

ALLEGANY COUNTY

ECONOMIC DEVELOPMENT STRATEGIC PLAN



THOMAS P. MILLER & ASSOCIATES

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Many individuals and organizations have contributed to the development of the Allegany County Economic Development Strategic Plan. We would like to acknowledge the Steering Committee who have provided feedback and guidance throughout the planning process. Additional Allegany County resource partners have provided helpful information regarding their own activities and priorities in order to ensure that a regional context is included in the strategies and action items outlined in plan. Several individuals participated in focus groups and interviews, providing valuable insights on key topic areas. Lastly, community residents participated in public visioning sessions and an online survey, offering public feedback, comments, and ideas for the plan.

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ALLEGANY COUNTY COMMISSIONERS

- Jacob C. Shade, President
- Create V. Brodie, Jr, Commissioner
- David J. Caporale, Commissioner



Chapter 1: Introduction



The Allegany County Economic Development Strategic Plan is a comprehensive document that outlines a vision, strategies, and action items for economic development activities in the County over the next five years. The plan relies on a variety of quantitative and qualitative data to support key findings and identify areas in which the County should invest in order to spur additional growth.

PROCESS

The planning process took place over nine months between August 2018 and May 2019. The Consultant Team, consisting of Thomas P. Miller & Associates, Destination by Design, Gentleman McCarty, and Chris Masingill, completed three on-site visits. These visits included a project launch and presentation to the Allegany County Board of Commissioners, a series of focus group engagements, and public meetings. A presentation will be made to the Board of Commissioners upon adoption of the final plan.

ELEMENTS

The Economic Development Strategic Plan contains the following elements, completed over three key phases: 1) Background Report; 2) Community Engagement; and 3) Plan and Implementation.

BACKGROUND REPORT

The first stage of the planning process involved an in-depth background analysis that combined a literature review of previous plans and reports completed in the County as well as additional quantitative assessments, examining the following key topics:

- Demographics;
- Housing;
- Economy; and
- Tourism.

A summary of the key findings of the Background Report is provided in Chapter 2. The full Background Report is provided in Appendix A.

COMMUNITY ENGAGEMENT REPORT

The Community Engagement Report outlines the findings gathered from focus groups, community visioning sessions, and an online public survey. The key findings from this phase are outlined in Chapter 3 of the plan with the full Community Engagement Report provided in Appendix B.

SWOT ANALYSIS

A SWOT Analysis in Chapter 4 describes the strengths, weaknesses, opportunities, and threats that were identified based on information gathered during analysis and engagement activities throughout the planning process. These items formed the basis of the plan items outlined in later sections of the plan.



GOALS

Chapter 5 describes the four goals that Allegany County and its partners should look to achieve through the execution of the Economic Development Strategic Plan. It also highlights the strategies and key performance indicators that will support these goals during the implementation of the plan.

STRATEGIES & ACTION ITEMS

The Strategies & Action Items described in Chapter 6 outline detailed activities and steps that Allegany County and its partner organizations should take to achieve the established goals. Detailed descriptions of the purpose of the strategies are included as well as key performance indicators. This chapter also provides an implementation matrix for each strategy that outlines the action items, responsible and supporting organizations, timeline, and potential funding sources.

IMPLEMENTATION MATRIX

The Implementation Matrix in Chapter 7 provides a timeline description of the strategies and action items outlined in the previous chapter. This is meant to serve as a guiding document for measuring progress on the action items over time.

PROJECTS

Chapter 8 of the Economic Development Strategic Plan describes current and recommended development projects that can support the established goals in addition the broad strategic activities described in Chapter 6. This provides a description of the project, its current status, and key milestones and action items for development.



Chapter 2: Background Summary



A critical part of the strategic planning process is to understand the existing conditions within Allegany county to identify the key issues, challenges, and opportunities. An in-depth Background Report was prepared to look at the current conditions related to four distinct areas: Demographics, Housing, Economy, and Tourism.

This background report will serve as the foundation for the remaining stages of the strategic planning process, which will build upon the knowledge gathered to engage with the community on the County's overall vision for growth.

KEY FINDINGS:

1) Growing Sectors

There are some industries that have seen significant growth since 2001 including State Government, Excluding Education and Hospitals (526) and Household and Institutional Furniture and Kitchen Cabinet Manufacturing. Projections suggest positive momentum in job growth but given the large concentration of employment in some industries, most of the growth is also likely to occur in specific sectors and even a few business locations.

2) Employment Decline in the Tri-State Region

Allegany County's negative employment is similar to many of the counties. Within the Tri-State region of Somerset, Bedford, and Fulton Counties in Pennsylvania; Garrett, Allegany, and Washington Counties in Maryland; and Mineral, Hampshire, Morgan, and Berkeley Counties in West Virginia, only Garrett, Mineral, Berkeley, and Washington Counties have seen employment growth since 2001. However, Allegany's position as the only County in Maryland in the region to see job loss is of concern.

3) Top Industries by Employment

The top industries employing workers in Allegany County are Restaurants and Other Eating Places; general Medical and Surgical Hospitals; and Education and Hospitals (Local Government). Each of these three industries employ at least 2,000 people. This highlights the importance of the service industry supporting residents and tourists as well as the growing healthcare sector.

ELEMENTS OF THE BACKGROUND REPORT

The **Demographic Analysis** details population trends, including overall historic and projected growth, as well as age, gender, race, and educational attainment.

The **Housing Analysis** provides an assessment of the existing housing stock, including the number of units, type, age, and value as well as market and sales information.

The **Economic Analysis** highlights overall employment and economic trends and provides an in-depth analysis of industry trends, occupations, the largest clusters, and potential target industries for attraction.

The **Tourism Analysis** provides a summary of tourism trends in the United States and within Allegany County, identifying existing assets, opportunities for growth, and examining case studies.



4) Top Industries by Specialization

Furniture and Furniture Related Product Manufacturing and Pulp, Paper and Paperboard Mills are the most specialized industries in Allegany County. These industries are unique in the employment they have in the County relative to the nation and all have seen growth in the last five years. However, much of this employment is concentrated in a few firms.

5) Largest Traded Clusters

Within the larger Tri-State region surrounding Allegany County, there are a few clusters of industries that contribute a significant number of jobs, taxes, and payroll to the economy. The top clusters within the region include Distribution and Electronic Commerce; Coal Mining; and Production Technology and Heavy Machinery. However, Allegany County employment makes up just a small component of these major clusters. Connecting to these regional strengths could be a path for economic growth.

6) Supply Chain Gaps

Amongst the industries that the top traded clusters purchase products from, there are a few products and services that are mostly imported into the region from other places. These industries could represent opportunities for business attraction and include Aircraft Manufacturing; Machine Shops; Corrugated and Solid Fiber Box Manufacturing; and Search, Detection, Navigation, Guidance, Aeronautical and Nautical System and Instrument Manufacturing.

7) Tourism Growth

Tourism represents a major opportunity for economic growth within Allegany County. There are a number of key assets that the County can look to improve, market, and build out in order to continue to grow the number of visitors to the County. Targeting tourists for overnight stays will be a key component of this effort as hotel and motel tax revenues have flattened recently after growth over the last few years.

8) Population Decline

Population decline has created challenges for Allegany County's economy and a need to attract a skilled labor force capable of supporting new and existing industry.

9) Aged Housing

The existing housing stock in Allegany County is older, with little new development in the last few years. New and improved housing is needed to support the existing population and attract new residents.

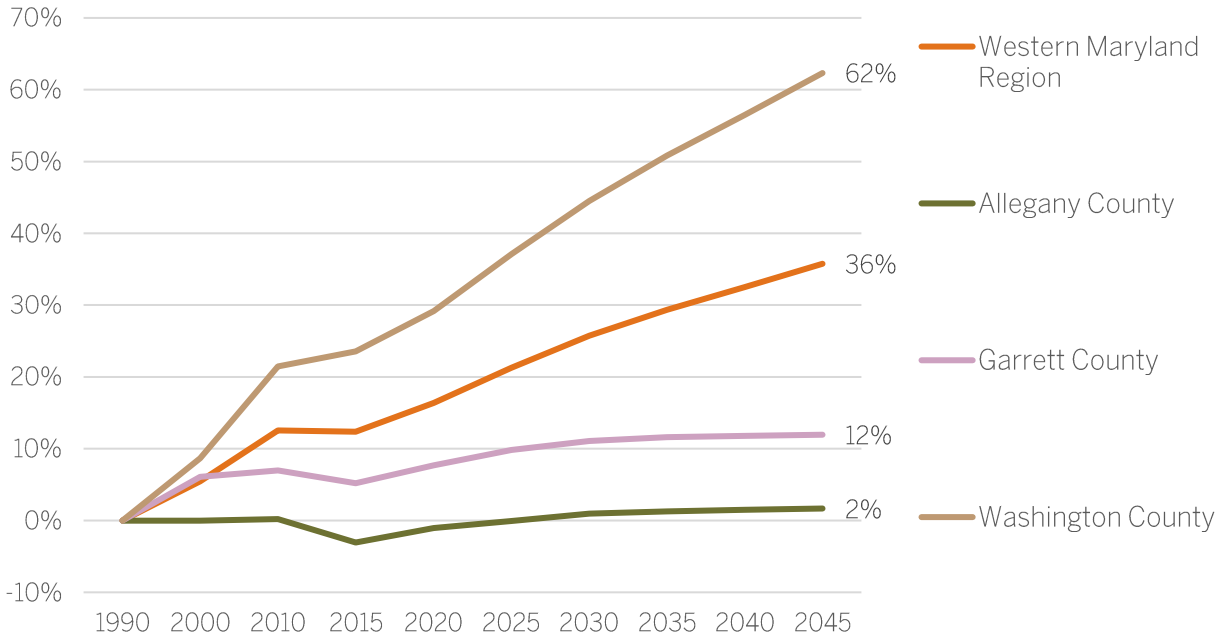
10) Job Loss

Employment in Allegany County has decreased in recent years alongside the negative trend in population. Industries with the most severe decline since 2001 include Department Stores; Pulp, Paper, and Paperboard Mills; and Local Government, excluding Education and Hospitals. In May 2019, Luke Mill announced its impending closure eliminating 675 jobs and furthering this trend.



DEMOGRAPHIC OVERVIEW


Population Growth and Projections in Western Maryland, 1990-2045



Source: Maryland State Data Center


Percentage of population with a bachelor's degree:

- 9.3% - Allegany County
- 20.7% - Maryland
- 18.8% - United States



Population in Allegany County has decreased.

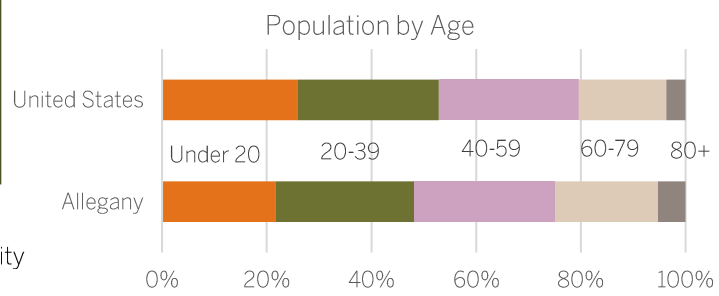
14%: 1970 - 2015



Allegany County is struggling with a declining and older population as well as a low educational level. The demographic trends highlight a real concern for the future workforce able to support job and economic growth.

Race in Allegany County

- 89% White Alone
- 8% Black or African American
- 3% Other



Sources: U.S. Census Bureau, American Community Survey, 2012-2016 estimates



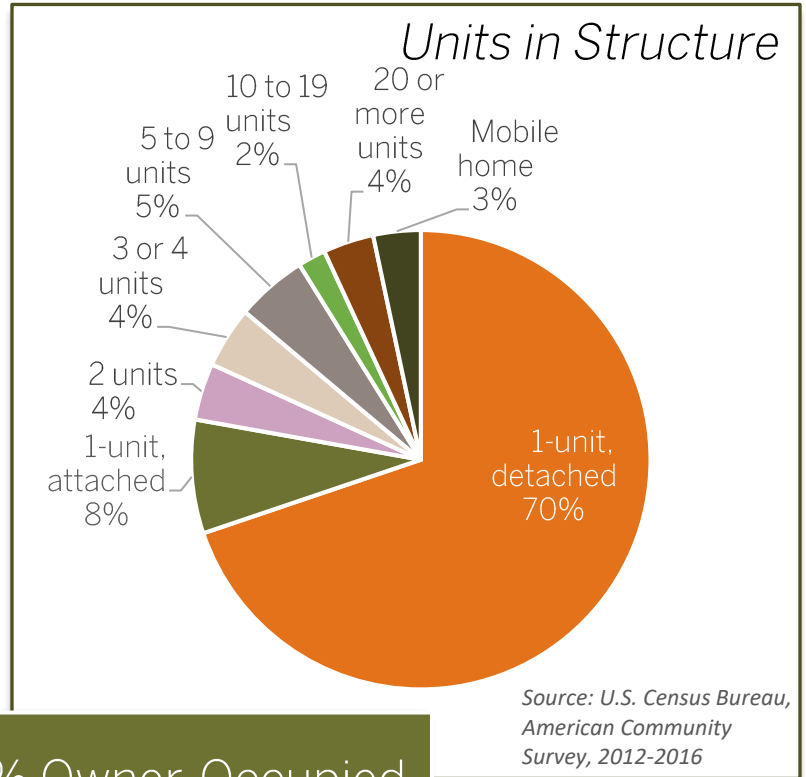
HOUSING OVERVIEW

TOTAL HOUSING UNITS: 33,211

Cumberland: 10,692

Frostburg: 3,541

The majority of housing units in Allegany County are single-family detached homes occupied by the homeowner.



68.4% Owner-Occupied

61% of owner-occupied homes are valued at less than \$150,000

84% of rental costs are less than \$1,000

MEDIAN YEAR BUILT: 1956

33% of homes were built before 1940

Less than **400** homes have been built since 2010

The Real Estate Market is Tight

In the last year, the inventory measure of for-sale units has fallen by 4% while the number of days on market has decreased 64% to 79 days.

Median Listing Price: \$112,642

↓ 5% below January 2010

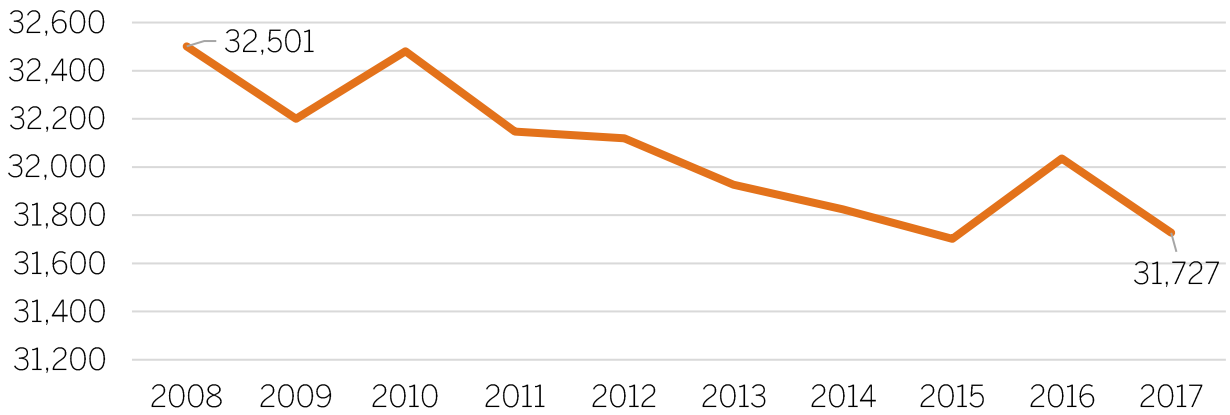
↑ 25% above March 2017

Sources: U.S. Census Bureau, American Community Survey, 2012-2016 estimates; Zillow.com, Accessed 11/1/2018



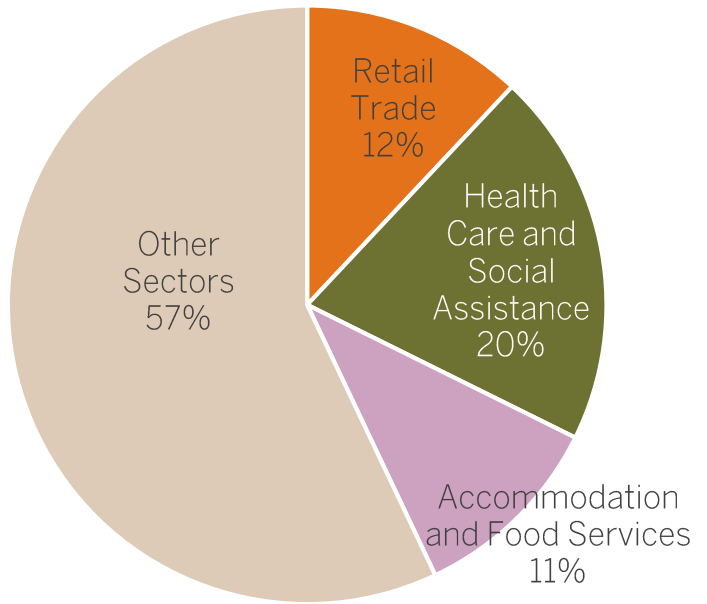
ECONOMY OVERVIEW

Employment in Allegany County



Source: Economic Modeling Specialists International, 2018.3

Total Jobs: 31,727
Percent of Jobs by Sector



The most **UNIQUE*** industries to Allegany County include:

- Other Furniture Related Product Manufacturing (ex: Hunter Douglas)
- Pulp, Paper, and Paperboard Mills (ex: Verso Corporation)
- Household and Institutional Furniture and Kitchen Cabinet Manufacturing (ex: American Woodmark)
- Rail Transportation (ex: CSX Transportation)
- Cable and Other Subscription Programming (ex: Atlantic Broadband)

Source: Economic Modeling Specialists International, 2018.3

*Identified by Location Quotient, which compares the percentage of the County's jobs in the industry to the percentage of US jobs in the industry.

Largest Industries by Employment

1. Restaurants and Other Eating Places
2. General Medical and Surgical Hospitals
3. Education and Hospitals (Local Government)
4. State Government, Excluding Education and Hospitals
5. Education and Hospitals (State Government)



TOURISM OVERVIEW



NATIONAL TRENDS

In 2017, the travel industry generated **\$2.4** trillion for the U.S. economy, supporting **15.6** million American jobs. **1 in 9** U.S. jobs (private sector) directly and indirectly rely on the travel industry (U.S. Travel Association).

ALLEGANY COUNTY

Allegany County saw a small **decrease** in tax revenue in 2017. Total revenue generated from hotel/motel tax in Allegany County has **increased since 2014** and remained over \$1 million for the second year in a row.

MARYLAND TRENDS

In 2017, Maryland tourism generated **\$2.4** billion in state and local taxes, as a result of **42.5** million statewide visitors.

LOCAL TOURISM ASSETS

Rocky Gap Lodge & Golf Resort is one of the largest employers in the region

\$17.7 Billion Spent on Maryland Tourism in 2017 (2.1% increase from previous year)

Rocky Gap State Park & Casino are the major source of tourist traffic and tourist dollars in Allegany Region.

- **Transportation** (\$5.5 Billion spent)
- **Recreation** (\$2.4 Billion spent)
- **Retail** (\$2.4 Billion spent)
- **Lodging** (\$3.4 Billion spent)
- **Food & Beverage** (\$4.0 Billion spent)

Great Allegheny Passage (GAP) Trail offers 150-miles of trail that spans two states and runs through Cumberland, MD.

Western Maryland Scenic Railroad provides a variety of short trips between Frostburg and Cumberland.

MAJOR TOURISM CATEGORIES

Cultural Heritage Tourism

76% of all U.S. leisure travelers participate in cultural and/or heritage activities while traveling (2013 Cultural & Heritage Traveler Study).

Tours, and activities, historic and heritage experiences saw a +125% growth in bookings in 2018 (Trip Advisor).

Outdoor Recreation & Tourism

Nearly half (48.8%) of the U.S. population participated in at least one outdoor activity in 2016 (2016 OIA Outdoor Participation Report).

Craft Food & Beverage Tourism

About half of all leisure travelers travel to learn about or enjoy unique and memorable eating and drinking experiences, which has increased by 11% since 2006 (Mandala Research 2013).



Chapter 3: Community Engagement Summary



As part of the planning process, perspectives from key stakeholders and the public were gathered through the multiple methods.

- Four focus groups were held on the topics of infrastructure and utilities, tourism, education and workforce, and housing. Focus groups were supplemented with interviews of key individuals that were unable to attend the meetings.
- Two public visioning sessions were held in Cumberland and Frostburg on two consecutive evenings. The sessions featured activity tables designed to gather feedback on topics aligning with the focus groups and also included a panel session with economic development and business leaders in the County.
- An electronic survey was distributed to the public and received 373 responses.

Engagement by the Numbers

- 4 Focus Groups with around 20 total attendees
- 2 Public Visioning Sessions
- 373 online survey responses

KEY FINDINGS

The key findings described below are based on input received from focus groups, public meetings, and online survey responses. These findings do not necessarily represent the perspectives of the Consultant Team or Allegany County. This engagement effort is designed to gauge public perception and gather input on the plan. However, the findings do not represent a complete and complex view of the residents in the County and are likely skewed to represent the most engaged and participatory citizens.



Housing

Housing in Allegany County is aging and blighted. Many residents desire additional single-family housing and townhomes. Redevelopment and repairs are needed as many homes are poorly maintained. Housing for seniors and young adults needs to be prioritized. Innovative models are needed for financing redevelopment as increased demolition and permitting costs are making it difficult for the market to catch up.



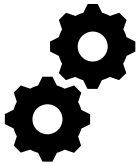
Workforce

Workforce and talent attraction are major concerns for the community with a decreasing population making it difficult for businesses to find skilled workers. Public feedback suggests that the major educational institutions, Frostburg State University, Allegany College of Maryland, and Allegany County Public Schools are crafting great initiatives to connect workers to jobs, but more efforts need to be made to attract workers to Allegany County through quality housing and amenities.



Infrastructure

Key infrastructure concerns for residents include better access to affordable broadband through competition, the lack of commuter air service, and the absence of public transit. Specific vehicle transportation issues exist within the cities of Cumberland, Frostburg, and Cresaptown. Sewer and water are low priorities for the general public. However, focus groups identified key projects related to improvements along Baltimore Street and an overflow tank needed to address issues caused by the shared water and sewer system in Cumberland.



Industry

Residents identified industry opportunities related to information technology, healthcare, advanced manufacturing, transportation and warehousing, and tourism. The potential for drone activities at the Cumberland Regional Airport was also suggested. Workforce is the biggest challenge to many businesses in the community as well as infrastructure and a lack of housing and amenities.



Tourism

Many residents recognize the importance of tourism to Allegany County, but many are unaware of the key assets. Additionally, some residents are concerned about the tourism industry providing low wages. Industry leaders have begun to recognize the importance of additional internal and external marketing of the activities. Greater collaboration between different tourism resources was recommended. Restaurants, additional retail options, and family activities were the highest ranked missing tourism assets.



Business

Residents indicated that supportive services for businesses and startups in the County is generally average to poor. Additional programs aimed at encouraging entrepreneurship are needed, as well as tax incentives, better financing, and an overall streamlined permitting process. Lack of a skilled workforce was often identified as the greatest challenge for business growth in the County.

