



**COMPREHENSIVE ECONOMIC
DEVELOPMENT STRATEGY (CEDs)
2013-2017
Updated December 20, 2014**

For the
Tri County Council for Western Maryland Development District
Region 4A, Maryland
Garrett, Allegany, & Washington Counties

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Comprehensive Economic Development Strategy

2013-2017

For the

Tri-County Council for Western Maryland Economic Development District

Garrett, Allegany and Washington Counties

Executive Summary

Introduction

Tri-County Council for Western Maryland is designated by the US Department of Commerce Economic Development Administration as the Economic Development District and regional planning organization. The region is comprised of the panhandle of Western Maryland and includes Garrett, Allegany and Washington Counties. The Comprehensive Economic Development Strategy was formulated over the course of the last year and will serve as the five year plan for the period from 2013-2017.

The Strategies Committee servers as regional convener for ideas and suggestions to mold the CEDS document into a truly regional economic development plan. The Committee aids in the development of short and long term projects, the development of surveys and the assessment of the region. The Council staff interpolates the findings from the survey documents to determine the changes needed to the CEDS document.

The Strategies Committee meets 4-5 times per year and makes recommendations to the full TCCWMD Board of Directors for the CEDS document.

The initial Tier I-III initiatives were developed using the peer learning group and survey from 2012. This included an online survey as well as a workshop exercise at our first annual summit to gather public input on the most important economic drivers. It was decided by the committee in 2013 that a new survey should be developed that was geared directly at SWAT analysis of economic development.

A board appointed Strategy Committee worked with the Council to develop an online survey, which was developed over the course of 3 months, from December 2013-February 2014. The survey was designed to indicate what the public felt were strengths and weaknesses for the region when it comes to Economic Development. The Council had a major outreach and marketing campaign to encourage participation in the survey and increase results.

The results from this survey are continuing to be analyzed and will be incorporated into the CEDS as new Tier 1-III initiatives. Additional initiatives and strategies will be developed through the extrapolation of the data and the realization that the private sector input may be very different from what the public sector feels should be the priorities.

CEDS Outreach Methodology for Planning

Online Survey 2014 - Council staff worked with the Chambers of Commerce and various civic organizations to market the survey. Staff also made several presentations to various organizations around the area to promote the survey and convey the importance it will have on determining the region's future. Additionally, five \$100 visa cards were given out to encourage participation.

The survey was launch on March 27, 2014 and remained open through April 30, 2014. Marketing efforts were made by 7 civic organizations, 3 Chambers of Commerce, 3 Economic Development Offices, 2 Educational Institutions, several other non-profits and the newsletters from Tri-County Council. Over the course of the month of April 2014, each of these organizations made at least two attempts to reach out to their members and the general public for responses. When the survey closed we had 776 responses from across the region.

Review of Responses

- The majority of Respondents were full time residents of Garrett, Allegany, or Washington Counties in Western Maryland
 - 82.99% (R=644) resided full time in Western Maryland
 - 17.01% (R=132) resided full time outside Western Maryland

[Based on zip code analysis, the bulk of these non-Maryland resident Respondents were PA residents in the northern adjacent counties.]
- Gender representation among Respondents was slightly skewed to female:
 - 52.97% Female
 - 43.18% Male
 - 3.85% Declined to answer
- Respondents skewed older; “millenials” (under 35) are under-represented:
 - 12.68% (R=79) are 35 years-of-age or younger
 - 44.94% (R=280) are 36 – 55 years-of-age
 - 42.37% (R=264) are over 56 years-of-age
- Respondent reported annual household income showed representative distribution:
 - 14.29% (R=89) reported annual household income under \$50,000
 - 34.35% (R=214) reported annual household income between \$50,001 and \$100,000
 - 20.55% (R=128) reported annual household income between \$100,001 and \$150,000
 - 13.96% (R=87) reported annual household income over \$150,001
 - 16.85% (R=105) declined to report their annual household income

- Respondents indicated a diverse set of role-identifications:
 - 83.97% (R=639) identified as “consumers of regional goods and services”
 - 75.03% (R=571) identified as “residential property owners”
 - 42.71% (R=325) identified as “employees of an operating business”
 - 40.21% (R=306) identified as “a board member or volunteer for one or more civic or non-profit organization”
 - 24.84% (R=189) identifies as “owners or operators of a business”
 - 10.12% (R=77) identified as “commercial property owners”
 - 9.20% (R=70) identified as “investors in one or more businesses”
 - 6.18% (R=47) identified as “an elected local official or local government employee”
 - 4.47% (R=34) identified as “an elected state official or state government employee”
 - 0.26% (R=2) identified as “an elected federal official or federal government employee”

[Respondents identified with an average of 2.97 roles.]

Summary of Findings from 2014 Survey

- Respondents are decidedly negative regarding government. Elected officials and government personnel at all levels are “called-out” as negatives in the pursuit of productive economic development. While this is clearly reflective of national trends and general disillusion with government effectiveness, it provides a call-to-action.
- Respondents verbatim responses indicate a clear mandate regarding job-creation as the region’s most pressing need; however, with exception of our higher educational institutions the region’s infrastructure is generally not perceived as meeting investor expectations. And, while higher educational institutions are viewed as meeting investor expectations, Respondents do not see these assets producing a sufficiently skilled and prepared workforce.
- Respondents regard the region’s proximity to large consumer markets as its strongest asset. There is a clear consensus that this asset should be leveraged to drive economic development for both “import” (tourism) and “export” (manufacture & distribute) purposes. Respondents strongly support the development of the existing tourism economy; respondents strongly support the development of export-oriented business sectors: Manufacturing and Agri-Business.
- Respondent opinion is mixed regarding the region’s ability to drive technology-related economic development. While Respondents clearly associate strong opportunity associated with technology-related business development, regional weaknesses in infrastructure are also clearly expressed. Long-term investments and efforts to develop broadband infrastructure have not been recognized.
- By a significant factor, Respondents support development of Renewable Energy assets (“wind, solar, etc.”) over Traditional Energy assets (“gas, coal, etc.”).

- Respondents regard the lack of “shopping & lifestyle services” as the region’s biggest infrastructure gap, yet do not view strong opportunity associated with the development of Retail Service Industries. However, Respondents do view more opportunity associated with the development of Retail Service Industries than with the development of Traditional Energy assets (“coal, gas, etc.”).

General Plan of Action

1. Promoting Development

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

The Council is hopeful that defederalization of current loan funds will occur in the near future allowing the Council to leverage other federal funds. This will allow the Council to recapitalize the current loan funds and put more money to work on the streets. In this economic downturn, access to capital has been the number one reason that businesses are not starting or expanding.

The Council has begun working with Frostburg State University who recently assumed the responsibility of running the regional Small Business Development Center. In an effort to not duplicate services, long range plans are being developed to identify strengths and weaknesses of both organizations.

2. Fostering Effective Transportation Access

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

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

Most recently, the Council coordinated another grant with the Maryland Transportation Administration to serve as the lead in the development of creating an updated regional coordination transportation plan for the western region of the State.

3. Enhance and Protect the Environment

The Council has targeted natural resources as one of the area's key assets and has worked to promote the responsible use of the environment. One of the key committees for the CEDS document is the Agriculture and Natural Resources group. All projects funded through the Council and its agencies are subject to state Clearinghouse Review, making sure that the

Maryland Department of Environment and all appropriate state agencies have a comment and recommendation period prior to implementation.

The Council has informed the public of the new EDA initiative that will help private business owners with investments to make their facilities “greener” and more energy efficient. With the declining economy investments such as this, even subsidized, are a hard sell.

Recently in the region, a major topic of discussion is that of allowing access for drilling the Marcellus and Utica Shale formations for natural gas development. Currently the Governor has placed a moratorium on such development until 2015. A task force is in place to study this issue extensively based upon best practices. Additionally, measures are expected to be put in place to guide how development should occur if it is deemed “safe” and allowed under Maryland law. This industry is seen as a huge economic boost to the area as nearly two thirds of the region has gas bearing shale under the ground. Many leases are already in place and the economic boom is being felt in both Pennsylvania and West Virginia to the north and south respectively.

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

4. Workforce

Workforce continues to be a key issue facing the area. This topic has been addressed at its grass roots level, namely education. Since many of the young people of the area move to find employment, it is essential to promote workforce at a young age and build from the bottom up. Tri-County Council for Western Maryland also serves as administrator for the Regional Education Service Agency for the three Counties.

In addition to the building of workforce, the Council also works closely with the local representative from the Maryland Department of Business and Economic Development (DBED) to promote adult education. DBED works with companies, new or expanding, to train workers for specific needs. Many of these trainings are in cooperation with local community colleges with programs tailored to suit those needs.

Through DBED and the Appalachian Regional Commission the Council has worked with Allegany County to ensure all public schools have high speed internet available in all classrooms. This is a major achievement for a rural county. It is anticipated that a new project under the NTIA program will provide fiber access to 90% of public facilities in the Western Maryland Region within the next two years.

Typically, unemployment in Western Maryland has been higher than in most parts of the state with the exception of Washington County which historically has been around 4%. With the economic slow-down, Washington County has the second highest unemployment in the state with rates over 11% last year and now hovering just below the double digit range.

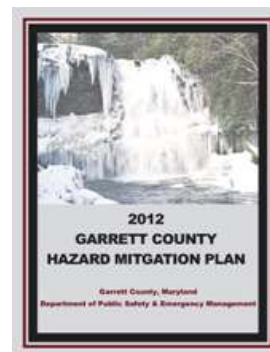
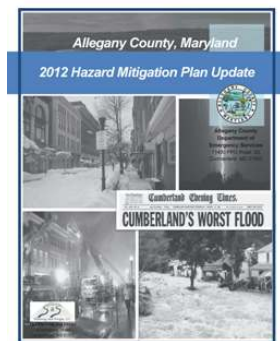
5. Promote Technology – The Council encourages the submittal of technology related projects for consideration for Appalachian Regional Commission funding. The rural tri-county area has one of the newest wireless technologies in place in an effort to keep

broadband costs affordable. In addition, the Council is very actively involved in Geographic Information Systems, working with a regional GIS users group to encourage new projects and up to date software systems.

6. Obtaining and Utilizing Funds - The Council utilizes funds available and always seeks to find other venues to promote business and technology. Funds from local governments help match the EDA Planning Grant that allows the creation of the CEDS. Additional funds from Federal, State and local partners continue to become increasingly difficult to obtain. The Council, though it's planning process and detailed work program, works to maximize the use of all funds.

7. Disaster Resiliency

The State of Maryland passed legislation in 2000 requiring all Maryland Counties to have Hazard Mitigation Plans adopted with updates every 5 years.. The Council worked directly with the consultant to create the GIS maps that identified potential areas of hazard. We continue to keep on file the mitigation plans that are currently in effect. These plans continue to be the most comprehensive documents for responding to a disaster within the Tri-County region. The plans are designed to assess the entire county and provided mitigation strategies for any possible occurrence or threat. These documents remain on file at Tri-County Council and are utilized as the plan of action for Economic Resilience.



Identification of Tier 1-3 Initiatives

Tier 1 Strategic Initiatives

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

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

The Plans of Action for the first year of the 5 year CEDS are designed to implement the Tier 1 initiatives that were chosen as the most important. These initiatives will be revisited in subsequent years to determine which initiatives were completed and place new priorities on those that may have become regionally more significant.

1. Business and Economic Development
 - a. Key Issue: Entrepreneurship and Small Business
 - b. Related and Supporting Issues
 - i. Communications Technology
 - ii. Energy-Traditional (Fossil Fuels, Marcellus Shale)
 - iii. Healthcare
 - iv. Advanced Manufacturing (Small, Medium and Large Scale)
 - v. Access to Capital
 - vi. Cost of Employer Provided Benefits
 - vii. Need for Targeting Activity Clusters: Focus on Manufacturing
 - viii. New Incentives for Businesses
2. Business and Economic Development
 - a. Key Issue: Competitiveness with Other Regions
 - b. Related and Supporting Issues
 - i. Communications Technology
 - ii. Energy-Traditional (Fossil Fuels, Marcellus Shale)
 - iii. Healthcare
 - iv. Advanced Manufacturing (Small, Medium and Large Scale)
 - v. Access to Capital
 - vi. Cost of Employer Provided Benefits
 - vii. Need for Targeting Activity Clusters: Focus on Manufacturing
 - viii. New Incentives for Businesses
3. Infrastructure
 - a. Key Issue: Broadband and High Speed Infrastructure, Affordability and Access
 - b. Related and Supporting Issues

- i. Streets, Roads and Bridges
 - ii. Water and Sewer
- 4. Infrastructure
 - a. Key Issue: Water and Sewer
 - b. Related and Supporting Issues
 - i. Broadband and High Speed Infrastructure, Affordability and Access
 - ii. Streets, Roads and Bridges
- 5. Education
 - a. Key Issue: Coordination Between High Schools and Colleges for Vocational Training
 - b. Related and Supporting Issues
 - i. Availability of Continuing Education Opportunities
 - ii. Coordination Between Community Colleges, Private Colleges and Universities
 - iii. Maintaining Strong Post-Secondary Colleges and Universities
 - iv. Availability of Career and Technical Schools
 - v. Student Access and Affordability of Post-Secondary Education

Tier 2 Strategic Initiatives

Tier 2 initiatives were ranked high and seen as issues of regional importance but in recognizing the limited amount of resources available to complete various initiatives these items were placed in a lower Tier. For this reason, Strategic Initiatives for these items were not created; however, these issues will be further reviewed to see how they play a key role for Tier 1 initiatives. Depending upon the types of resources that are available in the upcoming year, the priorities of the Committee remain flexible to elevate Tier 2 issues to Tier 1 based upon availability of funding to complete the task. These items will also be evaluated against the outcome of this year's 5 primary issues. The Categories for Tier 2 issues are as follows:

1. Workforce
2. Growth Planning and Management
3. Local Government
4. Social and Cultural
5. Healthcare
6. Natural Resources
7. Energy

Tier 3 Strategic Initiatives

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

Targeted Plans of Action - Tier 1 Initiatives

The CEDS document has five Tier 1 initiatives that were based upon total score and importance and determined through the outreach initiatives that included the survey results and general public input. Additionally, the top five initiatives were then picked by the Committee as the focus for the region during the upcoming 12 month period (July 1, 2012 – June 1, 2013).

Strategic Initiative 1: Broadband and High Speed Infrastructure and Access

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

Objectives:

1. Connect all community anchor institutions (CAI) to high speed internet in order to offer the best possible service to our citizens. The National Telecommunications and Infrastructure Administration (NTIA) has described “Community Anchor Institutions” as schools, libraries, medical and healthcare providers, public safety entities, community colleges and other institutions of higher education, and other community support organizations and entities.
2. Develop long term plans of action to increase the availability of access to broadband services to residential areas.
3. Increase the number of providers in the region in order to foster competition in the region in order to bring the price of services down.
4. Deploy a fiber backbone throughout the region with multiple locations for Points of Presence (POP) thus lowering backhaul fees generally associated with higher costs.
5. Determine the locations across the region that are currently not served or underserved.
6. Increase availability of Broadband access to the region’s businesses at an affordable price making them nationally competitive to conduct business.
7. Completion of detailed long-term investment for broadband access and best practices for development of infrastructure.

Plan of Action:

1. Under the current American Reinvestment and Recovery Act (ARRA) the State of Maryland, in Cooperation with the Maryland Broadband Cooperative (MDBCC), received a grant in the amount of \$115 million that will install fiber backbone across the entire state of Maryland. The State has worked directly with local governments to determine the CAI’s that would be feasible to connect to based upon the award. The fiber installed across the region will provide access through the state of Maryland to the majority of schools, libraries, public safety entities and health care institutions.
2. Fiber that is being installed under the ARRA grant will serve a two-fold purpose. While all of the fiber being laid will belong to the State, which is only eligible to serve public and non-profit institutions, additional strands of fiber will also be shared with the Maryland Broadband Cooperative. The Cooperative will be permitted, under a long term agreement, to use the installed fiber to provide services to private sector individuals and businesses primarily by using Internet Service Providers to act as the last mile provider.

3. The MDBC is a non-profit entity that operates in the traditional format of a cooperative by making the infrastructure that it owns available to any member. Essentially the fiber that is located statewide will be available for members to use to provide services to their customers. This means that many small ISP's could potentially offer services in areas across the state were they currently do not own infrastructure.
4. The fiber backbone is scheduled to begin construction in the fall of 2012 with completion to occur prior to September of 2013. The fiber will consist of multiple Points of Presence across the region. In the past, companies in Western Maryland were forced to pay back-haul fees which are based upon mileage to the nearest POP. The back-haul fees are based upon a round trip mileage to the POP. More POPs in the region mean a lower cost of doing business for the ISPs which then translates into lower end user services and hopefully an expansion of the service area because of these savings.
5. Each state was awarded an ARRA grant to define the areas across the region which were either not served or underserved in order to create a strategic plan as to where fiber and other services were most needed in the future. In the state of Maryland, the grant was awarded to the MDBC, which has developed a nationally used model to map the services. A final plan is expected this year, which will serve as a guideline for investments in the future.
6. The deployment of fiber across the region means a substantial increase in the attraction of new businesses and retention of existing businesses that will need these services to thrive in their competitive industry.
7. All three counties are in various stages of completing in depth studies to determine deployment strategies and areas of investment. The studies not only identify the geographical areas that are most in need, but also the most probable approaches for deploying services to those areas. These may be a combination of wifi, fiber and other technologies that will be used to reach remote areas. Additionally, the studies will also show the challenges the region faces with current services that are being offered and how they may be overcome.

Strategic Initiative 2: Competitiveness with other Regions

Goal: Become more competitive with other regions by making the area an attractive place to do business. The competition for new businesses in the region is no longer just a matter of competing locally. The market place is now a global one, and the region is preparing itself to compete world-wide by providing the infrastructure and training needed.

