

annual report
fiscal year 1998



Maryland

*Department of Business &
Economic Development*





Parris N. Glendening
Governor



Kathleen Kennedy Townsend
Lt. Governor

Maryland is a great place to do business. From bio-tech to manufacturing, from health care to agriculture, the State is on the move. We have the people, the infrastructure, the quality of life and the attitude needed for success. In fact, Maryland's economy is at its strongest point in a decade, with solid job growth, higher wages and a consistently low unemployment rate.

Over the past four years, the Glendening-Townsend Administration has worked to improve Maryland's business climate. Working with the General Assembly, we reduced the State's personal income tax for the first time in thirty years. We implemented a job creation tax credit program and reduced or eliminated more than one dozen business taxes. Responding to the needs of businesses across the State, the Department of Business and Economic Development established five regional centers, providing better access to customer-focused service. Advanced Technology Centers, located in community colleges throughout Maryland, also provide these businesses with customized high-tech training for their employees, ensuring that our State has a skilled workforce to meet the needs of businesses, both today and in the future.

During the next four years, we will continue to strive to further strengthen Maryland's business environment. We will increase our capability to respond to economic development opportunities, improve access to capital and financing and streamline the approval process for existing incentive programs. Moreover, through workforce development programs, we will ensure that Maryland companies have access to the trained and qualified people they need to grow and expand.

Making Maryland's economy a national benchmark has always been, and will always be, a top priority of this administration. As you read this annual report, we think you will agree that we have made substantial progress toward our goal.

A handwritten signature in cursive script that reads "Parris N. Glendening". The signature is written in dark ink and has a long, sweeping tail.

A handwritten signature in cursive script that reads "Kathleen Kennedy Townsend". The signature is written in dark ink and is more compact than the one above.



Richard C. Mike Lewin
Secretary

This has been a remarkable year for Maryland and the Department of Business and Economic Development. The Maryland economy is strong and we have seen tremendous growth in the number of new and expanding businesses and the number of new and retained jobs across the State. In fact, the U.S. Department of Commerce's Bureau of Economic Analysis recently ranked Maryland 16th in the nation for job growth.

Our proactive approach to doing business in Maryland and our success in creating a business friendly environment have resulted in a tremendous number of new businesses and new jobs coming to the State. In fact, a recent Dun and Bradstreet report ranks Maryland fifth in the nation for new business starts. During fiscal year 1998, the Department worked to create more than 21,000 new jobs and retain 26,000 current jobs in the State.

This Department is proud to have been a part of another successful year for our State. Our mission is simple but important: to stimulate private investment and jobs, attract new businesses to Maryland, encourage the expansion and retention of existing companies and provide businesses with workforce training and financial assistance.

Governor Glendening and Lt. Governor Townsend have identified economic development as a top priority of their administration. It is a vital ingredient in keeping Maryland as one of the most dynamic and exciting places to live, work and do business in the world. We hope this annual report will offer a look at the department, its people and its mission in taking Maryland into the next Millennium.

Richard C. Lewin

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*Department of
Business and
Economic
Development*

The mission of the Maryland Department of Business and Economic Development (DBED) is to stimulate private investment and create jobs, attract new businesses to the State, encourage the expansion and retention of existing companies, and provide businesses in Maryland with workforce training and financial assistance. The Department also publicizes Maryland's economic advantages and markets local products and services at home and abroad to spur economic development, international trade and tourism. As part of its promotional mission, the Department also supports the arts, film production, sports and other special events. The four primary divisions are Marketing, Financing, Regional Development and Tourism, Film and the Arts. The Division of Administration provides administrative and support services.

Vision

Maryland possesses a superior economic climate for business growth. The State's economic development activities focus on expanding the number of Maryland businesses and on the growth and increased competitiveness of existing businesses, large and small, in every region. Collaborative, proactive partnerships among government, business, and academic leaders continue to be an integral facet of the State's economic development efforts. Maryland continues to be recognized as a premier location to live, work and visit.

Goals

- Continue to create and foster a more favorable business climate
- Assure that all regions share in the economic vitality of the State of Maryland
- Develop an economic/industrial base that maximizes the potential of each economic cycle.

Objectives

- Increase new jobs annually
- Maintain and enhance the existing employment base
- Advocate for more responsive tax and regulatory policies
- Increase the per capita income annually
- The State unemployment rate will remain at least one percentage point below the national average

M E A S U R E M E N T

	FY 1997 ACTUAL	FY 1998 ACTUAL
EMPLOYMENT		
New Jobs	16,957	21,078
Retained Jobs	14,785	26,367
TOTAL	31,742	47,445
CAPITAL INVESTMENT		
State: In State Companies	\$88.5 million	\$132.8 million
State: Out-of-State Companies	\$10.2 million	\$14.7 million
TOTAL	\$98.7 million	\$147.5 million
PRIVATE SECTOR	\$1.06 billion	\$1.58 billion

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Richard C. Mike Lewin

THE COMMISSION

The Commission continues to work with Governor Glendening on issues and actions that will make Maryland more business friendly and create, retain, and attract jobs and investment in the State.

The Maryland Economic Development Commission was created by Governor Glendening in 1995 to foster a positive business climate that will result in more employment opportunities for Maryland citizens. This partnership between the private sector and state government is engaged in strategic planning, marketing initiatives and program and policy development that enables the State to compete more vigorously in the global marketplace.

To accomplish its goal of increasing Maryland's competitiveness, the Commission has produced two strategic plans, *Strategic Directions for Increasing Maryland's Competitiveness* and *Strategic Directions for Increasing the Competitiveness of Maryland's Growth Industry Sectors*. The Commission continues to work with Governor Glendening on issues and actions that will make Maryland more business friendly and create, retain, and attract jobs and investment in the State.

F Y 9 8 H I G H L I G H T S

- Publicized and evaluated the performance and effectiveness of the State's economic development policies and programs.
- Testified before the General Assembly on legislation concerning the personal income tax reduction, workforce skills development, regulatory reform and increasing the State's capital resources for companies.
- Supported the development, execution and evaluation of marketing materials and projects targeted at the State's growth industry sectors.
- Solicited private sector involvement, contributions and funds for economic development activities, especially for the International Research Development Council IDRC Conference held in Baltimore in May 1998.
- Through its Maryland Marketing Partners program, communicated the State's economic strengths and opportunities in publications and during personal meetings with business and community leaders.
- The Commission's mission is to establish economic development policy, incentives and programs that help create a future in Maryland in which economic prosperity is open to all of its citizens in all geographic areas.

*Economic
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Richard C. Mike Lewin

Office of the Secretary

The Office of the Secretary directs, supervises and coordinates the activities of the Department and maintains working relationships with local, state and federal agencies, county and municipal governments, businesses and organizations. Included in the program are the Deputy Secretary, Executive Director of the Maryland Economic Development Commission and the offices of the Attorney General, Communications, Legislative Liaison and State Technology Coordinator.