FOCUS GROUPS

The focus groups gathered information related to current assets, challenges, priorities, and strategies around each topic area. Overall, the sessions highlighted some of the unique partnerships and activities currently taking place and identified outstanding needs. Key challenges highlighted throughout the sessions were related to housing and workforce. The lack of available housing, particularly aimed at young professionals, was mentioned as an impediment to attracting workers to the area. Enhancing the downtown areas of Cumberland and Frostburg were key action items related to tourism and housing, including the removal of blight and creating a better connection from the trails to downtowns. Educational leadership in the County is strong, with Frostburg State University, Allegany College of Maryland, and Allegany County Public Schools working together to create programs that connect students with the skills needed to find jobs within the community. Additional partnerships are needed in the tourism sector in which there are a lot of assets that are not being collaboratively marketed. Additionally, there is a need for internal marketing that promotes the unique assets in Allegany County and provides residents with a vision for the future of the County as it relates to housing redevelopment, career pathways, restaurants and activities, and the opportunities to increase each resident's quality of life.


PUBLIC VISIONING SESSIONS

Public visioning sessions held in Cumberland and Frostburg included activities focused on four major themes of Housing, Industry, Infrastructure, and Tourism. Activities allowed individuals to identify the top challenges and opportunities in each category. Infrastructure and housing challenges were represented visually using maps of Allegany County. After the activity engagement, a panel featured questions around each of these topics and took resident questions to close out each public visioning session. Residents identified key assets in Allegany County including major educational institutions, a natural landscape, and a variety of anchor businesses that support existing tourism. Challenges identified through these activities included an overabundance of vacant and aged housing and a lack of appropriate housing for young professionals and aging Allegany residents. A need for investment in a variety of activities and amenities to attract and retain new residents as part of a quality of life and workforce strategy came across in multiple open comments and resident feedback. During discussions related to infrastructure, additional broadband service providers were identified as a key need. This issue related closely to the type of amenities identified to attract a high-skilled labor force and tech related industries.

ONLINE SURVEY

Survey respondents generally indicated satisfaction with Allegany County when it came to the topics of safety, County services, overall employment opportunities, and affordable housing. However, residents indicated the need for higher-paying jobs and the removal of blight and dilapidated housing. Residents identified additional supportive services and programs for businesses as a priority, as well as attracting a younger workforce through modern housing and amenities. Target industries for attraction included Information Technology, Healthcare, Advanced Manufacturing, Transportation and Warehousing, and Tourism. Residents also emphasized the need for new and innovative ideas to be identified through the Strategic Plan with an emphasis on implementation.





Chapter 4: SWOT Analysis

ALLEGANY COUNTY SWOT ANALYSIS

STRENGTHS

1. Anchor institutions such as Allegany College of Maryland and Frostburg State University provide high-quality educational opportunities for the local workforce.
2. A variety of natural assets currently draw tourists to Allegany County on an annual basis.
3. Existing cultural and historic sites serve as a base for continuing quality of place efforts in the County.

Allegany County's key assets include highly involved anchor institutions, an abundant natural landscape for outdoor recreation, and cultural and historic attractions that enhance overall quality of place efforts within the County.

The Allegany College of Maryland and Frostburg State University are the County's primary higher educational institutions, offering a variety of education and training programs that have established them as key institutions for County residents and employers alike. Key offerings include FSU's nursing program that now offers a local option to earn a Bachelor of Science in Nursing. Other training programs position the County to develop a competitive and talented workforce, such as the state-sponsored P-tech Program that encourages young residents to pursue a career in the growing cybersecurity sector.

Additionally, the County's natural landscape provides a strong base of tourist attractions that offer visitors and residents the opportunity to engage in outdoor recreational activities. Major natural tourism assets include the Great Allegheny Passage (GAP Trail), C&O Canal Towpath, and Rocky Gap State Park. Cultural and historic sites include Downtown Cumberland and Downtown Frostburg, George Washington's Headquarters, and the Western Maryland Scenic Railroad. These sites, in combination with two local wineries and soon to be two local breweries in Downtown Cumberland and Downtown Frostburg, add to overall quality of place in the County.



WEAKNESSES

1. The lack of diversity in housing type and for-sale availability makes it difficult for Allegany County to attract and retain residents.
2. This adds to a shortage of skilled workers that makes it difficult for Allegany County to attract and retain certain jobs and industries.
3. Economic development organizations in the County struggle with coordinating and aligning scarce resources to better strive towards mutual goals.

Primary weaknesses for Allegany County are a shortage of housing types, a lack of skilled workers, and the need to align resources around economic development efforts. The large majority (70%) of housing units in Allegany County are single-family detached homes. Additionally, due to lack of new construction and low-inventory, for-sale units have fallen by 4% while average number of days on the market has decreased 64% in the last year.

A lack of variety in available housing types may not adequately meet the needs of young professionals and aging Allegany residents. The lack of young professionals and a younger skilled workforce is apparent, hindering the ability of the County to attract additional industry and business to the area.

There are a number of organizations in the County looking at how to address a variety of economic development issues related to business attraction, retention, and expansion; transportation; infrastructure; workforce development; and housing. While these organizations all contribute to economic development efforts in Allegany County, their activities are not strategically aligned to utilize scarce resources in a collaborative way.



OPPORTUNITIES

1. The County's existing tourism base provides opportunities to connect tourists to additional attractions within the County and enhance the visitor experience.
2. Existing industrial parks and County-owned buildings provide focal points for business attraction efforts.
3. Downtown and Main Street Corridors are two well-established locations that provide highly visible locations for strategic revitalization and quality of place efforts.

The existing tourism base, industrial parks, and Downtown and Main Street corridors provide opportunities for the County to strategically attract economic activities. In recent years, Allegany County has seen increased tourism revenue attributable to the GAP Trail, C&O Canal Towpath, and the recent development of the Rocky Gap Casino & Resort.

While these attractions draw visitors to the County, additional marketing can be leveraged to promote lesser-known but equally attractive tourism assets within the County. Examples include the promotion of Downtown Cumberland and Frostburg, the Western Maryland Scenic Railroad, and new development around Canal Place. There are a number of existing industrial parks, shovel-ready sites, and the availability of a County-owned industrial building in Barton Business Park.

This represents an opportunity for attraction of key strategic industries to the County. Downtown Cumberland and Frostburg have historical main streets with capacity for additional investment into business retention and expansion, placemaking efforts, and housing development to increase usage and potential revenue within the County. In particular, the M&T Bank building on Baltimore Street in Cumberland is an example of a property that can anchor redevelopment efforts intended to activate the corridor.



THREATS

1. A declining population threatens Allegany County's ability to meet the workforce demands of existing and future businesses.
2. An aging housing stock adds to an overall issue with blight in Allegany County and negatively impacts median home values in the County.
3. Aging infrastructure and water systems create environmental risks and negatively affect Allegany County's competitiveness in attracting new businesses.

Primary threats to the County's success include a declining population, an aging housing stock, and aging infrastructure. Allegany County's population decreased by 14% between 1970 and 2015, a total of 11,934 residents. Current challenges include both the loss of existing residents, and difficulty in attracting and retaining new residents who come to Allegany County to study and work.

An aging housing stock threatens overall home values in areas of the County by creating blight, particularly in the cities of Cumberland and Frostburg which have dense, aging housing and a large share of renters. In both cities the majority of homes are more than 30 years old. Poor housing and low home values contribute to struggles with attracting and retaining residents within the County. Additional environmental risks of demolishing and rebuilding existing housing due to use of asbestos and lead paint further exacerbate costs in addressing blight issues in the County.

In addition to housing challenges, an aging infrastructure, particularly with water and sewage systems in Cumberland and Frostburg, put pressure on the County's overall ability to meet the demand of new and existing residents and businesses. Specifically, a combined stormwater and wastewater system in Cumberland causes overflow into the Potomac, representing potential environmental risks. Additionally, while Downtown Cumberland and Downtown Frostburg have broadband access, this access does not extend to the rest of the County. A shortage of available service providers and fiber coverage in the County make it difficult to access high-speed reliable internet required by some businesses.



Chapter 5: Goals



GOALS

Based on the findings outlined in the Background and Community Engagement reports as well as the Strengths, Weaknesses, Opportunities, and Threats analysis, four key goals for the execution of the Economic Development Strategic Plan were outlined. These goals were developed based on the following assumptions:

- 1) There is a need to align economic development efforts in the County to promote collaboration, shared goals, leadership, and innovative ideas.
- 2) Workforce and talent attraction and retention are major issues due to declining population trends and a tightening of the labor market.
- 3) The County has a number of unique tourism assets that need to be marketed to a broader audience with a clear, consistent, and coordinated message.
- 4) A lack of housing and quality amenities negatively impacts the ability to attract new residents, especially a younger, more diverse population.

These key findings form the basis of the four broad-based goals outlined in this section of the plan. These goals ultimately tie together the eleven strategies that make up the core of the Economic Development Strategic Plan. Some of the strategies will impact and work towards multiple goals while others only aim to achieve one goal. This chapter will describe the four overarching goals for the Plan and identify which strategies support them as well as the key performance indicators that will ultimately measure progress toward achieving overall goals.



GOAL #1: ECONOMIC DEVELOPMENT PROGRAMMING

Position Allegany County to be a leading regional driver of business and job growth through enhanced economic development programming and partner alignment.



GOAL #2: WORKFORCE ATTRACTION AND RETENTION

Attract and retain a skilled workforce capable of supporting new and existing businesses in Allegany County.



GOAL #3: TOURISM DEVELOPMENT AND REINVESTMENT

Establish Allegany County as a destination for tourists in the Mid-Atlantic region of the United States.



GOAL #4: HOUSING AND INFRASTRUCTURE INVESTMENTS

Invest in housing and infrastructure improvements to position Allegany County competitively in the Western Maryland region.





GOAL #1: ECONOMIC DEVELOPMENT PROGRAMMING

Position Allegany County to be a leading regional driver of business and job growth through enhanced economic development programming and partner alignment.

There are a number of organizations and partners affiliated with economic development efforts within Allegany County. These organizations have different priorities and responsibilities when it comes to advancing economic development efforts within the region. Moving forward, Allegany County, in particular the Department of Economic and Community Development (DECD), should act as the lead organization coordinating economic development efforts when it comes to business attraction, retention, and expansion, entrepreneurial growth, and tourism development.

Other organizations in the region will play key roles in the execution of this goal as the County works to align economic development efforts in order to build capacity and move the needle on business and job growth in a positive, forward direction with consensus agreement from partner organizations. Strategies supporting this goal aim to refine the current business attraction model, with a focus on marketing and communications and the process for generating and managing leads. Additionally, the County should look to build a formal Business Retention and Expansion (BRE) strategy and create a program for supporting and growing local entrepreneurship. Aligning these objectives across the DECD, Cumberland and Frostburg economic development organizations, the local chamber, and other organizations will be a key component of success in promoting this goal.

DISCLAIMER: The following KPIs are being provided for illustration and to produce discussion amongst the Steering Committee and other stakeholders. The KPIs were generated based on TPMA’s work with other communities of similar size and character. It is strongly recommended that the Steering Committee and the Economic Development Roundtable, as noted in Strategy #1 of this plan, evaluate and revise these KPIs on a continual basis as needed.

Goal #1 Supportive Strategies

Key Performance Indicators (KPIs)	Initial KPI Targets
Strategy #1: Reinforce and implement roles for economic development organizations along clear objectives and desired outcomes.	
Positive prospect and/or site selector feedback	N/A
Streamlined process from the point of receiving an RFI to a project win (project life cycle)	N/A
Enhanced community support	N/A
Strategy #2: Outline a concerted Business Attraction implementation plan.	
Project wins	1-2 Projects per year



Key Performance Indicators (KPIs)	Initial KPI Targets
Jobs created	25-50 Jobs per year
Average wage of new jobs created	\$45,000 - \$50,000
Capital investment	\$500,000 per year
Strategy #3: Develop a formal Business Retention & Expansion (BRE) Program.	
BRE visits	50-75 Visits per year
Project wins	3-5 Projects per year
Jobs created	15-20 Jobs per year
Jobs retained or upskilled	15-20 Jobs per year
Average wage of new and retained jobs	\$45,000-\$50,000
Capital investment	\$500,000 per year
Strategy #4: Collaborate with private sector leadership to establish committees to advance the County's economic development efforts.	
Increased private sector participation in County economic development efforts	Engage 5 New Firms for Committee Participation
Attendance at committee meetings	75% Attendance Rate at Each Meeting





GOAL #2: WORKFORCE ATTRACTION AND RETENTION

Attract and retain a skilled workforce capable of supporting new and existing businesses in Allegany County.

Allegany County’s population loss and the need for a skilled workforce is likely the single most pressing issue that currently hampers the County’s ability to sustain economic growth. The County, and in particular the cities of Cumberland and Frostburg, must address this issue head on in order to understand the complex nature of the problem and the multifaceted ways of addressing it. In today’s economy, as young, skilled workers increasingly concentrate in major urban areas, the competition for talent is fierce. Allegany County cannot afford to be complacent in this competition. While there are inherent challenges, the County has a number of interesting assets that must be leveraged in order to attract and retain the type of people that value the lifestyle that Allegany County provides. Demographic trends are constantly changing, and different people have different expectations, desires, and decision factors when it comes to choosing a place to live. Allegany County must embrace its unique historic, small-town, outdoor recreational lifestyle in order to attract a workforce that will be drawn to what Allegany County has to offer.

Developing a vision for what Allegany County can offer to its residents will lay the foundation for growth, but the County must consistently and strategically sell this vision through coordinated talent attraction and retention strategies. Leveraging partnerships with local educational institutions and employers will help the County reach potential residents. Along with a cohesive approach to messaging the quality of life available, Allegany County must also strategically invest in housing, amenities, and infrastructure that will help improve quality of place in the County needed to attract workers. A key component of the struggle to attract workers to the County is the lack of available suitable quality housing which must be addressed in order to achieve this goal.

Goal #2 Supportive Strategies

Key Performance Indicators (KPIs)	Initial KPI Targets
Strategy #5: Engage housing developers and financiers from external markets such as Baltimore, Washington DC, and Pittsburgh to provide localized models for funding new and redeveloped housing.	
Number of inquiries or engagements with housing developers not currently operating or based in Allegany County	5 -10 Inquiries over 2-3 years
Successful maintenance of up-to-date inventory of potential housing projects for development and redevelopment	N/A
Instances of sharing marketing materials with external developers	10-15 Instances over 2-3 years
Total number of new housing projects completed in Allegany County	2-3 Projects over 5 years



Key Performance Indicators (KPIs)	Initial KPI Targets
Strategy #7: Develop a talent retention strategy aimed at local high school, community college, and university students.	
Retention rate as measured by graduate survey	50-60%
Number of businesses connected to workforce services	10-15 Businesses over 2-3 years
Number of graduates from advanced career pathway programs	25-30 Graduates over 2-3 years
Number of retained residents offered financial incentives	5-10 Residents over 5 years
Strategy #8: Create a talent attraction strategy aimed at recruiting new and returning residents to the County.	
Number of employers provided recruitment materials to distribute to potential employees	30-50 over 2-3 years
Number of employees that accept jobs after being provided additional recruitment materials	10-15 Employees over 2-3 years
Number of former residents attracted through outreach	10-15 Former Residents over 5 years
Number of employers offering relocation assistance	3-5 Employers over 5 years
Strategy #11: Revitalize Downtown Cumberland and Frostburg through concerted efforts to build quality of place and renovate and improve housing and infrastructure.	
Number of signage and wayfinding improvements made to pedestrian paths implemented in downtown Cumberland and Frostburg including installation of new or improvement of existing signage	5-10 Improvements over 5 years
Number of new investments made in Opportunity Zones	2-3 Investments over 5 years
Total number of County sponsored events or festivals	5-10 Events over 5 years
Increase in downtown purchases and business patronage	2-3% Increase over 5 years
Total number of rehabbed units above Baltimore Street	3-5 Units over 5 years





GOAL #3: TOURISM DEVELOPMENT

Establish Allegany County as a destination for tourists in the Mid-Atlantic region of the United States.

Allegany County’s unique location and natural landscape make it an ideal location for tourism development. At the intersection of the Great Allegheny Passage (GAP) and Chesapeake & Ohio (C&O) Towpath trails, Allegany County is natural destination for travelers that want to explore the outdoors and visit the cultural assets of this historic community. These natural landscape assets have been at the heart of the tourism industry for decades, and the community has invested in growing and strengthening them, but more work is needed to truly establish the County as a major tourism market in the Mid-Atlantic region.

Building better connections to the trails and the downtown areas of Cumberland and Frostburg will enhance visitor experience and draw hikers to the other tourism assets in the community. Downtown investments that focus on quality of place and improved walkability and amenities will further this effort by making these locations into key destinations for travelers. Building a coordinated marketing effort that combines multiple activities and tourism assets can better draw visitors from the nearby major markets, including Baltimore, Washington, D.C., and Pittsburgh. Additionally, developing new tourism products, with a focus on leveraging the existing state parks and efforts aimed at the River Park at Canal Place will help further efforts to create multiple activities for visitors to Allegany County.

Goal #3 Supportive Strategies

Key Performance Indicators (KPIs)	Initial KPI Targets
Strategy #9: Market Allegany County as an overnight trip destination from regional anchors in Baltimore, Washington, D.C., and Pittsburgh.	
Hotel/motel tax revenue	Increase 5% over 5 years
Tourism product visitors	Increase 5% over 5 years
Website traffic (Total visits, pages per visit, average visit duration, bounce rate)	Increase 5% over 5 years
Social media engagement (Number of impressions, engagement rate)	Increase 5% over 5 years
Strategy #10: Enhance existing tourism products, while diversifying and expanding offerings.	
Number of gateway improvements in downtown areas	2-3 Improvements over 5 years
Number of new tourism products developed or marketed	3-5 Products over 5 years



Key Performance Indicators (KPIs)	Initial KPI Targets
Strategy #11: Revitalize Downtown Cumberland and Frostburg through concerted efforts to build quality of place and renovate and improve housing and infrastructure.	
Number of signage and wayfinding improvements made to pedestrian paths implemented in downtown Cumberland and Frostburg including installation of new or improvement of existing signage	5-10 Improvements over 5 years
Number of new investments made in Opportunity Zones	2-3 Investments over 5 years
Total number of events or festivals	5-10 Events over 5 years
Increase in downtown purchases and business patronage	2-3% Increase over 5 years
Total number of rehabbed units above Baltimore Street	3-5 Units over 5 years





GOAL #4: HOUSING AND INFRASTRUCTURE INVESTMENTS

Invest in housing and infrastructure improvements to position Allegany County competitively in the Western Maryland region.

Allegany County is rich with historic assets, with old turn-of-the-century homes along Washington Street in Cumberland, the Western Maryland Scenic Railroad, and the Canal Place Heritage Area. Many of these assets have been preserved and provide a unique cultural experience for both residents and visitors. However, like with any community of its age, Allegany County is in much need of modern housing and infrastructure investments.

Balancing historical preservation while ensuring the County has modern amenities, infrastructure, and housing is a challenge, but one the County (and in particular the cities of Cumberland and Frostburg) must tackle. While the County’s historic charm can attract many residents, investments and improvements are needed not only to attract additional residents, but to improve the quality of life of the existing population.

Changing demographics and global economic shifts have put an emphasis on quality of place and connectivity when it comes to new development. An aging population requires new types of housing development that can support aging in place. Providing existing residents with support to make needed home improvements or helping them find more suitable housing for their needs will ensure that Allegany County residents have adequate housing and help reduce the significant blight challenge in the community.

Goal #4 Supportive Strategies

Key Performance Indicators (KPIs)	Initial KPI Targets
Strategy #5: Engage housing developers and financiers from external markets such as Baltimore, Washington DC, and Pittsburgh to provide localized models for funding new and redeveloped housing.	
Number of inquiries or engagements with housing developers not currently operating or based in Allegany County	5-10 Inquiries over 2-3 years
Successful maintenance of up-to-date inventory of potential housing projects for development and redevelopment	N/A
Instances of sharing marketing materials with external developers	10-15 Instances over 2-3 years
Total number of new housing projects completed in Allegany County	2-3 Projects over 5 years



Key Performance Indicators (KPIs)	Initial KPI Targets
Strategy #6: Develop an owner-occupied home improvement assistance program to encourage renovations of existing housing.	
Total number of applications submitted and processed for home improvement assistance.	8-10 Applications over 2-3 years
Total dollar amount of successfully disbursed funds and number of individual households assisted.	\$160,000-200,000/4-5 households over 2-3 years
Dollar amount of external funding secured.	\$200,000 over 2-3 years
Strategy #11: Revitalize Downtown Cumberland and Frostburg through concerted efforts to build quality of place and renovate and improve housing and infrastructure.	
Number of signage and wayfinding improvements made to pedestrian paths implemented in downtown Cumberland and Frostburg including installation of new or improvement of existing signage	5 -10 Improvements over 5 years
Number of new investments made in Opportunity Zones	2-3 Investments over 5 years
Total number of County sponsored events or festivals	5-10 Events over 5 years
Increase in downtown purchases and business patronage	2-3% Increase over 5 years
Total number of rehabbed units above Baltimore Street	3-5 Units over 5 years
Strategy #12: Expand Residential and Commercial Broadband Coverage in Allegany County	
Total fiber length installed in Allegany County	10-15 miles over 5 years
Number of households and businesses connected to broadband	3-5% Increase in households and increase in businesses over 5 years
Number of anchor institutions served by broadband services	5-8 Institutions 5 years
External funding secured for broadband expansion	1-2 External funding sources within 2-3 years



Chapter 6: Strategies & Action Items

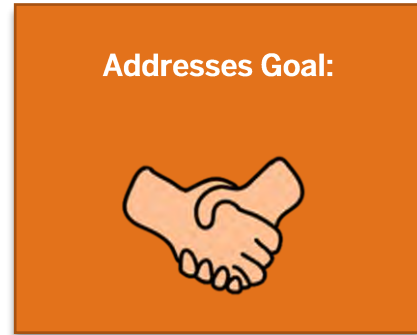


Photo by Farrell Photos

STRATEGY #1:

REINFORCE AND IMPLEMENT ROLES FOR ECONOMIC DEVELOPMENT ORGANIZATIONS ALONG CLEAR OBJECTIVES AND DESIRED OUTCOMES.

As seen in the description table and diagram below, Allegany County has an important network of regional economic development, workforce development, government, tourism, and education partners. These partners support the Allegany County Department of Economic and Community Development (DECD) through direct economic development leads, community and workforce development support, or other resources. The diagram below is an illustrative representation of the County's central network and how it supports the Allegany County DECD and opportunities for mutual benefit. This diagram is non-exhaustive, and the County acknowledges and thanks the countless organizations, businesses, and individuals that support the Allegany County DECD's mission.



While these partnerships are strong and important, it is imperative that a main point of contact for primary-industry economic development is identified. Prospects and site selectors may pass on a community if the project process is cumbersome, lacking in coordination or communication, or if it appears that the community is not aligned in economic development efforts. Businesses make location decisions for many reasons including being risk averse. Communities that lack alignment signal a risk for operational success for a business and may impact a community's success in winning a project.

