

**FISCAL YEAR 2022 ANNUAL REPORT
OF THE**



**As required by §2.5-207(a), Economic Development Article,
Maryland Annotated Code**

Respectfully submitted to the General Assembly of Maryland by

Dr. Margaret Wood, PMP and J. Edward Coleman, Co-Chairs

Secretary R. Michael Gill, Commerce

401 East Pratt Street

Baltimore, MD 21202

January 2023



Larry Hogan, Governor | Boyd Rutherford, Lt. Governor

OPEN *for* Business

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MEDC Background

On April 28, 2015, Governor Larry Hogan signed into law House Bill 943, which restructured the Maryland Department of Business and Economic Development and renamed it the Maryland Department of Economic Competitiveness and Commerce. The Department was then renamed the Department of Commerce (Commerce) by Executive Order effective on October 1, 2015, the same date the legislation became effective. The legislation also reformed the Maryland Economic Development Commission (MEDC) by expanding its membership and role. Under the legislation, which became Sections 2.5-201 through 2.5-207 of the Economic Development Article of the Maryland Annotated Code, the purpose of the Commission is to:

- 1) establish economic development policy in the State;
- 2) advise the Commerce Secretary on economic policy in the State;
- 3) oversee the operations of the Department and its units including the Department's efforts to support the creation of, attract, and retain businesses and jobs; and
- 4) monitor the operations of the Maryland Technology Development Corporation, the Maryland Economic Development Corporation, and the Maryland Public-Private Partnership Marketing Corporation, including the efforts of those entities to support the creation, attraction, and retention of businesses and jobs.

Membership

The MEDC is comprised of 25 voting members from all regions of Maryland, appointed by the Governor, Senate President, and House Speaker, two non-voting members, one appointed by the Senate President and one by the House Speaker; and four non-voting ex-officio members who represent Commerce, the Department of Labor, the Maryland Economic Development Corporation (MEDCO), and the Technology Development Corporation. (TEDCO). The Commission is responsible for developing economic policy recommendations that foster economic growth and increase Maryland's competitiveness. Commission members work with the Administration, Commerce, the General Assembly, Maryland's business community and the public to advocate pro-business policies. (See Appendix A for membership listing.)

Two (2) Co-Chairs lead the Commission: Dr. Margaret Wood, PMP, President/CEO, WOOD Consulting Services, Inc. a technology and strategic solutions firm and J. Edward Coleman, Board Member, Ameren, a regulated electric and gas delivery company. Secretary R. Michael Gill rejoined the Department in January of 2022. Secretary Gill, a business leader with four decades of experience as an entrepreneur, technology executive, investment banker, and public servant, directs the implementation of strategies to foster economic growth and increase Maryland's competitiveness.

Subcommittees

The Commission has two standing informal Subcommittees. The Strategic Plan Subcommittee, co-chaired by Aris Melissaratos and Laura Neuman and the Rankings and Research Subcommittee, chaired by Elizabeth Rendón-Sherman.

In 2019, upon a thorough review of the 2016 Strategic Plan, the Commission found that current strategies were in alignment with achieving the goals of the Plan and therefore re-endorsed the Plan with a few new focus areas. The Commission recommended the Department focus on driving innovation/technology transfer, outreach, and increased storytelling of programs and the advantages of a Maryland business location. These strategies continued to be the focus of the Department in 2022.

The Rankings and Research Subcommittee led by Chair Elizabeth Rendón-Sherman, continued to revisit the Scorecard of Rankings to track relevant indicators of the State's competitiveness, business attraction,

and retention which was presented at Commission meetings. The reevaluation led to the development of a new Maryland Rankings Report, (see Appendix B), a new online dashboard of high-frequency economic data (i.e., employment by industry, the housing market, and venture capital), hosted on the Commission's webpage and a new Maryland Neighborhoods Needs Index (MNNI) to annually assess the needs of Maryland's communities. See online Dashboard:

<https://commerce.maryland.gov/commerce/dashboard-of-key-economic-indicators-tracked-by-medc>

2022 Meetings

The Commission held meetings on February 15, May 11, August 16, and December 13, 2022. All meetings were held in person with some Commissioners electing to call into the meeting. The February meeting was held at Anne Arundel Community College, the May meeting was held at Rocky Gap Casino Resort, the August meeting was held at Visit Baltimore and the December meeting was held in the Governor's Reception Room in Annapolis. (Meeting Minutes found in Appendices C-F.)

2023 Meetings

2023 meeting dates, agendas and minutes will be posted on the Department of Commerce website.

Closing Statement

Throughout 2022, as the State began recovery from the global COVID-19 pandemic, the Department of Commerce remained focused on driving innovation, increasing outreach and the storytelling of business programs and opportunities while also assisting recovering businesses, retention, and attraction. Through these efforts under the leadership of Secretary Gill, the State has received significant interest from out-of-state and international businesses, expansion opportunities by Maryland businesses and innovative new start-ups, all activity leading to job growth and strengthening Maryland's economy.

