



Comprehensive Economic Development Strategy 2019 - 2024

*Eastern Panhandle Planning
and Development Council*

Introduction and Vision

The Eastern Panhandle Planning and Development Council's (Region 9) Comprehensive Economic Development Strategy (CEDS) is a five-year economic plan to guide the growth of jobs, development, and commerce in Morgan, Berkeley and Jefferson County, West Virginia. The CEDS assesses changes in the area's economy over the past five year years, considers the impact of recent trends and reviews progress made towards achieving the goals and projects identified in the previous plan. The process for developing the CEDS was built upon local and broad-based input and guidance, as well as the integration of economic development planning. This CEDS identifies the key themes which surfaced during a lengthy research process and input from the community and the private sector. Each action recommendation included in this plan will assist in achieving the overall regional vision of the CEDS Plan;

***To continuously improve the quality of
life and economic vitality within
Morgan, Berkeley, and Jefferson County.***

This document is provided pursuant to 13 C.F.R. 303.1 which requires the development of a Comprehensive Economic Development Strategy (CEDS) designed to create and retain highly skilled workers and higher wage jobs for the region.

As background for the findings presented, this report includes:

- A regional vision statement with a Strategic Direction / Action Plan set of goals, objectives, and strategies.
- Findings from an in-depth analysis of community and private sector participation, including an analysis of regional strengths, weaknesses, opportunities, and threats; also referred to as SWOT
- An Evaluation Framework which measures the effectiveness and performance of the identified goals in the plan
- A Technical Report providing an outline of Current Conditions, Trends, Future Needs, and Strategic Findings.
- An Economic Resiliency component which identifies strategies for preventing, withstanding, and quickly recovering a shock to the economy.

Council Mission and Membership

The Eastern Panhandle Regional Planning and Development Council (Region 9) exists to assist local governments in resolving their common problems; engage in area-wide comprehensive and functional planning; identify, apply for, and administer certain federal and state grants; and provide a regional focus regarding multiple programs undertaken on an area-wide basis.

Region 9 was organized on June 20, 1972 in response to enabling legislation passed by the West Virginia Legislature and approved by the Governor on November 17, 1971. This enabling legislation is known as the Regional Planning and Development Act of 1971 and re-enacted Article 25, Chapter 8, of the West Virginia Code.

Membership

Membership of the Region 9 Council is specified by state law and the Council By-Laws. Current membership on the Council has been apportioned as follows:

Jefferson County

Commissioner Patsy Noland
Mayor Jim Auxer
Mayor Duke Pierson
Mayor Helen Dettmer
Mayor Scott Rogers
Mayor Wayne Bishop
Nicolas Diehl

Morgan County

Commissioner Ken Reed
Mayor Scott Merki
Mayor Timothy Mose
Daryl Cowles
Doug Mattingly

Berkeley County

Council Person James Barnhart
Guy Avey, III
Mayor Mary Ann Pile
Mayor George Karos
Mark Baldwin
Kenda Rogers
Kathy Mason
Sandy Hamilton
Neil McLaughlin
John Overington
Chris Strovel

SWOT Analysis

Throughout the fall 2017 and winter 2018, an in-depth analysis of regional strengths, weaknesses, opportunities and threats (commonly known as a “SWOT” analysis) was conducted to determine the issues and opportunities important to their our Region. Participants included Region 9 Board members, elected officials, local Chambers of Commerce, local business owners, and the general public (See Attachment __) for a copy of the public online survey. The Region’s Metropolitan Planning Organization was invited to complete the survey and interviewed. During this process three key themes were identified which will support this plan’s vision. These themes includes an above average quality of life, a lack of adequate infrastructure, and education and quality workforce.

According to the stakeholders, the biggest strength within the region is the overall quality of life and the region’s potential for growth and business opportunities. The area’s location near major interstates and proximity to the Baltimore / Washington metropolitan area has attracted both new residents and many employers. The population has grown 55% in the last 20 years, while 7,000 new jobs have been added after the Great Recession (2010-2017).

Priority transportation projects with in the region are US 340 expansion in Jefferson County, Interstate 81 Widening and Maintenance, WV 45 Apple Harvest Drive (Exit 12), the Inwood Bypass, and US 522 Bypass and Fairview Drive Connector in Morgan County. While some of these have been programmed within the state’s “Roads to Prosperity” road bond improvement initiative that will fund new projects as well as routine maintenance, others will need to continue to be supported by Region 9 and the Hagerstown Eastern Panhandle Metropolitan Planning Organization. Berkeley and Jefferson County enjoys service from the Maryland Transit Authority’s (MTA) Maryland Area Regional Commuter (MARC) Train. While this train relieves congestion along Maryland’s already congested roads, it also allows West Virginia residents access to the Capital and its markets. Stakeholders have identified funding concerns for maintaining service to the Eastern Panhandle.

Quality of Education in the region was identified as a strength from our stakeholders, but registered as a weakness in the general public’s survey responses. While this conflicting perception is cause for mild concern, Region 9 can work to communicate and celebrate the area’s unique attributes of one of the most successfully academic achieving region’s in the state and having one of the highest workforce participation rates to realize this plan’s vision.

Finally, stakeholders and the public are very concerned with the area’s substance abuse issues which plague this region, this state, and this nation. While Region 9 does not posses the authority to enforce laws, nor the expertise to oversee preventative and rehabilitation programs, we can assist in creating stronger pathways for hope for our youth and recovering addicts. By implementing the three key themes discussed above, Region 9 will facilitate job growth, wage competition, and diverse career options. Region 9 will assist other community partners to increase the quality of life, offer alternatives to getting high. and support the educational systems that can provide consistent, early intervention and develop skills necessary for students to become marketable professionals which take pride in their work and community.

Economic Resiliency

All communities, whether those in locations likely to experience significant natural disasters or those dealing with economic shifts, must be able to recognize their vulnerabilities. While there is no specific method for building regional economic resilience, the Eastern Panhandle Planning and Development Council's 2019 -2024 CEDS Plan has developed several strategies and actions that can mitigate the effects of an economic incident and support long-term recovery efforts. These are identified with a blue shield in the left column. The shield symbolizes the three points to resiliency; Preventing, Withstanding, and Recovering.

Preventing



Withstanding

Recovering

The strategies identified in the following section revolve around the below concepts:

1. Establishing Networks

Region 9 will continue to establish mechanisms to facilitate active and regular communication between the relevant sectors to collaborate on common challenges. Economic development professionals will work with their local/ regional emergency managers to address the risks identified through hazard mitigation planning.

2. Identifying regional economic challenges or deficiencies:

Region 9 will continue to monitor and report on "weak spots" or threats such as education, substance addiction, and infrastructure gaps.

3. Monitoring and adapting to emerging trends (Economic, Technology, Environmental, Policy, etc)

Region 9 will continue to educate their staff on resources which discuss future shifts in economics, technology, policy, environmental, education, or other sectors. For example, Business Recovery Centers, and WVU's Eastern Panhandle Economic Outlook.

4. Promoting a positive vision for the region:

Region 9 will continue to communicate and message the region's assets and opportunities to encourage potential outside investment, as well as with existing local stakeholders.

Strategic Direction / Action Plan

This report identifies the key findings of a research process and input from the community and the private sector. Each recommendation included in the report is related to this plan’s vision:

To determine feasible strategies which continuously improve the quality of life and economic vitality within Morgan, Berkeley, and Jefferson County.

During the community and private sector participation three key themes emerged as the foundation to which this plan will support our vision, economic growth, and resiliency.

Key Theme One: Infrastructure

Key Theme Two: Quality of Life

Key Theme Three: Education and Workforce Placement

Goals, Objectives, and Strategies

These key themes have been refined to create a Strategic Direction / Action Plan with goals, objectives, and strategies which are designed to be flexible and to reflect any new directions and opportunities as they are identified.