Additionally, increased alignment between organizations will allow the community to prioritize the investment of scarce resources to avoid duplication of efforts or general inefficiencies. This strategy aims to better understand the goals and priorities of the County's partner organizations to provide guidance on how they can support and contribute to the strategies outlined in this plan. The table below describes each of the organization's roles and responsibilities and current priorities. Additional recommendations regarding long-term strategic organizational changes that could better support regional economic development efforts are also provided below.



ALLEGANY COUNTY ECONOMIC DEVELOPMENT PARTNERS

REGIONAL PARTNERS



Frostburg State University



The Greater Cumberland Committee



Tri County Council
For Western Maryland

Tri County Council
For Western Maryland

STATE PARTNER



Maryland
OPEN FOR BUSINESS

Maryland Department of
Commerce

WORKFORCE & EDUCATION PARTNERS



Allegany County
MARYLAND

Allegany County Workforce
Development Specialist



ALLEGANY COLLEGE
of MARYLAND

Allegany College
of Maryland



**WESTERN
MARYLAND
CONSORTIUM**

Western Maryland
Consortium

ALLEGANY COUNTY



DECD

DEPARTMENT OF ECONOMIC & COMMUNITY DEVELOPMENT

Allegany County
Department of Economic
and Community
Development

DOWNTOWN/MAIN STREET DEVELOPMENT



Canal Place Preservation &
Development Authority



Downtown Cumberland
Business Association



Downtown Development
Commission (Cumberland)



FROSTBURGFIRST
FrostburgFirst


TOURISM




**ALLEGANY
COUNTY**
MOUNTAIN SIDE
OF MARYLAND

Allegany County Tourism

LOCAL ECONOMIC DEVELOPMENT ORGANIZATIONS



Cumberland Economic
Development Corporation



City of Frostburg
Community Development

LOCAL DEVELOPMENT ORGANIZATIONS

the Allegany County
CHAMBER

Allegany County
Chamber of Commerce



Cumberland Area
METROPOLITAN PLANNING ORGANIZATION
Cumberland - Frostburg - Allegany County

Cumberland Area
Metropolitan Planning
Organization



MOUNTAIN MARYLAND
TOURISM • COMMERCE • PARTNERSHIP

Cumberland Allegany
County
Industrial Foundation



ORGANIZATIONAL PRIORITIES

The table below provides a snapshot of the organizations in Allegany County that are focused on various aspects of economic and community development and which organizations are addressing which topics. This provides the County and other organizations an idea of which organizations should be involved in conversations and working groups on different topic areas and also where additional collaboration and/or efficiencies could take place based on overlapping goals.

Organization	Business Attraction	Business Retention and Expansion	Innovation and Entrepreneurism	Industrial Development	Marketing	Economic Development Policy	Workforce Development	Talent Attraction	Talent Retention	Housing Development	Main Street Development	Tourism	Transportation and Infrastructure
Allegany County Department of Economic and Community Development	✓	✓	✓	✓	✓	✓		✓	✓	✓			✓
Maryland Department of Commerce	✓				✓	✓							
Allegany County Tourism					✓							✓	
City of Frostburg Community Development										✓	✓		✓
Cumberland Economic Development Corporation	✓	✓	✓			✓				✓	✓		
Frostburg State University	✓	✓	✓		✓		✓	✓	✓				
The Greater Cumberland Committee					✓	✓	✓						✓
Tri County Council for Western Maryland	✓	✓	✓			✓	✓						✓



Organization	Business Attraction	Business Retention and Expansion	Innovation and Entrepreneurism	Industrial Development	Marketing	Economic Development Policy	Workforce Development	Talent Attraction	Talent Retention	Housing Development	Main Street Development	Tourism	Transportation and Infrastructure
Allegany County Workforce Development Specialist							✓						
Allegany College of Maryland					✓		✓		✓				
Western Maryland Consortium							✓						
Allegany County Chamber of Commerce		✓			✓	✓							
Cumberland Area Metropolitan Planning Organization													✓
Cumberland Allegany County Industrial Foundation	✓			✓		✓							
Canal Place Preservation & Development Authority											✓	✓	
Downtown Cumberland Business Association					✓						✓	✓	
Downtown Development Commission (Cumberland)										✓	✓	✓	
FrostburgFirst					✓						✓	✓	



ALLEGANY COUNTY ECONOMIC DEVELOPMENT PARTNERS & ROLES

The following section provides an overview of the key roles and responsibilities for each organization outlined as well as their current priorities.

ALLEGANY COUNTY DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT

Geography of Focus: Allegany County



Organizational Roles and Responsibilities:

- Lead contact organization, starting with the Director, for primary industry economic development
- Lead coordinator with the Maryland Department of Commerce
- Site selection
- Incentives and lending programs
- HubZones, Enterprise Zones, and Opportunity Zones
- Manages the County's Tourism Office

Current Priorities

With the finalization of this Economic Development Strategic Plan, the Allegany County DECD is looking to create a forward-looking plan for economic development in the County and strengthen its role as the leader for economic development business attraction, retention, and expansion. Additionally, the DECD is strategically identifying partners to lead efforts around talent attraction, retention, and community development that will work to strengthen the County's ability to attract business. As part of these efforts, the DECD may provide strategically targeted funding resources in order to support community growth that aligns with the overall vision and effort of this Strategic Plan.

ALLEGANY COUNTY TOURISM

Geography of Focus: Allegany County



Organizational Roles and Responsibilities:

- Lead contact and organization for tourism in Allegany County

Current Priorities

Allegany County Tourism is a division of the Department of Economic and Community Development focused on promoting and growing tourism in the County. Current priorities include increasing overnight trips to the County, fostering increased collaboration between tourism related organizations in the County, continuing to increase the marketing presence of the tourism assets to a broader audience, and growing a local understanding of the importance of the industry to the economy of Allegany County.



MARYLAND DEPARTMENT OF COMMERCE

Geography of Focus: Maryland

The region covered by the representative for Allegany County also includes Garrett and Washington Counties.



Organizational Roles and Responsibilities:

- State lead on economic development working in coordination with the Allegany County Department of Economic and Community Development

Current Priorities

The Maryland Department of Commerce works to connect Allegany County with potential businesses looking for sites to locate within Western Maryland. In this role, the Department focuses on building a strong collaboration with the DECD to position the County to better attract businesses, preparing and presenting potential incentive packages, and working on behalf of the County to communicate with prospective businesses.

CITY OF FROSTBURG COMMUNITY DEVELOPMENT

Geography of Focus: Frostburg



Organizational Roles and Responsibilities:

- City economic development & community development organization for Frostburg, MD
- Incentives
- Permit facilitation
- Special projects: infrastructure, redevelopment, corridor work

Current Priorities

The City of Frostburg Community Development department is focused on continuing to grow a strong quality of place through community development initiatives. In particular, the City is continuing to strengthen the central business district through the support of Main Street businesses and the preservation of historic buildings. Improvements to the Braddock Road Corridor including sidewalk and bike lanes, and a roundabout will increase walkability for Frostburg State University students. These improvements will also look to improve the overall gateway into the community, spurring commercial and mixed-use development in the area. Lastly, the growth of the Frostburg Business Park with five new parcels will help attract new light and advanced manufacturing.



CUMBERLAND ECONOMIC DEVELOPMENT CORPORATION

Geography of Focus: Cumberland



Organizational Roles and Responsibilities:

- Privatized economic development & community development organization for Cumberland, MD
- Projects are focused on infrastructure and larger initiatives
- Manufacturers Roundtable and IT initiatives
- Site selection
- Incentives and lending programs

Current Priorities

The Cumberland Economic Development Corporation is focused on a number of community development initiatives aimed at strengthening livability in the City. Infrastructure improvements and design enhancements on Baltimore Street will help support additional businesses along a key walkable commercial corridor. A Downtown Development Plan will look to build better connections between Canal Place and the intersection of the GAP and C&O trails to Baltimore Street and the rest of downtown. Lastly, a housing study will take a comprehensive look at the state of the existing housing stock in the City of Cumberland in order to understand the key challenges and identify the areas in need of support and/or redevelopment.

FROSTBURG STATE UNIVERSITY

Geography of Focus:



Bedford County, PA; Somerset County, PA; Allegany County, MD; Garrett County, MD; Mineral County, WV

Organizational Roles and Responsibilities:

- Post-secondary education providing Bachelor and Graduate degree programs

Current Priorities

Frostburg State University is currently working on four key areas of focus:

- 1) Building intellectual capacity through connections with employers, nonprofits, and local organizations to help grow capacity within the region as well as continuing the core mission of educating students
- 2) Sparking innovation from within Frostburg State University and in partnership with local groups
- 3) Incubating businesses through the creation of a new Applied Research and Innovation Center
- 4) Increasing investment in firms by attracting and sustaining capital into the community.

Frostburg State University has also started gathering a group of key regional stakeholders interested in economic development issues in Bedford, Somerset, Garrett, Allegany, and Mineral



counties. This group is looking to accomplish a few key goals related to economic development, including creating a regional identity and vision and selecting an industry to focus business attraction, retention, expansion, and entrepreneurial support. The ultimate goal of this effort will be to create a marketing plan to support the growth of the regional economy both internally and externally.

THE GREATER CUMBERLAND COMMITTEE



Geography of Focus:

Bedford County, PA; Somerset County, PA; Allegany County, MD; Garrett County, MD; Hampshire County, WV; Mineral County, WV

Organizational Roles and Responsibilities:

- Regional organization supporting infrastructure and policy initiatives

Current Priorities

The Greater Cumberland Committee (TGCC) is currently going through a strategic planning process. They have a new executive director and are looking at how to continue and expand their current role as a key regional convener for the public and private stakeholders in the tri-state area that the organization serves. The TGCC is working on implementing the findings and outcomes from the I-68 Partnership Study as well as supporting other key infrastructure efforts designed to connect the region.

TRI-COUNTY COUNCIL FOR WESTERN MARYLAND



Geography of Focus:

Allegany County; Garrett County; Washington County

Organizational Roles and Responsibilities:

- Regional funding intermediary for the US Economic Development Administration, Appalachian Regional Commission, and Small Business Administration programs

Current Priorities

As the designated Economic Development District for the U.S. Department of Commerce's Economic Development Administration, the Tri-County Council is responsible for the region's Comprehensive Economic Development Strategy (CEDS), which is updated every five years. The current CEDS has the following strategic initiatives:

- 1) Broadband and High Speed Infrastructure and Access
- 2) Leverage Assets to Increase Competitiveness
- 3) Coordination Between High Schools, Colleges, and Employers for Workforce Training, Agriculture and Economic Development
- 4) Infrastructure Improvements
- 5) Entrepreneurship and Small Business



ALLEGANY COLLEGE OF MARYLAND

Geography of Focus:

No defined geography of focus



Organizational Roles and Responsibilities:

- Customized workforce training for primary industry employers
- Apprenticeship facilitation
- Education Remediation
- Dual enrollment programs

Current Priorities

The Allegany College of Maryland outlines five key priorities in its 2015-2020 Strategic Plan. These priorities are:

- 1) Student Success and Access: Allegany College of Maryland develops and delivers quality academic offerings, services and activities that are accessible, affordable and flexible to help students achieve their goals.
- 2) Organizational Development and Support: Allegany College of Maryland enhances the learning and working environment by valuing, supporting and recognizing a diverse and highly qualified faculty and staff.
- 3) Community: Allegany College of Maryland leads and collaborates with business, educational, nonprofit and governmental agencies to enhance student opportunities and contribute to workforce development for the region and the global economy.
- 4) Resource Management: Allegany College of Maryland prudently applies resources to enhance teaching, learning and working.
- 5) Planning and Assessment: Allegany College of Maryland integrates planning and assessment of programs, services, and resources to continuously improve student learning, student success and institutional effectiveness.

WESTERN MARYLAND CONSORTIUM

Geography of Focus:

Allegany County; Garrett County; Washington County



Organizational Roles and Responsibilities:

- Workforce Development Board coordinating the workforce needs for Allegany County

Current Priorities

As the regional workforce development agency, Western Maryland Consortium works to connect job seekers with local employment opportunities in the region. The Consortium provides the following services to the job seekers:

- Job Search Assistance
- Resume Development



- Internet Job Search
- Career Information
- Interest Testing and Evaluation
- Case Management
- Workshops
- Skill Training

The Consortium also supports local employers by finding employees with the right skills for open positions and by providing funding for on-the-job and incumbent worker training.

CANAL PLACE PRESERVATION AND DEVELOPMENT AUTHORITY

Geography of Focus:

The Allegheny County Heritage Area currently encompasses all of heritage assets in Allegheny County, including the Heritage Area in Frostburg. Current focus is on development near Canal Place in Cumberland.



Organizational Roles and Responsibilities:

- Oversees the preservation, development, and management of the Canal Place Preservation District

Current Priorities

The Canal Place Preservation and Development Authority is focused on expanding the boundaries of the Heritage Area in order to ensure the area is inclusive of all of the resources in the County. The Authority is also trying to establish a regional identity for the heritage area and market the area as part of the Mountainside of Maryland brand. Ensuring the appropriate development takes place, in particular focusing on the area of the River Park at Canal Place project and the re-watering of the C&O Canal is also a key priority. Lastly, the Authority is focused on maintaining the necessary funding and staff and building partnerships in order to activate its goals.

DOWNTOWN CUMBERLAND BUSINESS ASSOCIATION

Geography of Focus: Downtown Cumberland



Organizational Roles and Responsibilities:

- Develops, sustains, and enhances Downtown Cumberland as a cultural, retail, and professional heart of the community

Current Priorities

The Downtown Cumberland Business Association promotes the businesses, events, and activities available in the downtown area of the city to visitors. Focusing on marketing these activities to encourage new and returning visitors is a key priority especially during the construction phase of the Baltimore Street project.



DOWNTOWN DEVELOPMENT COMMISSION (CUMBERLAND)

Geography of Focus: Downtown Cumberland



Organizational Roles and Responsibilities:

- Prepares and recommends to the Mayor and City Council a comprehensive plan for the design, construction, operation, and maintenance of the downtown Cumberland Mall

Current Priorities

The Downtown Development Commission in Cumberland is currently focused on the effort to redevelop Baltimore Street and how to assist business owners during the construction phase of the project. The Commission is also looking at how to better connect Canal Place to downtown. This effort is combined with the need to program new spaces and better attract population to the downtown area during the day and evening hours. Lastly, the Commission is working to improve the George Street parking garage to ensure it is better utilized.

FROSTBURGFIRST

Geography of Focus: Downtown Frostburg



Organizational Roles and Responsibilities:

- A Main Street organization focused on economic vitality, design, community transformation, organization, and promotion of Downtown Frostburg

Current Priorities

FrostburgFirst focuses on supporting and growing Downtown Frostburg through a variety of development and placemaking efforts. Current projects include increasing signage, banners, and wayfinding in the downtown area of Frostburg to improve the experience of visitors to the area, compiling business directories and preparing maps, operating the trolley program that connects the Western Maryland Scenic Railroad to Main Street, and sponsoring various events aimed at drawing in more visitors. FrostburgFirst also holds the monthly Coffee On Main Street Gatherings that allow local business owners to discuss any issues that need to be addressed.

ALLEGANY COUNTY CHAMBER OF COMMERCE

Geography of Focus: Allegany County



Organizational Roles and Responsibilities:

- Voice for the business community in Allegany County
- Legislation advocacy
- Initiatives focused on career training and education
- Participates in engagement with economic development prospects and projects



Current Priorities

The Allegany County Chamber of Commerce is currently focused on providing resources to local businesses in order to help grow job opportunities within the community. The Chamber focuses on promoting the live and work aspects of the County as well as encouraging leadership in the community through the Leadership Allegany! Program. The Chamber has committees related to Economic Development, Education, Finance, and Legislation that support private sector business growth in the County.

CUMBERLAND AREA METROPOLITAN PLANNING ORGANIZATION



Geography of Focus:

Allegany County, MD; Mineral County, WV

Organizational Roles and Responsibilities:

- Federal and State designated regional transportation planning body that covers urbanized portions of Allegany County, MD and Mineral County, WV, including the Cities of Cumberland and Frostburg.

Current Priorities

The Cumberland Area Metropolitan Planning Organization recently adopted the Cumberland Area Transportation Improvement Program. The plan outlines key projects for FY2019-FY2020, including the US 220 and MD 53 Corridor Study, a number of bridge replacements and rehabilitations, and the Baltimore Street Town Center project.

CUMBERLAND ALLEGANY COUNTY INDUSTRIAL FOUNDATION



MOUNTAIN MARYLAND
TOURISM • COMMERCE • PARTNERSHIPS

Geography of Focus:

Allegany County; Garrett County

Organizational Roles and Responsibilities:

- Privately funded organization focused on industrial development and economic development growth
- Organize annual PACE reception in Annapolis for local economic development officials to meet with State and Federal partners to discuss priorities

Current Priorities

The Cumberland Allegany County Industrial Foundation (CACIF) currently funds and organizes the annual PACE reception in Annapolis. This reception is designed to connect leaders in Allegany and Garrett counties with state and federal partners in order to share overall economic development goals and priorities. CACIF also offers some funding for other projects where possible.



REGIONAL ORGANIZATIONAL ALIGNMENT

Based on review of the organizations' priorities, one key finding emerged. There are a few regional organizations focused on economic development and/or transportation and infrastructure efforts that are not performing the traditional functions of a regional economic development organization (REDO). These include the Greater Cumberland Committee (TGCC) and the Tri-County Council for Western Maryland as well as a new partnership focused on economic development efforts spearheaded by Frostburg State University.

A clear challenge related to these organizations' overall scope of activities and priorities involves their different geographies of focus. The broad tri-state areas covered by efforts from TGCC and Frostburg State University's new efforts look to truly incorporate a regional strategy into economic development, while the more narrowly focused Tri-County Council addresses issues focused in Maryland.

The Greater Cumberland Committee has a broad-based regional focus, including significant areas of West Virginia, Pennsylvania, and Maryland. This focus could allow the organization to expand its economic development, transportation, education, and energy focus to include business attraction and marketing efforts. As TGCC is currently in a strategic planning process, discussions regarding its scope of activities and how it could become the leader in marketing and economic development for the region should take place. Combining this effort with that of Frostburg State University would create a landing space for the execution of the plan that emerges from this partnership.

Some key organizational changes may need to take place for TGCC to take on this broader role:

- A re-branding effort should identify the key assets that connect the region together. Frostburg State University, TGCC, and other regional partners are already embarking on this initiative.
- An assessment of the appropriate funding model for supporting the organization should take place. Currently, TGCC relies largely on private sector funding. Developing a service model for public sector participation may allow local economic development organizations to rely more heavily on TGCC for marketing activities.
- A best practice analysis and assessment for multi-state regional economic development organizations should take place to understand the unique challenges and innovations that could take place with this model. With different tax structures and incentives across Pennsylvania, Maryland, and West Virginia, business attraction and site selection efforts become more difficult and require additional local support and clearly defined roles for regional collaboration.

Despite these challenges and the necessary changes needed for implementation, increased regional collaboration remains a key priority for streamlining economic development efforts in the area. Collecting scarce resources into one centralized marketing effort will help each dollar go further. Additionally, new business and economic and population growth in one area of this region can help trigger growth in all areas of the region.



Action Items

Action Item #1: Affirm the Main Point of Contact

Affirm that the Allegany County Director of Economic and Community Development is the main point of contact for primary industry economic development. This should be formalized through local and regional press, confirmation with the State of Maryland Department of Commerce, and should include direct outreach to site selectors.

The process to confirm that the Allegany County Director of DECD is the main point of contact for primary industry economic development should be subtle but clear. There are varying degrees of how direct or subtle this should be.

- **Maryland Department of Commerce:** It is easy to directly confirm the main point of contact with the Maryland Department of Commerce. The Director should meet with the regional representative to express this in relation to the aligned strategies of this Strategic Plan. The Director should use this Plan to continue to strengthen the relationships with the Maryland Department of Commerce and define the County's aligned economic development roles and responsibilities.
- **Combined Press Release:** If coinciding with the initiation or completion of a major economic development project or activity, a combined press release announcing the project and reiterating the Director of DECD's role as the main point of contact for primary industry economic development efforts in the County could generate additional media attention. The Allegany County Director of DECD would lead any interviews in response to the press release.

Action Item #2: Allegany County Economic Development Partners Roundtable

Establish a formal Allegany County Economic Development Partners Roundtable that will include all relevant economic development partners. The County will set a meeting agenda and the Roundtable will meet between four and six times a year. Ideal participants of the Allegany County Economic Development Partners Roundtable should include:

- Allegany County DECD
- Allegany County Tourism
- Maryland Department of Commerce Regional Representative
- Cumberland Economic Development Corporation
- City of Frostburg Community Development
- The Greater Cumberland Committee
- Tri County Council for Western Maryland
- Allegany County Chamber of Commerce
- Allegany College of Maryland
- Frostburg State University

Allegany County DECD may include additional partners from the list of Economic Development Partners listed above should it be determined that additional representation is needed to meet the County's needs.

As mentioned above, alignment is key to successful economic development. One important way to realize alignment is through deliberate and continuous communication between partners.



Economic development cannot be successful in a silo. As the County makes progress toward increasingly aligned economic development activities it must maintain open communication with the State, local economic development organizations, regional partners, and workforce and education partners. Outgoing communication should be designed to maintain appropriate confidentiality when required. A formal and regularly scheduled Allegany County Economic Development Partners Roundtable will enable the County to fully understand local initiatives or infrastructure projects, workforce initiatives, or other projects of regional importance that will be important when working with business prospects. There may be new information that will be helpful to convince a company to invest in the County. There could be new information seen as a potential risk that could be minimized through deliberate communication. Intentional communication strategies will cement the foundation for successful economic development in Allegany County and ensure that relevant actors remain up-to-date.

Action Item #3: Allegany County Economic Development Performance Metrics

Allegany County will establish formal economic development performance metrics and design a framework for assessment and annual updates. The County in partnership with the Allegany County Economic Development Partners Roundtable will encourage accountability by establishing a process for defining and tracking these metrics.

Economic development is successful when it is championed by the community and private and public leadership. A best practice in building support is to establish ambitious, yet realistic metrics for the Allegany County DECD. Setting metrics should be viewed as a positive practice. When accepted, it may provide the opportunity for DECD to clarify needs for any additional support to achieve the agreed upon metrics. Further, it demonstrates that the DECD has a clear focus on achieving success. Every community is different, and the definition of success can vary. However, it is recommended that the Allegany County DECD establish metrics for the department that measure the following indicators on an annual basis:

- Projects Won (where the DECD provided or facilitated some level of assistance)
- Jobs Created
- Jobs Retained (connected to an expansion project)
- Capital Investment
- New Businesses Formed (entrepreneurism)
- Average Wages

Initial targets for these metrics are provided in the Goals chapter and in the Implementation Plan section of this Strategy. These targets are offered as initial guidelines. However, the Allegany County Economic Development Partners Roundtable should refine these targets based on past performance, overall economic trends, and any additional relevant information. The Roundtable will also monitor key performance indicators (KPIs) for the other goals outside of the core economic development performance metrics noted above. Initial targets for each of the KPIs can also be found in the Goals chapter as well as the Implementation Plan section of each Strategy. For some of these metrics, it may be recommended that during the first year of implementation of the plan, the County and the committee track these metrics rather than setting firm goals. This will ensure that there is available data upon which to establish attainable goals for future years of implementation. These KPIs will ensure that activity is moving forward on other initiatives outlined in the plan related to housing, talent attraction and retention, and



tourism. The Roundtable will also look to assess the effectiveness and applicability of these KPIs and determine if there are other metrics that should be used to measure progress towards goals.