Objectives:

1. Increase the quality of Education in the region to provide a skilled workforce in targeted industry sectors.
2. Decrease local regulation and fast track permitting needed to ensure a minimal amount of delays involved with locating a project in the region.
3. Increase incentives to locate a business in Western Maryland.
4. Create the technology based infrastructure needed to compete in a global market place.
5. Communicate and coordinate between counties in the region to ensure that businesses will not be lost to other areas in the Mid Atlantic.
6. Provide specialized industry specific training to ensure that new businesses can have a knowledgeable workforce in a minimal timeframe.
7. Provide the necessary tools for local businesses to compete in a global market.

Plan of Action

1. Across the region this calls for the development of new schools with new technology and courses that are industry specific. Classes will continue to be created that will focus on technology based industry sectors such as computing, machinists, robotics, nursing, biotechnology and renewable energy sources.
2. Create and improve fast track permitting processes and other regulatory obstructions such as environmental reviews and occupancy approval.
3. Expand opportunities for Enterprise Zones and the incentives associated with such areas. Market hub zones to industries that can use them to their advantage when working with government contracting. Implement a Foreign Trade Zone in the region to attract businesses which wish to do large scale overseas transactions.
4. The entire region is undergoing a study that will create a best practices design for increased broadband throughout the region. Implementation of the entire plan will take many years, but steps are already in place for the first phase of implementation. The majority of CAI's will be served with strategic fiber locations being put in place to accommodate the long term plan. This plan includes serving the critical business and industry sectors as well as targeting locations close to cell towers, which is considered one of the up and coming modes of connecting to the internet via an air card or some other tethering device.
5. The counties currently work with the state of Maryland on communication and coordination when dealing with new businesses entering the area. There is also a considerable amount of communication via the Tri-County Council's role as Economic Development District. The individual county's Economic Development Departments play a critical role on the projects and CEDS committees.
6. The local community colleges play an integral part in developing curriculum that will serve the needs of local businesses. Classes can be designed to be industry specific by working directly with companies that require a specific type of training. Additionally, the local Boards of Education continue to broaden their curriculum to prepare students

for post secondary education. This is done on a variety of levels from Career and Technology Centers to offering pre-nursing classes at the High School Level.

7. The region is currently undergoing a three year initiative designed to educate and inform local businesses how to compete globally. The grant was provided by the Appalachian Regional Commission and is being administered through the Maryland Department of Business and Economic Development. The initial phase of this grant was designed to locate and identify those companies that may have the potential to import and export products. Surveys were conducted through the region's chambers of commerce as well as using industry guides. These industries were contacted to participate in regional training exercises designed to be an introductory class on doing business overseas. Additional opportunities were provided for businesses to meet one-on-one with individuals from various private and government sectors that would aid with transitioning into this market.

Phase 2 and 3 are designed to bring foreign companies to the local marketplace and put them in touch with businesses that have potential for entering the global arena. Additionally, scholarships are provided to allow local companies to participate in international trade shows and meet directly with foreign companies in their specific industry sector.

Strategic Initiative 3: Coordination between High Schools and Colleges for Vocational Training.

Goal: The goal for coordination between high schools and colleges for vocational training is to provide training across the region for many needed vocations at the High School level while allowing a smooth transition for students to further their training at the local college level.

Objective:

1. Increase the opportunities for students in the vocational trades at the high school level which will prepare them for college curriculum.
2. Increase the number of students going into the building and trade industry
3. Prepare a workforce for the traditional manufacturing sector
4. Increase the skill level for IT related fields in preparation for college

Plan of Action:

1. While vocational schools exist across the region, the classes offered are not uniform. Just recently, Garrett County put a career center in place, which is already expanding the opportunities for students in that area. Many of the classes offered are now preparing students for college at the high school level such as nursing, IT, networking and law enforcement. Coordination through Western Maryland Education Consortium can allow for a smooth transition from any of the area's career centers to a college major that will strengthen their education.
2. By making the career centers an extension of High School rather than an alternative, the career centers are attracting more students. By expanding the curriculum more students will choose the trades industry which is desperately in need of workers.
3. Offer classes specific to industry sectors by working directly with regional manufacturers to develop classes unique to our area
4. Traditional manufacturing is now evolving into advanced manufacturing meaning that every aspect of business now includes computer aided machinery. By training students on devices like CNC machines and computer devices for industries like automotive repair, it is a key step towards preparing them for college classes that are related to industry.

Strategic Initiative 4: Water and Sewer Infrastructure Improvements

Goal: Improve and maintain the overall water and sewer service throughout the region.

Objective:

1. Meet the Total Maximum Daily Load (TMDL) requirements as set by the State of Maryland
2. Provide the quantity and quality of water necessary to serve the region
3. Provide adequate sewer resources to serve the region and allow for expansion as needed by residential and business growth.
4. Separation of combined storm water and sanitary sewer

Plan of Action:

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

Strategic Initiative 5: Entrepreneurship and Small Business

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

Objective

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

Plan of Action

1. Currently the Council has 9 distinct loan funds with the sole purpose of providing gap financing to small businesses to create or retain jobs in the region. Attempts to recapitalize this fund in any significant amount have occurred over the last several years with very limited success. The current funds are being spent down rapidly as credit is becoming harder to receive from the banks. The Council has a two-fold plan of action in place to try to increase available funding. The first strategy is the creation of a 501c3 that will allow the Council to pursue other avenues for capitalizing a fund. The Council recently acquired a non-profit agency from an inactive agency and is in the process of reactivating that agency. The second strategy is the process of consolidating the several EDA loan fund accounts into one account. While this action in itself does not increase capital, it puts in place an immediate tool to match other federal dollars should EDA decide to eliminate the federal status of those funds which have already been revolved several times.
2. The Council relocated its offices to Frostburg, Maryland 3 ½ years ago and currently sublets office space to the Small Business Development Center. The relationship with the SBDC has strengthened our lending capabilities by providing a direct line of communication with the SBDC for TCC and our clients. The SBDC provides resources to small businesses in the form of financial projections, business plan support, and general counseling. Most recently, the SBDC has begun negotiations to increase the amount of space that they will occupy from TCC, which in turn will allow for expanded services for new and existing businesses. Additionally, the SBDC is working with the individual counties in the region to provide in-county support in coordination with the offices of Economic Development. Counselors are in place in Allegany and Washington Counties and they are currently working to improve services in Garrett County.
3. The SBDC provides many training classes throughout the year in each county as well as working with SBA which also offers many training classes on their various programs

including the SBA 504 loan guarantee programs. These classes should increase as the number of personnel increases in the region.

4. Currently, incubator space is available in all three counties, although as new businesses emerge and few graduate from those facilities there is an increased demand for those types of spaces. These spaces are very necessary as they decrease the overhead for new businesses and provide onsite counseling to those companies. Several counties have expressed an interest in providing new incubator space, particularly for small industrial firms. The current incubator spaces are more tailored for an office environment.
5. Many of the small businesses are not aware of the programs that are available to support their start-up and growing needs. For this reason, Tri-County Council for Western Maryland will be holding a regional summit in Washington County in October 2012, which will feature a full day educational session for banks, business owners and potential entrepreneurs. The Lenders Loan Forum will feature programs available from TCC, SBA, MEAF, DBED and traditional lending institutions. Advertising for this event will begin at least a month in advance and will not only offer education on these many programs but will also offer an opportunity for interaction between businesses and potential funders in a question and answer session.

Economic Clusters –

Western Maryland has a long, rich tradition of manufacturing, and as such, it is a cluster industry in the region. Starting in the early 1900's with employers such as Kelly Springfield, textile mills and steel producers it still remains one of the most vital and consistent industry sectors in the region. While many of the old factories that employed thousands of employees have closed down, the region has diversified to include many medium sized manufactures that employ 500 – 1,000 employees and thus become more stable.

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

Currently employers such as Newpage paper mill, American Woodmark, and Closetmaid, have made substantial long-term investments into the community. These long term investments ensure the major presence of the CSX mainline and rail yard.

High speed internet access is available in most of the urban areas of the region, and is becoming more economical for companies to consider relocating. Diversity is the key to the economy, and many companies are taking advantage of low labor costs combined with affordable technology costs. Washington County has the jobs related to this field, but all three counties consider this industry very important and see it growing in the future.

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

Many of the manufacturing based clusters in the region are related to the housing industry, such as; closet fixtures, window blinds and cabinetry. With the decline of the housing market, all of these industries are downsizing and feeling the economic strain. Unfortunately, with relying on cluster-based industry, if that industry is in decline then a major portion of your economy is also in decline.

Mining and natural resources also make up an economic cluster in the region. Western Maryland is home to mines from Washington County to extreme Garrett County. The eastern-most portion of the region is largely focused on rock quarries. With huge tracts of limestone and sandstone available, this industry is a major source road and building raw materials. As you move further west through the region, quarries can still be seen, but coal mines from Western Allegany County and through most of Garrett County contribute a large amount of revenue to the economy. In future years, natural gas exploration and wells, will most likely become commonplace as this industry is already taking a foothold in the states to the north and south. There have been many discussions about targeting this industry and the

development that occurs around it, but currently the practice is not legal in the State of Maryland. This will become a major focus of the region once regulations have been passed to allow this process, but until it is permitted it is unlikely that any development will occur.

Prioritized List of Projects

Methodology

The Council begins seeking projects in February of each year by holding a meeting with the Strategies Committee. Each County has appointed a Point of Contact for projects from their county. The initiatives are discussed and the procedure and timelines are set at this meeting for submission of projects to TCCWMD.

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

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

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

Prioritized Projects List FY 2014 (next page)

ARC/EDA
PRIORITY LIST FY 2015

AREA DEVELOPMENT PROJECTS

	PROJECT NAME	CO	ARC	Other Federal	Local	Private	TOTAL
NR	<u>Consolidated Technical Assistance Program (CTA)</u>	Multi	\$175,000	\$0	\$175,000	\$0	\$350,000
1	<u>Keyser's Ridge Waste Water Treatment Plant</u>	Garrett	\$0	\$900,000	\$900,000	\$0	\$1,800,000
2	<u>AllCoNet Backbone Upgrade – Phase II</u>	Allegany	\$150,000	\$0	\$150,000	\$0	\$300,000
3	<u>Last Mile Wireless – Phase III</u>	Garrett	\$250,000	\$0	\$250,000	\$0	\$500,000
4	<u>Automotive Technology Advanced Workforce Development</u>	Allegany	\$42,780	\$0	\$42,780	\$0	\$85,560
5	<u>Penn Mar Sewer</u>	Washington	\$400,000	\$0	\$0	\$400,000	\$800,000
6	<u>Telehealth Initiative to Enhance Community Healthcare</u>	Garrett	\$62,000	\$0	\$0	\$62,000	\$124,000
7	<u>Geochemistry Laboratory</u>	Allegany	\$100,000	\$0	\$100,000	\$0	\$200,000
8	<u>Allied Health Program Expansion</u>	Garrett	\$110,000	\$0	\$110,000	\$0	\$220,000
9	<u>Grantsville Grows Greener Strategic Plan</u>	Garrett	\$25,000	\$0	\$25,000	\$0	\$50,000
10	<u>Fiber Extension – Humbird and Cash Valley</u>	Allegany	\$150,000	\$0	\$150,000	\$0	\$300,000
11	<u>Mountain Laurel Medical Center</u>	Garrett	\$100,000	\$0	\$0	\$100,000	\$200,000
12	<u>Hagerstown Waste Water Collection System</u>	Washington	\$350,000	\$0	\$550,000	\$0	\$900,000

	PROJECT NAME	CO	ARC	Other Federal	Local	Private	TOTAL
13	<u>Boonsboro I&I Plan – Phase I</u>	Washington	\$100,000	\$0	\$100,000	\$0	\$200,000
14	<u>Engineering Lab Improvement</u>	Allegany	\$100,000	\$0	\$100,000	\$0	\$200,000
15	<u>Electro-Mechanical Engineering Program</u>	Washington	\$50,000	\$0	\$50,000	\$0	\$100,000
16	<u>Capital Equipment Project</u>	Allegany	\$150,000	\$0	\$0	\$150,000	\$300,000
17	<u>Replacement of Hancock Branch</u>	Washington	\$350,000	\$0	\$1,700,000	\$425,000	\$2,475,000
18	<u>Allegany Animal Shelter Construction</u>	Allegany	\$250,000	\$0	\$115,000	\$250,000	\$615,000
19	<u>AllCoNet White Space Radio Pilot</u>	Allegany	\$50,000	\$0	\$50,000	\$0	\$100,000
20	<u>Wireless in the Parks</u>	Washington	\$15,000	\$0	\$15,000	\$0	\$30,000
21	<u>Middle School Network Switch Equipment</u>	Allegany	\$75,000	\$0	\$75,000	\$0	\$150,000
22	<u>STEM Pavilion and Restroom</u>	Allegany	\$50,000	\$0	\$50,000	\$0	\$100,000
23	<u>Feasibility Study – Physician’s Assistant Program</u>	Allegany	\$20,000	\$0	\$20,000	\$0	\$40,000
24	<u>Food Science Laboratory</u>	Allegany	\$80,000	\$0	\$80,000	\$0	\$160,000
25	<u>Biomedical Instrumentation</u>	Allegany	\$100,000	\$0	\$100,000	\$0	\$200,000
26	<u>Biomedical Treatment for Diabetic Foot Ulcers</u>	Allegany	\$7,200	\$0	\$7,200	\$0	\$14,400
	<u>Total</u>		\$3,311,980	\$900,000	\$4,914,980	\$1,387,000	\$10,513,960

AHDS TEA 21 Projects

	PROJECT NAME	CO	ARC	Other Federal	Local	Private	TOTAL
1	<u>Crayton Boulevard Extension</u>	Washington	\$1,000,000	\$0	\$0	\$0	\$1,000,000
2	<u>North Branch Industrial Park Access Road Rehab</u>	Allegany	\$700,000	\$0	\$0	\$0	\$700,000
3	<u>Shafer Park Drive Extension</u>	Washington	\$660,000	\$0	\$0	\$0	\$660,000
4	<u>Mechanic Street Rehab</u>	Allegany	\$640,000	\$0	\$0	\$0	\$640,000
<u>Total</u>			\$3,000,000	\$0	\$0	\$0	\$3,000,000

**PRELIMINARY
PROJECT
DESCRIPTIONS**

Preliminary Project Description

Project Name: Consolidated Technical Assistance (CTA) Program

Applicant: Maryland Department of Planning

County(s): Multi

Contact: Bill Atkinson, MDP

Phone: 301 777-2161

Project Description:

Projects developed and submitted under the Consolidated Technical Assistance Program have a specific purpose: Job creation and growth; pilot or model initiatives with state-wide and regional applicability or replicability focusing on economic development and growth management; development of new industrial sectors, including that of tourism and hospitality; the beneficial allocation of public and private resources for infrastructure; the conservation of environmental resources and protection of sensitive areas as identified in the Maryland Economic Growth, Resource Protection and Planning Act of 1992; and the Smart Growth initiatives and policies of the State of Maryland and incorporated in the Appalachian Maryland State Implementing Strategy and Investment Program.

Goal:

#1 – Increase Job Opportunities and Per Capita Income in Appalachia to Reach Parity with the Nation

#2 – Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy

#3 – Develop and Improve Appalachia’s Infrastructure to Make the Region Economically Competitive

Objective: The Consolidated Technical Assistance Program represents a portfolio of projects. The ARC/CTA Program is also identified in the State Implementing Strategy and Investment Program. Each CTA Project must have a direct relationship to ARC and the State of Maryland policies, goals, objectives and strategies as defined and envisioned in the above referenced document.

Strategy: State Strategy 1.4.1: Develop and maintain economic development plans

Proposed Basic Agency: State and Local

Proposed Funding Sources:

ARC:	\$175,000
Local:	\$175,000
TOTAL:	\$350,000

Preliminary Project Description

Project Name: Keyser's Ridge Waste Water Treatment Plant

Applicant: Board of County Commissioners

County: Garrett

Contact: Cindy Sharon

Phone: 301-334-1921

Project Description:

The Board of County Commissioners of Garrett County, Maryland must construct a waste water sewage treatment plant (WWTP) for the Keyser's Ridge area to serve both residents and businesses for future development of the Keyser's Ridge Business Park. Currently, residents are utilizing septic systems and businesses are receiving waste water services from a private entity, Bruceton Farm Service (BFS), that no longer wants to provide these services and would like the County to provide these services. The Maryland Department of Environment (MDE) has issued a complaint and consent order to the Bruceton Farm Service waste water treatment plant located at 4168 National Pike Road, Grantsville, and determined that there was failure to comply with permit discharge limits for contaminants, to include Ammonia-Nitrogen, from 2007 to 2013, to an unnamed tributary of Puzzley Run, a Tier II high quality stream. BFS must pay \$40,000 in penalty fees to MDE and will pay additional significant penalty fees for any additional violations of its renewal permit. Due to the antiquated Bruceton Farm Service waste water treatment plant, the Board of County Commissioners of Garrett County, Maryland is proposing to build a new WWTP to terminate discharges from the BFS Plant. The proposed project's construction costs of approximately \$1,800,000 will service 50,000 Gallons Per Day (GPD) to meet the needs of the Keyser's Ridge Business Park and 23 residential customers. A discharge permit has already been obtained from MDE.

ARC Goals to Be Addressed, Objectives, and Strategy:

ARC Goal 3: Develop and Improve Appalachia's Infrastructure to Make the Region Economically Competitive

State Objective 3.2: Increase the number of marketable industrial sites within all three counties including the conversion and rehabilitation of vacant industrial facilities.

State Strategy 3.2.1: Provide the basic infrastructure to new industrial sites and rehabilitate vacant industrial facilities.

Proposed Base Agency: CDBG

Proposed Funding Sources:

EDA	\$ 900,000
Garrett County	<u>\$ 900,000</u>
TOTAL	\$1,800,000

Preliminary Project Description

Project Name: AllCoNet Backbone Upgrade

Applicant: Allegany County Commissioners

County: Allegany

Contact: Beth Thomas

Phone: (301) 777-2438

Project Description:

Allconet provides high speed broadband access to non-profit, government, and educational facilities as well as private business entities ranging from telecommuters and small businesses to health care and light manufacturers. The phase II portion of the AllCoNet microwave link upgrade will double the capacity of and install licensed microware links at critical spur tower sites, resulting in improved reliability and performance. Phase II will also install and provide for operations at the Mount Savage Public Safety Communications Tower in Mount Savage, Maryland.

