<td>4.2%</td>
<td>4.7%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Western Maryland Region</td>
<td>1.1%</td>
<td>1.2%</td>
<td>2.1%</td>
<td>1.8%</td>
<td>1.6%</td>
<td>1.3%</td>
<td>1.4%</td>
<td>1.3%</td>
<td>1.2%</td>
<td>1.2%</td>
<td>0.7%</td>
<td>0.7%</td>
</tr>
<tr>
<td>Allegany County</td>
<td>1.6%</td>
<td>1.4%</td>
<td>1.5%</td>
<td>1.7%</td>
<td>1.9%</td>
<td>1.9%</td>
<td>1.8%</td>
<td>1.9%</td>
<td>1.8%</td>
<td>1.8%</td>
<td>1.3%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Garrett County</td>
<td>0.9%</td>
<td>0.6%</td>
<td>0.8%</td>
<td>1.2%</td>
<td>1.2%</td>
<td>1.3%</td>
<td>1.5%</td>
<td>1.3%</td>
<td>1.2%</td>
<td>1.2%</td>
<td>0.3%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Washington County</td>
<td>0.9%</td>
<td>1.3%</td>
<td>2.7%</td>
<td>1.9%</td>
<td>1.6%</td>
<td>0.8%</td>
<td>0.8%</td>
<td>0.7%</td>
<td>0.5%</td>
<td>0.6%</td>
<td>0.4%</td>
<td>0.2%</td>
</tr>
</tbody>
</table>

Prepared from [www.dllr.state.md.us/lmi/laus data](http://www.dllr.state.md.us/lmi/laus data)
4. Economy

Despite a declining population share and higher unemployment rates, the Western Maryland Region seems to be holding its own in terms of job growth. While both the Region and the state were severely hurt by the Great Recession, both are slowly recovering. In fact, the Western Maryland Region’s share of statewide payroll employment has stabilized at around 4.3% of total payroll employment in the state over the last five years. (See Chart 4) This share is, of course, below historical levels. Back in 1969 (earliest data available), the Western Maryland Region made up 5.2% of statewide payroll employment. The low point was in 1986 when its share was 4.1%.

Recovery from the Great Recession has varied across the U. S. Sixteen states have not recovered their lost jobs. Maryland is in better position than most states, but below national recovery. Population and income growth in jobs is uneven within the Western Maryland Region. The bulk of the long-term growth in jobs is almost entirely due to gains in Washington County. (See Chart 5)

While 2015 and 2016 data indicates small gains for Allegany County, it continues to suffer job losses. The pre-recession peak of 32,885 payroll jobs in 2006 has not been recovered. Total jobs in 2016 are 1,327 (-4.2%) below its peak. Garrett County has shown steady small gains with payroll jobs in 2016 just 33 (-0.3%) below its 2006 peak. Washington County payroll jobs grew above its pre-recession peak in 2013. Total jobs in 2016 are 643 (0.9%) above 2006 data. (See Table 4)
The U.S. Bureau of Economic Analysis (BEA) total jobs numbers include both Wage and Salary (payroll jobs sector) and Self Employed (proprietor sector). Table 4 represents the payroll jobs sector in Garrett, Allegany, and Washington counties. Over time, the proprietor sector has increased to a larger share of total jobs. Chart 7 demonstrates an example of the number of proprietor (self-employed) business establishments in the region per county. The U.S. Census Bureau data for percentage of employed residents who work in their own county (Chart 6) includes the self-employed. BEA data indicated that by 2014, the proprietor sector represented more than one out of five jobs in Maryland.5

Maryland reported 1.5% increase in jobs in 2015, growing above its pre-recession peak; and 1.3% increase in 2016. The Western Maryland region reported job growth in 2015 for Garrett, Allegany, and Washington counties with gains over 2014 totals. The region remains only 717 (-0.6%) below its pre-recession payroll job totals.
Online Survey

The Comprehensive Economic Development Strategy (CEDS) is a strategy-driven plan for regional economic development. The CEDS will serve as the fundamental plan for Tri-County Council for Western Maryland’s economic development efforts for the communities it serves for the next five years. These economic development programs create or retain full-time permanent jobs and improve income characteristics, particularly for the unemployed and under-employed citizens of the region. Established by local representatives from public, private and non-profit sectors of the three Western Maryland counties, the document follows the CEDS Content Guidelines released by the Economic Development Administration (EDA) in 2016.

As part of this process, CEDS committee members developed a brief online survey. The survey was distributed throughout the three county region and assessed the views of community members on the opportunities and threats associated with the region’s economic growth and development. The Council invited the regional community to have strong and substantive input in the process. Specifically, TCCWMD encouraged the region to guide its economic development efforts by helping to prioritize issues that affect Western Maryland.

The Survey results, along with the SWOT analysis, were considered when developing the initiatives, goals and objectives, and action plan for the CEDS next five-year plan 2018-2022.

Online Survey:
Following recommendation by the CEDS Committee and approval by the TCCWMD board of directors, the Survey launched to the region on Thursday, June 22, 2017. The initial release included the TCCWMD membership, newsletter databases, chambers of commerce, offices of economic development, community partners identified by the committee as well as the media. The launch was followed by an email and social media outreach.

Community partners included civic organizations, education institutions, and municipalities. These partners were personally invited to share the survey within their organizations. Many of these organizations further extended the opportunity for community members to participate.

The survey was available on the Council’s website home page. Data indicates significant traffic accessed the survey using this link from email and social media outreach.

The social media campaign included announcement of the survey release, press releases, and reminders to participate. Facebook advertising was used to extend TCCWMD’s traditional reach into the community. Additionally, five $100 Visa cards were offered to encourage participation.

When the survey closed on Tuesday, July 25, 2017 a total of 780 respondents from the region had participated. Categories for the 67-question survey included: Business & Economic Development, Healthcare, Infrastructure, Local/State Government, Real Estate, and Worforce.
Demographics:
The majority of respondents were full-time residents of Garrett, Allegany, and Washington counties in Western Maryland.6

- 49% (R=384) reside in Allegany County with Cumberland and Frostburg the most represented at 58% (R=222) and 30% (R=114) respectively.
- 23% (R=176) reside in Garrett County with Oakland the most represented at 48% (R=85).
- 14% (R=105) reside in Washington County with Hagerstown the most represented at 66% (R=69).

Based on zip code analysis of the remaining 14% (R=106) of respondents, the majority reside:

- 49% (R=52) throughout Central Maryland
- 23% (R=24) nearby Pennsylvania
- 14% (R=15) nearby West Virginia
- Virginia and Washington, DC were also represented

When choosing to live in Garrett, Allegany, and Washington counties respondents included:

- 59.9% (R=455) Family
- 58.0% (R=441) Quality of Life
- 37.1% (R=282) Recreational opportunities
- 31.4% (R=239) Employment opportunities
- 13.5% (R=103) selected Other:
  - 18.4% (R=19) listed Schools/Education

Respondents were given the option to provide: gender, age, annual household income.
Based on those who responded Gender representation is determined as mostly female:

- 33.0% (R=258) Female
- 28.8% (R=225) Male
- 38.0% (R=297) declined to answer

Based on those who responded Age representation determined community members under 35 years of age are least represented:

- 29.6% (R=231) 56 years of age and older
- 23.2% (R=181) 36-55 years of age
- 9.6% (R=75) 35 years of age and younger
- 38% (R=296) declined to answer

Based on those who responded Annual Household Income for the region is determined as:

- 9.0% (R=70) reported annual household income under $50,000
- 20.0% (R=157) reported annual household income between $50,001 and $100,000
- 14.2% (R=111) reported annual household income between $100,001 and $150,000
- 12.7% (R=99) reported annual household income over $150,001
- 44.0% (R=343) declined to answer

Respondents identified their roles in promoting economic development in their community as (respondents were able to select all that applied; identifying with 2.80 roles):

- 83.0% (R=635) identified as “a consumer of regional goods and services”
- 79.9% (R=609) identified as “a residential property owner”
- 67.4% (R=516) identified as “owning or operating a business, an employee, an investor, or commercial property owner”
- 42.0% (R=322) identified as “serving as a board member or volunteer for one or more civic or non-profit organization”
- 8.5% (R=65) identified as “an elected local, state, or federal official or local, state, or federal government employee”
**Summary of Survey Findings:**
Respondents free form responses clearly indicate the necessity for job creation as the region’s most pressing need. This need is lower than the previous survey suggesting an improvement in the national economy has positively affected the region. However, even as the need for an educated, skilled, ready workforce closely mirrors the last survey results, the loss of educated young workers (brain drain) presents issues for economic development.

Respondents agree K-12 public education and higher education institutions meet expectations across the region. While higher education supports workforce training opportunities and technical/vocational education supports and prepares students for workforce opportunities; this does not translate into agreement that the region’s workforce is sufficiently skilled and prepared to support development.

Respondents significantly indicate strong support for the tourism industry and recognize the region’s workforce is adequate to attract new tourism related businesses across the region. This similar result is reflected in the previous survey. Development of the existing tourism economy and introduction of additional drivers should be identified to sustain and stimulate economic development opportunities. Along with tourism, respondents agree the retail service industries present strong opportunities for economic development.

Respondents strongly agree that cyber-technology services across all industries provides an opportunity to advance economic development. That agreement continues with computer sciences, e-commerce, and technology development. The weakness of the region’s broadband development was noted for not fully meeting development needs. Increased efforts may allow the region to attract workers (of all ages) to the area with employment opportunities, provide the opportunities to retain young workers in the region (brain drain), and provide professional-level employment opportunities for spouses/significant others of professionals relocating to the area.

Compared to the previous survey, the region’s infrastructure is generally perceived as meeting expectations. However, there are still pockets of the region that are still lacking. Primary roads, secondary roads and transportation infrastructure, and public utilities (water, sewer, trash removal, recycling, etc.) generally meet expectations in areas of the region. As the previous survey indicated; with the exception of the region’s educational institutions, the benefits of broadband connectivity are not being fully realized by the overall region.

Respondents regard government more positively than the previous survey. While this may be a result of the national economy and positive influence at the state level, state and local governments are encouraged to actively support and appropriately provide incentives for regional business development. This includes the revitalization and reutilization of vacant or existing properties for development, increasing exposure to public and private sources of business capital and access to entrepreneurial and small business support services to boost regional development.

Respondents decidedly agree that healthcare services present economic development opportunities in all areas of the region. There is overall agreement that healthcare in the region and the services that are required meet expectations. There is mixed opinion that biotechnology and medical research services present opportunities to expand development.

Respondents were asked to consider drug addiction issues for the first time during this survey. Respondents clearly state that drug addiction is a major problem/very detrimental to the region; comparable to other areas across the state, nation, and Appalachia. While the majority indicated an opinion as to whether adequate mental, behavioral, and addiction resources for those in need over and under 18 years of age are available, a significant number of respondents choose not to respond to these questions. Free form responses may shed light onto why this is the case with many recognizing the high national concern over the addiction/opioid issues, yet indicating that public awareness for the region needs addressed.
Respondents were given the opportunity to provide written, free-form responses expressing their opinion of the current drug addiction issue and its detriment to the region. Of the (R=464) comments the following were presented:

- 70.0% (R=325) indicated a major problem/very detrimental to the area; comparable to others areas across the state, nation, and Appalachia
- 7.5% (R=35) indicated a strain on (or lack of) limited resources/programs
- 6.7% (R=31) indicated an impact to all facets of the community; particularly the quality of the workforce

Other comments included:
- The issue is a symptom of lack of area growth opportunities
- The effects to children/youth being raised by grandparents or others (parents incarcerated); including their education
- The effects on the perception of the area

When asked if access to mental, behavioral, and addictions health care services meets the needs of the region as well as whether adequate resources are available for those over 18 years of age and under 18 years of age respondents indicated:

Respondents were given the opportunity to provide written, free-form responses to the questions regarding access to mental, behavioral, and addictions health care services in the area. Of the (R=233) comments the following were presented:

- 18.0% (R=42) indicated limited residential (rehabilitation) treatment facilities, step down services (halfway house, rehab centers)
- 17.6% (R=41) indicated limited local resources/services for mental health care for children, youth and adults
- 12.9% (R=30) indicated limited addiction health care services (counseling, support groups, community events)
- 10.7% (R=25) indicated a shortage of professionals (psychiatrists, therapists)
- 9.0% (R=21) indicated that addiction has outpaced the services that were available

Other comments included:
- Need for grants or program initiatives to create/continue/expand services
- Promoting services that are available
- Cost of treatment due to minimal insurance coverage for treatment
Respondents were asked to identify from specified categories, where the region’s workforce is adequate to attract new business for the region (respondents were able to select all that applied). Respondents (R=440) selected an average of three categories with results reflected below:

**Survey Analysis:**
Survey respondents were asked to provide written, free form responses at the beginning of the survey. These questions asked for their opinion on, “What is the biggest unaddressed need in the region, the need which most stands in the way of productive economic development;” “What is the biggest opportunity in the region for productive economic development;” and “What is the biggest threat in the region, the threat which most stands in the way of productive economic development.” Responses to those questions were assessed and grouped into thematic categories. Additional opportunities to provide written responses were included throughout the survey. The survey also asked respondents to express their level of agreement with statements regarding the opportunities and threats associated with the region’s economic growth and development; whether those opportunities, present, support, or meet expectations for economic development in the region. Those selections were ranked using the traditional Likert scale: “strongly disagree,” “somewhat disagree,” “neutral,” “somewhat agree,” or “strongly agree.” The average response for each category was determined.

