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INTRODUCTION

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. The CEDS for 2014 – 2018 has taken an innovative approach to economic development in the region. This plan assures that:

- the economic goals and objectives for the region are clearly defined;
- action plans have been established to accomplish each goal; and,
- Performance metrics are in place to ensure that the outcomes of the plan can be measured.

West Virginia's Region 9 is a geographic area consisting of three rural counties in the northeast area of West Virginia: Berkeley, Jefferson, and Morgan. Region 9 is home to over 177,208 residents and borders the states of Maryland and Virginia. The region is approximately 90 miles from Washington, D.C., and the surrounding metropolitan area, one of the most populated metropolitan regions in the county. Due to this ideal location, the region enjoys some of the economic benefits of a major metropolitan region, while offering the more rural lifestyle and living costs of West Virginia.

The Region 9 CEDS is a five-year economic plan to guide growth of jobs, development, and commerce in region. The process for developing the CEDS was built on local and broad-based input and guidance, as well as the integration of economic development planning. The CEDS focuses on new strategies and action steps to greatly enhance the region's economic opportunities.

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 improving the economic competitiveness and quality of life opportunities for the region. As background for the findings presented, this report includes the following:

- An existing conditions report, including conditions of regional infrastructure, commerce, and transportation; a socioeconomic profile of the region; and employment and job trends.
- Findings from community and private sector participation, including an analysis of regional strengths, opportunities, aspirations, and results.
- A regional vision statement and set of goals and objectives concerning infrastructure; economic and workforce development; and balancing tourism and recreation with preserving quality of life, the environment, and marketing for the region.

REGION 9 COUNCIL

COUNCIL MISSION

The Eastern Panhandle Regional Planning and Development Council (Region 9 Council) 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.

The Region 9 Council 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 as follows:

- 1) All municipalities and all counties within the region shall be represented on the Council.
- 2) The county representative shall be the president of the County Commission or a member of the County Commission designated by him/her, in writing.
- 3) The municipal representative shall be the mayor or an elected member of the governing body designated by him/her, in writing.
- 4) The number of members serving shall comprise not less than fifty-one percent (51%) of the total number of members.
- 5) The terms of office of the members of the Council who serve shall be concurrent with their terms of office.

The principal community and regional interests shall be further represented by the appointment of additional members of the Council.

- 1) Regional Council members serving as elected officials shall select additional members to serve on the Council to represent principal community or regional interests, including, but not limited to: commerce, industry, labor, agriculture, education, health, and any such interests as may be required by federal law and regulations. The selection of such members shall also provide for reasonable representation of geographic, economic and ethnic groups without exclusion of significant minority groups.
- 2) Subsequent changes in the designation of representatives shall be determined by the Council.
- 3) The number shall not exceed forty-nine percent (49%) of the total number of members.
- 4) The Executive Committee of the Council will annually accept, reject, suggest changes to, or renew the non-elected members chosen by local governments.

The region includes three (3) counties and nine (9) municipalities. Therefore, 12 members of the Council are elected officials, one from each of the local governments. Eleven (11) non-elected members represent various segments of regional interests so that the Council is made up of 23 total members. Membership is distributed among the three counties in an approximation of population distribution.

Membership on the Council has been apportioned as follows:

Berkley County – 11 total members; 8 non-elected and 3 elected

Jefferson County – 7 total members; 1 non-elected and 6 elected

Morgan County – 5 total; 2 non-elected and 3 elected

Each member is entitled to one vote on all matters brought before the Council. In order to submit a vote, the member must be present at the meeting where the vote is taken.

The following is a list of the current Region 9 Council membership.

BERKELEY COUNTY

Council Person James Barnhart (Elected – Berkeley County Council)

Guy Avey, III (Berkeley County Appointee)

Kathy Mason (Berkeley County Appointee)

Stephen Christian (Berkeley County Appointee)

Neil McLaughlin (Berkeley County Appointee)

Delegate John Overington (Berkeley County Appointee)

Chris Strovel (Berkeley County Appointee)

Mayor Mary Sue Catlett (Elected – Town of Hedgesville)

CITY OF MARTINSBURG

Mayor George Karos (Elected – City of Martinsburg)

Mark Baldwin (Appointee – City of Martinsburg)

Catherine Wilkes (Appointee – City of Martinsburg)

JEFFERSON COUNTY

Commissioner Patsy Noland (Elected – Jefferson County Commission)

John Reisenweber (Jefferson County Appointee)

Mayor Greg Vaughn (Elected – Corporation of Harpers Ferry)

Mayor Jim Auxer (Elected – Corporation of Shepherdstown)

Mayor David Hamill (Elected – City of Ranson)

Mayor Robert Hardy (Elected – Corporation of Bolivar)

Mayor Peggy Smith (Elected – City of Charles Town)

MORGAN COUNTY

Commissioner Stacy Dugan (Elected – Morgan County Commission)

VACANT (Morgan County Appointee)

Louis Herrell (Morgan County Appointee)

Mayor Susan Webster (Elected – Town of Bath)

David Clark (Elected – Appointee for Mayor Alton Wolfe, Jr. – Town of Paw Paw)

EXISTING CONDITIONS

This analysis will review the current economic conditions in Region 9 with respect to trends in infrastructure, commerce, transportation, socioeconomics, and employment.

INFRASTRUCTURE

Adequate infrastructure is an essential component of economic development, as it can limit the rate and size of development. Region 9 has 42 business and industrial parks concentrated mainly in Martinsburg, Charles Town, Kearneysville, and Berkeley Springs. 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 significant 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 and continuing to develop the local economy.

Region 9 does not have adequate communications coverage, including cell phone service and broadband/high-speed Internet access. This severely limits the growth potential for businesses. Figure 1 displays the broadband coverage areas by type in Region 9. 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 resulting plan provided a three-prong approach that includes education and outreach, economic development, and infrastructure. Incorporating broadband into the economic development planning process ensures that the necessary infrastructure is in place to help current businesses expand and attract new businesses.

Improving water, sewer, and broadband infrastructure will increase the competitiveness of the local market 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 Region 9.

WATER AND SEWER SERVICE PROVIDERS

- 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 Department
- Jefferson Utilities Incorporated
- Berkeley Springs Water Department
- Paw Paw Municipal Water Works
- Warm Springs Public Service District
- Paw Paw Sewer System

- Private wells and private septic systems

RECYCLING AND SOLID WASTE SERVICE PROVIDERS

- Apple Valley Waste
- Waste Management
- Morgan County Solid Waste Authority
- Jefferson County Solid Waste Authority
- Berkeley County Solid Waste Authority
- LCS Waste Services Landfill

ELECTRICITY PROVIDERS

- Millers Electric Company, Inc.
- Allegheny Power

PHONE/CABLE/INTERNET SERVICE PROVIDERS

- Comcast
- Frontier Communications
- Verizon

GAS SERVICE PROVIDERS

- Mountaineer Gas Company
- Blueflame, Inc.
- Thompson Gas

HOSPITALS

The University Healthcare system brought together Berkeley Medical Center (formerly City Hospital), Jefferson Medical Center (formerly Jefferson Memorial Hospital), and University Healthcare (formerly WVU Hospitals-East) to form a new healthcare system for Region 9. The merger took place in 2005 and the official name change took effect on May 13, 2013. The name change was implemented to reflect the strong affiliation with WVU Healthcare in Morgantown and West Virginia United Health System. The 2005 merger of WVU Healthcare (located in Morgantown), City Hospital, and Jefferson Memorial Hospital made possible the addition of new specialties and the expansion of services, including more satellite family medicine clinics, modernized emergency departments, and the addition of cardiac services, cancer treatment services, and other specialty services.

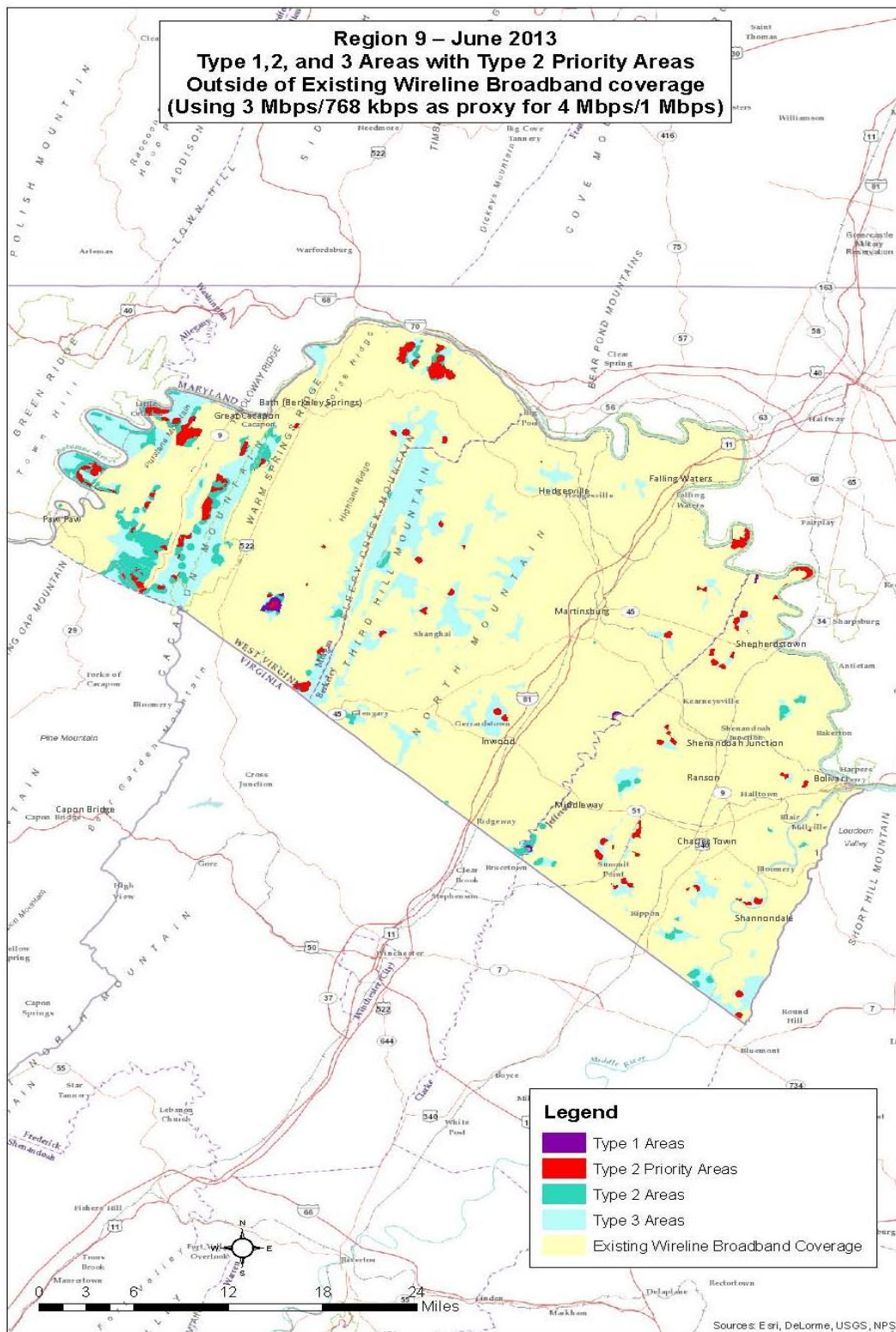
Valley Health serves the healthcare needs of northern Virginia, as well as parts of West Virginia and Maryland. Valley Health was incorporated in 1994 when Winchester Medical Center and Warren Memorial Hospital partnered to serve the region. It now operates six hospitals, including War Memorial Hospital in Morgan County. Valley Health began managing War Memorial Hospital in 1989 and acquired the hospital in 2010. War Memorial Hospital is federally designated as a Critical Access Hospital. Outpatient services include general and specialty surgical services, an emergency department, a digital medical imaging department, cardiac rehab, and an outpatient rehabilitation and wellness facility. Facilities in Region 9 include:

- Berkeley Medical Center-Martinsburg, Berkeley County
- Jefferson Medical Center-Ranson, Jefferson County
- War Memorial Hospital-Berkeley Springs, Morgan County

BROADBAND

See following map.

FIGURE 1: BROADBAND AREAS IN REGION 9



INDUSTRIAL PARKS AND COMMERCE CENTERS

Tables 1, 2, and 3 show industrial parks, sites, and buildings in Berkeley, Jefferson, and Morgan Counties. Industrial parks in Region 9 represent both public and private lands that are planned, subdivided, and improved in order to efficiently and effectively serve industrial development. An industrial site can consist of land that contains no development amenities and has no land use restrictions or it could be a parcel of full-utility served land, given industrial/commercial development authority by respective permitting agencies. Many industrial sites in Region 9 are privately owned properties within industrial/commercial land use zone categories, or on land that has no zoning. Industrial sites usually have specific zoning designations, while industrial parks and buildings often do not. An industrial building is one building with all industries and businesses located inside the building.

The tables also display the total acres and available acres for each industrial park, site, and building. Although not all information is available for available acres, most industrial parks, sites, and buildings are not full. The industrial sites, parks, and buildings vary from only a few acres to 630 acres. Berkeley County has the most industrial parks, sites, and buildings, followed by Jefferson County, and then Morgan County. This follows their population size patterns as well.

TABLE 1: 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 2: 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

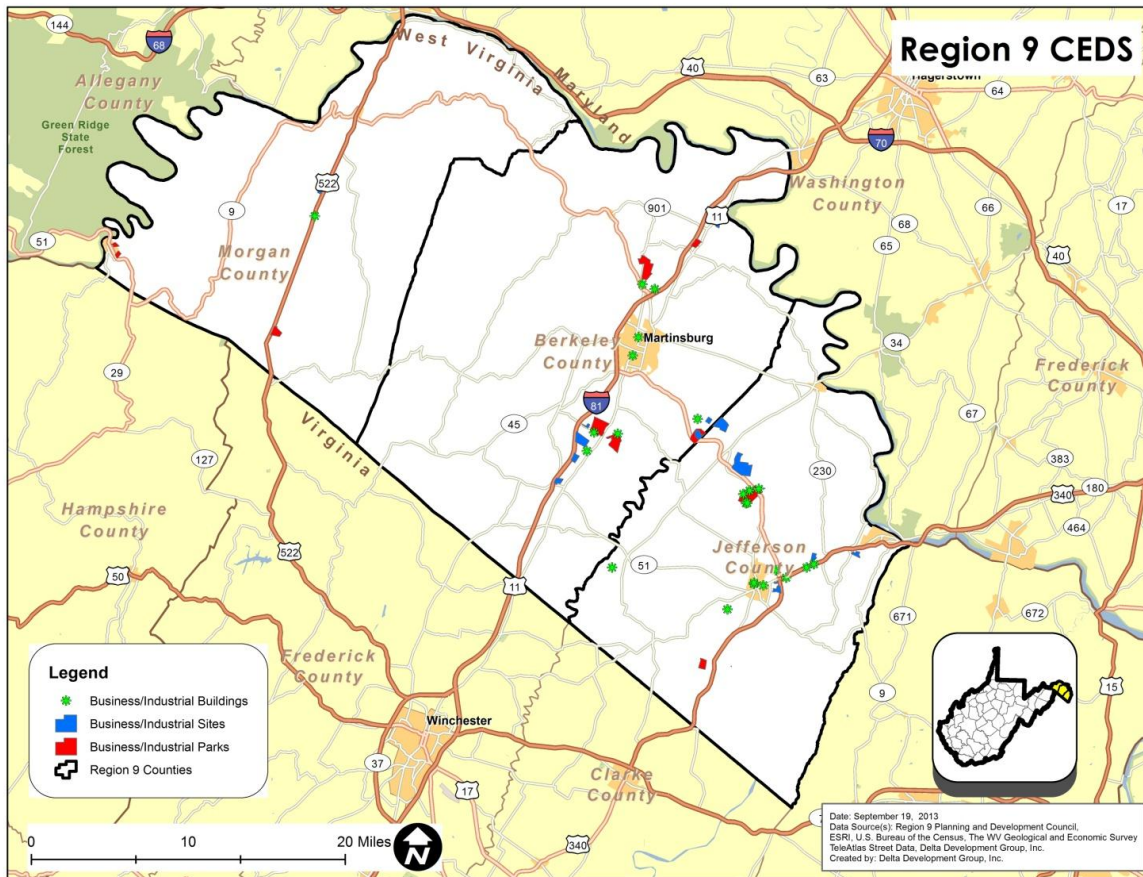
TABLE 3: INDUSTRIAL PARKS, SITES, AND BUILDINGS IN MORGAN COUNTY

| Type | Name | City | Total Acres | Available Acres |
|----------|------------------------------------|------------------|-------------|-----------------|
| Park | 522 Business Park | Berkeley Springs | 142.00 | 77.90 |
| Park | Wolfe Route 9 Industrial Park | Paw Paw | 30.00 | 25.00 |
| Park | Robert C. Byrd Industrial Park | Paw Paw | 30.00 | 14.40 |
| Site | Shirley Farms West Site | Berkeley Springs | 63.70 | |
| Building | Vanguard Multi-Tenant Building | Berkeley Springs | 10.00 | |
| Building | Office Equipment Services Building | Paw Paw | 10.90 | |

Source: West Virginia Department of Commerce



FIGURE 2: BUSINESS/INDUSTRIAL SITES IN REGION 9



MOVEMENT OF GOODS AND PEOPLE

The Eastern Panhandle has a vast array of transportation assets that many other areas of West Virginia do not have. Region 9 has direct access to an airport, an extensive rail system, commuter trains, numerous roadways and interstates, and public bus transportation.

MOVEMENT OF GOODS

FIGURE 3: POPULATION WITHIN 200 MILES

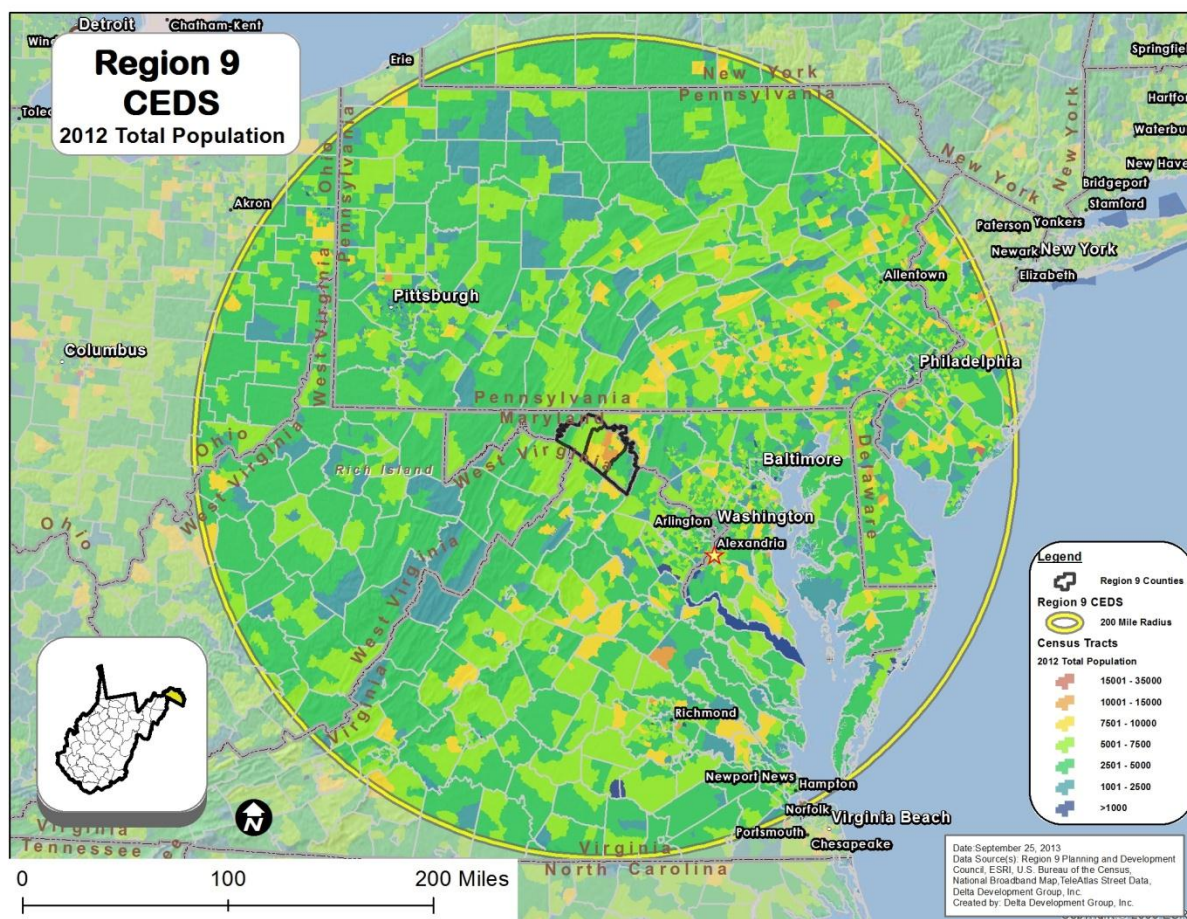


Figure 3 displays the population located within a 200-mile radius of Region 9. In 2013, over 31 million people and 12 million households were located within this radius (see Exhibit A for a demographic and income profile for this radius). Region 9 is located near the Washington, D.C., metropolitan area, one of the most populated metropolitan regions in the country. Utilizing the transportation options for transporting goods gives companies located in Region 9 access to a wide variety of potential customers.