Without the AllCoNet network, government and educational users alone would incur an estimated \$1,380,000.00 annually in telecommunications charges, facilities would experience a decrease in speed, connectivity for public safety video surveillance would be reduced; high speed broadband residential and business users not served or underserved by commercial providers would lose service. AllCoNet Broadband connectivity currently supports remote radiology; video conferencing, arraignment, surveillance; scada monitoring; public safety land mobile radio, public safety mobile computing; ip telephony; government/education data connectivity, residential internet access as well as primary and redundant data connectivity for business.

Failure to upgrade critical spur tower sites will prevent business and not for profit subscribers from utilizing the increased core capacity achieved in Phase I and would result in loss of services to public, residential and business users; significantly reduce the communication capability of government organizations and limit the ability to leverage ARRA fiber to its fullest potential.

ARC Goals to Be Addressed, Objectives, and Strategy:

ARC Goal 3: Develop and Improve Appalachia's Infrastructure to Make the region Economically Competitive.

State Objective 3.3: Continue the development of modern telecommunications network that includes voice, data and video resources.

State Strategy 3.3.1: Provide the basic infrastructure necessary to develop and maintain a modern broadband network.

Proposed Basic Agency: N/A

Proposed Funding Source: Allegany County	\$150,000
ARC	<u>\$150,000</u>
Total	\$300,000

Preliminary Project Description

Project Name: Last Mile Wireless – Phase III

Applicant: Garrett County Commissioners

County: Garrett

Contact: Frank Shap

Phone: 301-334-1986

Project Description:

Garrett County will continue the design, installation and operations of a wireless network to offer broadband Internet service to as many as 1000 additional residences currently not served by any broadband provider. The system will use the newly released "TV White Space" frequency spectrum that can travel up to 10 miles, and penetrate through buildings, trees, etc. This concept was evaluated in the Garrett County Broadband Feasibility Study, the ARC funded Last Mile Wireless Network Broadband Phase 1 project, and the Phase 2 project to be implemented in Summer/Fall 2014. The multiple deployments (Phases 1, 2, 3) are envisioned to reach as many as 3000 unserved residences when fully operational in 2016.

The Project will build on the design and engineering work done in Phase 1 and 2, being implemented in 2014-2015. Phase 1 is currently being developed to provide service to as many as 500 residences, and will validate the technical, operational and business management strategies. Phase 2 builds on Phase 1, and when awarded (anticipate July 2014) will expand service availability to as many as 1000 additional residents.

The Project will continue to improve on Phase 1 and 2, and refine the technology, design, construction/deployment/operations options, and continue utilizing the One Maryland Broadband Network (OMBN) fiber for "backhaul" connection to the Internet backbone. Sustainability will be factored in to the design and operating financial model to assure a minimum 5 year life span.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 3: Develop and Improve Appalachia's Infrastructure to Make the region Economically Competitive.

State Objective 3.3: Continue the development of modern telecommunications network that includes voice, data and video resources.

State Strategy 3.3.1: Provide the basic infrastructure necessary to develop and maintain a modern broadband network.

Proposed Base Agency: N/A

Proposed Funding Sources:

ARC	\$250,000
State/Private	<u>\$250,000</u>
Total	\$500,000

Preliminary Project Description

Project Name: Automotive Technology Advanced Workforce Development

Applicant: Allegany College of Maryland

County: Allegany

Contact Person(s): David Jones

Phone: 301-784-5350

Project Description:

During the past five years, there have been vast changes in the automotive industry. One of the most pressing needs today is that of a well-trained technician in the use of emerging automotive technology.

The need for hands-on experience is critical in automotive technology. The six items requested will provide students with the required hands-on experience to be prepared for the changing workplace. This equipment will also assist with further certification required of the marketplace as well as job placement. The items requested follow:

- Honing Machine- A stand-alone machine used to hone engine cylinders to factory specifications.
- Road Force Balancer- New technology in tire balancing.
- Carbon Pile Battery Tester- A tester required for modern battery testing.
- Evaporative Emissions Trainer- A stand-alone trainer that mimics a vehicle for student training.
- ABS/TCS Trainer- A stand-alone trainer that mimics a vehicle for student training.
- Genisys Touch Scan Tool – A stand-alone trainer that mimics a vehicle for student training.

This project would allow students to gain expanded diagnostic abilities due to diagnostic routines. Allegany College of Maryland's automotive technology workforce training project would allow for the development of an expanded recruitment program, attracting students on the local and national level and supplying trained technicians for the expanding local and national employment market. In addition, the acquisition of this equipment would bolster the economic outlook of the area by providing training to workers to meet the existing workforce needs as well as training to workers to retain employment and increase job retention. It is expected that approximately 40 students and 25 businesses would directly benefit from this project every year.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 2: Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy

State Objective 2.8: The percentage of Appalachian workers receiving advanced skills training will exceed the national average.

State Strategy 2.8.1: Increase the region's emphasis on science, math, engineering, and vocational programs.

Proposed Base Agency: N/A

Proposed Funding Sources and Amounts:

ARC	\$42,780
Local	<u>\$42,780</u>
TOTAL	\$85,560

Preliminary Project Description

Project Name: Penn Mar Sewer

Applicant: PenMar Development Corporation

County: Washington

Contact: Dori Nipps
100

Phone: 301-241-4050 ext

Project Description:

Fort Ritchie began in 1926 as a brigade training area for the Maryland National Guard. Following a storied history, the U.S. Army acquired the Fort in 1948. In 1995, Fort Ritchie was placed on the Base Realignment and Closure (BRAC) list. The fort ceased operating as a military installation on September 30, 1998, and eventually ownership transferred to the PenMar Development Corporation. The property includes 591 acres of land, multiple on-site commercial and residential buildings, historic stone structures, and aging infrastructure.

The majority of the sewer system on the property is in disrepair, needing replacement in order to accomplish the immediate goals of (1) eliminating exfiltration of untreated sewage generated by current users of the system, and (2) reducing inflow and infiltration to acceptable levels.

A May 4, 2012 engineering report recommended the following work to various sections of that part of the system known as “A-Line”:

- Replacing line and manholes. (This remediation will allow two modern buildings, the former PX and Commissary, to be occupied.)
- Increasing pipe size for 10” to 12”, where appropriate, in order to accommodate future development of the property.
- Installing plugs and abandoning various laterals.
- Relining the system where appropriate.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 3: Develop and improve Appalachia’s infrastructure to make the region economically competitive.

State Objective 3.2: Increase the number of marketable industrial sites within all three counties including the conversion and rehabilitation of vacant industrial facilities.

State Strategy 3.2.1: Provide the basic infrastructure to new industrial sites and rehabilitate vacant industrial facilities.

Proposed Basic Agency: USDA- RD

Proposed Funding Sources:

Penn Mar Developmnet Corp:	\$400,000
ARC:	<u>\$400,000</u>
Total:	\$800,000

Preliminary Project Description

Project Name: Telehealth Initiative to Enhance Community Healthcare

Applicant: Garrett County Memorial Hospital

County: Garrett, Preston, Tucker and Grant

Contact: Lara D. Wilson

Phone: 301-533-4106

Project Description: In 2013, Garrett County Memorial Hospital (GCMH) transferred 540 patients to surrounding hospitals for specialty services that could not be provided here at GCMH, disrupting continuity of care. With the technological advances being made in the world of telehealth, GCMH believes that approximately 25% or 135 of these patients could have been treated here at GCMH if telehealth capabilities were made available. This technology allows physicians the ability to communicate and consult with specialists and experts in the field locally or globally via webcam. Providing this caliber of technology to GCMH physicians allows our patients to get the level of care they require right here in their own community.

A great example of this could be in the treatment of local patients who have suffered from a stroke. Historically, stroke patients have always needed to be transferred out due to the level of testing and care required. With the addition of telehealth, patients will be able to be evaluated and treated right here at GCMH. This would alleviate the long commute and strain on family and friends required by the travel to other larger facilities such as the West Virginia University Health System, especially during the harsh winter months in this area. Depending on the severity of the case, daily or weekly web conferences could be setup between the GCMH physicians, even the patient's own established family physician, and a Stroke Specialist to review the case, discuss appropriate testing required, monitor the medications, assess the treatment plan, etc. This allows GCMH physicians to treat their own patients at a level of excellence that was never before possible while simultaneously providing a more familiar and comfortable environment for the patients in our community.

This project will purchase four telehealth carts that include the equipment necessary for our physicians to easily communicate via telepresence with other leading physicians throughout the medical community. One of these carts will be designated specifically to the diagnosis and treatment of stroke. Additionally, this project will include the installation of video messaging equipment that enables the telehealth carts to securely access the Internet.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 2: Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy.

State Objective 2.1: Increase the capacity of the local telecommunications network for medical facilities

State Strategy 2.1.1: Provide infrastructure to connect Western Maryland medical facilities to other Maryland and regional facilities to provide telehealth and other diagnostic services.

Proposed Basic Agency: N/A

Proposed Funding Sources:

Appalachian Regional Commission	\$ 62,000
Garrett County Memorial Hospital	<u>\$ 62,000</u>
TOTAL	\$124,000

Preliminary Project Description

Project Name: Geochemistry Laboratory

Applicant: Frostburg State University

County: Allegany

Contact: Phillip Allen & Robert Larivee
301 687-4091

Phone: 301 687 4891 and

Project Description:

FSU is requesting funds to establish a geochemistry laboratory facility to train students in the applied science of geochemistry. The facility would be the foundation of new academic courses and a departmental focus that the Earth Science program is currently developing. Once established, the Earth Science program will fulfill the objective of training circa 20 students annually in the geochemical techniques of soil, water, mineral, inorganic and organic sediment analysis. Natural gas extraction is truly an emerging technology that will evolve and change quickly, and understanding the influence it will have on our region will require specialized training. This program is designed to address the shortage of skilled well-trained individuals available to work in this emerging field. In addition a geochemistry laboratory will assist the continued development of the Earth Science program to proactively meet the future needs of the projected 35% increase in geoscience jobs over the next 10 years (American Geosciences Institute, 2014, Slide 5 *Outcomes of the Geoscience Undergraduate Education Summit* <http://www.americangeosciences.org/workforce/aguagi-heads-and-chairs-webinars>).

The proposed Geochemistry Laboratory will be a state-of-the-art training facility in geochemical techniques. This 20-seat facility will help attract and retain quality students into our programs and will give them the opportunity to take laboratory courses associated with geology, soils/water analysis and geochemistry, all of which are applicable to natural resource extraction via fracking and associated activity. This laboratory facility will provide our students with an industry standard experiential training program that is required to make the difference in meeting the energy needs of the future, while safeguarding our environment, and making our students exceptionally competitive in the geoscience community.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 2: Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy

State Objective 2.8: The percentage of Appalachian workers receiving advanced skills training will exceed the national average.

State Strategy 2.8.1: Increase the region's emphasis on science, math, engineering, and vocational programs.

Proposed Base Agency: N/A

Proposed Funding Sources

ARC	\$100,000
FSU	<u>\$100,000</u>
TOTAL	\$200,000

Preliminary Project Description

Project Name: Allied Health Program Expansion

Applicant: Garrett College

County: Garrett

Contact: Julie Yoder

Phone: (301) 387-3101

Project Description:

The Career Technology Training Center (CTTC) has become the hub of workforce development for Garrett College and Garrett County. Short-term, workforce training, resulting in industry recognized certifications, enables individuals to quickly enter, or re-enter the workforce. The CTTC is a former manufacturing facility which was renovated in two phases, resulting in four state-of-the-art classrooms, a welding lab, an electronics/automation lab, a small CNC machining lab, and a large flexible trades space. This project will enable the completion of the final phase of renovation: creation of an Allied Health laboratory. The Allied Health laboratory will facilitate training in the areas of Emergency Medical Services, Certified Nursing Assistant, Phlebotomy, Health Informatics, and other short-term trainings to be offered on a cyclical basis or on demand. Garrett County's census indicates an aging population; the demand for individuals trained to provide direct patient care will be critical in the near future. This project will include renovations, as well as the purchase of technology, curriculum and equipment.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 2: Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy

State Objective 2.8: The percentage of Appalachian workers receiving advanced skills training will exceed the national average.

State Strategy 2.8.1: Increase the region's emphasis on science, math, engineering, and vocational programs.

Proposed Basic Agency: N/A

Proposed Funding Sources:

Garrett College:	\$110,000
ARC:	<u>\$110,000</u>
Total Project:	\$220,000

Preliminary Project Description

Project Name: Grantsville Grows Greener Strategic Plan

Applicant: Town of Grantsville

County: Garrett

Contact: Paul Edwards

Phone: 301-895-3144

Project Description:

The northern end of the Town of Grantsville's is the current home of two agricultural ventures: Southern States and Green Valley Foods, but historically was home to many others, including the famous Yoder's Locker Plant. One new agricultural business, a cow's milk creamery, is in the process of locating there. Several other private businesses in the agricultural industry have recently expressed strong interest in locating in northern Grantsville as well: a goat's milk creamery, a butcher shop, a distillery, a new dairy, an agritourism venture, a farm museum, a food hub, and others. These new and expanding businesses, if in place in the right way, could boost jobs, tax revenue, tourism, and be an economic boost to this small town's economy.

This Project: The Town of Grantsville needs help in planning this section of town in a sustainable way that will maximize benefits and minimize risks. This project will hire a consultant to develop a strategic plan for what is being called the "Agriculture Village", to include feasibility, facility location planning, streetscape planning, traffic/freight planning, recruiting potential complementary businesses, etc.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 2: Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy

State Objective 2.2: Enhance the capacity of local municipalities to plan for economic development and the needs of Western Maryland citizens.

State Strategy 2.2.2: Develop and maintain economic development plans.

Proposed Basic Agency: N/A

Proposed Funding Sources:

Local:	\$ 50,000
ARC:	<u>\$ 50,000</u>
Total	\$100,000

Preliminary Project Description

Project Name: Fiber Extension – Humbird and Cash Valley

Applicant: AC Board of Education

County: Allegany

Contact: Nil Grove

Phone: 301-759-2070

Project Description:

Project will fund the expansion to two Allegany County Board of Education Elementary schools where the NTIA/BTOP State Fiber Grant did not provide; John Humbird and Cash Valley. Both schools will then have increased broadband access leveraging and extending the ARRA Maryland Broadband Grant. The ARC was instrumental in providing a Broadband Feasibility Study for Allegany County under ARC approved grant ARC-MD-17135 from which the pricing and engineering preliminary work was accomplished for all schools not funded via the State BTOP grant. This new fiber broadband will ensure Appalachian residents have access to the needed 21st Century skills to compete in a world economy and help maximize the ARRA “One Maryland Broadband Network” award by leveraging as well as complementing the Allconet network.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 2: Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy.

State Objective 2.5: Enhance and strengthen the communication capability of non-profit and government organizations.

State Strategy 2.5.1: Develop and maintain a modern telecommunications network.

Proposed Basic Agency: N/A

Proposed Funding Sources:

Appalachian Regional Commission	\$150,000
ACPS	<u>\$150,000</u>
Total	\$300,000

Preliminary Project Description

Project Name: Mountain Laurel Medical Center

Applicant: Mountain Laurel Medical Center

County(s): Garrett

Contact Person: Beth Little-Terry

Phone #: 301-533-3300

Project Description:

Mountain Laurel Medical Center (MLMC) located in Oakland is opening a satellite office in Grantsville at the request of the community, meeting an unmet need in that community. To be prepared at that site, MLMC will need to develop the infrastructure for telecommunications between sites in Oakland and Grantsville to support the unified sharing of the electronic health record. In addition, MLMC will need to ensure fiber optic connectivity that will allow for implementation of telehealth and other diagnostic services as well as connectivity to other medical facilities specifically regional and local hospitals. MLMC will need to purchase hardware and peripherals including phone system and installation expenses that will allow MLMC to connect to the existing fiber optic available in Grantsville. In addition purchase platforms for the installation of a patient portal allowing patients direct access to health information, population management and reporting tools to measure and demonstrate quality and access.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 2: Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy.

State Objective 2.1: Increase the capacity of the local telecommunications network for medical facilities

State Strategy 2.1.1: Provide infrastructure to connect Western Maryland medical facilities to other Maryland and regional facilities to provide telehealth and other diagnostic services.

Proposed Basic Agency: N/A

Proposed Funding Sources and Amounts:

Private Donor	\$100,000
ARC:	<u>\$100,000</u>
Total	\$200,000

Preliminary Project Description

Project Name: Hagerstown Wastewater Collection System

Applicant: City of Hagerstown

County: Washington

Contact: Alex Rohrbaugh
137

Phone: 301-739-8577 ext.

Project Description:

This is a multi-phase project to correct inflow and infiltration (I&I) from entering the City of Hagerstown's Wastewater Collection System. Removal of I&I is a critical aspect of our efforts to improve the capacity of the City's Wastewater Treatment Plant, because expansion efforts are limited by the State of Maryland's wastewater treatment plant National Pollutants Discharge Elimination System (NPDES) Permits. As a result of these I&I correction activities, the City will gain additional capacity at the wastewater plant which in turn will allow us to accommodate new growth and economic development opportunities in our community. In addition, these activities provide environmental benefits to the Chesapeake Bay Watershed and local tributaries by assisting in the reduction of the threat of wastewater overflows from the City of Hagerstown's Collection System and Wastewater Treatment Plant. Project CO327 requested funding \$900,000 for FY16.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 3: Develop and improve Appalachia's infrastructure to make the region economically competitive.

State Objective 3.2: Increase the number of marketable industrial sites within all three counties including the conversion and rehabilitation of vacant industrial facilities.

State Strategy 3.2.1: Provide the basic infrastructure to new industrial sites and rehabilitate vacant industrial facilities.

Proposed Base Agency: EDA

Proposed Funding Sources:

ARC	\$350,000
City of Hagerstown	<u>\$550,000</u>
Total	\$900,000

Preliminary Project Description

Project Name: Boonsboro I&I – Phase I

Applicant: Town of Boonsboro

County: Washington

Contact: Meagan Clark

Phone: 301-432-5141

Project Description:

The Town of Boonsboro recently replaced its sewage treatment system with a state-of-the-art, bio-enhanced nutrient reduction wastewater treatment plant. The Town is now able to determine the amount of flow into the system and has concluded a large amount of stormwater is infiltrating the system (known as I&I) and going through an unnecessary, costly treatment process at the new wastewater treatment plant.