The Commission will continue to review Annual Reports, monitor the new Maryland Rankings Report, Economic Data Dashboard and Needs Assessment Report. These reviews, while engaging with the Department, will allow the Commission to evaluate and advise the Department, Commerce Secretary and Administration on strategies and tactics to position the Department as an operational center of excellence to support robust economic prosperity throughout the state.

APPENDIX A

MEDC VOTING AND NON-VOTING MEMBERS

Dr. Margaret Wood, Co-Chair, PMP, President and Chief Executive Officer, WOOD Consulting Services, Inc.

J. Edward Coleman, Co-Chair, Board Member Ameren

Kenneth R. Banks, President, Chief Executive Officer and Founder, Banks Contracting Company, Inc.

Susan Chambers, President/Chief Executive Officer, Strouse

Augie Chiasera, Regional President, M&T Bank

Annemarie Dickerson, Owner, Francis Scott Key Family Resort

Kai Hirabayashi, Senior Manager of Public Policy, Amazon

Arnold Jablon, Esq., Senior Counsel, Venable, LLP

Manish Kothari; President/Chief Executive Officer, Sheladia Associates, Inc.

Julie Lenzer, Chief Innovation Officer, University of Maryland

Gwen McCall, President, F&L Construction and Solid Waste, LLC

Aris Melissaratos, Vice President of Corporate Education & Leadership Development, St. John Properties

Michael Miller, President, OGOS Energy, LLC

Laura Neuman, Entrepreneur

Melissa Noel, Chief Executive Officer, Noel's Fire Protection, LLC

Jeanette Glose Partlow, President, Maryland Chemical Company

Leon Pinkett, III; Executive Director, Baltimore Arts Realty Corporation (BARCO)

Saif Rehman, PhD, Chief Executive Officer, NextGen Consulting, Inc.

Elizabeth Rendón-Sherman, Chief Executive Officer/Chief Financial Officer, LG-TEK

Gary Ruddell, Chief Executive Officer, President, Total Bix Fulfillment, Inc.

Shawn Salta, President and Chief Operating Officer, DirectMail.com

Eugene Silverman, PhD, Founder and President, Berkeley Springs Instruments

Robert L. Wallace, President and Chief Executive Officer, BITHGROUP Technologies

Non-voting ex-officio Members

R. Michael Gill; Secretary, Department of Commerce

Tiffany Robinson; Secretary Department of Labor

Brian J. Feldman; Senator, District 15, Montgomery County

Brian Crosby, Delegate, District 29B, St. Mary's County

Tom Sadowski, Executive Director of Maryland Economic Development Corporation (MEDCO)

Troy LeMaile-Stovall; CEO and Executive Director, Maryland Technology Development Corporation (TEDCO)

Commerce Support:

Julie Woepke, Executive Director, MEDC, Office of the Secretary

APPENDIX B –Maryland Rankings Report - Attached

APPENDIX C



February 15, 2022
Anne Arundel Community College
Room 219 Cade Building, Arnold
12:00pm – 2:00pm
Minutes

Commissioners in attendance:

Margaret Wood, D.A. PMP
Ed Coleman
Susan Chambers
Augie Chiasera
Manish Kothari
Julie Lenzer
Aris Melissaratos
Gwen McCall
Leon Pinkett III
Elizabeth Rendón-Sherman
Gary Ruddell
Saif Rehman, PhD
Eugene Silverman, PhD

Co-Chair, WOOD Consulting
Co-Chair, Ameren
Strouse
M&T Bank
Sheladia Associates, Inc.
Advanced Regenerative Manufacturing Institute
St. John Properties
F&L Construction and Solid Waste, LLC
Baltimore Arts Realty Corporation (BARCO) – call in
LG TEK
Total Biz Fulfillment
NexGen Consulting
Berkeley Springs Instruments

Ex-Officio Members:

Secretary R. Michael Gill
Tom Sadowski
Troy LaMaile-Stovall

Department of Commerce
Maryland Economic Development Corporation (MEDCO)
Maryland Technology Development Corporation (TEDCO)

Guests:

Dr. Dawn Lindsay
Sandy Jones
Alex Choi
Hunter Marsh
Erika Schissler
Emily Haskel
Jim Rzepkowski

Anne Arundel Community College
Anne Arundel Community College
Office of the Governor – call in
Office of Delegate Brian Crosby, District 29B – call in
Maryland Legislative Services – call in
Maryland Legislative Services – call in
Department of Labor

Commerce Staff:

Julie Woepke
Tom Riford
Liz Fitzsimmons
Kyle McColgan
Jayson Knott

MEDC Executive Director
Assistant Secretary- call in
Managing Director
Chief of Staff
Senior Director

James Palma
Michael Siers
Melissa Brown
Sarah Sheppard

Research Director – call in
Economist
Policy Analyst
Workforce Director

I. Call to Order

Dr. Margaret Wood, Co-Chair called the meeting to order at 12:02 pm and introduced Anne Arundel Community College President Dr. Dawn Lindsay. Her bio was included in the meeting materials.