Office of the Attorney General

The Office of the Attorney General provides legal counsel and advice to the Secretary in negotiations, administrative proceedings and litigation, and assists department staff in drafting documentation for financial assistance, legislation and regulations.

Office of Communications

The Office of Communications develops, coordinates and implements a comprehensive public relations program for the Department and its programs. Activities include proactive media relations, preparation of news releases, publications, speeches and coordination of special events.

Office of Legislative Liaison

The Office of Legislative Liaison assists in the development of the Department's legislative agenda, assembles and prepares information for bill hearings, acts as liaison between the Department and members of the Maryland General Assembly and advises the Secretary on State legislative and governmental relations.

The State Technology Coordinator

The State Technology Coordinator, working with universities, federal labs, technology councils and non-profit research organizations, helps to expand the growth and competitiveness of technology-based companies in Maryland. The Coordinator promotes policies and identifies opportunities to assist Maryland's technology industry, works to enhance the value of DBED programs that provide assistance and funding to technology based companies, and serves as DBED's liaison to the technology community.

DIVISION OF MARKETING

Division increases awareness of the State's business advantages among key corporate decision-makers and site-selection consultants and provides site selection assistance to domestic and international businesses.

The goal of the Division of Marketing is to attract new businesses to Maryland and support the expansion of existing businesses in the State. To accomplish this, the Division increases awareness of the State's business advantages among key corporate decision-makers and site selection consultants, provides site selection assistance to domestic and international businesses and assists businesses increase their exports in the world market. The Division also provides demographic, economic, and market data to help companies expand their markets. Three primary units carry out these responsibilities: the Office of Business Development, the Office of International Business and the Office of Business and Economic Research.

During Fiscal Year 1998, the Division of Marketing worked on 114 business projects that will generate \$2.8 billion in new capital investment.

The Office of Business Development

The Office of Business Development actively cultivates relationships with strategic players in the economic development arena. Recent events sponsored by DBED have helped develop relationships with the National Association of Corporate Real Estate Executives (NACORE), the International Research Development Council (IDRC), the National Association of Industrial and Office Properties (NAIOP), the Biotechnology Industry Organization (BIO) and the Institute of Food Technology & Food Expo, etc.

The Office of Business Development's National Marketing Unit

The Office of Business Development's National Marketing Unit delivers consistent, positive messages about the State in trade and general business magazines, radio and cable TV ads, airport displays and billboards, industry exhibits and at trade shows. This communication strategy generates leads from potential employers interested in locating to Maryland, which are then tracked and managed by the Marketing Unit.

The Business Location Group

The Business Location group provides hands-on site selection assistance to companies contemplating expansion opportunities within Maryland. It provides comprehensive information about the State and its jurisdictions and identifies available sites that meet a company's requirements. Representatives from the group provide customized presentations and identify state incentive programs

(worker training and financing options) that would benefit expanding firms.

The Office of International Business

The Office of International Business has a two-fold mission: The Trade Development and Promotion Groups are committed to increasing the participation of Maryland firms in the world market; the Foreign Investment Group aims to raise the profile of Maryland as a business location for foreign owned firms.

The Office offers export assistance to small and medium-sized Maryland firms with internationally competitive products and services. Trade specialists provide export transaction counseling, conduct market research and assist clients with trade shows and missions in target markets and industries. A network of foreign offices and representatives in nine countries in strategic markets around the globe assist in this effort.

Foreign Investment Representatives market Maryland as the premier location for companies headquartered abroad, and assist foreign firms already in Maryland with their expansion plans. The Group offers site selection assistance and expertise on advantages to international firms, similar to the work of the representatives in the Office of Business Development.

The Office of Business and Economic Research

The Office of Business and Economic Research provides objective, timely and market-driven analyses and customer support to marketing representatives throughout the Division and the Department. It offers in-depth reports on issues affecting Maryland's business and commerce, including public sector tax and expenditures, regulatory issues and legislation affecting the economy. Administration of the State's Enterprise Zone Program and the certification process for job creation tax credits is managed through this office as well. Products such as the Resource Allocation Model (RAM) and publications such as *The Economic Pulse*, *Brief Economic Facts* and *Maryland: The Right Location for Your Business* support marketing efforts of DBED.

Governor Glendening

led a business

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\$3 million

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FY 98 HIGHLIGHTS

OFFICE OF BUSINESS DEVELOPMENT

Advertising leads generated during FY 98 totaled 421. Chief lead-producing business development magazines: Business Facilities, Expansion Management, Global Sites & Logistics, and World Trade magazines.

- Worked with 114 projects in siting or expanding facilities that will generate \$2.8 billion in new capital investment.
- Attended 12 trade shows and exhibitions from July 1, 1997 through June 30, 1998. Prospect leads from these events and carryover from prior exhibits totaled 302 for the year. Trade show presence at targeted industry exhibits included the following: biotechnology (4), food processing (2), information technologies (4), electronics (1) and manufacturing (1).
- Established and promoted on-going relationships at conferences attracting development/site selection leaders (NACORE and IDRC).
- Produced and coordinated advertising in 25 publications (46 insertions) targeting business development, trade, minority business and regional media outlets. Advertising leads generated during FY 98 (including carryovers from prior year) totaled 421. Continued communication through chief lead-producing business development magazines: *Business Facilities, Expansion Management, Global Sites & Logistics, and World Trade* magazines.
- Extended Maryland's reach into new areas through targeted geographic marketing (*Crain's NY Business*) and varied media selection (*UPSIDE Magazine*).
- Used trade publications such as *Canadian Plastics, Food Executive, Nature, Biotechnology* and *World Trade* to reach decision makers in targeted industries.
- Teamed with local economic developers and regional allies for selected ad insertions (Patuxent Partnership/BWI Aviation Week and Upper Eastern Shore Partnership/Chesapeake Publishing.)
- Reached resident Maryland companies through selected insertions in regional media such as *Baltimore Business Journal, The Daily Record* and *Tech Gazette*.
- Assisted *Baltimore* magazine with information on the State, its regions and economy for a "Maryland Made Easy" issue; purchased issues for collateral use with business prospects.
- Provided service across a spectrum of business activity, from new sectors of biotechnology (e.g., Genetic Therapy, Inc.) to established and retooled manufacturing sectors (e.g., Beth Ship, Bethlehem Steel Corp., etc.)