In order to alleviate and correct the I&I, the Town of Boonsboro has developed a plan to be completed in several phases. Phase 1 of the I&I Plan consists of conducting an assessment and analysis of the Town’s sewer infrastructure that will identify areas of inflow and infiltration and recommend methods for repair. The analysis will prioritize repair areas into two categories; major and minor, that will be used to determine implementation of further phases. Phase I of the program also includes repairing areas identified in the analysis as a major priority.

Phases 2 and 3 of the I&I program will continue repair of areas identified as a major priority and minor priorities, depending on the results of the study and funding availability.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 3: Develop and improve Appalachia’s infrastructure to make the region economically competitive.

State Objective 3.7: Build and Enhance Basic Infrastructure

State Strategy 3.7.1: Leverage funding to support the development of traditional infrastructure including water and sewer.

Proposed Basic Agency: USDA-RD

Proposed Funding Sources:

Town of Boonsboro	\$100,000
ARC	<u>\$100,000</u>
Total Cost	\$200,000

Preliminary Project Description

Project Name: Engineering Lab Improvement

Applicant: Frostburg State University

County: Allegany

Contact: Mohammed Eltayeb

Phone: (240)-920-9257

Project Description:

In recent accreditation visits by the Accreditation Board for Engineering and Technology (ABET), program evaluators encouraged FSU to seek ways to update and upgrade the engineering labs. Specific mention was made about the need to upgrade facilities for the Electronics and Instrumentation courses. While students are completing the lab in traditional ways, modern instruments for conducting data acquisition experiments are lacking. Within the electrical engineering concentration several essential courses cannot be offered due to the lack of lab equipment. The last significant equipment acquisition for the engineering labs was made over ten years ago. Modern instruments are quite essential and vital to the success of our students in the current competitive job market.

In this project we intend to acquire modern and advanced tools and equipment to enhance the learning outcomes of our students in the various engineering concentration. We expect that lab improvement will provide lucrative results as far as recruitment and retention in our programs as well as an enhanced overall performance. Many of our graduates start their professional careers in the western region of the state of Maryland. The high quality of our programs contributes directly to the economic development of the region.

In this project we intend to improve the Capstone Design Lab, Electronics and Instrumentation Lab, and Wireless and Computing Lab, and the Energy Conversion and Mechatronics lab in the department of Physics and Engineering at Frostburg State University. Improvements in these labs will help us meet ABET standards. Modern equipment, apparatus, materials, systems and software will be purchased by the funds provided, allowing our graduates receive advanced training in their fields of study. It will also prepare us to begin offering a new concentration in renewable energy within the general engineering program.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 1: Increase job opportunities and per capita income in Appalachia to reach parity with the nation.

State Objective 1.2: Stimulate growth of the region's businesses through development of technology resources.

State Strategy 1.2.1: Develop educational programs that support new technology development in the region.

Proposed Basic Agency: N/A

Proposed Funding Sources:

ARC	\$100,000
Frostburg State University	<u>\$100,000</u>
Total	\$200,000

Preliminary Project Description

Project Name: Electro-Mechanical Engineering Program

Applicant: Board of County Commissioners

County: Washington

Contact Person(s): Anne Shepard

Phone: 240-500-2557

Project Description:

Electro-mechanical technicians combine knowledge of mechanical technology with knowledge of electrical and electronic circuits. They install, troubleshoot, repair, and upgrade electronic and computer-controlled mechanical systems, such as robotic assembly machines. They make very good starting salaries that are comparable to starting wages for junior engineers. Electro-mechanical engineering technology personnel are critical to automated manufacturing operations that are expanding rapidly as robotics technology is broadly applied to reduce the assembly-line-driven workforce and make it possible to keep plants running 24-7. As with other science, technology, engineering, and math fields, the roles played by of electro-mechanical engineers is expected to continue to grow.

As HCC looks to a future in which the manufacturing jobs of today are rapidly becoming the jobs of yesterday and more automation is being used rather than assembly- and line-driven work, adding new courses and an electro-mechanical engineering program is necessary to help workers train (or re-train, if they have been employed in jobs that will soon no longer exist) for jobs that will continue to be in demand in future years. The work proposed for the new program will build upon work HCC has already done to establish a mechanical engineering technology program and digital instrumentation/process controls program. The College's goal will be to ensure that the electro-mechanical engineering program is started and that students are recruited and complete the program successfully, moving on to serve as exemplary employees. By preparing a more qualified workforce, the program will assist with economic development efforts, many of which are centered on helping our region make the transition from a manufacturing-based economy that relies on jobs that are rapidly becoming obsolete, to an economy that is more diverse and benefits from jobs that will grow into the future. Automation will become more and more the norm for all manufacturing work. Companies such as Volvo, Cinetic Landis, and others have growing workforce needs in this area.

ARC Goal 2: Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy

State Objective 2.9: All Appalachian counties will equal or exceed the national average for enrollment in post-secondary education.

State Strategy 2.9.1: Increase the region's employment opportunities by providing an emphasis on technology based education and programs related to math and science.

Proposed Base Agency: N/A

Proposed Funding Sources and Amounts:

ARC	\$ 50,000
HCC	<u>\$ 50,000</u>
TOTAL	\$100,000

Preliminary Project Description

Project Name: Capital Equipment Project

Applicant: Friends Aware Inc.

County(s): Allegany

Contact: Kathleen Breighner
146

Phone: 301-722-7268 ext.

Project Description:

Friends Aware Inc. seeks funds to complete the capital equipment project for the expanded and renovated Life Enrichment Center. The centers building project will provide an additional 10,266 square feet of space and 22,000 sq. feet of renovated space. Friends Aware Inc. is located at 1601 Holland Street, Cumberland, Maryland. The Holland Street location provides supported employment services, vocational training and day habilitation for 140 developmentally disabled individuals of Allegany County.

Friends Aware is asking for ARC funds to provide needed capital equipment including: commercial shredding machines; vending machines; oven for shrink wrap and materials; furniture; office, training, and computer equipment; specialized lifts and equipment to provide accessibility for impaired individuals.

This project will purchase equipment to train and employ individuals with developmental disabilities and their direct care staff on site and in the community, creating and increasing employment opportunities in Allegany County.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 1: Increase Job Opportunities and per Capita Income in Appalachia to Reach Parity with the Nation.

State Objective 1.6: Continue to support business expansions, start-ups and entrepreneurship.

State Strategy 1.6.3: Support programs that do not duplicate existing services but that fill gaps in the existing entrepreneur network.

Proposed Basic Agency: N/A

Proposed Funding Sources:

ARC:	\$150,000
Friends Aware Inc.:	<u>\$150,000</u>
Total:	\$300,000

Preliminary Project Description

Project Name: Replacement of Hancock Branch

Applicant: Washington County Free Library

County: Washington

Contact: David Hanlin

Phone: 301-739-3250 ext. 1168

Project Description:

This project is to construct a new replacement library for the Hancock branch of the Washington County Free Library. The existing branch library is sited in the Widmyer Park. Engineering studies have been conducted on Widmyer Park and one other location. The Board of Trustees of the Washington County Free Library has determined that the best site for the replacement building is at a site near the existing location, albeit out of the flood plain, in Widmyer Park, Town of Hancock.

The new library will be 8,000 sf. It will provide state of the art capabilities, including office space, meeting rooms, free internet access, book shelves, and display space. By building a new branch library, the community of Hancock will benefit from improved community facilities. Heretofore, because of contamination, the inventory of materials at the Hancock branch library has been limited and self-contained. Providing a new facility will allow WCFL to extend its entire collection to Hancock, much to the benefit of the citizenry. WCFL expects to realize increased circulation, but also registered patrons from the Hancock area.

The Town of Hancock has agreed to endorse this project.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 1: Increase job opportunities and per capita income in Appalachia to reach parity with the nation.

State Objective 1.2: Stimulate growth of the region's businesses through development of technology resources.

State Strategy 1.2.1: Develop educational programs that support new technology development in the region.

Proposed Base Agency: USDA

Proposed Funding Sources:

Governor's FY2014 Capital Budget (awarded)	\$1,500,000
State of Maryland library capital pool (awarded)	\$ 200,000
Endowment, Washington County Free Library	\$ 425,000
Appalachian Regional Commission Grant Request	<u>\$ 350,000</u>
Total	\$2,475,000

Preliminary Project Description

Project Name: Allegany Animal Shelter Construction

Applicant: Allegany Co. Animal Shelter Foundation

County (s): Allegany

Contact: Tina Rafferty, Executive Director
5930

Phone: (301)777-

Project Description:

The Allegany County Shelter Management Foundation proposes to construct a new shelter on land donated by the Allegany County Board of Commissioners that previously served as the County Farm.

The construction of the 11,000 sq/ft facility will provide a hygienic, modern space for adoptable pets and relief from the over-crowded, inefficient space that is currently serving as the animal shelter. The new, energy efficient facility will allow for on-site medical treatment for sick and injured animals and provide a hands on training facility for individuals working towards a Veterinary Tech certificate at Allegany College of Maryland or a career in veterinary science at Frostburg State University, the University of Maryland, and West Virginia University. The facility would serve as the only training facility in Allegany County open to students. The community room would also provide space for local elementary, middle, and high school students to explore veterinary science career options through sites visits, educational programming, volunteer opportunities, and career mentoring. The new facility will create a minimum of five (5) new permanent full-time jobs and will serve as a training ground for future veterinary technicians, assistants, and veterinarians, increasing the capacity of the local region and creating livable wage employment opportunities.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 1: Increase Job Opportunities and per Capita Income in Appalachia to Reach Parity with the Nation

State Objective 1.6: Continue to support business expansions, start-ups and entrepreneurship.

State Strategy 1.6.3: Support programs that do not duplicate existing services but that fill gaps in the existing entrepreneur network.

Proposed Basic Agency: HUD

Proposed Funding Sources:

ARC	\$ 250,000
State and Local	\$ 100,000
Other (CDBG)	\$ 15,000
Other (Private)	<u>\$ 250,000</u>
Total	\$ 615,000

Preliminary Project Description

Project Name: AllCoNet White Space Radio Pilot

Applicant: Allegany County Commissioners

County: Allegany

Contact: Beth Thomas

Phone: (301) 777-2438

Project Description:

The project will utilize the “TV White Space” frequency spectrum to reach residences currently not served by any broadband provider. Allegany County recognizes that broadband is an essential, critical infrastructure for our economic growth. This pilot will assist in our understanding and expansion of broadband resources to make wireless connectivity possible in areas previously difficult or prohibitively expensive to reach. A new opportunity for our rural communities to connect with high-speed internet, it expands the capability of businesses to operate and government to extend communications for data monitoring and control for utilities and public safety applications.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 3: Develop and Improve Appalachia’s Infrastructure to Make the region Economically Competitive.

State Objective 3.3: Continue the development of modern telecommunications network that includes voice, data and video resources.

State Strategy 3.3.1: Provide the basic infrastructure necessary to develop and maintain a modern broadband network.

Proposed Basic Agency: N/A

Proposed Funding Sources:

Allegany County	\$ 50,000
Appalachian Regional Commission	<u>\$ 50,000</u>
Total	\$100,000

Preliminary Project Description

Project Name: Wireless in the Parks

Applicant: City of Hagerstown

County: Washington

Contact: Alex Rohrbaugh

Phone: 301-739-8577 x137

Project Description:

The project provides free wireless Internet access to City Park, Fairgrounds Park, and Pangborn Park for all park visitors. The proximity to existing fiber optic cable infrastructure makes these parks the most economical choices for an initial rollout. The design would be similar to that being employed by the City Center Wireless project created jointly by University System of Maryland Hagerstown (USMH), Hagerstown-Washington County Industrial Foundation, Inc. (CHIEF), and the City of Hagerstown. The project expands the opportunity for visitors to attend one of these parks and have connectivity for work or leisure while family enjoys the other amenities of the park.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 3: Develop and Improve Appalachia’s Infrastructure to Make the region Economically Competitive.

State Objective 3.3: Continue the development of modern telecommunications network that includes voice, data and video resources.

State Strategy 3.3.1: Provide the basic infrastructure necessary to develop and maintain a modern broadband network.

Proposed Basic Agency: N/A

Proposed Funding Sources:

ARC:	\$15,000
Private	\$ 5,000
City of Hagerstown:	<u>\$10,000</u>
Total:	\$30,000

Preliminary Project Description

Project Name: Middle School Network Switch Equipment

Applicant: Board of Education of Allegany County

County: Allegany

Contact: Nil Grove

Phone: 301-759-2070

Project Description:

Project will fund the replacement of aging network switch equipment in our 4 middle schools. Original equipment was purchased in 2007 and has come to the end of its useful life and warranty agreements. Network switching equipment is integral to school infrastructure, physically connecting devices together, and securely controlling the operation of all data, voice, and video information. Switches manage the flow of data across a network by only transmitting a received message to the device for which the message was intended using required media access control addresses (MAC) which then secures that transmission. With the addition of this equipment update, the board of education will ensure Appalachian Infrastructure to make the region economically competitive and continue the development of a modern communications network which includes voice, data and video resources, extending the broadband network from outside of the building into the classroom.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 3: Develop and Improve Appalachia's Infrastructure to Make the region Economically Competitive.

State Objective 3.3: Continue the development of modern telecommunications network that includes voice, data and video resources.

State Strategy 3.3.1: Provide the basic infrastructure necessary to develop and maintain a modern broadband network.

Proposed Basic Agency: N/A

Proposed Funding Sources:

ARC:	\$ 75,000
ACPS:	<u>\$ 75,000</u>
Total:	\$150,000

Preliminary Project Description

Project Name: STEM Pavilion and Restroom

Applicant: Evergreen Heritage Center (EHC) Foundation

County: Allegany

Contact: Janice Keene

Phone: 301-687-0664

Project Description:

This collaborative STEM Pavilion and Restroom Project will create an outdoor STEM classroom that will support:

- STEM field trips by the hundreds of students that visit the Evergreen Heritage Center each year, ranging in age from Head Start (3 to 5 years old) through college.
- Education and job training in sustainable agriculture and forestry for young people and adults as part of experiential learning programs that use the EHC Heritage Hoop House (high tunnel greenhouse) and Heritage Wood Shop, both recently constructed adjacent to the Pavilion site.

The 20' by 40' Pavilion will include a large demonstration and activity area, a self-contained composting restroom, a storage closet for supplies, lighting and restroom ventilation powered by solar energy, and collection of rain water for field use. The Pavilion's timber frame construction will use EHC logs processed at the EHC Heritage Wood Shop during ACM and FSU forest technology programs. During the Project, ACPS elementary, middle, and high school students will learn how to use locally harvested trees to create useful wood products, apply renewable energy solutions, collect and repurpose rain water, and compost waste. ACM forest technology interns will assist in the construction of the Pavilion, and FSU interns will document the Project's use of sustainability best practices to create Project learning and promotional materials. Project tasks include designing and building the pavilion and restroom, preparing STEM lessons for the students who will participate in the Project and utilize the facility thereafter, conducting the lessons as the pavilion is built, and hosting a public workshop at the end of the Project to showcase the facility and share lessons learned. The Project team includes school teachers, college professors, EHC instructors, students, volunteers, and contractors.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 1: Increase job opportunities and per capita income in Appalachia to reach parity with the nation.

State Objective 1.2: Stimulate growth of the region's businesses through development of technology resources.

State Strategy 1.2.2: Work with the region's higher education institutions to develop new programs that support new technology.

Proposed Basic Agency: N/A

Proposed Funding Sources:

ARC	\$ 50,000
Evergreen	<u>\$ 50,000</u>
Total	\$100,000

Preliminary Project Description

Project Name: Feasibility Study for a Physician’s Assistant Program

Applicant: Frostburg State University

County: Allegany

Contact: Joseph Hoffman

Phone: 301 687-4120

Project Description:

In early 2013, a group of local health care professionals and state-wide health officials contacted FSU to urge the University to consider developing a Physician’s Assistant program. They noted that the health care environment is rapidly changing given the implementation of the Affordable Health Care Act and the increase in managed health care, which is expected to result in an increased demand for physicians and mid-level health care providers. Our nation’s capacity to produce the required number of physicians is inadequate. This constraint, coupled with the need to be more efficient and effective in providing health care, has resulted in the need for an ever increasing number of mid-level health care providers, especially in rural regions. In fact, Allegany County and surrounding areas in Appalachia have been designated as health care professional shortage areas.

FSU proposes to conduct a feasibility study for the development of a physician’s assistant program. A consultant would be hired to examine need for such a program in the region, as well as the facilities and staffing resources that would be required.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 2: Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy

State Objective 2.8: The percentage of Appalachian workers receiving advanced skills training will equal or exceed the national average.

State Strategy 2.8.2: Development of new educational programs that will lead to the development of the new skills necessary in the 21st century including continuing education programs.

Proposed Basic Agency: N/A

Proposed Funding Sources:

ARC	\$20,000
FSU	<u>\$20,000</u>
Total	\$40,000

Preliminary Project Description

Project Name: Food Science Laboratory

Applicant: Frostburg State University

County(s): Allegany

Contact: Robert Larivee

Phone #: 301 687-4091

Project Description:

There is a growing concern in our nation with the rapid increase in obesity and other health problems associated with poor nutrition. This trend is much more pronounced among individuals with lower income and fewer educational opportunities as found in rural areas. Poor nutrition not only leads to health problems but academic ones as well; it takes a healthy body to produce a healthy mind.

FSU is requesting funds to establish a nutrition/dietetics laboratory facility to train students in the science of food and nutrition. The facility would be utilized as part of a new minor program in Nutrition/Dietetics that is under development. This program will eventually become a major, with the objective of producing 20 nutritionists/dieticians per year that will choose to work in rural areas. Modern nutrition truly is an emerging technology requiring specialized training. It is well established there is a shortage of individuals trained to provide professional care in nutrition and healthy eating, especially in rural areas. This program is designed to address that need.