II. Welcome

Dr. Dawn Lindsay, the sixth President of Anne Arundel Community College welcomed the Commissioners and attendees. She provided background on the College, emphasizing the public private partnerships to address workforce needs and announced the establishment of the new Clauson Center for Innovation and Skilled Trades to prepare students for the changing job market. She thanked the State for its support of College Programs and facilities and collaborations with the business community.

III. Introduction of 2021 Members

Co-Chair Wood invited those new Commissioners as of 2021 to provide introductions of themselves and their businesses.

IV. Review and approval of November 16, 2021 Meeting Minutes

Upon a motion duly made and seconded, the November 16, 2021 meeting minutes approved.

V. Rankings & Research Subcommittee

Commissioner Elizabeth Rendón-Sherman, Chair, Rankings and Research Subcommittee addressed the Commission and reported that the new Rankings Report had been updated since the last meeting to include information on apprentices, community college enrollment, and associate degree attainment. She added that the Report, Dashboard and Maryland Neighborhood Needs Index (MNNI) was reviewed by Secretary Gill and the Commerce Subcabinet and there were no additional changes suggested. Lastly, Ms. Rendón-Sherman reported that the Research Team is working with the Marketing and Communications team to have the dashboard embedded on the MEDC website for easy access by Commissioners.

Referencing the new Ranking Report, she reported:

- Since the last meeting, Maryland's economic recovery has continued:
 - o Unemployment rate now sits at 5.0%, down from 5.9% since the November meeting.
 - o The state has continued to add jobs. In October, November, and December, Maryland added a combined 30,600 jobs.
- New Rankings updates: According to a new study by the Council on State Taxation, Maryland ranks #1 and has the lowest share of state and local taxes paid by businesses. Maryland also ranks fifth overall in terms of the lowest state and local business taxes paid per dollar of net government spending that benefits businesses. This ranking is down from #1 in 2020, but the State's position is still strong.

VI. Department of Commerce Update

Commerce Secretary R. Michael Gill, addressed the Commission and provided an overview of the progress of the Department and Commission since the beginning of the Hogan-Rutherford Administration. Among the items he discussed were the 2016 Strategic Plan; Commerce Subcabinet and its subsequent expansion; Customer Service Promise and Initiative; Maryland Marketing Partnership; Scorecard; key and emerging industries; additional focus on regionalism; promotion of the Department programs and impacts; and the importance of finishing strong. He then introduced Economist Mike Siers to review the unemployment rate, total employment and manufacturing employment spanning 2015 to present.

MEDC Executive Director Julie Woepke addressed the Commission and reported that the Secretary and the Business Development Team will be actively on the road. She reviewed the number of speaking and meeting requests and highlighted several upcoming Marketing Events.

Mr. Jayson Knott, Senior Director, Business Attraction, addressed the Commission and described the latest Business Attractions and Expansion Opportunities. He described the recent wins; existing pipeline; breakdown by region of the number of opportunities, prospective jobs, capital expenditure and opportunities of at least 35 jobs. He answered questions from the Commission including commonalities with life sciences and manufacturing opportunities; data centers and impact from recent legislation; and the impact of more jobs for Marylanders legislation attracting new projects.

Ms. Liz Fitzsimmons, Managing Director, Office of Tourism Film addressed the Commission and provided an update on the impact of the pandemic on Maryland visitor spending, sales tax revenue, and workforce. She also provided bright spots on the tourism horizon highlighting a number of upcoming events, promotions and initiatives. She answered questions from the Commissioners.

Ms. Melissa Brown, Policy Analyst, continued the Commerce Presentation by describing the 2022 legislative priorities and the Department's Budget Priorities. Co-Chair Wood stated that as per Statute requirement, the Department's Budget was reviewed and accepted prior to being submitted. No questions were asked of Ms. Brown.

All presentations on file.

VII. Workforce and Economic Development – Building a Strong Workforce

Sarah Sheppard, Senior Director, Education and Workforce, Department of Commerce addressed the Commission and presented an overview of her role in coordination with industry sectors and workforce partners to identify and initiate programs to support businesses. She highlighted work with the Life Sciences and Manufacturing Advisory Boards, Cybersecurity partners, and TEDCO among others. She noted the successful Maryland Workforce Expressway which provides a central location for all workforce related programs and resources for employers and job seekers.

Ms. Sheppard then introduced Assistant Secretary Jim Rzepkowski, Division of Workforce Development & Adult Learning of the Department of Labor who provided a review of the collaborative Federal Build Back Better Grant application as part of the Good Jobs Challenge focused on wind energy. He described the partners involved which included both public and private sector. He said an announcement is anticipated in May/June timeframe.

Assistant Secretary Rzepkowski then provided a comprehensive description of the State's apprenticeship programs, opportunities for businesses, program statistics and an overview of the Governor's Fiscal Year 2023 Budget for related programs. He answered questions from the Commissioners.

Ms. Sandy Jones, Assistant Dean, Continuing Education and Workforce Development, Anne Arundel Community College, addressed the Commission and provided an overview of the role of the 16 Community Colleges with workforce preparedness; programs to address workforce shortages; licensure and certificate programs by industry; a description of the new Clauson Center for Innovation and Skilled Trades; and partners in workforce development. She then answered questions from the Commissioners.

