



# **Comprehensive Economic Development Strategy 2023-2027**

for the Tri County Council for Western Maryland Economic Development District  
Allegany, Garrett, and Washington Counties, Maryland  
November 30, 2022

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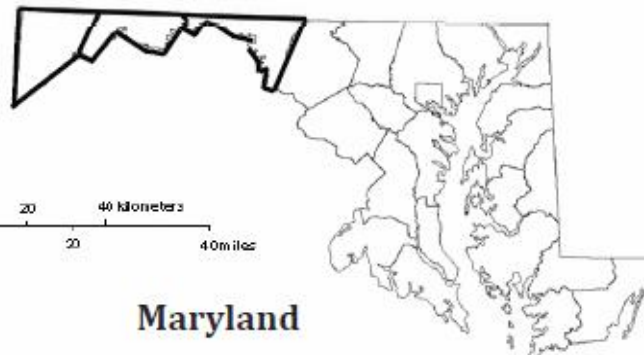
Tri County Council for Western Maryland, Inc. (TCCWMD) is a local Development District serving a three-county region in Appalachian Maryland.

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.



Western Maryland



0 20 40 kilometers  
0 20 40 miles

Maryland



Tri County Council  
*For Western Maryland*

**Comprehensive Economic Development Strategy**  
2023-2027  
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 will serve as the five-year plan for the period 2023-2027.

The Council was formed in 1971 and has been supported by the 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 the 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 program 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.



## Summary of Existing Conditions and Background

Appalachian Maryland is not that different from the majority of Appalachia. Like any rural areas 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 change 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 manufacturers 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.

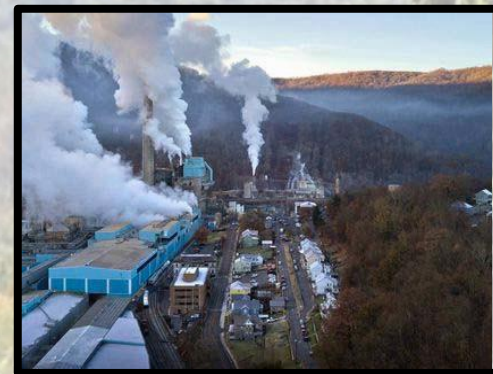
Over the years, several manufacturing companies in the region employed 1,500 or more people. Most of those companies are no longer here, and new plants of this size are few and far between. This decline in large manufacturing plants forced the region to diversify and they have grown because of that effort.

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 as being supplemented with new and emerging tourism efforts, information technology, cyber-security, autonomous technology, biotechnology, the sustainable energy industry and related businesses.

The 2019 decision by Verso Corporation to close the Luke Paper Mill in Luke, Maryland (Allegany County) due to a challenging global paper market affected the region. The mill operated in Allegany County for 131 years and was considered one of the larger employers. The closing meant 675 employees from across the region lost their jobs. This number does not include the additional businesses affected by the closure including the timber industry and trucking industry, as well as the economic loss to local restaurants, shops, and ancillary businesses.

In early 2020, the newly completed Western Maryland Works Makerspace, in partnership with Allegany College of Maryland Continuing Education & Workforce Development Industrial Manufacturing program, began to provide workforce training in machining, welding, and industrial maintenance. Displaced workers from the Luke Paper Mill became the first trainees to participate in the program and receive industry-recognized certification to secure mid-to-high level manufacturing jobs.

Mid 2020 the announcement was made by Corsa Coal Corporation that nearly 40 employees at its Casselman Mine near Grantsville, Maryland (Garrett County) were being laid off. Company officials noted the layoffs coincided with a reduction in coal production and noting that both domestic and export markets for metallurgical coal had deteriorated, in part because of the COVID-19 pandemic.



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 connectivity are not being fully utilized by the overall region and continues to be identified as a top regional issue hindering development. There are still parts of the entire region that have very limited connectivity. The issue is now in the forefront with the majority of educational institutions forced to provide virtual learning due to the COVID-19 pandemic as well as employers offering telework opportunities.

Tackling this issue, the Governor's Office of Rural Broadband awarded grant assistance to increase internet access for Maryland public school students in August 2020. In urban areas, where students have access to broadband infrastructure, the grant was used to help unserved students obtain internet services. In rural areas where broadband infrastructure does not exist, the grant provided wireless access to student via cellular hotspots or similar resources. Grant for unserved students in the Western Maryland region were awarded to Allegany County (\$70,000), Garrett County (\$185,000), and Washington County (\$172,935).

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 4.8 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).

Both the region and the State were slowly recovering from the Great Recession. However, in early 2020, the region, state, and nation were impacted by the Coronavirus (COVID-19) Pandemic, with unemployment plummeting to new lows. In April, historic rates were reported across the country. Rates were 9.8% for Maryland; 13.2% for Allegany County, 12.4% for Garrett County, and 11.4% in Washington County. By June, Marylanders were beginning to return to work under Governor Larry Hogan's Maryland Strong Roadmap to Recovery Plan. <https://governor.Maryland.gov/recovery/>

Coronavirus Disease 2019 (COVID-19) is a disease caused by a respiratory virus first identified in Wuhan, Hubei Province, China in December 2019. As described by the Center for Disease Control and Prevention, most people have a wide range of symptoms from mild to severe appearing 2-14 days after exposure to the virus. Symptoms may include: fever or chills, cough, shortness of breath or difficulty breathing, fatigue, muscle or body aches, headache new loss of taste or smell, sore throat congestion or runny nose, nausea or vomiting and diarrhea.

The vast majority of people recover from this infection. Older adults and those with pre-existing severe medical conditions like heart or lung disease or diabetes seem to have a greater risk for developing more serious complications from the illness. Worldwide, COVID-19 has resulted in thousands of infections, causing illness and in some cases death. Cases spread to countries throughout the world with more cases still being reported; defining COVID-19 as a Pandemic. While more is learned each day, there is still a lot that is unknown about COVID-19 and the virus that causes it. The CDC and local officials continue to provide the best available information to date.

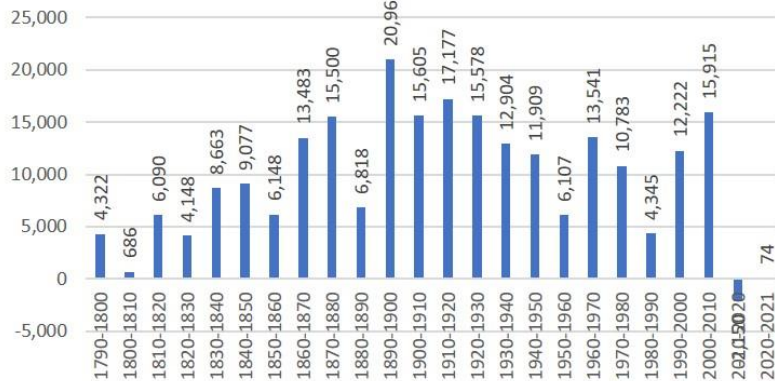
Every type of business and industry including manufacturing, hospitality and accommodations, health care, energy and their employees were affected by COVID-19. Programs from the national, state, and local level were developed to help to meet the challenges being faced.



## Demographic History

### 1. Population

Chart 1. Total Population Change in Western Maryland Region



The population of the Western Maryland Region has grown in every decade except the most recent one. (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%, falling to an estimated 4.2% by July 2021.<sup>1</sup>

Chart 2. Western Region Population as a Percent of Total Maryland Population

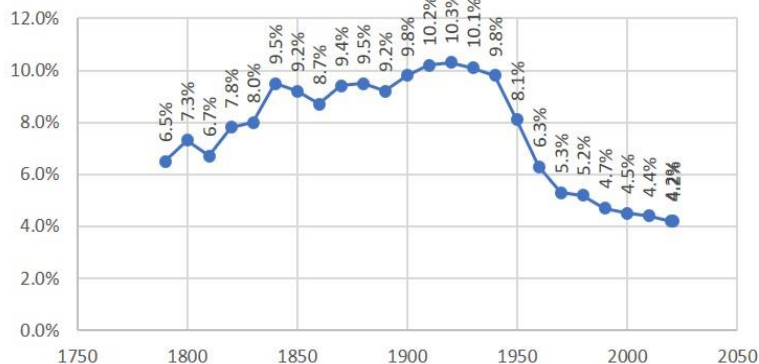


Table 1. Total Population Estimates, 2010 through 2021												
I. Total Population	7/1/2010	7/1/2011	7/1/2012	7/1/2013	7/1/2014	7/1/2015	7/1/2016	7/1/2017	7/1/2018	7/1/2019	7/1/2020	7/1/2021
MARYLAND	5,788,099	5,843,115	5,891,680	5,932,654	5,970,245	6,000,561	6,024,752	6,052,177	6,042,718	6,045,680	6,055,802	6,165,129
WESTERN MARYLAND REGION	252,831	252,831	252,973	252,603	251,777	251,112	251,348	251,426	251,064	250,479	250,055	251,368
Allegany County	74,977	74,977	73,962	73,604	73,045	72,498	72,194	71,615	70,975	70,416	70,057	67,729
Garrett County	30,130	30,130	29,954	29,954	29,635	29,416	29,344	29,233	29,163	29,014	28,852	28,702
Washington County	147,724	147,724	149,057	149,045	149,097	149,198	149,810	150,728	150,926	151,049	151,146	154,937
II. Change in population	7/1/2009-7/1/2010	7/1/2010-7/1/2011	7/1/2011-7/1/2012	7/1/2012-7/1/2013	7/1/2013-7/1/2014	7/1/2014-7/1/2015	7/1/2015-7/1/2016	7/1/2016-7/1/2017	7/1/2017-7/1/2018	7/1/2018-7/1/2019	7/1/2019-7/1/2020	7/1/2020-7/1/2021
MARYLAND	57,711	55,016	48,565	40,974	37,591	30,316	24,191	27,425	9,459	2,962	10,122	-7,550
WESTERN MARYLAND REGION	632	640	-504	-370	-826	-665	236	228	-512	-585	-424	74
Allegany County	-124	-392	-623	-358	-559	-547	-304	-579	-640	-559	-359	-218
Garrett County	-15	1	-183	0	-319	-219	-72	-111	-70	-149	-162	-59
Washington County	771	1,031	302	-12	52	101	612	918	198	123	97	351
Change in Western MD Region as a Pct of MDPopChange	1.1%	1.2%	-1.0%	-0.9%	-2.2%	-2.2%	1.0%	0.80%	-5.4%	-19.8%	-4.2%	0.0%

While the total numeric gain of the Region during the 2000 and 2010 census period was the largest since the 1920s, two trends are evident when looking at the data annually through the decade as well as the post census estimates through 2021. The first is the majority of all growth in the Western Maryland Region occurred in Washington County. 62% of the region's population resides in Washington County as of June 2021 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<sup>2</sup> and which continues through today. Table 1 illustrates the annual population estimates for the Region and the three counties from 2010 to 2021.<sup>1</sup>

Washington County had substantial growth through 2012 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 2021. While Allegany and Garrett have experienced population declines; the entire Western Maryland region has experienced a loss in population since 2010. According to June 2021 population estimates, the change in Western Maryland region as a percent of Maryland's population change, a net 0.0% is recorded.



## 2. Income

Median household income for the Western Maryland Region has been and remains significantly below statewide figures. In the 2021 period, the median household income for the Western Maryland Region was nearly two-thirds (62.4%) of the statewide median (\$90,203).<sup>3</sup> (See Table 2) However, there is also a difference within the Region, with the median income of Washington County (\$65,367) significantly above that of Allegany (\$48,888) and Garrett (\$54,542) counties. The median incomes of the latter two counties are in order of 54 to 60 percent of the statewide median while Washington county's median is nearly three-quarters of the state.