Action Item #4: Align Economic Development Project Wins with the Allegany County Chamber's Outstanding Business Recognition Dinner

Allegany County DECD will align with the Allegany County Chamber's annual Outstanding Business Recognition Dinner to celebrate business attraction, expansion, and newly formed companies from the previous year through formal recognition of company investments. This event will demonstrate unity amongst partners, provide a venue to report on success, and to announce initiatives for the new year.

Across the US, many economic development organizations celebrate project wins from the previous year through a business recognition event. These events serve multiple purposes including cementing relationships with executives from the projects won; integrating regional leadership into economic development efforts; providing an opportunity to report out project success – including economic impact of the economic development efforts from the last year; and to provide earned media for the businesses, community, and economic development organization.



STRATEGY #1 IMPLEMENTATION PLAN

Reinforce and implement roles for economic development organizations along clear objectives and desired outcomes.

Key Performance Indicators (KPIs)	Initial KPI Targets
Positive prospect and/or site selector feedback	N/A
Streamlined process from the point of receiving an RFI to a project win (project life cycle)	N/A
Enhanced community support	N/A

Action Items:

1. Affirm the Main Point of Contact

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Maryland Department of Commerce; Cumberland Economic Development Corporation; City of Frostburg
- Timeline: 1 – 6 Months

Key Steps:

- a. Reach out to the Maryland Department of Commerce
- b. Issue a press release

2. Allegany County Economic Development Partners Roundtable

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Cumberland Economic Development Corporation; City of Frostburg
- Timeline: 1 – 6 months

Key Steps:

- a. Identify list of participants
- b. Set regular meeting schedule

3. Allegany County Economic Development Performance Metrics

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Cumberland Economic Development Corporation; City of Frostburg
- Timeline: 1 – 6 months

Key Steps:

- a. Work with Partners Roundtable to determine the top line metrics for economic development
- b. Identify method for collecting data and responsible parties
- c. Establish initial benchmarks, plan, and process for revising



4. Align Economic Development Project Wins with the Allegany County Chamber's Outstanding Business Recognition Dinner

- Responsible Organization: Allegany County DECD; Allegany County Chamber of Commerce
- Supporting Organizations: Cumberland Economic Development Corporation; City of Frostburg
- Timeline: 6 Months – 1 Year
- Potential Funding: Ticketed event to make the cost budget neutral

Key Steps:

- a. Prepare presentation at the annual dinner that announces and recognizes recent successes, provides a status update on elements of the Strategic Plan
- b. Invite businesses that have moved to or grown in the region in the last year



STRATEGY #2:

OUTLINE A CONCERTED BUSINESS ATTRACTION IMPLEMENTATION PLAN.

(This could include site selector engagement, industry shows, coordination with Maryland Office of Business Development).

BUSINESS ATTRACTION

Business Attraction is focused on recruiting new companies to a community. Like consumers, businesses have choice in who they procure products or services from, who they partner with, and where they operate. This free market model is a cornerstone of economic development, as it encourages healthy competition. Communities can leverage this competition to recruit businesses that provide quality jobs, increase capital investment, generate government revenue, diversify the industry base, and support philanthropic causes. Increasing the primary industry business base supports a community's overall sustainability and vibrancy.

Addresses Goal:



Business attraction comes in several forms. Some businesses choose to partially or completely relocate or consolidate to a new location. There are a variety of factors that may cause a business to consider relocation or consolidation. These include, but are not limited to, operational costs, workforce, customer proximity, transportation and logistics, and quality of life. Another form of business attraction may result in job retention, preventing the loss of operations and jobs at an existing location. As companies innovate, they may require new operational footprints to bring new products to market. The factors driving this innovation may include existing operational capacity restraints, proximity to key customers or markets, or business models that require a lower cost than existing operations within a company's footprint.

There are a variety of tools and strategies that are employed to successfully win business attraction projects. Many companies with a moderate-to-substantial attraction project hire a site selection consultant to guide the business through the process of eliminating geographies, and eventually specific sites, from consideration, to ultimately select a new site for operations. Site selection consultants use or acquire objective industry, workforce, socioeconomic, geographical, real estate, and operational cost data to help guide the process of elimination. The consultants and prospects often complement the objective data with qualitative discussions with business executives and other relevant leaders in the community.

Site selection consultants often work with their clients to negotiate incentives, financing, and workforce development training to maximize their project and leverage their up-front investment costs. Therefore, economic development organizations must have a robust program to adequately and efficiently engage site selectors and prospects – both in a proactive business development setting and reactively when responding to a Request for Information (RFI). Further, economic development organizations must have access to competitive incentives that are attractive to prospects but that ultimately provide a net benefit to the community. Allegany County has the benefit of various incentives including the County's Revolving Building Fund (RBF). The RBF obtains recurring rental revenue that can be used for economic development. An additional tool is the Western Maryland Revolving Loan Fund from the Tri-County Council for



Western Maryland which provides loans for gap financing for firms looking to locate, expand, or remain in the region. Finally, but not to be considered exhaustive, successful traditional public relations, media, and social media tools can evolve an image of a community over time. These strategies emphasize objective selling points such as a community's industry clusters or workforce strengths. Further, they can positively position subjective factors such as championing a downtown's vibrancy and culture. These strategies have great potential to control a community's narrative and support attraction efforts.

BUSINESS ATTRACTION IN ALLEGANY COUNTY

Allegheny County has a great opportunity to enhance Business Attraction programming and win new attraction projects through new or refreshed strategies. Business Attraction is important to the economic sustainability of Allegheny County as it expands economic opportunity and the tax base. The following Business Attraction strategies have been developed through the alignment of the strategic planning process inclusive of the Steering Committee, staff, and public input with the County's target industries, Allegheny County team expertise, state and regional resources, and national best practices.

Action Items

Action Item #1: Enhanced Alignment with State Economic Development Partners

As seen above, Allegheny County has a strong network and healthy relationships with regional, local, and state economic development partners. The Maryland Department of Commerce serves as a major partner and source for leads and RFIs. The Allegheny County DECD will continue to engage the Maryland Department of Commerce to position Allegheny County as competitive when responding to RFIs and competing for economic development projects.

The Allegheny County DECD Director and the Maryland Department of Commerce regional representative will establish a formal engagement strategy, primarily in the form of regular meetings. These meetings will focus on advancing organizational relationships and identifying Allegheny County's assets and liabilities that may affect the County's competitiveness when responding to RFIs. Where possible, the Allegheny County DECD will partner with the Maryland Department of Commerce on business development travel and site selector and industry engagements.

Action Item #2: Leverage Traditional and Social Media Marketing MARKETING FOR ECONOMIC DEVELOPMENT

Marketing is a complementary activity to Business Attraction. It is known that site selectors and prospects use objective data and systems in their process of elimination. However, decision making is never purely objective. Therefore, marketing has a strong role in assertively defining a geography, positioning its strengths, and helping overcome perceived or actual liabilities. Marketing should be driven by data but complemented by engagement, which builds ownership, value, and succinct and impactful messaging. The Allegheny County DECD can use marketing coupled with other Business Attraction efforts, to assert the County's opportunities for new businesses. Marketing also supports programmatic efforts in BRE, Workforce Development, Talent Retention and Attraction, and other opportunities. Further, it demonstrates the County's efforts, successes, and strategic initiatives.



ASSESS MARKETING TOOLS

It is prudent to seek continuous improvement in all matters of operations; but in the case of marketing trends and tools, adaptation is key. It is clear that modes of media can dramatically change as new technology and services compete with traditional sources. Social media channels see dramatic swings in users. The Allegany County DECD must be cognizant of various trends as the department employs marketing for programmatic efforts.

- The Allegany County DECD will inventory and assess all current marketing tools. The intent is to understand those that are effective and those that may be a distraction. The County will emphasize tools that work. In addition to social media platforms (Facebook, Twitter, etc.), the Allegany County DECD will evaluate traditional media outlets (print, TV, radio) as well as geofencing, which involves targeting specific geographic areas with internet and social media advertisements.
- The Allegany County DECD will explore new marketing methods or applications to advance the County's efforts. New methods may include speaking roles and trade shows as opportunities to engage new audiences and generate potential leads for economic development projects.

In cases where the given media platform makes it feasible to track hits and web traffic, the Allegany County DECD will use these to prioritize specific media platforms and marketing strategies to maximize their reach. For traditional media platforms and speaking roles the Allegany County DECD will assess the effectiveness of these methods based on the total number of follow-ups or connections generated.

STRATEGICALLY ALIGN PRESS RELEASES

The Allegany County Economic Development Department may have multiple simultaneous public announcements to be made as the County wins projects, enhances its BRE effort, and completes other items in this Strategic Plan. From affirming the Allegany County DECD Director's lead role in primary industry economic development to the announcement of this plan, the Allegany County DECD has a lot of great things to share with the local, regional, state, national, and global community. Therefore, the County has a great opportunity to carefully coordinate emerging announcements.

- The Allegany County DECD will inventory upcoming announcements, note appropriate timing for public consumption, and potentially submit a consolidated press release.
- The Allegany County DECD will explore the opportunity to contract with a professional public relations firm to guide the County on timing and alignment of the upcoming announcements.

Action Item #3: Establish a Formal Business Development Travel Schedule

The Allegany County DECD, led by the Director, will conduct business development on behalf of the County for all outbound and in-bound opportunities. These will include, but will not be limited to, site selector forums, industry trade shows, and prospect visits. This change will help to support Strategy #1: Action Item #1 - Affirm the Main Point of Contact ensuring that the DECD is seen as the lead economic development organization in front of site selectors, prospects, and economic development partners.



The Allegany County DECD will mostly align with the Maryland Department of Commerce on coordinated outbound site selector forum and industry show travel. However, there may be unique and select occasions where the County desires to attend forums outside of Maryland Department of Commerce's business development plans. The Allegany County DECD Director may attend these forums alone or coordinate with other regional economic development partners.

FORUMS AND CONFERENCES

The following table demonstrates a recommended list of economic development, site selector, industry, or innovation forums and conferences. The list has been developed in relation to the County's target industries, strategic planning, and other relevant variables that direct business development opportunities for the Allegany County DECD. It is understood that the Department's marketing budget may not be able to accommodate all forum and conference opportunities.



2019 Economic Development, Site Selector, Industry, & Innovation Conferences to Attend

Organization	Conference	Location	Dates	Registration ¹	Rationale	Priority
Maryland Economic Development Association (MEDA)	2019 MEDA Annual Conference	Cambridge, MD	April 28 - April 30, 2019	Member (\$445), Non-Member (\$620)	An engaging examination of the role economic development plays in creating comprehensive and equitable opportunity for increasingly diverse communities.	High
Industrial Asset Management Council (IAMC)	Spring 2019 IAMC Professional Forum	Santa Barbara, CA	May 4-8, 2019	\$2,145	A leading conference on manufacturing real estate investment. Opportunity to market Allegany County in front of real estate executives.	Medium
Area Development	Consultants Forum 27	Charlotte, NC	June 3-5, 2019	\$1,795	Area Development organizes the Consultants Forums to connect Site Selection Consultants with Economic Developers.	High
Southern Economic Development Council (SEDC)	SEDC Annual Conference. Brave. New. World. SEDC 2019	New Orleans, LA	July 31, 2019	Approx. \$750	The SEDC Annual Conference provides Allegany County great access to site selection consultant and emerging trends in economic development.	High
Site Selectors Guild	2019 Fall Forum	Dallas, TX	September 9-11, 2019	Approx. \$2,000	The SSG Fall Forum is attended by the world's top site selectors. Allegany County can directly engage these consultants.	High
Urban Land Institute (ULI)	2019 ULI Fall Meeting	Washington, D.C.	September 18-21, 2019	Approx. \$2,495	Allegany County will engage more than 3K leaders from every sector of the real estate industry.	Medium
International Economic Development Council (IEDC)	2019 Annual Conference	Indianapolis, IN	October 13-16, 2019	\$775 (IEDC Member and registration by August 9)	The leading international economic development conference hosts leading site selectors & demonstrates industry trends.	High
Society of Industrial and Office Realtors (SIOR)	2019 Fall World Conference	Portland, OR	October 17-19, 2019	Approx. \$1,210	Worldwide conference attended by corporate real estate brokers. Opportunity to market Allegany County & specific sites.	High
State Science & Technology Institute (SSTI)	2019 SSTI Annual Conference	TBD	TBD, likely December, 2019	Approx. \$775	Engage leaders in the innovation economy to understand trends.	Low

¹Registration price is assuming one registration

STRATEGY #2 IMPLEMENTATION PLAN

Outline a concerted Business Attraction implementation plan.

Key Performance Indicators (KPIs)	Initial KPI Targets
Project wins	1-2 Projects per year
Jobs created	25-50 Jobs per year
Average wage of new jobs created	\$45,000 - \$50,000
Capital investment	\$500,000 per year

Action Items:

1. Enhanced Alignment with State Economic Development Partners

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Maryland Department of Commerce; Cumberland Economic Development Corporation; City of Frostburg
- Timeline: 1 – 6 Months

Key Steps:

- a. Establish regular meeting schedule with Maryland Department of Commerce regional representative
- b. Identify key Allegany County assets to promote for Business Attraction efforts.

2. Leverage Traditional and Social Media Marketing

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Cumberland Economic Development Corporation; City of Frostburg
- Timeline: 6 Months – 1 Year
- Potential Funding Sources: DECD; US Economic Development Administration Grants; Appalachian Regional Commission

Key Steps:

- a. Inventory and assess the County’s current marketing tools as well as new tools, cataloguing cost and features to determine if changes are needed
- b. Explore potential speaking opportunities, trade shows, or other ways to connect with broader audiences
- c. Issue press releases to promote project wins, increased BRE efforts, and successful implementation of elements of the Strategic Plan

3. Establish a Formal Business Development Travel Schedule

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Cumberland Economic Development Corporation; City of Frostburg



- Timeline: 1 – 2 Years
- Potential Funding Sources: County; Maryland Department of Commerce

Key Steps:

- a. Evaluate existing business development travel schedule and costs
- b. Identify gaps where additional travel could have an impact based on available funding and capacity
- c. Track effectiveness of travel by monitoring leads generated compared to total cost
- d. Coordinate with the Maryland Department of Commerce on outbound site selector forum and industry show travel



STRATEGY #3:

DEVELOP A FORMAL BUSINESS RETENTION & EXPANSION (BRE) PROGRAM

BUSINESS RETENTION & EXPANSION

As a critical component to any community's toolbox of economic development services, a BRE program provides assistance to companies to facilitate growth and expansion leading to new jobs and capital investment. Further, a BRE program prevents companies from relocating or closing. The primary objective of a BRE program is to identify and address the needs of businesses and is accomplished through sustained relationships and data collection. These ongoing efforts allow the Allegany County DECD and other regional partners to better align policies, investments, and economic development efforts. By maintaining ongoing relationships, the Allegany County DECD will be well-positioned to understand and track the evolving needs of the business community. Through engagement with businesses Allegany County DECD can utilize surveys to periodically evaluate key needs across many businesses. The Allegany County DECD will use the KPIs included in this strategy as a baseline for success in anticipating needs of the business community. Through engagements and information gathered during survey collection additional KPIs may be developed or refined to proactively respond to the needs of the Allegany County business community.

Addresses Goal:



There are a variety of ways to evolve and implement a BRE program. The Allegany County DECD will formally develop a multifaceted program that gathers crucial intelligence, offers technical assistance, and helps a variety of primary industry businesses to grow. Fundamentally, the Allegany County DECD's BRE program should position the County to be seen as a direct resource provider. This includes providing technical assistance, brokering of assistance resources such as access to capital, and advocacy in the business community around business climate and associated policies and procedures at the local, county, and state level.

The Allegany County DECD BRE Program will include the following elements:

- A comprehensive list of existing Allegany County businesses;
- BRE program infrastructure;
- Survey instrument to regularly collect, analyze, and track data on both the company and industry trends; and
- BRE database to house and analyze data and provide consultation to partners. This will be included in the new Allegany County CRM.

BRE IN ALLEGANY COUNTY

The Allegany County Economic Development Department has a great opportunity to expand relationships with existing businesses. The development of a formal BRE program will further demonstrate the County's commitment to existing businesses, demonstrate the Allegany County Economic Development Department's value to area businesses and prospects. In addition, a formal BRE program will provide concerted organizational direction for the program and organize data to help guide local and regional policy and service delivery enhancements.



Action Items

Action Item #1: Develop or Enhance a Formal List of Existing Primary Industry Businesses

When developing a BRE program it is vital to understand the portfolio of existing businesses in a community. It is logical to know the businesses that need to be engaged and to build a program around these clients. The Allegany County DECD will research, analyze, scrub, and develop a formal and comprehensive list of existing primary industry businesses in Allegany County. This list will include the confirmed identification of existing businesses with their formal and known name, baseline contact information, and business data.

Action Item #2: Develop a Formal BRE Program Infrastructure

A BRE program should have a formal and organized programmatic structure. BRE is a deliberate and long-term process of relationship building and data collection. As sensitive and private business information is often shared, and there are broader variables at play, Standard Operating Procedures (SOPs) become an important tool to guide the interactions. Furthermore, a major benefit of BRE is the ability to collect business data and produce aggregate reports. SOPs and a formal program infrastructure will ensure that data is collected consistently and fully utilized.

The Allegany County DECD will develop an optimal structural composition for a successful BRE program. This development will include standard operating procedures (SOPs), the development of a list of existing primary industry businesses, a rotational BRE visitation or outreach schedule, clearly identified and aligned BRE partners, accountability and evaluation metrics, and other key information.

Action Item #3: Develop a BRE Survey

Once the program structure, roles, and responsibilities have been established, the Allegany County DECD will develop a business survey instrument that best fits the County's needs. Fundamentally, there are four ways to conduct a business survey:

- By mail;
- In-person interview;
- Combined mail and in-person interview; or
- By E-mail or web-based platform.

Each type of survey delivery has its benefits depending on the strategic BRE objective, and it is important to choose the model that best matches the resources—both financial and human—available. However, an in-person interview is recommended to establish or expand the relationships between business leaders and the Allegany County DECD.

The Allegany County DECD will design a survey questionnaire, focusing on topics such as:

- Basic firm contact information and background;
- Business climate;
- Labor and training needs;
- Marketing and trade;
- Financing needs;
- Regulatory issues;
- Barriers to growth and expansion plans;



- Satisfaction with public services and utilities; and
- Past utilization and satisfaction of local assistance.

The Allegany County DECD will design and integrate the BRE Survey into a process to consistently collect and analyze data. Based on the prioritization of businesses outlined in Action Item #4, the survey will be distributed via mail or email every one to two years to larger firms that are not selected for BRE visits. Small firms can be surveyed every two to three years if not selected for BRE visits based on other key characteristics.

Action Item #4: Prioritize BRE Visits

It is important to conduct BRE visits and service with every primary industry business in Allegany County. However, strategic implementation of a BRE program will require that the County's largest, fastest growing, and most at-risk employers are prioritized in the BRE rotation.

The Allegany County Economic Development Department will utilize the portfolio of existing primary industry employers in the County to identify, prioritize, and increase the frequency of visits with Allegany County's employers.

Partnering with the cities of Cumberland and Frostburg, Allegany County should create a series of indicators designed to determine when/how the County should be involved in BRE visits. Potential indicators could include:

- Employment size and growth;
- Revenue size;
- Industry;
- Innovative technology development; and
- A need to establish local connections.

The below table shows the estimated number of companies by size in Cumberland, Frostburg, and other areas of the County.¹ Based on the distribution of employers, Allegany County should prioritize and lead visits to the approximately 18 private industry employers with 26 or more employees outside of Cumberland and Frostburg. The County should also participate in meetings with staff from the City of Frostburg or the Cumberland Economic Development Corporation (CEDC) with the 35 businesses with 51 or more employees within those cities when staff resources allow.

Primary Industry Businesses in Allegany County by Location and Size

	Zero Employees (Self-Proprietors)	1-5 Employees	6-10 Employees	11-25 Employees	26-50 Employees	51 to 100 Employees	More than 100 Employees
Other Areas of the County	20	42	59	33	12	4	2
Cumberland	75	233	256	178	64	19	10
Frostburg	26	58	42	30	13	3	3
Total	121	333	357	241	89	26	15

¹ Source: Database USA. Accessed 3/28/2019.



The City of Frostburg, CEDC, and the County should design alternative prioritization mechanisms to identify businesses in their geographic areas with 25 or fewer employees that should be prioritized based on other indicators highlighted above. Tentatively, the County should look to participate in around five to ten meetings with smaller firms each year. The process by which the County and its partners identify and collaborate on the appropriate businesses to connect with will evolve as additional information on each company is gathered through these meetings. Establishing an initial process will help launch the effort, but refinement and review will be needed.

Action Item #5: Adopt a Customer Relationship Management (“CRM”) Platform.

As the BRE Survey is designed to obtain business data to be used to respond to retention threats, expansion opportunities, and to advise policy, there is a need to store, organize, and analyze the data with the use of a BRE Database or through the use of a CRM.

The Allegany County DECD will integrate a BRE Database into a new CRM. A CRM is an appropriate tool to manage confidential business client information, partner relationships, and other data for small, medium, and large organizations. For Allegany County DECD, the office will benefit from many features including the ability to integrate the BRE survey into the CRM. The benefit includes the ability to draw down aggregate data for ongoing planning and interaction with regional partners.

If possible, allowing for shared licenses with partners, including the City of Frostburg and the CEDC would allow for easy distribution of data between the groups, and software with firewalls that can keep prevent certain information from being shared with certain users, allowing for data privacy when needed. Additional features could allow for tracking business attraction projects in addition to BRE efforts, including potential leads and prospects. This would the County to analyze trends and easily calculate metrics and KPIs for both business attraction and BRE efforts. Customizing a platform for Allegany County’s needs would allow for the easiest and most efficient use; however, customization may result in increased implementation costs. Third-party providers are often able to aid in the implementation and customization of the software at a cost. These providers could also provide technical advice on the platform most suited to Allegany County’s needs.

If Allegany County is not yet able to accommodate a CRM, the Allegany County DECD should develop a BRE Database using spreadsheet software such as Microsoft Excel.

Action Item #6: Market the BRE Program

A BRE program offers tremendous value to existing primary industry businesses and the community. It is often the case that communities with a BRE program do not communicate that the program exists and fully advertise its value. This missed opportunity makes it harder to secure BRE visits and threatens the County’s ability to demonstrate the value to the community.

Successfully marketing the BRE program to existing primary industry businesses will communicate the Allegany County DECD’s intent when they request meetings and emphasize the County’s commitment to primary industry businesses. The County should convey not only the purpose of the meetings from the County’s perspective but also the benefits to companies,



including workforce and talent recruitment support; business expansion support; aid in navigating County services; and building closer connections to the community.

The Allegany County DECD will integrate news about an enhanced BRE program into more comprehensive press releases in coordination with other major announcements.



STRATEGY #3 IMPLEMENTATION PLAN

Develop a formal Business Retention & Expansion (BRE) Program.