OFFICE OF INTERNATIONAL BUSINESS

- The Office of International Business assisted 238 companies and 104 validated export sales totaling \$22 million.
- Slightly more than \$6 million in trade finance insurance through the Maryland Industrial Development Finance Authority generated \$61 million in exports and \$6.6 million in imports.
- During the fiscal year, 19 foreign firms announced or established new facilities in Maryland. This direct investment will represent \$51.8 million in capital investment.
- Governor Glendening led a business mission to Israel resulting in a \$3 million trade transaction and agreements between Israeli institutions, UMBC and UMCP.
- Lt. Governor Townsend led a business mission to Japan resulting

in \$500,000 in corporate sponsored research for UMAB, one active investment expansion project, two long-term prospects and two short-term prospects.

- Maryland Trade Assistance Program (MTAP) offsets company costs to participate in the global marketplace through matching grants. In FY98, over \$100,000 in program funding leveraged more than \$300,000 in contributions made by 52 exporters.
- Activated a network of foreign representative offices in Brazil, Argentina, Chile, China, Japan, the Netherlands, Mexico, Israel and South Africa.
- Produced and distributed WORLDVIEW, a bi-monthly newsletter to over 5,000 international business executives.

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capital investment.*

OFFICE OF BUSINESS AND ECONOMIC RESEARCH

- Provided prospect support through, 48 Dunn & Bradstreet report runs, 118 Resource Allocation Model runs, 28 Enterprise zone runs and 60 Job Creation Tax Credit runs.
- Other prospect support included new publications such as *Mary-*

land The Right Location for Your Business, Maryland Incentives, and the 1998 edition of Brief Economic Facts for the State and 24 localities.

- Processed and certified 43 JCTC requests.

Published

The

Economic Pulse,

a new internal publication offering a synopsis of the State's economy, including key indicator data, on a monthly and quarterly basis.

- Installed two local Resource Allocation Models and provided training on the system to 30 individuals.
- Completed three economic impact studies.
- Approved three Enterprise Zone expansions and designated two new zones.
- Published *The Economic Pulse*, a new internal publication offering a synopsis of the State's economy, including key indicator data, on a monthly and quarterly basis.
- Participated in five collateral-generating partnerships including IDRC research/reports.
- Conducted ACCRA Cost of Living Surveys, *Maryland Statistical Abstract*, *Maryland Manufacturers Directory* and the *Baltimore* magazine special issue project.
- Received awards from the American Economic Development Council, International Development Research Council and the National Association of State Development Agencies for marketing/research products.



Financing Programs are used to accomplish strategic goals and allocate resources based on such factors as job retention, new jobs created; amount of capital investment; the industry sector; and the type of jobs and level of wages.

In accordance with the Department's charge to stimulate private investment and create jobs, the Financing Division provides strategic assistance to businesses through a variety of programs, which include direct lending, bank loan guarantees, equity investments, bond financing, day care financing, linked deposits, insurance guarantees and venture capital investments. The primary objectives of the Financing Division are to underwrite credit risks; negotiate, structure and close loans and incentives; and manage the accounts after closing. These programs are used to accomplish strategic goals and allocate resources based on such factors as job retention, particularly for high risk areas; new jobs created; amount of capital investment; county/local unemployment level; the industry sector; and the type of jobs and level of wages. The Division's programs are broken into four types: incentive, specialty, traditional and investment financing.

The Department's customers are businesses throughout the State, businesses looking to locate in the State, the economic development offices located in 24 jurisdictions consisting of the counties, Baltimore City, local economic development representatives and the financial community dealing with Maryland based businesses.

Incentive Programs

Maryland Industrial Land Act

The Maryland Industrial Land Act (MILA) program was formed to support local economic development by providing for low-interest, long-term financing to local jurisdictions. It is a revolving loan fund that may be used for the acquisition of land, development of industrial parks, the construction, acquisition or finishing of buildings and infrastructure needed to serve the sites.

Maryland Industrial and Commercial Redevelopment Fund

Maryland Industrial and Commercial Redevelopment Fund (MICRF) was created to support local economic development by providing for low-interest, long-term financing for high-priority economic development projects. It is a revolving loan fund that may be used for the acquisition of land and construction or acquisition of buildings and fixed assets.

The MILA and MICRF programs were expanded as of October 1, 1997 to allow businesses to be the direct borrowers with support from the local jurisdiction.

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**Economic Development Opportunities Program Fund
(Sunny Day Fund)**

The Economic Development Opportunities Program Fund was created to enable Maryland to act on extraordinary economic development proposals that require financial assistance beyond the capabilities of existing state and local financing programs. The Sunny Day Fund provides funding to assist in the retention and expansion of existing businesses and/or the establishment or attraction of new businesses.

Community Development Block Grant Economic Development Program

Community Development Block Grant Economic Development Program (CDBG-ED) was initially managed by the U.S. Department of Housing and Urban Development as a community development resource that provided funding for housing rehabilitation and neighborhood revitalization. In 1987, with decentralization of the program, Maryland established its own program, which is administered jointly by the departments of Business and Economic Development and Housing and Community Development. Community Development Block Grant Economic Development funds provided by DBED are used for loans to businesses and/or conditional grants to eligible local governments in support of economic development projects that provide direct job creation.

F Y 9 8 H I G H L I G H T S

- MILA recorded activity in 11 different projects. Five of these were new projects that were approved by the Department for a total of \$6,095,000. The MILA program has outstanding loans totaling \$51,031,154 made to 77 businesses.
- Under the MICRF program, a total of 13 projects were approved for an aggregate of \$5,400,000. The MICRF program has \$40,741,789 loaned to 66 businesses.
- Twenty-four Sunny Day projects totaling \$19,290,339 were closed or funded.*
- As of June 30, 1998, the CDBG-ED allocation for FY 98 in the amount of \$3,352,750 had been fully committed to two economic development projects. The CDBG portfolio currently totals \$13,189,004, with loans extended to 25 businesses.

**During the Legislative Policy Committee meeting convened in March 1997 and meetings in June 1997 and December 1997, 31 financial incentives (representing 25 different projects) were approved for \$32,480,000 in funding. The encumbrance of these approvals depleted the FY 1998 Sunny Day Fund appropriation, necessitating a \$5.3 million deficiency appropriation.*

Specialty Programs

Maryland Small Business Development Financing Authority

The Maryland Small Business Development Financing Authority (MSBDF) provides loans and loan guarantees to businesses owned by socially or economically disadvantaged persons through its Contract Financing, Guaranty, Surety Bond and Equity Participation Investment Programs.

The Contract Financing Program provides working capital loans to disadvantaged businesses that were awarded contracts with local, state and federal government agencies. The Long Term Guaranty Program provides partial guarantees for long-term working capital and equipment loans to disadvantaged businesses by banks and other commercial lending institutions.

The Surety Bond Program helps small businesses obtain bid, performance, or payment bonds necessary to perform on contracts where the majority of funds are also provided by a government agency or public utility. The Equity Participation Investment Program provides funding for franchise business acquisition and technology based businesses.