**Table 2. Median Household Income**

	<u>2021</u>	<u>1999</u>	<u>Change</u>	<u>2021</u> <u>% of Maryland</u>	<u>1999</u> <u>% of Maryland</u>
Maryland	\$90,203	\$73,911	\$16,292		
Western Maryland Region	\$56,266	\$48,314	\$7,952	62.4%	65.4%
Allegany	\$48,888	\$43,089	\$5,799	54.2%	58.3%
Garrett	\$54,542	\$45,070	\$9,472	60.5%	61.0%
Washington	\$65,367	\$56,784	\$8,583	72.5%	76.8%
Prepared from U.S. Census Bureau, American Community Survey 1 Year Estimates, 2021 release					

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. Maryland's median household income increased by 18.1 percent between 1999 and the 2021 period. The improvement for the Western Maryland Region continued at \$7,952 (14%). While each county remains below the state-wide average, data indicates that counties have increased over their 1999 averages. Median household income in Garrett County continues to show the largest average improvement in the region over 1999 with a median income of \$4,542 during the 2021 period.<sup>3</sup>

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 the 2021 period, income has slowly improved. As a result, Western Maryland's median income for the 2021 period was well above the 1999 level.

### 3. Unemployment

Unemployment rates rose with the Great Recession and have been slowly coming back down, both in the Western Maryland region and the State as a whole. However; before, during, and after the Great Recession, Western Maryland unemployment rates remained stubbornly higher than statewide averages. In 2007, before the recession, the state unemployment rate was 3.5% compared to 5.1% in Allegany County, 4.4% in Garrett County, and 4.3% in Washington County. Following the recession in 2009, the state unemployment rates was 7.0% compared to 8.5% in Allegany County, 7.8% in Garrett County and 9.7% in Washington County. In general, the Western Maryland region was hit harder than the state with unemployment rates rising 4.8 percentage points compared to 4.2 percentage points increase for the state. At the end of 2019, the state and region had slowly begun to rebound from the recession and saw rates similar to those of 2007.

In early 2020, the region, state, and nation were impacted by the Coronavirus (COVID-19) Pandemic with unemployment plummeting to new lows. In April 2020, historic rates were reported across the nation with 302,569 unemployed in Maryland, the unemployment rate stood at 9.8%. The region reported 14,066 unemployed with an average unemployment rate of 12.3%.

Since that time to June 2021, the workforce has seen a slight return of employment. According to the Office of Workforce Information and Performance Monthly Labor Review, the U.S. Department of Labor's Bureau of Labor Statistics (BLS) indicated Maryland with 210,325 unemployed in June 2021 compared to 267,300 unemployed in June 2020. The Western Maryland region reports 7,912 unemployed as opposed to 10,204 during June 2020; with 2,297 in Allegany County, 916 in Garrett County, and 4,699 in Washington County.

**Table 3. Annualized Unemployment Rates<sup>4</sup>**

	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
Maryland	7.7%	7.2%	7.0%	6.6%	5.8%	5.1%	4.3%	3.8%	3.5%	3.0%	8.3%	6.7%
Western Maryland Region	9.4%	8.8%	8.3%	8.0%	7.1%	6.3%	5.5%	5.0%	4.5%	4.1%	8.5%	6.7%
Allegany County	9.3%	9.1%	8.9%	8.5%	7.6%	7.0%	6.1%	5.5%	4.9%	4.5%	9.7%	7.4%
Garrett County	8.9%	8.4%	8.3%	8.1%	7.1%	6.3%	5.5%	5.3%	4.8%	4.5%	7.7%	6.2%
Washington County	9.6%	8.8%	7.8%	7.4%	6.5%	5.6%	4.9%	4.2%	3.7%	3.2%	8.2%	6.6%
<b>Difference from Maryland</b>												
	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
Western Maryland Region	1.8%	1.6%	1.3%	1.4%	1.3%	1.2%	1.2%	0.7%	1.0%	1.1%	0.2%	0.0%
Allegany County	1.7%	1.9%	1.9%	1.9%	1.8%	1.9%	1.8%	1.3%	1.4%	1.5%	1.4%	0.7%
Garrett County	1.2%	1.2%	1.3%	1.5%	1.3%	1.2%	1.2%	0.3%	1.3%	1.5%	0.6%	0.5%
Washington County	1.9%	1.6%	0.8%	0.8%	0.7%	0.5%	0.6%	0.4%	0.2%	0.2%	1.0%	0.1%

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

## SWOT Analysis

Tri County Council for Western Maryland conducted an annual SWOT analysis of the region's strengths, weaknesses, opportunities, and threats. Adjustments to the SWOT were made as needed. Council staff worked with the CEDS Committee, local government, elected officials, business owners, and community members to complete the analysis. The plan of action and priority areas determined from the SWOT to maximize the economic potential of the Western Maryland region of Allegany, Garrett, and Washington counties are identified in the CEDS document.

<p><b>Strengths</b></p> <p><i>A region's relative competitive advantage</i></p> <table> <tr> <td>Abundant Electricity</td><td>Arts &amp; Entertainment</td></tr> <tr> <td>Healthcare</td><td>Higher Education</td></tr> <tr> <td>History</td><td>Incentive Programs</td></tr> <tr> <td>Interstate</td><td>Manufacturing</td></tr> <tr> <td>People/Community</td><td>Quality of Life</td></tr> <tr> <td>Tourism</td><td></td></tr> </table>	Abundant Electricity	Arts & Entertainment	Healthcare	Higher Education	History	Incentive Programs	Interstate	Manufacturing	People/Community	Quality of Life	Tourism		<p><b>Weaknesses</b></p> <p><i>A region's relative competitive disadvantage</i></p> <table> <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 (water/waste water)</td></tr> </table>	Access to Industrial Sites	Air Travel	Broadband Access	Cultural Diversity	Distance to Metro Areas	Geography / Topography	Public Transportation	Ready Workforce	Regulations	Water Infrastructure (water/waste water)				
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<p><b>Opportunities</b></p> <p><i>A region's opportunities for improvement or progress</i></p> <table> <tr> <td>Affordable Housing</td><td>Alternative Energy Sources</td></tr> <tr> <td>Agriculture</td><td>Autonomous Technology</td></tr> <tr> <td>Availability of Water</td><td>Bio-Technology</td></tr> <tr> <td>Changing Perceptions (social and cultural)</td><td>Cyber-Technology</td></tr> <tr> <td>Entrepreneurship</td><td>Education</td></tr> <tr> <td>Regional Airports</td><td>Recreation</td></tr> <tr> <td></td><td>Workforce Development</td></tr> </table>	Affordable Housing	Alternative Energy Sources	Agriculture	Autonomous Technology	Availability of Water	Bio-Technology	Changing Perceptions (social and cultural)	Cyber-Technology	Entrepreneurship	Education	Regional Airports	Recreation		Workforce Development	<p><b>Threats</b></p> <p><i>A region's negative impacts or regional decline</i></p> <table> <tr> <td>Access to Water</td><td>Affordable Housing</td></tr> <tr> <td>Cost of Utilities</td><td>Declining Coal Industry</td></tr> <tr> <td>Declining Forestry Industry</td><td>Declining Youth Population</td></tr> <tr> <td>Failing Infrastructure (or lack of)</td><td>Increased Drug Addiction</td></tr> <tr> <td>Regulation</td><td>Municipal Tax Rates</td></tr> <tr> <td></td><td>Traffic Congestion</td></tr> </table>	Access to Water	Affordable Housing	Cost of Utilities	Declining Coal Industry	Declining Forestry Industry	Declining Youth Population	Failing Infrastructure (or lack of)	Increased Drug Addiction	Regulation	Municipal Tax Rates		Traffic Congestion
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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 2020.

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 Priority Areas for the CEDS next five-year plan 2023-2027.

#### **Online Survey:**

Following recommendation by the CEDS Committee and approval by the TCCWMD board of directors, the Survey launched to the region on Thursday, July 14, 2022. 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 social media campaign included announcement of the survey release, press releases, and reminders to participate. Social media 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 Monday, August 15, 2022 a total of 550 respondents from the region had participated. Categories for the 69-question survey included: Broadband, Economic Development, Education, Healthcare, Housing, Leisure & Hospitality (Tourism) and Workforce.

#### **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. 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 "yes," "no," or "no opinion."



**Demographics:**

The majority of respondents were full-time residents of Garrett, Allegany, and Washington counties in Western Maryland.

- 45% (R=245) reside in Allegany County with Cumberland and Frostburg the most represented at 62% (R=152) and 30% (R=73) respectively.
- 18% (R=97) reside in Washington County with Hagerstown the most represented at 70% (R=69).
- 14% (R=75) reside in Garrett County with Oakland the most represented at 41%(R=31).
  - Based on zip code analysis, remaining respondents reside:
    - 21% (R=28) nearby West Virginia
    - 16% (R=22) throughout Maryland
    - 8% (R=11) nearby Pennsylvania

The majority of respondents indicated their place of employment as Garrett, Allegany, and Washington counties in Western Maryland.

- 48% (R=265) are employed in Allegany County with Cumberland and Frostburg the most represented at 64% (R=170) and 33% (R=88) respectively.
- 18% (R=97) are employed in Washington County with Hagerstown the most represented at 85% (R=82).
- 12% (R=65) are employed in Garrett County with Oakland the most represented at 51%(R=33).
  - Based on zip code analysis, remaining respondents reside:
    - 24% (R=29) throughout Maryland
    - 6% (R=7) nearby Pennsylvania
    - 4% (R=5) nearby West Virginia
    - 11% (R=13) Retired

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

- 52% (R=285) Family
- 48% (R=264) Quality of Life
- 37.7% (R=207) Employment opportunities
- 18.2% (R=100) Housing affordability
- 13.8% (R=76) Recreational opportunities
- 10.7% (R=59) Education
- 8.6% (R=47) Housing availability
- 6.0% (R=33) Healthcare
- 4.6% (R=25) Taxes/Regulation
- 3.6% (R=20) Broadband

Respondents were given the option to provide: age and annual household income.

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

- 38.4% (R=213) 56 years of age and older
- 45% (R=249) 36-55 years of age
- 16.6% (R=92) 35 years of age and younger

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

- 12.4% (R=65) reported annual household income under \$50,000
- 34.7% (R=182) reported annual household income between \$50,001 and \$100,000
- 25.4% (R=133) reported annual household income between \$100,001 and \$150,000
- 27.5% (R=144) reported annual household income \$150,001 and over

Respondents identified their roles in promoting economic development in their community (*respondents were able to select all that applied; identifying with 3 roles*):

- 95.3% (R=524) identified as “owning or operating a business, an employee, an investor, or commercial property owner”
- 74.5% (R=410) identified as “a consumer of regional goods and services”
- 73.8% (R=406) identified as “a residential property owner”
- 42.7% (R=235) identified as “serving as a board member or volunteer for one or more civic or non-profit organization”
- 10.4% (R=57) identified as “an elected local, state, or federal official or local, state, or federal government employee”

### **Summary of Survey Findings:**

Respondents significantly indicate the biggest opportunity in the region as the tourism industry and recognize the region's leisure & hospitality economy bringing visitors to the region supports regional business development. When asked to identify from specified categories, 63.3% (R=311) identified Recreation as the amenities sufficient for the region, Respondents recognize the 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. At the time of the survey, 39% (R=213) indicated doing more than 50% of their shopping online.

Respondents free form responses clearly indicate the necessity for a skilled workforce as one of the region's most pressing needs. This need is greater than the previous survey suggesting the national economy and COVID-19 pandemic have affected the region. As the need for an educated, skilled, ready workforce closely mirrors the last survey results, the loss of educated young workers 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 of current or new businesses.

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, bio-technology 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 opportunities to retain young workers in the region, and provide professional-level employment opportunities for spouses/significant others of professionals relocating to the area.