Tri County Council for Western Maryland conducted a SWOT analysis of the region’s strengths, weaknesses, opportunities, and threats. Council staff worked with the CEDS committee, local government, elected officials, business owners, and community members to complete the analysis. Analysis also included an online survey which was designed to indicate what the public felt were strengths and weaknesses for the region regarding Economic Development. The Council had a major outreach and marketing campaign to encourage participation and increase results in the survey. Marketing efforts included Chambers of Commerce, Economic Development Offices, Municipalities, Educational Institutions, civic and non-profit organizations, and social media. Presentations to various organizations around the area were made to promote the survey and convey the importance it would have on determining the region’s future.

When the month-long online survey closed there were 780 responses from across the region. The strategic direction, objectives, and plans of action determined from the SWOT analysis and online survey to maximize the economic potential of the Western Maryland region of Allegany, Garrett, and Washington counties are identified in the CEDS document.

### SWOT Analysis

**Strengths**  
*A region’s relative competitive advantage*

<table>
<thead>
<tr>
<th>Strengths</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Abundant Electricity</td>
<td>Arts &amp; Entertainment</td>
<td></td>
</tr>
<tr>
<td>Healthcare</td>
<td>Higher Education</td>
<td></td>
</tr>
<tr>
<td>History</td>
<td>Interstate</td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td>People/Community</td>
<td></td>
</tr>
<tr>
<td>Quality of Life</td>
<td>Tourism</td>
<td></td>
</tr>
</tbody>
</table>

**Weaknesses**  
*A region’s relative competitive disadvantages*

<table>
<thead>
<tr>
<th>Weaknesses</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to Industrial Sites</td>
<td>Air Travel</td>
</tr>
<tr>
<td>Broadband Access</td>
<td>Cultural Diversity</td>
</tr>
<tr>
<td>Distance to Metro Areas</td>
<td>Geography/Topography</td>
</tr>
<tr>
<td>Public Transportation</td>
<td>Ready Workforce</td>
</tr>
<tr>
<td>Regulations</td>
<td>Water Infrastructure</td>
</tr>
<tr>
<td></td>
<td>(water/waste water)</td>
</tr>
</tbody>
</table>

**Opportunities**  
*A region’s opportunities for improvement or progress*

<table>
<thead>
<tr>
<th>Opportunities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternative Energy Sources</td>
<td>Agriculture</td>
</tr>
<tr>
<td>Autonomous Technology</td>
<td>Bio-Technology</td>
</tr>
<tr>
<td>Changing Perceptions</td>
<td>Cyber-Technology</td>
</tr>
<tr>
<td><em>(social and cultural)</em></td>
<td>Education</td>
</tr>
<tr>
<td>Entrepreneurship</td>
<td>Recreation</td>
</tr>
<tr>
<td>Regional Airports</td>
<td>Workforce Development</td>
</tr>
</tbody>
</table>

**Threats**  
*A region's negative impacts or regional decline*

<table>
<thead>
<tr>
<th>Threats</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to Water</td>
<td>Cost of Utilities</td>
</tr>
<tr>
<td>Declining Coal Industry</td>
<td>Declining Youth Population</td>
</tr>
<tr>
<td>Failing Infrastructure</td>
<td>Increased Drug Addiction</td>
</tr>
<tr>
<td><em>(or lack of)</em></td>
<td>Regulation</td>
</tr>
<tr>
<td>Traffic Congestion</td>
<td></td>
</tr>
</tbody>
</table>
Identification of Tier 1-3 Initiatives

The initial Tier I-III initiatives were developed from a review of the 2013-2017 CEDS document, status of regional needs, economic conditions, results of an online survey, and SWOT analysis. The online survey was distributed throughout the three county region to gather public input on the most important economic drivers.

The CEDS Committee formed a Survey Committee to develop the online survey. The survey was designed to indicate what the public felt were strengths and weaknesses for the region's economic growth and development. The Council had a major outreach and marketing campaign to encourage participation in the survey and increase results. Marketing efforts included the TCCWMD membership, newsletter databases, Chambers of Commerce, offices of Economic Development, community partners, civic organizations, education institutions, and municipalities as well as the media. Launch of the survey was followed by an email and social media outreach. The social media campaign included advertising that extended the Council's traditional reach into the community. TCCWMD invited the regional community to have strong and substantive input in the process and encouraged the region to prioritize issues that affect Western Maryland’s future.

The CEDS document has five Tier 1 initiatives that were based upon total score and importance and determined through outreach that included the survey results with general public input and a SWOT Analysis. Additionally, the top five initiatives were then chosen by the Committee as the focus for the region during the upcoming 2018-2022 five-year period.

**Tier 1 Strategic Initiatives**

There were three specific categories that identified the majority of the Tier 1 initiatives. These three categories were then given special attention to define the highest scoring Tier 1 initiatives in the particular categories. The selection of these topics were deemed as the most important areas of focus in the region with the additional Tier 1 initiatives in that particular category deemed as “Supporting Issues”. Tier 1 Categories are as follows:

1. Business and Economic Development
2. Education and Workforce Development
3. Infrastructure

The Plans of Action for the first year of the five year CEDS was designed to implement the Tier 1 initiatives that were chosen as the most important. These initiatives will be revisited in subsequent years to determine which initiatives were completed and place new priorities on those that may have become regionally more significant.

**Tier 2 Strategic Initiatives**

Tier 2 initiatives were ranked high and seen as issues of regional importance but in recognizing the limited amount of resources available to complete various initiatives these items were placed in a lower Tier. For this reason, Strategic Initiatives for these items were not created; however, these issues will be further reviewed to see how they play a key role for Tier 1 initiatives. Depending upon the types of resources that are available in the upcoming year, the priorities of the Committee remain flexible to elevate Tier 2 issues to Tier 1 based upon availability of funding to complete the task. These items will also be evaluated against the outcome of this year’s five primary issues.

The Categories for Tier 2 issues are as follows:

1. Changing Community Perceptions
   (Social and Cultural Opportunities)
2. Technology
3. Addiction Services
4. Healthcare Applications
5. Local Government
6. Leadership Training
Tier 3 Strategic Initiatives

Tier 3 initiatives are those initiatives that did not score high enough for consideration as projects that are in need of funding for the upcoming fiscal year. Tier 3 initiatives are generally supporting items for Tier 2 initiatives or projects that should require no action under the current plan. While these items are desirable in the long run and remain flexible for funding in an ideal scenario they are not to be considered priorities.

TIER 1 CATEGORIES

1. Business and Economic Development
   a. Key Issue: Entrepreneurship and Small Business
   b. Related and Supporting Issues
      i. Communications Technology
      ii. Energy
      iii. Healthcare
      iv. Advanced Manufacturing (Small, Medium, and Large Scale)
   v. Access to Capital
   vi. Cost of Employer Provided Benefits
   vii. Need for Targeting Activity Clusters
   viii. New Incentives for Businesses

2. Business and Economic Development
   a. Key Issue: Leverage Assets to Increase Competitiveness
   b. Related and Supporting Issues
      i. Communications Technology
      ii. Energy - Traditional
      iii. Healthcare
      iv. Advanced Manufacturing (Small, Medium, and Large Scale)
   v. Access to Capital
   vi. Cost of Employer Provided Benefits
   vii. Need for Targeting Activity Clusters
   viii. New Incentives for Businesses

3. Education and Workforce Development
   a. Key Issue: Coordination Between High Schools, Colleges, and Employers for Workforce Training
   b. Related and Supporting Issues
      i. Availability of Continuing Education Opportunities
      ii. Coordination Between Community Colleges, Private Colleges and Universities and Departments of Economic Development
      iii. Maintaining Strong Post-Secondary Colleges and Universities
      iv. Availability of Career and Technical Schools
   v. Student Access and Affordability of Post-Secondary Education as well as the EARN (Employment Advancement Right Now) Initiative which connects schools with potential employers

4. Infrastructure
   a. Key Issue: Broadband and High Speed Infrastructure, Affordability and Access
   b. Related and Supporting Issues
      i. Water and Sewer
      ii. Streets, Roads and Bridges

5. Infrastructure
   a. Key Issue: Infrastructure Improvements
   b. Related and Supporting Issues
      i. Water and Sewer
      ii. Streets, Roads and Bridges
1. Promoting Development

The Council seeks to implement the Goals and Objectives outlined through the planning process used to formulate the CEDS document. The Council continues to work directly with new and expanding businesses by developing business plans and coordinating efforts with local banks and economic developers to ensure that companies that begin or expand have a continued high rate of success in long-term economic viability. The Council also continues to expand its Revolving Loan Fund through State resources given the current unavailability of funds through federal partners.

The Council is hopeful that defederalization of current loan funds will occur in the near future allowing the Council to leverage other federal funds. This will allow the Council to recapitalize the current loan funds and put more money to work on the streets. In this economic climate, access to resources and technical assistance have been an identified need for businesses that are starting or expanding.

The Council has branded Summit Financing Solutions which serves as an umbrella organization for the Revolving Loan Fund (RLF) and Video Lottery Terminal Account (VLT) to enhance the economic activity in Allegany, Garrett, and Washington counties. Funding opportunities assist for new and expanding businesses. Marketing includes the chambers of commerce in the three county region.

The Council continues to work with Frostburg State University who currently operates the regional Small Business Development Center. In an effort to not duplicate services, long range plans are being developed to identify strengths and weaknesses of both organizations.

2. Fostering Effective Transportation Access

One of the sub-committees of the Council CEDS process is based on infrastructure, which includes working to foster effective transportation access. The Area Development Projects Priority List FY18 outlines several key projects needed to ensure a healthy business climate to the area including interstates that connect commerce region wide. The Council also works directly with the Appalachian Regional Commission to support the development of the Appalachian Development Highway System. This process has been ongoing since its inception in the 1960’s and is not scheduled to be completed for decades. While the plan is in place, the billions of dollars needed to complete the projects are not. The Council keeps in regular contact with actions of Congress on these issues. Many of the needed issues are addressed in Economic Resilience.

The Council continues to work with the Maryland Transit Authority to coordinate several grant programs including the New Freedom Program, Job Access Reverse Commute Program and the Senior Rides Program. The Council serves as a clearinghouse to receive applications, host a review committee and recommend recipients to the State of Maryland for review.

3. Enhance and Protect the Environment

The Council has targeted natural resources as one of the area’s key assets and has worked to promote the responsible use of the environment. The region is rich in abundant electricity supplies and alternative energy sources which will continue to be accessed to serve existing and new economic development opportunities. All projects funded through the Council and its agencies are subject to state Clearinghouse Review, making sure that the Maryland Department of Environment and all appropriate state agencies have a comment and recommendation period prior to implementation.

The Council also works directly with the Maryland Department of Planning to ensure projects are consistent with Smart Growth Legislation. This Legislation ensures that no state or federal funding is utilized for projects that are not located in a Priority Funding Area or receive an exemption from the state. “Plan Maryland” is in place to guide future development based upon the current use of the land and many geographical characteristics the land holds.
4. Workforce

Workforce continues to be a key issue facing the area. This topic has been addressed at its grass roots level, namely education. Since many of the young people of the area move to find employment, it is essential to promote workforce at a young age and build from the bottom up. Tri-County Council for Western Maryland also serves as administrator for the Western Maryland Education Consortium for the three counties with a focus on STEM (Science, Technology, Engineering, and Math) education.

In addition to the building of workforce, the Council also works closely with the local representative from the Maryland Department of Commerce to promote adult education. The Maryland Department of Commerce works with companies, new or expanding, to train workers for specific needs. Many of these trainings are in cooperation with local community colleges with programs tailored to suit those needs. However, a lack of funding exists to support these programs.

Through the Maryland Department of Commerce and the Appalachian Regional Commission the Council has worked with Allegany County to ensure all public schools have high speed internet available in all classrooms. This is a major achievement for a rural county.

Typically, unemployment in Western Maryland has been higher than in most parts of the state with the exception of Washington County which historically has been around 4%. Maryland unemployment rates as of September 2017 indicate Allegany County with the fourth highest unemployment rate in the state at 4.5% while Garrett and Washington counties rank eighth and ninth respectively, with a rate of 3.8% each.¹

5. Promote Technology

The Council encourages the submittal of technology related projects for consideration for Appalachian Regional Commission funding. The rural tri-county area has one of the newest wireless technologies in place in an effort to keep broadband costs affordable. The Council is currently working with the Maryland Broadband Cooperative to expand fiber in the region.