The proposed Food Science Laboratory will be a state-of-the-art training facility in nutrition and food science. This 24-seat facility will help attract quality students into our program and will give them the opportunity of taking laboratory courses associated with nutrition, food science and food preparation. They will have the hands-on experiential training required to make the difference in providing quality care.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 2: Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy

State Objective 2.8: The percentage of Appalachian workers receiving advanced skills training will equal or exceed the national average.

State Strategy 2.8.2: Development of new educational programs that will lead to the development of the new skills necessary in the 21st century including continuing education programs.

Proposed Base Agency: N/A

Proposed Funding Sources:

ARC:	\$ 80,000
FSU:	<u>\$ 80,000</u>
Total	\$160,000

Preliminary Project Description

Project Name: Biomedical Instrumentation

Applicant: Frostburg State University

County: Allegany

Contact: Peggy Biser

Phone: 301-687-3193

Project Description:

The health care environment is rapidly changing, and it is expected that there will be an increased need for qualified workers to fill various health care related jobs. Technological advances have equipped us with some very useful tools for performing biomedical research as well as for performing routine diagnostic medical tests. Health care workers need to have experience with the tools and technology used in the medical setting. FSU is seeking funds for the purchase of instrumentation and supplies commonly used when performing biomedical research and diagnostic testing. This instrumentation will provide undergraduate students with experience sought by pharmaceutical companies, hospitals, and national research labs. It will also provide undergraduate students the opportunity to complete biomedical research projects. These research projects will provide students with experience desirable to graduate and professional degree programs, thereby preparing students for success in these tracks.

FSU is currently developing a health sciences program to fill the need for individuals prepared for health-focused careers in the Appalachian region. The purchase of relevant biomedical instrumentation would provide students in the health sciences program with valuable experience, thereby enhancing the program. The instrumentation purchased will allow students to study many different health relevant problems, including diseases, the effects of toxic exposure to environmental compounds, or the effects of pharmaceutical compounds.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 2: Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy

State Objective 2.8: The percentage of Appalachian workers receiving advanced skills training will equal or exceed the national average.

State Strategy 2.8.2: Development of new educational programs that will lead to the development of the new skills necessary in the 21st century including continuing education programs.

Proposed Base Agency: N/A

Proposed Funding Sources:

FSU	\$100,000
ARC	<u>\$100,000</u>
Total	\$200,000

Preliminary Project Description

Project Name: Willson Kwok, Ph.D. M.B.A. P.A.

Applicant: Frostburg State University

County: Allegany

Contact: Willson Kwok, Ph.D. M.B.A. P.A.

Phone: 301-687-4170

Project Description:

My research group at Frostburg State University currently collaborates with a biomedical device start-up company MxBiodevices in the development of Dermagrid™, an engineered physical bioscaffold to guide dermal wound healing. It is injected under the wound bed providing a physical scaffold for the patient's own cells to initiate wound healing. Dermagrid™ is synthesized by copolymerizing a high molecular weight carbohydrate and denatured monomeric collagen to form a synthetic open matrix for cell infiltration, attachment and differentiation. Cells recognize this structure as a "wound environment" and initiate the natural wound-healing cascade.

The main purpose of this preliminary project is to synthesize various chemical compositions of Dermagrid™ and to determine the biological performances of these compounds. Cell viability and cell aggregation are two measures that have proven to be good indicators for the success of biomedical devices; hence, biological performances will be evaluated based on these two measures.

The second purpose of this project is to design research methods to quantitatively analyze the aforementioned measurements. The current methodologies depend on users in manually counting cells of interests in estimating the two measurements; thus, they are semi-quantitative and may be prone to user errors. Hence, we aim to develop colorimetric measurement methods in better examining the biological performances of the various chemical compositions of Dermagrid™ created from this project.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 1: Increase job opportunities and per capita income in Appalachia to reach parity with the nation.

State Objective 1.2: Stimulate growth of the region's businesses through development of technology resources.

State Strategy 1.2.2: Work with the region's higher education institutions to develop new programs that support new technology.

Proposed Basic Agency: N/A

Proposed Funding Sources:

FSU:	\$ 7,200
Appalachian Regional Commission:	<u>\$ 7,200</u>
Total Project:	\$14,400

Preliminary Project Description

Project Name: Crayton Boulevard Extension

Applicant: Washington County Commissioners

County: Washington

Contact: Robert Slocum

Phone: 240-313-2418

Project Description:

This roadway project involves construction of a three-lane closed section roadway (one lane in each direction with a continuous center left turn lane and concrete sidewalk on one side) from Crayton Boulevard to two proposed developments off of Showalter Road. The project includes construction of approximately 1,620 linear feet of roadway that will connect to future commercial developments and business parks. The length of roadway needed to connect the remaining segment of Crayton Boulevard to Showalter Road is approximately 500 linear feet and includes a proposed roundabout. This remaining segment and roundabout would be constructed by the developers. Crayton Boulevard Extension is a much needed connection between Maugans Avenue and Showalter Road to provide an additional service route to the Hagerstown Regional Airport that can be accessed via Maugans Avenue from Exit 9 off of Interstate I-81 or MD Route 11. The connection has been identified by Washington County as an essential link for the economic development of new businesses along each side of the roadway.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 4: Build the Appalachian Development Highway System to Reduce Appalachia's Isolation

State Objective 4.3: Provide required access to key industrial or commercial centers.

State Strategy 4.3.1: Transportation investments that will create or maintain employment opportunities in the region, such as projects that create access to an industrial park or area, strengthen city business district access, or upgrade multi-modal access to or from transportation facilities.

Proposed Base Agency: MD State Highway Administration

Proposed Funding Sources:

ARC Access Road	<u>\$1,000,000</u>
Total	\$1,000,000

Preliminary Project Description

Project Name: North Branch Industrial Park Access Road Rehab

Applicant: Allegany County

County: Allegany

Contact: David K. Nedved

Phone: 301-777-5967

Project Description:

Funding is being requested for the rehabilitation and resurfacing of the loop road that traverses and provides access to the North Branch Industrial Park in Allegany County, Maryland. The total project consists of approximately 2.75 miles of road surface and will improve the access for current employers as well as provide increased value to the remaining undeveloped properties in the industrial park. The North Branch Industrial Park currently houses some of the counties major employers including: Hunter Douglas, Berry Plastics, Schroeder Industries, and the FEMA East Coast Logistics Center. There are approximately 1,500 + employees that commute to work daily via this access to the industrial park.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 4: Build the Appalachian Development Highway System to Reduce Appalachia’s Isolation

State Objective 4.3: Provide required access to key industrial or commercial centers.

State Strategy 4.3.1: Transportation investments that will create or maintain employment opportunities in the region, such as projects that create access to an industrial park or area, strengthen city business district access, or upgrade multi- modal access to or from transportation facilities.

Proposed Base Agency: MD State Highway Administration

Proposed Funding Sources:

ARC Access Road	<u>\$700,000</u>
Total	\$700,000

Preliminary Project Description

Project Name: Shafer Park Drive Extension

Applicant: Town of Boonsboro

County: Washington

Contact: Megan Clark, Town Manager

Phone: 301-432-5141

Project Description:

Shafer Memorial Park, situated in the center of the Town of Boonsboro, serves as a community focal point that hosts major public events such as Boonesborough Days and Green Fest, as well as serves the Town of Boonsboro and southern Washington County’s recreational needs. The Town has a master plan of the park that includes expanding the recreational facilities to ensure the greater communities’ needs are met, in addition to stimulating the Boonsboro economy through development.

Shafer Memorial Park currently has two entrances and two park areas that are not connected to one another. The main entrance off Main Street leads to the Community Center; baseball field, park pavilions and playground equipment. The second entrance to the park, off Potomac Street, leads to practice fields and a DNR stocked fishing pond and proposed development that includes an aquatic/community facility, dog park, walking trails, and additional practice fields and playground areas. The park’s master plan also includes a road, known as Shafer Park Drive that is approximately 400 feet in length that would link together the two park areas.

The Town of Boonsboro is requesting ARC Grant funding of the Shafer Park Drive Extension in order to make the connection of the facilities, forming one community park, and providing an additional means of access to the downtown business district.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 4: Build the Appalachian Development Highway System to Reduce Appalachia’s Isolation

State Objective 4.1: Develop a balanced transportation system, which is supportive of economic growth and investment potential in the region.

State Strategy 4.1.2: Improve secondary and local access highways and roads that will support primary highway development and yield an integrated network of road transit in the region.

Proposed Base Agency: MD State Highway Administration

Proposed Funding Sources:

ARC Access Road	<u>\$660,000</u>
Total	\$660,000

Preliminary Project Description

Project Name: Mechanic Street Rehab

Applicant: City of Cumberland

County: Allegany

Contact: Raquel J. Ketterman

Phone: 301-759-6604

Project Description:

This project will improve vehicular access to and from the Central Business District of the City and the Great Allegheny Passage starting point and C&O Canal terminus via North/South Mechanic Street in the direction to and from Interstate 68 (exits 43B & 43C).

The project involves a mill, overlay and paving from Harrison Street north to Bedford Street. This area of Mechanic Street is in need of rehabilitation of the paved surface to continue to safely and smoothly move vehicles in and out of the Central Business District. The project will include lane markings and upgrades to ADA ramps where required.

State funding is being sought for additional work under a complementary project at the Baltimore Street/Mechanic Street intersection that would include the ADA ramps at Baltimore Street, paving and marking of the intersection and crosswalk marking.

ARC Goals to Be Addressed, Objectives, and Strategy

ARC Goal 4: Build the Appalachian Development Highway System to Reduce Appalachia's Isolation

State Objective 4.1: Develop a balanced transportation system, which is supportive of economic growth and investment potential in the region.

State Strategy 4.1.2: Improve secondary and local access highways and roads that will support primary highway development and yield an integrated network of road transit in the region.

Proposed Base Agency: MD State Highway Administration

Proposed Funding Sources:

ARC Access Road	<u>\$640,000</u>
Total	\$640,000

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

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

Complete performance measures of the projects in the region are categorized on the annual GPRA form that is submitted to EDA at the end of the 3rd quarter of the calendar year.

I. Executive Summary

A. Introduction

Appalachian Maryland is not that different from the majority of Appalachia. Like any rural area we are full of tight knit communities and a quality of life that cannot be matched for many of us. The majority of the landscape is full of natural beauty made up of endless forests and countless streams which draw people from around the region.

The region was once a leading area of manufacturing for the state and to this day continues to thrive on its manufacturing base. Companies have long recognized the area for its skilled labor, reliable workforce and educational institutions. More recently the area has diversified as large scale industry has changed strategies to smaller more regional based facilities. Advanced manufacturing which is considered a



blend of traditional manufacturing and technology now plays a very important role in the region. As technology continues to improve the industrial processes the manufactures that call Western Maryland home have adapted and become more efficient. New companies moving into the area are considerably more driven by aspects of technology that allow them to compete in a global economy.

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

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

but also identify legislative initiative that would contribute to the growth and sustainability of Western Maryland.

At the heart of the region lies Frostburg State University (FSU), the only State University in Appalachian Maryland. Within each of the three counties are community colleges which work directly with Frostburg State as well as the local



Boards of Education. The focus at all levels of education is academic excellence and the interest of growing our own workforce by fostering entrepreneurship. Additionally, FSU has a new area of focus, namely exploring alternative energy and community capital in the agricultural sector

The Appalachian Maryland State Implementing Strategy Statement and Investment Program Fiscal Year 2014 reflects the needs as addressed by the committee as well as those identified through coordination with the various departments of economic development.

B. Background

The Maryland Appalachian region consists of three counties and twenty-four municipalities. From the foothills of Washington County to the plateaus of Garrett County, it is a picturesque view of high peaks and fertile valleys. In the past, the eastern valleys saw high agricultural production, while the mountainous regions produced bituminous coal. Eventually, large manufacturers saw this prosperous region as an excellent location for their new business.

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

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



As highway systems became the preferred mode of transportation for industry, Western Maryland, and in particular, Allegany and Garrett Counties were left behind. Interstate highways became a critical factor for development and investment by company’s looking for fast, efficient modes of transport. Interstate 68 in Western Maryland was completed in August of 1991- almost thirty years after this vital infrastructure was planned for development. During this thirty-year period, Appalachian Maryland saw some of its biggest declines in employment and population and increased poverty levels.

Over the years, several manufacturing companies in the region employed 1,500 or more people. Most of those companies are no longer here, and new plants of this size are few and far between. This decline in large manufacturing plants forced the region to diversify and they have grown because of that effort. Manufacturing is still a major part of the workforce today, but large companies today employ 300-400 people instead of 1,500, and a plant closing does not devastate the region as it once did. Other major industries of the past such as mining and agriculture are being supplemented with new and emerging tourism efforts, information technology related businesses and the sustainable energy industry.



The highways that spark prosperity and growth today do not carry cars or trucks, but instead carry information, voice and data. Again, Western Maryland is behind in the development of this critical infrastructure to attract and retain businesses but that



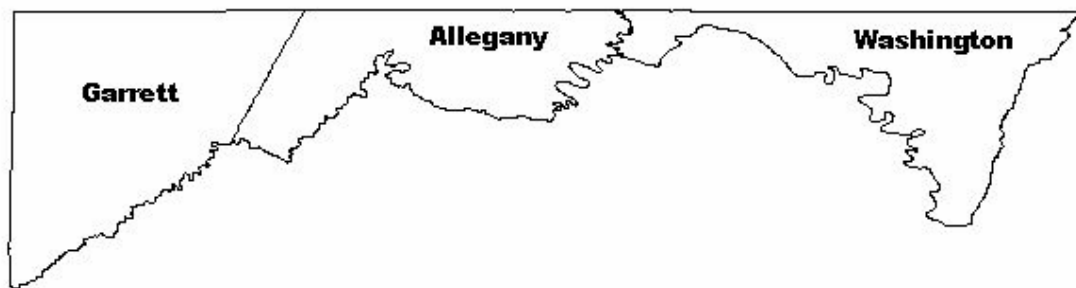
may soon be changing with availability of the new network that will become available in August 2013. The three counties of Western Maryland now suffer more from underemployment than unemployment and they know that technology related infrastructure and focusing on education is the key to higher paying jobs, population growth and ultimately the building of a sustainable tax base.

II. Annual Assessment of Appalachia Maryland

A. Identification of Counties

Appalachian Maryland consists of the three western most counties of Allegany, Garrett and Washington. Historically these counties have thrived on a manufacturing base. It was this lack of diversity and geographic isolation that contributed to the economic decline over the years. The counties still rely heavily on manufacturing as a major industry sector but now the companies are much smaller. While a company leaving still has negative impacts on the community, the smaller size of most companies means the impact is not as devastating as it once was.

The Appalachian Regional Commission (ARC) has designated Allegany, Garrett and Washington Counties as Transitional for FY 2014.



B. Demographic History

1. Population

The Appalachian Region of Maryland has historically had one of the slowest growth rates of the State. For many years this area has seen only a slight increase in population largely due to Washington County and the influx of new construction for those moving outside of the urban area. While the increase has been modest it still shows that the area is growing in population.

July 2012 estimates show a decrease in the region's population of just under 400 people. While Washington County continues to grow slowly, Garrett County still remains relatively stagnant. Allegany County is projected to continue to lose population at a faster pace than the past year and remains the only county in the state to show negative growth. While this may be alarming, these state estimates are not calculated in the same fashion as the census figures with number for colleges and prisons factored differently. Ultimately the population numbers are stable when these numbers are factored in.