Key Performance Indicators (KPIs)	Initial KPI Targets
BRE visits	50-75 Visits per year
Project wins	3-5 Projects per year
Jobs created	15-20 Jobs per year
Jobs retained	15-20 Jobs per year
Average wage of new and retained jobs	\$45,000-\$50,000
Capital investment	\$500,000 per year

Action Items:

1. Develop or Enhance a Formal List of Existing Primary Industry Businesses

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Cumberland Economic Development Corporation; City of Frostburg
- Timeline: 1 – 6 Months
- Potential Funding Sources: County

Key Steps:

- a. Assess any existing business lists for missing companies or information
- b. Gather contact information for businesses

2. Develop a Formal BRE Program Infrastructure

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Cumberland Economic Development Corporation; City of Frostburg
- Timeline: 1 – 6 Months
- Potential Funding Sources: County

Key Steps:

- a. Work with Economic Development Partners Roundtable to establish Standard Operating Procedures (SOP)
- b. Outline partner responsibilities, process for scheduling visits, and data collection methods and storage
- c. Add to and update SOP document as remaining action items for this strategy take place

3. Develop a BRE Survey

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Cumberland Economic Development Corporation; City of Frostburg



- Timeline: 6 Months – 1 Year
- Potential Funding Sources: County

Key Steps:

- Design survey questions based on topics most relevant to the County (see page 56 for example topics)
- Identify methods for delivering survey and format/question changes based on delivery method
- Determine process for cataloguing, collecting, and analyzing data between partners
- Integrate process into BRE SOPs

4. Prioritize BRE Visits

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Cumberland Economic Development Corporation; City of Frostburg
- Timeline: 6 Months – 1 Year
- Potential Funding Sources: County

Key Steps:

- Determine relevant indicators for prioritizing visits (see page 56 for example indicators)
- Catalogue businesses based on indicators as high, medium, and low priority
- Establish the following initial goals (refined as needed based on company list)
 - County meets with 15-20 large firms outside of Cumberland and Frostburg
 - County and appropriate partner staff meet with 30-40 large firms in Cumberland and Frostburg
 - County and appropriate partner staff meet with 5-10 smaller firms in each of the County, Cumberland, and Frostburg

5. Adopt a Customer Relationship Management (“CRM”) Platform.

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Cumberland Economic Development Corporation; City of Frostburg
- Timeline: 1 – 2 Years
- Potential Funding Sources: County; US Economic Development Administration Grants

Key Steps:

- Develop an intermediary system for collecting information in Excel
- Conduct an inventory of available CRM systems and potential vendors
- Establish key preferred/required features
- Evaluate costs and available funding
- Identify preferred system/vendor and implement system



6. Market the BRE Program

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Cumberland Economic Development Corporation; City of Frostburg; Allegany County Chamber of Commerce
- Timeline: 1 – 2 Years
- Potential Funding Sources: County; Allegany County Chamber of Commerce

Key Steps:

- a. Include information regarding the BRE program in relevant press releases
- b. Work with the Allegany County Chamber of Commerce to include information in relevant newsletters/communications
- c. Post information about the program on Allegany County DECD website and other relevant sites
- d. Encourage businesses to share positive information with other local businesses



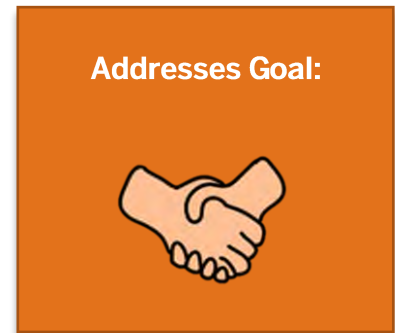
STRATEGY #4:

COLLABORATE WITH PRIVATE SECTOR LEADERSHIP TO ESTABLISH COMMITTEES TO ADVANCE THE COUNTY'S ECONOMIC DEVELOPMENT EFFORTS

Two key committees would initially be established:

- Attraction, Expansion, & Entrepreneurship Committee
- Tourism Committee

Economic development is successful when supported by the community's private sector leadership. Private sector leaders can guide economic development practitioners on what is important from a private sector perspective, participate in prospect visits or business development, and invest their thought leadership and even capital into economic development efforts. Allegany County has an opportunity to expand the private sector's involvement in the County's economic development efforts. The following action items identify the first steps the Allegany County DECD will take to strengthen private sector participation for the ultimate benefit of the County's economic development success.



Action Items

Action Item #1: Identify Private Sector Leaders to Engage in Economic Development Efforts

To enhance private sector leadership involvement, the County will identify leaders to engage and implement individual outreach to gauge interest and capacity to better use the leaders' skillsets and network to advance economic development in Allegany County. In order to ensure diverse representation, private sector engagement should include leaders from a mix of:

- Industries, including industrial and office uses;
- Company size, including employment and revenue;
- Demographics, including age, gender, and race/ethnicity;
- Geographic locations within the County; and
- Company headquarter locations; and
- Connections to the community, i.e. including leaders who grew up in Allegany County and have deep connections and those who may have moved to the County from other locations.

While it may not be possible to include all of these factors when considering potential leaders to engage, the more diverse group involved the more likely new and innovative ideas will be encouraged amongst the committee members.

Action Item #2: Establish Economic Development Committees

The County will enhance private sector leadership and participation in the County's economic development efforts through the development of committees relevant to economic



development. The leaders identified in Action Item #1 will be nominated to serve on committees based on their background, qualifications, and interest. These committees will include:

- Attraction, Expansion, & Entrepreneurship, and
- Tourism Committee

The Allegany County DECD will establish concise SOPs, organize quarterly agendas and logistics, and facilitate meaningful discussions with the committees focused on sharing progress, aggregate data, activities, and engaging private sector perspectives to advance the committees' and DECD's goals. These committees may set the foundation for a future Allegany County Economic Development Foundation to obtain, manage, and dispose of private funds for the benefit of the County's economic development success. Beginning with two broadly focused committees will enable Allegany County to determine where additional attention is required in terms of industry and tourism to further target efforts to enhance thought leadership and private-sector support of economic development within the County. These committees may result in the formation of additional committees that are either industry focused or issue focused.



STRATEGY #4 IMPLEMENTATION PLAN

Collaborate with private sector leadership to establish committees to advance the County's economic development efforts.

Key Performance Indicators (KPIs)	Initial KPI Targets
Increased private sector participation in County economic development efforts	Engage 5 New Firms for Committee Participation
Attendance at committee meetings	75% Attendance Rate at Each Meeting

Action Items:

1. Identify Private Sector Leaders to Engage in Economic Development Efforts

- Responsible Organization: Allegany County DECD; Allegany County Chamber of Commerce; Cumberland Economic Development Corporation
- Supporting Organizations: City of Frostburg; Allegany County Chamber of Commerce
- Timeline: 1 – 6 Months

Key Steps:

- a. Develop list of private sector leaders already engaged in economic development efforts to offer support
- b. Determine what industry sectors or business types are not currently represented in private sector leadership
- c. Utilize resources such as the business list and the Allegany County Chamber of Commerce to engage additional private sector leaders via one-on-one meetings or presentations on the overall economic development strategic planning effort

2. Establish Economic Development Committees

- Responsible Organization: Allegany County DECD; Allegany County Chamber of Commerce; Cumberland Economic Development Corporation
- Supporting Organizations: City of Frostburg; Allegany County Tourism
- Timeline: 6 Months – 1 Year

Key Steps:

- a. Identify preliminary list of committee members
- b. Develop agenda, priorities, and goals for each committee
- c. Establish meeting schedule



STRATEGY #5:

ENGAGE HOUSING DEVELOPERS AND FINANCIERS FROM EXTERNAL MARKETS SUCH AS BALTIMORE, WASHINGTON DC, AND PITTSBURGH TO PROVIDE LOCALIZED MODELS FOR FUNDING NEW AND REDEVELOPED HOUSING.

Allegany County has an old housing stock with 33% of homes being built before 1940. Additionally, construction of new homes is lagging, with fewer than 300 homes constructed since 2010. Market rate housing development in Allegany County is currently cost-prohibitive for most developers given average home values and construction costs. In addition to greenfield sites, Allegany County may look to identify areas with vacant and blighted housing to be replaced with new housing suited to the current and future needs of Allegany residents. Public perception indicates a need for new housing aimed at young professionals and an aging population. Attracting external housing developers through local incentives may help bridge the financial gap that currently exists for local developers. Current examples of new housing developments that may be used as successful stories to spur additional development include the Footer Dye mixed-use housing development near the waterfront and the in-progress Rolling Mill project. Other sites might consider future employer needs in areas of high employment concentration such as the Barton Business Park. The Cumberland Chase development project located adjacent to the Barton Business Park is one such growth area that the County should continue to pursue.



The Cumberland Economic Development Corporation (CEDC) is currently looking to release a Request for Proposals for an in-depth Housing Study for the City of Cumberland. This study will look to accomplish some of the action items listed below, in particular Action Items #1 and #2. This study will look at the geographic area of the City of Cumberland. While this limited focus does not incorporate the totality of Allegany County, it may act as a launching pad for efforts to catalog, restore, and redevelop the most serious blighted properties within the County, many of which are concentrated in Cumberland. The successful completion of this study and its resulting findings may impact the implementation of the remaining action items in this strategy. Therefore, the County and its local partners should look to reevaluate and reassess this implementation plan if needed based on the outcomes of that project. This project could act as a pilot program for this effort, creating a model that could be scaled up to include other areas of the County upon successful completion.

Action Items

Action Item #1: Survey and Prioritize Housing Needs to Identify Prospective Developers

Survey and analyze housing needs for key groups of residents to identify potential developers capable of constructing specific housing types tailored to Allegany County. Focus in particular on the aging population and the young professional class that may desire low-maintenance,



walkable homes with nearby amenities. This analysis can leverage the existing housing analysis completed as part of the plan to begin to identify developers that might be interested in building the needed housing types.

Action Item #2: Inventory Potential Development Sites

Identify additional potential sites throughout County to raze vacant, blighted, or underutilized properties similar to the Frostburg Center Street Project. Explore opportunities to leverage municipal and County level involvement in achieving development ready sites attractive to outside developers and suitable for additional housing development. County level support may include provision of land or financial incentives that mitigate site acquisition and construction costs for developers.

Action Item #3: Target and Engage with Potential Housing Developers

Develop a list of potential developers servicing the mid-Atlantic region or looking to expand into Western Maryland. Establish direct contact with those developers to market development opportunities. Prepare marketing materials that include available sites for housing development. Include an inventory of potential tax abatement and incentive programs offered federally, by the State of Maryland, and through Allegany County. This should include the four Qualified Opportunity Zones in Allegany County that encompass parts of downtown Cumberland and Frostburg. Information on potential developers to target can be found through the Maryland Building Industry Association.²

Action Item #4: Establish a Public-Private Partnership

Identify an appropriate private-public partnership model that will facilitate the development and expansion of current housing options in Allegany County by selectively engaging potential developers and public incentives to mitigate the current prohibitive construction costs of housing development in Allegany County. This action item should take place following initial engagement with developers that establishes the need for a public-private partnership and identifies the right partners.

² Maryland Building Industry Association, <https://www.marylandbuilders.org/>



STRATEGY #5 IMPLEMENTATION PLAN

Engage housing developers and financiers from external markets such as Baltimore, Washington DC, and Pittsburgh to provide localized models for funding new and redeveloped housing.

Key Performance Indicators (KPIs)	Initial KPI Targets
Number of inquiries or engagements with housing developers not currently operating or based in Allegany County	5 -10 Inquiries over 2-3 years
Successful maintenance of up-to-date inventory of potential housing projects for development and redevelopment	N/A
Instances of sharing marketing materials with external developers	10-15 Instances over 2-3 years
Total number of new housing projects completed in Allegany County	2-3 Projects over 5 years

Action Item:

1. Survey and prioritize housing needs to identify prospective developers

- Responsible Organization: Cumberland Economic Development Corporation
- Supporting Organizations: Allegany County DECD; City of Cumberland; City of Frostburg
- Timeline: 6 Months – 1 Year
- Funding Sources: Maryland Department of Housing and Community Development (DHCD); US Department of Housing and Urban Development (HUD) Grants

Key Steps:

- a. Develop scope of work and issue Request for Proposals from potential consultants for in-depth housing analysis
- b. Issue RFP and identify consultant
- c. Complete analysis
- d. Identify developers that might be interested in building the needed housing types
- e. Determine additional data or analysis needed (potentially to expand geographical scope)

2. Inventory potential development sites

- Responsible Organization: Cumberland Economic Development Corporation
- Supporting Organizations: Allegany County DECD; City of Cumberland; City of Frostburg
- Timeline: 1 – 2 Years
- Funding Sources: Maryland DHCD; US HUD



Key Steps:

- a. Identify key sites for development or redevelopment
- b. Develop concept plans for key sites
- c. Explore municipal and County level incentives and support for potential projects
- d. Complete project sheets/Request for Proposals for sites

3. Target and Engage with Potential Developers

- Responsible Organization: Allegany County DECD
- Supporting Organizations: City of Cumberland; City of Frostburg; Cumberland Economic Development Corporation
- Timeline: 2 – 3 Years
- Funding Sources: Maryland DHCD; US HUD

Key Steps:

- a. Develop a list of potential developers
- b. Establish direct contact with developers to market development opportunities
- c. Prepare marketing materials, including available sites, project sheets/RFPs
- d. Inventory of potential tax abatement and incentive programs offered federally, by the State of Maryland, and through Allegany County
- e. Include Opportunity Zones in Allegany County

4. Establish a Public Private Partnership

- Responsible Organization: Allegany County DECD
- Supporting Organizations: City of Cumberland; City of Frostburg; Cumberland Economic Development Corporation
- Timeline: 3 – 5 Years
- Funding Sources: Maryland DHCD; US HUD

Key Steps:

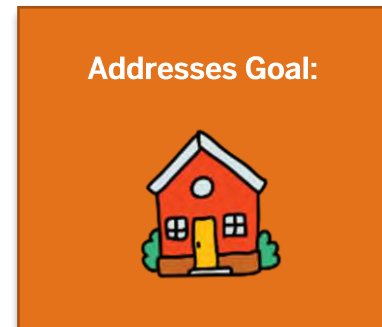
- a. Evaluate the need for a public-private partnership for potential projects based on potential funding gaps and gauging developer interest
- b. Identify an appropriate partnership model based on project type/feasibility and the needed funds to make the project feasible



STRATEGY #6:

DEVELOP AN OWNER-OCCUPIED HOME IMPROVEMENT ASSISTANCE PROGRAM TO ENCOURAGE RENOVATIONS OF EXISTING HOUSING.

Deferred maintenance of housing is major challenge in Allegany County. It impacts the overall image of the County and existing home values and hinders the ability of homeowners to relocate out of poor-quality housing. Allegany County should explore and establish financial assistance programs to homeowners for necessary maintenance and upgrades to existing homes. Public engagement sessions highlighted issues with home maintenance and underwater mortgages. Residents and business representatives also raised housing scarcity as a challenge to attracting new residents to Allegany County. Some sources suggest that blight can increase overall vacancy and indirectly effect market rates of for sale homes.³



Action Items

Action Item #1: Identify Funds for Owner-Occupied Home Improvements

Establish source of public funds used to assist homeowners in need of small grants to renovate existing homes that are in need of maintenance. Include funding scan of additional private, state, and federal sources to support publicly managed funds. Below are potential funding sources and programs.

Maryland Department of Housing and Community Development (Maryland DHCD)

The Maryland DHCD offers several loan and grant programs for home repairs, including:

- [Maryland Housing Rehabilitation Program](#) and the [Special Targeted Applicant Rehabilitation Program](#), which finance loans for home improvements designed to bring homes up to applicable building codes.
- [Indoor Plumbing Program](#), which provides loans for indoor plumbing.
- [Accessible Homes for Seniors](#), which offers deferred loans or grants for improvements to homes to make them more accessible for seniors.
- [Lead Hazard Reduction Grant and Loan Program](#), which provides funding for homeowners to reduce or eliminate lead-based paint hazards in homes.
- [EmPOWER Maryland Low Income Energy Efficiency Program](#) and the [Weatherization Assistance Program](#), which provide funds for low-income households to install materials and equipment that can reduce energy use throughout the home.

³ <https://steelriverscog.org/the-cost-of-blight/> and <http://www.govtech.com/data/Data-Helps-Calculate-the-True-Costs-of-Blight.html>



U.S. Department of Agriculture

The USDA offers the following programs:

- [Single Family Housing Repair Loans & Grants](#), which provides loans to very-low-income homeowners to repair, improve or modernize their homes. The program also offers grants to elderly very-low-income households to remove health and safety hazards. (This program would only be available to homeowners outside of the City of Cumberland.)
- [Housing Preservation Grants](#), which offers grants to local governmental entities to provide grants or loans to low-income households to repair or rehabilitate housing. (Note: this program would only be available to homeowners outside of the City of Cumberland.)

Allegany County Human Resources Development Commission (HRDC)

The Allegany County HRDC offers the following programs:

- [Weatherization Program](#), which provides low-income households with funds for reducing energy use, including attic, floor, and wall installation, weathering stripping and caulking, hot water heater jackets, furnace cleaning and maintenance, window and door repair, and attic venting replacement.
- [Rehab/Housing Program](#), which focuses on low-income neighborhoods within the City of Cumberland. The HRDC purchases, rehabs, renovates, and sells the homes to qualified low to moderate income households.

Action Item #2: Design Program Guidelines to Prioritize Use of Funds

Design a budget neutral program that will assist homeowners and combat blight. Include plans to sustain program in the long run based on Allegany County capital and staff resources. Develop criteria to prioritize homeowners, to determine eligibility for funds, and eligible uses of funds.

Some program guidelines may be determined by the source of funds. However, potential priorities for repairs could include:

- Safety and hazard risks, including electrical systems and plumbing repairs
- Energy efficiency improvements, including roofing, heating, and insulation; and
- Disability accommodations

Other home repairs that may not be prioritized due to immediate need but can improve the overall value of homes include door, windows, and siding replacement. These improvements may also improve energy efficiency, reducing utility costs and creating savings for homeowners.

Program guidelines should also include income requirements. Many funding sources may already offer income thresholds. Allegany County should look to prioritize funds for the low-income and potentially elderly homeowners that are not capable of funding or completing the repairs themselves. Funds should be spent where the investment will maximize the return, and homes that have deteriorated beyond the ability to fix minor problems should not receive funding.



STRATEGY #6 IMPLEMENTATION PLAN

Develop an owner-occupied home improvement assistance program to encourage renovations of existing housing.

Key Performance Indicators (KPIs)	Initial KPI Targets
Total number of applications submitted and processed for home improvement assistance.	8-10 Applications over 2-3 years
Total dollar amount of successfully disbursed funds and number of individual households assisted.	\$160,000-200,000/4-5 households over 2-3 years
Dollar amount of external funding secured.	\$200,000 over 2-3 years

Action Items:

1. Identify Funds for Owner-Occupied Home Improvements

- Responsible Organization: Allegany County DECD
- Supporting Organizations: City of Cumberland; City of Frostburg; Cumberland Economic Development Corporation
- Timeline: 1 – 2 Years
- Funding Sources: Maryland DHCD; US Department of Agriculture (USDA)

Key Steps:

- a. Establish source of public funds already available
- b. Complete funding scan for additional private, state, and federal sources

2. Design Program Guidelines to Prioritize Use of Funds

- Responsible Organization: Allegany County DECD
- Supporting Organizations: City of Cumberland; City of Frostburg; Cumberland Economic Development Corporation
- Timeline: 1 – 2 Years
- Funding Sources: Maryland DHCD; USDA

Key Steps:

- a. Identify any guidelines/requirements based on source(s) of available funds
- b. Determine additional requirements that will ensure the highest impact and best use of funds
- c. Develop program guidelines



STRATEGY #7:**DEVELOP A TALENT RETENTION STRATEGY AIMED AT LOCAL HIGH SCHOOL, COMMUNITY COLLEGE, AND UNIVERSITY STUDENTS.**

Allegany County's educational institutions are key resources for the County, working to train current residents for jobs with the County's existing employers. However, increased efforts should be made to retain these talented workers within the County, supporting existing employers, and spurring continued economic growth. Workforce is a growing issue for small and mid-sized communities across the United States, as highly skilled workers follow jobs and businesses to major cities. Allegany County has two cities that offer urban living options in close proximity to an abundance of natural assets. This unique development landscape can be attractive to a demographic that desires a small-town lifestyle with access to outdoor recreational activities. The County should focus on retaining a younger workforce in the region by promoting this lifestyle to existing residents and/or students in the County.

Addresses Goal:

By focusing on those with existing local connections to the community, the County can encourage talent retention and upskilling of the existing workforce. Connecting local graduates at the high school, community college, and university level with jobs and career pathways to further talent development will help strengthen the workforce in Allegany County making it more attractive to future employers and growing the economy overall.

Action Items**Action Item #1: Inventory Skills Needs through Contact with Local Employers**

Leverage business retention and expansion meetings and responses from the BRE surveys with existing employers to gather data on the talent and skills needs of businesses in the region. Designate Allegany County's Workforce Development Specialist to share information gathered with leadership at Allegany Public Schools, Frostburg State University, and the Allegany College of Maryland.

The County likely already has an idea of existing skills needs and has created informal inventories of the most highly in-demand occupations. Building upon already available data to create a formal process for cataloging this information by leveraging the DECD's BRE efforts will help ensure that no employer is left out of the process and that businesses have a mechanism for being connected with Allegany County Public Schools, Allegany College of Maryland or Frostburg State University to share potential ideas for programs that will help prepare students for local career pathways.

Action Item #2: Connect Local High School Students to Career Pathways

Build upon current efforts to connect local high school students with continuing career paths in the region and job opportunities at local employers. There are already programs in the County looking to make these connections. Leadership Allegany! Rising offers high school juniors sessions on a variety of topics including Healthcare/Social Services, Government, Economic



Development/Business/Career, and Higher education. The Allegany County Pathways in Technology Early College (P-Tech) Program offers ninth grade students at Allegany County Public Schools the opportunity to begin an accelerated degree path towards an Associate degree in Computer Technology with a Cybersecurity option and extended opportunities for a bachelor's degree program at Frostburg State University. Additionally, the County and Allegany County Public Schools are partnering to launch a Youth Apprenticeship Program starting in Fall 2019 that will look to connect high school juniors and seniors with internships at local employers. County educators should continue to offer programs like this and expand to other fields that are unique to Allegany County, including healthcare and others identified through Action Item #1.

The Allegany County Workforce Development Specialist can act as the liaison between the DECD, local employers and the region's educational institutions to ensure that skills needs are being actively communicated. Connecting local businesses with the Workforce Development Specialist and actively marketing the services that the position can provide to employers will improve the overall impact.

Action Item #3: Survey Graduating Seniors

Survey seniors graduating from Allegany College of Maryland and Frostburg State University to understand ways to encourage graduates to stay in Allegany County. Use that communication to provide graduates with resources for finding local employment and housing.

A survey will allow leadership in Allegany County to estimate the actual retention rate of local graduates, developing a current benchmark and an indicator for future success. This will also provide information on where graduates are going, their reasons for relocating, and an opportunity to establish a connection point moving forward in order to potentially attract graduates back to the community in the future.

Example Survey Questions:

- 1) In what field did you earn your degree(s)?
- 2) Where are you planning to live following graduation?
- 3) What factors affected your decision to live in your chosen location:
 - a. Job Offer
 - b. Potential Job Availability
 - c. Housing Availability
 - d. Availability of Amenities
 - e. Close to Family
 - f. Spouse or Significant Other Job Location
 - g. Other: Please explain
- 4) If leaving Allegany County, what factors affected your decision?
 - a. Lack of Job Availability
 - b. Lack of Housing Availability
 - c. Lack of Amenities
- 5) Would you consider moving back to Allegany County in the future?