RAIL

The West Virginia State Rail Authority under the West Virginia Department of Transportation facilitates railroad transportation and commerce in the state. West Virginia was the first state in the nation to both own and operate a commercial freight railroad. Rail transportation has been a staple of commerce in Region 9 since the late 19th Century and it continues to support an extensive rail system that can be used to transport goods to and from the region around the nation.

The West Virginia rail system is comprised of two Class I railroads and 11 short line or regional railroads throughout the entire state. The system contains 2,401 route miles of track. CSX Transportation Inc. (CSX Transportation), the operating company under CSX Corporation Inc., is West Virginia's largest carrier with 1,113 route miles of track. Norfolk Southern Railway (Norfolk Southern) is next in size with 801 route miles of track. Short lines and regional roads make up the remaining 487 route miles of track.

CSX TRANSPORTATION INC.

CSX Corporation Inc. is one of the nation's leading transportation suppliers. The company's rail and intermodal businesses provide rail-based transportation services, including traditional rail service and the transport of intermodal containers and trailers. Overall, the CSX Transportation network encompasses about 21,000 route miles of track in 23 states, the District of Columbia, and the Canadian Provinces of Ontario and Quebec. Although CSX Transportation does not currently have any stops within the Region, there is a potential opportunity for rail sidings in this location in the future. CSX's transportation network serves some of the largest population centers in the nation. CSX Transportation also serves thousands of production and distribution facilities through connections to more than 240 short line and regional railroads. CSX Transportation transports a broad portfolio of products ranging from coal and new energy sources, such as biodiesel and ethanol, to automobiles, chemicals, military equipment, and consumer products. CSX Transportation operates an average of 1,350 trains per day, transports an average of 20,000 carloads per day, and transports more than 6 million carloads of products and raw materials a year. In addition to its physical track structure, CSX Transportation operates numerous yards and terminals. These serve as the hubs between CSX Transportation and its local customers and as sorting facilities where railcars often are received, resorted, and placed onto new outbound trains.

Commodities moved on CSX Transportation's rail system include:

- Agricultural products
- Automotive
- Bioenergy
- Building materials
- Chemicals and fertilizer
- Coal
- Consumer products
- Food
- Machinery
- Metals
- Military
- Minerals
- Oil, gas, and drilling materials
- Paper, pulp, and fiber products
- Transportation equipment
- Waste



NORFOLK SOUTHERN RAILWAY

Norfolk Southern operates over 20,000 route miles in 22 eastern states. The railroad is mostly used for transporting coal. Norfolk Southern has the most extensive intermodal network in eastern North America.

Norfolk Southern passes through Region 9, but does not have any stops. The Crescent Corridor, operated by Norfolk Southern, is a key north/south corridor that provides intermodal freight service between the Southeast United States and New England. The Crescent Corridor parallels the I-81 corridor, passing through Charles Town and Shepherdstown in Jefferson County.

WINCHESTER & WESTERN RAILROAD CO.

Winchester & Western Railroad Co. (Winchester & Western) operates 54 miles of railroad through Berkeley County, WV, as a route from Frederick County, VA, to Washington County, MD. Winchester & Western connects to CSX Transportation and Norfolk Southern carriers.

TABLE 4: BERKELEY COUNTY ACTIVE RAIL LINES

| Railroad | Starting Point | Ending Point | Line Name |
|-------------------------------------|------------------|--|------------------------|
| Amtrak | Washington, D.C. | Chicago, IL (with stop at Martinsburg, WV) | Capital Limited |
| CSX Transportation | Cumberland, MD | Martinsburg, WV | Cumberland Subdivision |
| MARC | Martinsburg, WV | Washington, D.C. | Brunswick line |
| Winchester and Western Railroad Co. | Winchester, VA | Hagerstown, MD (with stop at Martinsburg, WV) | Only W&W line |

Source: West Virginia Department of Transportation

TABLE 5: JEFFERSON COUNTY ACTIVE RAIL LINES

| Railroad | Starting Point | Ending Point | Line Name |
|--------------------|-------------------|--|------------------------|
| Amtrak | Washington, D.C. | Chicago, IL (with stop at Harpers Ferry, WV) | Capital Limited |
| CSX Transportation | Harpers Ferry, WV | Strasburg Junction, VA | Shenandoah Subdivision |
| MARC | Martinsburg, WV | Washington, D.C. (with stops at Harpers Ferry, WV and Duffields, WV) | Brunswick line |

Source: West Virginia Department of Transportation

Morgan County does not have any active rail line stops. CSX Transportation has a rail line that passes through Morgan County, but no rail sidings are located in Morgan County.



MOVEMENT OF PEOPLE

With Region 9's relatively close proximity to Washington, D.C., there are some residents who commute to the nation's capital for employment. Therefore, public transportation via commuter train and bus is important for reducing greenhouse gas emissions, as well as traffic. Region 9's commuter train and bus systems must be marketed to potential business and industry as it shows the region's ability to provide transportation to workers who might not otherwise have such access and offer a larger selection of employment opportunities that may be farther away.

AMTRAK

Amtrak, also known as the National Railroad Passenger Corporation, was created in 1971. The name "Amtrak" is the blending of the words "America" and "track." During Fiscal Year 2012-2013, Amtrak had more than 31.6 million passengers, the largest annual total in its history. Ridership has increased each year since 2000, except between 2002-2003 and 2009-2010. Every day, an average of more than 85,000 passengers ride more than 300 Amtrak trains nationwide. It is the nation's only high-speed, intercity passenger rail provider, operating at a top speed of 150 mph (241 kph).

Amtrak has two locations in West Virginia: Harpers Ferry and Martinsburg. During the 12 months between October 1, 2012, and September 30, 2013, there were 6,287 boardings and alightings at the Harpers Ferry location, an increase of 804 from the previous year. That same year, there were 9,331 boardings and alightings at the Martinsburg location, an increase of 690 from the previous year. This increase in use of Amtrak's Martinsburg and Harpers Ferry stations has contributed to an increase in overall Amtrak use in West Virginia for the past three years. Amtrak spent \$1,348,964 on goods and services in West Virginia in Fiscal Year 2012. At the end of 2012, Amtrak employed 45 West Virginia residents, with total wages of Amtrak employees living in West Virginia equaling \$3,365,923.

Amtrak's "Capital Limited" operates daily between Washington, D.C., and Chicago. It passes through West Virginia's Eastern Panhandle with stops in Harpers Ferry and Martinsburg.

Station locations, route descriptions, prices, and schedules are available on Amtrak's website (<http://www.amtrak.com/home>).

MARYLAND AREA REGIONAL COMMUTER TRAIN

The Maryland Area Regional Commuter (MARC) Train provides services in Berkeley and Jefferson Counties. MARC Train service is operated under contract with Amtrak and CSX Transportation. The MARC Train provides residents with the option to travel into the Washington, D.C., metropolitan area. The Brunswick line of the MARC Train goes from Martinsburg, WV, to Union Station in D.C., with 18 stops along the way, including Duffields, WV, and Harpers Ferry, WV. The total, one-way trip time is approximately two hours and includes stops in Martinsburg, Duffield, and Harpers Ferry in West Virginia, as well as several stops throughout Maryland, before finally entering Union Station. One-way fare is \$12 for Berkeley and Jefferson County commuters and service is provided Monday through Friday during peak commute times. In October 2007, the Brunswick line reported 7,000 average daily commuters. Between 2007 and 2012, the Brunswick line grew 1.7% in ridership per year. During this time, MARC improved and expanded the storage facility at Martinsburg, which allowed for the reassignment of a train set from Brunswick and created a new frequency in the morning commute. Currently, several stations are at capacity. The Brunswick line's five-year plan for the future includes lengthening existing trains to accommodate growing ridership, maintaining a 94%-95% on-time performance, expanding utilization of systems to increase connectivity, developing system uniformity standards, installing



additional bike racks/lockers at stations, and increasing Electric Vehicle (EV) chargers available to riders, among others. Other route descriptions, prices, and schedules are available on the Maryland Department of Transportation's Maryland Transit Administration website (<http://mta.maryland.gov/marc-train>).

FIGURE 4: MARC TRAIN SERVICE



Bus

The Eastern Panhandle Transit Authority (PanTran) provides bus service for the region which transports residents to their closest MARC Train stations and to other locations around the region. As a result of the continued population explosion in the Panhandle, PanTran was designated as an urbanized public transportation provider. As such, they have been designated as a direct recipient of Federal Transit Administration (FTA) funding for maintenance and expansion of services. Route descriptions are available on PanTran's website (http://www.pantran.com/?page_id=19).

The PanTran Charles Town route provides services between Harpers Ferry and Charles Town. There are also several PanTran routes in Martinsburg, including service to the Veterans Administration (VA) Hospital and other points in Berkeley County. Bus zones include Martinsburg, Berkeley County, Jefferson County, and Harpers Ferry/Bolivar. PanTran buses run from 5:00 a.m. until 8:20 p.m. Monday through Friday, from 8:00 a.m. until 5:30 p.m. on Saturdays, and no service on Sundays. PanTran bus tickets are available for only a few dollars per ride. Half-fare PanTran cards are available for senior citizens age 60 and over, anyone who holds a Medicare Card, or any person with a verifiable disability. Holders of the PanTran half-fare cards will receive a 50% discount on cash fare transactions systemwide on all PanTran routes during all regular operating hours. PanTran's fleet consists of 12 vehicles that serve 16,436 annual passenger trips Monday through Friday, with reduced hours on Saturday. Buses with lifts to accommodate wheelchairs are also available. In addition, PanTran offers a Demand Response service, which is a door-to-door service available to people who live between 3/4 and 1 and 1/2 miles from fixed routes, and to people living in parts of Hedgesville and Inwood. Residents must reserve this service at



least 24 hours in advance. However, since this service is only offered between 8:00 a.m. and 5:00 p.m., residents who may need this service to travel to and from work may not have a commute time within this time frame.

MOVEMENT OF BOTH GOODS AND PEOPLE

ROADWAYS AND INTERSTATES

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 is connected by Interstate 81 (I-81), which runs north and south from New York to Tennessee. 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 encouraging business and industry to come to the region.

The roadways in Region 9 include:

- I-81 connecting north and south from New York to Tennessee
- Route 522 connecting Maryland, West Virginia, and Virginia
- Route 340 connecting West Virginia to Maryland
- Route 9 connecting Region 9 to Virginia and Maryland
- Route 480 connecting Shepherdstown to Kearneysville

BERKELEY COUNTY HIGHWAY NETWORK

- U.S. Route: 11
- Interstate: 81
- State Routes: 9, 45, and 51

JEFFERSON COUNTY HIGHWAY NETWORK

- U.S. Route: 340
- State Routes: 9, 45, 51, 115, 230, and 480

MORGAN COUNTY HIGHWAY NETWORK

- U.S. Route: 552
- State Route: 9

Although Interstate 70 (I-70), which runs east and west from Maryland to Utah, is not in the region, it also plays an important role in the transportation network for Region 9.

ROAD CONDITIONS AND TRAFFIC

The 2035 forecast, as discussed in the *2010 through 2035 Long-Range Multimodal Transportation Plan Update* for the Hagerstown/Eastern Panhandle Metropolitan Area, shows that the interstates (I-81 and I-70) and U.S. Route 340 (US 340) carry a majority of the region's through traffic. In Berkeley County, 16% of the total vehicle miles traveled can be attributed to through traffic (29% of I-81). In Jefferson County, 12% of the total vehicle miles traveled can be attributed to through traffic (17% of US 340).



traffic). In Berkeley County, 24% of regional through traffic was attributable to freeway travel, with a minimal percentage from arterial (*high-capacity, urban road*) and local roads in 2008, which is projected to increase to 29% by 2035. In Jefferson County, 15% of regional through traffic was attributable to arterial travel, with 4% due to local roads in 2008, which is projected to increase to 18% by 2035. Additionally, Jefferson County has a fairly high level of multimodal travel, as only 72% of commuters drive alone, which is 4% below the national average. Table 6 provides additional data on the number of vehicle miles traveled in Region 9.

As for road conditions, 21% of lane miles in Berkeley County are deficient, and 10% of lane miles in Jefferson County are deficient with no overcapacity Level of Service (LOS). Ninety-seven-lane miles in the urbanized areas of Jefferson and Berkeley Counties have an LOS of E or lower, “bad conditions with heavy traffic above roadway capacity, with speeds severely reduced” or “extremely bad conditions with heavy traffic above roadway capacity, with congestion limit speeds to ‘stop-and-go’ conditions.” The following roadway segments are considered deficient: the majority of four-lane I-81 segments to both the north and south of Martinsburg; Route 9 from Hedgesville to the US 340 Bypass in Jefferson County; WV 45 Apple Harvest Drive; US 340 in Harpers Ferry; US 340 just east of the US 340/WV 9 Bypass; and Queen Street (WV 9/WV 45)/Edwin Miller Boulevard in downtown Martinsburg. Jefferson County has fairly good road conditions; only 21 lane miles in Jefferson County are deficient. The majority of lane miles (86%) in the urbanized areas of Jefferson County are operating at an LOS of C or better, “fair to excellent conditions with moderate to light traffic and a decline in free flow speeds to free flow speeds.” There are no roadway segments in Jefferson County exhibiting an LOS of F, “extremely bad conditions with heavy traffic above roadway capacity, with congestion limit speeds to ‘stop-and-go’ conditions,” and only 10% of lane miles had an LOS of E, “bad conditions with heavy traffic above roadway capacity, with speeds severely reduced.” Lane miles in Berkeley County are much more evenly distributed across LOS grades than in Jefferson County. In Berkeley County, 86 lane miles (23%) have an LOS of A or B, “good or excellent conditions with light to moderate traffic and free or mostly free flow speeds,” while 76 lane miles (21%) in the urbanized areas are considered congested and deficient with an LOS of E or F, “bad or extremely bad conditions with heavy traffic above roadway capacity, and speeds severely reduced or ‘stop-and-go’ conditions.” Table 7 provides additional data on the vehicle hours of delay during period periods.

TABLE 6: DAILY VEHICLE MILES TRAVELED

| County | 2008 VMT (Millions) | 2035 VMT (Millions) | % Change |
|--|------------------------|------------------------|----------|
| Berkeley | 2.52 | 3.71 | +47% |
| Jefferson | 1.15 | 1.74 | +51% |
| Hagerstown/Eastern Panhandle Metropolitan Area | 8.44 | 11.80 | +40% |

Source: 2010 through 2035 Long-Range Multimodal Transportation Plan Update for the Hagerstown/Eastern Panhandle Metropolitan Area

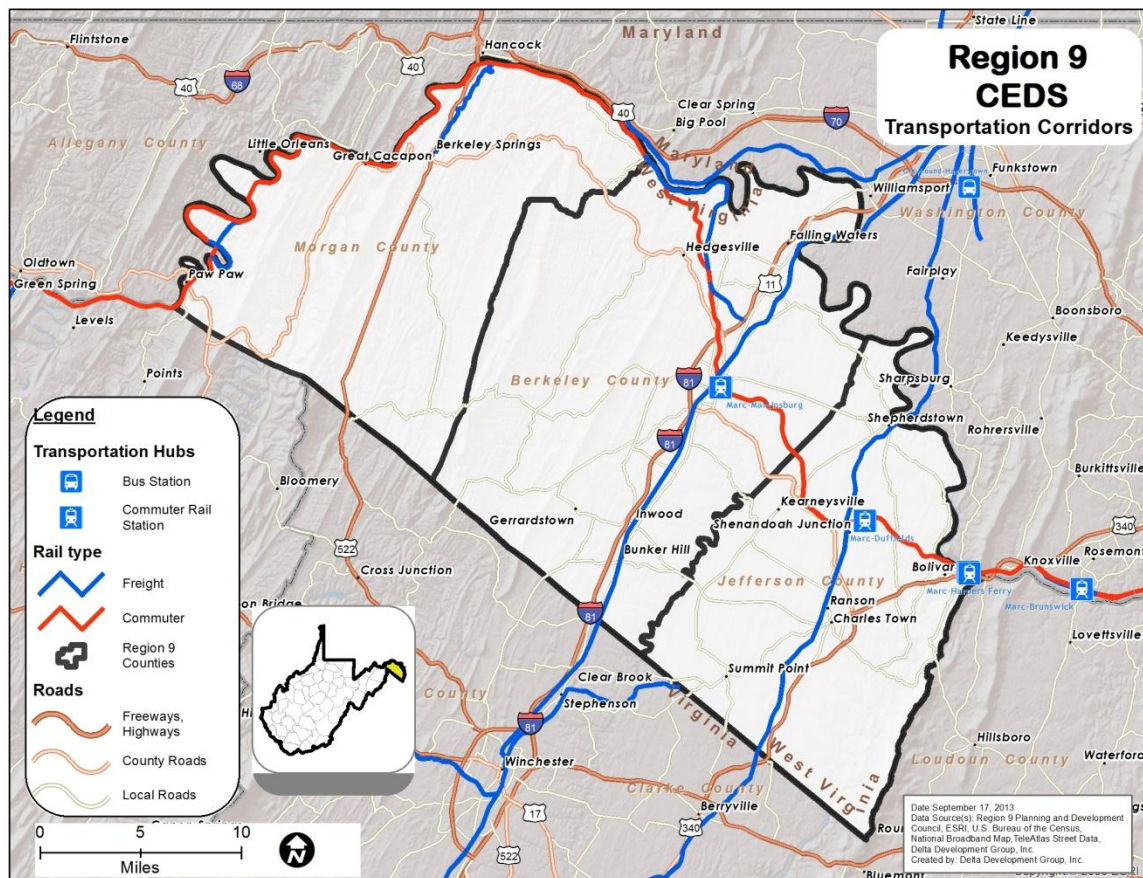
TABLE 7: DAILY PEAK-PERIOD VEHICLE HOURS OF DELAY BY COUNTY

| County | 2008 Delay | 2035 Delay | % Change |
|--|---------------|------------|----------|
| Berkeley | 1,200 | 3,300 | +175% |
| Jefferson | 500 | 1,100 | +120% |
| Hagerstown/Eastern Panhandle Metropolitan Area | 3,000 | 8,200 | +173% |

Source: 2010 through 2035 Long-Range Multimodal Transportation Plan Update for the Hagerstown/Eastern Panhandle Metropolitan Area



FIGURE 5: TRANSPORTATION CORRIDORS IN REGION 9



AIRPORTS

BERKELEY COUNTY: EASTERN WEST VIRGINIA REGIONAL AIRPORT

The Eastern West Virginia Regional Airport is 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 serves 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 7,815-foot runway and 52,750 aircraft operations, landings, and takeoffs, which average 144 per day. The airport has the capacity to handle the largest aircraft in service. Landing fees are based on weight of the plane, with additional fees for hangar rentals.