POPULATION DEMOGRAPHICS

County Populations

	<u>7/1/2012</u>	<u>7/1/2011</u>	<u>7/1/2010</u>	<u>7/1/2009</u>	<u>7/1/2008</u>	<u>7/1/2007</u>	<u>7/1/2006</u>	<u>7/1/2005</u>
MARYLAND	5,884,563	5,828,289	5,773,552	5,699,478	5,658,655	5,634,242	5,612,196	5,582,520
WESTERN MARYLAND REGION	253,046	253,403	252,614	247,997	247,766	247,312	245,317	243,543
Allegany County	74,012	74,489	75,087	72,532	72,658	72,665	72,441	72,694
Garrett County	29,854	30,097	30,097	29,555	29,658	29,648	29,642	29,654
Washington County	149,180	148,817	147,430	145,910	145,450	144,999	143,234	141,195

Prepared by the Maryland Department of Planning, Planning Data Services, March 2013

Western Maryland Municipalities

Place	7/1/2012	7/1/2011	7/1/2010 Census	7/1/2009	7/1/2008	7/1/2007	7/1/2006	7/1/2005	April 1, 2000 Population Estimates Base/1
Maryland	5,884,563	5,839,572	5,773,552	5,699,478	5,633,597	5,618,899	5,602,258	5,575,552	5,296,516
Accident town	324	324	325	327	330	331	334	337	353
Barton town	445	448	457	455	452	456	459	458	478
Boonsboro town	3,455	3,454	3,336	3340	3,399	3,374	3,324	3,052	2,890
Clear Spring town	357	358	358	465	461	463	464	464	455
Cumberland city	20,572	20,715	20,859	20,449	20,495	20,632	20,648	20,829	21,694
Deer Park town	393	397	399	381	382	384	386	389	405
Friendsville town	484	489	491	499	503	505	508	514	539
Frostburg city	8,805	8,856	9,002	7,822	7,719	7,764	7,787	7,783	8,198
Funkstown town	885	887	904	942	937	940	938	954	983
Grantsville town	762	768	766	630	649	651	657	665	705
Hagerstown city	40,638	40,565	39,662	39,996	39,728	39,538	38,915	38,193	36,875
Hancock town	1,563	1,565	1,545	1,752	1,743	1,737	1,716	1,726	1,745
Keedysville town	1,163	1,163	1,152	874	862	838	811	825	498
Kitzmiller town	317	320	321	276	278	280	282	285	302
Loch Lynn Heights town	544	550	552	431	435	437	440	445	469
Lonaconing town	1,170	1,181	1,214	1,123	1,125	1,136	1,139	1,150	1,205
Luke town	64	64	65	73	73	74	75	75	80

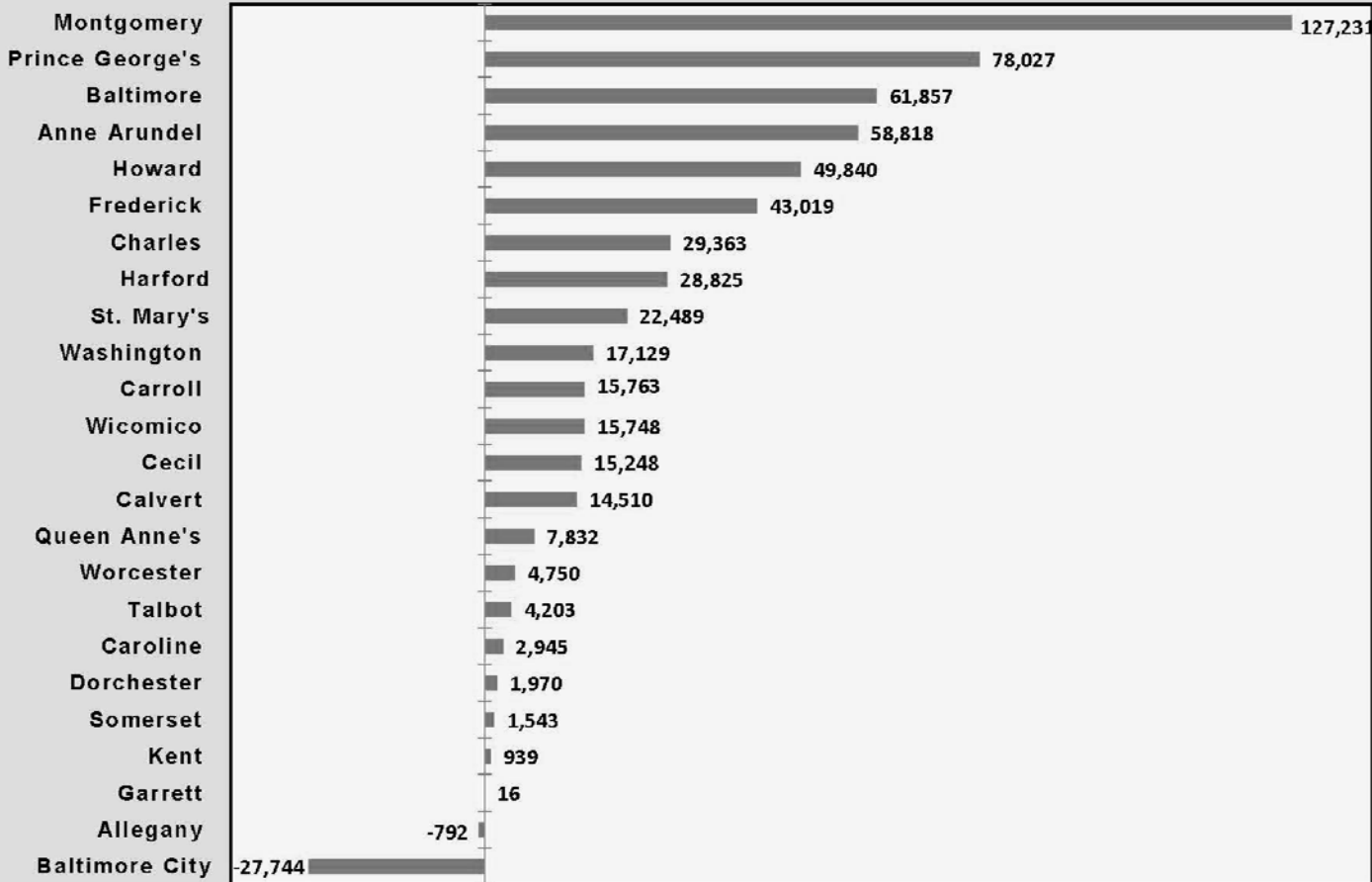
Midland town	441	446	446	439	440	444	447	451	473
Mountain Lake Park town	2,135	2,150	2,092	2,083	2,106	2,112	2,125	2,147	2,248
Oakland town	1,902	1,916	2,006	1,844	1,850	1,862	1,879	1,902	1,963
Sharpsburg town	710	710	705	661	660	662	670	671	691
Smithsburg town	2,987	2,986	2,975	2,908	2,907	2,902	2,864	2,737	2,179
Westernport town	1,850	1,865	1,888	1,945	1,963	1,975	1,995	2,022	2,104
Williamsport town	2,138	2,139	2,137	2,278	2,280	2,194	2,123	2,012	1,868

Prepared by the Maryland Department of Planning, Planning Data Services, May 23, 2013

Total Population Change for Minorities and Non-Minorities for Western Maryland's Jurisdictions, April 1, 2010 - July 1, 2012

State/Region/Jurisdiction	Total Population Change	Non-Hispanic White Alone Change	Non-Hispanic White Change as Pct. of Total Change	Total Minority Change	Minority Change as a Percent of Total Change
Maryland	111,011	4,238	3.8%	106,773	96.2%
Western Maryland Region	432	-1,999	-462.7%	2,431	562.7%
Allegany	-1,075	-1,290		215	
Garrett	-243	-345		102	
Washington	1,750	-364	-20.8%	2,114	120.8%

Population Change 2000-2012



Source: US Census Bureau, Population Estimates, March 2013
 Prepared by Maryland Department of Planning

2. Income

Income in Western Maryland is still well below the average for the State of Maryland. This is reflected in the high poverty rates seen in all three counties. The average per capita personal income for the State of Maryland is \$50,656, well above the national average of \$41,560. The numbers reflected by Western Maryland Counties show that income levels are well below the state and national average. The per capita personal income the Western Maryland Counties are more than 29% less than the State average. Allegany County is by far the lowest at only 65% of the State average. This 29% disparity with the state per capita income shows that Western Maryland is losing ground when it comes to keeping pace as last year the disparity was only 25%.

As outlined in the table below, the income in western Maryland continues to be among the lowest in the state.

County income (2010)	Per capita personal income (2011)	Per capita personal
United States	\$39,791	\$41,560
Maryland	\$48,621	\$50,656
Allegany	\$31,341	\$32,855
Garrett	\$36,380	\$38,486
Washington	\$35,438	\$37,438
WMD Region	\$34,333	\$35,954
Cumberland, MD MSA	\$31,134	\$32,547
Hagerstown MSA	\$33,156	\$34,604

Prepared by the Maryland Department of Planning, Planning Data Services, from U.S. BEA, March 2013

Current dollars

TABLE 5A
PER CAPITA PERSONAL INCOME (current dollars)

	2006	Rnk	2007	Rnk	2008	Rnk	2009	Rnk	2010	Rnk	2011	Rnk
UNITED STATES	\$37,725		\$39,506		\$40,947		\$38,637		\$39,791		\$41,560	
MARYLAND	\$44,858		\$46,839		\$48,864		\$47,419		\$48,621		\$50,656	
Maryland (Metropolitan Portion)	\$45,299		\$47,297		\$49,313		\$47,842		\$49,051		\$51,086	
Maryland (Non-Metropolitan Portion)	\$37,037		\$38,761		\$40,980		\$39,960		\$41,053		\$43,072	
BALTIMORE REGION	\$44,726		\$46,844		\$48,749		\$47,448		\$48,760		\$51,153	
Anne Arundel County	\$50,728	4	\$52,977	4	\$54,835	4	\$53,163	3	\$54,019	3	\$56,270	3
Baltimore County	\$46,660	5	\$48,647	5	\$50,095	5	\$47,691	5	\$48,773	5	\$50,926	5
Carroll County	\$40,559	10	\$42,050	11	\$44,084	11	\$43,184	10	\$43,727	10	\$45,507	10
Harford County	\$41,630	8	\$43,982	8	\$46,093	7	\$45,446	7	\$46,968	7	\$49,329	7
Howard County	\$58,170	2	\$60,839	2	\$63,431	2	\$61,600	2	\$63,289	2	\$66,300	2
Baltimore City	\$33,692	17	\$35,584	17	\$37,571	17	\$37,709	16	\$39,485	15	\$42,036	15
WASHINGTON SUBURBAN REGION	\$49,909		\$51,901		\$54,072		\$52,004		\$53,178		\$54,878	
Frederick County	\$41,384	9	\$43,414	9	\$45,674	8	\$44,539	9	\$45,017	9	\$46,610	9
Montgomery County	\$65,162	1	\$67,236	1	\$69,844	1	\$65,654	1	\$67,564	1	\$69,762	1
Prince George's County	\$35,567	15	\$37,361	15	\$38,847	15	\$38,727	15	\$39,168	16	\$40,215	16
SOUTHERN MARYLAND REGION	\$38,396		\$40,392		\$42,561		\$42,643		\$43,738		\$45,498	
Calvert County	\$40,121	11	\$42,477	10	\$44,935	10	\$44,700	8	\$45,666	8	\$47,483	8
Charles County	\$38,571	12	\$40,317	12	\$42,421	12	\$42,301	12	\$43,168	11	\$44,778	12
St. Mary's County	\$36,627	13	\$38,685	13	\$40,712	14	\$41,366	13	\$42,911	12	\$44,849	11
WESTERN MARYLAND REGION	\$30,503		\$31,855		\$33,743		\$33,479		\$34,333		\$35,954	
Allegany County	\$26,719	23	\$27,924	23	\$30,084	23	\$30,531	22	\$31,341	22	\$32,855	22
Garrett County	\$31,450	19	\$32,789	19	\$34,904	19	\$34,848	18	\$36,380	18	\$38,463	18
Washington County	\$32,245	18	\$33,664	18	\$35,366	18	\$34,706	19	\$35,438	19	\$37,008	19

Current dollars

TABLE 5A
PER CAPITA PERSONAL INCOME (current dollars)

UPPER EASTERN SHORE REGION	\$39,132		\$40,820		\$42,643		\$40,806		\$41,619		\$43,666	
Caroline County	\$28,730	22	\$30,042	22	\$31,004	22	\$30,445	23	\$31,232	23	\$32,819	23
Cecil County	\$34,332	16	\$36,199	16	\$37,742	16	\$37,082	17	\$37,918	17	\$39,689	17
Kent County	\$44,161	6	\$45,146	7	\$45,593	9	\$42,768	11	\$42,567	13	\$44,489	13
Queen Anne's County	\$43,434	7	\$45,180	6	\$47,666	6	\$45,683	6	\$47,173	6	\$49,605	6
Talbot County	\$53,000	3	\$54,937	3	\$58,172	3	\$52,707	4	\$53,050	4	\$55,721	4
LOWER EASTERN SHORE REGION	\$31,287		\$32,869		\$35,144		\$34,183		\$34,941		\$36,335	
Dorchester County	\$29,869	21	\$31,464	21	\$33,654	21	\$33,385	20	\$33,390	21	\$34,771	21
Somerset County	\$24,020	24	\$25,323	24	\$26,840	24	\$26,983	24	\$27,444	24	\$28,387	24
Wicomico County	\$30,985	20	\$32,499	20	\$34,381	20	\$33,344	21	\$33,935	20	\$34,985	20
Worcester County	\$36,484	14	\$38,371	14	\$41,831	13	\$40,000	14	\$41,717	14	\$43,987	14
BY BEA METROPOLITAN REGION												
Baltimore-Towson, MD (MSA)	\$44,704		\$46,815		\$48,730		\$47,417		\$48,732		\$51,126	
Cumberland, MD-WV (MSA)	\$26,707		\$27,851		\$29,699		\$30,210		\$31,134		\$32,547	
Hagerstown-Martinsburg, MD-WV (MSA)	\$30,781		\$31,840		\$33,013		\$32,423		\$33,156		\$34,604	
Phil-Camden-Wilm, PA-NJ-DE-MD (MSA)	\$43,548		\$45,490		\$47,488		\$45,532		\$46,840		\$48,723	
Salisbury, MD (MSA)	\$29,477		\$30,947		\$32,766		\$31,994		\$32,563		\$33,601	
Wash-Arling-Alex, DC-VA-MD-WV (MSA)	\$53,384		\$55,913		\$58,037		\$55,715		\$57,321		\$59,345	
Phil-Cam-Vineland, PA-NJ-DE-MD (CSA)	\$42,610		\$44,503		\$46,431		\$44,580		\$45,852		\$47,706	
Salisbury-Ocean Pines, MD (CSA)	\$31,549		\$33,129		\$35,421		\$34,330		\$35,228		\$36,623	
Wash-Balt-N.Virginia, DC-MD-VA-WV(CSA)	\$49,935		\$52,296		\$54,344		\$52,430		\$53,953		\$56,103	

Source: U.S. BEA (Table CA1-3), May 2013. Prepared by the Maryland Department of Planning

3. Unemployment

Based upon unadjusted data from 2012 it appears that the unemployment rate is declining steadily but it is difficult to determine from one quarter of data. Additionally, once the data is adjusted fluctuations as much as a point or more are not uncommon. It is also noteworthy to mention that some of this decline in figures may be attributed to those individuals who are no longer eligible for unemployment benefits and have simply stopped looking for work.

Location	Unemployment Average %		
	2010	2011	2012
United States	9.6	8.9	8.1
Maryland	7.8	7.3	6.8
Allegany	9.3	8.7	8.2
Cumberland, MD-WV MSA	8.9	8.4	8.0
Garrett	8.5	7.7	7.5
Washington	10.9	9.8	8.5
Hagerstown, Martinsburg MD-WV MSA	9.9	8.9	7.8

Source: Maryland Department of Labor, Licensing and Regulation), US Bureau of Labor Statistics

C. Economy

The Western Maryland economy has stabilized or is recovering based upon the unemployment figures. While we do not know for sure how well the unemployment figures characterize the economy due to the way the numbers are calculated it is indeed an encouraging sign.

Manufacturers across the region continue to feel the impact of the sluggish economy and have downsized their operations in an effort to cut costs in many instances. Based upon the two White House roundtable sessions held in Western Maryland during 2011, it is clear that employers have many concerns that affect their hiring practices and these concerns have not been alleviated. When individuals were asked why they are not hiring it was very evident that the uncertainty in the economy was a major contributing factor.

All of Western Maryland is now focused on, and committed to, bringing information technology companies and the infrastructure needed to the area. The Maryland Broadband Cooperative and Maryland's Department of Information Technology are committed to bringing much needed infrastructure and competition to the rural areas of Maryland including Allegany, Garrett and Washington Counties. This alone will bring a more favorable business climate to the region. A grant that will deploy fiber statewide was received in 2010 which will not be fully implemented until late 2013, will increase the chances that fiber will be available to many anchor institutions and ultimately private businesses. While it would not complete the Western Maryland infrastructure, it would open the door for the region to compete for businesses that now only locate in the urban areas. With fiber and multiple local access points in the region, local internet providers can sell service without major backhaul expenses that are currently charged by the major carriers. This barrier has to be removed in order for the area to compete for technology transfer related jobs. The largest hurdle to

overcome now is assuring that the local internet service providers can physically access the new points of presence in order to provide the needed services.

Western Maryland's approach to supporting growth in its economy is centered on assuring that the tools are in place for economic growth. This includes both the infrastructure and human resources necessary to modernize the region's economy. The region is concentrating on reuse and development of brown fields, and having infrastructure in place for new green field development. Of equal importance is making sure the region has the human resources ready and in place that will meet the needs of a new modernized economy. The local colleges and universities continue to produce a strong workforce and offer new and expanding courses each year. In addition, the community colleges in particular, offer a wide variety of specialty training for existing and new employers. A recent trend is to provide advanced technology training at the high school level.

The housing industry across the region has greatly affected the economy in many ways. With prices rising sharply several years ago in the housing market and then ultimately declining shortly there-after, many individuals have found themselves in the situation of paying a mortgage on a house and still gaining no available collateral or equity. For many entrepreneurs using the equity in their home as collateral to start a business is common practice. The lack of such equity has made it very hard for individuals to start new businesses as an alternative to being unemployed.

Western Maryland has shown a steady decline in unemployment levels since the 1980s up until the recent recession. With peak unemployment levels hitting double digits in 2010 the figures for 2012 are encouraging. Garrett County continues to lead the way with unemployment well below 8% for the most recent calendar year and Washington County has now dropped below the 8.5% mark.

D. Education

Garrett County continues to enhance educational opportunities for the local students by providing scholarships. In 2004 Garrett County ranked 21st out of 24 counties in Maryland for per capita personal income. Realizing that local graduates wishing to go to college cannot always afford the tuition, Garrett County made a bold financial commitment beginning in 2006. Garrett County began allocating funds that will give every high school graduate in the County the opportunity to attend the local community college tuition free for two years. This will enhance the workforce for the County and surrounding area and help ensure those in the county that wish to further their education will not be deprived of that opportunity. During the first year of this program 136 students took advantage of this program. An added benefit of this program is that it will increase enrollment at Garrett College, which in turn increases funding which is based on the number of students. This program is indeed paying dividends as Garrett is now ranked 18th in the state for per capita income. In addition the County is exploring additional opportunities to provide classes not offered at Garrett College through reciprocal agreements with adjacent Colleges. There are currently agreements in place with 13 West Virginia Counties.

Garrett County with the help of ARC now has a Technology Center for middle/high school students in Accident, MD. This facility offers classes in robotics as well as many other technology related courses. In just a few short years Garrett County's robotic program is now internationally recognized as they became world champions in 2013 at the 3rd annual Global Innovation Awards. The students competed against 20,500 teams from 80 countries to win this award.

Allegany County now has many distance learning labs to incorporate curriculums that are offered in one school to many other schools. This approach broadens the opportunities from students in all areas of the county while reducing the need for staffing small specialized classes in all schools. This project will take advantage of the broadband access that will shortly be available in the majority of the area schools as part of a \$115 million grant through the ARRA. Additional programs now offered in Allegany County Public Schools include the Medical Careers Academy which provides high school students the opportunity to become involved in the nursing or medical fields. In addition, the Center for Career and Technical Education is now offering an apprenticeship program for high school seniors in the construction trade. This on-the-job training will allow seniors to graduate with experience in the trade industry.