Action Item #4: Explore Funding Models for Talent Retention Incentives

Investigate potential funding models for providing first-time home buyers' assistance, tax credits for student loan repayment, and other financial incentives for students who stay in Allegany County for a certain period of time following graduation from Allegany College of Maryland and/or Frostburg State University. Incentive models examined under this Action Item should be evaluated and compared with those examined in Strategy #8, Action Item #3 for commonalities and areas where these mechanisms could be combined or aligned.

Example Incentive Models

First -Time Home Buyer's Assistance: In addition to marketing the State of Maryland's existing first-time home buyer's assistance program, Allegany County could look to County level models such as Grant for Grads in Grant County, Indiana, which provides up to \$5,000 for down payment and/or closing costs that will be forgiven 20% for every year a resident remains in the home. The program also offers up to \$2,500 in rent programs.

Student Loan Repayment: Some counties in the United States offer "Reverse Scholarships" that provide financial incentives upon graduation from universities, sometimes in specific degree programs. These incentives are designed to keep graduating students in the community following completion of their education. Often these programs are designed as "Come Back" programs for communities without higher education offerings. Allegany County, with its existing higher education institutions, is in a unique position to retain talent.



STRATEGY #7 IMPLEMENTATION PLAN

Develop a talent retention strategy aimed at local high school, community college, and university students.

Key Performance Indicators (KPIs)	Initial KPI Targets
Retention rate as measured by graduate survey	50-60%
Number of businesses connected to workforce services	10-15 Businesses over 2-3 years
Number of graduates from advanced career pathway programs	25-30 Graduates over 2-3 years
Number of retained residents offered financial incentives	5-10 Residents over 5 years

Action Items:

1. Inventory Skills Needs through contact with local employers.

- Responsible Organizations: Allegany County DECD; Allegany County Workforce Development Specialist
- Supporting Organization: Allegany County Public Schools; Allegany College of Maryland; Frostburg State University
- Timeline: 6 Months – 1 Year
- Funding Sources: County

Key Steps:

- a. Identify any existing inventory of skills needs available through current partners and additional information needed
- b. Gather information from contact with businesses through the Business Retention and Expansion program
- c. Build upon available data to create a formal process for cataloging information
- d. Designate Allegany County’s Workforce Development Specialist to share information gathered with leadership at Allegany Public Schools, Frostburg State University, and Allegany College of Maryland and connect employers to those resources

2. Connect Local High School Students to Career Pathways

- Responsible Organizations: Allegany County Public Schools; Allegany College of Maryland; Frostburg State University; Allegany County Workforce Development Specialist
- Supporting Organization: Allegany County DECD
- Timeline: 1 – 2 Years
- Funding Sources: Maryland Department of Education; Appalachian Regional Commission



Key Steps:

- a. Inventory existing Career Pathway/Apprenticeship programs and determine gaps in needed skills and available jobs based on information gathered in Action Item #1
- b. Designate Workforce Development Specialist to act as liaison between DECD, local employers, and the region's educational institutions
- c. Develop additional programs/formal pathways based on identified needs in collaboration with local employers and educational institutions

3. Survey Graduating Seniors

- Responsible Organizations: Allegany County Public Schools; Allegany College of Maryland; Frostburg State University
- Supporting Organization: Allegany County DECD
- Timeline: 1 – 2 Years
- Funding Sources: Maryland Department of Education

Key Steps:

- a. Develop survey questions and method of delivery
- b. Include information on resources for finding local employment and housing during survey
- c. Evaluate survey results to estimate retention of graduates, develop benchmarks, and indicators for future success

4. Explore Funding Models for Talent Retention Incentives

- Responsible Organizations: Allegany County DECD
- Supporting Organization: Cumberland Economic Development Corporation; City of Frostburg; City of Cumberland
- Timeline: 3 – 5 Years
- Funding Sources: Local Community Foundation; Allegany County Chamber of Commerce; Tax Revenues

Key Steps:

- a. Research best practices and potential funding models for program
- b. Evaluate costs based on potential models and eligible recipients
- c. Identify available funds
- d. Determine appropriate program model
- e. Evaluate potential for combining program with attraction model in Strategy #8, Action Item #4



STRATEGY #8:

CREATE A TALENT ATTRACTION STRATEGY AIMED AT RECRUITING NEW AND RETURNING RESIDENTS TO THE COUNTY.

While retaining existing talent through retention strategies will help Allegany County keep its current base of residents and skilled workforce, a talent attraction strategy is needed to ensure continued growth. Attraction is the critical second step in this two-phase approach. There are also two components of Allegany County's attraction strategy, bringing in new residents that have never lived in the County before and attracting boomerang residents to return to the County following a period of time living elsewhere. Similar efforts can be made to attract both types of workers to the County, but some specific actions should target returning residents as people with existing relationships in the community might be more likely to return.

Addresses Goal:



Action Items

Action Item #1: Provide Local Employers with Recruitment Materials

Develop a communications strategy and marketing collateral that local employers can share with prospective residents to provide information on the amenities and housing options available in Allegany County.

A series of materials can market different aspects of quality life that would be appealing to all types of workers including housing options, unique outdoor recreational assets, and restaurant options. Additionally, some materials could be targeted to specific industries or occupations. This first action item is designed to address a concern amongst local employers with persuading prospective job candidates to move to Allegany County. These materials will serve as a connection point to the local community, providing new potential residents with knowledge of all that Allegany County has to offer.

This effort should be supported by major employers in the County. Additionally, certain industry sectors could lead the development of materials aimed specifically at workers in their needed occupations. For example, the Western Maryland Health System could lead an effort to attract doctors and nurses, working with the DECD to create marketing materials targeted towards individuals in those occupations.

Action Item #2: Identify Former Residents that are Targets for Attraction

Work with Frostburg State University, Allegany College of Maryland, and Allegany County Public Schools to identify former graduates that may be interested in returning to Allegany County. Develop a system for maintaining contact with graduates that leave Allegany County.

This system can build upon the survey introduced in Strategy #7, Action Item #3 to create a list of graduates that indicate interest in potentially returning to Allegany County. Upon building a database of potential candidates, targeted campaigns can provide quarterly newsletters with information on job listings and general activity in Allegany County. Further sophistication of this



model could align outreach by industry and occupation to target specific skills needed by local employers.

Action Item #3: Identify Target Markets for Talent Attraction Campaigns

Identify target markets by geography and industry for talent attraction campaigns. The previous two action items under this strategy target people with some existing connection to Allegany County, whether as a former resident or one who is at least interested enough to consider employment within the region. This action item begins to target populations without any knowledge of the assets and benefits of living in Allegany County. Because of this lack of connection, the return on investment for blind talent attraction efforts is likely lower and should only be executed following in-depth research into workers in key industries that the County is looking to attract and geographic markets where there may be some appeal.

This effort should include place branding activities that target specific demographic markets that would be interested in moving to Allegany County and fine tuning of the messaging for the specific demographic. One potential target market is tourists to the County. According to a study from Development Counselors International (DCI) on what people look for in jobs and locations, 76% of people form impressions of a community based on first-hand experience.⁴ If visitors to Allegany County have a positive first impression of the area, then they may be more likely to choose to live there in the future.

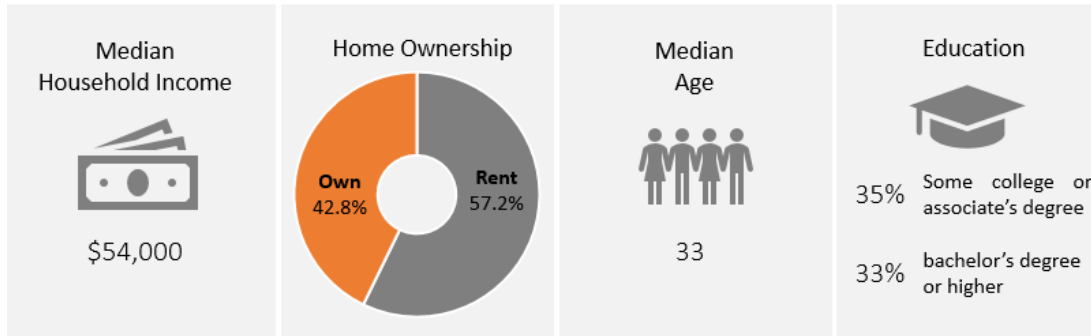
From a workforce standpoint, Allegany County should focus on attracting younger residents, including recent graduates as well as mid-skilled workers in their late 30s and 40s. These two markets may have different decision factors for relocating. Marketing the key selling points of Allegany County that are attractive to all age groups including affordable housing and the cost of living should be a starting point. The availability of amenities within proximity to jobs and a short commute may be a key selling point to recent graduates, while quality schools may be a decision factor for those over the age of 35 with children.⁵ Targeting individuals seeking an urban lifestyle with an interest in outdoor recreation could involve marketing on websites for trail guides and recreational clubs. Other target markets could include individuals in the arts community, entrepreneurs, and telecommuters.

Esri's Tapestry Segmentation can provide insight into a targeted demographic's lifestyle choices, what they buy, and how they spend their free time. Individuals are classified into 67 unique segments. Bright Young Professionals is one segment that includes young, educated, working professionals. This Tapestry group fits into the identified market for workforce attraction, and a profile can be found on the following page.

⁴ Development Counsellors International. "Talent Wars: What People Look for in Jobs and Locations." 2017Q1

⁵ Development Counsellors International. "Go Fish: How to Reel in Tomorrow's Talent." 2018Q2





Source: ESRI Tapestry Segmentation, 8C Bright Young Professionals

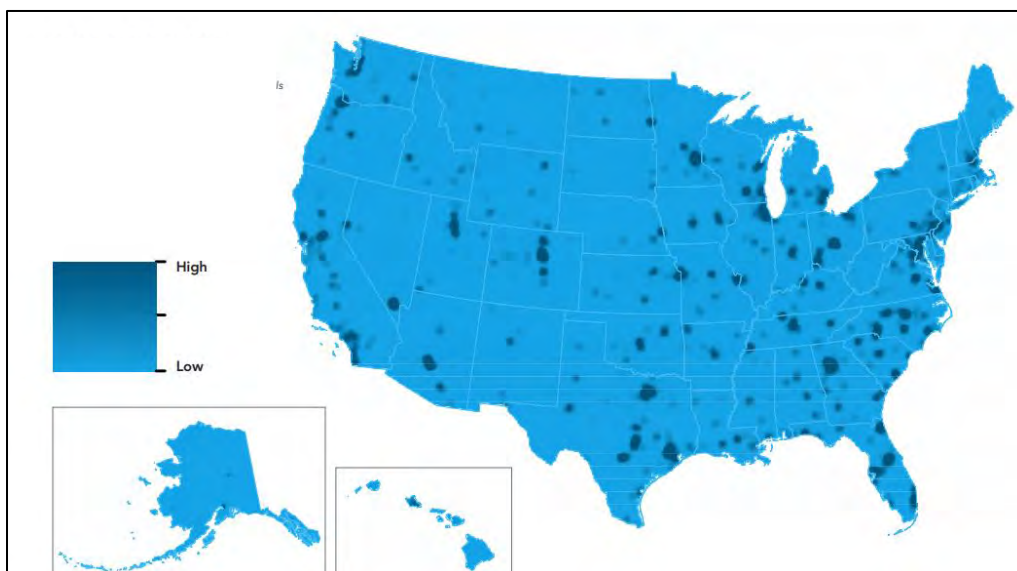
Top job occupations for this market include:

- Office and Administrative Support;
- Sales;
- Management;
- Transportation and Material Moving; and
- Food Preparation and Serving Related.

Additionally, this market receives most information from the Internet. Utilizing an online marketing campaign or news outlets will be most successful in reaching individuals. Concern for the environment and impacts on purchasing decisions are both focuses of Bright Young Professionals. Therefore, local and sustainable farm-to-table restaurants, Fair Trade goods, and environmentally friendly options are important to implement in the County to attract this demographic.

Below is a density map showing the location of individuals within the 'Bright Young Professionals' market that fit the description of those Allegany should focus on attracting. These individuals are likely living on the outskirts of large metropolitan areas.

Density Map of Esri's Identified Bright Young Professionals



Source: Esri Tapestry Segmentation, 8C Bright Young Professionals, 2018



Action Item #4: Explore Funding Models for Talent Attraction Incentives for Employers

Investigate potential incentives for employers that provide relocation assistance, first-time homebuyers' assistance, and other financial incentives to new employees that relocate to Allegany County for work. Similar to Strategy #7, Action Item #4, these incentives would look to provide financial rewards to potential residents that move to Allegany County. This incentive could take a variety of forms, some of which mirror those in the previous action item. Alternatively, the county could provide incentives to businesses that offer relocation bonuses or other assistance to new employees that move from outside of Allegany County. The overall goal will be to make it more attractive and financially viable for residents to make the decision to move to Allegany County, whether as a new or returning resident.

In addition to evaluating the form in which to offer these incentives, the County should consider multiple funding options. In many counties that offer grants and incentives to new residents, funding comes from local community foundations that are supported by donors. Investigating potential methods of making these incentives budget neutral or leveraging resources outside of County revenues will increase the likelihood of garnering public support as well as ensuring financial viability prior to offering incentives.

Example Incentive Model

Property Tax Credits: The County could provide property tax credits to local employers that offer relocation assistance to potential employees. This indirect benefit could encourage and allow more employers to offer this type of assistance and make it more financially feasible for prospective residents to make the move to Allegany County.



STRATEGY #8 IMPLEMENTATION PLAN

Create a talent attraction strategy aimed at recruiting new and returning residents to the County.

Key Performance Indicators (KPIs)	Initial KPI Targets
Number of employers provided recruitment materials to distribute to potential employees	30-50 over 2-3 years
Number of employees that accept jobs after being provided additional recruitment materials	10-15 Employees over 2-3 years
Number of former residents attracted through outreach	10-15 Former Residents over 5 years
Number of employers offering relocation assistance	3-5 Employers over 5 years

Action Items:

1. Provide Local Employers with Recruitment Materials

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Local Employers; Allegany County DECD
- Timeline: 1 – 2 Years
- Funding Sources: County

Key Steps:

- a. Identify key characteristics or information to include in materials (i.e. housing, unique recreational assets, restaurant options, etc.)
- b. Develop content and marketing materials
- c. Share with local employers via BRE meetings, Allegany County DECD, and the Allegany County Chamber of Commerce
- d. Identify specific industries/occupations for which to develop unique materials
- e. Contact local employer partners to help develop and provide unique information

2. Identify Former Residents that are Targets for Attraction

- Responsible Organization: Frostburg State University; Allegany College of Maryland; Allegany County Public Schools
- Supporting Organizations: Allegany County DECD
- Timeline: 2 – 3 Years
- Funding Sources: County

Key Steps:

- a. Identify former graduates that may be interested in returning to Allegany County
- b. Develop quarterly newsletter to potential candidates that provides information on job listings and recent news in the County
- c. Continue to develop contact list based on information gathered from the graduate survey in Strategy #7, Action Item #3



3. Identify Target Markets for Talent Attraction Campaigns

- Responsible Organization: Frostburg State University; Allegany College of Maryland; Allegany County Public Schools; Local Employers
- Supporting Organizations: Allegany County DECD
- Timeline: 2 – 3 Years
- Funding Sources: County

Key Steps:

- a. Determine target occupations/industries needed in the County
- b. Identify geographic markets for potential residents based on presence of key occupations/industries
- c. Evaluate decision factors for target demographics to develop content for messaging

4. Explore Funding Models for Talent Attraction Incentives for Employers

- Responsible Organization: Allegany County DECD
- Supporting Organizations: Allegany County Chamber of Commerce
- Timeline: 3– 5 Years
- Funding Sources: Local Community Foundation; Chamber of Commerce; Tax Revenues

Key Steps:

- a. Research best practices and potential funding models for program
- b. Evaluate costs based on potential models and eligible recipients
- c. Identify available funds
- d. Determine appropriate program model
- e. Evaluate potential for combining program with attraction model in Strategy #7, Action Item #4



STRATEGY #9:

MARKET ALLEGANY COUNTY AS AN OVERNIGHT TRIP DESTINATION FROM REGIONAL ANCHORS IN BALTIMORE, WASHINGTON, D.C., AND PITTSBURGH.

Allegheny County currently sees a large number of visitors every year due to local attractions, including outdoor recreation assets such as the Great Allegheny Passage (GAP) Trail and Chesapeake & Ohio (C&O) Towpath. While the number of visitors currently passing through may be large, additional overnight visitors would increase revenue through additional hotel bookings, longer engagement with downtown businesses and shops, and the purchase of services and amenities while in Allegheny County. In order to achieve a greater number of overnight visitors, Allegheny County needs to develop programming that promotes local attractions that will encourage visitors to stay longer and spend more. Additional marketing campaigns can target specific types of visitors by packaging tourism products into two-day trips that encourage visitors to spend more time in Allegheny County.

Addresses Goal:



Action Items

Action Item #1: Develop Marketing Campaigns that Promote Overnight Travel

Develop marketing campaigns to promote attractions and destination awareness with goal of packaging activities that will encourage overnight travel to Allegheny County.

Allegheny County has a number of local attractions that have the potential to draw a diverse range of visitors to the County. However, many people may visit the County for individual activities, in particular passing through on the GAP and C&O trails without gathering a full understanding of the activities available within the community. In order to encourage additional overnight travel to the County, the development of trip packages that offer themed getaways for different target markets can provide visitors with example itineraries to fill multiple days in the County.

While this campaign would look to improve awareness of local tourist destinations for visitors and existing residents alike, the campaign would focus on lengthening the stay of visitors to Allegheny County. Two likely groups for targeting include “Young Outdoor Adventurers” and “Families.”

Young Outdoor Adventurers may be attracted to packages that market the trails and state and recreational parks with a number of downtown activities, including wineries, breweries, and restaurants.

Family travelers may be targeted by packaging together a variety of historic site-seeing, recreational, and other family friendly activities. Specific examples of activities that can be marketed in these packages include the Western Maryland Scenic Railroad and annual events.



Example Two-Day Packages

Plan Your Family Vacation to Allegany County

Day #1 Morning: Hop on Board the Western Maryland Scenic Railroad! View the County as your family experiences the scenic views of the Mountain Side of Maryland.

Day #1 Afternoon: Head to Allegany Museum or check out local family friendly events!

Day #2 Morning: Visit Rocky Gap State Park for a 5-mile loop trail for mountain biking or hiking. Or rent a canoe or kayak and enjoy Lake Habeeb firsthand.

Day #2 Evening: End your family's stay in Allegany County by exploring dining options in downtown Cumberland and Frostburg.

Plan Your Outdoor Getaway to Allegany County

Day #1 Morning: Head to Green Ridge State Forest for hiking and trails – including the views alongside Fifteen Mile Creek.

Day #1 Afternoon: Head to downtown Cumberland or Frostburg to sample local favorites.

Day #2 Morning: Rent bikes from one of our County's outfitters and bike the GAP Trail, starting in Frostburg and ending in Cumberland

Day #2 Evening: Head to downtown Cumberland or Frostburg to sample local winery and brewery offerings.

Action Item #2: Target Nearby Markets to Attract Visitors within Driving Distance to Allegany County

Target Baltimore, Washington, D.C., and Pittsburgh markets. Allegany County's location is one of its greatest assets. With such close proximity to these major markets, the County should target residents and visitors in these communities for outdoor recreational excursions. Crafting an "Escape from the City!" message can lure the outdoor recreational tourists that Allegany County is targeting. Leveraging digital and social media campaigns will help the County more efficiently engage these markets and potential visitors through strategic media outlets tailored to each demographic.



STRATEGY #9 IMPLEMENTATION PLAN

Market Allegany County as an overnight trip destination from regional anchors in Baltimore, Washington, D.C., and Pittsburgh.

Key Performance Indicators (KPIs)	Initial KPI Targets
Hotel/motel tax revenue	Increase 5% over 5 years
Tourism product visitors	Increase 5% over 5 years
Website traffic (Total visits, pages per visit, average visit duration, bounce rate)	Increase 5% over 5 years
Social media engagement (Number of impressions, engagement rate)	Increase 5% over 5 years

Action Items:

1. Develop Marketing Campaigns that Promote Overnight Travel

- Responsible Organization: Allegany County Tourism
- Supporting Organization: Tourism Committee
- Timeline: 1 – 2 Years
- Funding Sources: Maryland Office of Tourism Development

Key Steps:

- a. Identify and catalogue potential tourism for packaging
- b. Work with partners to develop packages
- c. Create marketing materials – flyers, social media content, etc.
- d. Develop cost savings packages with partners where possible

2. Target Nearby Markets to Attract Visitors within Driving Distance to Allegany County

- Responsible Organization: Allegany County Tourism
- Supporting Organization: Tourism Committee
- Timeline: 1 – 2 Years
- Funding Sources: Maryland Office of Tourism Development

Key Steps:

- a. Craft appropriate message for overnight trip and accompanying marketing message
- b. Utilize social media and online advertising
- c. Target Baltimore, Washington, D.C., and Pittsburgh markets



STRATEGY #10:

ENHANCE EXISTING TOURISM PRODUCTS, WHILE DIVERSIFYING AND EXPANDING OFFERINGS.

Allegany County has spent decades building its diverse selection of tourism products and should continue this effort by investing in improvements and additional activities to enhance and diversify the options available. In particular, the County and its tourism-related partners should create better connections between the existing trails, the downtown areas of Cumberland and Frostburg, and the Western Maryland Scenic Railroad. Adding additional recreational activities through the development of state parks can also attract new visitors.

Addresses Goal:



Many of these action items involve building partnerships amongst the different organizations and groups supporting tourism in Allegany County. Thus, many of these items should be supported by the Tourism Committee established in Strategy #4. With the Allegany County Tourism Director leading and coordinating efforts to establish partnerships and increase conversations between organizations, a more concerted effort to improve product offerings can take place.

Action Items

Action Item #1: Develop Compelling Gateway Entrances from Major Trails

Develop compelling gateways into Frostburg and Cumberland from the GAP and C&O trails and the Western Maryland Scenic Railroad. Consider unique ways to move people from the trails/railroad to downtown areas. The downtown areas are the entry points for many visitors that come from either Washington, D.C. or Pittsburgh along the GAP or C&O Trails. Making these connections as inviting as possible will help draw more visitors into businesses in the downtown areas. Creating visual art pieces, thematic wayfinding, and pedestrian enhancements will improve visitors' first impression and ensure that they know when they have entered the community.

Immediate efforts should focus on signage, lighting, and walkway improvements. Longer term efforts should focus on physical improvements such as right-of-way enhancements for pedestrian safety, water access, and consistent branding and signage throughout the Gateway Entrances.

Action Item #2: Continue Efforts to Pursue the Canal Place River Park in Cumberland

Pursue efforts to revitalize and enhance the Potomac River in Cumberland developing a natural river park and exceptional river access areas. These efforts can build on and leverage existing initiatives, such as The River Park at Canal Place project⁶, which will revitalize and renew the downtown area of Cumberland. The project would also establish a new tourism product for visitors to explore with enhanced river access and recreational areas. The successful completion of this project would be major boon to tourism in the County, which could be leveraged to attract

⁶ Details on the plan can be found at <https://canalplace.org>



additional visitors. Additional efforts to leverage this project and connect it to existing nearby assets could greatly enhance the overall connectivity and visitor experience of Downtown Cumberland.