These programs are generally the first level of debt assistance obtained by small firms that do not qualify for bank financing because they are in the early phase of operations. They also do not have a track record of performance, lack adequate collateral to secure a loan, or otherwise do not meet the banking industry's credit criteria for commercial loans.

F Y 9 8 H I G H L I G H T S

- The Contract Financing Program provided funding to three new businesses and increased lines to five new businesses. The program provided support to ten businesses with lines totaling \$1,637,000 and the outstanding loan balances totaled \$296,866.
- The Long Term Guaranty Program closed three new deals with \$480,797 in total maximum exposure. The program supports 12 businesses and has \$1,865,203 of maximum insurance exposure and has \$1,593,026 in direct exposure.
- The Surety Bond Program provided assistance to three new businesses. The program supports four businesses with \$2,100,000 of total exposure and \$595,145 in direct exposure.

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The Day Care program supports 60 businesses with \$4,511,645 of insurance on loans and \$3,837,889 in direct loans.

- The Equity Participation Program supports nine active businesses and has \$976,860 outstanding. The two new deals approved

during the year had not been funded at year's end and represents \$550,000 in unfunded transactions.

The Day Care Facilities Loan Guarantee Fund, the Child Care Facilities Direct Loan Fund and the Child Care Special Loan Fund

The Day Care Facilities Loan Guarantee Fund, the Child Care Facilities Direct Loan and the Child Care Special Loan Fund provide guaranties and loans to assist the development and expansion of day care facilities for infants, toddlers, pre-school children, before and after-school programs, the elderly and handicapped adults. The programs may be used for: land and building acquisition, construction, renovations, supplies, business acquisition, equipment and working capital. The Child Care Special Loan Fund, which receives its funding through the Federal Child Care and Development Block Grant, provides funding for minor upgrades to facilities, purchase of inventory, equipment, educational materials, furniture and other items as required by federal regulations.

F Y 9 8 H I G H L I G H T S

- In FY 98 two loans were closed with \$208,000 in insurance and six direct loans were closed totaling \$42,000. The Day

Care program supports 60 businesses with \$4,511,645 of insurance on loans and \$3,837,889 in direct loans.

The Maryland Seafood and Aquaculture

The Maryland Seafood and Aquaculture program was established to provide below-market, fixed-rate loans to eligible individuals or businesses for the expansion, innovation and modernization of the Maryland aquaculture industry.

F Y 9 8 H I G H L I G H T S

- One loan was funded in the amount of \$250,000. The fund

has loans to seven businesses totaling \$1,150,811.

Traditional Programs

The Maryland Industrial Development Financing Authority

The Maryland Industrial Development Financing Authority provides insurance support for loans by financial institutions to manufacturing, industrial and technology businesses located in or moving to Maryland. The overall goal is to promote private-sector financing of economic development by providing insurance to transactions, thus reducing credit risks, enabling longer terms, and encouraging lower interest rates to facilitate the viability of small and mid-sized companies. Responding to this mission, the main programs have evolved to the present Bond Insurance Fund and the Authorized Purpose Insurance Fund.

The Bond Insurance Fund participates with private sector financial institutions, counties, municipalities, industrial development authorities and other public bodies in the issuance and/or insurance of taxable and tax-exempt economic revenue bonds for fixed assets and working capital. The Authorized Purpose Insurance Fund insures transactions made by conventional and asset-based financial institutions for working capital, fixed assets, letters of credit, leasing, and other related activities.

F Y 9 8 H I G H L I G H T S

- MIDFA participated in 13 transactions providing \$82,868,000 in financing with insurance totaling \$18,607,000 .
 - Presently, there are nine approved transactions pending settlement in the amount of
- | | |
|---|--|
| \$42,925,000, insured for \$10,112,000. | • The MIDFA program supports 103 transactions with total insurance of \$96,359,755 in force. |
|---|--|

Investment Financing Group Programs

The Challenge Investment Program and Enterprise Investment Fund

The Investment Financing Group is responsible for the management of three venture capital equity investment programs. The Challenge Investment Program and Enterprise Investment Fund provide funding for technology-driven companies, either as start-up or second stage funding. The Maryland Venture Capital Trust invests in eight separate

The overall goal (MIDFA) is to promote private-sector financing of economic development by providing insurance to transactions thus reducing credit risks, enabling longer terms, and encouraging lower interest rates to facilitate the viability of small and mid-sized companies.

The Challenge and Enterprise programs provide support to 84 businesses. These investments have the ability to generate extraordinary gains and, based on initial investments of \$10,000,000, has a current market value in excess of \$37,000,000.

private-sector venture-capital limited partnerships, all of which are committed to reinvesting the funds in Maryland-based, primarily technology-oriented firms.

F Y 9 8 H I G H L I G H T S

- Challenge closed 11 investments totaling \$550,000 and five milestone investments totaling another \$125,000.
- Enterprise closed seven transactions totaling \$1,750,000.
- The Challenge and Enterprise programs provide support to 84 businesses. These investments

have the ability to generate extraordinary gains and, based on initial investments of \$10,000,000, has a current market value in excess of \$37,000,000.



Companies participating in programs sponsored by the Division of Regional Development exceed national averages in gross sales, productivity and employment.

The Division of Regional Development (DRD) has been successful in helping Maryland companies compete, grow and profit in the global marketplace. The Division supports the Department's mission to encourage expansion and retention of existing companies by implementing business-focused strategies to improve their performance. This is achieved by providing direct services to business customers and by supporting economic development projects throughout the State. Companies participating in programs sponsored by the Division exceed national averages in gross sales, productivity and employment.

The Division includes three primary program units: the Office of Regional Response, the Office of Community Infrastructure Development (formerly the Office of Federal Response and Technology Commercialization) and the Office of Business Advocacy. The Division also includes the Office of Technology Support and the Office of Program Policy and Evaluation.

The Office of Regional Response

The Office of Regional Response (ORR) helps manufacturing and technology companies achieve greater growth and competitiveness by providing a seamless array of business services that enhance the economies of the State's diverse regions. Five regional offices located in Baltimore, Cumberland, Rockville, LaPlata and Salisbury provide case management, ombudsman liaison, technical assistance and information and referral services to businesses throughout the State. ORR, through linkages with federal, state and local government resources and the private sector, provides business assistance including: strategic planning and marketing, manufacturing modernization, technology commercialization, workforce development, financing and consortia programs for world-class manufacturing, ISO 9000 and software engineering.

The Office of Community Infrastructure Development

The Office of Community Infrastructure Development (OCID) consults with local governments on long-term economic development projects to stimulate revitalization throughout the State. In FY 1998, the program helped to increase the economic viability of military base reuse areas and government surplus properties; reviewed local comprehensive development plans; developed strategic plans for at-risk areas; and structured financing packages for 13 Maryland companies participating in the Maryland Economic Adjustment Fund.