Goal # 1 : Ensure adequate quantity and quality of infrastructure and resources to remain competitive with surrounding states		
Objective 1.A.	Maintain adequate supply of readily available sites for manufacturing, technology, distribution and commercial activities for employer expansion or relocation	
	Strategy 1.A.1	Evaluate properties to determine needed utilities and feasibility to reach appropriate level of site readiness and identify available funding resources to assist.
	Strategy 1.A.2	Assist local Development Authorities with conducting financial assessments and feasibility plans which incorporate shell building construction and other levels site readiness.
	Strategy 1.A.3	Expand economic development professional communications by developing working relationships and resource understanding through networking forums, such as the “Greater Eastern Panhandle Economic Development Team” Toolkit Meetings.

Goals, Objectives, and Strategies

Objective 1.B.	Improve, expand, and preserve existing water/sewer infrastructure	
	Strategy 1.B.1	Work closely with Utility Directors and Managers to understand and identify rehabilitation, expansion, capacity needs and projects
	Strategy 1.B.2	Research and Report on new or under utilized funding/financing opportunities which include but limited to WIFIA, US Army Corp 571, Chesapeake Bay, and Clean Water Act 319, etc.
	Strategy 1.B.3	Work with local drinking water utilities to assist in implementing their Source Water Protection Plans.
Objective 1.C.	Support a diverse and resilient transportation network	
	Strategy 1.C.1	Encourage and support the work of the Hagerstown Eastern Panhandle Metropolitan Planning Organization (HEPMPO) by participation in the planning process for new roadway improvements and highway intersection upgrades as warranted by the growing population and traffic within the region.
	Strategy 1.C.2	Support and inform all communities on all transportation infrastructure planning and project funding opportunities. Provide this support when practical to Morgan County that is not within the jurisdiction of the HEPMPPO.
	Strategy 1.C.3	Assist the Eastern Panhandle Transit Authority construct a system that better meets the demand for transit service within the agency's service area as identified in their recent Transit Development Plan. (Link)
	Strategy 1.C.4	Assist with identification of funding sources to improve/expand trail network. regional bike plan
	Strategy 1.C.5	Assist with communicating "Roads to Prosperity" projects occurring within Morgan, Berkeley, and Jefferson Counties. Project List Link
	Strategy 1.C.6	Review existing, relevant transportation studies to determine Region 9's role in assisting with the implementation, such as https://www.i-81coalition.org/projects.html and https://www.hepmo.net/studies
Objective 1.D.	Maximize opportunities of alternative sources of energy which promote resiliency	
	Strategy 1.D.1	Identify and determine how businesses can gain access to natural gas
	Strategy 1.D.2	Promote programs that promote energy efficiency and supply renewable energy to local businesses and residents
	Strategy 1.D.3	Work with County and Regional Homeland Security Emergency Management to review energy redundancy needs.

Goals, Objectives, and Strategies Continued

Objective 1.E.	Improve communication networks (including broadband internet, mobile service, and emergency communication).	
	Strategy 1.E.1	Review local development codes to determine if a broadband expansion service requirement is needed and feasible. For example, establish a policy to when feasible and practicable install conduit during the construction and land development phase in identified areas.
	Strategy 1.E.2	Partner with Education, Industry and Research Organizations to encourage involvement in standards development, open architecture and the evolution of work and markets.
	Strategy 1.E.3	Adopt Regional Public Safety Standards for Wireless Networks: that incorporate Public Safety’s needs for reliability and ubiquitous coverage, interoperability and priority access.
	Strategy 1.E.4	Review the WV Broadband Enhancement council’s data collection and encourage region wide testing at their site. Foster relationships with existing service providers and encourage expansion and upgrades to system development by private sector entities. https://broadband.wv.gov/

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Goals, Objectives, and Strategies

Goal # 2 : Create an environment where all have a chance to prosper.		
Objective 2.A.	Provide greater access to local employment	
	Strategy 2.A.1	Assist in entrepreneurial development and other business opportunities
	Strategy 2.A.2	Increase market share of local agricultural operations
	Strategy 2.A.3	Build relationships with local workforce training program managers and other skill development opportunities
	Strategy 2.A.4	Build relationships with local Convention and Visitors Bureau to understand needs, then identify funding to support efforts which promote and market the Region's tourism industry.
	Strategy 2.A.5	Continue to manage the Western Potomac Economic Partnership that promotes the four county region as a great business friendly location to the Metropolitan areas of DC, Baltimore and Northern Virginia . www.westpep.com
	Strategy 2.A.6	Encourage expansion of existing entrepreneur services within the region and expansion of the Morgan County Business Incubator at the BR CTC and the Regional Innovation Center at Shepherd University. Continue to encourage and support citizens attendance and participation at the Eastern panhandle Entrepreneurs Forum.
	Strategy 2.A.7	Continue to encourage and support citizens attendance and participation at the Eastern panhandle Entrepreneurs Forum.
Objective 2.B.	Attract and retain younger workforce	
	Strategy 2.B.1	Participate in local Chamber of Commerce activities and encourage regional support for young professional networks.
	Strategy 2.B.2	Identify platforms to receive input from various generations to encourage civic participation and local active citizens.
	Strategy 2.B.3	Promote to our leaders and decision makers to generally review the make up of various Boards within the region to understand generational trends and encourage diversification of candidates during the new appointment process.
	Strategy 2.B.4	Evaluate community branding to focus on a younger target audience.
	Strategy 2.B.5	Promote downtown interconnectivity of walking and biking throughout the region.
	Strategy 2.B.6	Broaden the access to workforce skills as a direct route to employment through strengthened relationships with Blue Ridge CTC, Valley College , James Rumsey and Shepherd University and the regional employers whom search for younger workers.

Goals, Objectives, and Strategies

Objective 2.C	Support generational needs programs which allow for aging in place	
	Strategy 2.C.1	Understand the programs of Senior Life Services of Morgan County, Berkeley Senior Services, and Jefferson County Council on Aging to determine overlaps which may benefit the entire region.
Objective 2.D.	Maintain sufficient inventory of affordable housing.	
	Strategy 2.D.1	Develop accessible communication portal with area realtors and lenders to share finance programs and exchange desires of current home buyers and sellers.
	Strategy 2.D.2	Assist with the redevelopment and restoration of historic districts and other underutilized areas in the region.
	Strategy 2.D.3	Support the Eastern Panhandle Home Consortium and its Home Buyers Assistance Program through meeting organization and membership.
Objective 2.E.	Encourage greater community involvement and a regional sense of pride.	
	Strategy 2.E.1	Work with the WV Secretary of State office to support programs which increase voter turnout
	Strategy 2.E.2	Coordinate the promotions of volunteer opportunities around the region
	Strategy 2.E.3	Assist with Main Street and other downtown promotional programs
Objective 2.F.	Promote responsible stewardship of natural resources on land, in our Water, and in our Air to ensure resiliency.	
	Strategy 2.F.1	Support local and regional Hazard Mitigation Plans
	Strategy 2.F.2	Continue coordinating local government's efforts in the Chesapeake Bay Program
	Strategy 2.F.3	Promote programs which maintain, or improve, the region's current National Ambient Air Quality Standards (NAAQS)
	Strategy 2.F.4	Reduce percentage of solid waste entering landfills by through recycling program needs, innovative waste to energy technologies, and composting programs to minimize disposal of food waste
	Strategy 2.F.5	Encourage developing and implementing local energy efficiency programs
	Strategy 2.F.7	Assist communities in meeting their Tree Canopy or Riparian Buffer Goals
	Strategy 2.F.7	Create a networking/communication platform for regional brownfield project updates, strategies, and initiatives

Goals, Objectives, and Strategies

Objective 2.G.	Identify and promote recreation and leisure opportunities.	
	Strategy 2.F.1	Collaborate with area publications, visitor centers and other organizations to educate or install RSS Feed capability to join or create a regional “This is Happening” Clearing House for opportunities occurring within a nearby radius including other states. (For example http://www.localdvm.com/calendar#/)

Goal #3 : Maintain the highest-ranking region in academic achievement and employment placement.