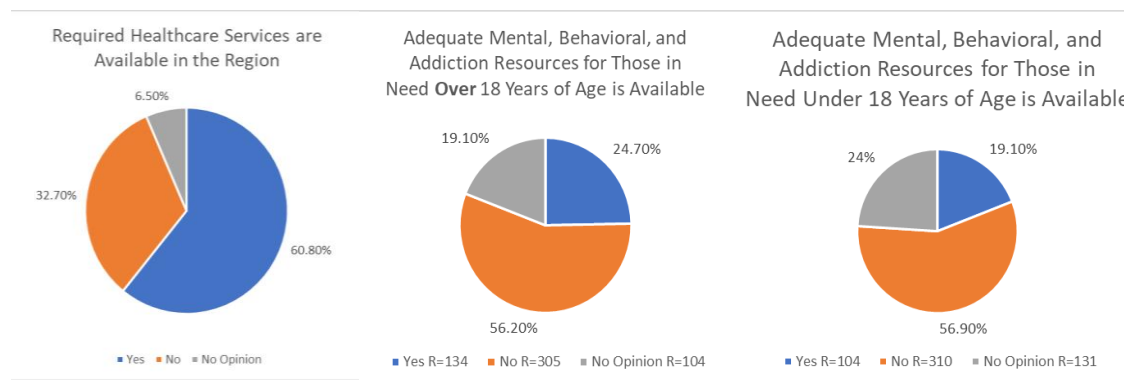
Compared to the previous survey, the region's infrastructure is generally perceived as meeting expectations. However, there are pockets of the region that are still lacking. Primary roads, secondary roads, and public utilities (water, sewer, trash removal, recycling, etc.) generally meet expectations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

Respondents regard government in the same perspective as 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.

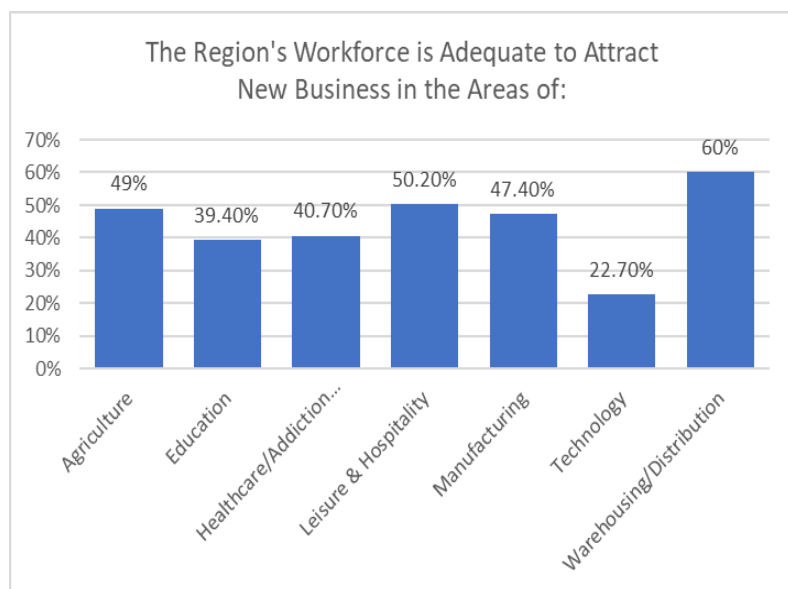
Respondents decidedly agree that healthcare services present economic development opportunities in all areas of the region. There is overall agreement that healthcare in the region and the services that are required meet expectations.

With this survey, respondents were asked to consider drug addiction issues for the second time. Respondents clearly state that drug addiction is very detrimental to the region; comparable to other areas across the state, nation, and Appalachia. The majority indicated there are not adequate mental, behavioral, and addiction resources for those in need over and under 18 years of age. 52.2% (R=282) responded their family/business has been affected by drug addiction issues.

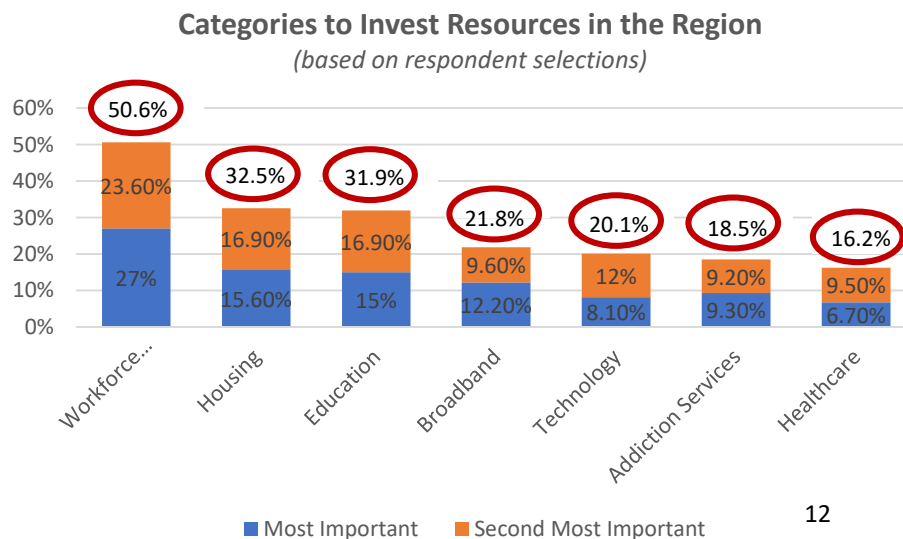
When asked if access to mental, behavioral, and addictions health care resources and services meets the needs of the region as well as whether adequate resources are available for those over 18 years of age and under 18 years of age respondents indicated:



Respondents were 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=481) selected an average of 2.7 categories with results reflected below:



Respondents were asked to indicate from the specified categories shown, the most important category to invest resources in the region and the second most important category to invest resources in the region (*respondents were able to select only one*). Respondent (R=539) results are reflected below:





## **General Plan of Action**

### **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 vitality. 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 the current defederalization of loan funds 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 exist 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 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 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 areas 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 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 it 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.

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%. As Marylander's began to return to work, due to COVID-19, unemployment rates as of June 2020 indicated Allegany County with the fourth highest unemployment rate in the state at 9.7%, the Garrett County rate of 7.7% followed and the Washington County rate was 8.2%.

Since that time to June 2021, the workforce has seen a slight return of employment. The Western Maryland region reports unemployment rates at 7.4% for Allegany County, 6.2% for Garrett County, and 6.6% for Washington County.

#### **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.

### **Strategic Direction/Action Plan**

The Council seeks to implement the Strategy and Action Steps outlined through the planning process 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 federal 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 offering a program for 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 maintain that program. Frostburg State University currently houses an Office of Regional Development and Engagement which Tri-County Council anticipates using to strengthen our continued outreach to the community.

## Identification of Priority Areas

The initial Priority Areas were developed from a review of the 2018-2022 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 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 members, newsletter databases, Chambers of Commerce, offices of Economic Development, community partners, civic organizations, education institutions, and municipalities. Launch of the survey was followed by a social media outreach. The social media campaign 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 three Priority Areas 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 priorities were then chosen by the Committee as the focus for the region during the upcoming 2023-2027 five-year period.

### Priority Areas

There were three specific categories that identified the majority of the priority areas. These three categories were then given special attention to define the particular categories.

The selection of these topics were deemed as the most important areas of focus in the region:

1. Economic Development
2. Workforce Development and Training
3. Infrastructure

These categories 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.

The Priority Areas are defined by the following categories:

#### Economic Development

- Foster Entrepreneurship
- Acknowledge and Embrace Tourism and Recreation
- Access to Capital
- Lack of Greenfield Sites
- Coordination of Transportation

#### Workforce Development and Training

- Stronger Coordination Between Education, Employers, and Training Organizations
- Availability of Continuing Education Opportunities
- Availability of Career and Technical Schools
- Emphasis on Retraining Veterans and Those Recovering from Addiction
- Access to Healthcare

#### Infrastructure

- Broadband, Affordability and Open Access
- Infrastructure – aging water, sewer, treatment plants
- Infrastructure – new water, sewer, roads, bridges

## Foster Entrepreneurship

**Benefit to the Community** - Increase employment and tax growth with individuals who have a loyalty and vested interest in the community.

**Issue** – The majority of the region is suffering from a declining population and therefore a lack of leadership in the community. Much of this leadership comes from small business owners that are declining either due to age or the economic decline.

**Strategy** – Increase the number of local graduates that are interested in starting their own business.

**Action Steps:**

- Integrate classes in the K-12 educational system that target the skills necessary to become a business owner.
- Create an economic development environment that supports start-up businesses.
- Provide easy access to mentors and affordable capital.

## Acknowledge and Embrace Tourism and Recreation

**Benefit to the Community** – Tourism was identified in the community survey as the number one opportunity in the region for productive economic development. An increase in tourism means additional revenue into the community from outside the area.

**Issue** – Community leaders have long been divided if tourism will provide the return on investment necessary to increase the tax base.

**Strategy** – Embrace tourism as a growth industry that will benefit all parts of the communities by increasing revenue in the region.

**Actions Steps:**

- Provide a unified front that embracing tourism is a positive means of economic development.
- Invest in existing tourism efforts and embrace new efforts that can attract people from outside of the area.
- Encourage entrepreneurs to enter the tourism field, particularly as it relates to outdoor recreation.
- Increase marketing dollars for the existing region and collaborate on destination marketing.

## Access to Capital

**Benefit to the Community** – Provide funding for start-up companies as well as expanding businesses.

**Issue** – Over the years start-up companies primarily used the value in their homes as collateral to obtain a business loan. The housing crash of 2007 changed that almost overnight. When combined with rising interest rates, new and existing businesses are finding the cost of doing business is more expensive than ever.

**Strategy** – Create an easy and affordable stream of capital that will encourage growth and the creation of new businesses.

**Action Steps:**

- Increase the amount of capital available for small and expanding business.
- Continue to offer lending, particularly for those that would not qualify for a traditional bank loan.
- Provide incentivized interest rates to those companies that meet certain positive economic thresholds.
- Market the funds that are available.



## Lack of Greenfield Sites

**Benefit to the Community** – Attract new companies to the community by having a large selection of ready-to-build sites throughout the region.

**Issue** – Much of the region is geographically challenged to provide large greenfield sites. The sites that are available are lacking the needed infrastructure to attract businesses.

**Strategy** – Provide the needed infrastructure to those limited sites so that they can be built upon in an expedited timeframe. This includes the needed water, sewer, gas, electric, roads, and broadband.

**Action Steps:**

- Identify the sites that are available.
- Purchase the sites in areas where private developers are not involved.
- Extend infrastructure to the sites.
- Work with private developers to incentivize development.

## Coordination of Transportation

**Benefit to the Community** – Remove transportation as a barrier to both basic needs and employment.

**Issue** – A lack of reliable options for transportation negatively impacts the community to provide workforce, tourism, and expanded population.

**Strategy** – Increase the options for transportation across the region to provide a coordinated strategy for all aspects of growth.

**Actions Steps:**

- Work with employers to coordinate public routes by ensuring aligned shifts and business buy in.
- Attract private companies such as Lyft and Uber to invest in our community.
- Coordinate existing services to aggregate demand and provide affordable and reliable transportation alternatives.

## Stronger Coordination Between Education, Employers, and Training Organizations

**Benefit to the Community** – Provide specialized industry specific training to ensure that new and current businesses have an available, knowledgeable workforce.

**Issue** – Graduates currently do not have the specific skill sets that local industry demands.

**Strategy** – Support 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.

### Action Steps:

- Continue to align colleges with the Manufacturer’s Roundtable to collaborate and determine needs in the industry and develop curriculum for new and current workforce opportunities.
- Invest in the education of the workforce to foster an engaged population.
- Encourage education, businesses, and industry in the region to promote the positive benefits of education and investment in the workforce to grow the region’s economy and community life.
- Promote the region’s higher education institutions and training organizations’ support of workforce opportunities.
- Provide educational institutions with a list of needed skills sets not currently being taught.