Action Item #3: Develop Partnerships to Create Additional Tourism Products

Explore public-private partnerships to create additional family entertainment opportunities at the Rocky Gap State Park and Casino. Partner with the state to expand programming and events at Green Ridge State Forest to attract visitors and create local awareness. Identify opportunities to leverage The Maryland Department of Natural Resources' plan to purchase land and provide public access to Wills Mountain State Park.



STRATEGY #10 IMPLEMENTATION PLAN

Enhance existing tourism products, while diversifying and expanding offerings.

Key Performance Indicators (KPIs)	Initial KPI Targets
Number of gateway improvements in downtown areas	2-3 Improvements over 5 years
Number of new tourism products developed or marketed	3-5 Products over 5 years

Action Items:

1. Develop Compelling Gateway Entrances from Major Trails

- Responsible Organizations: City of Cumberland; City of Frostburg
- Supporting Organizations: Allegany County Tourism; Frostburg First
- Timeline: 1 – 2 Years
- Funding Sources: Maryland Department of Housing and Community Development; Maryland Historical Trust

Key Steps:

- a. Identify low-cost improvements including signage, lighting, and walkway improvements
- b. Prioritize available funding for low-cost improvements
- c. Develop plans, renderings, and cost estimates for high-cost, long-term investment
- d. Prioritize available funding for high-cost improvements

2. Continue Efforts to Pursue the Canal Place River Park in Cumberland

- Responsible Organizations: City of Cumberland; Canal Place Preservation and Development Authority
- Supporting Organization: Allegany County Tourism
- Timeline: 2 – 3 Years
- Funding Sources: Maryland Historical Trust

Key Steps:

- a. Revise/finalize Request for Proposals as needed
- b. Identify developer
- c. Initiate development
- d. Market the development during construction and following completion of the Park

3. Develop Partnerships to Create Additional Tourism Products

- Responsible Organizations: Allegany County Tourism; Maryland Department of Resources
- Supporting Organization: Tourism Committee
- Timeline: 3 – 5 Years



- Funding Sources: Maryland Department of Natural Resources

Key Steps:

- Work with the Maryland Department of Natural Resources to identify and prioritize key areas for additional tourism development
- Determine costs and funding needs for additional products
- Evaluate public-private partnership model to close funding gaps where needed

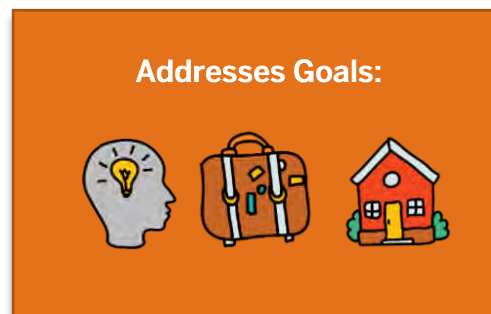


STRATEGY #11:

REVITALIZE DOWNTOWN CUMBERLAND AND FROSTBURG THROUGH CONCERTED EFFORTS TO BUILD QUALITY OF PLACE, RENOVATED AND IMPROVED HOUSING, AND INFRASTRUCTURE IMPROVEMENTS.

Downtown Cumberland and Frostburg serve as anchors that drive Allegany County's economic development. Both downtown areas provide a concentration of restaurants, hotels, and other quality of place amenities that can attract visitors and residents alike. As drivers of change in the County, both require strategic capital investment and programming to further develop them as destinations within the County. Specifically, efforts should be made to fill vacant buildings along the Baltimore

Street corridor in Cumberland, attract new and viable businesses in both downtown areas by leveraging Opportunity Zone funds, and improve the overall street level experience for visitors. Additional signage and parking options in tandem with marketing efforts will promote awareness of downtown businesses and attractions while improving overall visitor experience. By focusing on key action items in both Downtown areas Allegany County can develop quality of place in both historic downtowns that will attract residents and visitors to support new and existing businesses.



Action Items

Action Item #1: Enhance Signage and Pathways to Improve Visitor Experience to Downtown

Build upon current efforts to improve the trail gateways into Cumberland to further develop signage around Baltimore Street to direct pedestrians to nearby sites, local businesses, and parking in Downtown Cumberland. Additionally, assess downtown parking options to determine where design interventions can improve accessibility between parking facilities and downtown attractions. Key considerations should include distance, safety, and location of facilities. Where relevant, utilize additional signage to identify street parking and clarify time limits in downtown Cumberland and Frostburg.

Action Item #2: Leverage Opportunity Zones and Additional Incentives to Attract Investment

Market Qualified Opportunity Zones in Allegany County to attract prospective investors into downtown Cumberland and Frostburg. Develop marketing materials profiling the characteristics and potential projects in each zone to engage outside developers. Opportunity Zones can be leveraged as a strategy to provide incentives that will make locating in vacant businesses on Baltimore Street attractive to potential occupants. Marketing materials can include available properties for investment as well as demographic and industry related data specific to Allegany County, Cumberland or Frostburg, and for each Opportunity Zone being profiled.



Action Item #3: Explore Potential Town Events and Campaigns to Increase Foot Traffic for Local Businesses

Explore feasibility of annual events or campaigns to encourage Allegany residents to visit Downtown Cumberland and Frostburg in order to showcase new and local restaurants and businesses. This will help promote resident awareness of new and local attractions. Local social media, including County and city Facebook and Twitter pages, and print media can be used to market these events to residents in the community. This effort can also be included in County marketing plans to attract visitors from outside of Allegany County. Annual events can be included in the County's annual visitor guide and general online marketing campaigns. Themed events should be marketed towards particular types of visitors. For example, the County may target wine clubs for attendance at the town wine festival.

Action Item #4: Finance and Develop Market Rate Apartments on Baltimore Street

Design a financial model and solicit potential developers for market rate apartments above retail space as part of downtown Baltimore Street revitalization. The City of Cumberland and the Cumberland Economic Development Corporation (CEDC) are currently in the process of finalizing design plans for improvements to Baltimore Street in Downtown Cumberland. As part of this effort, the community should ensure that these improvements can be leveraged to attract additional investment to make second-story market rate apartments feasible. This would help grow the customer market in downtown by attracting new residents that can support existing businesses along Baltimore Street.



STRATEGY #11 IMPLEMENTATION PLAN

Revitalize Downtown Cumberland and Frostburg through concerted efforts to build quality of place, renovated and improved housing, and infrastructure improvements.

Key Performance Indicators (KPIs)	Initial KPI Targets
Number of signage and wayfinding improvements made to pedestrian paths implemented in downtown Cumberland and Frostburg including installation of new or improvement of existing signage	5-10 Improvements over 5 years
Number of new investments made in Opportunity Zones	2-3 Investments over 5 years
Total number of events or festivals	5-10 Events over 5 years
Increase in downtown purchases and business patronage	2-3% Increase over 5 years
Total number of rehabbed units above Baltimore Street	3-5 Units over 5 years

Action Items:

1. Enhance Signage and Pathways to Improve Visitor Experience to Downtown

- Responsible Organizations: Cumberland Economic Development Corporation; City of Cumberland; City of Frostburg
- Supporting Organizations: Allegany County DECD
- Timeline: 1 – 2 Years
- Funding Sources: Maryland DHCD; US HUD

Key Steps:

- a. Assess downtown parking options to determine where design interventions can improve accessibility between parking facilities and downtown attractions
- b. Utilize additional signage to identify street parking and clarify time limits in downtown Cumberland and Frostburg

2. Leverage Opportunity Zones and Additional Incentives to Attract Investment

- Responsible Organizations: Cumberland Economic Development Corporation; City of Cumberland; City of Frostburg
- Supporting Organizations: Allegany County DECD
- Timeline: 2 – 3 Years
- Funding Sources: Maryland DHCD; US HUD

Key Steps:

- a. Develop marketing materials profiling the characteristics and potential projects in each zone to engage outside developers
- b. Include available properties for investment as well as demographic and industry related data specific to Allegany County, Cumberland or Frostburg, and for each Opportunity Zone being profiled



3. Explore Potential Town Events and Campaigns to Increase Foot Traffic for Local Businesses

- Responsible Organizations: Cumberland Economic Development Corporation; City of Cumberland; City of Frostburg; Downtown Development Commission; Frostburg First
- Supporting Organizations: Allegany County DECD
- Timeline: 3 – 5 Years
- Funding Sources: Local Funders

Key Steps:

- a. Inventory existing town events
- b. Use local social media, including County and city Facebook and Twitter pages, and print media to market events to residents in the community
- c. Include annual events in the County's annual visitor guide and general online marketing campaigns
- d. Identify potential permitting/regulatory changes to encourage additional events and establish partnerships where needed

4. Finance and Develop Market Rate Apartments on Baltimore Street

- Responsible Organizations: City of Cumberland; Cumberland Economic Development Corporation
- Supporting Organizations: Allegany County DECD
- Timeline: 3 – 5 Years
- Funding Sources: Maryland DHCD; US HUD

Key Steps:

- a. Inventory real estate on Baltimore Street for potential market rate apartments in upper stories
- b. Work with property owners to evaluate willingness to invest and potential funding needs
- c. Identify available funds and grants
- d. Streamline permitting process to reduce development costs



STRATEGY #12:

EXPAND RESIDENTIAL AND COMMERCIAL BROADBAND COVERAGE IN ALLEGANY COUNTY

Broadband connectivity is a growing issue for communities across the country. Individuals and businesses alike have come to expect increasing connectivity that enables high-speed data processing, teleworking, and at-home entertainment. Residents have cited a lack of options when selecting service providers and expensive pricing compared to nearby markets as a key challenge in Allegany County. As part of making Allegany County an attractive place to live and do business, the County should focus on expanding broadband and provider options and coverage to serve more needs and areas of the County.

Addresses Goal:



The most significant broadband network in the County is the Allegany County Network (AllCoNet), founded in 1996 to provide the County with broadband coverage that today serves 85% of residents and 95% of businesses in Allegany County.⁷ Additionally, the CONXX platform has contributed to the integration of new technologies into Allegany County's existing broadband infrastructure.

Major Service Providers:

- AllCoNet
- AT&T
- Atlantic Broadband
- Comcast
- Conxx
- Segra
- NetworkMD
- Shentel
- Skypacket
- Sprint
- TWR
- US Cellular
- Verizon

Moving forward, a crucial part of securing Allegany County's ability to attract new residents and industries will be to continue to expand and improve broadband access in the County. Current efforts include a proposed portion of funds for Capital Improvement Projects in FY2019-23 and the inclusion of fiber installation in efforts to revitalize Baltimore Street in Downtown Cumberland at the local level. State level efforts include the One Maryland Broadband Network (OMBN) which aims to connect anchor institutions across the state to broadband technology.

Maryland Broadband Cooperative (MDBC) fiber currently runs east to west through Allegany County, reaching Cumberland and Frostburg. Additional fiber extends toward the south from Frostburg and to the border with West Virginia.⁸ Due to topography, installing fiber to some areas of the County is cost prohibitive, requiring alternative technologies such as TV White Space or other broadband alternatives to fiber.

Increased broadband coverage in Allegany County is an important infrastructure investment that will ensure that the County is able to maintain a competitive advantage in an increasingly digital world. The County hosts several institutions that demonstrate the current and potential need for modern broadband technology. Among them are the Allegany College of Maryland,

⁷ <http://conxx.net/projects/allegany-county-maryland/>

⁸ Interactive map accessed at Maryland Broadband Cooperative website: <https://mdbc.us/coverage-map>



Frostburg State University, and Exclamation Labs!. A concerted broadband strategy should play an integral role in the County's ongoing economic development efforts.

Action Items

Action Item #1: Identify Target Areas for Broadband Fiber and Service Expansion

The 2012 Broadband Study commissioned by the Board of Education documented strategies and locations to align future resources to expand broadband options for public institutions, economic development efforts, and residential use. AllCoNet, with the support of Allegany County DECD, should evaluate the areas and projects listed in the Broadband Study to determine which have been completed, are in progress, or are no longer a high-priority based on the County's economic development strategies. Areas where new projects have been developed, initiated or planned since the inception of the Broadband Study should be added to this list, in addition to any that AllCoNet and the Allegany County DECD view as target areas for broadband projects. Projects to consider might include interconnection between AllCoNet and the Maryland Broadband Co-op and/or diversifying connectivity options at industrial parks.

Action Item #2: Evaluate Project Costs and Project Feasibility

Each potential area and project on this list should be prioritized based on the need and difficulty to implement. Key factors will include cost, available staff and resources, and project impact. The 2012 Broadband Study includes potential project costs which should serve as the basis for estimated costs. Updates can be made where costs have grown, modifications to projects are made, or where new projects have been incorporated into the broadband strategy. The total gap between available resources and project cost should be used as a benchmark for the funding scan conducted in Action Item #3.

Action Item #3: Identify Funding Sources and Potential Grants

AllCoNet will lead the process of identifying potential funding options that include Federal, State, and private sources. Existing federal broadband funding sources include the U.S. Department of Agriculture (USDA) and National Telecommunications and Information Administration (NTIA). The One Maryland Broadband Network and the Appalachian Regional Commission (ARC) are two potential partners with an established interest in promoting broadband coverage in Maryland. Additional supporting organizations should be engaged depending on the target area where they have an interest in improved broadband access to an area. AllCoNet, with the support of Allegany County DECD, should lead the application process to secure additional funds.

Action Item #4: Identify Likely Lead and Partner(s) Responsible for Implementing Broadband

The responsible parties for leading the process of securing additional funds and implementing broadband projects is highly dependent on the proposed project. Additionally, depending on where new projects intersect, existing fiber will dictate the number of involved parties required for partnering. AllCoNet should lead the process of identifying and engaging the likely lead and partners responsible for relevant broadband projects. For example, projects with a high impact on local institutions may include representatives from those institutions, while projects with a high footprint in either the City of Cumberland or the City of Frostburg may involve the city government or the Cumberland Economic Development Corporation. Partnerships should be formed on an ad hoc basis for a particular project and be led by AllCoNet.



STRATEGY #12 IMPLEMENTATION PLAN

Expand residential and commercial broadband coverage in Allegany County.

Key Performance Indicators (KPIs)	Initial KPI Targets
Total fiber length installed in Allegany County	10-15 miles over 5 years
Number of households and businesses connected to broadband	3-5% Increase in households and increase in businesses over 5 years
Number of anchor institutions served by broadband services	5-8 Institutions 5 years
External funding secured for broadband expansion	1-2 External funding sources within 2-3 years

Action Items:

1. Identify Target Areas for Broadband Fiber and Service Expansion

- Responsible Organization: AllCoNet
- Supporting Organizations: Allegany County DECD
- Timeline: 6 Months – 1 Year
- Funding Sources: County

Key Steps:

- a. Evaluate progress on the areas and projects listed in the Broadband Study
- b. Add new projects that have been developed, initiated, or planned since the completion of the Broadband Study to the listed target areas

2. Conduct Project Feasibility Analysis

- Responsible Organization: AllCoNet
- Supporting Organizations: Allegany County DECD
- Timeline: 6 Months – 1 Year
- Funding Sources: County

Key Steps:

- a. Identify cost, available staff and resources, and the project impact

3. Identify Funding Sources and Potential Grants

- Responsible Organization: AllCoNet
- Supporting Organizations: Allegany County DECD
- Timeline: 1 – 2 Years
- Funding Sources: USDA, NTIA, State of Maryland

Key Steps:

- a. Develop inventory of potential funding sources and grants
- b. Evaluate guidelines and requirements for grants to determine applicability to particular projects



- c. Consider needed staff resources for grant writing and management

4. Identify Likely Lead and Partner(s) Responsible for Implementing Broadband

- Responsible Organization: AllCoNet
- Supporting Organizations: Allegany County DECD; Others as needed
- Timeline: 3 – 5 Years
- Funding Sources: USDA, NTIA, State of Maryland

Key Steps:

- a. Identify and engage potential partners responsible for relevant broadband projects
- b. Develop partnership agreements between organizations where needed





Chapter 7: Implementation Matrix



MOUNTAIN MARYLAND
TOURISM • COMMERCE • PARTNERSHIPS



Implementation Matrix

	Responsible Organization(s)	Supporting Organization(s)	1-6 Mo.	6 Mo. - 1 Yr.	1-2 Yr.	2 - 3 Yr.	3- 5 Yr.	
Strategy #1: Reinforce and implement roles for economic development organizations along clear objectives and desired outcomes. (See pg. 33)								
Action Item #1: Affirm the Main Point of Contact	DECD	Maryland DECD						
Action Item #2: Allegany County Economic Development Partners Roundtable	DECD	DECD						
Action Item #3: Allegany County Economic Development Performance Metrics	DECD	DECD						
Action Item #4: Align Economic Development Project Wins with the Allegany County Chamber's Outstanding Business Recognition Dinner	DECD the Allegany County CHAMBER	DECD						
Strategy #2: Outline a concerted Business Attraction implementation plan. (See pg. 51)								
Action Item #1: Enhanced Alignment with State Economic Development Partners	DECD	Maryland DECD						
Action Item #2: Leverage Traditional and Social Media Marketing	DECD	DECD						
Action Item #3: Establish a Formal Business Development Travel Schedule	DECD	DECD						
Strategy #3: Develop a formal Business Retention & Expansion (BRE) Program. (See pg. 58)								
Action Item #1: Develop or Enhance a Formal List of Existing Primary Industry Businesses	DECD	DECD						
Action Item #2: Develop a Formal BRE Program Infrastructure	DECD	DECD						
Action Item #3: Develop a BRE Survey	DECD	DECD						
Action Item #4: Prioritize BRE Visits	DECD	DECD						
Action Item #5: Adopt a Customer Relationship Management ("CRM") Platform	DECD	DECD						
Action Item #6: Market the BRE Program	DECD	DECD the Allegany County CHAMBER						
Strategy #4: Collaborate with private sector leadership to establish committees to advance the County's economic development efforts. (See pg. 66)								
Action Item #1: Identify Private Sector Leaders to Engage in Economic Development Efforts	DECD the Allegany County CHAMBER	DECD						
Action Item #2: Establish Economic Development Committees	DECD the Allegany County CHAMBER	DECD ALLEGANY COUNTY MOUNTAIN SIDE OF MARYLAND						
Strategy #5: Engage housing developers and financiers from external markets such as Baltimore, Washington DC, and Pittsburgh to provide localized models for funding new and redeveloped housing. (See pg. 69)								
Action Item #1: Survey and Prioritize Housing Needs	DECD	DECD						
Action Item #2: Inventory Potential Development Sites	DECD	DECD						
Action Item #3: Target and Engage with Potential Developers	DECD	DECD						
Action Item #4: Establish a Public Private Partnership	DECD	DECD						
Strategy #6: Develop an owner-occupied home improvement assistance program to encourage renovations of existing housing. (See pg. 73)								
Action Item #1: Identify Funds for Owner-Occupied Home Improvements	DECD	DECD						
Action Item #2: Design Program Guidelines to Prioritize Use of Funds	DECD	DECD						
Strategy #7: Develop a talent retention strategy aimed at local high school, community college, and university students. (See pg. 76)								
Action Item #1: Inventory Skills Needs through Contact with Local Employers	DECD Workforce Development Specialist	ACPS FROSTBURG ALLEGANY COLLEGE						
Action Item #2: Connect Local High School Students to Career Pathways	ACPS FROSTBURG ALLEGANY COLLEGE	DECD						
Action Item #3: Survey Graduating Seniors	ACPS FROSTBURG ALLEGANY COLLEGE Workforce Development Specialist	DECD						
Action Item #4: Explore Funding Models for Talent Retention Incentives	DECD	DECD						
Strategy #8: Create a talent attraction strategy aimed at recruiting new and returning residents to the County. (See pg. 81)								
Action Item #1: Provide Local Employers with Recruitment Materials	DECD	Local Employers the Allegany County CHAMBER						
Action Item #2: Identify Former Residents that are Targets for Attraction	FROSTBURG ALLEGANY COLLEGE ACPS	DECD						
Action Item #3: Identify Target Markets for Talent Attraction Campaigns	ACPS FROSTBURG ALLEGANY COLLEGE Local Employers	DECD						
Action Item #4: Explore Funding Models for Talent Attraction Incentives for Employers	DECD	the Allegany County CHAMBER						
Strategy #9: Market Allegany County as an overnight trip destination from regional anchors in Baltimore, Washington, D.C., and Pittsburgh. (See pg. 87)								
Action Item #1: Develop Marketing Campaigns that Promote Overnight Travel	ALLEGANY COUNTY MOUNTAIN SIDE OF MARYLAND	Tourism Committee						
Action Item #2: Target Nearby Markets to Attract Visitors within Driving Distance to Allegany County	ALLEGANY COUNTY MOUNTAIN SIDE OF MARYLAND	Tourism Committee						
Strategy #10: Enhance existing tourism products, while diversifying and expanding offerings. (See pg. 90)								
Action Item #1: Develop Compelling Gateway Entrances from Major Trails	ALLEGANY COUNTY MOUNTAIN SIDE OF MARYLAND	ALLEGANY COUNTY MOUNTAIN SIDE OF MARYLAND FROSTBURG						
Action Item #2: Continue Efforts to Pursue the Canal Place River Park in Cumberland	CANAL PLACE	ALLEGANY COUNTY MOUNTAIN SIDE OF MARYLAND						
Action Item #3: Develop Partnerships to Create Additional Tourism Products	ALLEGANY COUNTY MOUNTAIN SIDE OF MARYLAND MARYLAND DEPARTMENT OF NATURAL RESOURCES	Tourism Committee						
Strategy #11: Revitalize Downtown Cumberland and Frostburg through concerted efforts to build quality of place, renovated and improved housing, and infrastructure improvements. (See pg. 94)								
Action Item #1: Enhance Signage and Pathways to Improve Visitor Experience to Downtown	DECD	DECD						
Action Item #2: Leverage Opportunity Zones and Additional Incentives to Attract Investment	DECD	DECD						
Action Item #3: Explore Potential Town Events and Campaigns to Increase Foot Traffic for Local Businesses	DECD	DECD						
Action Item #4: Finance and Develop Market Rate Apartments on Baltimore Street	DECD	DECD						
Strategy #12: Expand residential and commercial broadband coverage in Allegany County. (See pg. 98)								
Action Item #1: Identify Target Areas for Broadband Fiber and Service Expansion	ALLCONET	DECD						
Action Item #2: Conduct Project Feasibility Analysis	ALLCONET	DECD						
Action Item #3: Identify Funding Sources and Potential Grants	ALLCONET	DECD						
Action Item #4: Identify Likely Lead and Partner(s) Responsible for Implementing Broadband	ALLCONET	DECD Others as needed						

Chapter 8: Projects



PROJECTS

In order to spur economic development efforts in the County, some development, redevelopment, and infrastructure projects are needed. The following projects represent existing efforts that should be continued and prioritized as efforts contributing to overall goals and strategies outlined in the Economic Development Strategic Plan.