The airport currently has four on-site business tenants, including a fixed-base operator (FBO) and maintenance service run by Aero-Smith, Inc. Howard Aircraft also offers aircraft maintenance. In addition, there is a flight training center, Aero-Smith Flight Center. Eastern West Virginia Regional Airport also offers on-site car rentals through Enterprise Rent-A-Car. These services make Eastern West Virginia Regional Airport an attractive airport for public and private entities in the region.

The Eastern West Virginia Regional Airport received \$150,000 as part of a \$6 million federal funding award through the Federal Aviation Administration (FAA). Awarded in August 2013, the money will go toward the rehabilitation of the airport's taxiway. This is the top priority for the airport's new capital improvement plan. Also listed in the plan are the results of a noise capability study for the C-17 Globemaster transport planes. Through this study, it was determined that in late 2014, the West Virginia Air National Guard 167th Airlift Wing will begin replacement of the C-17 Globemaster transport planes with C-5 Galaxy transport planes.

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. Region 9 has the opportunity to become a major transportation hub through the use of the airport.

FIGURE 6: EASTERN WEST VIRGINIA REGIONAL AIRPORT



Source: Eastern West Virginia Regional Airport website

MORGAN COUNTY: BUZZARDS GAP ULTRALIGHT FLIGHTPARK

The Buzzards Gap Ultralight Flightpark is located in Berkeley Springs, WV. It is privately owned and use is by permission only. It has a paved runway that can accommodate small jets.

OTHER REGIONAL AIRPORT: HAGERSTOWN REGIONAL AIRPORT

The Hagerstown Regional Airport in Washington County is similar to the Eastern West Virginia Regional Airport. Both are classified as general aviation airports and provide general aviation services, such as charter flights and aviation aircraft maintenance for both public and private entities. The Hagerstown Regional Airport also provides limited commercial passenger air service. Allegiant Air operates two flights per week to Orlando, FL, on Mondays and Fridays, and Cape Air provides daily commercial service, operating four daily flights to the Baltimore-Washington International Airport. In addition to commercial air service, the Hagerstown Regional Airport also hosts an aircraft inspection service and maintenance facility. The Hagerstown Regional Airport is served by two runways: a primary runway that is 7,000 feet long and a secondary runway 3,160 feet in length.

OTHER MAJOR AIRPORTS NEARBY: DULLES INTERNATIONAL, REAGAN NATIONAL, AND BALTIMORE-WASHINGTON INTERNATIONAL

There are also three major national and international airports close to the region:

- Washington Dulles International Airport in Dulles, Virginia (about 50 miles from Region 9)
- Ronald Reagan Washington National Airport in Arlington County, Virginia (about 70 miles from Region 9)
- Baltimore/Washington International Thurgood Marshall Airport in Anne Arundel County, Maryland (about 80 miles from Region 9)

Washington Dulles International Airport in Dulles (Dulles International) serves over 22 million passengers a year, with more than 60,000 passengers passing through Dulles International to and from more than 125 worldwide destinations. Dulles International's terminal complex consists of a main terminal and two midfield terminal buildings, with 123 gates and 16 hardstand locations throughout the entire terminal complex. Dulles International serves dozens of passenger airlines and several cargo airlines. Dulles International is accessible via the Dulles Access Road (State Route 267) and State Route 28, as well as by several Virginia buses.

Ronald Reagan Washington National Airport (Reagan National) has three terminals, serving dozens of passenger airlines and FedEx Express Cargo Airline. Reagan National is accessible through the George Washington Memorial Parkway, I-395, U.S. Route 1, State Route 233, and the Washington Metro.

Baltimore/Washington International Thurgood Marshall Airport (BWI) has 5 concourses, with 84 gates for passenger flights in total, plus a cargo concourse. BWI serves dozens of passenger and cargo airlines. BWI is also within easy access from I-195, Amtrak, and Maryland's Light Rail and Metro.

167TH AIRLIFT WING OF THE WEST VIRGINIA AIR NATIONAL GUARD

The 167th Airlift Wing of the West Virginia Air National Guard is located in Berkeley County, in Martinsburg. The airlift unit has been serving the state and nation for more than 50 years in a variety of missions. The 167th Airlift Wing is vital to the Air National Guard, as the unit has been deployed around the globe. The Airlift Wing began by flying the F-51 Mustang and F-86 Sabre fighters, but currently flies the C-5 Galaxy aircraft. However, officials plan to switch over to C-17 Globemaster cargo planes in the near future.



SOCIOECONOMIC TRENDS

POPULATION

At the 2010 census, Region 9 had a population of 177,208, which represents a 31.7% increase from the year 2000 (see Table 8). The population is expected to continue to grow and, by the year 2018, estimates show an approximate population of 191,611. 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% and is projected to increase another 6.8% between 2013 and 2018. 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 increased by 2.5% between 2000 and 2010, and the population of the nation increased by 9.7% during that time. The populations of West Virginia and the nation are projected to increase by 1.4% and 3.6%, respectively, from 2013 to 2018.

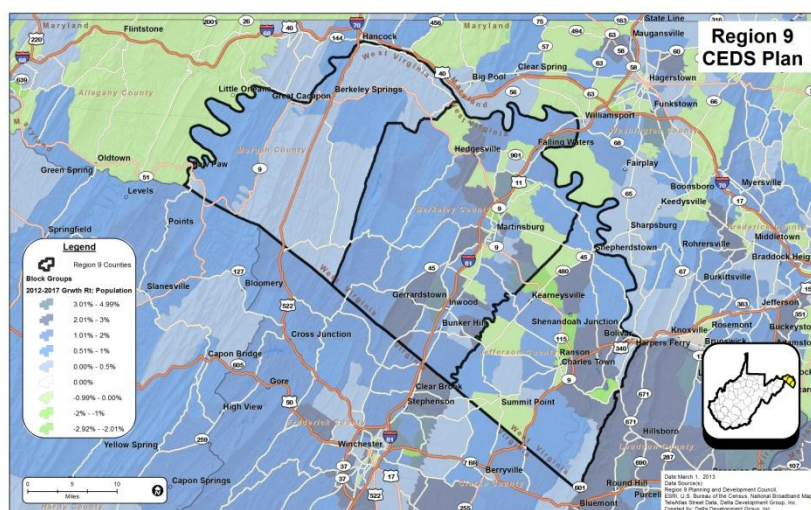
TABLE 8: POPULATION IN REGION 9, WEST VIRGINIA, AND THE UNITED STATES, 2000-2018

| | 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 |
| 2013 (Estimate) | 108,364 | 55,331 | 17,776 | 181,471 | 1,875,847 | 314,467,933 |
| 2018 (Projected) | 115,700 | 57,945 | 17,966 | 191,611 | 1,902,177 | 325,843,774 |
| Change 2000 to 2010 | 37.2% | 26.8% | 17.4% | 31.7% | 2.5% | 9.7% |
| Change 2013 to 2018 | 6.8% | 4.7% | 1.1% | 5.6% | 1.4% | 3.6% |

Source: U.S. Census Bureau; ESRI Estimates

The following map shows the expected population change in the three counties of Region 9 from 2012 to 2017, in comparison with the surrounding area.

FIGURE 7: PROJECTED POPULATION CHANGE 2012-2017



AGE

Region 9 has a population that is slowly aging. From 2000 to 2010, the populations of Berkeley and Jefferson Counties aged by nearly two years, while the median age of Morgan County's population decreased. The median age of the region's population is expected to increase through 2018, though at a slightly slower rate than that of the state of West Virginia. The median age of both Region 9 and the state of West Virginia are higher than the United States (see Table 9).

TABLE 9: MEDIAN AGE IN REGION 9, WEST VIRGINIA, AND THE CONTINENTAL 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 |
| 2013 | 38.3 | 39.7 | 38.3 | 42.1 | 37.6 |
| 2018 | 39.2 | 40.5 | 39.2 | 43.3 | 38.1 |
| Change 2000 to 2010 | 4.75% | 5.43% | -7.86% | 6.17% | 5.10% |
| Change 2013 to 2018 | 2.35% | 2.02% | 2.35% | 2.85% | 1.33% |

Source: U.S. Census Bureau; ESRI Estimates

A breakdown by age cohorts shows that the young population (residents under 25 years of age) is decreasing slightly in Region 9 and in West Virginia, and is expected to continue this trend through 2018 (see Table 10). From 2000 to 2010, this young population declined by 2.7% in Berkeley County and 0.9% in Jefferson County. Morgan County experienced a 13% growth in the young population during this time. All three Region 9 counties, as well as the state of West Virginia and the nation, are projected to continue to lose about 3% of their young population from 2013 to 2018.

TABLE 10: RESIDENTS UNDER AGE 25 IN REGION 9, 2000-2018

| | Berkeley County | Jefferson County | Morgan County | West Virginia | United States |
|---------------------|-----------------|------------------|---------------|---------------|---------------|
| 2000 | 33.9% | 33.8% | 29.2% | 31.6% | 33.4% |
| 2010 | 33.0% | 33.5% | 33.0% | 30.0% | 33.9% |
| 2013 | 32.4% | 32.8% | 32.4% | 29.2% | 33.4% |
| 2018 | 31.5% | 31.8% | 31.5% | 28.3% | 32.3% |
| Change 2000 to 2010 | -2.7% | -0.9% | 13.0% | -5.1% | 1.5% |
| Change 2013 to 2018 | -2.8% | -3.0% | -2.8% | -3.1% | -3.3% |

Source: U.S. Census Bureau; ESRI Estimates

Correspondingly, the population aged 65 years and over grew in Region 9 and is expected to continue to grow through 2018 (see Table 11). Berkeley and Jefferson Counties experienced a growth in this older population from 2000 to 2010, at 0.9% and 5.4%, respectively. Morgan County was again the outlier, experiencing a decline in its older population during this time. All three Region 9 counties, as well as West Virginia, are expected to gain population aged 65 and over between 2013 and 2018 at a slightly higher rate than the nation.



TABLE 11: RESIDENTS AGED 65 AND OVER IN REGION 9, 2000-2018

| | Berkeley County | Jefferson County | Morgan County | West Virginia | United States |
|---------------------|-----------------|------------------|---------------|---------------|---------------|
| 2000 | 11.2% | 11.2% | 16.6% | 15.3% | 13.9% |
| 2010 | 11.3% | 11.8% | 11.3% | 16.0% | 13.0% |
| 2013 | 12.5% | 13.3% | 12.5% | 17.2% | 13.9% |
| 2018 | 14.7% | 15.7% | 14.7% | 19.9% | 15.8% |
| Change 2000 to 2010 | 0.9% | 5.4% | -31.9% | 4.6% | -6.5% |
| Change 2013 to 2018 | 17.6% | 18.0% | 17.6% | 15.7% | 13.7% |

Source: U.S. Census Bureau; ESRI Estimates

The population between the ages of 25 and 64 is very important because it represents the working age population and an essential driver of the regional economy. From 2000 to 2010, the working age population remained stable in the three Region 9 counties. Berkeley and Morgan Counties mirrored the state trend and experienced a modest increase in this population at 1.6% and 3%, respectively, compared to the state rate of 1.5% (see Table 12). Jefferson County experienced a small decline in the working age population, at -0.7%. From 2013 to 2018, this population is expected to decline in each of the three counties by around 2.5%. This is similar to population projections for the state, which show a decline of about 3.2% in the working age population. The projection for the United States also shows a small decline in the percentage of the working age population from 2013 to 2018.

TABLE 12: WORKING AGE RESIDENTS IN REGION 9, 2000-2018

| | Berkeley County | Jefferson County | Morgan County | West Virginia | United States |
|---------------------|-----------------|------------------|---------------|---------------|---------------|
| 2000 | 54.8% | 55.1% | 54.1% | 53.1% | 52.8% |
| 2010 | 55.7% | 54.7% | 55.7% | 53.9% | 53.0% |
| 2013 | 55.2% | 53.6% | 55.2% | 53.4% | 52.8% |
| 2018 | 53.8% | 52.5% | 53.8% | 51.7% | 52.1% |
| Change 2000 to 2010 | 1.6% | -0.7% | 3.0% | 1.5% | 0.4% |
| Change 2013 to 2018 | -2.5% | -2.1% | -2.5% | -3.2% | -1.3% |

Source: U.S. Census Bureau; ESRI Estimates

HOUSEHOLDS AND HOUSEHOLD SIZE

As of the 2010 census, there were 76,089 households in Region 9 and estimates for 2013 show an increase of nearly 2,500 households. Each county in the region experienced an increase in the number of households that mirrors its population increase. From 2013 to 2018, the number of households in each county is projected to increase again by about the same growth rate as the general population. In each of these time segments, Berkeley County has the greatest rate of growth and Morgan County shows the lowest rate of growth. The growth in population and number of households is likely because of the region's close proximity to the Washington, D.C., metropolitan area.



TABLE 13: HOUSEHOLDS IN REGION 9 AND WEST VIRGINIA, 2000-2018

| | Berkeley County | Jefferson County | Morgan County | West Virginia | United States |
|---------------------|-----------------|------------------|---------------|---------------|---------------|
| 2000 | 29,569 | 16,165 | 6,145 | 736,481 | 105,480,101 |
| 2010 | 39,855 | 19,931 | 7,303 | 763,831 | 116,716,292 |
| 2013 | 41,496 | 20,633 | 7,426 | 775,579 | 118,979,182 |
| 2018 | 44,141 | 21,528 | 7,515 | 788,562 | 123,464,895 |
| Change 2000 to 2010 | 34.8% | 23.3% | 18.8% | 3.7% | 10.7% |
| Change 2013 to 2018 | 6.4% | 4.3% | 1.2% | 1.7% | 3.8% |

Source: U.S. Census Bureau; ESRI Estimates

The average household size in Region 9 grew slightly from 2000 to 2010 and is projected to remain about the same through 2018. Berkeley and Jefferson Counties experienced a small increase in household size from 2000 to 2010, at 2.4% and 2.8%, respectively. The average household size in Morgan County, West Virginia, and the United States decreased slightly during that time, at -0.4%, -1.7%, and -0.4%, respectively. The average household size in Region 9, the state, and the nation is expected to remain about the same from 2013 through 2018.

TABLE 14: AVERAGE HOUSEHOLD SIZE IN REGION 9 AND WEST VIRGINIA, 2000-2018

| | Berkeley County | Jefferson County | Morgan County | West Virginia | United States |
|---------------------|-----------------|------------------|---------------|---------------|---------------|
| 2000 | 2.53 | 2.54 | 2.40 | 2.40 | 2.59 |
| 2010 | 2.59 | 2.61 | 2.39 | 2.36 | 2.58 |
| 2013 | 2.59 | 2.61 | 2.38 | 2.35 | 2.58 |
| 2018 | 2.60 | 2.63 | 2.37 | 2.35 | 2.57 |
| Change 2000 to 2010 | 2.4% | 2.8% | -0.4% | -1.7% | -0.4% |
| Change 2013 to 2018 | 0.4% | 0.8% | -0.4% | 0.0% | -0.4% |

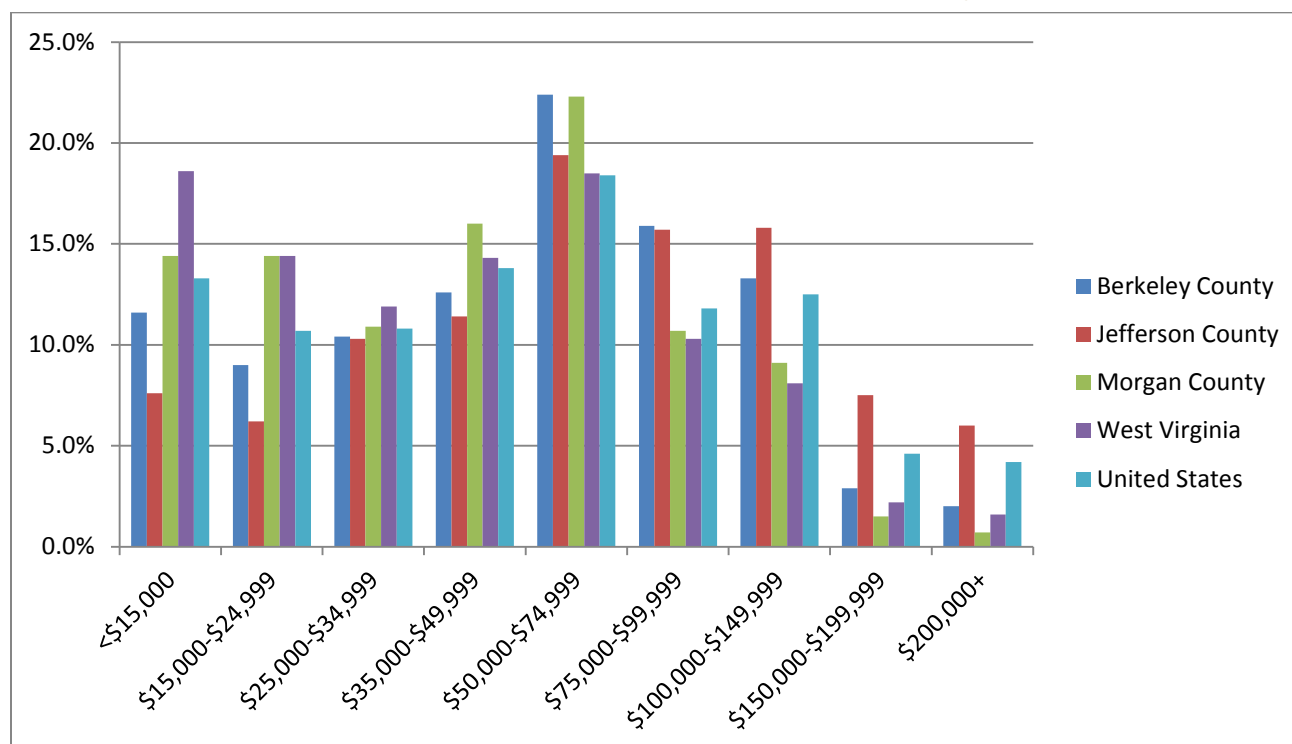
Source: U.S. Census Bureau; ESRI Estimates

HOUSEHOLD INCOME

Household income is higher on average than that of the state of West Virginia. Estimates for 2013 show that Jefferson County had the highest median household income of the three counties in Region 9 at \$66,685. Morgan County had the lowest median household income at \$43,502, but was still higher than the state median household income of \$39,248. In correlation with having the highest median household income, Jefferson County had the highest percentage of households making over \$100,000 per year at 29.3%, and the lowest percentage of households making less than \$25,000 per year, at 13.8%. In comparison, estimates for the state as a whole show 33% of households made less than \$25,000 per year and about 12% made \$100,000 or more per year. Nationwide, 24% of households made less than \$25,000 per year and 21.3% made over \$100,000 per year. The trend of higher-than-average state incomes likely correlate to a high number of residents who work in high-paying jobs in the Washington, D.C., metropolitan area.



FIGURE 8: HOUSEHOLD INCOME LEVEL IN REGION 9 AND WEST VIRGINIA, 2013



RACE AND ETHNICITY

Region 9 is more ethnically diverse than West Virginia as a whole. In 2013, approximately 87% of the Region 9 population was identified as white, compared to 93.4% at the state level. The percentage of black population in Region 9 is about double that of the state. The region also has a higher percentage of residents of Asian descent and Hispanic origin than the state as a whole. Nationwide, 71.6% of the population is white, and the Hispanic, black, and Asian populations are greater than those in Region 9.