## Availability of Continuing Education Opportunities

**Benefit to the Community** – Become more competitive with other regions.

**Issue** – Too many local graduates relocate out of the area for employment without realizing the opportunities available within the region.

**Strategy** – Support workforce training opportunities.

### Actions Steps:

- Support employers in the region with business and technical skills training.
- Offer courses specific to industry sectors by working directly with regional manufacturers to develop classes/programs unique to our area.
- Educate the citizens on the number of living wage jobs in the region to keep younger people from moving out of the area.

## Availability of Career and Technical Schools

**Benefit to the Community** – Increase the number of students going into the building and trades industry.

**Issue** – The trades industry is desperately in need of workers.

**Strategy** – Enhance the quality of technical school education in the region to provide a skilled workforce in targeted industry sectors.

### Action Steps:

- Work with the Center for Career and Technical Education (Allegany County) and Washington County Technical High School (Washington County) to help area businesses see the Centers as valuable resources for training and recruiting future employees.
- Educate employers of the articulation agreements and college credits students are eligible to earn while in high school.
- Increase the opportunities for students in the vocational trades at the high school level which will prepare them for college and career readiness.
- Create a vocational school in Garrett County.

## Emphasis on Retraining Veterans and Those Recovering from Addictions

**Benefit to the Community** – Increase available workforce.

**Issue** – Currently there is not enough workforce to meet the local demand.

**Strategy** – Support the re-entry and retraining of those returning to or entering the workforce.

### Actions Steps:

- Encourage employer programs that support peer mentoring.
- Provide addiction services that work with local businesses for re-entry into the workforce.
- Identify those local jobs that currently can not meet the labor demand.
- Specific training that will allow direct entry into the workforce.
- Engage with local businesses to help create training programs.

## Access to Healthcare

**Benefit to the Community** – Improved health care will result in a healthier, more productive population with an improved quality of life.

**Issue** – The healthcare industry is experiencing a shortage of nurses and doctors in the rural areas of the region.

**Strategy** – Improve access to effective health care.

### Action Steps:

- Increase the number of nurses and doctors in rural medical facilities.
- Educate area residents of the increased access to mental health treatment available in the region.
- Support the opportunity for growth and economic development of healthcare in the region.

## Broadband, Affordability and Open Access

**Benefit to the Community** – Provide all the residents of the region access to affordable and competitive broadband services.

**Issue** – As teleworking becomes more common across the region, availability of broadband internet connectivity is essential to meet the needs of business/employers and personal residences alike.

**Strategy** – Increase availability of broadband access to the region's businesses at an affordable price making them nationally competitive to conduct business.

**Action Steps:**

- Continue to expand the regional fiber and wireless systems across the region through cooperation with the Maryland Broadband Cooperative and others.
- Connect all community anchor institutions (schools, libraries, medical and healthcare providers, public safety entities, community colleges and other institutions of higher education, and other community support organizations) to high speed internet in order to offer the best possible service to our citizens.
- Encourage the remote workforce to discover the region as a place to work, play, live.

## Infrastructure Improvements – Aging, Water, Sewer, Treatment Plants

**Benefit to the Community** – Improved regional infrastructure offers economic growth, enhanced safety, and an improved quality of life.

**Issue** – Water and sewer lines in the region are aging and many of them are badly in need of replacement.

**Strategy** – Improve and maintain the overall water, sewer, and treatment plant infrastructures throughout the region.

**Actions Steps:**

- Separate the combined storm water and sanitary sewer lines.
- Meet the Total Maximum Daily Load (TMDL) requirements as set by the State of Maryland

## Infrastructure Improvements – New, Water, Sewer, Roads, Bridges

**Benefit to the Community** – Development of regional infrastructure offers economic growth, enhanced safety, and an improved quality of life.

**Issue** – Infrastructure in the region is aging without the tax base available for replacement.

**Strategy** – Provide adequate water and sewer resources to serve the region and allow for expansion by residential and business growth.

**Action Steps:**

- Encourage coordination of county and local officials to invest in regional sites without adequate infrastructure
- Encourage business activities in real estate, construction, and land development to recognize economic development opportunity in the region.

## Economic Resilience

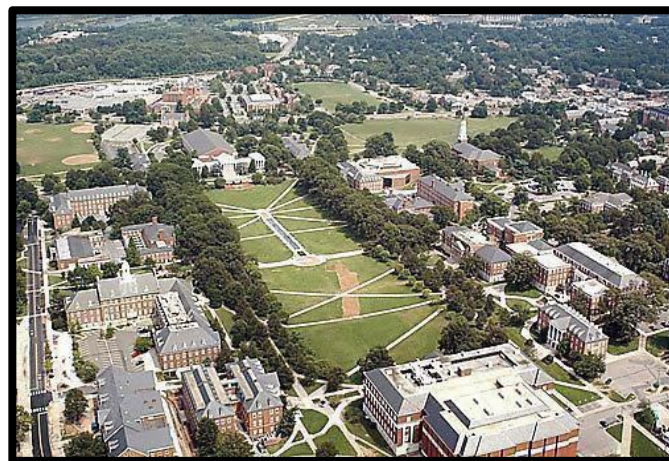
Tri-County Council for Western Maryland is the Local Development District (LDD) in Maryland and therefore contributes greatly to the input of the State's strategic plan. The board members are a diverse group of private business leaders as well as public officials. The Council has five workgroups that 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 initiatives that would contribute to the growth and sustainability of Western Maryland.

The State of Maryland 2020-2024 Appalachian Development Plan 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.

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 as well as the local Boards of Education. The focus at all levels of education is academic excellence and increasing Science, Technology, Engineering and Math (STEM), active learning labs, and robotics programming in order to grow our own workforce and foster entrepreneurship. In addition to providing a solid college education for traditional students, the community colleges are also playing a role in closing skills gaps and addressing the changing workforce needs and labor force training needs.

A partnership between Allegany County and FSU has moved the county forward with an implementation study for an Autonomous Technology Center (ATC). Following a promising feasibility study and location of an ATC in Appalachian Maryland, the goal is to position Maryland as a national leader in autonomous technologies research and development.

Additionally, Frostburg State University 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.<sup>5</sup>



The State of Maryland established an Office of Regional Development and Engagement (RDE) at Frostburg State University to further economic development in Western Maryland. The Office integrates University resources with regional partners to help communities and companies be competitive and meet the challenges of economic and community development in Appalachian Maryland. The three main priorities are: 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.

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.

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 41.6% of respondents agree that advanced manufacturing provides employment opportunities for highly trained and skilled workforce in the region.

As the primary tenant of the newly completed Western Maryland Works Makerspace, Allegany College of Maryland Continuing Education & Workforce Development Industrial Manufacturing Program provided displaced workers from the Luke Paper Mill with the first experience to participate in machining, welding, and industrial maintenance training. These industry recognized programs will lead to securing mid-to-high-level manufacturing jobs.

The 33,000 square foot maker space houses high-tech training equipment, instructional labs, classrooms, collaborative areas and office space for Allegany College of Maryland staff. Grant funds provided the opportunity to purchase computers, electronic classroom systems and other equipment.



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. Improving access and infrastructure for local businesses to regional and national markets is an essential component of the region's economic development strategy. Therefore, links with local access roads and broadband development are critical parts to the region's development.

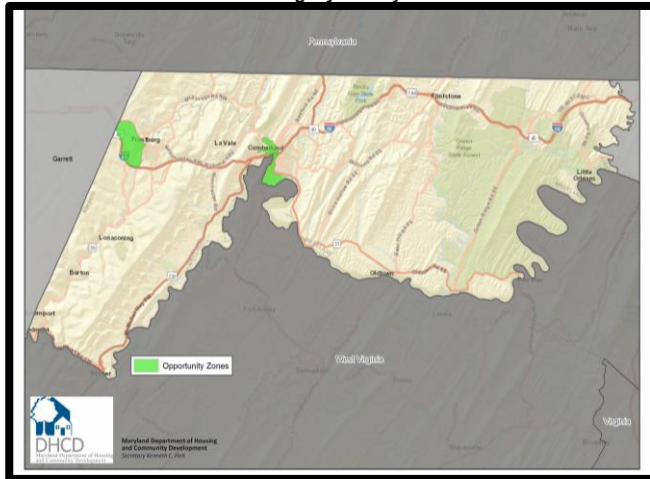
Available tax incentive programs the region offers includes: Biotechnology Investment Incentive, Brownfields Tax Incentive, Cybersecurity Investment Incentive, Enterprise Zone, HUBZone, Job Creation, More Jobs for Marylanders-Manufacturing Tax Credit, One Maryland, Opportunity Zones, Regional Institution Strategic Enterprise (RISE) Zone Program and Research & Development.



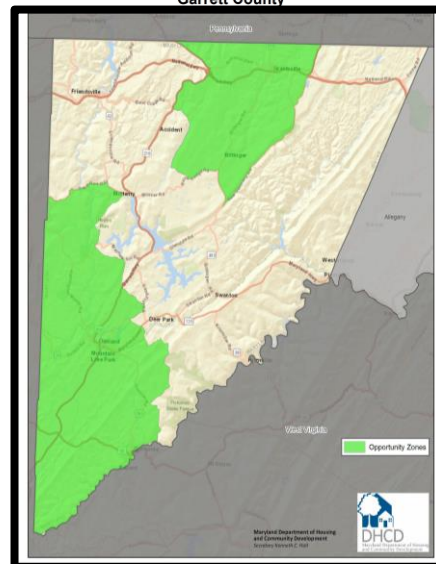
Opportunity Zones, created under the 2017 Tax Cuts and Jobs Act, are a federal economic development tool focused on improving the outcomes of communities across the country. Opportunity Zones are designated low-income census tracts and were established to encourage long term investment in low income urban and rural communities. An Opportunity Zone is an economically-distressed community where private investments, under certain conditions, may be eligible for capital gain tax incentives. As of July 2018, 737 census tracts were designated Qualified Opportunity Zones across Appalachia. There are 12 designated Qualified Opportunity Zones located in Appalachian Maryland. Four are located in Allegany County, three in Garrett County, and five in Washington County.