Objective 3.A.	Create a presence within the education sector.	
	Strategy 3.A.1	Include County Boards of Education in Region 9’s Comprehensive Economic Development Strategy Plan information exchange portal and learn what role Region 9 can fulfill within their organizations.
	Strategy 3.A.2	Identify and assist with implementing programs or strategies within each of the above mentioned organization’s strategic plan that are mutually beneficial to the Eastern Panhandle.
	Strategy 3.A.3	Continue building strong relations with Technical Institutes and Community Colleges within the Eastern Panhandle.
Objective 3.B.	Increase the promotion and communication of educational opportunities within the Eastern Panhandle	
	Strategy 3.B.1	Request to be placed on the email lists of educational institution and training facilities to share with Region 9’s network and media platforms.
	Strategy 3.B.2	Understand school’s existing soft skills programs, such as Simulated Workplace and Positive Action, and lend support where needed.
Objective 3.D.	Expand workforce development initiatives	
	Strategy 3.D.1	Conduct meetings with private employers who are currently conducting local apprenticeship programs and understand the successes and weaknesses.
	Strategy 3.D.2	Routinely launch surveys, coordinate or attend forums which receive input from area employers.
	Strategy 3.D.3	Use of Region 9 Press releases and social media to promote and publicize networking opportunities, educational opportunities and private and public business tools

Evaluation

Performance measures used to evaluate the organization's implementation of the CEDS and impact on the regional economy.

Performance Measures

1. Number of Jobs Created After Implementation of the CEDS
 - a. Total Employment in Initial Year
 - b. Total Employment in Subsequent Year 2
2. Number and Types of Public Sector Investments Undertaken in the Region
 - a. EDA Sponsored Investments
 - b. Significant State and Local Investments
3. Private Sector Investment in the Region After Implementation of the CEDS
4. Gross Domestic Product growth in the Hagerstown Eastern Panhandle Metropolitan Planning Organization

Key Theme Indicators

1. Infrastructure
 - a. Average Internet Speed
 - b. Lane Miles
 - c. WV READY Properties*
 - d. Public Water and Sewer Service area (acres or square miles)
2. Education and Work Force Placement
 - a. High School Graduation Rates
 - b. 8th Grade Science, Math, and Reading Performance
 - c. Higher Education and Certificate Attainment
 - d. Average Annual Wage by Educational Attainment
3. Quality of Life
 - a. Median Household Income
 - b. House Purchase Price and Cost of Living Index
 - c. Persons Living in Poverty
 - d. Median age and Percentage of Population between 24 -35 years old
 - e. National Ambient Air Quality Index, Water Quality Initiatives, Chesapeake Bay Progress

Overview - People of the Region

Growth Trend 1: Continued Growth

At the 2010 census, Region 9 had a population of 177,208, which represents a 31.7% increase from the year 2000 (see Table 1). The population is expected to continue to grow and, by the year 2020, estimates show an approximate population of 194,543. Berkeley County is the largest county in Region 9 and is experiencing the greatest growth rate. From 2000 to 2010, Berkeley County increased in population by 37.2%. Then another 10.3% between 2010 to 2017, Finally, Berkeley County is projected to increase another 3.4% between 2017 and 2020. Morgan County is the smallest county in the region and experienced a 17.4% growth in population between 2000 and 2010 and is expected to increase slightly between 2013 and 2018 at 1.1%. Jefferson County's population growth falls between Berkeley and Morgan Counties, at 26.8% from 2000 to 2010 and another 4.7% from 2013 to 2018. In comparison, West Virginia's population declined 2.0% between 2010 and 2017, with the population the national growing 5.5% during that time.

TABLE 1: POPULATION IN REGION 9, WEST VIRGINIA, AND THE UNITED STATES, 2000-2020

	Berkeley County	Jefferson County	Morgan County	Region Total	West Virginia	United States
2000 (Actual)	75,905	42,190	14,943	133,038	1,808,344	281,421,906
2010 (Actual)	104,169	53,498	17,541	177,208	1,852,994	308,745,538
2017 (Estimate)	114,920	56,338	17,686	188,944	1,815,857	325,719,178
2020 (Projected*)	118,838	58,009	17,696	194,543	1,828,060	118,838
Change 2000 to 2010	37.2%	26.8%	17.4%	31.7%	2.5%	9.7%
Change 2010 to 2017	10.3%	5.3%	0.8%	6.6%	-2.0%	5.5%
Change 2017 to 2020	3.4%	3.0%	0.1%	3.0%	0.7%	3.6%

Growth Trend 2: Changing Age Composition

Region 9 has a population that is slowly aging. From 2010 - 2016, Berkeley and Jefferson Counties median age increased by approximately one year, while the median age of Morgan County's population significantly increased by nine years (Table 2). This level of change warrants further investigation in the future to determine the cause.

West Virginia recently ranked last in Forbes Magazine's "Best States for Business". One category within this ranking was labor supply, in West Virginia also ranked last. Labor Supply measures a number of factors including education attainment, net migration over the past five years, and the projected population growth over the next five years. While the previous factors favor Region 9 vs the state as a whole, it falls short in the last variable of the percent of the population between the ages of 25 and 34. The article quotes Jeff Lessard, who works with clients on their occupancy and location strategies at Cushman & Wakefield, a top site locating firm. Lessard states *"Finding highly-educated millennials is top of mind for all of our clients."*

TABLE 2: MEDIAN AGE IN REGION 9, WEST VIRGINIA, AND THE UNITED STATES, 2000-2018

	Berkeley County	Jefferson County	Morgan County	West Virginia	United States
2000	35.8	36.8	40.7	38.9	35.3
2010	37.5	38.8	37.5	41.3	37.1
2016	38.4	40.1	46.6	41.9	37.7
Change 2000 to 2010	4.8%	5.4%	-7.9%	6.2%	5.1%
Change 2010 to 2016	2.4%	3.4%	24.3%	1.5%	1.6%
Population between 25-34 years old	13.4%	11.3%	9.5%	11.9%	13.6%

Overview - People of the Region

Growth Trend 3: Educational Attainment

Region 9 has a highly educated workforce. Jefferson County leads the region in educational attainment, with 29.9% of the population 25 and older having achieved a bachelor's degree or higher (Table 4). Berkeley County's rates of educational attainment mirror the state's rates, with Morgan County lagging behind somewhat. The region as a whole has a higher rate of population aged 25 and over with at least a bachelor's degree or graduate degree than the state, but fell short of the national average.