6. Obtaining and Utilizing Funds

The Council utilizes funds available and always seeks to find other venues to promote business and technology. Funds from local governments help match the EDA Planning Grant that allows the creation of the CEDS. Additional funds from Federal, State and local partners continue to become increasingly difficult to obtain. The Council, through its planning process and detailed work program, works to maximize the use of all funds. A strong lending program enables TCCWMD to fund startup businesses and expansions of businesses in the region.
The Council seeks to implement the Goals and Objectives outlined through the planning process used to formulate the CEDS document. The Council continues to work directly with new and expanding businesses by developing business plans and coordinating efforts with local banks and economic developers to ensure that companies that begin or expand have a continued high rate of success in long-term economic viability. The Council also continues to expand its Revolving Loan Fund through State resources given the current unavailability of funds through federal partners. In the past, access to capital has been the number one reason that businesses were not starting up or expanding. While undercapitalization still remains a problem, training and technical assistance are now the biggest impediment to success. The Council is currently working on a pilot program to offer technical assistance to companies in the form of professional services and training. The Council will monitor those recipients over time and continue to find resources to continue that program.

The CEDS document has five Tier 1 initiatives that were based upon total score and importance and determined through outreach that included the online survey results and general public input. Frostburg State University is currently beginning an Office of Economic Development which Tri-County Council anticipates using to strengthen our continued outreach to the community.

- **Strategic Initiative 1**: Broadband and High Speed Infrastructure and Access
  **Goal**: The goal of the Broadband and High Speed Infrastructure and Access Initiative is to provide all of the residents of the region access to affordable and competitive Broadband Services.

- **Strategic Initiative 2**: Leverage Assets to Increase Competitiveness
  **Goal**: Become more competitive with other regions by leveraging the assets of the region that make the area an attractive place to do business. The competition for new businesses and employees in the region is no longer just a matter of competing locally. The region is preparing itself to compete globally by providing the infrastructure, training and workforce needed to attract and retain employees and businesses.

- **Strategic Initiative 3**: Coordination Between High Schools, Colleges, and Employers for Workforce Training, Agriculture, and Economic Development
  **Goal**: The goal for coordination between high schools, colleges, and employers for workforce training is to provide education and training across the region for essential vocations at the High School level while allowing a smooth transition for students to further their training at the local college level or trades industries and enter the workforce prepared.

- **Strategic Initiative 4**: Infrastructure Improvements
  **Goal**: Improve and maintain the overall water, sewer, and transportation infrastructures throughout the region.

- **Strategic Initiative 5**: Entrepreneurship and Small Business
  **Goal**: Give small businesses and entrepreneurs the tools and resources necessary to start up and grow in the region.
Strategic Initiative 1: Broadband and High Speed Infrastructure and Access

Goal: The goal of the Broadband and High Speed Infrastructure and Access Initiative is to provide all of the residents of the region access to affordable and competitive Broadband Services.

Objective:
1. Connect all community anchor institutions (CAI) to high speed internet in order to offer the best possible service to our citizens. The National Telecommunications and Infrastructure Administration (NTIA) has described “Community Anchor Institutions” as schools, libraries, medical and healthcare providers, public safety entities, community colleges and other institutions of higher education, and other community support organizations and entities.
2. Increase the number of providers in the region in order to foster competition in the region in order to bring the price of services down.
3. Increase availability of Broadband access to the region’s businesses at an affordable price making them nationally competitive to conduct business.

Plan of Action:
1. Continue to expand the regional fiber and wireless systems across the region through cooperation with the Maryland State Department of Information Technology (DoIT) and the Maryland Broadband Cooperative (MDBC),
2. The MDBC is a non-profit entity that operates in the traditional format of a cooperative by making the infrastructure that it owns available to any member. Essentially the fiber that is located statewide will be available for members to use to provide services to their customers. This means that many small ISP’s could potentially offer services in areas across the state where they currently do not own infrastructure.
3. There are several areas across the three counties where new fiber will need to be installed using funding from State, Federal, and local sources. Other parts of the region already have fiber assets; however, they are not yet available for private usage. The Council will work with DoIT to share the resources that are already deployed but underutilized.
4. All three counties have adopted long term plans to increase access. The studies not only identify the geographical areas that are most in need, but also the most probable approaches for deploying services to those areas. These may be a combination of wifi, fiber and other technologies that will be used to reach remote areas. Additionally, the studies show the challenges the region faces with current services that are being offered and how they may be overcome.
Strategic Initiative 2: Leverage Assets to Increase Competitiveness

Goal: Become more competitive with other regions by leveraging the assets of the region that make the area an attractive place to do business. The competition for new businesses and employees in the region is no longer just a matter of competing locally. The region is preparing itself to compete globally by providing the infrastructure, training and workforce needed to attract and retain employees and businesses.

Objective:

1. Provide specialized industry specific training to ensure that new businesses have a knowledgeable workforce in a minimal timeframe.
2. Enhance the quality of technical school education in the region to provide a skilled workforce in targeted industry sectors.
3. Increase incentives to locate a business in Western Maryland.
4. Create the technology based infrastructure needed to compete in the market place.
5. Communicate and coordinate between counties in the region to ensure that businesses will not be lost to other areas in the Mid Atlantic.
6. Provide the necessary tools for local businesses to remain viable.

Plan of Action:

1. The local community colleges play an integral part in developing curriculum that will serve the needs of local businesses. Classes can be designed to be industry specific by working directly with companies that require a specific type of training. Additionally, the local Boards of Education continue to broaden their curriculum to prepare students for post-secondary education. This includes meeting demands for college and career readiness at the career and technical centers with offerings not limited to, pre-nursing, law enforcement, hospitality, IT, and the trades.
2. Across the region this calls for the development of new schools or programs that support new technology and courses that are industry specific. Courses will continue to be created that will focus on technology based industry sectors such as computing, machinists, robotics, nursing, tourism, cyber-technology, biotechnology, and renewable energy sources.
3. Expand opportunities for Enterprise Zones or other incentives associated with such areas. Market hub zones to industries that can use them to their advantage when working with government contracting. Promote the Biotechnology and Cybersecurity Investment tax credits for locating in the region as well as the More Jobs for Marylanders Manufacturing Tax Credit, Job Creation, Research & Development, One Maryland, and Arts & Entertainment District tax credit programs.
4. Each County currently has a plan for expanding the availability of broadband in their respective area. Implementation of each plan will take many years. This plan includes serving the critical business and industry sectors as well as targeting locations close to cell towers, which is considered one of the up and coming modes of connecting to the internet via an air card or some other tethering device.
5. The counties currently work with the state of Maryland on communication and coordination when dealing with new businesses entering the area. There is also a considerable amount of communication via the Tri-County Council’s role as Economic Development District. The individual county’s Economic Development Departments play a critical role on the projects and CEDS committees. Additionally, the I-68 Regional Economic Partnership Cluster Target Industry Study will include the development of a regional asset map, regional labor shed analysis, a target industry list and a county specific, as well as regional, list of recommendations. Data and maps will serve as resources for new and expanding companies to reference when looking to build, hire, or expand.
6. To serve the needs of the business and entrepreneurial community, Tri-County Council provides technical assistance for companies to acquire professional services that will enhance their business and their opportunity for securing required financing.
Strategic Initiative 3: Coordination between High Schools, Colleges, and Employers for Workforce Training, Agriculture and Economic Development

Goal: The goal for coordination between high schools, colleges, and employers for workforce training is to provide education and training across the region for essential vocations at the High School level while allowing a smooth transition for students to further their training at the local college level or trades industries and enter the workforce prepared.

Objective:
1. Increase the opportunities for students in the vocational trades at the high school level which will prepare them for college and career readiness.
2. Increase the number of students going into the building and trade industry.
3. Offer courses specific to industry sectors by working directly with regional manufacturers to develop classes/programs unique to our area.
4. Increase the skill level for IT related fields focusing on emerging fields as cyber-technology and autonomous technology in preparation for college and career readiness.
5. Increase agricultural programs.

Plan of Action:
1. By making the career centers an extension of High School rather than an alternative, the career centers are attracting more students. By expanding the curriculum, more students will choose the trades industry which is desperately in need of workers. With the establishment of the Allegany County Pathways in Technology Early College High (P-Tech) School, students will combine high school, college and the world of work. The P-Tech School will be located at the Center for Career and Technical Education. Education begins in grade nine through high school completion and culminates in an Associate Degree program. The program will provide career opportunities in the field of cyber security.
2. Vocational schools exist in all three counties of the region. Collaboration of the three county’s efforts can increase awareness of the educational training provided and create opportunities for those who will be prepared to enter the workforce or continue their education through college upon completion. Current articulation agreements with trade schools and colleges should continue to allow students to earn college credit while attending at the high school level.
3. Align colleges with the Regional Manufacturers Roundtable to collaborate and determine needs in the industry and develop curriculum for new and current workforce opportunities.
4. Traditional manufacturing is now evolving into advanced manufacturing meaning that every aspect of business now includes computer-aided machinery. By training students on devices like CNC machines and computer devices from industries like automotive repair to autonomous technology, is a key step towards preparing them for college courses and career opportunities related to the industry.
5. The emphasis on locally sourced foods has gained national attention. Various programs are currently in place in the region’s public school districts at the elementary, middle and high school level. Some districts are more limited than others as expansion of the programs have proven difficult under the already strained budgetary restrictions. Courses for organic markets and locally grown foods as well as viticulture need to be developed or expanded as these industries begin to form and grow in the region. Maryland 4-H Programs exist in all counties of the region and actively support programs for youth and adults.
Objective:
1. Meet the Total Maximum Daily Load (TMDL) requirements as set by the State of Maryland.
2. Provide the quantity and quality of water necessary to serve the region.
3. Provide adequate sewer resources to serve the region and allow for expansion as needed by residential and business growth.
4. Separation of combined storm water and sanitary sewer.
5. Provide the quality of local access roads, primary and secondary roads, and transportation infrastructure necessary to serve the region.
6. Return fully funded local highway user revenues to pre-recession levels to assist local governments in funding transportation services and facilities.

Plan of Action:
1. The State of Maryland now requires comprehensive plans to be developed based upon watersheds so that a TMDL can be assessed for that particular area. The regulations require that by 2025 all TMDL requirements must be met or substantial penalties may be put in place which would restrict growth in areas not meeting the goals. Each county now meet the goal of supplying those plans based upon water sheds. Growth elements are now being put in place to monitor those loads and monitor growth in those areas. Substantial investments will need to be made in treatment plants across the region to meet the requirements. Grants through ARC, MDE, EPA, and USDA are being utilized in order to control the amount of sediment and nutrients that will enter the surface flow in a particular area.
2. Water resources are one of the most important elements for not only residential growth but also industrial and commercial growth. The majority of Western Maryland that draws from surface water to supply their region does not have an issue with availability, but upgrades will need to be made to treatment plants over time in order to support the quantity of water needed to supply major users in order to attract those businesses. More importantly, the water lines in the region are aging and many of them are badly in need of replacement. Currently, grants and placement into the capital improvement plan are the only source of funding to correct this problem. The problem is largely addressed on an as needed basis but funding is not always readily available to make major repairs.
3. The sewer lines in the region are aging rapidly and many are in need of replacement. Many of these lines have been replaced as part of the goal to separate storm water from the sewer which will also address the issue of combined sewer overflow. Currently, many of the small municipalities are under consent orders to upgrade the plants for their towns. Until such time as the plants needs are met, the cities face restrictions on adding any new users to the system. ARC and MDE funds are used in connection with USDA but there just does not seem to be enough money to go around particularly with the waning tax base.
4. The separation of the storm water and sanitary sewer is a goal that is to be met by 2025 in the State of Maryland. Basically this means that every sewer pipe in the entire region will need to be duplicated in order to handle storm water in separate lines from the current sewer lines. This will need to be done at the same time as maintaining the current system. While everyone is trying to comply, these mandates are currently unfunded, which means grants and local funds are needed to make this project happen. The price tag on completing this across the three counties is hundreds of millions of dollars. The counties continue to look to ARC, USDA and the State of Maryland for funding to continue to move forward with this mandate.
5. Support funding of transportation projects that create the opportunity for access to business and industry that produce new jobs or retain businesses within the region and support economic and community development.
6. Encourage legislators at the State level to return local highway user revenues to pre-recession levels. At that time, various categories of State assistance to local governments were restructured and local highway user revenues were significantly reduced. This has directly impacted transportation projects for Counties and Municipalities in Western Maryland.
Strategic Initiative 5: Entrepreneurship and Small Business

Goal: Give small businesses and entrepreneurs the tools and resources necessary to start up and grow in our region.

Objective:
1. Provide available gap financing for businesses that cannot get the required funding they need from traditional sources.
2. Ensure that the Small Business Development Center (SBDC) and Small Business Administration (SBA) provide adequate support for new businesses that are starting up as well as existing businesses that are struggling or growing.
3. Provide adequate training classes in the region to provide the necessary information to those wishing to start a small business.
4. Develop necessary incubator space to support small businesses by reducing their overhead and having business leaders there to advise and guide them.
5. Increase awareness of funding programs to the general public and financial institutions to promote more small business growth.