County	Census Tract	Census Tract	Census Tract	Census Tract	Census Tract
Allegany	24001000800	24001001000	24001001100	24001001800	
Garrett	24023000200	24023000600	24023000700		
Washington	24043000400	24043000500	24043000700	24043000800	24043010802

**Maryland Opportunity Zones  
Allegany County**



**Maryland Opportunity Zones  
Garrett County**



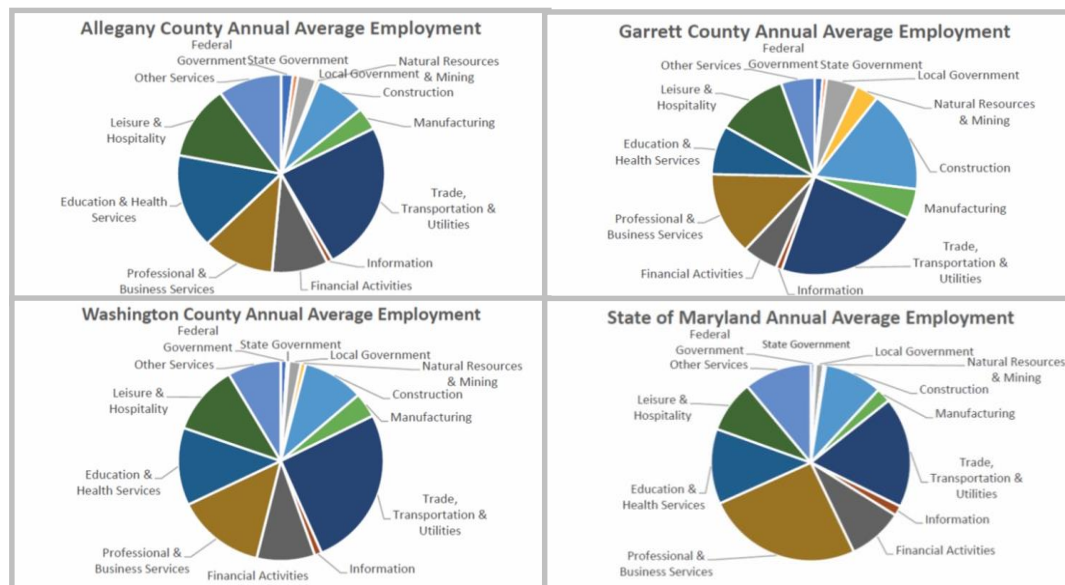
**Maryland Opportunity Zones  
Washington County**





The region has experienced an increase in the Education & Health Services industries. Garrett Regional Medical Center in Garrett County, UMPC Western Maryland 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) and Allegany College of Maryland (Allegany), and Hagerstown Community College (Washington) are listed in the Top 20 Major Employers for their respective counties.<sup>6</sup>

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



Broadband connectivity, as a tool to compete in the global economy has been a focus for economic development for two decades and is still identified as a top regional issue hindering development. It was recognized early on that a business case for private companies to expand their networks in rural communities simply could not be made. For this reason, counties in the region began building public networks in an effort to provide a solution to the problem of lack of broadband infrastructure and connectivity. The more rural the area, the bigger undertaking a project is and the harder it is to justify the expense. Creative solutions such as wireless networks using microwave and TV whitespace spectrums have helped fill in some of the gaps that exist.

During 2020, the issue was in the forefront with the majority of educational institutions forced to provide virtual learning due to the COVID-19 pandemic as well as employers offering telework opportunities. The Governor's Office of Rural Broadband awarded grant assistance in August 2020 to provide wireless access to rural students via cellular hotspots or similar resources in areas where broadband infrastructure did not exist. Grants for unserved students were awarded to all three Western Maryland counties.

As projects moved forward, it was also learned the government simply does not have the capacity to run a broadband company and private partnerships were formed as a solution to the problem. The state also recognized the need for a public/private partnership as a solution to filling the gaps in technology.

For this reason, the State of Maryland created the Maryland Broadband Cooperative, a non-profit entity that was charged with deploying infrastructure into the rural areas of the state that were severely underserved. The Cooperative, along with many other private partners have deployed new infrastructure across the region which is slowly moving the needle to providing services that have quickly become a necessity rather than a luxury.

Most recently, TCCWMD received a grant from the Maryland Department of Commerce Advantage Maryland Fund (MEDAAF) Program. The \$242,000 funds were used to match a federal Appalachian Regional Commission (ARC) grant to the Maryland Broadband Cooperative to increase the fiber network in Allegany and Garrett counties. The project installed over seven miles of fiber across the region and connected an additional forty-four miles of fiber. This connectivity allows Cooperative members (over 60 ISPs) to provide lit fiber services to eight industrial parks across the western half of the region. The project fulfilled the need of critical infrastructure and was completed in June 2019.

At first glance this project seems like merely an installation project but should be viewed as a major success in cooperation between non-profits and many branches of private and public entities. Pole attachment agreements were required with several private companies, an MOU with the City of Cumberland was executed to utilize their existing fiber, the state of Maryland increased the amount of fiber the Cooperative was able to utilize in its resource sharing agreement and the State Highway Administration permitted the usage of its Frostburg facility as the location of a new Point of Presence.

In addition, State, Federal, Regional, County and municipal resources combined with additional resources of the Maryland Broadband Cooperative made this project possible. This clearly could not have been done without the involvement of many stakeholders. As one of the top recommendations of the Governor's Maryland Broadband Taskforce, TCCWMD was able to leverage existing assets to expand and offer new services.

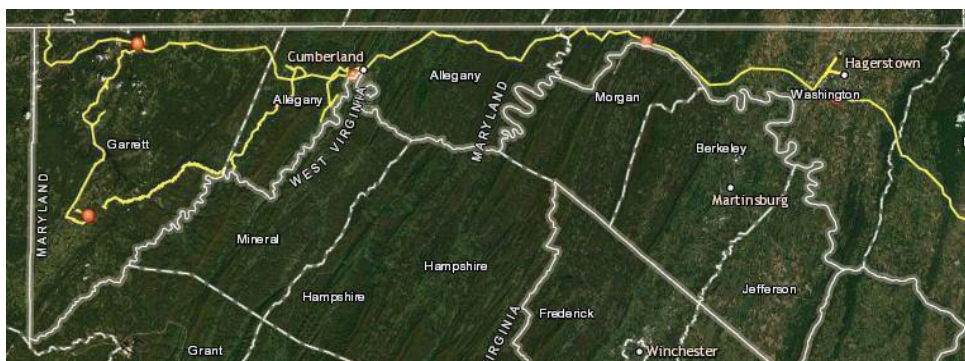
Impacts of the project include supporting direct interconnects at the Dennett Road Data Center in Garrett County, bringing service to three previously unconnected laterals along MD Route 36, MD Route 220, and downtown Frostburg. Additionally, services are now available on the Cumberland Fiber footprint and eight business and industrial parks.



*Point of Presence structure being placed at the Maryland SHA facility in Frostburg, MD*

Business Parks served in Allegany County include: Barton Business Park, Frostburg Business Park, North Branch Industrial Park, and Riverside Industrial Park. Business Parks served in Garrett County include: Central Garrett Industrial Park, Keyser's Ridge Business Park, McHenry Business Park and Southern Garrett Industrial Park.

One of the more notable achievements of this project is the creation of a fiber ring through Garrett and Western Allegany county. The creation of this rings means that redundant services are available which equates to less chance of an outage of service. For businesses this proves to be nearly as important as the broadband itself as companies relying on broadband would essentially be closed if a loss in service was experienced.



*Garrett, Allegany, Washington Counties coverage, Maryland Broadband Cooperative, <http://mdbc.us/coverage>*

Several projects are currently underway around the region and many more planned. Planned developments often now consider the installation of fiber and other broadband infrastructure as essential as basic water and sewer to the success of a project. This infrastructure is as essential to business retention as it is to business attraction because of the need to transport data and compete in the global economy.

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. Professional, technical, and service-related industries remain the top employers. The region is emerging as a center for technology.

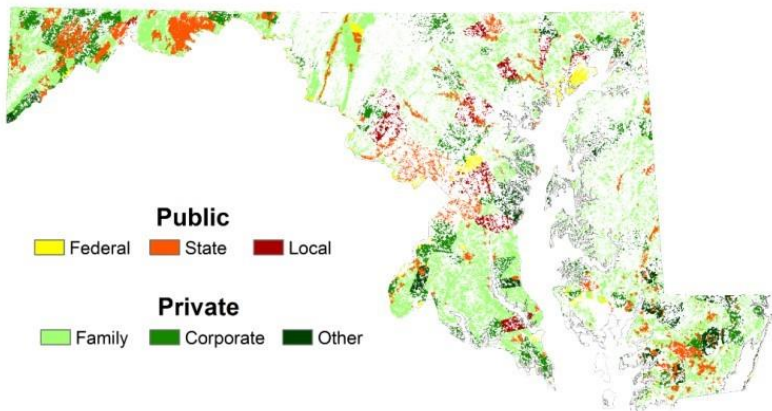
The Western Maryland counties are poised for growth in the technology industry. With the Biotechnology and Cybersecurity Investment tax credits, offering incentives to high-tech and biotech industries to locate in rural Maryland, programs are continuing to educate and prepare the regional workforce. In addition, the state-sponsored P-Tech Program encourages young students to pursue a career in the growing cyber technology sector. Furthermore, 32.4% of survey respondents agree that cyber-technology services across all industries provides opportunities to advance the region economically. That agreement continues with 79.3% of respondents agreeing that computer sciences, e-commerce, and technology development will enhance economic development opportunities for the region.

The 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.<sup>7</sup>

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 Enterprise Center (GIEC); Frostburg State University and Allegany College of Maryland's Western Maryland IT Center for 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.



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. The Maryland Department of Natural Resources manages over 475,000 acres of public lands and protected open space in the State. From the western region, those protected lands include Garrett County with 87,635 acres, Allegany County with 67,184 acres, and Washington County with 22,663 acres. The region has identified natural resources as one of the area's key assets and has worked to promote the responsible use of the environment. The region relies on its trees and forests for recreation, scenic beauty, and economic diversity.



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 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 years spilling over to additional trails and trail development. The growth has aided in the emergence of 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 50.2% of respondents identify the region's workforce is adequate to attract new business for the region in the area of tourism.

With recent growth and development of tourism-related businesses having a positive impact from recreational, historical, and heritage attractions, the region is working to turn challenges into opportunities with support for asset-development around the outdoor recreation opportunities in the region.

The I68 Regional Alliance has Identified recreation as a targeted industry for the region.



Furthermore, COVID-19 reinforced the strength and importance of the region's outdoor assets.

## Planning for and Implementing Resilience

The Maryland Appalachian region consists of twenty-four municipalities within three counties. 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 the 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 20<sup>th</sup> 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 companies looking for fast, efficient modes of transport. Interstate 68 in Western Maryland was completed in August of 1991-almost thirty-one years after this vital infrastructure was planned for development. During this thirty-year

period, Appalachian Maryland saw some of the 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. Road construction advanced along Interstate 68 in 2019 at the Grantsville (Garrett County, MD) exit. With the 1.4 mile realignment completed, the construction replaced the existing U.S. Route 219 with a new four-lane highway at I-68 and U.S. Route 40. Remaining to be completed is a 5.5 mile section from Meyersdale, PA to the Maryland state line. 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. Economic development efforts have shifted to attracting information technology and advanced manufacturing plants. 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. Most recently, TCCWMD received a grant from the Maryland Department of Commerce Advantage Maryland Fund (MEDAAF) Program. The \$242,000 funds were used to match a federal Appalachian Regional Commission (ARC) grant to the Maryland Broadband Cooperative to increase the fiber network in Allegany and Garrett counties. The project installed over seven miles of fiber across the region and connected an additional forty-four miles of fiber. The connectivity allows Cooperative members (over 60 ISPs) to provide lit fiber services to eight industrial parks across the western half of the region. The project fulfilled the need of critical infrastructure and was completed in June 2019.

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, Income, Population, 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 call 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, tourism, biotechnology, cyber-technology, 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 Opportunity Zones and 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 Tri-County Council's role as Economic

Development District (EDD). 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 includes 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 financing for businesses that cannot obtain needed financing from traditional sources.** Currently, the Council has ten distinct loan funds with the sole purpose of providing financing to small businesses to create or retain jobs in the region. The Council implemented a plan of action to increase available funding and loosen lending requirements with its funding partners. The strategy included consolidating several EDA loan fund accounts into one account. This process allowed for less frequency in reporting and internal administration as well as allowed for a one-year variance in lending eligibility including leveraged funds, owner equity, and bank participation in the project. EDA approved the de-federalization of the RLF on June 19, 2020. While this action did not increase capital, it did put in place an immediate tool to match other federal dollars. The Council addressed the need for additional capital for lending with awards in March 2022 of \$1.5 million and November 2022 of \$444,444 through the State's Rainy Day Fund.

- **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.

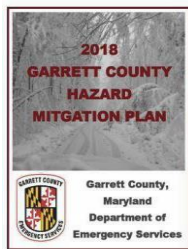


## Establishing Information Networks

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. The Council continues to keep on file the hazard mitigation plans that are currently in effect for Garrett, Allegany, and Washington Counties.