All presentations on file.

VIII. Good of the Order

Commissioner Gary Ruddell highlighted a supply chain issue impacting a number of small and large businesses due to shipping and activity at the Port of Baltimore. He stated Secretary Gill is organizing a meeting with the Port Administration Executive Director, Bill Doyle to discuss the issues and potential remedies. No additional information was exchanged.

IX. 2022 Meetings: The remaining meeting dates were announced: 5/17/22, 8/16/22, 11/15/22

X. Adjournment

Upon a motion duly made and seconded, the meeting adjourned at 2:15pm.

APPENDIX D



May 11, 2022

Rocky Gap Casino Resort, Allegany Center Side A
16701 Lakeview Road NE, Flintstone
12:00pm – 2:00pm
Minutes

Commissioners in attendance:

Ed Coleman
Margaret Wood, D.A. PMP
Susan Chambers
Annmarie Dickerson
Jeanette Glose Partlow
Arnold Jablon
Gwen McCall
Melissa Noel
Laura Neuman
Leon Pinkett III
Saif Rehman
Elizabeth Rendón-Sherman
Gary Ruddell
Eugene Silverman, PhD
Robert Wallace

Co-Chair, Ameren
Co-Chair, WOOD Consulting
Strouse
King Cole Farm – Call in
Maryland Chemical, Inc. – Call in
Formerly with Venable, LLP – Call in
F&L Construction and Solid Waste, LLC
Noel Fire Protection, LLC
Entrepreneur
Baltimore Arts Realty Corporation (BARCO)
NexGen Consulting, Inc. – Call in
LG TEK – Call in
Total Biz Fulfillment
Berkeley Springs Instruments
BITHGROUP Technologies – Call in

Ex-Officio Members:

Secretary R. Michael Gill
Tom Sadowski

Troy LaMaile-Stovall

Department of Commerce
Maryland Economic Development Corporation (MEDCO) – Call
in
Maryland Technology Development Corporation (TEDCO) –
Call in

Guests:

Brian Kurtz
Al Delia
Patrick Kelly
Lucas Cade
Erika Schissler
Emily Haskel
Hunter Marsh
Ashli Workman
Cheryl DeBerry
Kim Durst
Connor Norman

Rocky Gap Casino Resort
Frostburg State University
FirstEnergy
FirstEnergy
Maryland Legislative Services – Call in
Maryland Legislative Services – Call in
Delegate Crosby – Call in
Allegany County
Garrett County
Garrett County
Garrett County

Commerce Staff:

Julie Woepke	MEDC Executive Director
Tom Riford	Assistant Secretary
Kyle McColgan	Chief of Staff
Jayson Knott	Senior Director
Jessica Reynolds	Managing Director
Jennifer LaHatte	Managing Director
Michael Siers	Economist
Wade Haerle	Program Manager
Lori Ratzburg	Senior Director

I. Call to Order

Mr. Ed Coleman, Co-Chair, called the meeting to order at 12:00 pm and introduced the newest Commissioner Melissa Noel. He also acknowledged Western Maryland economic development partners, Kim Durst, Cheryl DeBerry and Connor Norman of Garrett County and Ashli Workman of Allegany County. He then offered Ms. Noel a few minutes to provide her background. Co-Chair Coleman then introduced Brian Durst of Rocky Gap Casino Resort and thanked him for hosting the meeting.

II. Welcome

Mr. Brian Kurtz, General Manager, Rocky Gap Casino Resort welcomed Commissioners and attendees.

III. Rankings & Research Subcommittee

Ms. Elizabeth Rendón-Sherman, Chair, Rankings and Research Subcommittee provided an update to the Commission on the Rankings Report since the February meeting and noted the online dashboard includes a new tab on population growth and migration by county.

Ms. Rendón-Sherman reported that Maryland has continued to recover:

- Maryland has added 12,300 new jobs over the past three months and the unemployment rate fell to 4.6%.
- The strongest sectors over the last three months have been Retail Trade, which added 4,400 new jobs, Construction, which added 3,300 new jobs, and Accommodation and Food Services which added 2,700 new jobs.
- However, some sectors have shrunk a little. There are 1,300 fewer jobs in Transportation, Warehousing, and Utilities and a loss of 1,100 jobs in both Finance as well as Administrative and Support jobs.
- Maryland's performance has been less strong than the country as a whole. The unemployment rate currently ranks 44th and job gains over the past three months ranked 46th.
- However, this growth is not out of line with neighbors. Over the last three months, Virginia had the 37th ranked growth rate, Washington DC had the 50th ranked growth rate, and West Virginia had the 49th ranked growth rate. Pennsylvania did have a faster growth rate (ranked 15th), but their overall performance over the last two years has been worse than Maryland.
- In terms of rankings, we have new items on the scorecard, including:
 - o Maryland's ranking improved on broadband access, bachelor's degree attainment, and the state poverty rate.
 - o Maryland's ranking fell in terms of population growth and average electricity price paid.