*Seven hundred
fifty-two companies
received assistance
through the
Statewide and
Regional Office
Business Assistance
and Referral
Services.*

The Office of Business Advocacy

The Office of Business Advocacy (OBA) assists businesses in navigating through the regulatory processes of local, state and federal government. OBA acts as a liaison between its clients and any public regulatory body. The Office cooperates with the Division's Regulatory Policy Coordinator to streamline the regulatory environment. These services collectively create a more business-friendly environment in Maryland. In FY 1998, the Office provided personalized attention to 208 business clients to ensure that their permitting and regulatory needs were met promptly. Of these, 58 percent were Maryland for-profit companies, 37 percent were Maryland small business start-ups, 4 percent were out-of-state prospects, 1 percent were non-profit companies or organizations and 1 percent were public agencies.

The Office of Technology Support

The Office of Technology Support identifies resources available to Maryland technology industries to promote economic growth and increase competitiveness. The Office helps technology companies find new markets; assists in the commercialization of technologies being developed in corporate, university, and federal laboratories; and helps develop and implement strategies for regional economic diversification.

The Office of Program Policy and Evaluation

The Office of Program Policy and Evaluation works with the education community to coordinate, enhance, design and implement inter-agency policy initiatives pertaining to business assistance, workforce development and customized workforce training services. Partners include the Maryland State Department of Education; the Maryland Higher Education Commission; the Maryland Department of Labor, Licensing and Regulation; the Maryland Department of Human Resources; State universities; and Maryland's community colleges. The Office provides statistical reporting on the Division's programs.

F Y 9 8 H I G H L I G H T S

In Fiscal Year 1998, the Division assisted 752 businesses. The top requests for assistance received from companies by the Division were workforce development, regulatory information, and facilities modernization. Thirty-eight percent of the Division's services addressed workforce development needs, 32 percent provided regulatory assistance, 15 percent addressed technology commercialization and 15

percent addressed technical assistance needs. Additional support provided to businesses included management consulting, strategic planning, strategic marketing and financing assistance.

FY 98 HIGHLIGHTS

- Seven hundred fifty-two companies received assistance through the Statewide and Regional Office Business Assistance and Referral Services.
- Two hundred seventy eight companies were assisted through the DRD Workforce Development Programs: Partnership for Workforce Quality, ISO, World Class Consortium and the Maryland Industrial Training Program.
- In cooperation with the Greater Baltimore Committee Technology Council and the High Technology Council of Maryland, conducted a survey of 676 Maryland technology companies. The study found that the chief concern of these technology businesses was finding qualified skilled and technical workers.
- More than 450 Maryland businesses received help marketing their products through the Maryland with Pride program.
- In partnership with the Maryland Higher Education Commission (MHEC), launched the Maryland Applied Information Technology Initiative (MAITI) which will double the number of information technology enrollments and graduates from seven leading Maryland universities and colleges by 2004.
- In partnership with MHEC, continued implementation and operation of the Advanced Technology Centers initiative at 18 community colleges that provided customized training to more than 275 business customers.
- Developed a policy initiative and report resulting in the passage of House Bill 5 which makes Biotechnology and Information Technology companies eligible for the Manufacturing Tax Exemption.
- In cooperation with Maryland Industrial Development Association (MIDAS), conducted a study to evaluate the performance of incubators and developed recommendations for a successful Maryland effort.
- Provided \$1.5 million in assistance through the DRD administered Maryland Economic Adjustment Fund (MEAF) to six businesses to assist in their transition from government contracting to the commercial sector.
- The Division spent \$2,948,674 on building economic development capacity and improving the State's business climate. These initiatives included partnering and funding for 35 training, education, policy and physical infrastructure projects on behalf of businesses and communities.
- The Maryland World Class Manufacturing Consortium (WCMC) was launched this past

*The Maryland
World Class
Manufacturing
Consortium was
launched this past
fiscal year, bringing
35 companies
together to design
and implement
programs to take
member companies
to world class
status in their
industries.*

DIVISION OF REGIONAL DEVELOPMENT

*The Office of
Community
Infrastructure
Development
supported Smart
Growth, which
encourages
economic growth
that takes advantage
of existing
infrastructure
and limits
urban sprawl.*

fiscal year, bringing 35 companies together to design and implement programs to take member companies to world class status in their industries. The Division also began development of the Maryland Software Industry Consortium (SWIC) supporting excellence and continuous improvement of Maryland's information technology industry. These two new and unique public-private partnerships, WCMC and SWIC, focus on training initiatives

and allow companies to gauge their own progress against the performance benchmarks of companies operating at world class levels.

- BLIS, the Business License and Information System, an Internet-based service, was designed to revolutionize how regulatory information and requirements are provided employers, offering easy access to State licensing and permitting information.

OFFICE OF REGIONAL RESPONSE

- Partnership for Workforce Quality (PWQ), a program that provides reimbursement grants and support services to small and mid-size manufacturing and technology companies for workforce training, served 88 businesses through individual company grant projects.
- As a Partnership initiative, the ISO Consortium Program, which provides a program of guided development and implementation of quality systems that conform to the International Organization for

Standardization, served 107 businesses.

- The Maryland World Class Manufacturing Consortia, also a PWQ initiative, served 35 businesses seeking world class resources, productivity, quality and price.
- The Maryland Industrial Training Program provided workforce training grants to 48 companies locating to or expanding within the State.

OFFICE OF COMMUNITY INFRASTRUCTURE DEVELOPMENT

Provided funding or technical assistance to:

- Conduct a study on the performance of business incubators in Maryland.
- Assist in developing new businesses for the creation of jobs in Anne Arundel County.
- Develop challenge grants for and expand financing assistance to minority businesses.

- Expand activities at the Patuxent Naval Air Station in Southern Maryland and for job development and the reutilization of the closed White Oak base in Montgomery County and Fort Ritchie in Washington County.
- Support the Eastern Shore's Gateway Center/NASA RAC project in the use of GPS technology to develop precision farming

capabilities for increasing output and decreasing costs.

- Develop strategic economic development plans for Allegany and Garrett counties.
- Support Smart Growth, which encourages economic growth that takes advantage of existing

infrastructure and limits urban sprawl.

- Support the Patuxent River Partnership in the growth of technology companies in Southern Maryland.

OFFICE OF BUSINESS ADVOCACY

- Worked with the Mid-Atlantic Petroleum Distributors Association to broaden the definition of burner service mechanics.
- Actively engaged in the Maryland Rail Marketing Project, a state-wide initiative with the Maryland Department of Transportation, that increased communications between government and the rail industry and began the process of cataloging all land parcels contiguous to railways.
- Staffed the Taskforce on Manufacturing Law and High Tech Businesses to enable Maryland high tech companies to receive the same personal property tax exemptions as manufacturers.