TABLE 3: EDUCATIONAL ATTAINMENT- 18 TO 24 YEARS OF AGE (YEAR 2016)

	Berkeley County	Jefferson County	Morgan County	West Virginia	United States
Less than high school graduate	16.50%	12.60%	9.80%	12.90%	13.80%
High school graduate (includes equivalency)	40.50%	25.80%	53.40%	36.20%	30.00%
Some college or associate's degree	33.40%	54.10%	28.60%	43.20%	46.00%
Bachelor's degree or higher	9.60%	7.50%	8.20%	7.80%	10.20%

TABLE 4: EDUCATIONAL ATTAINMENT- 25 YEARS OF AGE AND OLDER (YEAR 2016)

	Berkeley County	Jefferson County	Morgan County	West Virginia	United States
Less than 9th grade	3.00%	3.70%	5.10%	4.90%	5.6%
9th to 12th grade, no diploma	9.70%	7.50%	12.00%	9.70%	7.4%
High school graduate (includes equivalency)	37.70%	32.20%	40.90%	40.50%	27.5%
Some college, no degree	21.90%	20.30%	16.50%	18.50%	21.0%
Associate's degree	7.50%	6.40%	7.80%	6.80%	8.2%
Bachelor's degree	12.90%	18.60%	10.80%	11.90%	18.8%
Graduate or professional degree	7.30%	11.30%	6.80%	7.70%	11.5%

TABLE 5: EDUCATIONAL ATTAINMENT- 25 - 34 YEARS OF AGE (YEAR 2016)

	Berkeley County	Jefferson County	Morgan County	West Virginia	United States
High School Graduate or higher	90.5%	91.9%	89.7%	90.7%	89.3%
Bachelor's degree or higher	22.1%	28.2%	27.3%	24.9%	33.7%

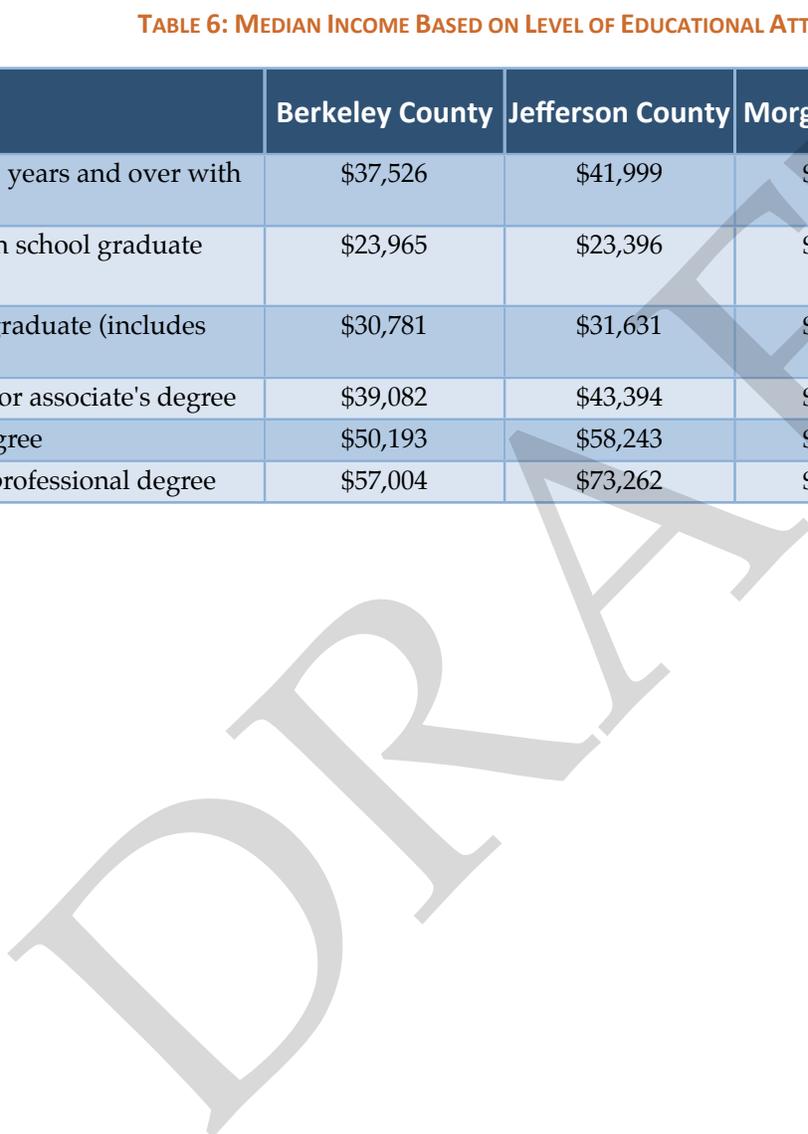
Overview - People of the Region

Growth Trend 3: Educational Attainment

Jefferson County leads the region in Median Income. This is most noticing when comparing Jefferson County’s Bachelor degree attainment level graduates who earn 38.6% more than Morgan County residents who have attained the same level of education (Table 6). This may be due to its proximity to the Washington D.C. metro area’s competitive market, as 48.6% of Jefferson County’s residents currently work outside of the state compared to Morgan County at 40.7% and Berkeley at 39.0%.

TABLE 6: MEDIAN INCOME BASED ON LEVEL OF EDUCATIONAL ATTAINMENT (YEAR 2016)

	Berkeley County	Jefferson County	Morgan County	West Virginia	United States
Population 25 years and over with earnings	\$37,526	\$41,999	\$30,505	\$31,891	\$36,810
Less than high school graduate	\$23,965	\$23,396	\$22,222	\$20,338	\$20,924
High school graduate (includes equivalency)	\$30,781	\$31,631	\$27,447	\$27,008	\$28,672
Some college or associate's degree	\$39,082	\$43,394	\$28,047	\$30,568	\$34,412
Bachelor's degree	\$50,193	\$58,243	\$42,022	\$42,248	\$51,094
Graduate or professional degree	\$57,004	\$73,262	\$48,203	\$54,710	\$67,832



Overview - Regional Economy

Job Trends

The industry employing the most workers is the Accommodation and Food Services sector, at 15.4%, a decrease of 0.83% from 2013. The second-largest industry in the region is the Health Care and Social Assistance, at 13.9%, a slight increase from 2013. The following sectors were the smallest industries in Region 9, each employing less than 1% of workers: Agriculture, Forestry, Fishing, and Hunting; Mining; Utilities; and Management of Companies and Enterprises.

Berkeley County averaged 32,942 annual jobs for 2016. The top employing industry in the county was the Health Care and Social Assistance sector, employing 16.7% of all jobs in Berkeley County and adding 13.7% more jobs since 2013. Between 2013 and 2016, the fastest-growing industry in Berkeley County was Transportation and Warehousing growing 30%. This leading industry not only stands-out in the region and state, but also is growing significantly faster here than the national average.

Jefferson County averaged 15,613 annual jobs for 2016. The industries employing the most workers were the Accommodation and Food Services sector at 25.5% and the Educational Services sector at 16.7%. As reported by Workforce West Virginia, the top employers in the county were PNGI Charles Town Gaming, the Jefferson County Board of Education, and Shepherd University. Between 2013 and 2016, the Administrative and Support and Waste Management and Remediation Services industry more than doubled and grew more than any other sector in Jefferson County.