Economist Michael Siers answered questions from Commissioners related to broadband.

IV. Department of Commerce Update

Commerce Secretary R. Michael Gill, addressed the Commission and began the Department updates by emphasizing the importance of finishing the administration strong. He reported the State's economy has improved significantly since the beginning of the administration and the development and implementation of the Strategic Plan. He noted the Governor is clearly focused on finishing strong and the importance for the next administration to note the accomplishments and work to take the economy to the next level.

Secretary Gill updated the Commissioners on a recent Team Appreciation Day to emphasize finishing strong and focused. He then gave an update on the Rural 50 Fund to provide \$50 million to the five (5) Rural Regional Councils for significant economic development projects. Applications for the program will be accepted this summer and funding awarded in September, 2022.

Secretary Gill then spoke on the underlying assets of Baltimore and the need to tout successes and assets. He noted the City's brand is tarnished and stressed the importance of alignment of the office of the City, State, and Attorney General to identify what the City wants to be and implement a coordinated effort to build a City that is Clean, Pretty and Safe.

Assistant Secretary Tom Riford continued the Commerce updates by providing the latest strategies of the Maryland Marketing Partnership, that included media mix new creatives, overall performance of the marketing campaign and the new website.

Mr. Jayson Knott, Senior Director, Business Attraction, addressed the Commission and described the latest Business Attractions and Expansion Opportunities. He described the recent wins; existing pipeline; breakdown by region of the number of opportunities, prospective jobs, capital expenditure and opportunities of at least 50 jobs. Mr. Knott emphasized the seven (7) recent announcements of projects since the last meeting, noting that this has been the best year of the Department for business development.

Ms. Jessica Reynolds presented an update on the Department's International Investment and Trade activities. She reviewed strategic initiatives including a new reciprocal soft landing for Maryland businesses abroad, and upcoming live events.

Ms. Jennifer LaHatte then presented a high level overview of the 2022 legislative session. Ms. LaHatte reviewed the changes to the More Jobs for Marylanders Program, internal reporting and the new Western Maryland Economic Future Investment Board and the Senator George C. Edwards Fund. The Fund will be administered by the Western Maryland Tri-County Council for infrastructure and economic development projects in the form of grants. She then reviewed the Department Budget and noted the influx of funds for specific programs.

Mr. Wade Hearle concluded the Commerce presentation by giving an overview of the three (3) main areas of energy industry trends – Offshore Wind, Battery Technology Cluster and Small Modular Nuclear Reactor Cluster. He noted the potential for significant jobs and business opportunities for offshore wind in particular given the number of components needed in the manufacturing of the wind blades.

Commerce Team answered questions from the Commissioners related to media buy of minority owned businesses; status of the Federal Bureau of Investigation (FBI) relocation; international target markets and countries; minority contracting related to offshore wind businesses; and referrals for new business opportunities related to sustainable and renewable materials. Presentations on file.

V. Review and approval of February 15, 2022 Meeting Minutes

Upon a motion duly made and seconded, the February 15, 2022 meeting minutes approved.

VI. Economic Development in Western MD & Emerging Industries

Mr. Al Delia, Vice President for Regional Development & Engagement, Frostburg State University addressed the Commissioners and provided an overview of the economic development partnerships in Western Maryland and his role at the University which was established with special funding from the Governor. He emphasized that various organizations worked in silos and until there was alignment on the goals and vision of Western Maryland, that they finally work together as a team. He provided an overview of the regional development and engagement economic development initiatives underway; funding resources; activity of the Small Business Development Center; the new Regional Science Center/Challenger Center; engagement with the arts for cultural events; and gave examples of successes in working with leaders in Annapolis for funding. Presentation on file.

He then answered questions from the Commissioners.

VII. Energy & Economic Development

Mr. Patrick Kelly, Director, Economic Development, FirstEnergy, provided an overview on the Company and its core values. He noted FirstEnergy is one of the largest transmissions systems in the country with over 24,000 miles of lines. He focused on describing the customer centric investments, electric vehicle technology programs, greenhouse gas reduction goals; targeted economic development segments – biopharma, aerospace, agribusiness, distribution and logistics, and data centers. He continued by describing the company's role in site selection assistance, customized energy plans, and secure transmission. He also reported on the potential for broadband delivery through electric utilities to assist with reaching rural areas; the importance of data centers and the significant impact of Maryland Senate Bill 397-Data Centers Sales Exemption on this industry. He concluded by reporting on an economic development project which they partnered with the Department of Commerce and Frederick County that will jump start a development of data centers. He also presented on a workforce initiative to train transmission engineers.

Mr. Kelly and Mr. Lucas Cade, Senior Economic Development Advisor, FirstEnergy answered questions from the Commissioners.

VIII. Good of the Order

No additional information was shared among the Commissioners.

IX. 2022 Meetings: 8/16/22 – Ocean City Convention Center, 11/15/22 – Annapolis

X. Adjournment

Upon a motion duly made and seconded, the meeting adjourned at 2:16pm.