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 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.<sup>8</sup>

<https://www.garrettcounty.org/resources/emergency-services/pdf/2018-Garrett-County-Hazard-Mitigation-Plan-Update.pdf>

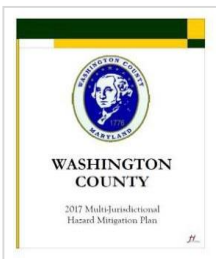


The Allegany County Department of Emergency Services strives to achieve and sustain core capabilities in support of emergency communications, preparedness, response and recovery initiatives. Our mission is to provide critical emergency services to our residents and visitors, which includes: Emergency 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 use of technology to provide improved readiness, warning, response and recovery from emergencies and disasters; Foster cooperation between service providers, citizens and our department to achieve the common goal of protection of life and property.<sup>9</sup>

<https://www.alleganygov.org/DocumentCenter/View/4456/Allegany-County-Hazard-Mitigation-Plan-PDF>



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.<sup>10</sup>

<https://www.washco-md.net/wp-content/uploads/2017-Washington-County-HMP-MAY-2018-1.pdf>

## **Economic Recovery and Resiliency**

Tri-County Council for Western Maryland (TCCWMD) received an invitation on May 8, 2020 from U.S. Department of Commerce Economic Development Administration (EDA) to apply for supplemental funding under the Coronavirus Aid, Relief, and Economic Security (CARES) Act for the planning, preparing, preventing, and responding to the Coronavirus (COVID-19) pandemic. On June 4, 2020 TCCWMD applied to EDA and was approved on June 11, 2020. TCCWMD accepted the award and executed the grant agreement on July 22, 2020.

On August 17, 2020, TCCWMD submitted to EDA the Grant Administration Plan outlining how TCCWMD would implement the Authorized Scope of Work. Approval was received in early 2021 and TCCWMD began to implement the plan.

Our region's economy and workforce have been greatly impacted by the ongoing COVID-19 pandemic. Not only has the pandemic caused job losses but it has also revealed the importance of having a resilient regional economy that is able to withstand economic disruptions such as pandemics and other external shocks. To respond to the coronavirus pandemic, extensive regional cooperation and coordination were necessary. This project allowed our region to update and enhance its shared framework for economic development and resiliency through short-term and long-term economic development planning. It also allowed the region to assess impacts and provide support to our communities and businesses as we recover from COVID-19's devastating economic injuries.

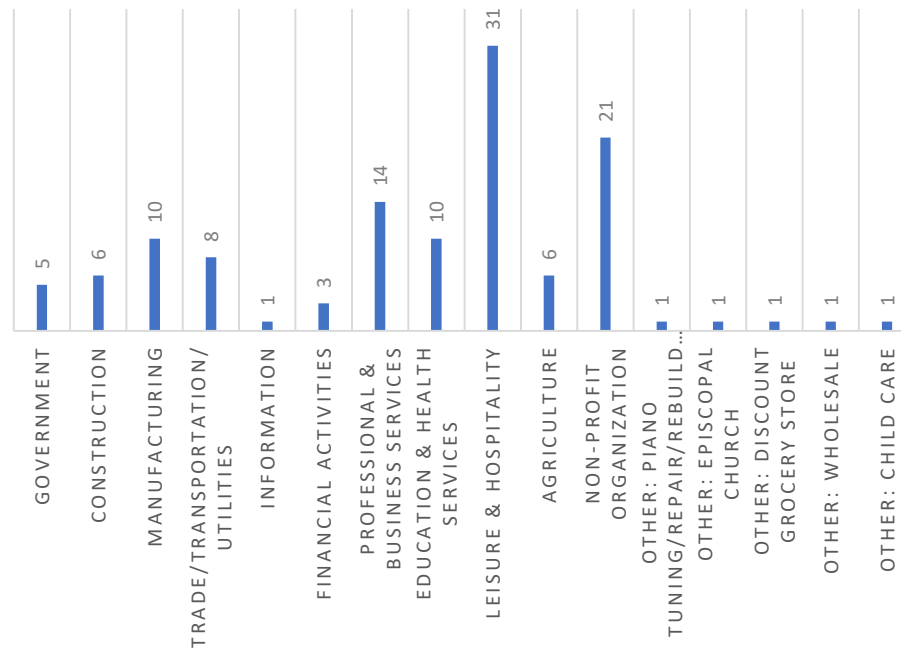
This project will develop an economic recovery and resiliency plan for the Tri-County Council for Western Maryland which serves Allegany, Garrett, and Washington counties in Maryland. The document will complement TCCWMD's Comprehensive Economic Development Strategy (CEDS). The planning effort will address the regional economic impacts of COVID-19, examine how the region should prepare for future impacts, how the region should respond to future impacts, and what steps can be taken to prevent future impacts. This effort will enable the region to identify current and future programs and activities that can mitigate the effects of the pandemic and ensure the recovery of the regional economy.

TCCWMD created subawards under the Coronavirus Aid, Relief, and Economic Security (CARES) Act grant to work with each of the individual county economic development agencies. The agencies gathered data by interviewing existing businesses, large and small, government agencies and municipalities to determine the impact of the coronavirus pandemic.

Businesses and government agencies require special attention during recovery to identify their needs and issues. Means to identify their needs and issues included electronic or paper surveys, large group meetings with businesses, or one-on-one in-person meetings. Some of the topics that help facilitate the answers to how the region should prepare for future impacts, how the region should respond to future impacts, and what steps can be taken to prevent future impacts will be from both businesses and from the experiences of leaders of economic development of the region.

The nineteen-question survey regarding the impact the COVID-19 pandemic may have had on the region's businesses was released on October 2021. This effort would enable the region to identify current and future programs and activities that can mitigate the effects of the pandemic and ensure the recovery of the regional economy. The survey closed on November 2021 with 120 responses. Participants from the region included 49% from Garrett County, 44% from Washington County, and 7% from Allegany County. Industry sectors represented included 31 business in the Leisure & Hospitality sector; twenty-seven of those businesses were located in Garrett County. Non-Profit Organizations were represented by 21 businesses; fourteen of those organizations were located in Washington County. Another 14 businesses represented the Professional & Business Services industry. Ten of each business in Manufacturing and the Education & Health Services sectors were represented. Each industry sector: government, construction, manufacturing, trade/transportation/utilities, information, financial activities, professional & business services, education & health services, leisure & hospitality, agriculture, and non-profit organizations was represented with at least one business as well as five businesses listed as Other industries.

## INDUSTRY SECTORS





Out of the 120 respondents, 72 businesses indicated that staffing levels were not the same as pre-Covid. Fifty-six of those businesses (47%) indicated that staffing levels were less. Seventeen businesses (14%) indicated that staffing levels had increased.

When asked if their business is experiencing staffing shortages, 61 business indicated staffing shortages of skilled workers and another 54 indicated staffing shortages of unskilled workers. Specific positions of concern included a wide range of skill levels. Entry level and front line (direct customer interaction) positions were noted as well as direct care positions and positions such as marketing director, grant writer to executive assistant were mentioned. Recruitment of employees and lack of applicants in general were noted as the need for staff among all businesses. Additional needs include truck drivers, machinists, production workers, web technology staff, farm labor, among others. In particular, one business noted, “we need people pretty much everywhere.”

Eighty businesses indicated they have changed their business model as a result of COVID-19. Changes to business models included reduced workforces for 33 businesses; reduced hours for 36 businesses; more online or ecommerce for 36 businesses. Eighteen businesses indicated they have changed the size of their physical space indicating less space being utilized. Forty-seven businesses indicated they anticipate these changes being permanent.

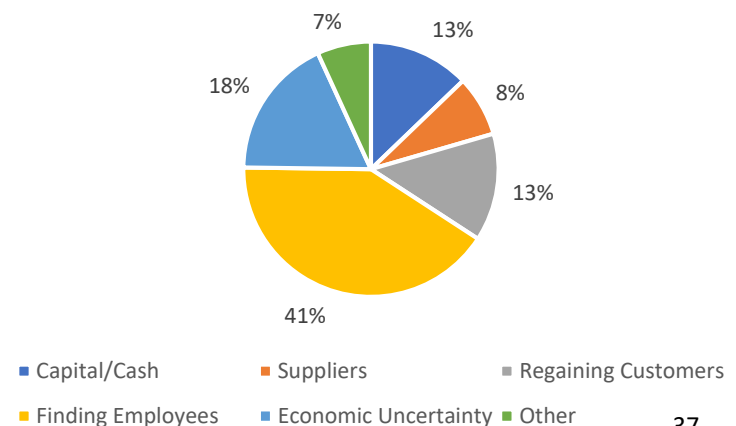
One hundred ten respondents answered the question if they have offered employees the opportunity to telework with 69 businesses not offering telework for their employees. The greatest opportunity for telework is for locations in Washington County with 24 businesses. From those, in all counties, who offered teleworking opportunities, three respondents noted that teleworking was offered at the beginning of COVID (during 2020) but not offered now.

The majority of businesses in all counties indicated issues with productivity as 59 businesses selected it. This was followed by technical challenges and communication issues. Among the Other responses were budget challenges, marketing challenges, relationship-building challenges, as well as customer service issues.

When asked if businesses have new policies in place to address the current or future events, 96 businesses responded to the question. Of those respondents, 83 businesses selected education of staff and customers, 40 indicated policies related to health screening, 29 addressed policies for teleworking, and 23 selected new policies in place to address current or future events using cloud-based services.

The greatest barrier to recovery for respondents from all three counties was finding employees. Of the 117 responses, 48 businesses selected finding employees. Economic uncertainty was ranked next with 21 responses followed by regaining customers by 16 businesses and capital/cash for 15 businesses. From the responses to finding employees, Garrett county responded with 25 businesses and Washington county with 21 businesses.

What does your business identify as the greatest barrier to recovery?





Asked what was/is your biggest challenge over the past 18 months, 82 responses were received for this open-ended question. 30 businesses (37%) indicated finding skilled labor/employees willing to work as the biggest challenge. This was followed by 18 businesses (22%) indicating that supply chain issues were a challenge. Other responses included understanding and following the changing COVID guidelines, keeping customer/members engaged, a lack of customers, mandatory closure of business, economic uncertainty, lack of sales and collection of debts due directly to COVID, increased cleaning protocols, poor connectivity from home; excess length of time it takes to accomplish work flow remotely, employees not willing to vaccinate, and trying to figure out how much change will be permanent were listed as challenges.

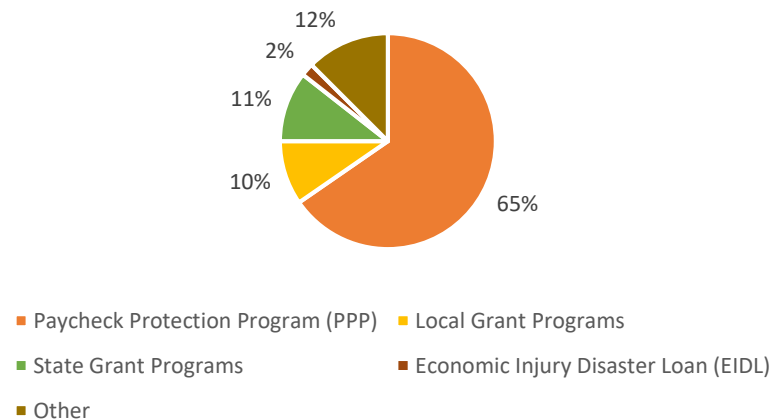
Businesses were asked to consider which of the following types of assistance would be most helpful to their company: business coaching, employee training, legal advice/policies, supply chain repair/resiliency, virtual business development (social media/website), recruitment of workers, help accessing broadband. Of the 104 respondents, 59 businesses (49%) indicated recruitment of workers as the greatest need for assistance. Supply chain repair/resiliency followed for 40 businesses. Other indications for assistance were virtual business development at 21 businesses, legal advice/policies at 17 businesses, employee training at 15 businesses, help accessing broadband at 14 businesses, and business coaching at 11 businesses.