TABLE 15: RACE AND ETHNICITY IN REGION 9 AND WEST VIRGINIA, 2013

| | Berkeley County | Jefferson County | Morgan County | West Virginia | United States |
|------------------------|-----------------|------------------|---------------|---------------|---------------|
| White Alone | 87.1% | 86.4% | 87.1% | 93.4% | 71.6% |
| Black Alone | 7.4% | 6.7% | 7.4% | 3.7% | 12.7% |
| American Indian Alone | 0.3% | 0.3% | 0.3% | 0.2% | 1.0% |
| Asian Alone | 1.0% | 1.8% | 1.0% | 0.8% | 4.9% |
| Pacific Islander Alone | 0.0% | 0.1% | 0.0% | 0.0% | 0.2% |
| Other Race Alone | 1.5% | 2.1% | 1.5% | 0.4% | 6.6% |
| Two or More Races | 2.6% | 2.7% | 2.6% | 1.6% | 3.1% |
| Hispanic Origin | 4.6% | 5.6% | 4.6% | 1.4% | 17.4% |

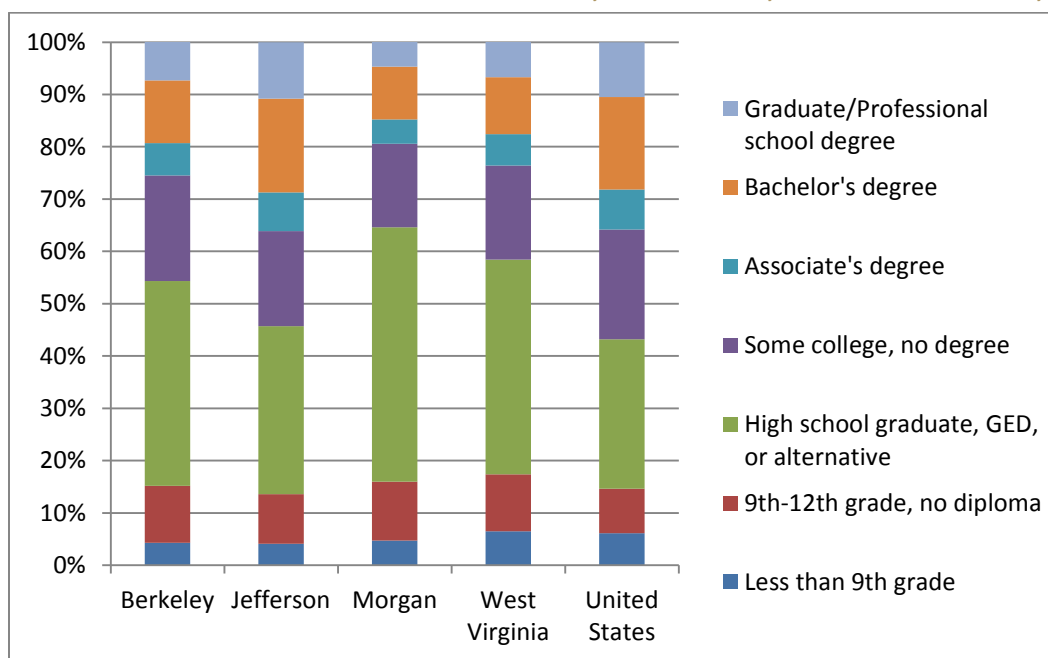
Source: U.S. Census Bureau; ESRI Estimates



EDUCATIONAL ATTAINMENT

Region 9 has a highly educated workforce. Jefferson County leads the region in educational attainment, with 17.9% of the population 25 and older having achieved a bachelor's degree and 10.8% having achieved a graduate or professional degree. Berkeley County's rates of educational attainment mirror the state's rates, and Morgan County lags 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 rate, but fell short of the national average.

FIGURE 9: LEVEL OF EDUCATIONAL ATTAINMENT IN REGION 9, WEST VIRGINIA, AND THE UNITED STATES, 2011

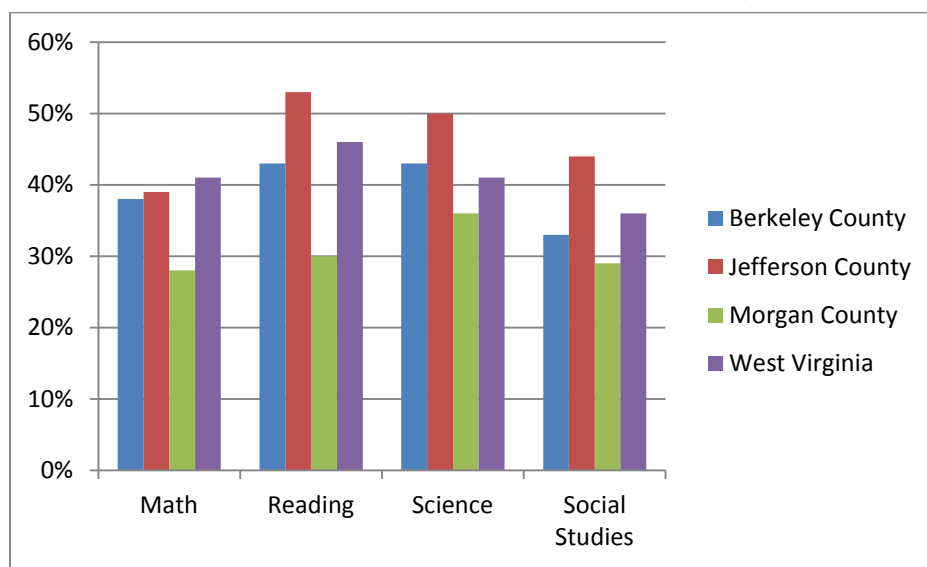


Source: 2011 American Community Survey

HIGH SCHOOL STANDARDIZED TESTING

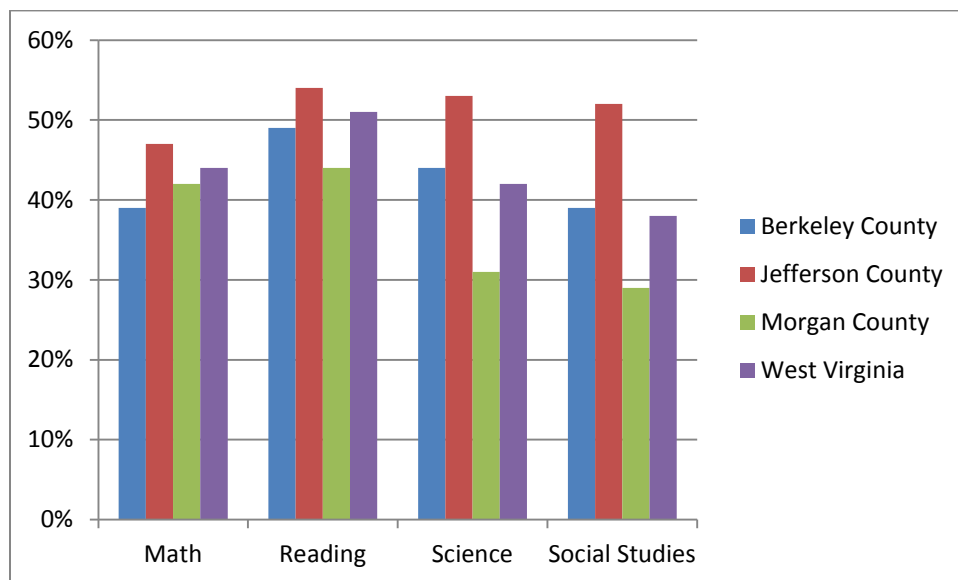
WESTEST 2 is a standardized assessment for West Virginia students. Assessment scores measure a student's level of performance on predefined standards, objectives, and skills. Test questions on the WESTEST 2 Assessment have been developed and aligned to the West Virginia 21st Century Content Standards and Objectives (CSOs). Assessment results demonstrate a student's academic strengths and weaknesses, and student performance is measured by West Virginia academic standards rather than a national comparison. The following graphs illustrate the percent of Region 9 students who achieved a score of "Mastery" or higher for their grade level, compared with the state average, for grades 3, 7, and 10. Jefferson County students consistently exceeded the state average test scores and Morgan County students scored below the state average. Students in Berkeley County, on average, scored about the same as the state overall.



FIGURE 10: 2010-2011 SCHOOL YEAR – WESTEST 2 ASSESSMENT, THIRD GRADE

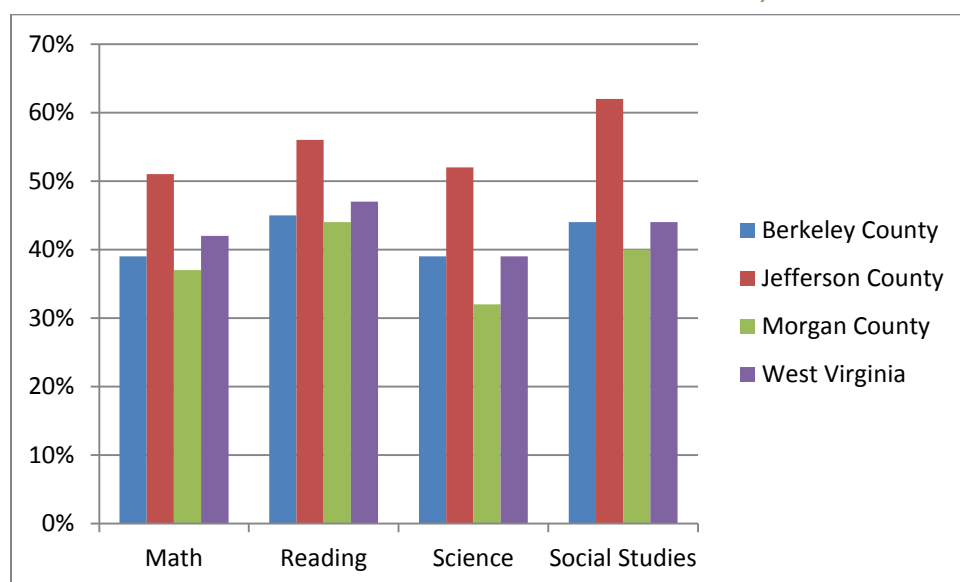
Jefferson County students in the third grade scored higher than the state average in all subjects on the WESTEST 2 Assessment, except for math. Morgan County students consistently scored below the state average. Berkeley County students scored higher than the state average in science, and just under the state average in other subjects.

Source: West Virginia Department of Education

FIGURE 11: 2010-2011 SCHOOL YEAR – WESTEST 2 ASSESSMENT, SEVENTH GRADE

Jefferson County students in the seventh grade scored higher than the state average in all subjects on the WESTEST 2 Assessment. Morgan County students again scored consistently below the state average. Berkeley County students scored higher than the state average in science and social studies, and just under the state average in other subjects.

Source: West Virginia Department of Education

FIGURE 12: 2010-2011 SCHOOL YEAR – WESTEST 2 ASSESSMENT, TENTH GRADE

Jefferson County students in tenth grade again scored higher than the state average in all subjects on the WESTEST 2 Assessment. Morgan County students again scored consistently below the state average. Berkeley County students scored just below the state average in math and reading, and equal to the state average in science and social studies.

Source: West Virginia Department of Education

HIGH SCHOOL GRADUATION RATE

There are three school districts within Region 9. The Morgan County School District reported the highest high school graduation rate for the 2012-2013 school year at 90.8%. The Berkeley County School District reported the lowest high school graduation rate at 79.5% for the same year. The graduation rate in the Jefferson County School District fell in between, at 84.6%. All three school districts exceeded the statewide average graduation rate for the 2012-2013 school year. Graduation rates are reported using a four-year adjusted cohort graduation rate calculation. This measures the percent of students in a ninth grade cohort who graduated with a regular diploma in four years or less.

TABLE 16: 2012-2013 SCHOOL YEAR – HIGH SCHOOL GRADUATION RATES IN REGION 9

| District/School | Graduation Rate |
|----------------------------------|-----------------|
| Berkeley County School District | 79.5% |
| Jefferson County School District | 84.6% |
| Morgan County School District | 90.8% |
| West Virginia Total | 79.3% |

Source: West Virginia Department of Education

CAREER TRAINING INITIATIVES

The West Virginia Manufacturers Association is starting two new initiatives aimed at drawing and preparing high school students for manufacturing careers. The initiatives were created to help young people reject the stigma attached to manufacturing jobs and encourage them to attend two-year technical college programs for manufacturing. The first initiative is Manupaths, a two-year program for high school students in vocational-technical schools across the state. The program focuses on math, science, and technology in preparing students for higher level manufacturing college programs. The Federation for Advanced Manufacturing Education is another program in which students split their time learning in the classroom and working for manufacturers for five semesters. Students graduate from this



program ready for a middle-skill manufacturing job, but without the debt that often accompanies a four-year, non work-study program. These programs help train young people for the growing manufacturing industry, while working to reduce the future unemployment rate.

HIGHER EDUCATION PROGRAMS AND FACILITIES

The presence of educational institutions provides for a more qualified, educated workforce that can attract high-tech and professional service businesses. When identifying economic development opportunities within the region, the universities and colleges are a strong selling point. Colleges and universities also provide partnership opportunities for research and development. The technical institutes located in the region offer college credits and professional licensing for students wishing to further their job skills or pursue new careers.

TABLE 17: REGION 9 POST-SECONDARY AND VOCATIONAL SCHOOLS

| County | Educational Institution | Location | Highest Degree | 2012 Enrollment | Graduation Rate |
|-----------|--|------------------|--------------------------------|------------------|---------------------|
| Berkeley | James Rumsey Technical Institute | Martinsburg | GED and Professional Licensing | 162 | 71% |
| | Blue Ridge Community & Technical College | Martinsburg | Associate | 6,027 | 13% |
| | University of Charleston-Martinsburg | Martinsburg | Doctorate | 1,507 (UC Total) | 52% (UC Total) |
| | Valley College of Technology | Martinsburg | Associate | 103 | 68% |
| | Shepherd University | Martinsburg | Masters | | |
| Jefferson | American Public University | Charles Town | Masters | 110,644 | <i>Not reported</i> |
| | Shepherd University | Shepherdstown | Masters | 5,229 | 46% |
| | Blue Ridge Community & Technical College | Satellite Office | | | |
| Morgan | West Virginia University Extension | Berkeley Springs | Masters | N/A | N/A |
| | Blue Ridge Community & Technical College | Satellite Office | | | |

Source: National Center for Education Statistics

HOUSING TENURE

The rate of owner-occupied housing in Region 9 is similar to the state's rate and is higher than the national average. Berkeley and Jefferson Counties also have a rate of renter occupancy that is similar to West Virginia; while Morgan County's rate of renter occupancy is significantly lower (25.3% for the state as a whole compared to 14.6% in Morgan County). The rate of renter-occupied housing is greater nationwide than in Region 9. Berkeley and Jefferson Counties have lower rates of vacant housing units (11.1% and 9.5%) than the state (13.6%), while Morgan County has a much higher rate of vacant housing than the state (25.3%). These vacant units may be for rent, rented but not occupied, for sale, sold and not occupied, for seasonal or recreational use, for migrant workers, or unoccupied for other reasons.



TABLE 18: HOUSING OCCUPANCY IN REGION 9, WEST VIRGINIA, AND THE UNITED STATES, 2013

| | Berkeley County | Jefferson County | Morgan County | West Virginia | United States |
|-----------------|--------------------|---------------------|------------------|------------------|------------------|
| Owner Occupied | 64.0% | 67.0% | 60.1% | 61.1% | 56.4% |
| Renter Occupied | 25.0% | 23.5% | 14.6% | 25.3% | 32.3% |
| Vacant | 11.1% | 9.5% | 25.3% | 13.6% | 11.3% |

Source: U.S. Census Bureau; ESRI Estimates



INDUSTRY AND JOB TRENDS***JOB TRENDS***

In total in the three-county region, the industry employing the most workers was the Accommodation and Food Services sector, at 16.23% or 7,719 workers (see Table 19). The second-largest industry in the region was the Retail Trade sector, at 14.75% or 7,013 workers. The Educational Services and Health Care and Social Assistance sectors were also big employers in the region, employing 13.82% and 13.37% of workers, respectively. 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

In the third quarter of 2012, there were 29,543 jobs in Berkeley County. The top employing industries in the county were the Health Care and Social Assistance sector (15.7% or 4,652 jobs); the Retail Trade sector (15.6% or 4,596 jobs); and the Educational Services sector (11.3% or 3,337 jobs). According to Workforce West Virginia, the state's network of workforce development services, the top employers in Berkeley County in 2012 were the Berkeley County Board of Education, the Department of Veterans Affairs, and City Hospital, Inc.

Between 2007 and 2012, the fastest-growing industry in Berkeley County was the Arts, Entertainment, and Recreation sector at 71.5%. This increase may be partially affected by the high population growth, as a higher population puts pressure on retail, recreation, and entertainment services. Art, theater, and heritage activities are popular in Berkeley County. The Management of Companies and Enterprises sector grew by 56.5% and the Wholesale Trade sector grew by about 35.1%. The Manufacturing, Construction, and Finance and Insurance sectors declined the most during this time, at -39%, -13.2%, and -13%, respectively.

JEFFERSON COUNTY

In the third quarter of 2012, there were 15,094 jobs in Jefferson County. The industries employing the most workers were the Accommodation and Food Services sector at 28.4% (4,288 workers), the Educational Services sector at 19.2% (2,893 workers), and the Retail Trade sector at 13.1% (1,978 workers). As reported by Workforce West Virginia, the top employers in the county were PNCI Charles Town Gaming, the Jefferson County Board of Education, and Shepherd University.

Between 2007 and 2012, the Accommodation and Food Services industry grew more than any other sector in Jefferson County, at 152.4%. The Hollywood Casino in Charles Town launched an aggressive marketing campaign throughout the surrounding area, including parts of Maryland and Virginia, and is likely a major source of this growth in employment. Additionally, the drastic growth in population created demand for retail and food services industries. The Transportation and Warehousing sector increased by 60.3%, and the Educational Services sector increased by 26.2% between 2007 and 2012. The Mining sector and Management of Companies and Enterprises sector declined at the greatest rate from 2007 to 2012, with each sector losing 100% of its workers. The Arts, Entertainment, and Recreation sector declined by 76.7% during that time.



MORGAN COUNTY

Morgan County had 2,919 jobs available in the third quarter of 2012. The top employing industry was the Health Care and Social Assistance sector, employing 19% of the county's workforce. The Retail Trade sector and Accommodation and Food Services sector were the next-highest employing industries, at 15% and 12.7%, respectively. According to Workforce West Virginia, the top employers in Morgan County in 2012 were the Morgan County Board of Education, the Valley Health System, and the West Virginia Division of Natural Resources.

Between the third quarters of 2007 and 2012, the fastest-growing industry in Morgan County was the Agriculture, Forestry, Fishing, and Hunting sector (1,500%). There are a large number of small-scale, family-owned farms in the county and in recent years, businesses have begun focusing on agritourism. In addition, hunting, fishing, and hiking are popular recreational activities. The Wholesale Trade sector grew by about 135.3% and the Public Administration sector grew by 54.5% during this time. The most rapidly declining sectors in the county were the Arts, Entertainment, and Recreation sector (-48.3%); the Professional, Scientific, and Technical Services sector (-39.5%); and the Real Estate and Rental and Leasing sector (-36.4%).

TABLE 19: EMPLOYMENT BY INDUSTRY IN REGION 9, 2007 AND 2012

| | Berkeley County | | Jefferson County | | Morgan County | |
|---|-----------------|---------|------------------|---------|---------------|---------|
| | Q3 2007 | Q3 2012 | Q3 2007 | Q3 2012 | Q3 2007 | Q3 2012 |
| Agriculture, Forestry, Fishing and Hunting | 182 | 200 | 70 | 78 | 0 | 16 |
| Mining | 162 | 158 | 79 | 0 | 0 | 0 |
| Utilities | 243 | 241 | 22 | 25 | 22 | 22 |
| Construction | 1816 | 1,576 | 733 | 478 | 169 | 128 |
| Manufacturing | 2,644 | 1,612 | 1,048 | 969 | 231 | 184 |
| Wholesale Trade | 1047 | 1,415 | 321 | 296 | 17 | 40 |
| Retail Trade | 3,689 | 4,596 | 2,217 | 1,978 | 444 | 439 |
| Transportation and Warehousing | 798 | 804 | 68 | 109 | 21 | 24 |
| Information | 1,662 | 1,604 | 196 | 140 | 38 | 28 |
| Finance and Insurance | 722 | 628 | 322 | 289 | 89 | 85 |
| Real Estate and Rental and Leasing | 429 | 393 | 150 | 112 | 33 | 21 |
| Professional, Scientific, and Technical Services | 1,284 | 1,142 | 543 | 496 | 81 | 49 |
| Management of Companies and Enterprises | 85 | 133 | 32 | 0 | 0 | 0 |
| Administration and Support, Waste Management and Remediation | 1,679 | 1,804 | 283 | 304 | 30 | 33 |
| Educational Services | 2,725 | 3,337 | 2,293 | 2,893 | 363 | 341 |
| Health Care and Social Assistance | 3,818 | 4,652 | 1,054 | 1,153 | 510 | 554 |
| Arts, Entertainment, and Recreation | 260 | 446 | 1,819 | 424 | 29 | 15 |
| Accommodation and Food Services | 2,657 | 3,060 | 1,699 | 4,288 | 354 | 371 |
| Other Services (excluding Public Administration) | 708 | 683 | 476 | 543 | 120 | 101 |
| Public Administration | 924 | 1,059 | 454 | 519 | 303 | 468 |
| Total | 27,534 | 29,543 | 13,879 | 15,094 | 2,854 | 2,919 |

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



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. According to this analysis, the strongest industries in Region 9 are the Agriculture, Forestry, Fishing, and Hunting industry (LQ=2.4) and the information industry (LQ=2.3).