APPENDIX E



August 16, 2022
Visit Baltimore, 400 E. Pratt Street, 10th Floor, Baltimore
12:00pm-2:00pm
Agenda

Commissioners in attendance:

Margaret Wood, D.A. PMP	Co-Chair, WOOD Consulting Services
Ed Coleman	Co-Chair, Ameren
Kenneth Banks	Banks Contracting Company
Susan Chambers	Strouse
August "Augie" Chiasera	M&T Bank
Jeanette Glose Partlow	Maryland Chemical
Kai Hirabayshi	Amazon – Call in
Julie Lenzer	Advanced Regenerative Manufacturing Institute –Call in
Gwen McCall	F&L Construction and Solid Waste, LLC – Call in
Aris Melissaratos	St. John Properties
Laura Neuman	Entrepreneur
Leon Pinkett III	Baltimore Arts Realty Corporation (BARCO) – Call in
Elizabeth Rendón-Sherman	LG TEK
Gary Ruddell	Total Biz Fulfillment
Eugene Silverman, PhD	Berkeley Springs Instruments

Ex-Officio Members:

Secretary R. Michael Gill	Department of Commerce
Secretary Tiffany Robinson	Department of Labor

Guests:

Mayor Brandon Scott	City of Baltimore
Ted Carter	City of Baltimore
Al Hutchinson	Visit Baltimore
Deborah Ivy	Visit Baltimore
Ari Hamilton-Gery	Visit Baltimore
Anthony Parker	Visit Baltimore
Mia Blom	Visit Baltimore
Craig Vay	Visit Baltimore
Paula Wood	WOOD Consulting Services
Emmalee Strosnider	WOOD Consulting Services
Laura Breidigam	WOOD Consulting Services
Emily Haskel	Maryland Legislative Services – Call in

Commerce Staff:

Julie Woepke	MEDC Executive Director
Signe Pringle	Deputy Secretary
Tom Riford	Assistant Secretary
Liz Fitzsimmons	Managing Director
Kyle McColgan	Chief of Staff
Jennifer LaHatte	Managing Director
Jayson Knott	Senior Director
Michael Siers	Economist
Margaret Whitescarver	Administrative Assistant

I. Call to Order

Co-Chair, Dr. Margaret Wood, called the meeting to order at 12:01 pm and welcomed Commissioners and guests. She thanked Al Hutchinson, President and CEO, Visit Baltimore and his team for hosting the meeting. Dr. Wood then introduced Mayor Brandon Scott, the 52nd Mayor of the City of Baltimore. Bio on file.

II. Welcome

Mayor Brandon Scott welcomed the Commissioners and stated the City is ready to partner to build out the economy and tourism. He stated the importance of the reinvestment process in the city and commented on the success of the Orioles Baseball Team and referenced other important sporting events that draw tourism dollars. He noted that 25% of the Federal American Recovery and Rescue Act (ARRA) funds were directed to housing and economic development. He stated he is working with stakeholders, partners and communities to reimagine Baltimore and transform the city. Mayor Scott referenced a focus on government modernization, reduction on violent crime, and stressed the need to work together to address crime – City, State and Federal governments to bring any change.

Mayor Scott addressed questions from Commissioners on the progress of the goals he set when he took office and measures to produce better outcomes.

III. Visit Baltimore Update

Al Hutchinson, President & CEO, presented an update on the state of Baltimore tourism; new brand review, recap of advertising campaigns; the organization and City's commitment to Diversity Equality and Inclusion, (DEI); and destination analysts research. Overall, he stated that domestic travel to Baltimore is up and overnight trip spending is increasing. However, he state that workforce shortage continues to pose challenge for the industry and addressed steps to address the shortage.

Mr. Hutchinson then discussed the Baltimore Convention Center and stressed that two-thirds of the center is owned by the state and one-third by the city. The Center needs investment into modernization of technology and new customer friendly improvements. He added that sport events drive much of the tourism and is a great marketing activity. He then reviewed the new brand for Baltimore which was developed through research and inclusion of broad range of stakeholders. The new brand was intended to be rolled out in 2020, however, the COVID-19 pandemic pushed back the release. The marketing of the

city will address all neighborhoods. He continued by describing the research tools, ads, DEI training and student engagement. He concluded by reviewing data analytics and marketing funds.

Mr. Hutchinson answered questions and comments from the Commissioners. In response to the top needs to assist the tourism in the City, he stated 1) resources to amplify Baltimore's tourism story beyond a 300 mile radius; 2) fix the Inner Harbor development; and 3) fix the Convention Center. Comments from Commissioners included the discussion of Lexington Market and the need to clean up the area; connect west side to the downtown; more police presence; break up large groups of youth who are intimidating to visitors; and more parking is needed at the convention center. To address safety, he stated Federal gun control was needed.

Deputy Mayor of Economic and Community Development Ted Carter informed the Commissioners that a community group is being formed around Lexington Market to address safety concerns, cleanliness and attractiveness to make the market a success.

Presentation on file.