Which of the following types of assistance would be the most helpful to your company?



Sixty-eight businesses indicated the paycheck protection program aided their business the most in the last 18 months. Thirteen businesses indicated “other” sources, for example, federal monies and NORI COVID as aiding their businesses. Eleven businesses indicated state grant programs, ten indicated local grant programs, and two selected the EIDL program as aiding their business. Across the region, the PPP aided 35 Garrett county businesses and 30 Washington county businesses.

### What government program aided your business the most in the last 18 months?



Businesses were also asked what government program hurt their business the most in the last 18 months. This open-ended question received 21 responses from businesses indicating that the unemployment/government subsidies hurt their businesses the most. Seven indicated the shutdown of non-essential businesses that occurred and a total of 26 businesses listed other reasons that government programs hurt their business from the eviction moratorium, covid mandates, future vaccine mandates, steady changes in guidance and information was at times more disruptive then productive as well as a few indicating there were no grants available for their businesses.

The key takeaway is that most businesses do not feel that their productivity has reached pre-pandemic levels. This could be alleviated by hiring new employees or adopting more innovative solutions to increase productivity, however the adoption of new technologies also requires investments in employee training. In order to better survive the next pandemic or similar catastrophic event, TCCWMD and the departments of economic development should work together to better expand the availability of workers in our region, conduct outreach and education for promoting digital workspaces and collaborate on training opportunities to help employers adopt innovative solutions.

The three-county survey received responses from a small number of business within the region. These businesses were reached through the joint efforts of the Council and the economic development offices of Allegany, Garrett, and Washington counties. Each of the individual county economic development agencies also gathered data by interviewing existing businesses, large and small, government agencies and municipalities to determine the impact of the coronavirus pandemic. Together, this information develops an economic recovery and resiliency plan to complement the Tri-County Council for Western Maryland’s Comprehensive Economic Development Strategy (CEDS).

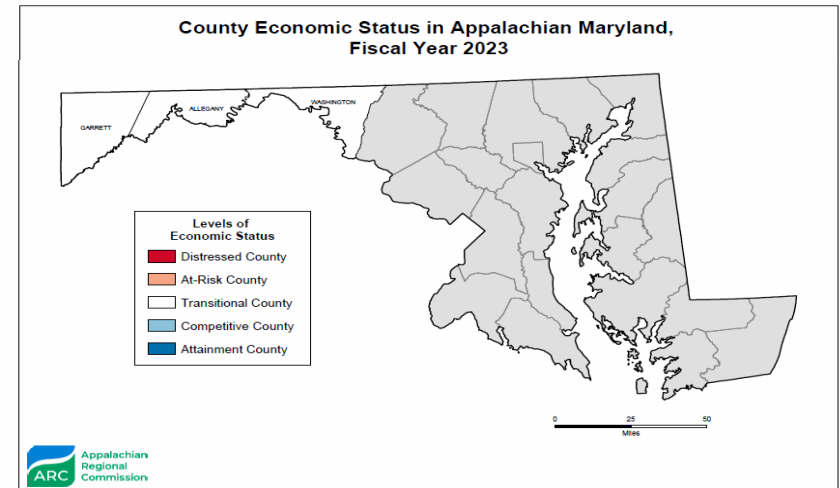
## Measuring Resilience

### 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 FY2023.

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.<sup>11</sup>



### Distressed Designation and County Economic Status Classification System

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 2023. The maximum ARC match rate for projects funded in the county is **50%**. This county has **5 distressed areas** in fiscal year 2023.

**Garrett County, Maryland** is designated as a **transitional county** in fiscal year 2023. The maximum ARC match rate for projects funded in the county is **50%**. This county has **0 distressed areas** in fiscal year 2023.

**Washington County, Maryland** is designated as a **transitional county** in fiscal year 2023. The maximum ARC match rate for projects funded in the county is **50%**. This county has **6 distressed areas** in fiscal year 2023.

## Brief Economic Facts by County



Garrett 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. The Census projects population 2020 as 28,852. The median age is 46.2 years. Of the 15,274 civilian force the unemployment rate is 6.2% in June 2021 as a result of the COVID-19 Pandemic.

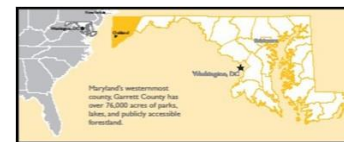
The County is home to 7 elementary; 3 middle/combined; and 2 high schools enrolling 3,502 students. The student teacher ratio is 12.2:1 with a 90.2% graduation rate for high school diploma. Of adults 25 and over, 23.5% hold a Bachelor's degree or more. There are 5 nonpublic schools as well as the two-year institution Garrett College with an enrollment of 625 offering 110 degrees.

Garrett County is home to six industrial/business parks strategically located throughout the County with access to major highways and underlying infrastructure. Garrett County is a designated HUBZone (Historically Under-utilized Business) by the U.S. Small Business Administration. Incubator space is also available to new and technology-based businesses. Located at Garrett College, Garrett Information Enterprise Center (GIEC) serves as Business Incubator.

There are ten state parks located within the County. Grantsville and Oakland are designated Arts & Entertainment Districts.

The county is accessible by MD Route 135 and 495; US40, US50 and US219; 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.

Municipalities include: Accident, Deer Park, Friendsville, Grantsville, Kitzmiller, Loch Lynn Heights, Mountain Lake Park, and Oakland.<sup>12</sup>



## GARRETT COUNTY List of Top 20 Employers 2021

Garrett Regional Medical Center	512
Beitzel / Pillar	480
Walmart	315
ClosetMaid	240
EPT Ski Properties / Wisp Resort	220
Goodwill Retirement Community	200
Arrowhead	190
Garrett County Community Action Committee	185
First United Bank	180
Total Biz Fulfillment	172
Garrett College	161
Appalachian Parent Assoc.	156
Lowes	130
Dennett Road Manor	122
Phenix Technologies	120
Garrett Container System	110

### Labor Availability

#### Civilian Labor Force (2021 avg)

	By County	LMA*
Total civilian labor force	15,365	118,327
Employment	14,561	111,673
Unemployment	804	6,654
Unemployment rate	5.2%	5.6%

	Number	Percent
Residents commuting outside the county to work (2016-2020)	1,256	10.7%

\*Labor Market Area includes Garrett, Allegany and Washington counties, MD



Allegany County is situated in the heart of Western Maryland equidistant from Baltimore, Washington, DC and Pittsburgh, PA. According to the US Census Bureau, population has grown county-wide from 74,930 in 2000 to 75,087 in 2010. The Census projects population in 2020 as 70,057. The median age is 41.7 years. Of the 30,835 civilian labor force the unemployment rate is 7.4%

in June 2021 as a result of the COVID-19 Pandemic.

The county is home to 14 elementary; 4 middle; 3 high; and 1 career/tech schools enrolling 8,132 students. The student teacher ratio is 13.2:1 with a 89.8% graduation rate for high school diploma. Of adults 25 and over 19.3% hold a Bachelor's degree or more. There are 10 nonpublic schools as well as the two-year institution Allegany College of Maryland with an enrollment of 2,523 offering 636 degrees and the four-year institution Frostburg State University with an enrollment of 4,119 offering 1,277 degrees.

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.

There are four state parks located within the County. Cumberland and Frostburg are designated Arts & Entertainment Districts.

The county is accessible by I68, US40, and US220. 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.

Municipalities include: Barton, Cumberland, Frostburg, Lonaconing, Luke, Midland, and Westernport.<sup>12</sup>



## ALLEGANY COUNTY List of Top 20 Employers 2021

Western Maryland Health System	2200
Frostburg State University	890
Hunter Douglas Northeast	900
American Woodmark	570
Allegany College of Maryland	510
CSX Transportation	500
Rocky Gap Casino Resort	500
Walmart	500
WebstaurantStore	500
Conduent	380
Giant Food Stores/Martin's	380
Aspira	325
Federal Correction Institute	305
Belt Group	250
CareFirst	230
U.S. Army Reserve	215
Hamilton Telecommunications	195
Friends Aware	195

### Labor Availability

#### Civilian Labor Force (2021 avg)

	By County	LMA*
Total civilian labor force	30,504	118,327
Employment	28,538	111,673
Unemployment	1,966	6,654
Unemployment rate	6.4%	5.6%

	Number	Percent
Residents commuting outside the county to work (2016-2020)	1,491	6.1%

\*Labor Market Area includes Garrett, Allegany and Washington counties, MD



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. The Census projects population in 2020 as 151,146. The median age is 40.5 years. Of the 72,703 civilian labor force the unemployment rate is 6.6% in June 2021 as a result of the COVID-19 Pandemic.

The county is home to 25 elementary; 8 middle/combined; 7 high; and 1 career/tech schools enrolling 22,171 students. The student teacher ratio is 14.8:1 with a 88.1% graduation rate for high school diploma. Of adults 25 and over 22.4% hold a Bachelor's degree or more. There are 31 nonpublic schools as well as the two-year Hagerstown Community College with an enrollment of 3,433 offering 775 degrees.

Washington County is home to 20 business and industrial parks concentrated in the Hagerstown and Williamsport areas to ease access to I70 and I81. State Enterprise Zones and Foreign Trade Zones are available within the county and provide incentives for investment. Located at Hagerstown Community College, David W. Fletcher Incubator & Labs serves as Business Incubator.

There are state and national parks located within the County. Hagerstown is a designated Arts & Entertainment Districts.

The county is accessible by I81, I70, I68, US40, and US11 highways. Rail freight includes CSX Transportation and Norfolk Southern Railway. The area is served by the Port of Baltimore and Hagerstown Regional Airport.

Municipalities include: Boonsboro, Clearspring, Funkstown, Hagerstown, Hancock, Keedysville, Sharpsburg, Smithsburg, and Williamsport.<sup>12</sup>



## WASHINGTON COUNTY List of Top 20 Employers 2021

Meritus Health	2740
FiServ	2185
Volvo Group	1611
Amazon	1500
Citi	925
FedEx Ground	900
The Bowman Group	830
Walmart	565
Hagerstown Community College	545
Merkle Response Management Group	545
Arc of Washington County	500
Brook Lane Health Services	485
Giant Food Stores/Martin's	465
Direct Mail Processors	450
Dot Foods	440
Staples	390
A.C. & T.	375
Homewood Retirement Centers	350
Lehigh Phoenix	335
Sierra Nevada	335

### Labor Availability

#### Civilian Labor Force (2021 avg)

	By County	LMA*
Total civilian labor force	72,458	118,327
Employment	68,574	111,673
Unemployment	3,884	6,654
Unemployment rate	5.4%	5.6%

	Number	Percent
Residents commuting outside the county to work (2016-2020)	14,330	24.6%

\*Labor Market Area includes Garrett, Allegany and Washington counties, MD



## **Prioritized List of Projects**

### **Methodology**

Tri County Council for 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 Department of Business Development, and Washington County Office of Grants 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 all of the government agencies, non-profit organizations, municipalities and education 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 changed 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 completed 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 Appalachian Regional Commission and/or 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.