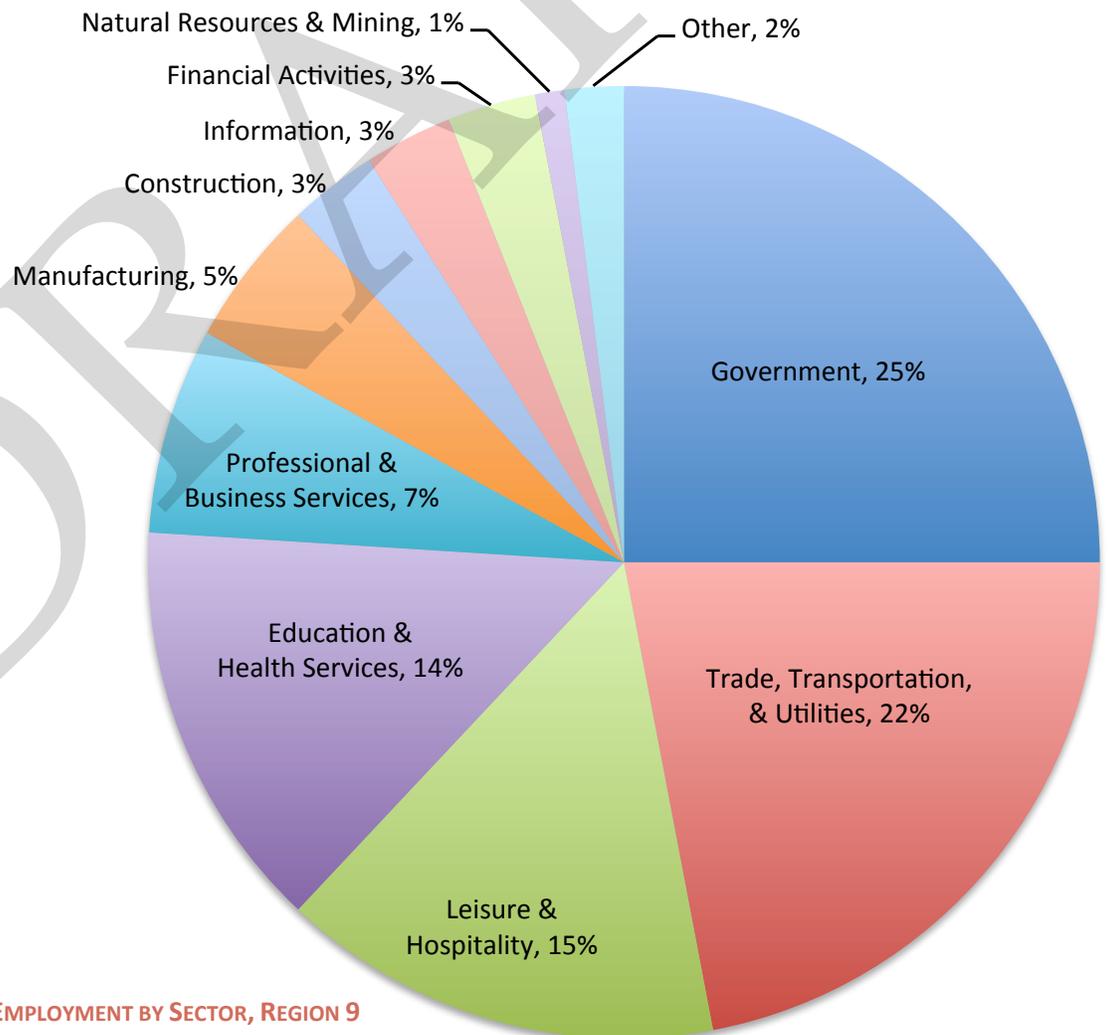


FIGURE 1: EMPLOYMENT BY SECTOR, REGION 9

Overview - Regional Economy

Morgan County

Morgan County averaged 2,919 jobs in 2016. The top employing industry was the Health Care and Social Assistance sector, employing 20.7% of the county's workforce. The Accommodation and Food Services sector, Retail Trade, and Construction round out the next-highest employing industries. The top two employers in Morgan County are the Board of Education and Valley Health Systems Inc..

As with Jefferson County, the fastest-growing industry in Morgan County, between the third quarters of 2013 and 2016, was Administrative and Support and Waste Management and Remediation Services industry (71%). The Accommodations and Food Service added the most jobs, 90, and grew 32%, significantly more than the national average.

TABLE 7: EMPLOYMENT BY SECTOR (Q3 YEAR 2016)

	Berkeley County	Jefferson County	Morgan County	Regional Share of Job Market by Sector
Agriculture, Forestry, Fishing and Hunting	147	65	22	0.5%
Mining, Quarrying, and Oil and Gas Extraction	62			0.1%
Utilities	232	26	22	0.6%
Construction	1144	550	121	3.8%
Manufacturing	1529	914	227	5.6%
Wholesale Trade	1446	281	29	3.7%
Retail Trade	4138	1814	359	13.3%
Transportation and Warehousing	2115	323	38	5.2%
Information	1754	121	19	4.0%
Finance and Insurance	730	298	76	2.3%
Real Estate and Rental and Leasing	317	167	16	1.1%
Professional, Scientific, and Technical Services	1322	488	99	4.0%
Management of Companies and Enterprises	166	36		0.4%
Administrative and Support and Waste Management and Remediation Services	1724	840	70	5.6%
Educational Services	2678	2510	194	11.4%
Health Care and Social Assistance	4941	1117	543	13.9%
Arts, Entertainment, and Recreation	436	485	18	2.0%
Accommodation and Food Services	3109	3835	371	15.4%
Other Services (except Public Administration)	632	508	91	2.6%
Public Administration	870	603	308	3.76%

Source: U.S. Census Bureau, Quarterly Workforce Indicators

Overview - Regional Economy

Regional Competitive Effect

Regional competitive effects represent the unique advantages a particular region has in a given industry. Sometimes a region's growth in a given industry outpaces national level growth trends for the industry. This behavior indicates that there is something unique about the region causing it to experience a regional competitive effect in that industry. Regional competitive effect is calculated by the total regional growth of the given industry and subtracting the national growth for that same industry during the same period of time.

A positive number indicates job a sector grew faster in Region 9 than the nation, and is therefore considered a leading industry. A negative number indicates either slower growth or decline of an industry in the region, and is therefore considered a lagging industry.

Arts, Entertainment, and Recreation was once the fastest growing industry in 2012, has now become the most lagging industry since. This could be attributed to neighboring states legalizing table games and causing job loss. This is reflected most in Jefferson County, the location Hollywood Casino and Race Track, which experienced a 29.6% job loss from 2013-2016.

TABLE 8: REGIONAL COMPETITIVENESS EFFECT (Q3 YEAR 2013 TO Q3 YEAR 2016)

Leading Industries	Regional Job Sector Growth vs Nation
Transportation and Warehousing	59.00%
Management of Companies and Enterprises	14.00%
Educational Services	14.00%
Information	10.00%
Administrative and Support and Waste Management and Remediation Services	9.00%
Lagging Industries	
Agriculture, Forestry, Fishing and Hunting	-22.00%
Mining, Quarrying, and Oil and Gas Extraction	-9.00%
Construction	-19.00%
Manufacturing	-8.00%
Real Estate and Rental and Leasing	-11.00%
Professional, Scientific, and Technical Services	-8.00%
Arts, Entertainment, and Recreation	-26.00%
Accommodation and Food Services	-11.00%
Other Services (except Public Administration)	-8.00%

Overview - Regional Economy

Location Quotient

The location quotient (LQ) is a way of quantifying how concentrated a particular industry is in one area compared to a larger region. In this analysis, industry employment in the three-county region is compared to industry employment in the state of West Virginia. An LQ of greater than 1 means the region has a higher concentration of jobs in a given industry than the state, and an LQ of less than 1 means the state as a whole has a higher concentration of jobs in an industry than does Region 9. Industries with a high LQ value are typically exporting industries and are important because they bring income into the region.

The following table demonstrates the difference in industry employment between Region 9 and the state of West Virginia. Industries with an LQ of greater than 1 are highlighted and represent the industries in which Region 9 has a high concentration of workers, and therefore, a competitive advantage. The LQ indicator should be used with other indicators to determine a total picture of an industry. For instance, Agriculture, Forestry, Fishing, and Hunting industry (LQ= 1.46) is showing strength locally when compared to the state, but lags when compared to national growth. This number can also reaffirm the strongest industries in Region 9. For instance, Transportation and Warehousing, Information, and Educational Services all have high LQs and are Leading Industries when compared to the Nation.