IV. Department of Commerce Update

Secretary Mike Gill began the Department's presentation by stating he has asked the team to develop the top 20 priorities for the department to finish the year and administration strong. He added that he is preparing for the transition and is noting a number of new opportunities for the next administration. He then provide an update on a number of new programs and an award from the U.S. Economic Development Administration (EDA) for a Goods Jobs Challenge grant. Labor Secretary Tiffany Robinson who Department led the grant application with 16 partners and the Department of Commerce then reviewed aspects of the grant that will transform wind energy workforce. Secretary Gill added that the industry will create \$10 billion impact over the next 10 years.

Deputy Secretary Signe Pringle continued the presentation by updating on the business and expansion opportunities since the last meeting. She reviewed recent wins; existing pipeline; and opportunities, prospective jobs, and capital expenditure by region.

Managing Director of the Office of Tourism and Film, Ms. Liz Fitzsimmons addressed the Commission and provided an update on recent research to guide marketing and product development efforts. She compared the State's marketing resources to other states which is much lower. Maryland's marketing budget is currently \$16.8 million; West Virginia is \$25 million and New York is \$450 million.

She then described the top five (5) tourism attractions/initiatives than few other states possess and described two (2) film productions occurring in the state.

Ms. Fitzsimmons answered questions from the Commissioners.

Presentation on file.

V. Review and approval of May 11, 2022 Meeting Minutes

Upon a motion duly made and seconded, the May 11, 2022 meeting minutes approved.

VI. Rankings & Research Subcommittee

Ms. Elizabeth Rendón-Sherman, Chair, Rankings and Research Subcommittee reported the Subcommittee met last week to review the latest Rankings Report and discuss in particular the latest CNBC Top States for Business rankings. Ms. Rendón-Sherman and Commerce Economist Mike Siers reviewed the

Rankings report and the methodology for the CNBC ranking. No discussion occurred regarding the report.

VII. Good of the Order

No additional information was exchanged by the Commissioners.

VIII. 2022 Meetings: 11/15/22 – Annapolis

IX. Adjournment

Upon a motion duly made and seconded, the meeting adjourned at 1:45pm.

APPENDIX F – DRAFT - To be reviewed at the first 2023 Meeting**



December 13, 2022

Governor's Reception Room, State House, 100 State Circle, Annapolis

12:00pm-2:00pm

Agenda

Commissioners in attendance:

Ed Coleman
Margaret Wood, D.A. PMP
Kenneth Banks
Susan Chambers
August "Augie" Chiasera
Annemarie Dickerson
Jeanette Glose Partlow
Kai Hirabayshi
Manish Kothari
Julie Lenzer
Melissa Noel
Laura Neuman
Leon Pinkett III
Elizabeth Rendón-Sherman
Gary Ruddell
Shawn Salta
Eugene Silverman, PhD

Co-Chair, Ameren
Co-Chair, WOOD Consulting Services
Banks Contracting Company
Strouse
M&T Bank
King Cole Farm – Call in
Maryland Chemical Company
Amazon – Call in
Sheladia Associates, Inc.
Advanced Regenerative Manufacturing Institute
Noel's Fire Protection, LLC – Call in
Entrepreneur
Baltimore Arts Realty Corporation (BARCO)
LG TEK – Call in
Total Biz Fulfillment
DirectMail.com
Berkeley Springs Instruments – Call in

Ex-Officio Members:

Secretary R. Michael Gill
Tom Sadowski

Troy LeMaile-Stovall

Department of Commerce
Maryland Economic Development Corporation (MEDCO) – Call in
Maryland Technology Development Corporation (TEDCO)

Guests:

Allison Mayer
Emily Haskel

Office of the Governor
Maryland Department of Legislative Services

Commerce Staff:

Julie Woepke	MEDC Executive Director
Tom Riford	Assistant Secretary
Kyle McColgan	Chief of Staff
Jennifer LaHatte	Managing Director
Jessica Reynolds	Senior Director
Michael Siers	Economist
Margaret Whitescarver	Digital Marketing Coordinator

I. Call to Order

Co-Chair, Ed Coleman called the meeting to order at 12:00 pm and welcomed Commissioners and guests. He introduced the newest Commissioner, Shawn Salta, President, DirectMail.com. Commissioner Salta was given time to provide his background and interest with the Commission.

II. Consent Agenda

Co-Chair Coleman presented the background and recommendation of item b., the Maryland Economic Development Assistance and Authority Fund (MEDAAF) – Advantage Maryland, industry sector annual review. Commissioner Susan Chambers noted that manufacturing was left off the list in the memorandum and staff indicated it was an error and remains included as a permitted industry sector for funding and would be included in the letter to the MEDAAF Chair. He then offered Mr. Troy LeMaile-Stovall, Executive Director/CEO Technology Development Economic Development Corporation (TEDCO) and Mr. Tom Sadowski, Executive Director, Maryland Economic Development Corporation (MEDCO) to provide brief overview of their FY22 Annual Reports.