Agriculture is not a high-employment industry in Region 9, but in comparison with the agriculture employment in the state as a whole, it is relatively highly concentrated. According to the 2007 Census of Agriculture (the 2012 Census is not yet published), there were 1,591 farms in Region 9 and nearly 35% of the land area in the region was dedicated farmland. Jefferson County had the highest percentage of farmland countywide, at 53%. Berkeley County had the most farms in total, at 833 farms. The median size of a farm in Region 9 was around 50 acres. Most farms in the region are small and family-owned. Agritourism is a growing part of the local economy, and many local food establishments in Morgan County purchase farm products from local farms. Local agriculture also plays an important role in the economic development of Jefferson County, and farms in the area produce and sell fruits, vegetables, poultry, beef, dairy, and Christmas trees. Additionally, the Chesapeake Bay Program published a report in 2008 on the feasibility of using poultry litter for energy in the Chesapeake Bay watershed. Poultry litter was chosen for the report because this watershed is known to be a major producer of poultry.

In 2013, Blue Ridge Community and Technical College (BRCTC) and the University of Charleston-Martinsburg began the implementation of new programs to support the West Virginia Air National Guard's 167th Airlift Wing, as workers transition away from their jobs working on the unit's C-5 transport planes. BRCTC will offer an information security certificate, and students can also earn a bachelor's degree in organizational leadership with a concentration in cyber security at the University of Charleston. Officials at the base believe the new program may be able to attract a cyber unit to the air wing or create other opportunities in the community, which could increase employment in the Information industry in Region 9. Further, the American Public University System (APUS) developed the Graduate Certificate in Business Essentials for the Security Executive program, and began offering the program in the fall of 2013. Course content was developed using an in-depth needs analysis that was based on input from the CSO Roundtable of ASIS International. The analysis identified skills required for CSOs to advance in the field and APUS developed an academic program to provide the appropriate graduate-level education to senior security executives. The partnership contributes directly to the advancement of the security profession.

The region also has a small advantage in the Accommodation and Food Services industry; Educational Services industry; and the Arts, Entertainment, and Recreation industry. The region is nearly equal to the state in terms of employment concentration in the Retail Trade; Wholesale Trade; and Real Estate and Rental and Leasing industries.



TABLE 20: REGION 9 LOCATION QUOTIENT, 2012

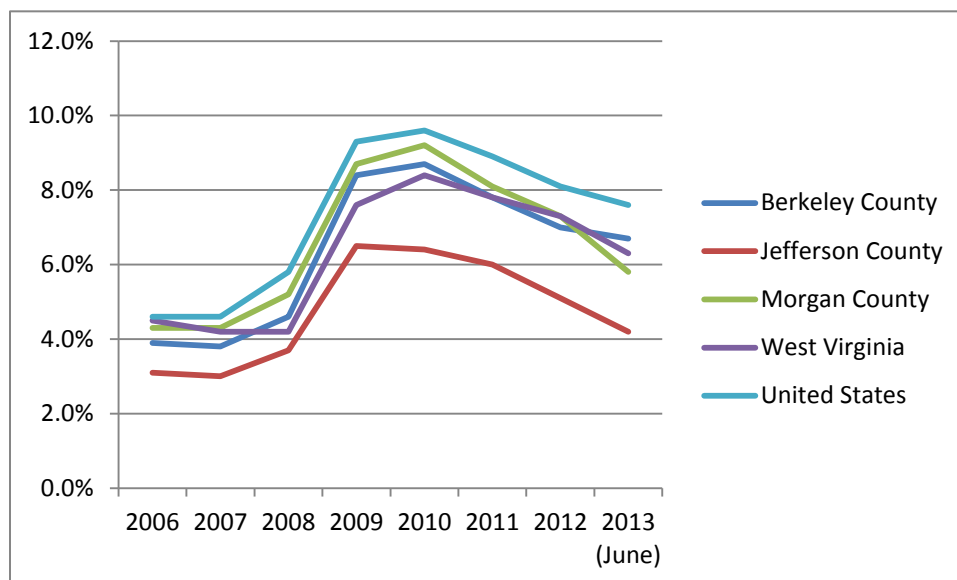
| Jobs by Industry Type | Region 9 | | West Virginia | | LQ |
|--|------------|------------|---------------|------------|-----|
| | Employment | % of Total | Employment | % of Total | |
| Agriculture, Forestry, Fishing and Hunting | 294 | 0.62% | 1,800 | 0.26% | 2.4 |
| Mining | 158 | 0.33% | 32,010 | 4.62% | 0.1 |
| Utilities | 288 | 0.61% | 7,594 | 1.10% | 0.6 |
| Construction | 2,182 | 4.59% | 39,260 | 5.67% | 0.8 |
| Manufacturing | 2,765 | 5.81% | 47,492 | 6.86% | 0.8 |
| Wholesale Trade | 1,751 | 3.68% | 24,032 | 3.47% | 1.1 |
| Retail Trade | 7,013 | 14.75% | 86,306 | 12.47% | 1.2 |
| Transportation and Warehousing | 937 | 1.97% | 18,781 | 2.71% | 0.7 |
| Information | 1,772 | 3.73% | 11,198 | 1.62% | 2.3 |
| Finance and Insurance | 1,002 | 2.11% | 18,987 | 2.74% | 0.8 |
| Real Estate and Rental and Leasing | 526 | 1.11% | 6,908 | 1.00% | 1.1 |
| Professional, Scientific, and Technical Services | 1,687 | 3.55% | 26,098 | 3.77% | 0.9 |
| Management of Companies and Enterprises | 133 | 0.28% | 7,516 | 1.07% | 0.3 |
| Administration & Support, Waste Management and Remediation | 2,141 | 4.50% | 33,726 | 4.87% | 0.9 |
| Educational Services | 6,571 | 13.82% | 64,078 | 9.26% | 1.5 |
| Health Care and Social Assistance | 6,359 | 13.37% | 129,120 | 18.65% | 0.7 |
| Arts, Entertainment, and Recreation | 885 | 1.86% | 9,109 | 1.32% | 1.4 |
| Accommodation and Food Services | 7,719 | 16.23% | 68,571 | 9.90% | 1.6 |
| Other Services (excluding Public Administration) | 1,327 | 2.79% | 21,756 | 3.14% | 0.9 |
| Public Administration | 2,046 | 4.30% | 38,118 | 5.51% | 0.8 |

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

UNEMPLOYMENT

All three counties in Region 9, as well as the state of West Virginia, have consistently had lower rates of unemployment than the United States average over the last eight years. From 2008 to 2009, the region, state, and nation experienced a sudden rise in unemployment of about 3.5%. Jefferson County's unemployment rate changed the least and Berkeley County's unemployment changed the most during that time, at 2.8% and 3.8%, respectively. Since 2010, unemployment rates have been declining in Region 9, as well as in the state and the nation. Between 2010 and the latest estimate in 2013, Morgan County has been recovering at a faster rate than the rest of the region.



FIGURE 13: UNEMPLOYMENT IN REGION 9, WEST VIRGINIA, AND THE UNITED STATES, 2006-2013

Source: Bureau of Labor Statistics

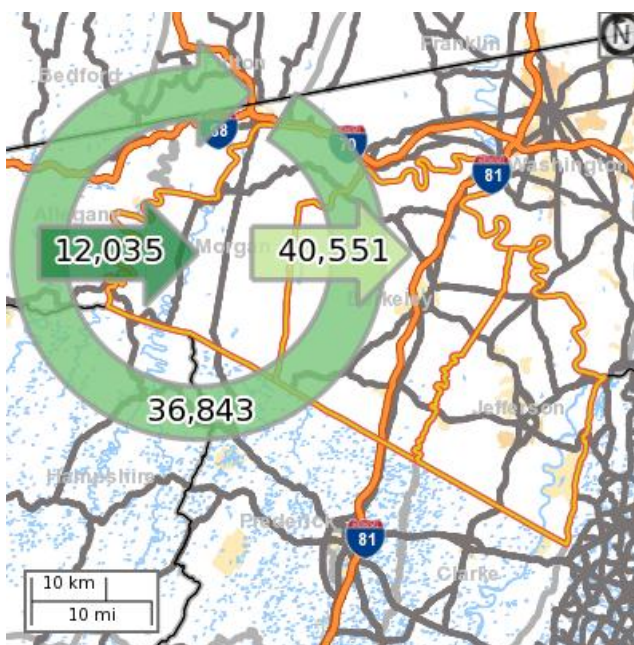
COMMUTE PATTERNS

The three counties of Region 9 have a significant amount of residents who commute outside the region to work, and in 2011, there was a net outflow of 28,516 workers (see Table 21). This is not surprising, given the region's proximity to the Washington, D.C., metropolitan area. The net outflow of workers from the region more than doubled between 2006 and 2007, with the majority of the change coming from Berkeley County. This outflow of workers remained stable until 2010, when it increased again by nearly 34% (6,553 workers). In 2011, the net outflow of workers increased by about 10%, or 2,626 workers.

TABLE 21: NET INFLOW (+) OR OUTFLOW (-) OF WORKERS IN REGION 9, 2006-2011

| | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|-------------------------|--------|---------|--------|---------|---------|---------|
| Berkeley County | -1,464 | -10,540 | -9,735 | -12,172 | -14,965 | -16,587 |
| Jefferson County | -3,085 | -5,989 | -7,297 | -4,656 | -6,920 | -8,056 |
| Morgan County | -2,732 | -2,633 | -2,435 | -2,509 | -4,005 | -3,873 |



FIGURE 14: INFLOW-OUTFLOW OF WORKERS IN REGION 9

In 2011, there were 77,394 working residents in Region 9. Many stay within the region to find work (30% in Berkeley County, 14.9% in Jefferson County, and 2.7% in Morgan County (see Table 22). Of those commuting outside the region for work, most travel to Washington, D.C., and the surrounding metropolitan area, including counties in northern Virginia and central Maryland.

TABLE 22: WHERE REGION 9 RESIDENTS WORK

| | Count | Percent |
|------------------------------|--------|---------|
| Berkeley County, WV | 23,219 | 30.0% |
| Jefferson County, WV | 11,535 | 14.9% |
| Washington County, MD | 5,626 | 7.3% |
| Loudoun County, VA | 4,568 | 5.9% |
| Fairfax County, VA | 3,747 | 4.8% |
| Montgomery County, MD | 3,259 | 4.2% |
| Frederick County, MD | 3,096 | 4.0% |
| Winchester City, VA | 2,130 | 2.8% |
| Morgan County, WV | 2,089 | 2.7% |
| Frederick County, VA | 1,999 | 2.6% |
| All Other Counties | 16,126 | 20.8% |

Source: U.S. Census Bureau, On The Map

In 2011, Region 9 employed a total of 48,878 workers (Figure 13). Approximately 24.6% or 12,035 of the region's workers commute from outside the region and 75.4%, or 36,843 workers, both live and work in the region. Most of the workers within the region also live there. About 4.2% of workers live in Washington County, Maryland. Some employees commute to Region 9 from northern Virginia and from other counties in Maryland.

TABLE 23: WHERE REGION 9 EMPLOYEES LIVE

| | Count | Percent |
|-----------------------|--------|---------|
| Berkeley County, WV | 23,387 | 47.8% |
| Jefferson County, WV | 10,105 | 20.7% |
| Morgan County, WV | 3,351 | 6.9% |
| Washington County, MD | 2,031 | 4.2% |
| Frederick County, VA | 1,111 | 2.3% |
| Frederick County, MD | 800 | 1.6% |
| Hampshire County, WV | 655 | 1.3% |
| Loudoun County, VA | 599 | 1.2% |
| Wood County, WV | 443 | 0.9% |
| Mineral County, WV | 404 | 0.8% |
| All Other Counties | 5,992 | 12.3% |

Source: U.S. Census Bureau, On The Map

BERKELEY COUNTY

In 2011, 40.3% of Berkeley County residents were employed within Berkeley County. Outside of Berkeley County, the resident labor force found jobs primarily in Washington County, MD (9%), and Jefferson County, WV (8.8%). Northern Virginia was another region in which Berkeley County workers found jobs, as shown in Table 24 below. On average, according to the 2009 American Community Survey, workers from Berkeley County had the shortest commute to work in Region 9 at 29.7 minutes. This is about four minutes longer than the state and national average commute time of about 25.4 minutes.

TABLE 24: WHERE BERKELEY COUNTY RESIDENTS ARE EMPLOYED, 2011

| | Count | Share |
|-----------------------|--------|-------|
| Berkeley County, WV | 18,975 | 40.3% |
| Washington County, MD | 4,239 | 9.0% |
| Jefferson County, MD | 4,138 | 8.8% |
| Montgomery County, MD | 1,684 | 3.6% |
| Winchester City, VA | 1,491 | 3.2% |
| Fairfax County, VA | 1,452 | 3.1% |
| Frederick County, MD | 1,449 | 3.1% |
| Loudon County, VA | 1,431 | 3.0% |
| All Other Counties | 12,254 | 25.9% |

Source: U.S. Census Bureau, On The Map

JEFFERSON COUNTY

Over 70% of Jefferson County's residents commuted outside the County for employment in 2011, as shown in Table 25 below. About 12.7% traveled to Berkeley County and significant portions of the workforce traveled to northern Virginia and central Maryland for work. Workers in Jefferson County had the longest commute to work at about 37 minutes, according to the 2009 American Community Survey. This is over 10 minutes longer than the state and national average commute time of about 25.4 minutes.



TABLE 25: WHERE JEFFERSON COUNTY RESIDENTS ARE EMPLOYED, 2011

| | Count | Share |
|-----------------------|-------|-------|
| Jefferson County, WV | 6,987 | 29.8% |
| Berkeley County, WV | 2,988 | 12.7% |
| Loudoun County, VA | 2,963 | 12.6% |
| Fairfax County, VA | 2,063 | 8.8% |
| Frederick County, MD | 1,479 | 6.3% |
| Montgomery County, MD | 1,338 | 5.7% |
| Washington County, MD | 660 | 2.8% |
| All Other Counties | 4,998 | 21.3% |

Source: U.S. Census Bureau, On The Map

MORGAN COUNTY

Morgan County had a high outflow of workers in 2011, as only 24.5% of residents found jobs within the County. Almost 20% of the County's residents traveled to Berkeley County for work and just over 10% commuted to Washington County, Maryland. Many Morgan County residents also traveled to northern Virginia and central Maryland for work, as shown in Table 26 below. Morgan County workers commuted an average of 33.1 minutes to work, according to the 2009 American Community Survey. This is almost eight minutes longer than the state and national average commute time of 25.4 minutes.

TABLE 26: WHERE MORGAN COUNTY RESIDENTS ARE EMPLOYED, 2011

| | Count | Share |
|-----------------------|-------|-------|
| Morgan County, WV | 1,685 | 24.8% |
| Berkeley County, WV | 1,256 | 18.5% |
| Washington County, MD | 727 | 10.7% |
| Jefferson County, WV | 410 | 6.0% |
| Frederick County, VA | 297 | 4.4% |
| Winchester City, VA | 267 | 3.9% |
| Montgomery County, MD | 237 | 3.5% |
| Fairfax County, VA | 232 | 3.4% |
| Loudoun County, VA | 174 | 2.6% |
| Frederick County, MD | 168 | 2.5% |
| All Other Counties | 1,352 | 19.7% |

Source: U.S. Census Bureau, On The Map



BUSINESS CLIMATE

In December 2012, *Forbes* magazine ranked West Virginia 45 out of 50 as one of the worst states in which to do business. This makes it difficult to compete for new businesses, as Virginia is ranked 2nd and Maryland is ranked 16th. States are ranked based on six categories: business costs, labor supply, regulatory environment, economic climate, growth prospects, and quality of life. Compared to surrounding states, West Virginia ranks the lowest in all categories except business costs.

TABLE 27: FORBES RANKING OF BUSINESS CLIMATE IN WEST VIRGINIA AND SURROUNDING STATES, 2012

| Rank | State | Business Costs Rank | Labor Supply Rank | Regulatory Environment | Economic Climate | Growth Prospects | Quality of Life Rank |
|------|---------------|---------------------|-------------------|------------------------|------------------|------------------|----------------------|
| 2 | Virginia | 22 | 4 | 6 | 6 | 9 | 15 |
| 16 | Maryland | 42 | 10 | 39 | 15 | 14 | 8 |
| 30 | Pennsylvania | 39 | 37 | 20 | 16 | 44 | 7 |
| 45 | West Virginia | 13 | 49 | 47 | 19 | 48 | 39 |

Source: *Forbes* 2012

West Virginia offers tax credits to companies making a capital investment to create jobs and offers loans at considerably below the prime rate. Additionally, the Small Business Development Center (SBDC) of the Eastern Panhandle promotes a program of free business assistance for entrepreneurs. This assistance includes business consulting, business plan development, and strategic planning, among others.



ECONOMIC DEVELOPMENT AGENCIES

BERKELEY COUNTY

BERKELEY COUNTY DEVELOPMENT AUTHORITY

The Berkeley County Development Authority (Development Authority) can assist businesses who wish to locate within Berkeley County. The Development Authority provides services including identifying property options and assisting with site selection; assisting in obtaining the necessary permits and licenses; locating workforce development and customized training programs; and determining financing options and incentives. The Development Authority can also provide information on local tax incentive packages and financing packages through local banks. Through the WORKFORCE West Virginia program, Berkeley County also offers workforce training and development programs to help business owners recruit workers, train workers, and reduce costs by on-the-job training. These programs include:

WorkKeys® Career Readiness Certificates: This initiative helps match qualified job seekers with jobs.

Governor's Guaranteed Work Force Program: This program offers customized training grants to eligible companies that create a minimum of ten new jobs within a 12-month period. Under this program, companies can receive up to \$2,000 per employee for training. The program includes the following services:

- Employee recruitment
- Pre-employment assessment
- High performance workplace development
- Structured on-the-job training and development

Workplace Education

- *The Workforce Investment Act (WIA) Program:* This program is targeted toward job seekers that are either economically disadvantaged or displaced due to job shifting in the region.
- *Small Business Work Force Program:* This program is offered to small businesses with 51 or fewer employees that show a need for workforce training to support a competitive improvement activity.
- *West Virginia Advance Program:* This program offers training services to new and existing businesses to support the company's startup and ongoing employee development initiatives. The training is offered through a local community and technical college.
- *The Workforce Development Initiative Program:* This program encourages business and area community and technical colleges to work together.

CHAMBER OF COMMERCE OF MARTINSBURG AND BERKELEY COUNTY

The Chamber of Commerce of Martinsburg and Berkeley County (Chamber) is a nonprofit organization that facilitates the economic progress of its member businesses. Benefits of membership in the Chamber include networking events; advertising opportunities through Chamber events and publications; information on vital issues, economic indicators, and demographics; and leadership training. Together with the Jefferson County Chamber of Commerce, the Chamber facilitates the Women's Network, a new program designed to enhance the personal and professional growth of



businesswomen and encourage the recognition of women in the community. The program includes networking and leadership opportunities, education, and events.

The Chamber also provides contact information for county resources, such as the county development authority, Small Business Development Center, tax department, and others. The Chamber's Workforce Development Committee conducted a comprehensive assessment of local workforce needs in 2011, which is available from the Chamber. The Chamber also provides information about employment opportunities for job seekers in the region.