- Collaborated with Cecil County to create an infrastructure improvement plan for a more attractive environment for business development.
- Staffed the State's Emissions Banking and Trade Task Force, which enabled Maryland to meet air quality standards with a balanced approach to economic development and the environment.
- Staffed the State's Attainment Task Force that enabled Maryland to meet air quality standards with a balanced approach to economic development and the environment.

OFFICE OF TECHNOLOGY SUPPORT

- Provided funding to the Greater Baltimore Committee Technology Council and the High Technology Council of Maryland to increase the number of technology based jobs and companies.
- Provided Strategic Assistance Fund grants to help companies in transition through diversification.

- Provided Maryland Industrial Partnerships funding through the University of Maryland Engineering Resource Center for cooperative programs connecting university research facilities with companies to expand the commercialization of technologies.
- Provided funding to the Greater Baltimore Committee to conduct a survey of Maryland technology companies.

*Two hundred and
seventy eight
companies were*

assisted

through the

DRD Workforce

Development

Programs:

Partnership for

Workforce Quality,

ISO, World Class

Consortium and the

Maryland Industrial

Training Program.

Companies participating in programs sponsored by the Division exceed national averages in gross sales, productivity and employment.

OFFICE OF PROGRAM POLICY AND EVALUATION

- Provided management oversight for Advanced Technology Centers, in collaboration with the Maryland Higher Education Commission, to increase customized training offered to businesses through Maryland community colleges.
- Funded the installation of an automated client management system in all 18 Maryland community colleges to support Advanced Technology Centers.
- Provided staff support for the Maryland Applied Information Technology Initiative (MAITI) to significantly increase the number of information technology graduates and enrollees at designated universities throughout Maryland over the next five years.



*Maryland
welcomed
more than
27 million
visitors.*

The Division of Tourism, Film and the Arts promotes Maryland as a great state in which to tour and travel as well as to hold meetings and conventions. It also promotes Maryland as an ideal venue for the production of feature films, television programs, videos and commercials. Maryland's arts institutions and artist community are strengthened through careful investment of public funds and through other programs designed to make art in Maryland more accessible to the public at large. Particular emphasis is placed on rural and minority populations, as well as on students in the State's primary and secondary education system. All of these activities result in the overall promotion of Maryland as a desirable state in which to live and do business.

The Division includes three main sections: the Maryland Office of Tourism Development, the Maryland Film Office and the Maryland State Arts Council. Fiscal year 1998 was a highly successful year for the Division.

Growth in tourist visitation and spending demonstrates the success of a concerted marketing and advertising strategy with expansion of television and print advertising using the theme, "So much to do. So close together." New initiatives undertaken this past year by the Office of Tourism Development were aimed at giving visitors greater reason to stay longer and spend more. Maryland also reestablished itself throughout the world as a premier sailing venue by hosting one of the most prestigious international sporting events, the Whitbread Round-the-World Race. In conjunction with Governor Glendening's office, the Division coordinated all state involvement with this very successful, high-profile project.

Maryland's reputation in the film industry as a great location for production work enjoyed a significant boost. More filming was completed in Maryland in the past fiscal year than any other year in the state's history. Film production took place in a wide variety of locations across the state and not just in its metropolitan centers.

This past year, Maryland continued its distinction as one of the top states for public support of the arts. On a per capita basis, Maryland ranks 10th among all states in public investment in the arts. A total of 400 arts organizations and 96 individual artists received state support this year. All 24 local arts councils received funding as well, resulting in even greater arts programming throughout the

Maryland's reputation in the film industry as a great location for production work enjoyed a significant boost. More filming was completed in Maryland in the past fiscal year than any other year in the State's history.

State. Additionally, the Arts Council sponsored special programs in 700 Maryland schools reaching more than 160,000 students.

F Y 9 8 H I G H L I G H T S

O F F I C E O F T O U R I S M D E V E L O P M E N T

- Maryland welcomed more than 27 million visitors.
- Serviced and fulfilled 301,867 general and advertising-generated inquiries (210,000), a 31 percent increase over the previous year. The cost per lead dropped approximately 120 percent, down to \$6.31.
- Television advertising ran nationally over cable networks including CNN, Headline News, the Weather Channel, ESPN, Home Team Sports, Nick at Night, Black Entertainment Television, the Travel Channel, Lifetime and the History Channel.
- Print advertising ran in *Southern Living*, *American Heritage*, *Coastal Living*, *National Geographic Traveler*, and *Better Homes and Gardens*.
- Generated more than \$12.8 million in travel press coverage of Maryland, an 8 percent increase over the previous year. Much of this coverage is the result of Maryland's ongoing program of familiarization tours for travel writers, of which there were 39 this year reaching more than 60 media outlets.
- For the second year in a row, Maryland was named the "Most Media-Friendly State" by the North American Travel Journalists Association.
- Coordinated all advertising for the 135th Anniversary Reenactment of the Battle of Antietam, helping to attract a record-breaking crowd of more than 150,000.
- Coordinated all advertising for the Baltimore/Annapolis stopover of the 1997-1998 Whitbread Round-the-World Race, resulting in the largest one-day crowd in Baltimore's Inner Harbor history and universal acclaim by the race organizers and racing syndicates that it was one the best stopovers in Whitbread history.
- Through its international tourism marketing arm, Capital Region USA (a partnership between Maryland, Virginia and Washington, D. C. incorporated in October 1997), travel inquiries from overseas increased 22 percent over the previous year.
- Maryland welcomed and assisted over 1,900,000 visitors through the State's network of Welcome Centers.
- Hosted four television crews (two domestic, two foreign) who produced feature programs on Maryland.
- Participated in 20 consumer travel shows reaching 325,000 potential tourists.
- Undertook two major product development initiatives aimed at exploiting tourism market opportunities associated with Maryland's contribution to the development of the National Road and the defense of the nation during the War of 1812.

MARYLAND FILM OFFICE

- Responded to 75 inquiries for location information and photography, a 36 percent increase over the previous year.
- Supported 27 location surveys or scouts, a 17 percent increase over the previous year.
- Maryland saw a total of 400 filming days in FY 98, a 27 percent increase over FY 97.
- With its increased marketing budget, the film office increased its trade advertising by 900 percent (total of three ads in FY 97, 27 ads in FY 98).
- For the first time, Maryland was a sponsor of events at the annual Sundance and Slamdance film festivals.
- The film office hosted over 120 film company executives at a party and baseball game between the Baltimore Orioles and the California Angels at Anaheim Stadium.
- An 18-second trailer, produced for all Maryland movie theaters, was designed to inform audiences that the particular movie they were about to watch was filmed in Maryland.