## PRIORITY LIST FY 2023

### AREA DEVELOPMENT PROJECTS

	Project Name	County	ARC	Other Federal	Local/State	Private	TOTAL
1	<u>Cumberland Chase Water Booster Pump</u>	Allegany	\$400,000	\$0	\$400,000	\$0	\$800,000
2	<u>Garrett College IT Infrastructure Project VI</u>	Garrett	\$50,000	\$0	\$50,000	\$0	\$100,000
3	<u>Hagerstown Wastewater Treatment Plant I &amp; I</u>	Washington	\$250,000	\$0	\$250,000	\$0	\$500,000
4	<u>Regional Science Center-Challenger Learning Center</u>	Allegany	\$500,000	\$0	\$500,000	\$0	\$1,000,000
5	<u>Outdoor Leadership &amp; Adventure Education Summer Apprenticeship Program</u>	Garrett	\$7,500	\$0	\$7,500	\$0	\$15,000
6	<u>Boonsboro Alternate Route 40 Waterline Looping</u>	Washington	\$200,000	\$0	\$1,000,000	\$0	\$1,200,000
7	<u>Workforce Training Theatre Enhancement</u>	Allegany	\$150,000	\$0	\$150,000	\$0	\$300,000
8	<u>GCAC Community-Wide Engagement and Feasibility Study to Support \$SMART ART Program Development/Business Model/Plan</u>	Garrett	\$30,000	\$0	\$30,000	\$0	\$60,000
9	<u>Hagerstown Health HUB</u>	Washington	\$100,000	\$0	\$0	\$100,000	\$200,000

	Project Name	County	ARC	Other Federal	Local/State	Private	TOTAL
10	<b><u>STEM Camp – Allegany and Garrett Students</u></b>	Allegany	\$13,000	\$0	\$0	\$13,000	\$26,000
11	<b><u>Kitzmiller Economic Development Strategy &amp; Plan</u></b>	Garrett	\$15,000	\$0	\$15,000	\$0	\$30,000
12	<b><u>Brook Lane TMS Program</u></b>	Washington	\$93,000	\$0	\$0	\$93,000	\$186,000
13	<b><u>Robotics Program Class Packs</u></b>	Allegany	\$15,000	\$0	\$0	\$15,000	\$30,000
14	<b><u>Business Park-Stormwater Management</u></b>	Garrett	\$150,000	\$0	\$150,000	\$0	\$300,000
15	<b><u>“Rebooting” the Museum School</u></b>	Washington	\$26,325	\$0	\$0	\$26,325	\$52,650
16	<b><u>Robotics Kits and Esports</u></b>	Allegany	\$60,000	\$0	\$60,000	\$0	\$120,000
17	<b><u>Recovery Housing</u></b>	Garrett	\$480,000	\$0	\$480,000	\$0	\$960,000
18	<b><u>Upgrade Hagerstown WW Pump Station 13</u></b>	Washington	\$530,000	\$0	\$3,270,000	\$0	\$3,800,000
19	<b><u>Data Network Upgrade Initiative</u></b>	Allegany	\$50,000	\$0	\$50,000	\$0	\$100,000
20	<b><u>Wisp Mountain Water Storage Tank</u></b>	Garrett	\$470,000	\$0	\$1,530,000	\$0	\$2,000,000
21	<b><u>Hydraulic Model of Hagerstown WW Sewer Shed</u></b>	Washington	\$110,000	\$0	\$110,000	\$0	\$220,000
22	<b><u>Mountain Maryland Traditional Arts Education Program and Exhibits</u></b>	Allegany	\$87,000	\$0	\$64,000	\$64,500	\$215,500

	Project Name	County	ARC	Other Federal	Local/State	Private	TOTAL
23	<u>Willson Water Treatment Plant Piping &amp; Valve Update</u>	Washington	\$1,000,000	\$0	\$4,000,000	\$0	\$5,000,000
24	<u>Elevator Repair and Window Replacement at Humpty Dumpty</u>	Allegany	\$72,500	\$0	\$0	\$72,500	\$145,000
25	<u>Virtual Anatomy Lab</u>	Washington	\$200,000	\$0	\$0	\$200,000	\$400,000
26	<u>Enhancing Virtual Workforce Education in Appalachian Maryland</u>	Allegany	\$55,000	\$0	\$0	\$55,000	\$110,000
27	<u>Rehabilitation of Miller Lumber and Cline House</u>	Washington	\$450,000	\$0	\$450,000	\$900,000	\$1,800,000
28	<u>Purchase of an NMR Spectrometer</u>	Allegany	\$87,500	\$0	\$0	\$87,500	\$175,000
29	<u>R. Paul Smith Boulevard Extension</u>	Washington	\$750,000	\$0	\$750,000	\$0	\$1,500,000
30	<u>Training Development for SUD</u>	Allegany	\$50,000	\$0	\$0	\$50,000	\$100,000
31	<u>Antietam Street Parking Deck</u>	Washington	\$1,000,000	\$0	\$8,000,000	\$0	\$9,000,000
32	<u>Western Maryland Regional Export Initiative-Certifications and Conference</u>	Allegany	\$5,000	\$0	\$0	\$5,000	\$10,000
33	<u>Center for Product Design and Advanced Manufacturing Operating Budget</u>	Allegany	\$50,000	\$0	\$0	\$50,000	\$100,000
	<b><u>Total</u></b>		<b>\$7,506,825</b>	<b>\$0</b>	<b>\$21,316,500</b>	<b>\$1,731,825</b>	<b>\$30,555,150</b>

## Strategic Goals and Objectives

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:** Support business expansions and increase start-ups and entrepreneurship.

**State Strategy 1.1.1:** Provide training, investment leads, and technical assistance for businesses and entrepreneurs.

**State Strategy 1.1.2:** Support efforts to improve access to capital for businesses.

**State Strategy 1.1.3:** Provide the infrastructure to support businesses in the region.

**State Objective 1.2:** Prepare for the economic development of the next century and attract new businesses.

**State Strategy 1.2.1:** Identify areas for development of research and testing facilities for new technology.

**State Strategy 1.2.2:** Facilitate the development of research and testing facilities and workforce training for new technology.

**State Strategy 1.2.3:** Support and promote agri-tourism and agricultural and other resource based businesses based on regional needs and demands.

**State Strategy 1.2.4:** Provide technical assistance and support development of plans and studies.

**State Objective 1.3:** Support reinvestment in existing communities throughout the region.

**State Strategy 1.3.1:** Work in partnership with local jurisdictions to support projects that encourage revitalization and reinvestment.

**State Strategy 1.3.2:** Provide the necessary infrastructure for revitalization and reinvestment.

**State Strategy 1.3.3:** Increase workforce and affordable housing stock.

**State Objective 1.4:** Increase international exports from the ARC region.

**State Strategy 1.4.1:** Provide training and technical assistance for businesses.

**State Strategy 1.4.2:** Develop programs that will assist in marketing and business development on an international level.

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

**State Objective 2.1:** Support and promote educational programs that will prepare students for jobs in the 21<sup>st</sup> century.

**State Strategy 2.1.1:** Expand and support the P-Tech model and K-12 STEM, and active learning labs in preparing students for 21<sup>st</sup> century jobs.

**State Strategy 2.1.2:** Work with local employers to create and expand apprenticeships and other school to work transition programs.

**State Strategy 2.1.3:** Work to create and support programs directed toward postsecondary access and success.

**State Objective 2.2:** Expand partnerships among local schools, colleges, and businesses to support workforce development and improve workforce readiness.

**State Strategy 2.2.1:** Provide continuing education training in advanced skills for workers in the region.

**State Strategy 2.2.2:** Work with local employers to create and expand apprenticeship programs.

**State Strategy 2.2.3:** Work with local businesses to develop programs that will encourage workers to take advantage of post-secondary education programs.

**State Strategy 2.2.4:** Support training for displaced workers and formerly incarcerated individuals.

**State Objective 2.3:** Provide support for recovery ecosystem.

**State Strategy 2.3.1:** Develop workforce training and job placement programs for those recovering from a substance misuse disorder.

**State Strategy 2.3.2:** Support transportation opportunities for individuals recovering from substance dependence in their reentry to the workforce.

**State Strategy 2.3.3:** Support temporary housing options for patients in recovery programs and returning to the workforce.

**State Objective 2.4:** Provide support for a strong, accessible health network.

**State Strategy 2.4.1:** Support training and education programs for healthcare professionals.

**State Strategy 2.4.2.:** Increase access to healthcare.

**State Strategy 2.4.3:** Support projects for healthcare prevention and wellness.

**State Strategy 2.4.4:** Support programs that address substance dependence.

**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:** Develop and support basic infrastructure and facilities needed to support community and economic development.

**State Strategy 3.1.1:** Develop and improve water systems to ensure that residents and businesses have clean water.

**State Strategy 3.1.2:** Develop and improve wastewater systems for residents and businesses.

**State Strategy 3.1.3:** Develop and implement a combined stormwater overflow systems to ensure compliance with state and federal regulations.

**State Objective 3.2:** Continue the development of a modern communications network.

**State Strategy 3.2.1:** Increase access to broadband.

**State Strategy 3.2.2:** Develop, support, and maintain infrastructure for broadband and digital communications.

**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 road that will support primary highway development and yield an integrated network of road transit in the region.

**State Strategy 3.3.3:** Support development of key transportation corridors (highway, rail, aviation) that enhance economic development.

**State Strategy 3.3.4:** Support multimodal transportation options.

**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.

**State Objective 4.2:** Support and enhance the outdoor recreation economy.

**State Strategy 4.2.1:** Support the expansion of outdoor recreation opportunities.

**State Strategy 4.2.2:** Assist in development of tourism opportunities related to outdoor recreation.

**State Objective 4.3:** Enhance and protect historic and cultural resources.

**State Strategy 4.3.1:** Support programs to identify, enhance and preserve Maryland’s heritage and cultural resources.

**State Strategy 4.3.2:** Assist in development of tourism opportunities related to historic and cultural resources.

**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:** Strengthen leadership skills and capacity.

**State Strategy 5.1.1:** Support programs that provide training in leadership development for youth, interested citizens, and community leaders.

**State Strategy 5.1.2:** Support programs that provide management skills to nonprofit organizations.

**State Objective: 5.2:** Promote collaborative partnerships.

**State Strategy 5.2.1:** Support groups, meetings and workshops that provide opportunities for cooperation and capacity building.



## Sources:

- <sup>1</sup> Prepared by Maryland Department of Planning from U.S. Census Bureau County Population Division, March 2022
- <sup>2</sup> The Great Recession's official starting and ending dates are December 2007 through June 2009
- <sup>3</sup> Prepared from U.S. Census Bureau, American Community Survey 1 Year Estimates, 2021 release
- <sup>4</sup> Maryland Department of Labor, Licensing and Regulation, [www.dllr.maryland.gov/Imi](http://www.dllr.maryland.gov/Imi)
- <sup>5</sup> Frostburg State Recognized in Princeton Review's Latest Green Colleges Guide [www.frostburg.edu/news/](http://www.frostburg.edu/news/)
- <sup>6</sup> Maryland Department of Commerce Brief Economic Facts 2022; DLLR Office of Workforce Information and Performance
- <sup>7</sup> Mountain Maryland Tech Network [www.facebook.com/groups/MountainMDTechNetwork/about/](https://www.facebook.com/groups/MountainMDTechNetwork/about/)
- <sup>8</sup> Garrett County Emergency Management Office [www.garrettcounty.org/emergency-services/home](http://www.garrettcounty.org/emergency-services/home)
- <sup>9</sup> Allegany County Department of Emergency Services [gov.allconet.org/l68/Emergency-Services](http://gov.allconet.org/l68/Emergency-Services)
- <sup>10</sup> Washington County Emergency Management Office [www.washco-md.net/EmergencyServices/eman\\_home.shtm](http://www.washco-md.net/EmergencyServices/eman_home.shtm)
- <sup>11</sup> Appalachian Regional Commission County Economic Status and Distressed Areas in Appalachia [www.arc.gov](http://www.arc.gov)
- <sup>12</sup> Maryland Department of Commerce Brief Economic Facts 2019; [www.statsamerica.org](http://www.statsamerica.org); USA Counties in Profile 2020

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