JEFFERSON COUNTY

JEFFERSON COUNTY DEVELOPMENT AUTHORITY

The Jefferson County Development Authority offers free, confidential services to encourage and promote small business development in Jefferson County. The Jefferson County Development Authority's services include:

- Retention and expansion programs and services for existing businesses
- Services to connect businesses and prospects with local and state resources
- Site selection assistance for new and relocating businesses
- Coordinates county incentives, including tax credits, financial assistance packages, and training assistance programs, with the West Virginia Development Office
- Monthly Eastern Panhandle Entrepreneurs Forums to facilitate networking, mentoring and exchange of free resources for entrepreneurs
- Assist agri-business and agri-tourism with economic development opportunities through the Agriculture Development Office
- Administers a regional workforce database for local businesses looking to hire qualified employees
- Additional services are available through customized assistance

JEFFERSON COUNTY CHAMBER OF COMMERCE

The Jefferson County Chamber of Commerce (Chamber) has served the community for over 50 years and helps promote the businesses and individuals that become members, as well as disseminates information about businesses to new community members. The Leadership Jefferson program is the newest program of the Chamber and runs annually, with the goal of educating current and future community leaders about Jefferson County's assets, opportunities, and hurdles in order to strengthen the sense of community and ensure a prosperous future. The Chamber facilitates the Women's Network in conjunction with Berkeley County.

MORGAN COUNTY

MORGAN COUNTY DEVELOPMENT AUTHORITY

The Morgan County Development Authority promotes business and economic growth by helping businesses identify and receive state-wide tax incentives and financial programs. In addition, Morgan County places a great emphasis on providing top-of-the-line telecommunication services. In 2009, Morgan County created a task force to assess Morgan County telecommunication needs and suggest strategies to bring better telecommunication services to Morgan County businesses and residents.



BERKELEY SPRINGS-MORGAN COUNTY CHAMBER OF COMMERCE

The Berkeley Springs-Morgan County Chamber of Commerce provides a wealth of information about relocating a home or business to Berkeley Springs and Morgan County, including taxes, utilities, schools, culture, and attractions. It is a nonprofit organization dedicated to the encouragement and development of area businesses and the economic climate of the county. They also provides helpful links and contact information to businesses about West Virginia registration and permitting, the Small Business Development Center, and Secretary of State offices.

STATE WIDE AGENCIES**WEST VIRGINIA DEVELOPMENT OFFICE**

The West Virginia Development Office operates under the West Virginia Department of Commerce. Among other purposes, the West Virginia Development Office offers financial incentives to local businesses, including tax credits, financing programs, and training programs. Other incentives include:

- **Economic Opportunity Credit:** Available to qualified businesses that make a qualified investment in a new or expanded business, or for the relocation of a business headquarters.
- **Manufacturing Investment Credit:** Credit for manufacturers that make qualified capital investments in an industrial facility.
- **Strategic Research and Development Credit:** Credit to businesses engaged in qualified research and development activities, to be exempt from West Virginia's consumer sales and service tax and use tax.
- **High Growth Business Investment Tax Credit:** Tax credit equal to 50% of the qualified investment made in companies that have been certified by the tax commissioner as eligible for the Strategic Research and Development Tax Credit.
- **Warehouse "Freeport" Tax Exemption:** Goods in transit to an out-of-state destination are exempt from ad valorem property taxes when warehoused in West Virginia.
- **Five for Ten Program:** This program provides a tax incentive to businesses that make qualified capital improvements of at least \$50 million to an existing base of \$100 million or more.
- **Manufacturing Sales Tax Exemption:** Materials and equipment purchased for direct use in manufacturing are exempt from the six percent state sales and use tax.
- **WV Capital Company Credit:** Investors in qualified West Virginia capital companies are entitled to a state tax credit equal to 50% of their investment.

WEST VIRGINIA ECONOMIC DEVELOPMENT AUTHORITY

The West Virginia Economic Development Authority (WVEDA) was formed in 1962 to "develop and advance the business prosperity and economic welfare of the State of West Virginia, by providing financial assistance in the form of loans and direct financing and operating leases to industrial development agencies and enterprises for the promotion and retention of new and existing commercial and industrial development" (WVEDA website). The WVEDA offers several financial programs that promote business growth and development within the state. These include:

- *The Direct Loan Program:* Program for applicants seeking a loan between \$50,000 and \$10,000,000 from the WVEDA.
- *Tax-Exempt Industrial Development Bonds:* Issued annually by the State of West Virginia.



- *Loan Insurance Program:* Allows the WVEDA to insure up to 80% of a bank loan, with the conditions that the insured portion cannot exceed \$500,000 with a maximum term of four years.
- *Venture Capital:* Seven professionally managed venture capital funds focused upon entrepreneurship in West Virginia with a leveraged potential capacity in excess of \$575 million dollars.
- *The West Virginia Economic Development Grant Committee:* Committee authorizes bonds for qualified economic development, infrastructure, and capital improvement projects in West Virginia.
- *Recovery Zone Economic Development Bond Volume CAP:* WVEDA is responsible for the reallocation of unused volume cap.

WEST VIRGINIA SMALL BUSINESS DEVELOPMENT CENTER

The West Virginia Small Business Development Center (WVSBDC) helps the small and family-owned businesses in West Virginia. The WVSBDC is a division of the West Virginia Development Office, and is funded by the State of West Virginia, the United States Small Business Administration, and the local Community Colleges and Workforce Investment Board Partners. The WVSBDC provides free one-on-one business counseling and training programs to help current and aspiring business owners, as well as businesses that are exploring or already exporting. The WVSBDC also works with the Regional Contracting Assistance center (RCAC) to assist businesses in getting into federal and state contracting.

Entrepreneurs can call the toll-free Small Business “Ask Me! Line” to learn about business services in West Virginia. The services available from the WVSBDC include:

- Access to Angel Capital through the ACE-Net system
- Coaching on business startup
- Coaching on financial matters and developing loan packages
- Coaching on management and personnel issues
- Going Into Business in West Virginia (publication – online or hard copy)
- Ombudsman services – help with regulatory matters
- Sample Business Plan (online)
- Training – online or on-site
- Awards for SBIR/STTR proposal preparation
- Awards for Small Business Work Force development
- Women and Minority-Owned Business Database

The WVSBDC also offers a Three Step Jump Start program to help entrepreneurs and business owners to start and expand their business. The steps include:

1. Fundamentals workshops: Workshops are held monthly throughout the state, and are designed for individuals who are thinking of starting, or have started a business within the past year.
2. Growth workshops: Workshops designed for existing business owners who have owned their business for more than one year and are looking for ways to grow.



3. Meetings with business coaches: The center provides free one-on-one sessions for business owners to meet with business coaches, where the coach helps the business owner design their individual business plan.

WVSBDC offers seminars throughout the state. Seminar topics include pre-business start-ups, financing a business, marketing/sales, business plans, regulatory compliance, customer relations, legal issues, accounting/budget, managing a business, procurement/purchasing, women's business, international trade, software training, and others.

Although the WWSBDC does not make loans or grants, the center can help business owners identify and prepare financial packages and opportunities.

The WWSBDC operates 12 centers throughout the state. There is a center within Region 9 in Martinsburg, which serves Berkeley County, Jefferson County, and Morgan County.



FOREIGN TRADE ZONES***FOREIGN TRADE ZONE IN MARTINSBURG, WV***

Foreign Trade Zones (FTZ) are the United States' version of "free trade zones." FTZs are established by the Foreign Trade Zones Board under the Foreign Trade Zones Act of 1934, and are located in or near Custom and Border Protection (CBP) ports of entry. They may be operated by qualified public or private corporations. Any legal merchandise, domestic or foreign, is allowed in a FTZ. Merchandise in a FTZ may be stored, examined, sampled, and exhibited, but retail trade of foreign merchandise is not allowed within a FTZ. FTZs offer many advantages, such as theft protection for merchandise by CBP security. Goods stored in and exported from the zone are exempt from U.S. duty or excise tax. Other benefits include improved inventory management, improved company compliance, and automated recordkeeping and document storage. There is also an economic benefit to FTZs, as they may improve cash flow. There is no limit for the amount of time that merchandise can remain in a FTZ. Merchandise may be brought to a FTZ to meet an exportation or other legal requirement.

FTZ Number 240 is located in Martinsburg, WV. The Custom Border Patrol port of entry is listed as Front Royal. The grantee for this FTZ is the West Virginia Economic Development Authority, located in Charleston.



APPALACHIAN REGIONAL COMMISSION

The Appalachian Regional Commission (ARC) has developed guidelines for Asset-Based Development Projects. ARC has suggested that Appalachia counties can increase their revenue and create jobs by identifying and leveraging their strengths. The ARC has designated Region 9 as a Local Development District (LDD).

According to the ARC's strategic plan, *Moving Appalachia Forward*, the vision for the Region is to achieve socioeconomic parity with the remainder of the United States. ARC is serving as a strategic partner and will advocate for communities within Appalachia to achieve sustainable community and economic development.

ARC has identified four specific goals for the Region:

1. To increase job opportunities and per capita income in Appalachia to reach parity with the nation.
2. To strengthen the capacity of the people of Appalachia to compete in the global economy.
3. To develop and improve Appalachia's infrastructure to make the Region economically competitive.
4. To build the Appalachian Development Highway System to reduce Appalachia's isolation.

By building on existing resources – natural, cultural, structural and leadership, the communities will create products and services that are sustainable and will benefit local economies. Communities should inventory cultural, natural, structural, and leadership resources and develop strategies that will leverage strengths while transforming liabilities. According to ARC's strategic plan, the key is to “identify the potential within a community and maximize its impact, developing new revenue streams by turning perceived liabilities into strengths, or developing untapped natural and cultural resources into desired products and services. Successful strategies not only have positive economic impacts, like new jobs and businesses, but strengthen the assets themselves—be they forests, rivers, downtowns, or renovated brownfield facilities—to ensure sustained, long-term impact in a community.”



U.S. ECONOMIC DEVELOPMENT ADMINISTRATION (EDA)

The mission of the U.S. Economic Development Administration (EDA) is to promote innovation and competitiveness to prepare the nation for growth and success in the global economy. The EDA's investment policy was developed to provide a foundation for job growth and the building of long-lasting regional economies throughout the nation. Region 9 has been designated as an Economic Development District (EDD) by the EDA.

The EDA has established a number of investment priorities to be used in evaluating projects for competitive funding. These include the following:

Collaborative Regional Innovation

Initiatives that support the development and growth of innovation clusters based on existing regional competitive strengths. Initiatives must engage stakeholders; facilitate collaboration among urban, suburban, and rural (including tribal) areas; provide stability for economic development through long-term intergovernmental and public/private collaboration; and support the growth of existing and emerging industries.

Public/Private Partnerships

Investments that use both public- and private-sector resources and leverage complementary investments by other government/public entities and/or nonprofits.

National Strategic Priorities

Initiatives that encourage job growth and business expansion related to advanced manufacturing; information technology (e.g., broadband, smart grid) infrastructure; communities severely impacted by automotive industry restructuring; urban waters; natural disaster mitigation and resiliency; access to capital for small, medium-sized, and ethnically diverse enterprises; and innovations in science and health care.

Global Competitiveness

Initiatives that support high-growth businesses and innovation-based entrepreneurs to expand and compete in global markets, especially investments that expand U.S. exports, encourage foreign direct investment, and promote the repatriation of jobs back to the U.S.

Environmentally-Sustainable Development

Investments that promote job creation and economic prosperity through projects that enhance environmental quality and develop and implement green products, processes, places, and buildings as part of the green economy. This includes support for energy-efficient green technologies. For more information please [click here \(PDF\)](#).

Economically Distressed and Underserved Communities

Investments that strengthen diverse communities that have suffered disproportionate economic job losses and/or are rebuilding to become more competitive in the global economy.



STATE OF WEST VIRGINIA ECONOMIC DEVELOPMENT

The Mission of the West Virginia Development Office is to improve the quality of life for all West Virginians by strengthening the West Virginia communities and expanding the West Virginia economy to create additional jobs.

The current Economic Development Strategy goals for West Virginia include the following:

1. Expand and accelerate the presence of businesses within the state from high-growth and other targeted industries, providing support through multiple marketing channels
 - High growth and targeted industries include energy, business services/call centers, food processing, aerospace, chemicals/plastics, technology, fabricated and special metals, automotive, wood products, and environmental/green.
2. Continue priority on infrastructure (water and wastewater) development in local communities.
 - Provision of reliable water and wastewater systems is essential for furthering economic development and growth. These systems:
 - Influence the decisions of firms to locate in a community or region;
 - Facilitate economic diversification by making it easier for a mix of businesses to develop or locate in a given area;
 - Mitigate environmental pollution in streams;
 - Promote better public health through the provision of clean drinking water;
 - Increase land value and the tax base for a community.
3. Expand and promote the Genuine West Virginia Products Program
 - Spotlight outstanding and unique products made in West Virginia, opening new and additional revenue streams to West Virginia businesses and entrepreneurs.
 - Expand www.genuinewv.com brand and product program.
 - Aggressively promote program benefits through multiple communication channels – including business trade associations, EDA's, WVDO mailing lists, and print and social media outlets.
 - Global audiences will have greater access to information about all that is genuinely made and produced in West Virginia.
 - The program is open to all qualified West Virginia companies or individuals and participation is free to all members. A searchable database by geography or category allows visitors to the site to easily find and access product information.
4. Expand and build the base of small businesses within each ON TRAC community, including finding new grant sources to provide funding.
 - Identify goals and assess resources needed for all ON TRAC communities; improve organizational structure and expand technical assistance to ON TRAC communities; create action plans that encourage greater community involvement and address key local problems/needs.
5. Increase the visibility of successful Main Street communities. Promote their impact upon local economic development.



- Partner with WV Tourism to expand marketing and promotion of main Street events and attractions; utilize statewide media campaign to highlight success stories; assist Main Street communities with real estate listings on WV Commerce website; promote relocation and business opportunities of Main Street communities for web and social media outlets.
- 6. Broaden WV Commerce Department and economic development marketing
 - Exploit social media networks to attract and interact with consultants, business decision makers, site selectors and all audiences - including former residents and business entrepreneurs - interested in and connected to West Virginia's economic development, growth, and lifestyle.
- 7. Increase the level of small business assistance to three disadvantaged business audiences and to four key business clusters.
 - Implement a communications program to reach audience and business clusters through database marketing, utilizing target-specific marketing materials.
 - Disadvantaged business groups:
 - Women
 - Minorities
 - Veterans
 - Key business clusters:
 - Health care (physicians, clinics, pharmacies)
 - Provider care (day care, nursing and respite care)
 - High-technology (see objective #1)
 - Provider services (professional and personal amenities)



COMMUNITY AND PRIVATE SECTOR PARTICIPATION

SOAR VISIONING SESSIONS

A critical component of the CEDS process, two stakeholder visioning sessions were held on Tuesday, October 8, 2013 in Martinsburg, West Virginia. These sessions were attended by local and regional representatives from public, private, and non-profit sectors across Morgan, Berkeley, and Jefferson Counties. Conducted in the construct of a “SOAR” facilitated session, the approach encouraged participants to identify the strengths and opportunities inherent in the region and how they could be leveraged to achieve aspirations and results while minimizing or closing gaps or perceived weaknesses. Participants then identified those issues they believe are most important to advancing economic development across the region and the resources necessary to measure achievement.

MORNING SESSION ATTENDEES:

- Guy Avey, Susquehanna Bank
- David Hartley, Eastern Panhandle Home Builders Assoc., Inc.
- Lynn Lashley, Berkely County Solid Waste Authority
- Susanne Lawton, Jefferson County Public Service District
- Kathy Mason, University of Charleston-Martinsburg
- Bill Strider, Jefferson County Public Services District
- Donna VanMetre, James Rumsey Technical Institute
- John Reisenweber, Jefferson County Development Authority
- Matt Mullenax, HEPMPO
- Christina Lundberg, SBDC
- Kimberly Kerthley, Region 9 Staff
- Jennifer O’Brien, Region 9 Staff
- Matthew Pennington, Region 9 WIP Coordinator

AFTERNOON SESSION ATTENDEES:

- Chris Whittaker, Jefferson County Commission
- Patricia McMillan, City of Martinsburg
- Carol York, Morgan County Commission
- Nicolas Diehl, West Virginia Development Office
- Alana Hartman, Potomac Basin Coordinator, WVDEP
- Steven Thomas, Berkeley County Planning Department
- Mark Baldwin, City of Martinsburg
- Joe Cosentini, Charles Town
- Mary Catlett, Town of Hedgesville
- Jody McClintock, Morgan County Commission
- Dave Kardok, Town of Bolivar



- Stacy Dugan, Morgan County Commission
- Joy Lewis, Gov. Office
- Bill Clark, Morgan County EDA
- Sandy Hamilton, BCDA
- Susan Webster, Town of Bath
- John R. Unger II, WV Senate
- Kimberly Kerthley, Region 9 Staff
- Jennifer O'Brien, Region 9 Staff
- Matthew Pennington, Region 9 WIP Coordinator

STRENGTHS

The combined results indicated that the following are viewed as strengths of the Region:

- Access to major transportation corridors (travel/recreation, movement of goods, jobs)
- Easy access to major metropolitan areas and big-city amenities (Washington D.C., Baltimore)
- Peaceful communities with small-town feeling
- Safe; lower crime rates than surrounding areas
- Real estate prices are more affordable than surrounding communities
- Superior quality of life; good place to raise a family
- Location to quality jobs
- Diversity of region (rural, suburban, agricultural)
- Tourism and recreation (Racetrack, Harpers Ferry, Casino, Water Resources, Parks, Berkeley Springs, opportunity for outdoor extreme sports, quality restaurants/retail)
- Historic resources
- Educational system at all levels (WV Promise Scholarship, vocational schools, technical education/training, higher education, adult continuing education)
- Quality recycling centers
- Strong work ethic

OPPORTUNITIES AND ASPIRATIONS

SOAR participants identified various opportunities and aspirations that could be leveraged by the Region's strengths. The opportunities identified represent the "low-hanging fruit," while the aspirations represent longer-term goals. Participants identified opportunities and aspirations to:

- Address infrastructure gaps
- Create greater linkages between workforce development, education, and business
- Expand agricultural turnkey operations (production, processing, packaging, shipping, and retail) and expand year-round farmers' markets
- Expand waste-to-energy and reuse products to address environmental issues
- Focus on economic development initiatives



- Enhance tourism and recreation (preserving the quality of life and natural resources)
- Consider reuse of existing buildings (brownfield development)
- Brand the region to overcome misperceptions about state image

GOALS AND TOP PRIORITIES

SOAR participants also identified the top priorities within the Region. These priorities are in descending order, according to the collective votes by topic areas:

1. Expand/address infrastructure needs, including broadband, roads, water, sewer, stormwater, and power.
 - WITHOUT ACCESS TO ADEQUATE INFRASTRUCTURE, ECONOMIC DEVELOPMENT AND MANY OF THE OTHER OPPORTUNITIES ARE UNLIKELY TO OCCUR.
2. Enhance greater linkages between workforce development, education, and businesses.
 - THIS INCLUDED FOSTERING COMMUNICATIONS BETWEEN THE SCHOOLS, TRAINING CENTERS, AND EMPLOYERS TO MAKE CERTAIN JOBS IN DEMAND ARE FILLED WITH PROPERLY TRAINED EMPLOYEES AND PROSPECTIVE APPLICANTS.
3. Enhance tourism and recreation, while preserving the quality of life and natural resources.
 - ATTRACTING, RETAINING, EDUCATING, EMPLOYING, AND PROVIDING RECREATIONAL OPPORTUNITIES FOR YOUNG PEOPLE IS KEY TO STEMMING “BRAIN DRAIN.”
4. Increase focus on economic development initiatives.
 - THIS CATEGORY ALSO INCLUDED REACHING OUT TO ATTRACT MORE FEDERAL INSTALLATIONS AND NEW PRODUCT DISTRIBUTION CENTERS. IT IS BELIEVED THAT FEDERAL INSTALLATIONS PROVIDE A STEADY, EDUCATED WORKFORCE TO THE REGION.

THREE OPPORTUNITIES WERE EQUALLY WEIGHTED AS A FIFTH CHOICE:

- Expand waste-to-energy and reuse products to address environmental issues.
- Consider reuse of existing buildings (brownfield development).
- Brand and promote the region.