Allegany College continues to offer a variety of higher education courses as well as customized workforce training programs tailored to the needs of local companies. While this is not new, it is a key element in attracting companies to the area. In addition the college has continued to expand on its health care course including home health aide programs. Tied directly to the Allegany College programs, Frostburg State University is now offering the option for nursing students to continue on and receive a four year degree in that field. In 2012 Frostburg State University completed construction on the Sustainable Energy and Research Facility, a one of kind alternative energy lab. There are now ongoing efforts to create a strategy to attract private green energy entrepreneurs.

Washington County has several new capital projects related to education. In recent years the increasing population base has outgrown the existing school capacity meaning additional schools are needed. Three new elementary schools near Hagerstown were constructed and opened last year. In addition a fourth elementary school, Cascade Elementary near Smithsburg, was upgraded to accommodate the impacts of the redevelopment at Fort Ritchie. In addition to the new schools, the k-12 system has also expanded its curriculum and now will be offering courses related to biotechnology. The Board of Education has also taken steps to bring Hancock's School online by installing a fiber backbone.

In higher education Hagerstown Community College now offers expanded medical opportunities with additional nursing programs and a new wet lab that will be instrumental in providing a local workforce to new bio technology firms interested in the area. Five other Maryland Universities including Towson, Salisbury State, and Frostburg State have also shown an interest in Washington County and now offer courses in Hagerstown. This past year Hagerstown Community College developed the new Energy House program. This

program is designed to enable students to experience real life construction techniques for creating energy efficient housing including the addition of solar, wind and geothermal technologies.

Additional higher education programs now available in Washington County include the truck driving school in conjunction with Volvo and the Barbara Ingram School for the Arts.

The higher education institutions also continue to focus on the importance of education and technology and have worked with the state and local governments to achieve state of the art technologies for many of their curriculums. With much of this technology in place, the colleges are now working to share this infrastructure with public schools and create greater opportunities for advanced learning, including the formation of magnet schools in the near future.

All three counties will have new availability to high speed internet access in the near future as part of the \$115 million ARRA grant received by the state of Maryland in 2010. Those that are not provided access should be considered short term priorities with some of the already planning how to connect to the network.

E. Infrastructure

1. Transportation

Commerce in Western Maryland is largely driven by transportation via the Highway System. It is very evident that the majority of the growth in our region is attributed directly to interstate commerce. For instance, the largest growth area for industrial and commercial centers in the region is located within a few miles of the intersection of Interstate 81 and Interstate 70. West of Washington County, Interstate 68 is the driving force for development. For this reason, upgrades to Route 220 is in the planning stage but will be on hold for some time due to a lack of funding at both the federal and state level.

However Route 219 is now moving forward with a bid recently accepted to construct a new and improved 4 lane road from Meyersdale, PA to the Maryland state line. With a cost of \$111 million to construct 11 miles of interstate the project could be underway as early as October 2013. Further south on Route 219, a much needed bypass is underway around the town of Oakland. This project is also on hold pending lack of highway funds for construction.

While Virginia and West Virginia are currently working on a plan to upgrade Interstate 81 to six lanes, Maryland has not endorsed the idea largely due to the cost involved. Maryland State Highway Administration is currently conducting a study of the 12 mile project area, with tentative plans to improve this section of interstate in the future. While no clear solution has become evident, it is clear that Interstate 70 from Frederick to Hagerstown is also becoming overly crowded particularly during the rush hours. This will also need to be studied in the near future to plan for possible expansion.

Also very important to Allegany County is the development of a major North/ South Corridor. Maryland Route 220 is currently a 2 lane road that parallels the Potomac River from

Cumberland, MD to Keyser, WV. Along the way, the road passes through the towns of Cresaptown and Bel Air where the road becomes very congested. One of the area's largest employers, New Page, located just west of Maryland Route 220 receives approximately 350 trucks per day to the site at the mill. Approximately 60 percent of this truck traffic utilizes Route 220 as access to the mill. When calculated on a round trip basis, this means that approximately 420 trucks travel this route each day just going to New Page. Allegany County's newest advanced manufacturing park is also located along this route and has its first tenant who may eventually reach 500 employees. This will create further congestion in years to come. In addition, this area continues to be looked at as for new residential development which would add to the already congested areas.

A study is now being undertaken to determine the best route for Western Maryland to connect to Corridor H, an east-west highway that runs 148 miles from northern Virginia to central West Virginia and is part of the Appalachian Development Highway System. Without this development of a connector system between I-68 and Corridor H, the only Interstate quality access points to the Eastern portion of West Virginia will be through Clarksburg, WV or Front Royal, VA. The traditional Cumberland service marketing area, which extends to Moorefield and Petersburg, WV, will drastically shrink. Even though these markets are further in distance, travel times will be similar to the Cumberland market area because of the improved road access. Currently this project is on hold until funding can be allocated.

The airports on all three western counties now have runways of 5,000 feet or more that will accommodate small commercial jets. This is major accomplishment as corporations rely on air traffic for corporate visits as well as deliveries. A new terminal building at the Garrett County airport was recently finished and Washington County continues to offer commercial air traffic to Orlando and Daytona Beach twice per week with daily flights now being offered to Dulles International.

The Western Maryland region has a well-developed rail network. Since the purchase of Conrail by CSX there has been increased rail traffic in the region as well as increased job opportunities. Currently, there is a need to develop two specific rail projects in Western Maryland. The extension of the commuter rail system, between Hancock and Washington, DC, would open the Hagerstown-Martinsburg area to a wider labor force. Studies continue to look at commuter patterns for the expansion of the MARC rail system to this area.

In June 2013 Norfolk Southern dedicated a new \$97 million dollar intermodal facility in Greencastle, PA located on 200 acres. While this facility is not located in Maryland it will undoubtedly be a marketing point to attract businesses to the region.

The second major rail need is for rail spur access in Garrett County. A main rail line is located near Southern Garrett Industrial Park, and the new expansion of the park has been graded for the addition of a rail spur. Therefore, this industrial park provides the potential for location of businesses that utilize the rail transportation.

2. Water and Sewer

Municipal water systems are in place throughout the region and contribute the majority of the supply to the population. While many of these water systems have been in place for decades, some small municipalities are receiving their first distribution lines ever. The construction of water lines is very expensive. Major water plants for the City of Cumberland and the City of Hagerstown currently have no problem meeting the demand placed on the systems.

Water supply for the area, even during recent drought times has not been an issue for most areas in western Maryland. Municipal as well as county systems have been able to supply sufficient amounts of water as needed. While the impoundments currently can fulfill the demand, the aging infrastructure is now one of the largest concerns. Many of the water lines in the area are reaching their life span and will likely need replacement in the upcoming years. This is an expensive undertaking for the hundreds of miles of infrastructure that will need replaced.

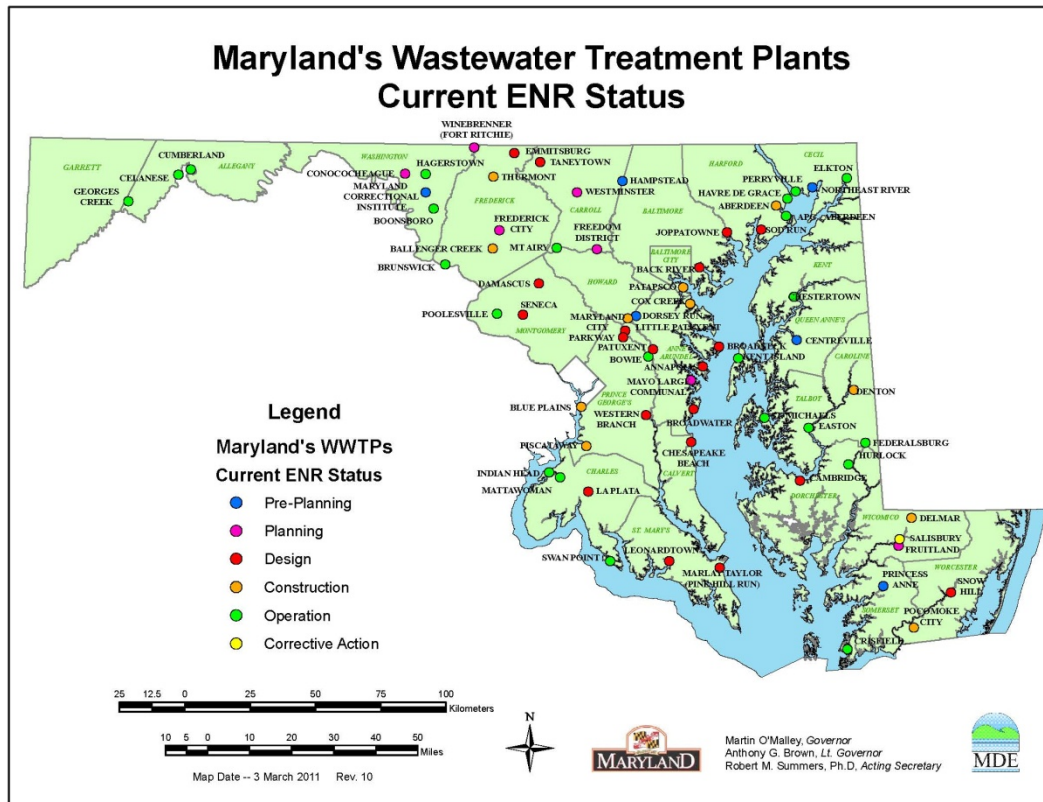
Sewer lines continue to be a costly issue for Western Maryland. Mandates are now in place to separate storm water from sewer. While this will effectively eliminate the sewer overflow issues that have occurred in the past, the cost to do this will be in the hundreds of millions of dollars and take 20 years to complete. Without the aid of state and federal grants to complete this task it is unknown if this task can be completed in the allotted time.

The Maryland General Assembly has in recent years passed legislation to address sewer plant upgrades. Every Marylander will pay a fee on their sewer bill that will go towards nutrient removal upgrades on treatment facilities. While it will take many years to complete, the major plants will be the first to be upgraded and smaller plants will follow as money permits. A detailed map of how this project is progressing is shown below, however this map has not been updated since 2011. In last year's legislative session the state voted to double this fee in order to achieve the desired goal of upgrading plants more rapidly.

Several municipalities are in the process of upgrading their treatment facilities to handle a larger volume of waste. Consent orders from MDE prohibited further development until such upgrades were completed. In Washington County a plan was recently completed that shows how the County will utilize sewer capacity over the next twenty years.

Garrett County has completed the construction of a new waste treatment plant near McHenry that is now the largest in the County. This new plant replaced the existing one and serves the entire Deep Creek Lake area. Other projects underway in Garrett County include upgrades of the Accident and Friendsville sewer system, and new construction to serve the Keyser's Ridge Business Park and McHenry Business Park.

In Allegany County plans remain under consideration to expand the existing treatment plant on Route 220 South to accommodate a growing business park and future residential growth in the area.



3. Telecommunications

The Western Maryland focus is on securing telecommunications and broad band services at competitive costs with the urban areas. We believe that this is the key to retaining and attracting companies that provide higher than average wage rates for the area. In addition to attracting companies, upgraded infrastructure also means people working in the urban area now have the option to telecommute from Western Maryland. This practice is becoming more common every year.

While each county has broadband available in most of the municipalities, as a rural area this leaves much of the county unserved. The state of Maryland in cooperation with the Maryland Broadband Cooperative received an award of \$115 million to provide much needed fiber infrastructure to areas in all three counties. The actual construction of this project is to be completed by August 31, 2013 and will provide service to dozens of public schools and other community anchor institutions. An added benefit of this project is that long-term, the network can be expanded to serve private companies over this network with competitive prices. Virtually every segment of private industry now considers access to affordable high-speed internet a must in order to compete in the global marketplace.

There are two major contributors to not having affordable broadband and it is hoped that this project will eliminate both of those issues. First and foremost, an area must have competition in order to have competitive prices. This new infrastructure will open vast opportunities for a variety of private companies to provide service where they currently do not have infrastructure. Because the infrastructure will be in place along many of the major routes,

private companies may be able to affordably utilize this network to complete smaller networks which reach into rural communities. Secondly, a local point of presence (POP) must be in proximity to the location served as companies must pay back hauling fees which is directly related to the distance of the nearest POP. These POPs will be located throughout the region which means that for many areas, that cost will all but be eliminated. The major obstacle that still needs to be addressed is how the local internet providers physically access this new network. In some instances this may require building additional fiber. This issue will have to be addressed in the near future to ensure the success of the project.

The Washington County Board of Education has been a leader in the deployment of fiber throughout the county. They currently have a fairly extensive network in the community and continue to expand. Most recently they are undertaking a project that will provide broadband to the Hancock High School. One of the most unique aspects of the network the board has undertaken is the addition of dark fiber to their network. The possibilities for providing access to a wide array of users in the future most certainly will be a great economic development tool for the county.

Recently all three counties have utilized ARC grants to complete a study which gives them a long-term plan on the best practices for implementing broadband deployment across the counties. As all three counties are very different demographically as well as geographically solutions for each area were developed that are very different but achievable.

Ultimately, public/private partnerships will be the backbone for creativity in order to serve the citizens of Western Maryland. A wide variety of technological solutions from Wi-Fi to fiber will be considered as well as other new and emerging technologies.

F. Health Care

Appalachian Maryland has a comprehensive and well developed medical care system. However, access to that care, especially affordable care for the uninsured, is still limited in many areas. The medical care system includes county health departments, hospitals, community health centers, mental health facilities, emergency care networks, a full variety of elderly care programs, and a National Cancer Research Center. The health care and related service industry continues to be the largest employers in the region despite having fewer doctors per population than the national average.

Over the past several years, the cost of health insurance has been one of the major issues facing Western Maryland and of course the nation. Although this problem is not unique to Western Maryland, it tends to impact the rural areas in an amplified manner due to the existence of many small businesses, lower average wages and higher unemployment levels. Since small and medium sized companies make up a large portion of the rural employment base, many of these companies are unable to continue providing health care to their employees.

The following numbers were compiled by the Maryland Behavioral Risk Factor Surveillance System located at www.marylandbrfss.org. The numbers are compiled by surveying those

that sought medical assistance during that particular year. Those without insurance were identified. If individuals without insurance did not seek medical treatment then they would not have been counted. The way numbers are compiled, the change in percentage listed below is not statistically significant in each county as it is a measurement over long periods of time that give and significant understanding of trends. What the data does tell us is that the percentage of individuals in Western Maryland without health insurance is greater than the statewide average. This is not surprising when you calculate that WMD has a very high poverty rate combined with a low per capita income. It is still undermined what impact the Affordable Care Act will have on these numbers.

A person was defined as	Area	% Uninsured (2009)	% Uninsured (2010)
uninsured if he or she did not have any private health	Maryland	11.5	10.9
	WMD	15.3	13.8
	Allegany	13.6	8.4
	Garrett	18.9	13.9
	Washington	15.3	17.1

insurance, Medicare, Medicaid, State Children's Health Insurance Program (SCHIP), state-sponsored or other government-sponsored health plan, or military plan. A person was also defined as uninsured if he or she had only Indian Health Service coverage or had only a private plan that paid for one type of service such as accidents or dental care.

Hospital trauma programs are also facing large financial problems in Western Maryland, due to increasing costs and state requirements. The Western Maryland Health System in Cumberland offers a Trauma Center, as does Robinwood Medical Center in Hagerstown. More recently there has been a great interest in reducing the number of patients that go directly to the emergency room. For this reason a number of urgent care facilities have begun operation in Western Maryland. These facilities allow walk-in patients thus providing an alternative to emergency room visits.

The Federal Government designates many areas in Western Maryland as Medically Underserved, where there is a lack of medical professionals to serve the low-income uninsured and underinsured. For this reason there has been an expansion of Federally Qualified Health Centers in the region. Federally Qualified Health Centers are now located in all three western Maryland Counties with two in Washington County, one in Allegany County, and one in Garrett County. Garrett County's facility was the most recent one built and is located adjacent to the Garrett County Health Department.

Currently the Garrett County Health Department has completed a major building expansion which now provides a new Emergency Department and Same-Day surgery suite, including a new hospital laboratory, radiology department and other crucial outpatient services.

After a study to upgrade facilities in Washington County, the Health System there built the largest facility in over 100 years. The new facility is located near the Health System's Robinwood Medical Campus, and creates a good connection with that largely out-patient,

400,000 square foot facility.

Allegany County has also constructed a new hospital that combines the Sacred Heart and Memorial Hospital campuses. The new facility is located on Willowbrook Road near Allegany Community College. This facility also houses a new Allegany County Health Department as well as the newly constructed Schwab Family Cancer Center. This new Cancer Center will provide cutting-edge technology typically not found at community hospitals.

Other health care facilities include: mental health facilities located in Allegany County, the Thomas B. Finan Center and the Joseph D. Brandenburg Center, Washington County's mental health facility and Western Maryland Hospital for long-term care, as well as the National Cancer Research Center. In addition to the region's medical facilities, the area has access to the major medical facilities in Baltimore, Morgantown, Pittsburgh and Washington. The region is also served by the Maryland State Police Medivac helicopter service.

In addition to the upgrading of facilities, the local colleges have recognized the shortage of health care professionals and offer new and expanded curriculum in this field, including four year programs to be offered at the University of Maryland Center in downtown Hagerstown, expanded curriculum at Hagerstown Community College and a four year bachelor's degree in nursing at Frostburg State University. Additionally, the Allegany County BOE also began a pre medical concentration in recent years.

G. Local Capacity Building

Western Maryland has developed a wide variety of unique partnerships to help build local capacity. Regional initiatives, as well as public and private partnerships, are just a few ways that resources can be extended beyond their initial capacity. The three county economic development departments work closely with private groups, such as the Cumberland-Allegany County Industrial Foundation, the Hagerstown-Washington County Industrial Foundation and the Greater Cumberland Committee that provide valuable input from a perspective that could not be obtained otherwise. In some cases these organizations provide marketing events, industrial land, and equipment purchases. These groups generally work very closely with the Chambers of Commerce in each respective county.