Plan of Action:
1. Currently the Council has 11 district loan funds with the sole purpose of providing gap financing to small businesses to create or retain jobs in the region. Attempts to recapitalize this fund in any significant amount have occurred over the last several years with very limited success. The current funds are being spent down rapidly as credit is becoming harder to receive from the banks. The Council has a plan of action in place to try to increase available funding. The strategy is the process of consolidating the several EDA loan fund accounts into one account. While this action in itself does not increase capital, it puts in place an immediate tool to match other federal dollars should Congress decide to eliminate the federal status of those funds which have already been revolved several times. The process includes working with legislators to de-federalize these loan funds which would allow matching for new federal dollars.
2. The SBDC provides resources to small businesses in the form of financial projections, business plan support, and general counseling. Counselors are in place in Allegany, Garrett and Washington Counties. The Council encourages all businesses interested in our lending programs to work with the SBDC for guidance.
3. The SBDC provides many training classes throughout the year in each county as well as working with SBA which also offers many training classes on their various programs including the SBA 504 loan guarantee programs. These classes should increase as the number of personnel increases in the region.
4. Currently, incubator space is available in all three counties, although as new businesses emerge and few graduate from those facilities there is an increased demand for those types of spaces. These spaces are very necessary as they decrease the overhead for new businesses and provide onsite counseling to those companies. Several counties have expressed an interest in providing new incubator space, particularly for small industrial and technology firms. The current incubator spaces are more tailored for an office environment.
5. Many of the small businesses are not aware of how to access resources that are available to support their start-up and growing needs. The Council keeps a detailed list of programs including SBA, MEAF and the Maryland Department of Commerce. The Council markets our programs through the Chambers of Commerce, website, marketing kits, state communication and a direct relationship with area banks and their loan officers. The Council also provides technical assistance for companies to acquire professional services that will enhance their business and their opportunity for securing required financing.
Economic Resilience -

Tri-County Council for Western Maryland is the only Local Development District (LDD) in the state and therefore contributes greatly to the input of the strategic plan. The board members are a diverse group of private business leaders as well as public officials. The Council has five workgroups that contribute to the planning efforts in the region. These groups again reflect the geographic diversity of the area. The work groups define not only what projects need to be completed to achieve the goal of the region but also identify legislative initiative that would contribute to the growth and sustainability of Western Maryland.

At the heart of the region lies Frostburg State University (FSU), the only state university in Appalachian Maryland. The University System of Maryland operates a satellite campus in downtown Hagerstown. Within each of the three counties are community colleges, which work directly with FSU and USMH as well as the local Boards of Education. The focus at all levels of education is academic excellence and the interest of growing our own workforce by addressing labor force training needs and fostering entrepreneurship. Additionally, FSU continues to focus on exploring alternative energy and community capital in the agricultural sector. FSU has been included in the Princeton Review’s “Guide to 375 Green Colleges,” an annual listing of the nation’s most environmentally responsible “green” colleges, numerous times since the guide began publication in 2010.7

The State of Maryland recently announced an investment at Frostburg State University to establish an Office of Regional Development and Engagement (RDE) to further economic development in Western Maryland. The Office will integrate University resources with regional partners to help communities and companies be competitive and meet the challenges of economic and community development. The three main priorities will be: sharpen and support the regional focus on industry clusters identified for their potential in the region; regional entrepreneurship; and education in collaboration with the region’s community colleges.7

The Appalachian Maryland State Implementing Strategy Statement and Investment Program Fiscal Year 2018 reflects the needs of the region as addressed by the Council’s CEDS committee as well as those identified through coordination with the various departments of economic development.

Western Maryland has a long, rich tradition of manufacturing, and as such, it is a cluster industry in the region. Starting in the early 1900’s with employers such as Kelly Springfield, textile mills and steel producers it still remains one of the most vital and consistent industry sectors in the region. While many of the old factories that employed thousands of employees have closed down, the region has diversified to include many medium sized manufacturers that employ 300-500 employees and thus become more stable.

In recent years, workforce has become a much more important factor than location. With declining unemployment rates and the lack of skilled labor around the nation, traditional manufacturers have moved to the rural areas such as ours to take advantage of the labor pool and natural resources abundant in our region.

With traditional manufacturing, many of the manufacturing based clusters in the region are related to the housing industry, such as; closet fixtures, window blinds and cabinetry. When a decline in the housing market occurs, these industries downsize and feel the economic strain. Unfortunately, if that industry is in decline then a major portion of the economy is also in decline. The development of advanced manufacturing across the region; an industry cluster based on information technology, innovation, design, and custom-tailored products, provides diversity to the manufacturing based cluster.

Available tax incentive programs the region offers include: Biotechnology Investment Incentive, Brownfields Tax Incentive Cybersecurity Investment Incentive, Enterprise Zone, Job Creation, More Jobs for Marylanders-Manufacturing Tax Credit, One Maryland, Regional Institution Strategic Enterprise (RISE) Zone Program and Research & Development.
Across the region, community colleges have identified the skills required to obtain employment and developed industry-specific training programs that allow students to gain hands-on experience and prepare for a career in advanced manufacturing. Upon completion, students are eligible to receive industry-recognized certification and are available to meet the demand, from a variety of industries, for a customized workforce. Additionally, the recent survey analysis indicates a combined 41.3% of respondents strongly/somewhat agree that advanced manufacturing provides employment opportunities for highly trained and skilled workforce in the region.

The region has experienced an increase in the Education & Health Services industries. Garrett Regional Medical Center in Garrett County, Western Maryland Health System in Allegany County, and Meritus Hospital in Washington County are the top employers for their respective counties despite having fewer doctors per population than the national average. Garrett College (Garrett), Frostburg State University ( Allegany), Allegany College of Maryland (Allegany), and Hagerstown Community College (Washington) are listed in the Top 20 Major Employers for their respective counties.9

Trade, Transportation & Utilities industries continue as a strong sector of employment. Employment opportunities in the Leisure & Hospitality industries are growing region-wide.

<table>
<thead>
<tr>
<th>Percent of Workforce</th>
<th>Manufacturing</th>
<th>Education &amp; Health Services</th>
<th>Trade, Transportation &amp; Utilities</th>
<th>Leisure &amp; Hospitality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Garrett</td>
<td>7.9%</td>
<td>15.1%</td>
<td>21.9%</td>
<td>14.4%</td>
</tr>
<tr>
<td>Allegany</td>
<td>9.9%</td>
<td>22.2%</td>
<td>17.5%</td>
<td>12.5%</td>
</tr>
<tr>
<td>Washington</td>
<td>9.5%</td>
<td>16.4%</td>
<td>26.2%</td>
<td>9.7%</td>
</tr>
<tr>
<td>State of Maryland</td>
<td>4.0%</td>
<td>16.4%</td>
<td>17.4%</td>
<td>10.6%</td>
</tr>
</tbody>
</table>

Average Annual Employment 2017 by Industry Sector per County9
With technology becoming more important, particularly broadband connectivity, this has become the focus of the region. Almost every industry sector today now competes on a global level and this has not gone unrecognized. Cities and counties now are building their own networks with the help of the state and federal government aid to ensure a healthy business environment. In 2010 the state of Maryland was a recipient of $115 million through the American Recovery and Reinvestment Act (ARRA). Part of the grant conditions was to provide rural areas of the state with fiber high-speed internet for open access. This was a huge step forward in providing cost effective broadband to Western Maryland Internet Service Providers.

The arrival of the Maryland Broadband Cooperative to Western Maryland in 2010 also helped spark the interest in technology and drive companies to consider rural areas as real contenders in the technology job market. The Broadband Cooperative was tasked with making Maryland the first state that is completely wired. Funding cuts have slowed the effort, but the goal, although delayed, is still obtainable. Funding for this project was provided by many sources although American Reinvestment and Recovery Act (ARRA) funding contributed the majority of the funds.

Since new networks were completed in Fall 2013 and became available in Spring 2014, fiber has been installed across the region, through cooperation with the state of Maryland, to provide access to the majority of schools, libraries, public safety entities, and health care institutions. Fiber installation is still needed to connect several community anchor institutions. High-speed internet access is available in most of the urban areas of the region and is becoming more economical for companies to consider relocating. Garrett County has one of the newest wireless technologies in place in an effort to keep broadband costs affordable.

Diversity is the key to the economy, and many companies are taking advantage of low labor costs combined with affordable technology costs. Washington County has technology jobs, but all three counties consider this industry very important and see it growing in the future. All three counties have adopted long term plans to increase access to broadband services to residential areas.

While the benefits of broadband connectivity are not being fully realized by the overall region; all of Western Maryland is focused on and committed to bringing the much needed infrastructure and information technology competition to the area. The Maryland Broadband Cooperative is committed to the infrastructure in Garrett, Allegany, and Washington Counties.
While the regional economy has a history in manufacturing, the Western Maryland region workforce is highly skilled with wages remaining competitive; 76.1% of the more than 124,899 members of the labor force population are employed in their resident county. Professional, technical, and service-related industries remain the top employers. The region is emerging as a center for technology.

![High Tech Industries in Western Maryland](chart)

From 2001 to 2014 the State of Maryland has seen an increase of 31% in high-tech industry businesses growing from 12,360 in 2001 to 16,188 in 2014. While Washington County shows the greatest gain (32) in the number of high-tech business during that same time period of the three western counties, it encompasses only 1.1% of the technology businesses in the State. Allegany County (63) and Garrett County (59) each hold 0.4% of the industry’s business opportunities. The Western Maryland counties are poised for growth in the technology industry. With the Biotechnology and Cybersecurity Investment tax credits, offering incentives to high-tech and biotech industries to locate in rural Maryland, programs are continuing to educate and prepare the regional workforce. Additionally, a combined 52.4% of survey respondents strongly/somewhat agree that cyber-technology services across all industries provides opportunities to advance the region economically. That agreement continues with 56.6% of respondents strongly/somewhat agree that computer sciences, e-commerce, and technology development will enhance economic development opportunities for the region.

The newly established, Mountain Maryland Tech Network (MMTN) is a regional organization formed to support and engage technology professionals and entrepreneurs in Western Maryland. The free network provides a support system for the technology ecosystem in Garrett, Allegany, and Washington counties. MMTN presents exclusive workshops, networking opportunities, and training seminars to its members. With a rotating schedule of events throughout the western Maryland region, MMTN hopes to engage and support those in the technology sector and further drive collaboration, business formation, community and enterprise success and job creation.

The Mountain Maryland Tech Network was founded as a result of a collaborative effort between four institutions of higher learning in Western Maryland: Garrett College’s Center for Entrepreneurship & Innovation/Garrett Information Enterprise Center (GIEC); Frostburg State University and Allegany College of Maryland’s Western Maryland IT Center of Excellence; and Hagerstown Community College’s Technical Innovation Center. The MMTN provides practical, actionable, connections and information to potential, new or existing technology business owners, managers and technologists.
Mining and natural resources also make up an economic cluster in the region. Western Maryland is home to mines from Washington County to extreme western Garrett County. The eastern-most portion of the region is largely focused on rock quarries. With huge tracts of limestone and sandstone available, this industry is a major source of road and building raw materials. As you move further west through the region, quarries can still be seen, but coal mines from Western Allegheny County and through most of Garrett County contribute a large amount of revenue to the economy. In future years, natural gas exploration and wells, will most likely become commonplace as this industry is already taking a foothold in the states to the north and south. There have been many discussions about targeting this industry and the development that occurs around it, but currently the practice is not legal in the State of Maryland.

The United States is undergoing a rapid energy transformation, particularly in the power sector. Increased natural gas production, declining costs for renewable energy, increases in energy efficiency, and other changes in the market place are changing the way electricity is generated and used across the country. These trends are impacting workers and communities that have relied on the coal economy as a source of jobs and economic prosperity.\(^\text{12}\)

The POWER (Partnerships for Opportunity and Workforce and Economic Revitalization) Initiative is an integrated, multi-agency effort to invest federal economic and workforce development resources in communities and regions negatively impacted by changes in the coal economy, and the entire related supply chain of coal-reliant industries. The coal economy includes, but is not limited to, coal mining, coal-fired power plants, along with related transportation, logistics, and supply chain manufacturing.\(^\text{13}\)

The POWER Initiative seeks to create a more vibrant economic future for coal economy communities by cultivating economic diversity, enhancing job training and re-employment opportunities, creating jobs in existing or new industries, supporting entrepreneurial development and attracting new sources of investment.

POWER projects must be located within and targeted to communities or regions that have been impacted, or can reasonably demonstrate that they will be impacted, by coal mining employment loss, and/or coal power plant employment loss, and/or employment loss in the supply chain industries of either.

In the Western Maryland Region, TCCWMD was awarded a federal technical assistance grant to develop an economic development plan for the I-68 region in Maryland and West Virginia. \(^\text{14}\) The I-68 Regional Economic Partnership Cluster Target Industry Study will include the development of a regional asset map, regional labor shed analysis, a target industry list and a county specific, as well as regional, list of recommendations. Data and maps will serve as resources for new and expanding companies to reference when looking to build, hire, or expand.