TABLE 9: REGIONAL LOCATION QUOTIENT (YEAR 2016)

Jobs by Industry Type	Region 9		West Virginia		LQ
	Employment	% of Total	Employment	% of Total	
Agriculture, Forestry, Fishing and Hunting	234	0.49%	1,832	0.33%	1.46
Mining, Quarrying, and Oil and Gas Extraction	62	0.13%	18,011	3.27%	0.04
Utilities	280	0.58%	7,515	1.36%	0.43
Construction	1,815	3.77%	35,821	6.50%	0.58
Manufacturing	2,670	5.55%	47,670	8.65%	0.64
Wholesale Trade	1,756	3.65%	21,402	3.88%	0.94
Retail Trade	6,311	13.11%	84,917	15.41%	0.85
Transportation and Warehousing	2,476	5.14%	20,200	3.67%	1.40
Information	1,894	3.93%	10,812	1.96%	2.00
Finance and Insurance	1,104	2.29%	17,984	3.26%	0.70
Real Estate and Rental and Leasing	500	1.04%	6,638	1.20%	0.86
Professional, Scientific, and Technical Services	1,909	3.96%	24,906	4.52%	0.88
Management of Companies and Enterprises	202	0.42%	6,592	1.20%	0.35
Administrative and Support and Waste Management and Remediation Services	2,634	5.47%	37,010	6.72%	0.81
Educational Services	5,382	11.18%	49,725	9.02%	1.24
Health Care and Social Assistance	6,601	13.71%	131,456	23.85%	0.57
Arts, Entertainment, and Recreation	939	1.95%	9,402	1.71%	1.14
Accommodation and Food Services	7,315	15.19%	68,588	12.45%	1.22
Other Services (except Public Administration)	1,231	2.56%	20,078	3.64%	0.70
Public Administration	1,781	3.70%	35,309	6.41%	0.58

Source: West Virginia Department of Commerce

Overview - Regional Infrastructure

Adequate infrastructure is an essential component of economic development, as it can limit the rate and size of development. Each county is planning or already in the construction phase of projects to bring improved infrastructure to its development areas. Infrastructure projects that will increase quality of life in the region's communities are also planned. Every county and municipality has experienced growth over the last five years, which has created water and sewer infrastructure issues. In addition, the influx of business brings a need for expanded public services such as schools, hospitals, daycare centers, and public safety personnel. Region 9 is working to provide efficient infrastructure and services to businesses and residents, while continuing to develop the local economy.

Improving water, sewer, natural gas, transportation and broadband infrastructure will increase the competitiveness of the local region and will help to meet the needs of the growing population and business environment. All of these public services are necessary to support continued growth and development within the region. Over the past several years, Region 9 and the Hagerstown Eastern Panhandle Metropolitan Planning Organization have developed studies and plans which improves and protects the areas infrastructure and resources. These plans can be found at www.region9wv.com/plans---studies.html and www.hepmo.net

The region has improved communications coverage, including cell phone service and broadband/high-speed Internet access, however achieving optimal internet speeds could be elusive as increased expectations will parallel increased technology. In 2013, Region 9 facilitated the development of a regional broadband strategic plan by conducting a broadband needs assessment in order to gain an understanding of the current broadband environment in the region. The state has also deployed a Broadband Council. Information and interactive maps can be found at <https://broadband.wv.gov>

The quality of a region's infrastructure is critical to its ability to grow and maintain a vibrant economy. Wise investment in infrastructure is considered an economic development activity because it makes the Region more competitive through the creation of jobs and an enhanced quality of life. Investments in industrial parks; a robust multimodal transportation system which includes airports, ground transportation, walking and biking trails; and electrical, water and sewer systems, and solid waste facilities are critical components of the physical infrastructure that supports and fuels the Regional economy.

Business and Industrial Parks

Significance

An inventory of available properties that can accommodate a variety of industries is essential to attracting new employers or retaining existing employers needing to expand.

Current Conditions

Region 9 has 42 business and industrial parks concentrated mainly in Martinsburg, Tabler Station, Charles Town, Kearneysville, and Berkeley Springs.



Trends and Future Needs

The recent location of Proctor and Gamble’s one million plus square feet production facility in Berkeley County and the recent job growth in the Transportation and Warehousing sector indicate that the Region is becoming more competitive in the nation.

The West Virginia Department of Commerce will soon be launching WV READY, a state certified site readiness program to list potential properties for perspective businesses to review. Local development authorities will be eligible to list a variety of sites and may need assistance conducting the research to successfully market their properties and receive state certification.

Strategic Findings

The region’s strong Information based job sector, and proximity to large government, financial, and medical based economies could shift the focus from “traditional” manufacturing based industrial parks to logistics related industrial spaces such as warehousing and high-tech industrial/ office spaces from bioscience, medical and information technology businesses to meet future demands. There will be continued development of business parks that accommodate office, commercial, warehousing and industrial uses.



TABLE 10: INDUSTRIAL PARKS, SITES, AND BUILDINGS IN BERKELEY COUNTY

Type	Name	City	Total Acres	Available Acres
Park	Cumbo Yard Industrial Park	Martinsburg	630.00	202.00
Park	John D. Rockefeller IV Science & Technology Center	Martinsburg	210.00	120.00
Park	Liberty Business Park	Martinsburg	146.00	50.00
Park	Falling Waters Business Center	Martinsburg	74.00	14.00
Park	Tabler Station Business Park	Martinsburg	580.00	580.00
Site	Route 11 @ Dupont Road Site	Falling Waters	54.00	
Site	NE Quadrant Intersection of I-81 and WV Route 51 Site	Inwood	50.00	
Site	BPG Site	Martinsburg	150.00	
Site	Bryarly Manor Orchards Site	Martinsburg	174.00	
Site	Route 11 at Tabler Station Road Site	Martinsburg	70.70	
Site	Willis Site	Martinsburg	40.20	
Site	Talbott Site	Martinsburg	70.00	
Site	Tabler Station Site	Martinsburg	21.00	
Building	1315 Airport Road Facility	Martinsburg	5.70	
Building	750 Baltimore Street Building	Martinsburg	8.40	
Building	Arcadia Aviation Facility	Martinsburg	6.00	
Building	Emivest Hanger and Office Building	Martinsburg	33.00	
Building	IRS Storage Facility	Martinsburg	2.90	
Building	Berkeley Business Park	Martinsburg	76.00	
Building	Shockey Commerce Center	Martinsburg	226.00	
Building	Tiger Building	Martinsburg	7.45	
Building	Tabler Station Warehouse and Distribution Facility	Martinsburg	10.00	

Source: West Virginia Department of Commerce

TABLE 11: INDUSTRIAL PARKS, SITES, AND BUILDINGS IN JEFFERSON COUNTY

Type	Name	City	Total Acres	Available Acres
Park	Sunnyside Business Park	Charles Town	100.00	100.00
Park	Burr Business Park	Kearneysville	460.00	127.40
Site	Chakmakian Bypass Site	Charles Town	90.00	
Site	Boyd-Rinker Site	Halltown	51.50	
Site	Harpers Ferry Site	Harpers Ferry	47.00	
Site	Jefferson Orchards Site	Ranson	400.00	
Site	F.O. Day Site	Kearneysville	184.00	
Site	Blackford Village Site	Ranson	49.50	
Building	Burr Business Center	Charles Town	20.00	
Building	Cold Storage Building No. 2	Charles Town	193.00	
Building	635 McGarry Boulevard	Kearneysville	11.50	
Building	Investors Associates Building	Kearneysville	5.00	
Building	Norm Thompson Building	Kearneysville	15.00	
Building	Kodak Building	Middleway	270.00	

Source: West Virginia Department of Commerce

Airports

Significance

Airports are important components to a regional economy, supporting domestic and international trade.

Current Conditions

The Eastern Panhandle is served by the Eastern West Virginia Regional Airport, a joint public and military use airport located in Berkeley County. The airport is classified as a general aviation airport by the West Virginia Department of Transportation, and provides general aviation services, such as charter flights and aviation aircraft maintenance, for both public and private entities. Although the airport is not served by commercial passenger air service, the airport provides general commercial services such as a flight school, maintenance facility, and charter flight services. The Eastern West Virginia Regional Airport also serves as the home for the West Virginia Air National Guard unit, which uses the hangar facilities to store a 12-aircraft squadron. It has one 8,815-foot runway.