MARYLAND STATE ARTS COUNCIL

- The Arts Council awarded \$6.13 million in general operating, project and incentive grants to 400 Maryland organizations.
- In an effort to reach under-served populations and a broader range of organizations, the arts council made 96 mini-grants to newly formed organizations that do not qualify for traditional general operating support.
- Grants were awarded to 96 individual artists with talents in music, dance and literature, as well as painting, sculpture and other media.
- A total of \$1,264,675 was granted to the State's 24 local arts councils, supporting even further outreach through their regranting programs.
- The Arts Council provided 840 matching grants to support the work of 250 artists, who performed and taught in 700 Maryland schools.
- Nearly 7,000 performances and workshop sessions served more than 160,000 school children.
- The Arts Council was one of ten state arts agencies that formed a partnership to foster the use of innovative technologies to catalyze product development and design applications.
- The Multi-Cultural Outreach Program was initiated to identify, encourage, assist and support projects by minority community artists and organizations, as well as to promote awareness of the arts within those communities.
- The Arts Council initiated a program whereby local arts councils can use \$4,000 of their State funds to match federal dollars in support of local arts programming aimed at under-served populations.
- The Maryland State Arts Council celebrated its 30th anniversary.

*The Arts Council
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organizations.*

*The Division
provides
administrative
and support services
for the
Department*

The Division of Administration provides administrative and support services for the Department through the Contracts and Procurement, Human Resources Management, General Services, Budget and Finance and Information Services offices.

Office of Contracts and Procurement

The Office of Contracts and Procurement reviews and approves all department contracts and purchases for the Department. The Office prepares specifications, administers the bidding processes, reviews contract documents and purchase orders for award and processes invoices and reports.

Office of Human Resources Management

The Office of Human Resources Management provides development and management of all personnel and staff development programs to ensure a productive workforce for the Department. Activities include: recruitment, employer/employee relations and benefits and personnel evaluations.

General Services Office

The General Services Offices provides logistical support for the department including facilities, equipment, maintenance and supplies for the Department.

Budget and Finance Office

The Budget and Finance Office provides departmental and program budget and performance measurement support for the Department. The Office reviews, monitors and develops all budget activities and provides central general accounting services for the department.

Office of Information Services

The Office of Information Services provides systems development, data processing, telecommunications and microcomputer support and services.

FY 98 HIGHLIGHTS

- Formed a task force to study contractual employment issues within the Department and issued a report that included 14 recommendations to senior management.
- Provided voice and data connectivity to the Maryland State Arts Council employees, effectively networking them with the Department's computer services, voice mail, e-mail and Internet services.
- Installed FMIS downloading and reporting software that allows DBED to download financial data to the network and thereby develop custom reports for review and analysis.
- Installed a second communications link to the Internet that will be used to support and host DBED's website as well as other internet-related content such as BLIS and the Maryland Film Office homepage.
- Served as a pilot agency for the FMIS fixed asset accounting module currently being developed by DBM and scheduled to be implemented this year



Installed a communications link to the Internet that will be used to support and host DBED's website as well as other internet-related content such as BLIS and the Maryland Film Office homepage.

Visit DBED On-line!

The Department has developed Websites on the internet to assist customers in obtaining information on business development, licenses and permits, manufacturing and software industry consortia, international business opportunities, as well as tourism, filmmaking and arts activities across the State.

Locating or expanding a business in Maryland? Starting a new business in Maryland?

To access information on business assistance programs, marketing strategies, find suppliers and partners, and locate other business information, products and services across the State.

Visit
www. *dbed.state.md.us/dbed*

What makes doing business in Maryland Total BLIS?

The Maryland Business License Information System, an internet-based system that helps business owners determine which State permits and licenses are required to operate their businesses.

Visit
www. *blis.state.md.us*

Looking for information that can help your manufacturing or technology/software business become more competitive in the global market?

The Maryland World Class Manufacturing Consortium website can help Maryland manufacturers learn more about achieving world class manufacturing status.

Visit
www. *mwcmc.org*.

The Maryland Software Industry Consortium (MDSWIC) is a group of Maryland information technology and software companies seeking excellence through continuous product, service and organizational improvement.

Visit
www. *mdswic.org*

Interested in going international? Discovering markets around the world?

To learn why more Maryland businesses are getting involved in export activities to foreign markets, what the State has to offer in product and services for the export market, and why Maryland is the location of choice for many foreign-owned firms.

Visit
www. *mdisglobal.org*

Looking for exciting places to see and things to do?

The Maryland Office of Tourism Development's website provides information on Maryland's history, shopping, dining and accommodations, attractions and the State's calendar of events. Discover why we say Maryland has "So Many Things To Do. So Close Together."

Visit
www. *mdisfun.org*

Want to learn more about the filmmaking industry in Maryland?

To get information on recent productions, the 1998 Maryland Regional Production Guide and services provided by the Maryland Film Office.

Visit
www. *mdfilm.state.md.us*

Interested in the arts in Maryland?

The Maryland State Arts Council website provides information on the Maryland State Arts Council and its programs. The website also has links to various arts organizations across the state.

Visit
www. *msac.org*

FISCAL YEAR 1998 APPROPRIATION

Office of the Secretary

Office of the Secretary	\$ 894,083
Communications Office	\$ 450,050
Legislative Liaison	\$ 213,877
Internal Audits	\$ 178,965
State Technology Coordinator	\$ 104,958
MD Economic Development Commission	\$ 25,000
Assistant Attorney General	\$1,087,593

Total	\$2,954,526
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Division of Administration

Office of the Assistant Secretary	\$2,049,067
Office of Information Services	\$ 628,119

Total	\$2,677,186
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Division of Marketing

Office of the Assistant Secretary	\$ 769,068
Office of Business and Economic Research	\$ 871,674
Office of Business Development	\$ 897,949
Foreign Investment Group	\$ 285,204
Office of International Business	\$1,595,375
Foreign Offices	\$1,097,000
Office of Industry Sector Assistance	\$ 519,030
Business Location Group	\$ 433,967
National Marketing	\$ 296,439

Total	\$6,765,706
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Division of Financing Programs

Operating

Office of the Assistant Secretary	\$1,009,602
MD Industrial Financing Authority (MIDFA)	\$1,019,208
MD Small Business Development Financing Authority (MSBDFA)	\$1,155,356
Day Care Facilities Administration	\$ 289,666