Interstate 68 is a 112-mile east-west interstate traversing through western Maryland and northern West Virginia, and connects with I-70 to the east and I-79 to the west. The interstate is relatively new, with the last section completed in 1991. The counties and cities in which the Interstate passes through (or is nearby), came together to form the Regional Economic Partnership: Allegany County, the City of Cumberland, the City of Frostburg, and Garrett County, Maryland, in addition to Mineral County, Preston County, Monongalia County, and the City of Morgantown, West Virginia. This is the first time that partnership of economic development organizations crossing-state lines has been formed for the I-68 corridor. The large-scale project is a proactive approach to diversify the economy to achieve economic resiliency during times of uncertainties, to include the diminishing demand for coal.

The next phase for the I-68 Regional Economic Partnership will be to implement the results based on recommendations of the study.
With the reality that the coal industry is in decline nationally, the Appalachian Region has seen a rapid decline over the past five years. From 2000 to 2011 Appalachia contributed about two-thirds of the coal mining jobs in the U.S. However, the Appalachian Region has seen a rapid decline over the past five years and its share of coal jobs has dropped to 57% in 2015; the lowest in fifteen years. While the U.S. has lost 28% of coal jobs from 2011 to 2015, Appalachia has seen a decrease of 37.5%. This loss does not include indirect, supplier, or modes of transportation reductions in jobs.\(^{14}\)

<table>
<thead>
<tr>
<th>Mining, Quarry, Oil &amp; Gas Extraction Employment 2005-2015</th>
<th>% Change 2005-2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Maryland</strong></td>
<td></td>
</tr>
<tr>
<td># of Establishments: 92-96 88 84 78 73 74 75 75 72 76</td>
<td>-17.4%</td>
</tr>
<tr>
<td># of Employees: 1999-1814 1686 1603 1484 1267 1314 1365 1206 1098 1077</td>
<td>-46.1%</td>
</tr>
<tr>
<td><strong>Allegheny County</strong></td>
<td></td>
</tr>
<tr>
<td># of Establishments: 9-7 10 9 9 8 8 6 6 5 5</td>
<td>-44.4%</td>
</tr>
<tr>
<td># of Employees: c c c c c c c c c 107</td>
<td>undetermined</td>
</tr>
<tr>
<td><strong>Garrett County</strong></td>
<td></td>
</tr>
<tr>
<td># of Establishments: 12 11 10 9 9 9 10 11 9 8</td>
<td>-33.3%</td>
</tr>
<tr>
<td># of Employees: e e 388 321 365 325 347 458 345 211</td>
<td>-45.0% est.</td>
</tr>
<tr>
<td><strong>Washington County</strong></td>
<td></td>
</tr>
<tr>
<td># of Establishments: 3 3 3 2 2 2 2 2 2 2</td>
<td>-33.3%</td>
</tr>
<tr>
<td># of Employees: b b b b b b b b b</td>
<td>undetermined</td>
</tr>
<tr>
<td><strong>Western Maryland Region</strong></td>
<td></td>
</tr>
<tr>
<td># of Establishments: 24 21 23 20 19 17 20 19 19 16 15</td>
<td>-37.5%</td>
</tr>
</tbody>
</table>

\(^{14}\) The number of mining, quarry, and oil and gas extraction opportunities have also decreased in the Western Maryland region. The area has seen the continued loss of employers and employees over the last ten years from 2005-2015. The I68 Regional Economic Partnership Cluster Target Industry Study will serve the area in preparation for further effects of the loss of coal-industry jobs.
With its natural beauty and scenic landscapes, the Western Maryland region boasts many tourism attractions. Recreational opportunities exist at numerous state parks and forests in the region from Deep Creek Lake in Garrett County to Washington Monument State Park in Washington County. As the tourism industry helps to sustain the economy in the region, its growth across the state, has become recognized as an industry cluster.

This cluster includes but is not limited to adventure sports, natural resources, hiking, biking, camping, golf, gambling, fly fishing and historic attractions. The Adventure Sports curriculum is currently being taught at Garrett College and access to the Adventure Sports Center International facility nearby has increased interest in this growing field. Additionally, the improved biking and hiking trail known as the Great Allegheny Passage links Pittsburgh, PA to Cumberland, MD where it joins the C&O Canal towpath trail and continues directly to Washington DC. The traffic on this trail has increased substantially over the past few years spilling over to additional trails and trail development. The growth has aided in the emergence of many new bed and breakfasts and restaurants. The continued development of attractions and promotion and marketing is needed for this industry to grow. Small business and entrepreneurial efforts are encouraged as the recent survey demonstrated that 75.2% of respondents identify the region’s workforce is adequate to attract new business for the region in the area of tourism.

Tourism is not easily measured because it is not a single industry; it is a demand-side activity which affects multiple sectors to various degrees. Annually across the State, from county to county, visitor spending makes a significant impact and is an important revenue generator for state and local governments across the region.

Travel & Tourism Economy – The flow-through (direct, indirect, induced) effect of tourism.
Tourism spending supports thousands of jobs for the state’s citizens. The overall economic effect of tourism includes lodging, recreation, retail, real estate, air passenger transport, food & beverage, car rental, taxi services, travel agents, etc. With 146,012 direct full-time equivalency jobs in 2016, an increase of 3% from 2015, tourism ranked as the 12th largest employer in the State of Maryland. For the three western counties, the number of tourism related employees has increased annually since 2009. The region employs an average 4.9% of the state’s tourism jobs.

Statewide, Maryland hosted 34.6 million tourism related visitors in 2016, an increase of 4% over 2015. Garrett, Allegany, and Washington counties welcomed 5% of those visitors to Western Maryland. The region has averaged 5.2% of Maryland tourism visitors since 2009.

As noted in The Economic Impact of Tourism in Maryland Calendar Year 2016, visitor spending across the State (including indirect and induced impact), generated close to $2.4 billion in state and local taxes, this includes income taxes from the wages of industry employees, sales tax for tourism goods and services, hotel occupancy taxes, property taxes, and other corporate taxes and $2.1 billion in federal taxes. Total visitor spending for the tourism industry in 2016 was $17.3 billion.

More than 60% of visitor spending takes place in three industries – transportation, food & beverage, and lodging. The region has maintained nearly 3.7% of the state-wide industry spending while experiencing a 72.9% increase in visitor tourism related spending across the three counties from 2008 to 2016.

<table>
<thead>
<tr>
<th>Direct Tourism Consumption Taxes by Region 2008-2016</th>
<th>% change 2008-2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allegany</td>
<td>$3,316,103</td>
</tr>
<tr>
<td>Garrett</td>
<td>$2,206,564</td>
</tr>
<tr>
<td>Washington</td>
<td>$5,900,164</td>
</tr>
<tr>
<td>Western Region</td>
<td>$11,322,813</td>
</tr>
</tbody>
</table>

* Percent of State                     |                      | 3.87%    | 3.91%    | 3.90%    | 3.66%    | 3.64%    | 3.68%    | 3.69%    | 3.62%    | 3.58%    |

As noted in The Economic Impact of Tourism in Maryland Calendar Year 2016, visitor spending across the State (including indirect and induced impact), generated close to $2.4 billion in state and local taxes, this includes income taxes from the wages of industry employees, sales tax for tourism goods and services, hotel occupancy taxes, property taxes, and other corporate taxes and $2.1 billion in federal taxes. Total visitor spending for the tourism industry in 2016 was $17.3 billion.

Garrett, Allegany, and Washington counties have benefited from the increase of visitors to their respective areas as well as the visitor spending that has contributed directly to their local area businesses. The recent survey analysis significantly indicated strong support for the tourism industry and attracting new tourism related businesses across the region. Development of the existing tourism economy and introduction of additional drivers should be identified to sustain and stimulate these economic development opportunities.
Development of the CEDS 2018-2022 document included an online survey distributed throughout the three county region to assess the views of the community members on the opportunities and threats associated with the region’s economic growth and development. For the first time, respondents were asked to consider drug addiction issues as part of the survey. Respondents were given the opportunity to provide written, open responses expressing their opinion of the current drug addiction issue and its detriment to the region. Of the (R=464) comments the following were presented:

- 70.0% (R=325) indicated a major problem/very detrimental to the area; comparable to others areas across the state, nation, and Appalachia
- 7.5% (R=35) indicated a strain on (or lack of) limited resources/programs
- 6.7% (R=31) indicated an impact to all facets of the community; particularly the quality of the workforce

While the majority indicated an opinion, a significant number choose not to respond to specific questions that would rank the issue. Committee members reviewed the open responses to shed light onto why this was the case finding many recognizing the high national concern over the addiction/drug-related issues, yet indicating that public awareness for the region needs addressed.

Reflecting on these results, the CEDS committee chose to research, “Impact of Addiction Issues as Related to Economic Development in Western Maryland” to create greater awareness and consideration for this epidemic that impacts Western Maryland. The research is available at www.tccwmd.org.

Tri-County Council for Western Maryland’s Comprehensive Economic Development Strategy committee members plan to reach out to current task forces and workgroups from Allegany, Garrett, and Washington counties to encourage discussion of economic development as part of the healthcare crisis. As an economic development organization, Tri-County Council would raise awareness of the economic impact to the region’s workforce resulting from this epidemic. In its attempt to affect change, the CEDS committee would like to gain a seat at the table with these organizations to support communication throughout the region to combat workforce issues.

Resources for the report include:
Tri-County Council for Western Maryland CEDS Survey Executive Summary; Appalachian Regional Commission “Diseases of Despair in Appalachia;” Maryland Department of Health and Mental Hygiene Drug and Alcohol-Related Intoxication Deaths in Maryland 2016; Maryland Department of Health and Mental Hygiene Drug and Alcohol-Related Emergency Room Visits in Maryland 2008-2014; Maryland Department of Health Behavioral Health Administration The Overdose Response Program; Washington County Health Department; Project ACT NOW; Allegany County Health Department Behavioral Health Services; Prescribe Change Allegany County; and Garrett County Health Department Behavioral Health.
The Maryland Appalachian region consists of three counties and twenty-four municipalities. From the foothills of Washington County to the plateaus of Garrett County, it is a picturesque view of high peaks and fertile valleys. In the past, the eastern valleys saw high agricultural production, while the mountainous regions produced bituminous coal. Eventually, large manufacturers saw this prosperous region as an excellent location for their new business.

The geography of Western Maryland is very diverse spanning from the Blue Ridge to the Appalachian Plateau. The Blue Ridge section comprises the eastern most portion of the region in Washington County and represents the smallest portion of land. Moving further west is the ridge and valley section that comprises the largest portion in area and is characterized by steep slopes and valleys. The western most section is the Appalachian Plateau which includes all of Garrett County and a small portion of Allegany County. This area is most recently characterized as being rich in natural gas.

During the early 20th century, Western Maryland thrived as a transportation hub. The combination of the C & O Canal, National Road, and Baltimore and Ohio Railroad truly made Appalachian Maryland the "gateway to the west".

As highway systems became the preferred mode of transportation for industry, Western Maryland, and in particular, Allegany and Garrett Counties were left behind. Interstate highways became a critical factor for development and investment by company’s looking for fast, efficient modes of transport. Interstate 68 in Western Maryland was completed in August of 1991-almost thirty years after this vital infrastructure was planned for development. During this thirty-year period, Appalachian Maryland saw some of its biggest declines in employment and population and increased poverty levels. In 2018 a new segment of Route 219 North opened from Meyersdale, PA to Somerset, PA leaving only a short segment needed to connect Interstate 68 to Interstate 76. Once completed this should make the region far more attractive for development.

Over the years, several manufacturing companies in the region employed 1,500 or more people. Most of those companies are no longer here, and new plants of this size are few and far between. This decline in large manufacturing plants forced the region to diversify and they have grown because of that effort. Manufacturing is still a major part of the workforce today, but large companies today employ 300-500 people instead of 1,500, and a plant closing does not devastate the region as it once did. Other major industries of the past such as mining and agriculture are being supplemented with new and emerging tourism efforts, information technology related businesses and the sustainable energy industry. The highways that spark prosperity and growth today do not carry cars or trucks, but instead carry information, voice and data. Again, Western Maryland is behind in the development of this critical infrastructure to attract and retain businesses. Since new networks were completed in Fall 2013 and became available in Spring 2014, fiber has been installed across the region, through cooperation with the state of Maryland, to provide access to the majority of schools, libraries, public safety entities, and health care institutions. Fiber installation is still needed to connect several community anchor institutions. The region faces challenges reaching rural, remote areas. All three counties have adopted long term plans to increase access to broadband services to residential areas. While the benefits of broadband connectivity are not being fully realized by the overall region; Allegany, Garrett, and Washington counties are focused on and committed to bringing the much needed infrastructure and competition to the rural areas of Western Maryland.