There was a general consensus that priorities must include strong collaboration, working partnerships, and marketing the benefits of living/working/locating a business within the Region.

The focus group session ended with a discussion on results about what is needed to actualize these opportunities and to measure their success. It was agreed that all of these opportunities require funding. Collaboration, project due diligence, stakeholder accountability, communications, and the ability to demonstrate value and benefits for the greatest number of people and communities in Region 9 were recognized as keys to positioning and securing funding.



VISION, GOALS, AND OBJECTIVES

VISION

The vision for Region 9 was developed after much research, analysis, and discussion with local stakeholders. Suggestions and ideas from public participation were integrated with regional data and industry trends to shape the vision for the future of the Region 9.

GOALS AND OBJECTIVES

Region 9's goals and objectives are designed to be flexible and to reflect new directions and opportunities as they are identified. Regional goals are as follows:

Goal 1: Improve and Expand Infrastructure to Facilitate Economic Growth

Goal 2: Support Economic and Workforce Development to Enable the Region to Compete in Global Economy

Goal 3: Leverage Educational, Public, and Private Partnerships to Create Regional Presence

Goal 4: Enhance Tourism and Recreational Opportunities

Goal 5: Preserve Natural Resources and Functions



Goal 1: Improve and Expand Infrastructure Needs in Region 9

To achieve this goal five objectives were identified:

Objectives:

- **Improve and expand on existing water/sewer infrastructure**
- **Effectively manage traffic and road usage**
- **Improve regional broadband availability, reliability, and utilization**
- **Explore additional sources of energy**
- **Effectively manage stormwater**

| Development Strategies/Action Items | | Responsibility | Implementation Schedule (Years) | | |
|-------------------------------------|---|---|---------------------------------|-----|----|
| | | | 1-3 | 3-5 | 5+ |
| Objective 1, Action A | Identify gaps in infrastructure | Region 9, Local Units of Government (LUG), and Economic Development Authorities | x | | |
| Objective 1, Action B | Identify and pursue funding to expand sewage treatment capacity and service area | Region 9 in cooperation with LUG | x | x | x |
| Objective 1, Action C | Identify Funding and Provide Technical Assistance with grant applications and administration | Region 9 in cooperation with LUG | x | | |
| Objective 2, Action A | Continue to collaborate with HEPMPO and their long range transportation plan and WVDOH's Statewide Transportation Improvements Plan | Region 9, HEPMPO, WVDOH, and LUG | x | | |
| Objective 3, Action A | Identify a funding source for a regional broadband coordinator. | Region 9 | X | | |
| Objective 3, | Implement the Broadband | Region 9, LUG, and | X | | |



| Action B | Strategic Plan. | Private Sector | |
|--------------------------|--|---|---|
| Objective 4, Action A | Work with Region 9 Economic Development Authorities to identify sources of energy for industrial parks, commercial areas and business parks to facilitate new economic growth. | Region 9, Economic Development Authorities | x |
| Objective 5, Action A | Pursue funding opportunities for innovative stormwater practices within Region 9 business parks and commercial areas. | Region 9, Economic Development Authorities, LUG | x |
| October 5, Action B | Assist interested communities with developing a prioritized list of stormwater retrofits to assist in managing stormwater | Region 9, LUG | x |



Goal 2: Support Economic and Workforce Development to Enable the Region To Compete in Global Economy

To achieve this goal three objectives were identified:

Objectives:

- **Identify gaps in workforce skills**
- **Attract and retain younger workforce**
- **Identify economic development initiatives**

| Development Strategies/Action Items | | Responsibility | Implementation Schedule (Years) | | |
|-------------------------------------|---|--|---------------------------------|-----|----|
| | | | 1-3 | 3-5 | 5+ |
| Objective 1, Action A | Work with the economic development agencies to develop and administer a survey of business and industry to identify workforce skill gaps. Surveys should be administered every two years. | Region 9 and Economic Development Agencies | x | x | x |
| Objective 1, Action B | Work with local technical schools, business and industry to develop training programs to improve workforce skills | Region 9, Economic Development Agencies, Local Technical Schools, Private Industry | x | x | x |
| Objective 2, Action A | Support Region 9's colleges and universities' job fairs to promote the Region to students as a place to live and work. | Region 9, Economic Development Agencies, Private Industry, Local Realtors | | x | |
| Objective 2, Action B | Market colleges within the region to encourage students to attend school within the region | Economic Development Agencies, Private Industry | x | | |



| | | | |
|--------------------------|--|--|---|
| Objective 2, Action C | Encourage regional support for a young professionals network. | Local Chambers, Region 9 assist where necessary | x |
| Objective 3, Action A | Identify new programs to assist in expansion of current business and industry. | Region 9 should work with local chambers and economic development agencies to annually survey business and industry to determine needs for expansion (e.g. capital expenditures, machinery/equipment, workforce, etc.) | x |
| Objective 3, Action B | Work with Economic Development Authorities, Chambers of Commerce and private industry to establish an entrepreneurial bootcamp to help professionals attain skills to start/grow their business. | Region 9, Economic Development Agencies, Chambers of Commerce, Private Industry | x |



Goal 3: Leverage Educational, Public, and Private Partnerships to Create Regional Presence

To achieve this goal one objective was identified:

Objectives:

- **Support innovative business cluster development**

| Development Strategies/Action Items | Responsibility | Implementation Schedule (Years) | | |
|-------------------------------------|---|---------------------------------|-----|----|
| | | 1-3 | 3-5 | 5+ |
| Objective 1, Action A | Identify infrastructure required to support innovative business clusters (.e.g. research parks, partnerships with universities, etc.) | | x | |
| Objective 1, Action B | Develop partnerships with Economic Development Agencies, Institutions and Private Industry to promote and nurture innovation | | x | |



Goal 4: Enhance Tourism and Recreational Opportunities

To achieve this goal three objectives were identified:

Objectives:

- **Improve and expand biking/hiking trails**
- **Maintain/redevelop historic properties**
- **Support efforts to promote and market the Region's tourism industry**

| Development Strategies/Action Items | | Responsibility | Implementation Schedule (Years) | | |
|-------------------------------------|--|---|---------------------------------|-----|----|
| | | | 1-3 | 3-5 | 5+ |
| Objective 1, Action A | Assist with identification of funding sources to improve/expand trail network. | Region 9, LUG, WVDOH and HEPMPO | | x | |
| Objective 1, Action B | Support efforts to promote biking/hiking trails | Region 9, LUG, Tourism Bureaus | x | x | x |
| Objective 1, Action C | Collaborate with HEPMPO to incorporate bike trails into long range plans, and LUG to incorporate trails in comprehensive plans | Region 9, LUG, HEPMPO | x | x | x |
| Objective 2, Action A | Collaborate with historic foundations and LUG to identify properties for redevelopment | Region 9, Historic Foundations, LUG, Private Owners | x | | |
| Objective 2, Action B | Identify funding sources and historic tax credits to facilitate historic preservation projects | Region 9, LUG, Private Owners | | x | |
| Objective 3, Action A | Identify funding to develop materials to promote the Region | Region 9, Tourism Bureau | x | x | x |



Goal 5: Preserve Natural Resources and Functions

To achieve this goal four objectives were identified:

Objectives:

- **Regional compliance with EPA air quality standards**
- **Regional compliance with Chesapeake Bay Initiatives**
- **Encourage incorporating “green” infrastructure and space in current and future development**
- **Regional compliance with National Flood Insurance Program**

| Development Strategies/Action Items | | Responsibility | Implementation Schedule (Years) | | |
|-------------------------------------|--|---|---------------------------------|-----|----|
| | | | 1-3 | 3-5 | 5+ |
| Objective 1, Action A | Provide education, outreach and encourage community participation in voluntary actions that will improve air quality | Region 9, LUG, Economic Development Authorities | x | | |
| Objective 2, Action A | Assist Local Units of Government with stormwater ordinance development | Region 9, LUG | | x | |
| Objective 2, Action B | Assist with creating and prioritizing a list of regional stormwater retrofit projects | Region 9, LUG | x | | |
| Objective 2, Action C | Work with Region 9 WIP Coordinator to identify funding sources for BMP's to improve water quality in Region 9 | Region 9, Region 9 WIP Coordinator, LUG | x | | |
| Objective 3, Action A | Work with Economic Development Agencies and Local Units of Government to identify | Region 9, Economic Development Agencies, LUG | | x | |



| | | | | |
|--|---|--|---|---|
| federal incentives linked to green infrastructure and job creation | | | | |
| Objective 3, Action B | Work with LUG and WV Brownfields Center to encourage the redevelopment of brownfield sites | Region 9, LUG, WV Brownfields Center, Private Sector | x | x |
| Objective 4, Action A | Assist Region 9 communities in applying for the Federal Emergency Management Agency's Community Rating System (CRS) program | Region 9, LUG | | x |



PERFORMANCE MEASURES

Thus far, the Comprehensive Economic Development Strategy (CEDS) has identified strengths and areas for improvement in Region 9, along with proposed goals, objectives, and strategies to build on regional opportunities. A list of projects is also provided to address economic development problems previously identified. The performance measures set forth will define the metrics of success and provide a benchmark by which Region 9 can evaluate its progress over the next five years. Performance measures are categorized under the same categories as the regional goals. Regional goals are as follows:

Goal 1: Improve and Expand Infrastructure Needs in Region 9

Goal 2: Support Economic and Workforce Development to Enable the Region to Compete in Global Economy

Goal 3: Leverage Educational, Public, and Private Partnerships to Create Regional Presence

Goal 4: Enhance Tourism and Recreational Opportunities

Goal 5: Preserve Natural Resources and Functions

Recommended Performance Measures

GOAL 1

| | Outcome | Performance Measure | Frequency | Source/Collector of Data |
|---|---|--|-----------|--|
| Goal 1: Improve and Expand Infrastructure to Facilitate Economic Growth. | <ul style="list-style-type: none"> Existing water/sewer infrastructure is improved Expanded water/sewer infrastructure provides service to new customers Expanded Water/Sewer Infrastructure creates opportunities for business growth | Number of new projects completed which improve infrastructure (e.g. remove surface water from sewer lines) | Annually | <ul style="list-style-type: none"> LUG Economic Development Agencies Region 9 |
| | | Number of project completed | Annually | <ul style="list-style-type: none"> LUG Economic Development Agencies Region 9 |
| | | Number of new customers | | |
| | <ul style="list-style-type: none"> Improvement in quality of roads More effective use of roads | Existing customers served | Quarterly | <ul style="list-style-type: none"> WV DOT |
| | | Accidents Reports | | |



| | | | | |
|--|--|--|----------|---|
| | <ul style="list-style-type: none"> • Safer roads and intersections | Number of new projects completed or under design | Annually | <ul style="list-style-type: none"> • LUG • Economic Development Agencies • HEPMPO |
| | <ul style="list-style-type: none"> • Regional broadband is expanded, reliable, and better utilized | Number of new broadband projects Number of households served | Annually | <ul style="list-style-type: none"> • LUG • Broadband Companies |
| | <ul style="list-style-type: none"> • New sources of energy are identified • New projects implemented | Number of energy related projects completed Number of industrial parks improved with new energy sources Number of jobs created Number of new businesses created Private investment leveraged | Annually | <ul style="list-style-type: none"> • Natural Gas Suppliers • LUG • Economic Development Agencies |



| GOAL 2 | | | | |
|---|---|---|-----------|---|
| | Outcome | Performance Measure | Frequency | Source/Collector of Data |
| Support Economic and Workforce Development to Enable the Region To Compete in Global Economy. | <ul style="list-style-type: none"> Little to no gaps in workforce skills | Training programs created | Annually | <ul style="list-style-type: none"> Local Vocational and Technical schools Business & Industry |
| | | Number of Businesses reporting workforce skills improving | | |
| | <ul style="list-style-type: none"> Increase in younger workers | Number of workers in the workforce under the age of 30 | Quarterly | <ul style="list-style-type: none"> Local Employment Dynamics Department of Labor Economic Development Agencies |
| | | Number of members in local young business professionals group | Annually | <ul style="list-style-type: none"> LUG Chambers of Commerce |
| | <ul style="list-style-type: none"> Increase in local college attendance | Local college attendance | Annually | <ul style="list-style-type: none"> Local colleges |
| | | Increase in the number and/or amount of scholarship opportunities for local colleges for young people within the region | Annually | <ul style="list-style-type: none"> Local colleges |
| | <ul style="list-style-type: none"> New economic development initiatives | Number of new economic development indicatives created | Annually | <ul style="list-style-type: none"> Economic Development Agencies LUG |



| | | | | |
|---|---|---|------------------|--|
| | | Number of new jobs created | | |
| | | Number of jobs retained | | |
| GOAL 3 | | | | |
| | Outcome | Performance Measure | Frequency | Source/Collector of Data |
| Goal 3: Leverage Educational, Public, and Private Partnerships to Create Regional Presence. | <ul style="list-style-type: none"> Improved innovative business clusters | Number of new clusters created Number of new jobs created Number of jobs retained | | <ul style="list-style-type: none"> Economic Development Agencies LUG Counties |
| GOAL 4 | | | | |
| | Outcome | Performance Measure | Frequency | Source/Collector of Data |
| Goal 4: Enhance Tourism and Recreational Opportunities. | <ul style="list-style-type: none"> Biking and hiking trails are improved and expanded | Number of new biking and hiking trails created | Annually | <ul style="list-style-type: none"> LUG |
| | | Number of biking and hiking trails under improvement | Annually | <ul style="list-style-type: none"> LUG |
| | <ul style="list-style-type: none"> Maintained of historic properties Redevelopment of historic properties | Number of historic properties redeveloped and/or rehab. Private investment leveraged Public funding | Annually | <ul style="list-style-type: none"> LUG |



| | | | | |
|---|--|---|------------------|---|
| | | secured | | |
| GOAL 5 | | | | |
| | Outcome | Performance Measure | Frequency | Source/Collector of Data |
| Goal 5: Preserve Natural Resources and Functions. | <ul style="list-style-type: none"> Regional compliance with EPA air quality standards | Regional compliance with EPA air quality standards; Ozone and PM2.5 | Annually | <ul style="list-style-type: none"> EPA LUG Region 9 |
| | <ul style="list-style-type: none"> Regional compliance with Chesapeake Bay Initiatives | Number of new ordinances adopted Number of new retrofit projects completed | Annually | <ul style="list-style-type: none"> LUG Region 9 Region 9 WIP Coordinator |
| | <ul style="list-style-type: none"> “Green” infrastructure and space is incorporated in current and future development | Number of new “green” projects completed or underway | | <ul style="list-style-type: none"> LUG |
| | | Number of new “green” projects written in future development plans | Annually | <ul style="list-style-type: none"> LUG |



STRATEGIC PROJECTS, PROGRAMS, AND ACTIVITIES

On an annual basis, Region 9's Planning and Development Council solicits projects, programs and activities from the Region's membership.

PROJECT SOLICITATION FORM**Region 9 Planning and Development Council New Project Information Form**

(Please complete for new projects.)

Save this fill in form to a new name in your system before completing to retain the information provided. This original form may also be saved and used as often as needed and will "expand" to contain all applicable information. Use the "Tab" key to move through the fields (grey areas). This form contains multiples pages.

When finished, print, sign and date and forward the form to Region 9.

Submitted by: Type your name here

Project Title: Type project title here

Project Category: ☐ Mandated/Unfunded Infrastructure
☐ Bridges/Roads Infrastructure
☐ Water/Sewer/Storm Water Management
☐ Public/Safety Buildings
☐ Rail/Trail and Streetscape
☐ Other: _____

Project Location: Type project location here

Project Description: Type description of project here

Project Regional Impact: *Click on all boxes that apply.*

- ☐ Project will result in significant improvements to quality of life or support increasing capacity of communities to achieve economic development
- ☐ Project is necessary to retain existing local jobs
- ☐ Project will increase private sector property values
- ☐ Project will eliminate a threat to public health
- ☐ Project will eliminate a threat to the environment

Project Readiness: *Click on the drop down button and choose Yes, No or N/A (not applicable).*

- ___ Planning Stage
- ___ Preliminary Engineering/ Architecture Completed
- ___ Final Engineering/ Architecture Completed



___ Cost Estimates Completed Please indicate estimated cost: \$0.00

___ Environmental Assessments Completed

___ Permit Process Completed

Support Status:

Funds needed (non-local revenues): \$0.00

Have local funds been identified and committed? ___ Funds provided locally: \$0.00

Source of local funds: Describe

Is this a short-term project (next 12 – 18 mo.)? ___

Is this a long-term project (next 2 – 5 years)? ___

Investment Policy Analysis: *Click on all boxes that apply.*

- ☐ Project is market based and proactive in nature and scope
- ☐ Project looks beyond the immediate economic horizon, anticipates economic change and diversifies the local and regional economy
- ☐ Project will leverage significant private sector investment
- ☐ Project has a high probability of success i.e. what is the level of local, state, and matching funds; is there a high degree of commitment of local political “capital” by elected officials; and/or is there a commitment of human resources talent to project outcomes, etc.?
- ☐ Project will result in an environment where higher skill and higher wage jobs are created

Cluster-Based Analysis: *Click on all boxes that apply.*

- ☐ Project will enhance regional competitiveness, support long-term development of the regional economy and encourage Cluster Development
- ☐ Project has geographic concentrations of competing, complementary or interdependent firms and industries that do business with each other and/or have common needs for talent, technology, and infrastructure (Industry Cluster)

Please describe what (if any) assistance that you desire from the Region 9 council:

Print/Type Name: _____

Signature of Submitting Official: _____

Date Submitted: _____

For Region 9 Office Use Only

County Commission or City/Town Council priority for this project is:

Project Category _____

Total Project Score _____ Ranked Number _____

Reviewed and ranked by this jurisdiction for the 2013 Region 9 RDP/CEDS project list.



NEW PROJECT RANKING SHEET – REGIONAL DEVELOPMENT PROGRAM**New Project Ranking Sheet**

(Revised September 2009)

CATEGORY OF PROJECT

- Mandated/Unfunded Infrastructure (**No further analysis required- maximum points**) (60 points)_____
- Bridges/Roads Infrastructure (30 points)_____
- Water/Sewer/Storm Water Management (30 points)_____
- Public/Safety Buildings (20 points)_____
- Rail/Trail and Streetscape (10 points)_____
- Other (30-10 points)_____

TOTAL POINTS _____

MAXIMUM 60 POINTS

REGIONAL IMPACT: (ASSIGN POINTS TO ALL CRITERIA THAT APPLY)

- Project will result in significant improvements to quality of life or support increasing capacity of communities to achieve economic development (1 point)_____
- Project is necessary to retain existing local jobs (1 point)_____
- Project will increase private sector property values (1 point)_____
- Project will eliminate a threat to public health (1 point) _____
- Project will eliminate a threat to the environment (1 point)_____

TOTAL POINTS _____

MAXIMUM 5 POINTS

PROJECT READINESS: (ASSIGN POINTS TO ALL CRITERIA THAT APPLY)

- Planning stage (1 point)_____
- Preliminary Engineering/Architecture completed (3 points)_____ OR
- Final Engineering/Architecture completed (3 points)_____
- Cost estimates completed (2 points)_____
- Environmental Assessments completed (2 points)_____
- Local funds have been identified and committed (2 points) _____

TOTAL POINTS _____

MAXIMUM 10 POINTS

INVESTMENT POLICY ANALYSIS: (ASSIGN POINTS TO ALL CRITERIA THAT APPLY)

- Project is market based and proactive in nature and scope (1 point) _____
- Project looks beyond the immediate economic horizon, anticipates economic changes, and diversifies the local and regional economy (1 point)_____
- Project will leverage significant private sector investment (3 points)_____



- Project has a high probability of success i.e. what is the level of local, state, and matching funds; is there a high degree of commitment of local political “capital” by elected officials; and/or is there a commitment of human resources talent to project outcomes, etc. (3 points)_____
- Project results in an environment where higher skill and higher wage jobs are created (3 points)_____

TOTAL POINTS _____

MAXIMUM 11 POINTS

CLUSTER-BASED ANALYSIS: (ASSIGN POINTS TO ALL CRITERIA THAT APPLY)

- Project will enhance regional competitiveness, support long-term development of the regional economy and encourage Cluster Development (2 points)_____
- Project has geographic concentrations of competing, complementary or interdependent firms and industries that do business with each other and/or have common needs for talent, technology and infrastructure (Industry Cluster) (2 points)_____

TOTAL POINTS _____

MAXIMUM 4 POINTS

Total Project Score_____**Maximum 60 Points**

2013 CEDS PROJECT RANKING COMMITTEE MEETING MINUTES

Tuesday, November 5, 2013

**Eastern Panhandle Regional Planning & Development Council Conference Room
400 W. Stephen Street, Suite 301
Martinsburg, WV 25401**

Present:

Stephen Christian, Stacy Dugan, John Reisenweber, Jennifer O'Brien, Susan Webster, Catie Wilkes

Absent: Guy Avey, Patsy Noland

Jennifer O'Brien called the meeting to order at 11:10 a.m. and welcomed the CEDS Project Ranking Committee members.