The Tri-County Council also plays a critical role by providing a Revolving Loan Fund (RLF) that provides gap financing to qualified businesses. Without this special fund, many small and mid-sized businesses would experience tremendous difficulty raising capital to open or expand their operation. The Council works directly with primary lenders to ensure that the program is marketed and available to potential clients. Banks must be involved in the process for clients to be eligible for funding. With qualified businesses in need of funds, the RLF is providing these funds and helping businesses to function and succeed. Most recently the fund was expanded by \$115,000 through a grant from the Department of Business and Economic Development and is available for loans in Allegany County.

Washington County is a member of QUADCO, an industrial development organization established for the purpose of cooperation and marketing of the four county I-81 corridor regions. Members consist of Franklin County, PA, Washington County, MD, Berkley County, WV, and Frederick County, VA.

Additionally, there are many groups, committees, and organizations throughout the region supporting tourism-related activities and events. The local tourism offices work to coordinate, and when possible, support these numerous special purpose groups to enhance the local travel and tourism industry. Many of these projects span more than one county making joint marketing possible. Some of these projects include the Allegany Highlands Trail, the C&O Canal and the regional Kiosk initiative which provides real-time tourism information to individuals across the three counties.

Another integral part of capacity building across the three counties is the local Community Action Agencies. These agencies provide a wide array of programs across the region. While not each agency provides the same services, these programs include job transportation, senior centers, Head Start centers, aging programs, loan funds and low income housing.

Several years ago Tri-County Council formed the Community Trust Foundation. This idea was first formed when it was identified that Allegany and Garrett Counties were the only two counties in the state without such a Foundation. The council formed a 501c3 and a board was comprised of the founding donors. Several funds are now in place and grants continue to be awarded as available. Additionally the Mineral County, WV was also added making this a multi-state project. The Foundation now exists as a stand-alone entity and works in

cooperation with the Greater Cumberland Committee for combined regional support.

H. Travel and Tourism

Many of the assets in Appalachian Maryland revolve around its natural beauty and scenic landscapes. With the numerous State Parks and recreational opportunities, the tourism industry helps sustain the economy.

With the National Road being named an “All American Road” and a scenic byway, there has been a great deal of publicity generated from this designation. Many of the sites along this road were featured in National Geographic with the Appalachian map of tourism destinations. With this designation and the completion of the Scenic Byways Corridor Assessment Plan, sites along the National Road that are consistent with the plan will be eligible for money from the Federal Scenic Byways Program.

State and National Heritage Area activities are also active in this region. The Maryland Heritage Areas Authority, which works to preserve historical and cultural resources and stimulate economic development through heritage tourism, provides support for three state certified heritage areas here. The Canal Place Heritage Area, located in the City of Cumberland, was created to be the catalyst for the preservation, development, and management of the lands adjacent to the C & O Canal in Cumberland, and to advocate for preservation and development within the Canal Place Preservation District and the greater Cumberland area. The Civil War Heritage Area, comprised of portions of Washington, Frederick, and Carroll Counties, was established to bring economic benefits to the three-county region by thematically linking and marketing the area’s Civil War heritage resources, supporting new and current visitor support businesses within the heritage area by generating greater visitation, and guiding visitors to places of unique character. A third state heritage area in the region, the Mountain Maryland Gateway to the West Heritage Area located in Garrett County, was recently added to the list.

National Heritage Area efforts in the area include the work of the Appalachian Forest Heritage Area (AFHA). Consisting of sixteen counties in the eastern region of West Virginia and two in western Maryland (Garrett and Allegany), the AFHA is a regional, grassroots effort to integrate central Appalachian forest history, culture, natural history, products, and forestry management into a heritage tourism initiative to promote rural community development. AFHA has completed the first step in the national heritage area designation process – development of a feasibility study – and continues to seek Congressional support for designation as a National Heritage Area.

The region boasts many tourism attractions and has continued to rely on them as a key piece in the economic development puzzle. Outdoor enthusiasts can enjoy numerous state parks and forests in the region from Deep Creek Lake to Washington Monument State Park. These parks include lakes, golf course and historic attractions throughout the region. State forests also offer bike trails, backpacking, camping, fishing, hunting and hiking trails. Some of the forests are over 50,000 acres and offer a chance to get away from the hustle and bustle of the city.

In May 2013 the Rocky Gap Lodge and Golf Resort became home to a Western Maryland casino that was added to boost both revenue and employment for the region. The facility seems to be having the desired effect with nearly 300 people employed and generating revenue of over \$700,000 in just the first 10 days of operation. Based on the first several months of operation, the Casino has already announced plans to expand the facility with a new building and additional parking.

The region also has many new ventures that upon completion will complement the other attractions and draw thousands of visitors from afar. Several years ago Cumberland started the first phase of the rewatering of the C & O Canal. The construction of a railroad bridge over the canal has become a barrier that has stalled the project during these economic times. The bridge construction is estimated to cost several million dollars and the rewatering project cannot move forward until it is complete. In addition, the Allegany Highlands trail, completed in 2007, is the final link between the Great Allegheny Passage (GAP) and the C& O Canal and offers a continuous hiking and biking trail 350 miles long from Pittsburgh to Washington DC. Efforts are underway now to reconstruct a small section of the C & O Canal in Washington County that is currently in disrepair and is the only section of the canal not intact.

Garrett County has also implemented a trail system that upon completion will traverse most of the county and link with many existing hiking trails. The trail system will be accessible from many of the municipalities and also serve as recreation areas for the local public. This trail system is extensive and county-wide and has gain a tremendous amount of community involvement over the past years. A coalition has now been formed that meets regularly to discuss progress and new projects. One of the newest phases of the project to gain traction is the installation of a bridge that will cross the Yough River at Friendsville, Md. This project is the beginning of a link between the Garrett County trail system and hundreds of miles of trails in Pennsylvania including Ohiopyle State Park.

The Garrett County region has become a destination for fly fishermen from across the country to experience one of the few places on the east coast where fisherman can achieve the grand slam of trout fishing. In a single day anglers can catch brown, rainbow, brook and cutthroat trout. Work continues to improve these fisheries and new businesses such as bed and breakfast are growing to meet the demand. Washington County also boasts the revitalized Beaver Creek which now boasts wild trout and brings fishermen from afar

Near Marsh Mountain adjacent to Deep Creek Lake, the region has undertaken a multiyear, private/public partnership to develop the Adventure Sports Center International (ASCI). This complex opened in 2009 and offers a recirculating whitewater course, amphitheater, rock climbing facility and an Adventure Sports Hall of Fame. Since its inception the ASCI has hosted a variety of events including many national events. In 2012 the ASCI was announced as the location for the International Canoe Slalom World Championships to be held in September 2014. In May of this year the preliminary event was held at the facility which proved to be very successful.

Washington County also offers many tourist attractions, most notable the Prime Outlets

located directly off of Interstate 70. Additionally the Yogi Bear Water Park is located south of Hagerstown and offers a new adventure for the summertime. Also, Hagerstown continues to be the venue for the annual Miss Maryland Pageant. The winner of that pageant competes nationally for the title of Miss America which is held in Atlantic City in September. Additional attractions include civil war battlefields, stone arch bridges and an annual blues festival.

Aside from all of the individual attractions Western Maryland has to offer, visitors tend to come to our area to enjoy the natural setting and the historic sites that are scattered across the region.

I. Workforce

Because of the extensive history in manufacturing and the presence of several colleges and two universities in the region, the workforce remains strong not only in terms of existing skills and education, but also the potential and opportunity for new skill development and training across an array of sectors. Companies entering the area that pay a living wage, generally are impressed with the quality workforce and the sizable number of applicants they receive. With major losses of companies the size and quality of the available workforce is ever growing.

The workforce of the Western Maryland is historically characterized as being of a dedicated, hard-working, traditional manufacturing quality. Employees and their families have worked life-long at plants, mills, and large corporations and are used to shift work. They do not, as a rule, relocate for a minimal increase in salary. With the lack of current employment, companies hiring are seeing 200 or more applications for every position.

The skills and requirements of the workforce are constantly changing. The workforce needs to become more technologically competent. To some degree, the Western Maryland workforce lags behind in the skills needed for the new workforce, largely due to geographic isolation, and the lack of educational capabilities and opportunities. Contributing to this isolation is the “digital divide” or lack of telecommunications infrastructure. This isolation is beginning to change with the ever-increasing involvement of the region’s university and community colleges. New courses related to Biotechnology, Robotics and Green Energy continue to grow and the infrastructure needed to support those industries is slowly improving.

Region-wide there is a shortage of qualified machinists. Several programs are in place throughout the region to help add new machinists to the workforce. In Garrett County, Southern and Northern High School offers a machinists training program. Across the border in Rocket Center, West Virginia the Robert C. Byrd is also offering training for machinists. These programs have been highly successful and graduates often have local jobs waiting as they complete the program. This shortage has been occurring for the past decade.

In addition to the focused areas of education, Garrett County has focused on taking high school graduates and making them skilled labor. For the first time in Western Maryland, Garrett County High School graduates will receive two years tuition free at Garrett

Community College. The County anticipates expanding upon this program in the upcoming years. In addition High School and Middle School students also have the opportunity to participate in the robotics program which was just recently recognized internationally.

Independent Labor Skill Studies are often a key to characterizing a workforce to new businesses looking to locate in the area. Because of the ever changing demographics of the region, studies such as this have a very short shelf life. The most recent study on Labor skills was conducted in 2007 and showed a willingness of individuals living outside of the area to return to the area if comparable jobs existed nearby. The study also showed that many people were underemployed based upon their current level of academics.



The Appalachian Regional Commission (ARC) presented a \$250,000 grant to Garrett County officials last Friday. The funds will be used for the design and installation of a wireless broadband system, which will serve about 800 Garrett County residences and businesses.

Left to right are Julianna Albowicz, Sen. Barbara Mikulski's western Maryland outreach coordinator; Sen. George Edwards; Garrett County Commissioner Gegan Crawford; Congressman John Delaney; Commissioner Jim Raley; ARC federal co-chair Earl Gohl; ARC program manager Al Feldstein, Maryland Department of Planning; Garrett County Department of Economic Development director Michael Koch; western Maryland coordinator Chris Uhl, Governor's Office of Intergovernmental Affairs; and Robin Summerfield, Sen. Ben Cardin's western Maryland field representative. Photo by Cheryl DeBerry, Garrett County Department of Economic Development.

Photo: The Republican (Aug. 1, 2013), www.therepublicannews.com

III. Strategic Goals and Objectives

GOAL 1: Increase Job Opportunities and per Capita Income in Appalachia to Reach Parity with the Nation

State Objective 1.1: Increase employment and sales in the travel and heritage tourism industry, particularly in the areas of outdoor recreation, convention attractions, and historical interest.

State Strategy 1.1.1: Support regional marketing programs for the travel and tourism industry.

State Strategy 1.1.2: Support the development of heritage tourism products linked to state and national byway and heritage area efforts.

State Objective 1.2: Stimulate growth of the region's businesses through development of technology resources.

State Strategy 1.2.1: Develop educational programs that support new technology development in the region.

State Strategy 1.2.2: Work with the region's higher education institutions to develop new programs that support new technology.

State Strategy 1.2.3: Provide startup funding through RLF programs for development of new technology related industry in the region.

State Strategy 1.2.4: Provide the infrastructure to support the development of new technology related industry in the region.

State Objective 1.3: Increase international exports from the ARC region.

State Strategy 1.3.1: Provide assistance to local companies' exports efforts through a regional export assistance office.

State Objective 1.4: Carry on a comprehensive economic development planning effort for the region.

State Strategy 1.4.1: Develop and maintain economic development plans.

State Strategy 1.4.2: Implement Sustainable Communities planning initiatives in order to enhance and maintain job creation and economic growth.

State Objective 1.5: Stimulate development of the central business districts of the region's municipalities and support projects, which will enhance the long-term development of the CBD areas.

State Strategy 1.5.1: Develop projects that encourage the reuse and/or the redirection of the use of downtown areas.

State Strategy 1.5.2: Provide the necessary infrastructure for reuse and/or redirect the use of downtown areas.

State Objective 1.6: Continue to support business expansions, start-ups and entrepreneurship.

State Strategy 1.6.1: Provide assistance to the region's entrepreneurs through the use of the district's RLF program.

State Strategy 1.6.2: Support the region's entrepreneurs through procurement assistance programs.

State Strategy 1.6.3: Support the region's entrepreneurs through the SBDC and other state programs.

State Strategy 1.6.4: Support programs that do not duplicate existing services but that fill gaps in the existing entrepreneur network.

State Strategy 1.6.5: Develop programs that will assist in the training or enabling of the region's entrepreneurs to market and do business development on an international level.

State Strategy 1.6.6: Develop advisory and training programs, as well as networking and "roundtable" opportunities for the region's entrepreneurs.

GOAL 2: Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy

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

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

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

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

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

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

State Objective 2.4: Enhance the capacity of local municipalities to plan for economic development and the needs of Western Maryland citizens.

State Strategy 2.4.1: Develop and maintain programs that will train residents of the region in economic development.

State Strategy 2.4.2: Develop and maintain economic development plans.

State Objective 2.5: Provide training opportunities to enhance the leadership skills of local officials and private nonprofit groups tasked with providing services to the community.

State Strategy 2.5.1: Development of programs that provide training in leadership development.

State Strategy 2.5.2: Development of programs that provide management skills to nonprofit organizations.

State Objective 2.6: Enhance and strengthen the communication capability of non-profit and government organizations.

State Strategy 2.6.1: Develop and maintain a modern telecommunications network.

State Strategy 2.6.2: Monitor the effects upon the region caused by the deregulation of telecommunications.

State Objective 2.7: Develop skills necessary to promote collaborative partnerships among government.

State Strategy 2.7.1: Sponsor groups, meeting, workshops and retreats that provide opportunities for intergovernmental cooperation.

State Objective 2.8: Provide training, which emphasizes the roles and responsibilities of being an effective board member.

State Strategy 2.8.1: Sponsor programs on effective board membership and their responsibilities.

State Objective 2.9: Appalachian high school students will have access to both school-to-work and postsecondary education compatible with real-world needs, technology applications, and academic preparation.

State Strategy 2.9.1: Work with local business to create a valuable school-to-work transition program.

State Strategy 2.9.2: Work to create programs directed toward postsecondary access and success.

State Objective 2.10: The percentage of Appalachian workers receiving advanced skills training will equal or exceed the national average.

State Strategy 2.10.1: Increase the region's emphasis on science, math, and engineering programs.

State Strategy 2.10.2: Development of new educational programs that will lead to the development of the new skills necessary in the 21st century.

State Strategy 2.10.3: Provide continuing education training in advanced skills to the regions workers.

State Strategy 2.10.4: Work with local businesses to develop programs that will encourage workers to take advantage of post-secondary education programs.

State Objective 2.11: All Appalachian counties will equal or exceed the national average for enrollment in post-secondary education.

State Strategy 2.11.1: Encourage academic competition between the regions post-secondary educational institutions.

State Strategy 2.11.2: Increase the region's employment opportunities for college educated personnel.

State Strategy 2.11.3: Increase emphasis on technical employment opportunities.

State Strategy 2.11.4: Development of new career programs in science and engineering.
State Strategy 2.11.5: Development of graduate degree opportunities locally, either by offering advanced degrees through existing institutions or through remote classroom programs.

GOAL 3: Develop and Improve Appalachia’s Infrastructure to Make the Region Economically Competitive

State Objective 3.1: Stimulate smart growth and neighborhood conservation by encouraging the development of the central business districts of the region's municipalities and support projects which will enhance the long-term development of the CBD areas.

State Strategy 3.1.1: Development of comprehensive planning.

State Strategy 3.1.2: Development of downtown planning documents.

State Strategy 3.1.3: Develop projects that encourage the reuse and/or the redirection of the use of downtown areas.

State Objective 3.2: Increase the number of marketable industrial sites within all three counties including the conversion and rehabilitation of vacant industrial facilities.

State Strategy 3.2.1: Provide the basic infrastructure to new industrial sites and rehabilitate vacant industrial facilities.

State Strategy 3.2.2: Utilize “Energy Efficient Efforts” when possible in the provision of infrastructure.

State Objective 3.3: Continue the development of a modern communications network that includes voice, data, and video and provide the native human resources necessary to maintain these networks.

State Strategy 3.3.1: Provide the basic infrastructure necessary for the public sector to develop and maintain a communication network.

State Objective 3.4: Increase the supply, choice, and condition of Appalachian Maryland's housing stock in order to meet the housing demands of current and future residents, thereby making the area more attractive to retention, expansion, and recruitment of business and industry.

State Strategy 3.4.1: Preserve the existing housing stock available to low and moderate income residents.

State Strategy 3.4.2: Increase the degree of homeownership affordable by low and moderate-income residents.

State Strategy 3.4.3: Increase the supply, choice and condition of Appalachian Maryland's housing stock.

State Strategy 3.4.4: Stimulate and assist with the production of Housing for low and moderate income residents.

GOAL 4: Build the Appalachian Development Highway System to Reduce Appalachia's Isolation

State Objective 4.1: Develop a balanced transportation system, which is supportive of economic growth and investment potential in the region.

State Strategy 4.1.1: Development of a north-south transportation network in the region.

State Strategy 4.1.2: Improve secondary and local access highways and roads that will support primary highway development and yield an integrated network of road transit in the region.

State Strategy 4.1.3: Increase the region's rail service capacity to meet potential increase in demand and to facilitate continuing industrial development.

State Strategy 4.1.4: Upgrade the region's airports to compliment future development and increase marketing support for air service.

State Strategy 4.1.5: Improve or provide access to recreational, health, or educational facilities.

State Objective 4.2: Support a viable system of public transportation.

State Strategy 4.2.1: Develop planning studies for public transportation.

State Strategy 4.2.2: Develop planning studies which incorporate walkable community strategies and consideration for bike paths.

State Objective 4.3: Provide required access to key industrial or commercial centers.

State Strategy 4.3.1: Transportation investments that will create or maintain employment opportunities in the region, such as projects that create access to an industrial park or area, strengthen city business district access, or upgrade multi-modal access to or from transportation facilities.

State Strategy 4.3.2: Support studies to increase use of public transit.

State Strategy 4.3.3: Support transportation studies that will help to revitalize or alleviate problems in downtown commercial areas.