The three counties of Western Maryland now suffer more from underemployment than unemployment and understand that technology related infrastructure and focusing on education and workforce training is the key to higher paying jobs, population growth and ultimately the building of a sustainable tax base.
The CEDS planning process involves conducting an analysis of economic problems and opportunities and addresses the region’s Economy, Population, Income, Unemployment, Geography, Workforce, Transportation, Education, Telecommunications, Health Care, and Water & Sewer Infrastructure. The goals and objectives outlined from this analysis are used to formulate the CEDS document. The Council strives to:

- **Become more competitive with other regions by leveraging the assets that make the region an attractive place to do business.** The competition for new businesses and employees in the region is no longer just a matter of competing locally. The region is preparing itself to compete world-wide by providing the infrastructure, training, and workforce needed to attract and retain employees and businesses.

- **Enhance the quality of technical school education in the region to provide a skilled workforce in targeted industry sectors.** Across the region this calls for the development of new schools with new technology and courses that are industry specific. Courses will continue to be created that will focus on technology based industry sectors such as computing, machinists, robotics, nursing, biotechnology, tourism, cyber-technology, biotechnology, autonomous technology, and renewable energy sources.

- **Increase incentives to locate a business in Western Maryland.** This includes expanding opportunities for Enterprise Zones or other incentives associated with such areas. Market hub zones to industries that can use them to their advantage when working with government contracting. Promote cyber-technology and biotechnology incentives for locating in the region as well as the manufacturer’s tax credit program.

- **Communicate and coordinate between counties in the region to ensure that businesses will not be lost to other areas in the Mid Atlantic.** The counties currently work with the state of Maryland on communication and coordination when dealing with new businesses entering the area. There is also a considerable amount of communication via the Tri-County Council’s role as Economic Development District. The individual county’s Economic Development Departments play a critical role on the projects and CEDS committees. Additionally, the I-68 Regional Economic Partnership Cluster Target Industry Study will include the development of a regional asset map, regional labor shed analysis, a target industry list and a county specific, as well as regional, list of recommendations. Data and maps will serve as resources for new and expanding companies to reference when looking to build, hire, or expand.

- **Provide the necessary tools for local businesses to remain viable.** To serve the needs of the business and entrepreneurial community, Tri-County Council provides technical assistance for companies to acquire professional services and training that will enhance their business and their opportunity for securing required financing.

- **Provide gap financing for business that cannot obtain needed financing from traditional sources.** Currently the Council has 11 distinct loan funds with the sole purpose of providing gap financing to small businesses to create or retain jobs in the region. Attempts to recapitalize this fund in any significant amount have occurred over the last several years with very limited success. The current funds available can sometimes be in high demand as credit is becoming harder to receive from commercial banks. The Council has a plan of action in place to try to increase available funding. The strategy is the process of consolidating the several EDA loan fund accounts into one account. While this action in itself does not increase capital, it puts in place an immediate tool to match other federal dollars should Congress eliminate the federal status of those funds which have already been revolved several times. The process includes working with legislators to de-federalize these loan funds which would allow matching for new federal dollars.

- **Ensure that the Small Business Development Center (SBDC) and Small Business Administration (SBA) provide adequate support for new businesses that are starting up as well as existing businesses that are struggling or growing.** The SBDC provides resources to small businesses in the form of financial projections, business plan support, and general counseling. Counselors are in place in Allegany, Garrett and Washington Counties. The Council encourages all businesses interested in our lending programs to work with the SBDC for guidance. The SBDC provides many training classes throughout the year in each county as well as working with SBA which also offers many training classes on their various programs including the SBA 504 loan guarantee programs.

- **Increase awareness of funding programs to the general public and financial institutions to promote more small business growth.** Many of the small businesses are not aware of how to access resources that are available to support their start-up and growth needs. The Council actively participates in many SBDC programs to highlight these programs. The Council markets our programs through the Chambers of Commerce, website, marketing kits, state communication and a direct relationship with area banks and their loan officers. The Council also provides technical assistance for companies to acquire professional services and training that will enhance their business and their opportunity for securing required financing.
Establishing Information Networks

The State of Maryland passed legislation in 2000 requiring all Maryland Counties to have Hazard Mitigation Plans adopted with updates every 5 years. The Council worked directly with the consultant to create the GIS maps that identified potential areas of hazard. We continue to keep on file the mitigation plans that are currently in effect. Garrett, Allegany, and Washington County Hazard Mitigation Plans are current and each county has indicated that updated Plans will be presented during 2018.

These plans continue to be the most comprehensive documents for responding to a disaster within the Tri-County region. The plans are designed to assess the entire county and provide mitigation strategies for any possible occurrence or threat. These documents remain on file at Tri-County Council and are utilized as the plan of action for Economic Resilience.

Pre-Disaster Recovery Planning

Through its Emergency Management Office, Garrett County has developed a network of trained agency and volunteer personnel through the Maryland MEMAC, a statewide mutual aid agreement to mitigate and respond to a variety of hazards. This network includes state agencies such as the Maryland State Police, Department of Natural Resources, Department of the Environment, Department of Health and Mental Hygiene, State Highway Administration and the Maryland Emergency Management Agency. County agencies include the Roads Department, Department of Public Utilities, Department of Planning and Land Development, General Services, Board of Education, the Community Action Agency, the Health Department, Department of Social Services and the Sheriff’s Office.

The county has mutual aid agreements with all surrounding counties and has also developed working relationships with volunteer organizations including the fire and rescue units that are active in incorporated communities and in rural areas. The County also has mutual agreements with the American Red Cross and other groups, such as the Allegany County HazMat team, that may be called upon in special circumstances. In addition, the county has agreements to coordinate mitigation activities with private utility companies, including Allegheny Power and Verizon and with private transportation companies such as CSX for rail transportation HazMat events.

Through its Department of Planning and Land Development, Garrett County has developed a system to regulate land use in sensitive areas, including 100-year floodplains, stream buffer areas, wetlands and steep slopes. The county also has subdivision regulations for the creation of new lots and a zoning ordinance for the Deep Creek Watershed. Each municipality has similar regulations that are administered through the county Department of Planning and Land Development.¹⁷

The Allegany County Department of Emergency Services strives to achieve and sustain core capabilities in support of emergency communications, preparedness, response and recovery initiatives. Our mission is to provide critical emergency services to our residents and visitors, which includes: Emergency Management; Emergency Medical Services in support of Volunteer EMS Response; Interoperable Radio Communications; Operation of the 911 Joint Communications Center; Public Education and Outreach; Special Operations / Hazardous Materials Incident Response.

Our Community, Our Responsibility - As a Department, we will: Strive to enhance the knowledge, preparedness and vigilance of the public, our employees and allied agencies through continued education, training and information sharing; Increase
The Washington County Emergency Management Office plays a different role during each of the four phases of emergency management: mitigation, planning, response, recovery. Before it was known as the Emergency Management Office it was known as Washington County Civil Defense.

Under the Disaster Mitigation Act of 2000, Washington County developed a local hazard mitigation plan. Mitigation involves both physical projects (such as elimination of construction in flood zones) and public education and community outreach efforts. The EM Office takes the lead in analyzing threats to the community. Working along with other agencies the EM Office develops a plan to address the most severe and frequent threats, protect critical infrastructure, and improve the overall safety of the community.

During the planning phase, the EM office staff uses the risk analysis undertaken during the mitigation phase to develop a series of plans: The Emergency Operations Plan (EOP), standard operating procedures (SOPs) and the Emergency Operations Center (EOC) manual. The EOP, which describes how the community’s resources will be organized and deployed in the event of a disaster, must be based on the National Incident Management System (NIMS).

During the response phase the EM office assures that the EOP is being followed. The EM staff has the overall responsibility for the smooth functioning of the EOC. The EOC is ready to support those who are responding to the disaster. The EOC, when activated, coordinates mutual aid if it is needed and keeps track of expenses incurred during the response phase.

During the recovery phase the EM office works with State and Federal agencies to obtain financial assistance under the Stafford Act and related state laws. This office provides the coordination of documentation on the disaster on the basis of EOC records, and works with departments involved in the response to obtain further documentation of reimbursable expenses.
Identification of Counties
Appalachian Maryland consists of the three western most counties of Allegany, Garrett and Washington. Historically these counties have thrived on a manufacturing base. It was this lack of diversity and geographic isolation that contributed to the economic decline over the years. The counties still rely heavily on manufacturing as a major industry sector but now the companies are much smaller. While a company leaving still has negative impacts on the community, the smaller size of most companies means the impact is not as devastating as it once was.

The Appalachian Regional Commission (ARC) has designated Allegany, Garrett, and Washington Counties as Transitional for FY2019.

Transitional counties are those transitioning between strong and weak economies. They make up the largest economic status designation. Transitional counties rank between the worst 25% and the best 25% of the nation’s counties.

Distressed Designation and County Economic Status Classification System, FY 2007 – FY 2019
The Appalachian Regional Commission (ARC) uses an index-based county economic classification system to identify and monitor the economic status of Appalachian counties. The system involves the creation of a national index of county economic status through a comparison of each county's averages for three economic indicators—three-year average unemployment rate, per capita market income, and poverty rate—with national averages. The resulting values are summed and averaged to create a composite index value for each county. Each county in the nation is then ranked, based on its composite index value, with higher values indicating higher levels of distress.

Allegany County, Maryland is designated as a transitional county in fiscal year 2019. The maximum ARC match rate for projects funded in the county is 50%. This county has 2 distressed areas in fiscal year 2019.
Garrett County, Maryland is designated as a transitional county in fiscal year 2019. The maximum ARC match rate for projects funded in the county is 50%. This county has 0 distressed areas in fiscal year 2019.
Washington County, Maryland is designated as a transitional county in fiscal year 2019. The maximum ARC match rate for projects funded in the county is 50%. This county has 4 distressed areas in fiscal year 2019.
The underlying Garrett year bachelor's institution Allegany County is Maryland's westernmost county with over 76,000 acres of parks, lakes, and publicly accessible forestland. According to the US Census Bureau, population has grown county-wide from 29,846 in 2000 to 30,097 in 2010. Projected population in 2020 is 30,300. The median age is 45.6 years. Of the 15,533 civilian labor force the unemployment rate is 5.5% with 24.7% of residents commuting outside the county to work.

The County is home to 7 elementary; 3 middle/combined; and 2 high schools enrolling 3,811 students. The student teacher ratio is 12.9:1. There are 8 nonpublic schools as well as the two-year institution Garrett College with an enrollment of 673 offering 150 degrees.

The high school graduation rate for ages 18 to 24 is 88.5% with 19.2% obtaining a bachelor's degree or higher. This trend continues with additional age groups; 89.4% of 25-34 year olds are high school graduates and 15.3% with bachelor's degree or higher; 94.8% of 35-44 year olds are high school graduates and 23.4% with bachelor's degree or higher; 91.5% of 45-64 year olds are high school graduates and 19.2% hold a bachelor's degree or higher.

Garrett County is home to six industrial/business parks strategically located throughout the County with access to major highways and underlying infrastructure. Incubator space is also available to new and technology-based businesses. Located at Garrett College, Garrett Information Enterprise Center serves as Business Incubator.

The county is accessible by MD Routes 135 and 495; US 40, US 50 and US 219; I-68; with access to/from I-70, I-79, I-81. Rail freight includes CSX Transportation. The area is served by the Port of Baltimore and Garrett County Airport.

Allegany County is situated in the heart of Western Maryland equidistant from Baltimore, Washington DC, and Pittsburgh. According to the US Census Bureau, population has grown county-wide from 74,930 in 2000 to 75,087 in 2010. Projected population in 2020 is 75,087. The median age is 41.2 years. Of the 32,427 civilian labor force the unemployment rate is 6.1% with 16.5% of residents commuting outside the county to work.

The County is home to 14 elementary; 4 middle; and 4 high schools enrolling 8,629 students. The student teacher ratio is 14.3:1. There are 11 nonpublic schools as well as the two-year institution Allegany College of Maryland with an enrollment of 2,685 offering 517 degrees and the four-year institution Frostburg State University with an enrollment of 5,396 offering 1,232 degrees.
The high school graduation rate for ages 18 to 24 is 89.1% with 18.0% obtaining a bachelor's degree or higher. This trend continues with additional age groups; 89.9% of 25-34 year olds are high school graduates and 17.9% obtain a bachelor's degree or higher; 91.3% of 35-44 year olds are high school graduates and 20.9% with bachelor's degree or higher; 91.4% of 45-64 year olds are high school graduates and 19.7% hold a bachelor's degree or higher.

 Allegany County is home to eight modern industrial parks located in the Cumberland and Frostburg areas. Sites include a variety of options including rail and fiber optic lines. Incentives are available within the county to enhance investment.

The county is accessible by I-68, US 40, and US 220. Transit in the county is available through the Allegany County Transit bus service. Rail freight includes CSX Transportation and Norfolk Southern Railway. Rail passenger service is available via Amtrak. The area is served by the Port of Baltimore and Cumberland Regional Airport.

Washington County is a major industrial and transportation hub in the Mid-Atlantic region. According to the US Census Bureau, population has grown county-wide from 131,923 in 2000 to 147,430 in 2010. Projected population in 2020 is 156,800. The median age is 40.6 years. Of the 76,939 civilian labor force the unemployment rate is 4.9% with 34.0% of residents commuting outside the county to work.