Ms. O'Brien explained Kimberly Keithley had spoken with the Economic Development Authorities, Planning Directors, Municipalities' Mayor or City Managers of Berkeley, Jefferson, and Morgan Counties separately on the updates to the current projects on the regional project list. The current projects listed in the Comprehensive Economic Development Strategy RDP/CEDS 2009-2013 were discussed and updated. New projects were submitted to be included with the regional ranking system and consolidated into the current project list

Ms. O'Brien explained the project ranking form to be used for updates to the project list. The ranking form includes factors related to Investment Policy Analysis and Cluster-Based Analysis as a project priority. Projects were ranked based on each category and received a point value based on qualifications. The committee reviewed and discussed the region's updated current projects on the list and the 8 new projects.

The meeting was adjourned at 12:35 pm.

Minutes respectfully submitted by Jennifer O'Brien, Interim Director



TOP PRIORITY PROJECTS

MANDATED UNFUNDED INFRASTRUCTURE

| PROJECT NAME | APPLICANT | C O U N T Y | TIME FRAME | PROJECT IMPACT | POTENTIAL FUNDING SOURCE(S) | DEVELOPMENT STAGE | COST | GOAL # |
|---|---|----------------------------|---------------|--------------------|-----------------------------------|---|--|-----------|
| Wastewater Treatment Plant Facility Plan | City of Martinsburg | B | S/L | EN,CD | IJDC | Planning/Preliminary Engineering/Architecture/ Final Engineering/Cost Estimates Complete | \$51 million | 1 |
| WWTP Nutrient Removal Upgrades/Improvements | Berkeley County Public Service Sewer District | B | S/L | EN,CD | IJDC | Planning/ Preliminary Engineering/ Architecture Completed Final Engineering/Cost Estimates Complete | \$48 million | 1 |
| Charles Town Wastewater Main Plant, Phase I | Charles Town Utility Board | J | L | EN,CD | IJDC | Planning/Preliminary Engineering/Architecture/ Final Engineering/Cost Estimates Complete | \$7.761 million | 1 |
| Charles Town Wastewater Main Plant, Phase II | Charles Town Utility Board | J | L | EN,CD | IJDC | Planning/Preliminary Engineering/Architecture/ Final Engineering/Cost Estimates Complete | \$15.523 million | 1 |
| Wastewater Treatment & Collection System Upgrade Tusawilla | Charles Town Utility Board | J | S | BR,ED,TR, E,C,D | CWSRF, IJDC | Planning/ Preliminary Engineering/ Architecture Completed | \$18,050,750 (Inclusive of Engineering) | 1 |



BRIDGES AND ROAD INFRASTRUCTURE

| PROJECT NAME | APPLICANT | C O U N T Y | TIME FRAME | PROJECT IMPACT | POTENTIAL FUNDING SOURCE(S) | DEVELOPMENT STAGE | COST | GOAL # |
|---|--|----------------------------|---------------|-------------------|-------------------------------------|--|---------------------|-----------|
| I-81 Industrial Park / Corning Way | Berkeley County Economic Development Authority | B | S | BR,ED, TR,E, C,D | DOH | Planning/ Preliminary Engineering/ Architecture Complete/ Environmental Assessment Completed / Cost Estimates Completed | \$3.7 - \$5 Million | 1, 2 |
| Tabler Station - Development Drive Extension | Berkeley County Development Authority | B | L | BR,ED, TR,E, C,D | EDA, DOH, private | Planning/Preliminary Engineering Completed | \$5m to \$7m | 1 |
| Convention Center-- Education/ Medical/ Business Complex | Berkeley County Economic Development Authority | B | L | CD,ED, TR,E | DOT | Planning/Final Engineering/ Architecture Complete/ Environmental Assessment Completed / Cost Estimates Completed | \$14.6 million | 1 |
| US 522 and Fairview Drive Connector Road | Morgan County Commission | M | S | BR,ED, TR,E, C,D | TIGER, WVDOT, Private | Planning/ Preliminary Engineering Completed | \$9 million | 1 |
| GM Access Road Bridge Improvements | Berkeley County Development Authority | B | S | BR,CD,E, EDT, R | DOT | Planning/Final Engineering | Unknown | 1 |
| Tabler Station Business Park/ Infrastructure Improvements | Berkeley County Economic Development Authority | B | L | CD,TR, ED,E | DOT, EDA | Planning/Final Engineering/ Architecture Complete/ Environmental Assessment Completed / Cost Estimates Completed | \$7.2 million | 1 |
| West End Traffic Safety Improvement (RT.51 & Summit Point Road RT.13 Intersection) | City of Charles Town | J | L | TR | DOT, FWHA TEA, Annual Approps., CIP | Planning/ Preliminary Engineering/ Architecture | \$2.1 million | 1 |
| Ranson-Charles Town Green Corridor Revitalization | City of Ranson | J | S | CD,TR | WVDOT | Funded | \$23 million | 1 |



| | | | | | | | | |
|---|--|---|---|----------------|-------|---|----------------|---|
| Paving of Roads | Town of Bath | M | S | CD,ED,T, TR | DOT | Planning/Final Engineering/ Architecture Complete/ Environmental Assessment Completed / Cost Estimates Completed | \$14,000 | 1 |
| Old Town Gateway Corridor Revitalization- Mildred St | City of Ranson | J | L | CD,TR | WVDOT | Planning | \$1.5 million | 1 |
| Route 522 Bypass | Morgan County Economic Development Authority | M | L | TR | WVDOT | Planning complete | \$90 million | 1 |
| East Burke Street Bridge Renovations | City of Martinsburg | B | S | TR | WVDOT | Planning/ Preliminary Engineering/ Architecture | \$500,000 | 1 |
| Across from The Commons (Rt.45) – Service Road | Berkeley County Economic Development Authority | B | L | CD,EN, TR | DOT | Planning | \$17.3 million | 1 |



WATER, SEWER, AND STORMWATER INFRASTRUCTURE

| PROJECT NAME | APPLICANT | C O U N T Y | TIME FRAME | PROJECT IMPACT | POTENTIAL FUNDING SOURCE(S) | DEVELOPMENT STAGE | COST | GOAL # |
|--|---|----------------------------|---------------|-------------------|-----------------------------------|--|-----------------|-----------|
| Inwood Land Drainage & Water Quality Project | Berkeley County Public Service Sewer District | B | S/L | EN,CD,FM | IJDC, Public | Planning/Final Engineering/Architecture Complete/Environmental Assessment Completed / Cost Estimates Completed | \$32 million | 1 |
| Berkeley Springs Water Works Phase III Water Line Replacement | Town of Bath | M | L | BR,CD,ED | DWTRF/IJDC/USDA | Planning/Preliminary Engineering | Unknown | 1 |
| Berkeley Station 24" & 30" Water Main | Berkeley County Public Service Water District | B | S | EN,CD | IJDC | Permitted; Engineering Design Complete | \$1.853 million | 1 |
| 522 Business Park, Water & Sewer Systems Improvements | Morgan County Economic Development Authority | M | S | EN,ED,BR | WVDO Grants/IJDC Loan | Planning/Engineering Complete | \$300,000 | 1 |
| Paw Paw Municipal Water Works Improvement Project | Town of Paw Paw | M | L | BR,ED,CD | SCBG | Planning/Preliminary Engineering | \$15 million | 1 |
| Grubb Corner Water Tank | Berkeley County Public Service Water District | B | L | EN,CD | IJDC | Final Engineering/Architecture Complete, Environment Assessment Complete | \$2.9 million | 1 |
| Blue Ridge Mountain Water Project | Jefferson County Public Service District | J | L | EN,CD | Private/IJDC | Planning Preliminary Engineering | \$16.2 million | 1 |
| Harpers Ferry Water Works Improvement Project | Corporation of Harpers Ferry | J | L | EN,CD | USDA RUS Loan | Planning/Preliminary Engineering | \$2.99 million | 1 |
| Charles Town Water Improvements Project | Charles Town Utility Board | J | L | EN,CD | IJDC | Planning/Preliminary Engineering/Architecture/Final Engineering/Cost Estimates Complete/Environmental Assessment | \$1.5 million | 1 |



| | | | | | | | | |
|---|---|---|---|----------|-------------------|--|-----------------|---|
| Washington Street Drainage Improvement (Harpers Ferry) | Corporation of Harpers Ferry | J | L | EN | USDA, DEP | Planning/Final Engineering/Architecture Complete | \$281,000 | 1 |
| Washington Street Drainage Improvement (Bolivar) | Corporation of Bolivar | J | L | EN | USDA, DEP | Planning/Final Engineering/Architecture Complete | \$141,365 | 1 |
| Warm Springs Watershed Manhole Removal Project | Morgan County Commission | M | S | EN,CD,ED | USDA,IJDC, WVDO | Planning | \$600,000 | 1 |
| Glen Haven & Cavaland Water System Improvement | Jefferson County Public Service District | J | S | EN,CD | WDA, DWTRF / IJDC | Planning/Final Engineering/Architecture Complete/Environmental Assessment Completed / Cost Estimates Completed | \$2.148 million | 1 |
| Alternative Water Source | Morgan County Economic Development Authority | M | L | EN,CD | IJDC | Planning/Preliminary Engineering | \$40,000 | 1 |
| Route 522 Corridor Sewer Extension | Warm Springs PSD/Morgan County Economic Development Authority | M | L | EN,CD | LA,SCBG | Planning | \$1.5 million | 1 |



PUBLIC AND SAFETY BUILDINGS

| PROJECT NAME | APPLICANT | C O U N T Y | TIME FRAME | PROJECT IMPACT | POTENTIAL FUNDING SOURCE(S) | DEVELOPMENT STAGE | COST | GOAL # |
|--|-----------------------------|----------------------------|---------------|-------------------|--|--|---------------|--------|
| Renovation of Charles Washington Hall Multi-Modal Transportation Center | City of Charles Town | J | L | TR,T,E | FWHA TEA, Annual Approps., EDI, Scenic Byways, CIP, USDA | Planning/Engineering Complete/Cost Estimates Complete | \$3.4 million | 1, 4 |
| The Pines Opportunity Center Renovations | Morgan County Commission | M | S | BR,CD, ED | Private | Planning | \$300,000 | 1, 2 |
| New Safety/Public Building | Berkeley County Council | B | L | CD | | Planning Engineering/ Environmental Assessment Complete/Construction | \$14 million | 1 |
| Berkeley County Health Department Building | Berkeley County Council | B | L | CD,ED | General County Funds, Revenue Bonds | Planning | \$2.5 million | 5 |
| Eastern Panhandle Medical Health & Drug Facility | Jefferson County Commission | J | L | BR,CD, E,ED | | Planning | Unknown | 2, 3 |
| Community Service Center | Morgan County Commission | M | S | CD,EN | SCBG, USDA | Planning | \$310,000 | 2 |
| West Side I-81 Police & Fire/EMS Multipurpose Building | City of Martinsburg | B | L | CD | ARRA | Planning On Hold | \$5 million | 5 |
| City Hall/Police Headquarters/Judicial Complex Project | City of Martinsburg | B | L | ED | | Planning On Hold | \$8 million | 1, 5 |
| Berkeley County Facilities Department Building | Berkeley County Council | B | L | ED | General County Funds, Revenue Bonds | Planning | \$1 million | 1, 2 |



| | | | | | | | | |
|--------------------------|-------------------------------|---|---|----|------------------------|----------|---------|---|
| Library Project | Shepherdstown | J | L | CD | Brownfield, Private | Planning | UNKNOWN | 5 |
| Crawford Building | Berkeley County Council | B | L | CD | Brownfield | Planning | UNKNOWN | 5 |



RAIL TRAIL AND STREETScape

| PROJECT NAME | APPLICANT | C O U N T Y | TIME FRAME | PROJECT IMPACT | POTENTIAL FUNDING SOURCE(S) | DEVELOPMENT STAGE | COST | GOAL # |
|---|--|----------------------------|---------------|-------------------|-----------------------------------|---|---------------|--------|
| Streetscape, Potomac Street Project | Corporation of Harpers Ferry | J | L | EN,CD | DOH,Gov.Grants, Private | Planning/Engineering Complete/Cost Estimates Complete/Funded | \$1.7 million | 1 |
| Martinsburg Train Station Corridor | City of Martinsburg | B | S | BR,CD, ED,T,TR | | Planning/Cost estimate completed | \$656,150 | 1, 4 |
| Washington Street Sidewalk Repairs | Corporation of Harpers Ferry | J | L | BR,CD, EN | WVDOH | Planning | \$180,000 | 1, 4 |
| 5th Avenue Extended Streetscape Improvement Project | City of Ranson | J | S | CD,EN, TR | ARRA/DOT LA, NP | Funded | \$1 million | 1, 4 |
| Gateway & Wayfinding Signage System | City of Martinsburg | B | S | TR | Local | Final Engineering/ Architecture Completed | \$400,000 | 4 |
| Washington Street Streetscape Enhancements, Phase III | City of Charles Town | J | L | TR | FWHA TEA, Annual Approps. | Planning/Preliminary Engineering/Architectur e Completed | \$3 million | 1, 4 |
| Armory Wall, Potomac Street | Corporation of Harpers Ferry | J | L | EN | | Planning Complete | \$450,000 | 1 |
| Streetscape- Phase II & Phase III | Town of Bath | M | S | TR,ED,T | TEP | Planning, Design Complete | \$75,000 | 1, 4 |
| North Berkeley Community Park/ North Berkeley Rail Trail Project | Morgan County Commission/Town of Bath | M | L | CD | LA, NP | Planning/Design Complete | \$350,000 | 4, 5 |



| | | | | | | | | |
|---|--|---|---|-----------|-----------------|--|---------------|------|
| Paw Paw Rails to Trails | Morgan County Economic Development Authority | M | L | T,EN,CD | DOT | Partially Funded | \$3-4 million | 4, 5 |
| Road Signs | Morgan County Commission | M | S | TR | EDA, WVEDA, LA | Planning | \$50,000 | 1, 4 |
| Bolivar Beautification Project | Corporation of Bolivar | J | S | BR,CD, EN | WVDEP,WVDOH, LA | Planning | \$150,000 | 1, 4 |
| Edwin Miller Boulevard – Walking paths between businesses West of Route 9 and I-81 | Berkeley County Economic Development Authority | B | L | CD,EN, TR | DOT,CMAQ | Planning/Preliminary Engineering/ Architecture Completed | \$582,000 | 4 |



OTHER

| PROJECT NAME | APPLICANT | C O U N T Y | TIME FRAME | PROJECT IMPACT | POTENTIAL FUNDING SOURCE(S) | DEVELOPMENT STAGE | COST | GOAL # |
|---|---|----------------------------|---------------|-------------------|-----------------------------------|---|--------------|-------------|
| Cacapon State Park Renovations | Morgan County Commission / Development Authority | M | L | BR,E,ED | Senate Bill 362 | Planning/Final Engineering/ Architecture Complete/ Environmental Assessment Completed / Cost Estimates Completed | \$25 Million | 1,2, 3,4 |
| Internet Access/Public Safety Enhancement- Cell towers | Morgan County Economic Development Authority | M | S | ED,CD | ARC, EDA, Homeland Security | Planning Ongoing | \$16 million | 1 |
| Powhatan Place Brownfield Eco Development Initiative | City of Ranson | J | S | ED,BR, CD | BEDI, HUD | Planning/Cost Estimated | \$3 million | 1,4 |
| Greenway Cemetery "Pushing Up Daisies" Project | Town of Bath | M | S | EN,T,FM | NFWF CEM | Planning/Preliminary Engineering/Funded | \$50,000 | 4,5 |
| Natural Gas Project | Jefferson County Development Authority | J | S | BR,CD,E, ED | LA,Private,EDA | Planning | 60,000 | 1,3 |
| Industrial Site w/Rail Service with US Silica | Morgan County Economic Development Authority | M | L | ED,BR | EDA, WVEDA | Planning | unknown | 1 |



| | | | | | | | | |
|--|-------------------------------------|---|---|-----------|-----------------------|-------------------------------|----------------|-------|
| Historic Market House Renovation & Adaptive Reuse | City of Martinsburg | B | S | CD,ED | SCBG | Occupied | \$1.16 million | 1,3,4 |
| Powhatan Place Re-Use Planning & Demolition Phase | City of Ranson | J | S | ED,BR, CD | EDA, Trans, USDA, INF | Planning/Cost Estimated | \$400,000 | 1,4 |
| Berkeley Springs Train Station | Town of Bath | M | L | CD,T | WV DOT TEP | Planning | \$300,000 | 1,3,4 |
| Soccer Field/Recreation Area Development | Morgan County Commission | M | L | CD | LWCF, Brownfields | Planning/Assessment completed | unknown | 1,3,4 |
| MARC Train Stop | Morgan County Development Authority | M | S | ED,TR | DOT | Planning | \$5 million | 1 |
| Ranson Police Dept./GIS Crime Tracking/reporting Initiative | City of Ranson | J | S | ED,BR, CD | DOJ | Planning/Cost Estimated | \$435,000 | 3 |
| Berkeley Springs Recycle | Town of Bath | M | S | EN,CD | Private | Planning | \$25,000 | 3,5 |



CONSOLIDATED PROJECT LIST ACRONYM KEY

| CONSOLIDATED PROJECT LIST ACRONYM KEY | | | |
|---------------------------------------|---------------------------------------|-----------------|--|
| PROJECT IMPACTS | | CEDS GOALS | |
| BR | Business Retention/Expansion | 1 | Improve and Expand Infrastructure to Facilitate Economic Growth |
| CD | Community Development | 2 | Support Economic and Workforce Development to Enable the Region to Compete in Global Economy |
| E | Employment | 3 | Leverage Educational, Public, and Private Partnerships to Create Regional Presence |
| ED | Economic Development | 4 | Enhance Tourism and Recreational Opportunities |
| EN | Environmental Protection | 5 | Preserve Natural Resources and Functions |
| T | Tourism/Travel | | |
| FM | Flood Mitigation | | |
| TR | Transportation Improvement | | |
| | | FUNDING SOURCES | |
| COUNTY | | ACE | Army Corp of Engineers |
| B | Berkeley County | ARRA | American Recovery & Reinvestment Act |
| J | Jefferson County | BEDI | Brownfield Economic Development Initiative |
| M | Morgan County | CDBG | Community Development Block Grant |
| | | CWSRF | Clean Water State Revolving Fund |
| | | DEP | WV Department of Environmental Protection |
| | | DHHS | Department of Health & Human Services |
| PROJECT TYPE | | DOJ | Department of Justice |
| 1 | Mandated/Unfunded Infrastructure | DOT | United States Department of Transportation |
| 2 | Bridges/Road Infrastructure | DWTRF | Drinking Water Treatment Research Fund |
| 3 | Water/Sewer/Stormwater Infrastructure | EDA | Economic Development Administration |
| 4 | Public Safety/Buildings | EPA | Environmental Protection Agency |
| 5 | Rail Trail/Streetscapes | HUD | Housing & Urban Development |
| 6 | Other | IJDC | WV Infrastructure Council |
| | | LA | Local Public Allocation/Appropriation |
| | | NP | Non-Profit Corporation Contribution |
| | | SCBG | Small Cities Block Grant |
| | | USDA | U.S. Department of Agriculture |
| | | WVDOT | WV Department of Transportation |
| | | WVEDA | WV Economic Development Authority |



Exhibit A

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