With the ability to handle the largest transport aircraft, the airport could be used to transport the goods that are produced in the region to areas all over the world in a relatively short time frame. In addition, access to an airport would serve as a positive feature when attracting business and industry to the region. With the region's large federal presence, the airport can be used to transport federal officials and contractors directly to the region instead of to one of the airports in Baltimore or Washington, D.C. This airport can provide for future growth by providing passenger service to and from the region and transportation of goods to and from the region. Through the use of the airport, Region 9 has the opportunity to become a major transportation hub.

Trends and Future Needs

The Eastern West Virginia Regional Airport Authority (EWRVRAA) completed a Strategic Business Plan in February 2018 (<http://berkeleywv.org/sharedimg/pdf/airport/280.pdf>). This study identifies trends and future needs; as well as the goals, objectives, and strategies to achieve its vision.



Strategic Findings

The Airport has identified four areas of focus to achieve their vision:

“By 2022, the EWRVRAA will become a Regional General Aviation airport and will continue to drive economic prosperity in the Hagerstown-Martinsburg, MD-WV Metro Area by: developing a domestic commercial air cargo hub; providing cost-competitive and expanded general aviation services and facilities; and continuing support to the WV Air National Guard’s global air cargo operations.”

1. Financial
 - Strengthen Financial Health, Enhance Fiscal Management, Capitalize on Existing Regional Assets
2. Customers & Community
 - Grow General Aviation and Air Cargo Business, Improve Political/Legislative Relationships, Improve Regional Perception and Brand, Maximize Regional Economic Impact
3. Operations/Process
 - Explore Emerging Technologies, Provide for the Timely and Cost-Effective Delivery of Facility Improvements and Expansion, Optimize FBO Services and Facilities Workforce, Attract and Retain Highly Talented and Diverse
4. Workforce
 - Enhance Training and Development, Maintain Organizational Effectiveness

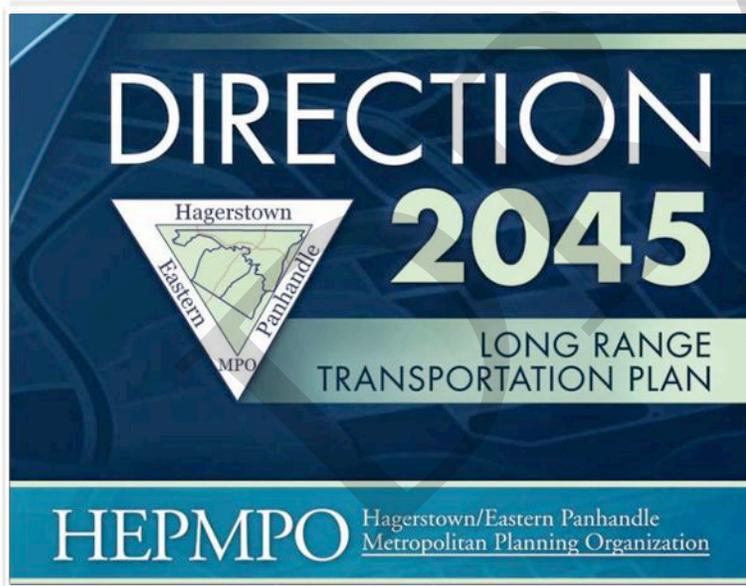
Ground Transportation

Significance

A West Virginia University report by their Bureau of Business & Economic Research (BBER) relies on commuting patterns as a means of organizing counties into economic regions for the county forecasting program. Rather than treating each county as an isolated economic entity, this framework recognizes that economic and demographic changes in one county can influence its neighbors. This concept is relevant to local government and public service agencies, as well.

Current Conditions

The Eastern Panhandle is represented by the Hagerstown Eastern Panhandle Metropolitan Planning Organization (HEPMPO). Region 9 has access to major roadways and interstates that provide a way to transport goods to and from the region. These major roadways and interstates are another significant strength for the region, which in turn present significant economic development opportunities. From an interstate perspective, Region 9 has direct connection to Interstate 81 (I-81), which runs north and south from New York to Tennessee and access to Interstate 70 along the northern border. This major transportation presence makes the region accessible by automotive transport from nearly any area in the United States. In addition, the region is connected by major roadways to Maryland, Virginia, Pennsylvania, and Washington, D.C. Unlike many areas in West Virginia, most of the region is easily accessible by major roadways. This strength must be used as a marketing tool when attracting business and industry to the region.



Trends and Future Needs

The “Roads to Prosperity” Bond was approved in 2017 and a list of upcoming projects funded through this initiative can be found at <https://transportation.wv.gov/highways/programplanning/Documents/Roads%20to%20Prosperity%20Project%20List.pdf>

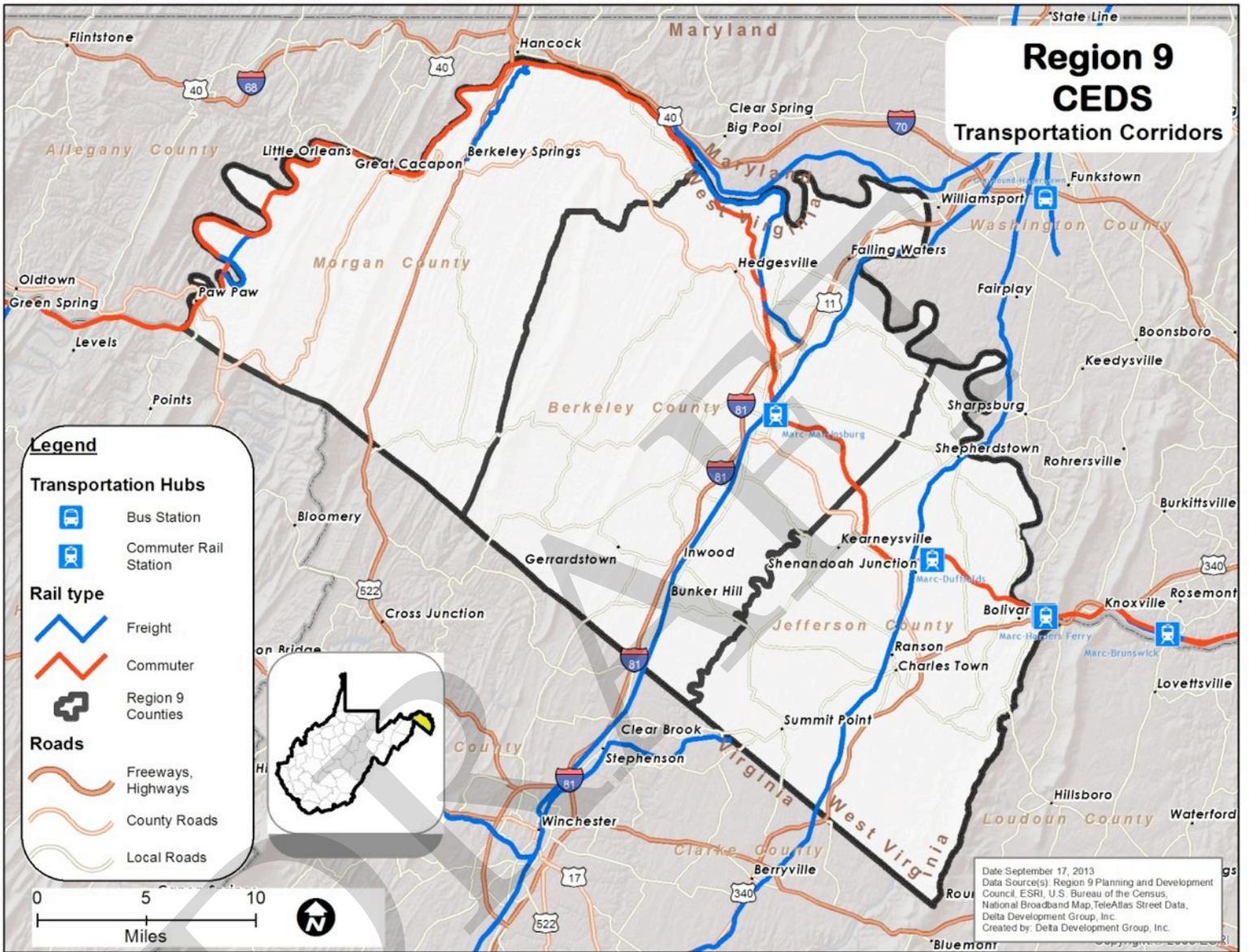
The HEPMPPO adopted its Long Range Transportation Plan in April 2018. It along with other plans and studies which have identified transportation related trends and needs can be found at www.hepmo.net/documents

Interstate 81 is projected to have increased freight volume along its corridor for the next several years, continuous improvements and expansions will need to be made during this time.