The county is home to 28 elementary; 8 middle/combined; and 8 high schools enrolling 22,595 students. The student teacher ratio is 15.6:1. There are 37 nonpublic schools as well as the two-year Hagerstown Community College with an enrollment of 4,058 offering 661 degrees.

The high school graduation rate for ages 18 to 24 is 86.9% with 20.1% obtaining a bachelor's degree or higher. This trend continues with additional age groups; 86.2% of 25-34 year olds are high school graduates and 18.6% with bachelor's degree or higher; 90.7% of 35-44 year olds are high school graduates and 25.9% with bachelor's degree or higher; 89.3% of 45-64 year olds are high school graduates and 20.8% hold a bachelor's degree or higher.

Washington County is home to approximately 20 business and industrial parks concentrated in the Hagerstown and Williamsport areas to ease access to I-70 and I-81. More than 2,178 acres are ready for development. Six million square feet of office, commercial, warehouse and manufacturing space is also available. State Enterprise Zones and Foreign Trade Zones are available within the county and provide incentives for investment. Located at Hagerstown Community College, Technical Innovation Center serves as Business Incubator.

The county is accessible by I-81, I-70, I-68, US 40, and US 11 highways. Rail freight includes CSX Transportation and Norfolk Southern Railway. The area is served by the Port of Baltimore and Hagerstown Regional Airport.\textsuperscript{21}
Brief Economic Facts by County:

**Garrett County**
- List of Top 20 Major Employers 2016
  - Garrett Regional Medical Center 455
  - Bolling Corporation/ Pillar Innovations 310
  - Garrett College 225
  - EPT Ski Properties/Wrap Resort 220
  - Goodwill Retirement Community 190
  - Courtyard 180
  - First United Bank 180
  - Garrett County Community Action Committee 180
  - Uno Chicago Grill/Athletech
  - Del/Garrett B Cinema 155
  - Appalachian Parent Assoc. 150
  - Pine Lodge Steakhouse/Smiley’s Funzone 150
  - Dennett Road Manor 145
  - Shelley Mtn Lake Vacations 130
  - Oakland Nursing & Rehab Center 115
  - Garrett Container Systems 110
  - Wood Products 100
  - Phoenix Technologies 95
  - Total Biz Fulfillment 95
  - Savage Services 80
  - SCI Technologies 75

** Allegany County**
- List of Top 20 Major Employers 2016
  - Western MD Health System 2200
  - Frostburg State University 1865
  - Hunter Douglas Northeast 165
  - Versa-Lake Mill 700
  - CSX Transportation 635
  - Allegany College of Maryland 550
  - American Woodmark 545
  - Rocky Gap Casino Resort 500
  - ACS 380
  - The Active Network 350
  - Websitely Store 325
  - Federal Correction Institute 305
  - BCT Group 250
  - CareFirst 230
  - Hamilton Telecommunications 195
  - Friends Aware 195
  - Y-Riverside Recreation Center 120

**Washington County**
- List of Top 20 Major Employers 2016
  - Meritus Health 2740
  - Cit 2100
  - First Data 215
  - Volvo Group 1300
  - FedEx Ground 1000
  - The Bowman Group 740
  - Hagerstown Community College 560
  - Merkle Response Management Group 543
  - Arc of Washington County 500
  - Direct Mail Processors 500
  - Brook Lane Health Services 485
  - Dar Foods 460
  - Staples 390
  - A.C. & T. 350
  - L器械 phoenix 335
  - Sierra Nevada 335
  - J/1 Industries 300
  - Thompson Gas 275
  - UPS 275
  - CertainTeed 255

**Labor Availability**

**Civilian Labor Force (2016 avg)**
- By County  | IMA*  
- Total civilian labor force | 15,533 | 97,162  
- Employment | 14,678 | 91,007  
- Unemployment | 855 | 6,155  
- Unemployment rate | 5.5% | 6.3%  

Residents commuting outside the county to work (2012-2016) 3,405 24.7%

*Labor Market Area includes: Garrett and Allegany counties, MD, Preston County, WV and Somerset County, PA

**Labor Availability**

**Civilian Labor Force (2016 avg)**
- By County  | IMA*  
- Total civilian labor force | 32,427 | 59,817  
- Employment | 30,464 | 56,300  
- Unemployment | 1,963 | 3,517  
- Unemployment rate | 6.1% | 5.9%  

Residents commuting outside the county to work (2012-2016) 4,752 16.5%

*Labor Market Area includes: Garrett and Allegany counties, MD, and Mineral County, WV

**Labor Availability**

**Civilian Labor Force (2016 avg)**
- By County  | IMA*  
- Total civilian labor force | 76,939 | 333,847  
- Employment | 73,189 | 324,138  
- Unemployment | 3,750 | 14,709  
- Unemployment rate | 4.9% | 4.3%  

Residents commuting outside the county to work (2012-2016) 22,418 34.0%

*Labor Market Area includes: Washington and Frederick counties, MD, Berkeley County, WV and Franklin County, PA

**Garrett County Municipalities**
- Accident
- Deer Park
- Friendsville
- Grantsville
- Kitzmiller
- Loch Lynn Heights
- Mountain Lake Park
- Oakland

**Allegany County Municipalities**
- Barton
- Cumberland
- Frostburg
- Lonconing
- Luke
- Midland
- Westernport

**Washington County Municipalities**
- Boonsboro
- Clearsping
- Funkstown
- Hagerstown
- Hancock
- Keedysville
- Sharpsburg
- Smithsburg
- Williamsport
Prioritized List of Projects

Methodology

Tri County Council of Western Maryland begins seeking projects in February of each year by holding a meeting with the Strategies Committee. Each of the three Western Maryland counties has appointed a Point of Contact for projects from their county; Allegany County Department of Economic and Community Development, Garrett County Economic Development, and Washington County Office of Community Grant Management. The initiatives are discussed and the procedure and timelines are set at this meeting for submission of projects to TCCWMD.

The County Point of Contact reaches out to the all of the government agencies, non-profit organizations, municipalities and educational institutions to solicit for possible projects for the upcoming federal fiscal year. The Council provides a format for a one-page project request that will contain a brief summary of the project as well as expected funding sources. These completed forms are generally submitted by a deadline in April to each individual County.

Once the Counties have evaluated the projects that have been submitted to them and determined which projects are eligible for funding, the projects are prioritized based upon a matrix. The matrix for ranking is different in each county but generally consists of degree of need, project evaluation, scope of work, readiness to move forward and cost effectiveness with the hope that there is some outcome of leveraged private investment. Due to funding and other issues, these are not the only criteria the county uses and all county rankings can be subject to change based upon a public vote from the commissioners.

Once a ranked list of projects is voted upon, it is submitted to TCCWMD for consideration to be included in the annual list of projects. The lists from all three counties are then formulated into one complete listing of projects that are in a regional prioritized order. This list is then voted upon by the full TCCWMD board of directors for submittal to the Economic Development Administration.

Performance Measures

The Council anticipates there will be at least 50 jobs created or retained as a result of the investment based on the outcomes of the Revolving Loan Fund. In addition, there will be $1,000,000 in private investment achieved. The majority of investments are anticipated to be in small to medium sized businesses as tracked through the revolving loan fund. As banks are less likely to fund entire projects in the economic climate, the Revolving Loan Fund is seeing a large increase in activity.

The Unemployment levels in the region have stabilized and even dropped but it is uncertain where the economy is going in the near future. It is anticipated that this will directly affect population figures for the region which has stabilized over the past decade. As work becomes harder to find, it is not hard to anticipate that people will relocate in order to find employment. Due to the rural nature of the area, many of the measurables are simply estimates between the ten year censuses. The 2010 population figures show a slight increase in the population for the region but overall very little change with the exception of the areas just outside the urban corridor.

Complete performance measures of the projects in the region are categorized on the annual GPRA form that is submitted to EDA at the end of the calendar year.

Prioritized Projects List FY 2019 (next page)
## AREA DEVELOPMENT PROJECTS

<table>
<thead>
<tr>
<th>PROJECT NAME</th>
<th>CO</th>
<th>ARC</th>
<th>Other Federal</th>
<th>State/Local</th>
<th>Private</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>NR Consolidated Technical Assistance Program (CTA)</td>
<td>Multi</td>
<td>$175,000</td>
<td>$0</td>
<td>$175,000</td>
<td>$0</td>
<td>$350,000</td>
</tr>
<tr>
<td>1 Chautauqua Park West</td>
<td>Garrett</td>
<td>$183,000</td>
<td>$2,661,000</td>
<td>$800,000</td>
<td>$0</td>
<td>$3,644,000</td>
</tr>
<tr>
<td>2 Furnishings &amp; Theatrical Equipment Phase I – The Maryland Theatre Expansion</td>
<td>Washington</td>
<td>$250,000</td>
<td>$0</td>
<td>$8,500,000</td>
<td>$4,500,000</td>
<td>$13,250,000</td>
</tr>
<tr>
<td>3 Locust Grove Pumping Station Replacement – Phase I</td>
<td>Allegany</td>
<td>$400,000</td>
<td>$7,800,000</td>
<td>$2,926,000</td>
<td>$0</td>
<td>$11,126,000</td>
</tr>
<tr>
<td>4 Job Readiness and Transportation Programs – Horizon Goodwill</td>
<td>Allegany</td>
<td>$25,000</td>
<td>$0</td>
<td>$106,040</td>
<td>$0</td>
<td>$131,040</td>
</tr>
<tr>
<td>5 Community Education Center – Garrett College</td>
<td>Garrett</td>
<td>$275,000</td>
<td>$3,510,000</td>
<td>$11,685,000</td>
<td>$0</td>
<td>$15,470,000</td>
</tr>
<tr>
<td>6 Inflow &amp; Infiltration Upgrade - Town of Clear Spring</td>
<td>Washington</td>
<td>$30,000</td>
<td>$0</td>
<td>$30,000</td>
<td>$0</td>
<td>$60,000</td>
</tr>
<tr>
<td>7 Active Learning Labs – George’s Creek, Westernport, and Flintstone Elementary</td>
<td>Allegany</td>
<td>$75,000</td>
<td>$0</td>
<td>$75,000</td>
<td>$0</td>
<td>$150,000</td>
</tr>
<tr>
<td>8 Do the LOOP – Otto Lane to New Germany Trail Segment</td>
<td>Garrett</td>
<td>$100,000</td>
<td>$0</td>
<td>$340,000</td>
<td>$0</td>
<td>$440,000</td>
</tr>
</tbody>
</table>
## AREA DEVELOPMENT PROJECTS

<table>
<thead>
<tr>
<th>PROJECT NAME</th>
<th>CO</th>
<th>ARC</th>
<th>Other Federal</th>
<th>State/Local</th>
<th>Private</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>9 Western Maryland Non-Profit Professional Development Opportunities (PDOP)</td>
<td>Washington</td>
<td>$9,121</td>
<td>$0</td>
<td>$24,656</td>
<td>$0</td>
<td>$33,777</td>
</tr>
<tr>
<td>10 STEM / Robotics Lab Upgrade – Bishop Walsh School</td>
<td>Allegany</td>
<td>$20,000</td>
<td>$0</td>
<td>$20,000</td>
<td>$0</td>
<td>$40,000</td>
</tr>
<tr>
<td>11 Washington County Public Schools “Creating Computational Thinkers”</td>
<td>Washington</td>
<td>$160,000</td>
<td>$0</td>
<td>$160,000</td>
<td>$0</td>
<td>$320,000</td>
</tr>
<tr>
<td>12 Tackling the Opioid Epidemic – Allegany College of Maryland</td>
<td>Allegany</td>
<td>$25,000</td>
<td>$0</td>
<td>$25,000</td>
<td>$0</td>
<td>$50,000</td>
</tr>
<tr>
<td>13 Allied Health Program Enhancement – Allegany College of Maryland</td>
<td>Allegany</td>
<td>$40,000</td>
<td>$0</td>
<td>$40,000</td>
<td>$0</td>
<td>$80,000</td>
</tr>
<tr>
<td>14 Adventure Capital Welcome Conference</td>
<td>Garrett</td>
<td>$25,000</td>
<td>$0</td>
<td>$5,000</td>
<td>$20,000</td>
<td>$50,000</td>
</tr>
</tbody>
</table>

<p>| Total                                                                       | $1,792,121  | $13,971,000 | $24,911,696 | $4,520,000 | $45,194,817 |</p>
<table>
<thead>
<tr>
<th>PROJECT NAME</th>
<th>CO</th>
<th>ARC</th>
<th>Other Federal</th>
<th>State/ Local</th>
<th>Private</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Keyser’s Ridge Business Park Local Access Road – Phase 3</td>
<td>Garrett</td>
<td>$580,000</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$580,000</td>
</tr>
<tr>
<td>2 Frostburg Gateway Enhancement Project at Braddock Road – Phase 2</td>
<td>Allegany</td>
<td>$1,500,000</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$1,500,000</td>
</tr>
<tr>
<td>3 Glendale Local Access Road – Combined Phase 2A and 2B</td>
<td>Garrett</td>
<td>$420,000</td>
<td>$500,000</td>
<td>$0</td>
<td>$0</td>
<td>$920,000</td>
</tr>
<tr>
<td>4 Eastern Boulevard Expansion Phase I</td>
<td>Washington</td>
<td>$1,000,000</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>5 Eastern Boulevard Expansion Phase II</td>
<td>Washington</td>
<td>$1,000,000</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>6 Crayton Boulevard Expansion Phase II</td>
<td>Washington</td>
<td>$1,000,000</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>7 Professional Court Widening</td>
<td>Washington</td>
<td>$500,000</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$500,000</td>
</tr>
<tr>
<td>8 Warrior Boulevard Phase I - Town of Boonsboro</td>
<td>Washington</td>
<td>$1,000,000</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>9 Route 11 Mill &amp; Overlay Project - Town of Williamsport</td>
<td>Washington</td>
<td>$300,000</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$300,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>$7,300,000</td>
<td>$500,000</td>
<td>$0</td>
<td>$0</td>
<td>$7,800,000</td>
</tr>
</tbody>
</table>
The following is Maryland’s integration of its objectives and strategies to further the region’s goals:

**Investment Goal 1: Economic Opportunities – Invest in entrepreneurial and business development strategies that strengthen Appalachia’s economy**

State Objective 1.1: Stimulate growth of the region’s businesses through development of technology resources.