Community Financing Group Administration	\$ 720,852
MD Enterprise Investment Fund and Challenge Programs	\$ 234,068
Capital	
MSBDFEA	\$6,754,746
Day Care Facilities Loan Guaranty Fund	\$1,055,000
MD Industrial and Commercial Redevelopment Fund	\$8,500,000
MD Industrial Land Act	\$7,000,000
MIDFA Bond Insurance Fund	\$3,000,000
MD Seafood Aquaculture Loan Fund	\$ 650,000
MD Enterprise Investment Fund	\$2,000,000
Challenge Investment	\$ 750,000
Defense Adjustment Revolving Loan Fund	\$1,825,000
Total	\$35,963,498
Division of Tourism, Film and the Arts	
Office of the Assistant Secretary and Administration	\$1,051,711
Office of Tourism Development	\$5,670,366
MD Tourism Development Board	\$3,533,530
MD Film Office	\$ 666,527
MD State Arts Council	\$9,245,285
Total	\$20,167,419
Division of Regional Development	
Division of Regional Development	\$13,166,231
Brownfields Revitalization Incentive Fund - Capital	\$ 500,000
Total	\$13,666,231
TOTAL	\$82,194,566
Economic Development Opportunities Program Fund <i>(Sunny Day Fund)</i>	\$29,778,536
GRAND TOTAL	\$111,973,102

TELEPHONE DIRECTORY

Office of the Secretary

410-767-6300

Secretary

410-767-6302

Deputy Secretary

410-767-6301

Attorney General's Office

410-767-6446

Equal Opportunity Office

410-767-6464

Executive Director Maryland Economic Development Commission

410-767-6309

Legislative Office

Baltimore (May - December)

410-767-6312

Annapolis (December - May)

410-260-6307

Communications

410-767-6319

Internal Audits

410-767-2286

State Technology Coordinator

410-767-0167

Forum for Rural Development

410-767-6518

Division of Administration

410-767-2201

Budget & Finance

410-767-2360

Contracts & Procurement

410-767-2208

General Services

410-767-2202

Human Resources

410-767-2235

Information Services

410-767-3391

Division of Financing Programs

410-767-2201

Community Financing Group

410-767-6356

Day Care

410-767-6345

Maryland Industrial Development Financing Authority (MIDFA)

410-767-6376

Maryland Small Business Development Financing Authority (MSBDFa)

410-333-4270

(privately managed)

Investment Financing Group

410-767-6358

Trade Financing

410-767-6382

**Division of
Marketing**

410-767-6870

1-800-811-0051

Business Development
410-767-6658

**Business & Economic
Research**
410-767-6398

International Business
410-767-0684

**Division of Regional
Development**

410-767-0095

Regional Response
410-767-0093

**Community Infrastructure
Development**
410-767-6390

Technology Support
410-767-6529

Business Advocacy
410-767-6541

Regulatory Policy
410-767-6488

Program Policy & Evaluation
410-767-6470

Finance & Administration
410-767-0266

**Division of Tourism,
Film and the Arts**

410-767-6266

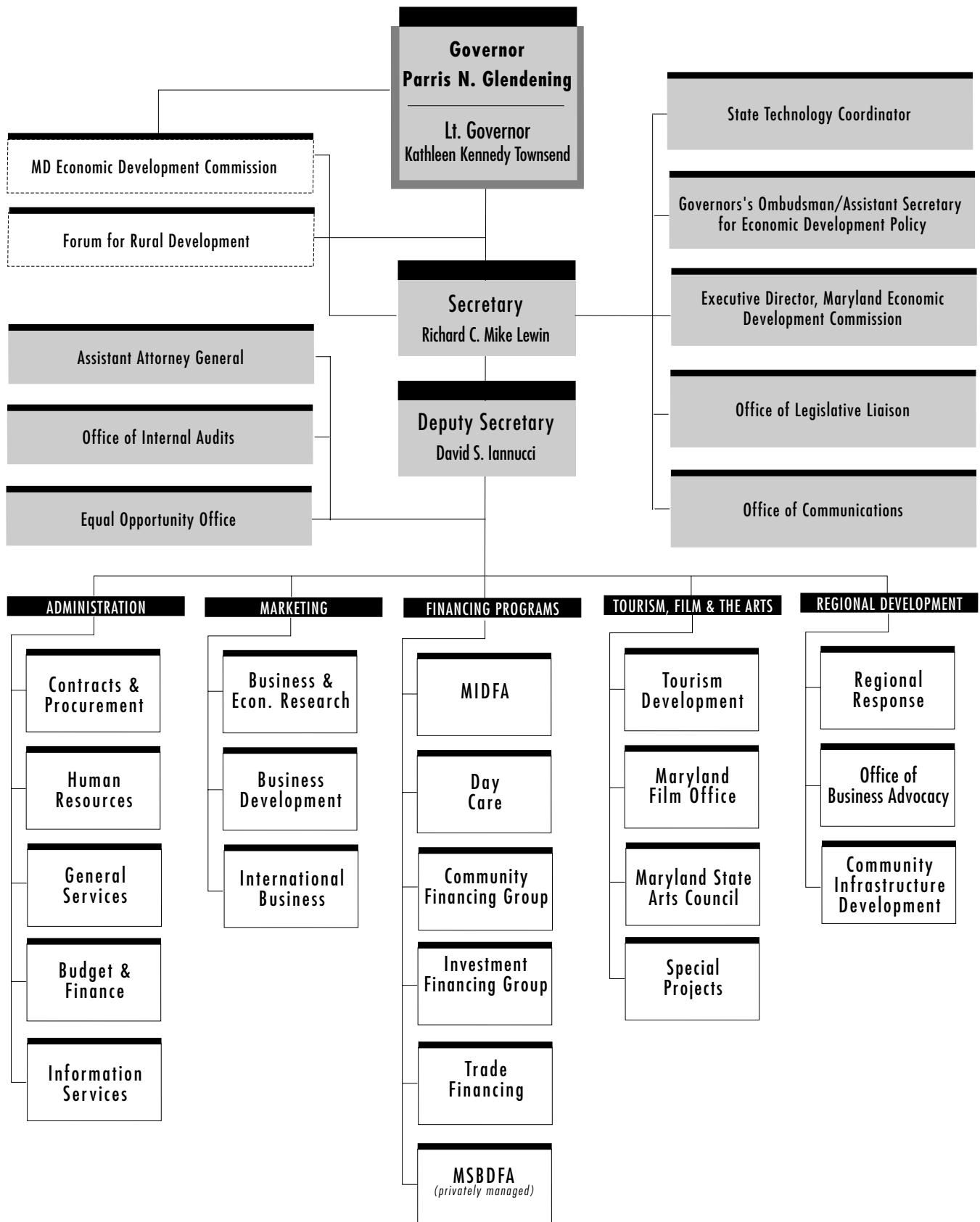
Maryland Film Office
410-767-6340

Maryland State Arts Council
410-767-6551

Tourism Development
410-767-6299

Special Projects
410-767-4712

ORGANIZATION CHART





Parris N. Glendening
Governor
Kathleen Kennedy Townsend
Lt. Governor
Richard C. Mike Lewin
Secretary

Maryland Department of Business &
Economic Development
217 East Redwood Street
Baltimore, Maryland 21202
1-800-541-8549

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