Strategic Findings.

Region 9 will provide support where needed to the HEPMPPO, who will be the lead organization for most transportation related project in Berkeley and Jefferson County.

FIGURE 3: TRANSPORTATION CORRIDORS IN REGION 9



Drinking Water, Wastewater, and Stormwater

Significance

As the Region's population continues to grow, opportunities for the development of an increasingly diverse labor force and globally competitive business environment are directly connected to its ability to protect and retain an essential natural resource, Water.

Current Conditions

The Eastern Panhandle is served by the following water and sewer utilities:

- Berkeley County Public Service Water District
- Berkeley County Public Service Sewer District
- City of Martinsburg Water and Sewer Department
- Ranson Sewer Department
- Jefferson County Public Service District
- Charles Town Water and Sewer Utility Board
- Jefferson Utilities Incorporated
- Berkeley Springs Water Works
- Paw Paw Municipal Water Works
- Warm Springs Public Service District
- Paw Paw Sewer System
- Private wells and private septic systems

The City of Martinsburg and Berkeley County Public Service Sewer District are the only Municipal Separate Storm Sewer System (MS4) Permit holders in the region and must be responsible for developing a implementing a stormwater management program and plan.



Trends and Future Needs

A chemical spill in Charleston, WV during 2014, impacted nearly 300,000 residents. After which, The Marshall University Center for Business and Economic Research estimated that the economic impact to be \$19 million for each business day during the "Do Not Use" water order issued, equalling 24 percent of the economic activity the affected area. As a result of the spill the State of West Virginia requires all public drinking water suppliers and utilities to develop and implement Source Water Protection Plans. These utilities may need additional resources to implement strategies in these plans.

Within the Source Water Protection Plans discussed above, on reoccurring strategy within the region is the need to provide expand sanitary service to areas with failing septic systems. In some circumstances, the underlying limestone geology, also known as Karst, found within the Eastern Panhandle allows effluent to enter our groundwater via dissolved conduits within the bedrock. Sanitary utilities must be aware of all and new financing and funding opportunities to provide quality service at reasonable rates. Finally, as the region continues to grow, the sanitary boards must also be mindful of how to achieve their current wasteload allocation (WLA) as their plants begin receiving higher incoming flows.

Growth trends of the City of Charles Town, the City of Ranson, and the Corporation of Shepherdstown are all leading up to a population density threshold considered a Census Urbanized Area. With this designation also comes a possible MS4 permit designation, and upheld by the Clean Water Act. These communities will need to be advised on their options as the 2020 Census approaches.

...Strategic Findings (next page)

Strategic Findings

The preservation of our water resources will not only benefit our existing businesses, but will serve as an assurance to new companies looking to invest in West Virginia and the Eastern Panhandle that their water demands for production will be reliable and clean.

The Eastern Panhandle lies within the Chesapeake Watershed. Other States in the Watershed have implemented trading scenarios, that Region 9 utility districts and boards could model, allowing for options and alternatives to achieve their WLA.

Charles Town, Ranson, and Shepherdstown can work with the Region 9 Environmental Program Coordinator to better understand how to manage the responsibility of an MS4 Permit hold in the years leading up to a possible designation.

Communication Network

Significance

Competitive Broadband and mobile speed is essential to attracting and retaining a variety of businesses and industries to the region and West Virginia.

Current Conditions

The Eastern Panhandle Regional Broadband Strategic Plan can be found at <http://www.region9wv.com/plans---studies.html> The state has appointed a Broadband Council. Detailed information can be found at <https://broadband.wv.gov/>



Trends and Future Needs

Fiber Optic lines can provide proper speeds needed for data centers. The region must continuously improve their communication network.

Strategic Findings/Policy Implications

The region is rich with Information sector jobs and skills with proper broadband infrastructure, the Eastern Panhandle will compete with neighboring states in attracting high-tech companies.

Electric and Energy

Significance

Energy, particularly electricity and natural gas, is a basic and critical component of infrastructure that fuels economic development. Increased availability, diversity of energy sources, and reliability of energy provisions are key to increased economic productivity.

Current Conditions

In the Eastern Panhandle current electrical service is provided by the First Energy Corporation electric companies *First Energy Corp.*

Current gas service is provided by Mountaineer Gas Company, Blueflame, Inc., Thompson Gas.

There are several private renewable energy consultants and installation experts in the region.

Trends and Future Needs

Mountaineer Gas is currently installing a service line across Morgan, Berkeley, and Jefferson Counties. Once the line becomes operational existing businesses may need to gain an understanding of how to gain access and methods on converting their existing systems to a natural gas fuel. Emergency services may need training on responding to Natural gas related calls.

Energy Efficiency programs improve utility system reliability, promotes local economic development, energy affordability, and resilience.

Strategic Findings

The continued support of the development of energy diversity and redundancy will establish resiliency in the Eastern Panhandle.

Solid Waste

Significance

The management of waste streams are critical to quality of life and economic development, as open dumps and roadside litter can present a strain on natural resources. Landfill capacity could limit disposal options for industry operations.

Current Conditions

Curbside pickup is provided by the the municipal corporations or by other private businesses outside the corporate boundaries. Currently, there are three landfills that receive municipal solid waste (MSW). The LCS Services landfill in Berkeley County, north of Hedgesville is one disposal point for Berkeley County generated MSW. Private haulers also transport MSW to landfills in nearby Pennsylvania.

Some Municipalities and private haulers provide curbside recycling, plus there are several recycling transfer centers located throughout the region. Three in Berkeley County, 1) South Berkeley Pilgrim Street 2) Martinsburg Grapevine Road, 3) Hedgesville Eagle Plaza. One in Jefferson County - Jefferson Orchard Rd Kearneysville. One in Morgan (The Charles R. Biggs Recycling Center is located approximately three miles south of Bath on US 522).

The Rehabilitation Environmental Action Plan (REAP) operates a state wide litter collection program involving the public called Adopt-A-Highway. The program allows groups to voluntarily agree to collect litter in 2-3 mile increments of any road within the county twice per year.



Trends and Future Needs

The County Solid Waste Authorities routinely conduct Comprehensive Litter and Solid Waste Plans. These plan highlight many trends and needs in the County and region as a whole.

Current growth trends and future land use patterns have been making it more difficult to site new or expand existing landfills. However, in 2013 the issuance of a Certificate of Site Approval for the EntSORGA Mixed Waste Processing Resource Recovery Facility was granted and construction is ongoing near the Grapevine Road transfer station in Berkeley County.

Strategic Findings

Region 9 will assist, when feasible, with implementing strategies in the county comprehensive plans.

Berkeley County Solid Waste Authority Comprehensive Litter and Solid Waste Plan <http://berkeleywv.org/sharedimg/bcswa/29.pdf>

Jefferson County Solid Waste Authority Comprehensive Litter and Solid Waste Plan <http://www.jcswa.com/board/downloads-2/files/JCSWA%20Comp%202016%20Updates.pdf>