- **State Strategy 1.1.1:** Develop educational programs that support new technology development in the region.
- **State Strategy 1.1.2:** Work with the region’s higher education institutions to develop new programs that support new technology.
- **State Strategy 1.1.3:** Provide startup funding through RLF programs for development of new technology related industry in the region.
- **State Strategy 1.1.4:** Provide the infrastructure to support the development of new technology related industry in the region.

State Objective 1.2: Increase international exports from the ARC region.

- **State Strategy 1.2.1:** Provide assistance to local companies’ exports efforts through a regional export assistance office.

State Objective 1.3: Carry on a comprehensive economic development planning effort for the region.

- **State Strategy 1.3.1:** Develop and maintain economic development plans.
- **State Strategy 1.3.2:** Implement Sustainable Communities planning initiatives in order to enhance and maintain job creation and economic growth.

State Objective 1.4: Stimulate development of the central business districts of the region’s municipalities and support projects, which will enhance the long-term development of the CBD areas.

- **State Strategy 1.4.1:** Develop projects that encourage the reuse and/or the redirection of the use of downtown areas.
- **State Strategy 1.4.2:** Provide the necessary infrastructure for reuse and/or redirect the use of downtown areas.

State Objective 1.5: Continue to support business expansions, start-ups and entrepreneurship.

- **State Strategy 1.5.1:** Provide assistance to the region’s entrepreneurs through the use of the district’s RLF program.
- **State Strategy 1.5.2:** Support the region’s entrepreneurs through procurement assistance programs.
- **State Strategy 1.5.3:** Support the region’s entrepreneurs through the SBDC and other state programs.
- **State Strategy 1.5.4:** Support programs that do not duplicate existing services but that fill gaps in the existing entrepreneur network.
- **State Strategy 1.5.5:** Develop programs that will assist in the training or enabling of the region’s entrepreneurs to market and do business development on an international level.
- **State Strategy 1.5.6:** Develop advisory and training programs, as well as networking and "roundtable" opportunities for the region’s entrepreneurs.

State Objective 1.6: Stimulate smart growth and neighborhood conservation by encouraging the development of the central business districts of the region’s municipalities and support projects which will enhance the long-term development of the CBD areas.

- **State Strategy 1.6.1:** Development of comprehensive planning.
- **State Strategy 1.6.2:** Development of downtown planning documents.
- **State Strategy 1.6.3:** Develop projects that encourage the reuse and/or the redirection of the use of downtown areas.
State Objective 1.7: Increase the number of marketable industrial sites within all three counties including the conversion and rehabilitation of vacant industrial facilities.

State Strategy 1.7.1: Provide the basic infrastructure to new industrial sites and rehabilitate vacant industrial facilities.

State Strategy 1.7.2: Utilize “Energy Efficient Efforts” when possible in the provision of infrastructure.

Investment Goal 2: Ready Workforce – Increase the education, knowledge, skills, and health of residents to work and succeed in Appalachia

State Objective 2.1: Continued viability of health network as a regional medical center.

State Strategy 2.1.1: Include the medical community in the development of modern telecommunications network.

State Objective 2.2: Creation of a regional medical telecommunication network capable of providing medical diagnostics to the service areas small hospitals and clinics.

State Strategy 2.2.1: Connect the medical communities in nearby states to the Western Maryland telecommunication network.

State Objective 2.3: Facilitate local medical provider’s access for diagnostics and training to neighboring major medical centers through a modern communications network.

State Strategy 2.3.1: Connect the Western Maryland telecommunication network to the nearby major medical centers.

State Objective 2.4: Appalachian high school students will have access to both school-to-work and postsecondary education compatible with real-world needs, technology applications, and academic preparation.

State Strategy 2.4.1: Work with local business to create a valuable school-to-work transition program.

State Strategy 2.4.2: Work to create programs directed toward postsecondary access and success.

State Objective 2.5: The percentage of Appalachian workers receiving advanced skills training will equal or exceed the national average.

State Strategy 2.5.1: Increase the region's emphasis on science, math, and engineering programs.

State Strategy 2.5.2: Development of new educational programs that will lead to the development of the new skills necessary in the 21st century.

State Strategy 2.5.3: Provide continuing education training in advanced skills to the regions workers.

State Strategy 2.5.4: Work with local businesses to develop programs that will encourage workers to take advantage of post-secondary education programs.

State Objective 2.6: All Appalachian counties will equal or exceed the national average for enrollment in post-secondary education.

State Strategy 2.6.1: Encourage academic competition between the regions post-secondary educational institutions.

State Strategy 2.6.2: Increase the region’s employment opportunities for college educated personnel.

State Strategy 2.6.3: Increase emphasis on technical employment opportunities.

State Strategy 2.6.4: Development of new career programs in science and engineering.

State Strategy 2.6.5: Development of graduate degree opportunities locally, either by offering advanced degrees through existing institutions or through remote classroom programs.

Investment Goal 3: Critical Infrastructure – Invest in critical infrastructure – especially broadband; transportation, including the Appalachian Development Highway System; and water/wastewater systems

State Objective 3.1: Continue the development of a modern communications network that includes voice, data, and video and provide the native human resources necessary to maintain these networks.
State Strategy 3.1.1: Provide the basic infrastructure necessary for the public sector to develop and maintain a communication network.

State Objective 3.2: Increase the supply, choice, and condition of Appalachian Maryland's housing stock in order to meet the housing demands of current and future residents, thereby making the area more attractive to retention, expansion, and recruitment of business and industry.

State Strategy 3.2.1: Preserve the existing housing stock available to low and moderate income residents.

State Strategy 3.2.2: Increase the degree of homeownership affordable by low and moderate-income residents.

State Strategy 3.2.3: Increase the supply, choice and condition of Appalachian Maryland's housing stock.

State Strategy 3.2.4: Stimulate and assist with the production of Housing for low and moderate income residents.

State Objective 3.3: Develop a balanced transportation system, which is supportive of economic growth and investment potential in the region.

State Strategy 3.3.1: Development of a north-south transportation network in the region.

State Strategy 3.3.2: Improve secondary and local access highways and roads that will support primary highway development and yield an integrated network of road transit in the region.

State Strategy 3.3.3: Increase the region's rail service capacity to meet potential increase in demand and to facilitate continuing industrial development.

State Strategy 3.3.4: Upgrade the region's airports to compliment future development and increase marketing support for air service.

State Strategy 3.3.5: Improve or provide access to recreational, health, or educational facilities.

State Objective 3.4: Support a viable system of public transportation.

State Strategy 3.4.1: Develop planning studies for public transportation.

State Strategy 3.4.2: Develop planning studies which incorporate walkable community strategies and consideration for bike paths.

State Objective 3.5: Provide required access to key industrial or commercial centers.

State Strategy 3.5.1: Transportation investments that will create or maintain employment opportunities in the region, such as projects that create access to an industrial park or area, strengthen city business district access, or upgrade multi-modal access to or from transportation facilities.

State Strategy 3.5.2: Support studies to increase use of public transit.

State Strategy 3.5.3: Support transportation studies that will help to revitalize or alleviate problems in downtown commercial areas.

State Objective 3.6: Improve and Develop modern water and wastewater systems.

State Strategy 3.6.1: Provide basic infrastructure to industrial, commercial, recreational, and housing sites.

State Strategy 3.6.2: Develop and improve water systems to ensure that business development and residents have safe and healthy water for consumption.

State Strategy 3.6.3: Develop and improve wastewater systems to ensure the proper disposal of waste.

State Strategy 3.6.4: Develop and implement a combined storm water overflow system to ensure compliance with state and federal regulations.
**Investment Goal 4: Natural and Cultural Assets – Strengthen Appalachia’s community and economic development potential by leveraging the Region’s natural and cultural heritage assets**

**State Objective 4.1:** Increase employment and sales in the travel and heritage tourism industry, particularly in the areas of outdoor recreation, convention attractions, and historical interest.

- **State Strategy 4.1.1:** Support regional marketing programs for the travel and tourism industry.
- **State Strategy 4.1.2:** Support the development of heritage tourism products linked to state and national byway and heritage area efforts.

**Investment Goal 5: Leadership and Community Capacity – Build the capacity and skills of current and next-generation leaders and organizations to innovate, collaborate, and advance community and economic development**

**State Objective 5.1:** Enhance the capacity of local municipalities to plan for economic development and the needs of Western Maryland citizens.

- **State Strategy 5.1.1:** Develop and maintain programs that will train residents of the region in economic development.
- **State Strategy 5.1.2:** Develop and maintain economic development plans.

**State Objective 5.2:** Provide training opportunities to enhance the leadership skills of local officials and private nonprofit groups tasked with providing services to the community.

- **State Strategy 5.2.1:** Development of programs that provide training in leadership development.
- **State Strategy 5.2.2:** Development of programs that provide management skills to non-profit organizations.

**State Objective 5.3:** Enhance and strengthen the communication capability of non-profit and government organizations.

- **State Strategy 5.3.1:** Develop and maintain a modern telecommunications network.
- **State Strategy 5.3.2:** Monitor the effects upon the region caused by the deregulation of telecommunications.

**State Objective 5.4:** Develop skills necessary to promote collaborative partnerships among government.

- **State Strategy 5.4.1:** Sponsor groups, meetings, workshops and retreats that provide opportunities for intergovernmental cooperation.

**State Objective 5.5:** Provide training, which emphasizes the roles and responsibilities of being an effective board member.

- **State Strategy 5.4.1:** Sponsor programs on effective board membership and their responsibilities.
Sources:

1 Prepared by Maryland Department of Planning from U.S. Census Bureau population estimates, March 2017
2 The Great Recession’s official starting and ending dates are December 2007 through June 2009
3 Prepared from U.S. Census Bureau 2000; factfinder.census.gov
4 U.S. BLS Labor Statistics and DLLR www.dllr.state.md.us/lmi/laus June 2018
5 Maryland Department of Planning, US BEA Wage and Salary Jobs Data (CA-25N) November 2017
6 Online CEDS Survey Executive Summary, Addendum A1
8 Gov. Hogan Announces Funding for Frostburg State University Office of Regional Development and Engagement www.frostburg.edu/news/
9 Appalachian Maryland State Implementing Strategy Statement and Investment Program FFY2018
10 Maryland Department of Commerce Brief Economic Facts 2018; DLLR Office of Workforce Information and Performance
11 Prepared from Maryland Department of Planning, August 2016; US Census Bureau 2001, 2006, 2014 County Business Patterns
12 Mountain Maryland Tech Network www.facebook.com/groups/MountainMDTechNetwork/about/
13 NACo Analysis of U.S. Energy Information Administration Data 2013
14 Appalachian Regional Commission www.arc.gov/funding/POWER.asp
15 Appalachian Coal Industry, Power Generation and Supply Chain, ARC, March 2016
16 Maryland Tourism Development Board, The Economic Impact of Tourism in Maryland, 2016
17 “Impact of Addiction Issues as Related to Economic Development in Western Maryland,” Addendum All
18 Garrett County Emergency Management Office www.garretcountyc comprise/emer gency-services/home
19 Allegany County Department of Emergency Services gov.allconet.org/168/Emergency-Services
20 Washington County Emergency Management Office www.washco-md.net/EmergencyServices/eman_home.shtm
21 Appalachian Regional Commission County Economic Status and Distressed Areas in Appalachia www.arc.gov
22 Appalachian Regional Commission County Economic Status and Distressed Areas in Appalachia www.arc.gov
23 Maryland Department of Commerce Brief Economic Facts 2018; American Community Survey Educational Attainment, 2012-2016