Upon a motion duly made and seconded, items a. the August 16, 2022 Meeting Minutes and item b., the Maryland Economic Development Assistance Fund and Authority (MEDAAF) Advantage Maryland – Annual Industry Sector Review were approved and items c. Maryland Agricultural & Resources Based Industry Development Corporation (MARBIDCO) FY22 Annual Report, item d., the Maryland Economic Development Corporation (MEDCO) FY22 Annual Report and Financials, and item d., the Technology Development Economic Development Corporation (TEDCO) FY Annual Report and Financials were accepted.

III. Rankings & Research Subcommittee

Elizabeth Rendón-Sherman, Chair, Rankings and Research Subcommittee requested that Commerce Economist Michael Siers provide an update on the Rankings Report. He stated that overall, the State is doing well. However, it is not always reflected in several national rankings due to the continuous adjustments to indicators by the issuing entity. He indicated that the online dashboard of key indicators has been updated with all of the most recently available data and is available at:

<https://commerce.maryland.gov/commerce/dashboard-of-key-economic-indicators-tracked-by-medc>

Mr. Siers stated that since the last MEDC meeting, Maryland has added 13,600 jobs. However, the State's rankings have fallen a bit. Unemployment rate is 4.5 percent, which is ranked 47th in the country and is down from 39th since August. The State's 3-month growth in total non-farm jobs has also slowed and is ranked 44th. In October, Maryland lost 10,500 jobs and had the 50th ranked growth rate and the worst change in the unemployment rate.

He explained some of this weakness is due to short-term seasonal adjustment issues in the data. But over the past year, Maryland's total jobs growth rate still lags the national average and ranks 42nd. Two (2) interrelated reasons for Maryland's slower recovery are the rise of remote work and child care. He stated

that as the economic recovery continues, paying special attention to struggling industries and workers outside the labor force will help us rebuild and improve our rankings.

Mr. Siers then answered questions from the Commissioners related to labor force participation; percentage of discouraged workers; retired workers rejoining the workforce; income levels data for labor force participation; creative class indicators and marketing; and green energy rankings. Subcommittee Chair Rendón-Sherman, concluded by stating the Subcommittee has been meeting and that the Research Team has been very responsive in gathering data requested of the Subcommittee.

IV. Department of Commerce Update

Secretary Mike Gill began the Commerce presentation by reporting on the successful All Hands First Monday meeting held on Tuesday December 5th with over 150 attendees. He was proud to announce that Governor Hogan, who attended the Department's initial First Monday in 2016 to kick off Open for Business and Change Maryland, attended the meeting on December 6th. The Governor gave heartfelt thanks to the Department for changing Maryland for the better, improving the culture, supporting and retaining businesses, creating opportunities and jobs and improving the State's economy.

Secretary Gill reflected on the last 8 years of the Hogan-Rutherford Administration stating that under the guidance of the Commission developing the initial strategic plan, the State has made significant strides in improving the culture of State government; focusing on customer service; eliminating taxes and regulations detrimental to businesses and residents; and achieving growth from retention. He stated the Commerce Subcabinet was successful in collaborations among State agencies who impact businesses and the Regional Resources Teams are the boots on the ground for collaborations.

He then reviewed the State's economic performance from January 2015-present. He emphasized the need to improve Baltimore for the sake of the entire state and believes that the City could be the best comeback story. He encouraged Commissioners to stay together and continue to make recommendations to improve the State's economy, support businesses and tell the State and Department successful stories.

He then introduced Ms. Julie Woepke, MEDC Executive Director to review the latest business attraction and expansion opportunities on behalf of the Office of the Business and Industry Sector Development. Ms. Woepke reported on the recent wins; existing pipeline; breakdown by region of the number of opportunities, prospective jobs and capital expenditures; and breakdown of the number of opportunities by industry and region.

Secretary Gill then introduced Jessica Reynolds, Senior Director, International Investment and Trade to provide updates to the strategic initiatives; details of the Maryland Global Gateway Program launched in September, 2022; and review the upcoming international events for business development.

All Presentations on file.

V. Infrastructure Subcabinet Update

Ms. Allison Mayer, Deputy Chief of Staff, Office of the Governor was introduced by Co-Chair Coleman. Ms. Mayer serves as the State's Infrastructure Director for the national bipartisan infrastructure law. She is charged with leading the implementation of the Federal funds and provided an overview of the law; priority funding areas; funds to be received by Maryland; membership of the Subcabinet; and current and upcoming funding opportunities.

Ms. Mayer answered questions from the Commissioners including funding formulas and local matching funds requirements.

Presentation on file.

VI. Good of the Order

Co-Chair Coleman on behalf of the Commission thanked Secretary Gill for his leadership of the Department through the Hogan-Rutherford Administration stating he has made a significant positive impact on the State. He then opened the floor to any updates from the Commissioners. No Commissioners had additions.

Assistant Secretary Tom Riford announced the upcoming Military Bowl to be played in Annapolis on December 28th – the only Bowl game to be played that day that will provide significant press coverage for Maryland and described a number of film projects underway in the State.

VII. Adjournment

Upon a motion duly made and seconded, the meeting adjourned at 1:45pm.