PROJECT LIST

Project	Description	Location	Status
Baltimore Street Improvements	Improvements to infrastructure will potentially improve fire suppression capability to create 2 nd floor residential options and open up Baltimore Street to one-way traffic with bike lanes.	Baltimore Street, Cumberland	Finalizing Designs
Former Memorial Hospital Site	The former Memorial Hospital site was demolished in 2014 following the construction of the new combined hospital site for Western Maryland Regional Medical Center opened in 2009.	Memorial Avenue, Cumberland	Project Initiation
Cumberland Chase Development	The Cumberland Chase property is located near the Barton Business Park. At nearly 2,000 acres, the County is planning for a commercial and residential housing development with townhomes and a potential assisted living center.	Rawlings	RFP Issued
Former Allegany High School site	Apart from the recreational fields, the former Allegany High School, located on Sedgwick Street, will no longer be used following the 2018-2019 school year. Next steps for the building and site will need to be established.	Sedgwick Street, Cumberland	Project Initiation
Willowbrook Outdoor Wellness (WOW) Spot	The Willowbrook Outdoor Wellness (WOW) Spot will be an outdoor recreational facility located on unused land near the Allegany College of Maryland.	Cumberland	In Progress
Autonomous Technology Center	A recent feasibility study looked at the opportunity for an Autonomous Technology Center.	Region	In Progress



Project	Description	Location	Status
Nickel Building	The Nickel Building located in Downtown Frostburg is a historic building in need of investment and redevelopment. The City of Frostburg is in the process of issuing an RFP for the project.	Frostburg	RFP Issued
The River Park at Canal Place	The River Park at Canal Place is a proposed whitewater park along the Potomac River in downtown Cumberland, MD. The River Park will be constructed as an addition to Canal Place Park, a 58.1-acre historic preservation park located at the confluence of Wills Creek and the Potomac River.	Cumberland	RFP Issued
Senior Housing Development	A development aimed at senior housing, or aging in place, would be a catalyst in the community for creating unique housing opportunities that adapt to the needs of certain demographics.	Unknown	New Project
M&T Building	The Cumberland Economic Development Corporation has purchased the former M&T Bank regional headquarters building on Baltimore Street in order to spur redevelopment of the site following the completion of infrastructure improvements on Baltimore Street.	Cumberland	In Progress
Maryland Avenue Project	The Cumberland Economic Development Corporation is currently undergoing a master plan project for this area in order to spur development over the next 15-20 years	Cumberland	In Progress
Center Street Project	The City of Frostburg is acquiring strategic properties along Center Street in order to demolish the existing homes and market the land for new mixed-use, pedestrian-oriented development.	Frostburg	In Progress



BALTIMORE STREET IMPROVEMENTS

Support Goals:



Key Milestones & Action Items:

- Finalize and approve design plans for improvements
- Begin construction (estimated 2020)
- Complete transportation infrastructure improvements
- Complete fiber infrastructure
- Complete fire suppression improvements
- Leverage Opportunity Zone status for rehabilitation of vacant buildings
- Attract new businesses to vacant buildings
- Rehab upper floors for residential uses
- Attract new residents

DESCRIPTION

Baltimore Street is one of the main streets for retail and restaurant establishments in Downtown Cumberland. In close proximity to Canal Place and the intersection of the GAP and C&O trails, it serves as a destination for tourists and residents alike. Baltimore Street currently houses a number of restaurants and a few retail shops, but also has a number of vacant storefronts including two large bank buildings. The street is closed to vehicular traffic and serves as a pedestrian walkway.

Existing plans for improving Baltimore Street include opening it up to one-way traffic with bike lanes while maintaining a walkable nature. The plan also includes installing fiber in order to support more high-technology office uses in some of the vacant space. These investments are also part of a plan to attract a boutique hotel to the vacant M&T building. Lastly, infrastructure enhancements will improve fire suppression capability in order to allow for upper floor residential options along the street.



FORMER MEMORIAL HOSPITAL SITE

DESCRIPTION

The Memorial Hospital opened on Memorial Avenue in 1929 and operated there until 2009 when all patients were moved to the new Western Maryland Regional Medical Center on Willowbrook Road. The City took ownership of the property and worked to Ridgecrest Investments to lease portions of the facility to multiple tenants for a few years following the hospital closing. However, all tenants were forced to vacate in 2012 as the maintenance costs of the facility became too costly for the City. In 2014, the hospital was demolished.¹

Redevelopment and planning efforts in the surrounding neighborhood have revitalized interest in developing a new plan for the current site as the City of Cumberland looks to find a new use for the property.

Support Goals:



Key Milestones & Action Items:

- Conduct a study of the site and market area to determine suitable and best use
- Develop a master plan
- Issue RFP and/or identify developer
- Finalize design plans
- Begin construction
- Complete construction
- Attract tenants/residents



¹ Cumberland Times News. "City to tenants at Memorial: Time to leave." June 15, 2012. https://www.times-news.com/news/local_news/city-to-tenants-at-memorial-time-to-leave/article_715679a0-d495-5eb4-9719-ddfbaf910dcc.html



CUMBERLAND CHASE DEVELOPMENT

Support Goals:



Key Milestones & Action Items:

- Identify developer and potential funding sources for initial 400 acres
- Develop and approve design plans
- Begin construction
- Finish construction
- Attract tenants/residents
- Evaluate potential development for remaining parcels

DESCRIPTION

The Cumberland Chase Planned Development was a planned housing development near Barton Business Park that went into foreclosure in 2010. The original project included approximately 1,250 homes on nearly 2,000 acres.

In 2014, Allegany County Department of Economic Development began to purchase some lots to prevent the property from being subdivided into multiple parcels and smaller subdivisions. After purchasing nearly 400 acres from Summit Bank, the County issued an RFP for development of the parcels along US-220 in 2018.²

The County is pursuing a potential commercial and residential housing development with some townhomes and a potential assisted living center. The proximity to Barton Business Park and a number of employers across the river in West Virginia including Northrup Grumman, IBM, and American Woodmark makes this a prime development location within the County.

² Cumberland Times News, "Former Cumberland Chase 'primed for economic development,'" November 10, 2016. https://www.times-news.com/news/local_news/former-cumberland-chase-primed-for-economic-development/article_87abbe78-26ee-5122-8239-af85f6475036.html



FORMER ALLEGANY HIGH SCHOOL SITE

DESCRIPTION

At the beginning of the 2018 school year, the new Allegany High School at the former location of the Sacred Heart Hospital opened. The site of the former facility on Sedgwick Street will no longer be used following the 2018-2019 school year with the exception of the recreational fields. The future use of the site and building will need to be established. Future ownership of the property would go to the County following the use of the facility for school purposes.³

Support Goals:



Key Milestones & Action Items:

- Conduct a study of the area to determine suitable and best use
- Issue RFP and/or identify developer
- Finalize design plans
- Begin construction
- Complete construction
- Attract tenants/residents



³ Cumberland Times News, "Future Use of former Allegany High School Unclear." July 19, 2018. https://www.times-news.com/news/local_news/future-use-of-former-allegany-high-school-unclear/article_578e54e5-9c3d-5c08-adf8-4e635877747d.html



WILLOWBROOK OUTDOOR WELLNESS SPOT

Support Goals:



Key Milestones & Action Items:

- Begin Phase I construction
- Evaluate sources of funds for further phases of project
- Finish Phase I construction
- Open facility for public use
- Secure funds for further phases
- Continue construction on facility additions until complete

DESCRIPTION

A key finding of the public survey and community engagement phase of the project was a need for additional family focused activities within the County. The Willowbrook Outdoor Wellness (WOW) Spot would create a new recreational facility in Allegany County. Located on 23 acres of unused land near the Allegany College of Maryland, the first phase of the WOW Spot would include four football and soccer fields, an ADA Outdoor Kinetics Equipment Area, a walking path, and outdoor educational institutions.

The full project has four phases of development. A grant from the Maryland Department of Natural Resources Land & Water Conservation Fund has been secured in order to begin Phase I.



AUTONOMOUS TECHNOLOGY CENTER

DESCRIPTION

On September 30, 2018, the University of Maryland Transportation Institute completed a feasibility study noting that the property around Frostburg State University would be an ideal site for an Autonomous Technology Center. Soon after the issuance of the report, Governor Hogan launched a work group to pursue the recommendations of the Transportation Institute. That work group is currently meeting with prospective users of a track.

This project allows for a regional approach to economic development and growth in this area of technology development.

An Autonomous Technology Center could attract additional businesses and investment in the County. With a growing autonomous vehicle market looking for multiple areas for vehicle testing, Allegany County could be a key place for investment.

Allegany County's unique terrain may make it a unique place for autonomous vehicle testing. Additional expertise related to cybersecurity and data analytics would help establish this facility as a key partner and leader in autonomous vehicle testing.

Support Goals:



Key Milestones & Action Items:

- Build off feasibility study findings
- Identify funding sources
- Establish local partnerships
- Work with facility users to determine site needs
- Finalize design plans
- Begin construction
- Finish construction
- Leverage facility for additional business attraction
- Identify additional support mechanisms including workforce programs, additional testing tracks, and technology development partnerships



NICKEL BUILDING

Support Goals:



Key Milestones & Action Items:

- Issue RFP/identify redeveloper
- Finalize design plans
- Begin construction/rehab
- Finish construction/rehab
- Attract tenant(s)

DESCRIPTION

The Nickel Building located in Downtown Frostburg is a historic building in need of investment and redevelopment. The building was constructed in 1887-1888 and housed the Au Petit Paris French Restaurant from 1963 until 2012 when the restaurant closed.

The City of Frostburg purchased the building in 2017 in order to ensure its historic preservation and rehabilitation. With some funding from Allegany County, basic repairs were made to the building. The City has currently issued an RFP for the purchase and redevelopment of the building, offering incentives. This project is part of the City's ongoing efforts to preserve the culture and historic assets of the Main Street in Frostburg.⁴

⁴ Cumberland Times News, "Allegany County helping Frostburg renovate Au Petit Paris," June 27, 2017. https://www.times-news.com/news/local_news/allegany-county-helping-frostburg-renovate-au-petit-paris/article_fb30e10c-235a-5cb3-a15a-379d5ab47ed4.html



THE RIVER PARK AT CANAL PLACE

DESCRIPTION

The River Park at Canal Place is a proposed whitewater park along the Potomac River in downtown Cumberland. The River Park will be constructed as an addition to Canal Place Park, a 58.1-acre historic preservation park located at the confluence of Wills Creek and the Potomac River.

The Canal Place Preservation and Development Authority recently released an RFP for the development of the Park with the goal of opening up the North Branch of the Potomac River and nearby areas for recreational uses. This key natural asset in the City of Cumberland and Allegany County has long been underutilized. By improving water quality and building connections via trails to other areas of the City, this asset will further tourism efforts within the County.

Support Goals:



Key Milestones & Action Items:

- Identify developer
- Finalize design plans
- Assess and improve water quality for recreational uses
- Begin construction/development
- Finish construction/development
- Market River Park to tourists and residents



SENIOR HOUSING DEVELOPMENT

DESCRIPTION

A development aimed at senior housing, or aging in place, would be a catalyst in the community for creating unique housing opportunities that adapt to the needs of certain demographics. Communities across the country like Allegany County are starting to see an aging population in need of new and different housing types.

Existing innovative models for developing senior housing include shared maintenance for town home or one-story homes, mixed-use development providing close access to amenities, and nearby health care facilities.

This development could evolve to be included as part of one of the other site redevelopment projects listed in this section of the report. However, a key recommendation is to include this innovative type of development within new housing construction in Allegany County.

Support Goals:



Key Milestones & Action Items:

- Identify location
- Identify potential funding resources
- Identify developer
- Finalize design plans
- Begin construction
- Finish construction
- Attract residents

M&T BANK BUILDING

DESCRIPTION

The former M&T Bank building located at 118 Baltimore Street in Cumberland is a prime location for redevelopment. The Cumberland Economic Development Corporation recently purchased the building in order to help spur this effort.

The CEDC plans to release a Request for Proposals from potential developers of the site following the initiation of the construction for the Baltimore Street improvements. A recent study completed by the Sage Policy Group examined the feasibility of a hotel at the location, indicating there is a potential for this use. However, the ultimate plan for the building will be determined following review of the submitted RFPs. The goal of this project is to ensure the building is a key anchor for the redevelopment of the Baltimore Street corridor.

Support Goals:



Key Milestones & Action Items:

- Issue Request for Proposals for developer
- Select developer
- Finalize site plans and ultimate use
- Begin construction
- Complete construction
- Open facility



MARYLAND AVENUE

DESCRIPTION

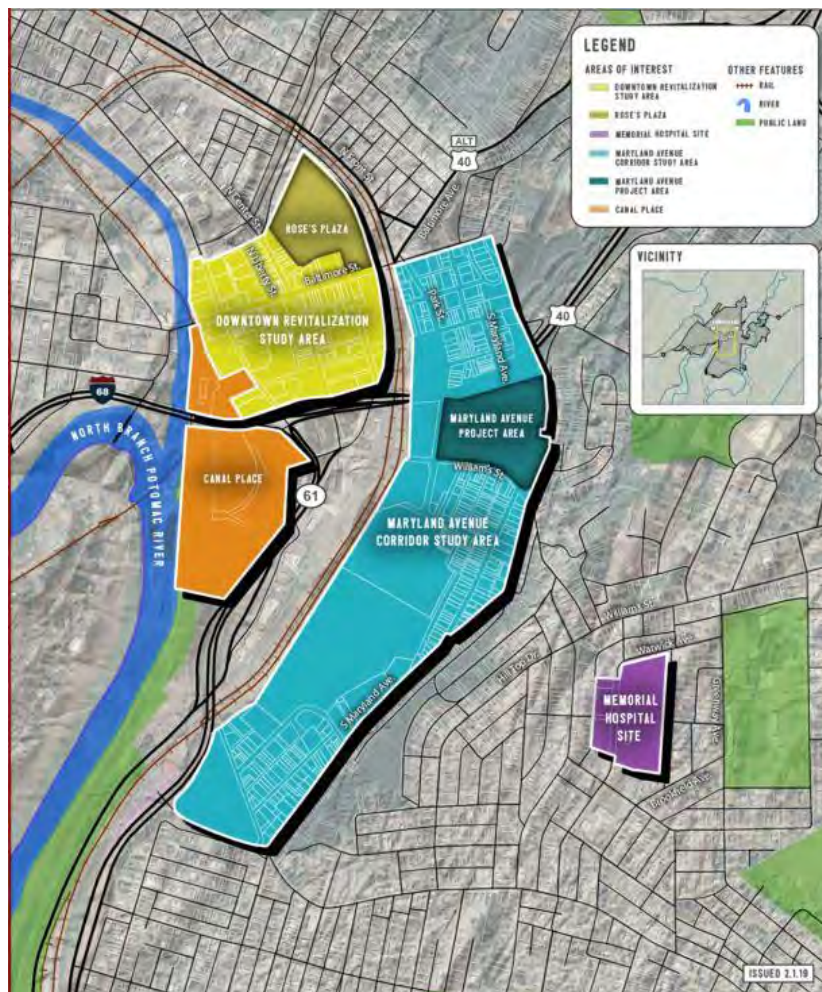
The Cumberland Economic Development Corporation is currently working with Destination by Design Planning, LLC to develop an illustrative master plan for the Maryland Avenue Corridor Study Area. This master plan effort is part of an overarching strategy to activate development in the area over the next 15-20 years. The plan will outline existing infrastructure, environmental constraints, key properties, and physical opportunities and limitations in the study area. Upon completion of the master plan, the CEDC and the City of Cumberland will have a guideline for which to spark new development in that area of the City.

Support Goals:



Key Milestones & Action Items:

- Complete Master Plan
- Identify initial list of projects to kick start development
- Coordinate development with local public and private stakeholders



CENTER STREET PROJECT

DESCRIPTION

The Center Street redevelopment project is located in the City of Frostburg. The City was recently granted funds from the Maryland Department of Housing and Community Development - Strategic Demolition Fund and the Allegany County Department of Economic and Community Development Community Enhancement Program to purchase four homes along the street. This effort is part of a plan to purchase and demolish a total of eight homes and market the land for a new mixed-use development.

The City's concept for the mixed-use development on the property would include office and flexible retail/restaurant space on the first floor with upper story office or professional housing space.

Support Goals:



Key Milestones & Action Items:

- Demolish currently purchased homes
- Secure funding for the purchase of additional homes
- Market property for development
- Identify developer, complete sale of property
- Initiate construction



Appendix A: Background Report



INTRODUCTION

The Economic Development Strategic Plan (EDSP) is being developed to put into motion a framework for economic growth and job creation with the aspiration to make Allegany County a top location for investment in the region. A critical part of this project is the Demographic, Housing, Economic, and Tourism Analysis. This background report will detail the existing conditions in Allegany County that will set a baseline understanding of the key assets and opportunities available to promote economic growth.

The Demographic Analysis details population trends, including overall historic and projected growth, as well as age, gender, race, and educational attainment.

The Housing Analysis provides an assessment of the existing housing stock, including the number of units, type, age, and value as well as market and sales information.

The Economic Analysis highlights overall employment and economic trends and provides an in-depth analysis of industry trends. This includes a breakdown of the largest and most specialized industries and growth trends over time. It also highlights important industries in Allegany County including Manufacturing and Healthcare. This section will also provide a snapshot of the top occupations in the County, the staffing patterns of major industries, and the pipeline of recent graduates. This section also includes a cluster analysis identifying the top clusters and potential supply chain gaps that could be used to identify target industries for attraction. Lastly, an in-depth analysis of the retail sector highlights opportunities for growth.

The Tourism Analysis will provide a summary of tourism trends in the United States and within Allegany County, identifying existing assets, opportunities for growth, and examining case studies.

This background report will serve as the foundation for the remaining stages of the strategic planning process, which will build upon the knowledge gathered to engage with the community on the County's overall vision for growth.

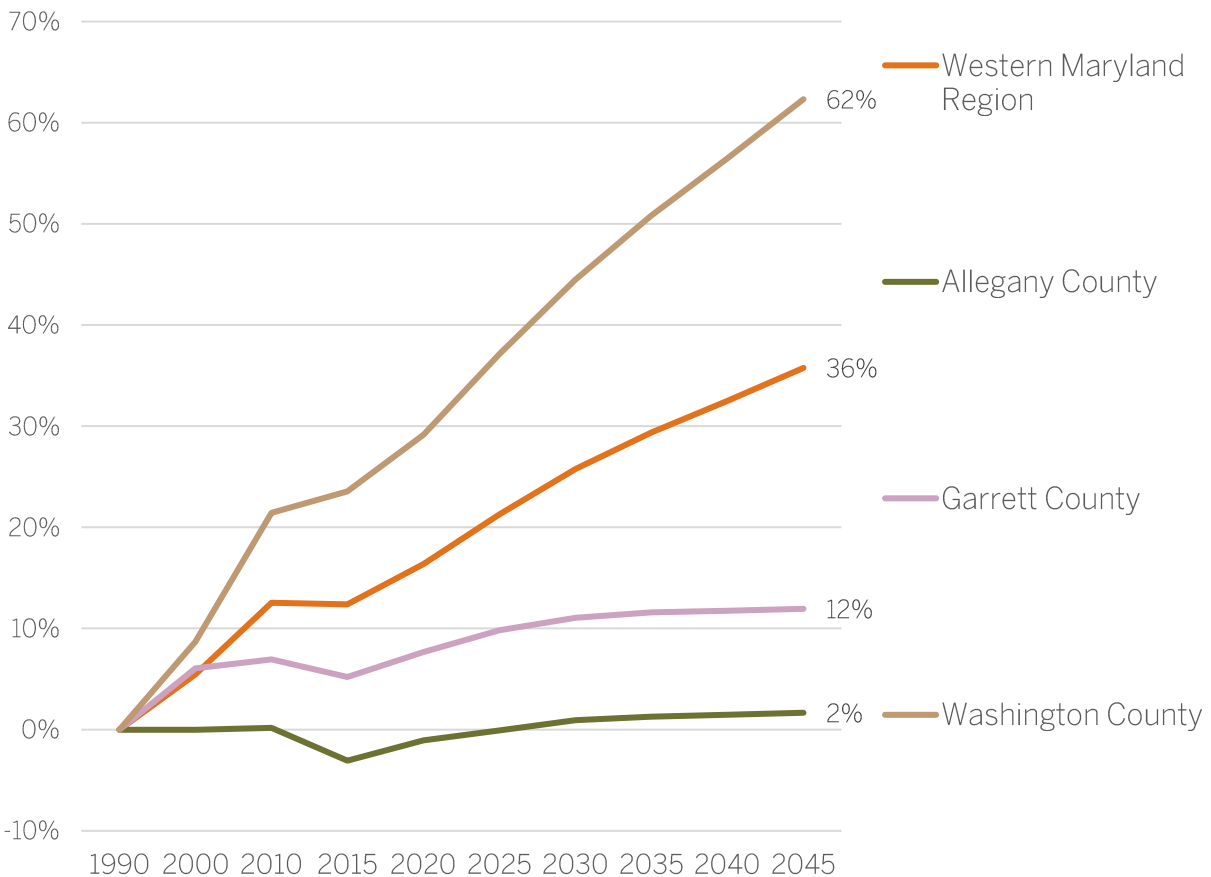


DEMOGRAPHIC ANALYSIS

POPULATION

Since 1970, Allegany County has struggled with a declining population, with the number of residents falling by 14% between 1970 and 2015, losing 11,394 people. Over that same period, the neighboring counties of Garrett and Washington grew by 38% and 44% respectively. State projections show that Allegany County’s negative population trend may reverse in the future with estimates forecasting an increase to 76,200 residents by 2045, a growth of 5% between 2015 and 2045, but still a 9% decrease from 1970. By 2045, Western Maryland Region projected to have nearly doubled its population of 1970 with 304,750 total residents, with 76,200 residents in Allegany County, 31,500 residents in Garrett County, and 197,050 residents in Washington County.¹

Population Growth and Projections in Western Maryland, 1990-2045



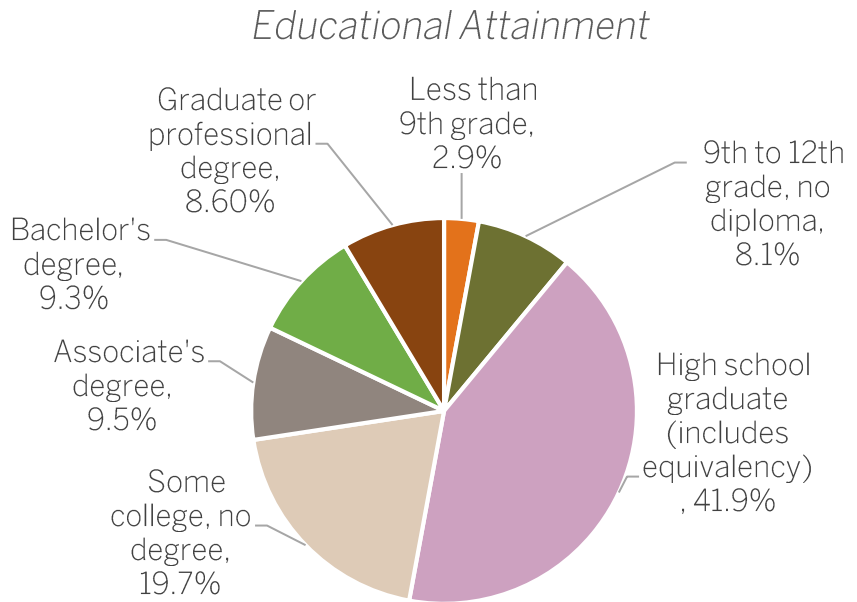
Source: Maryland State Data Center

¹ Maryland State Data Center.

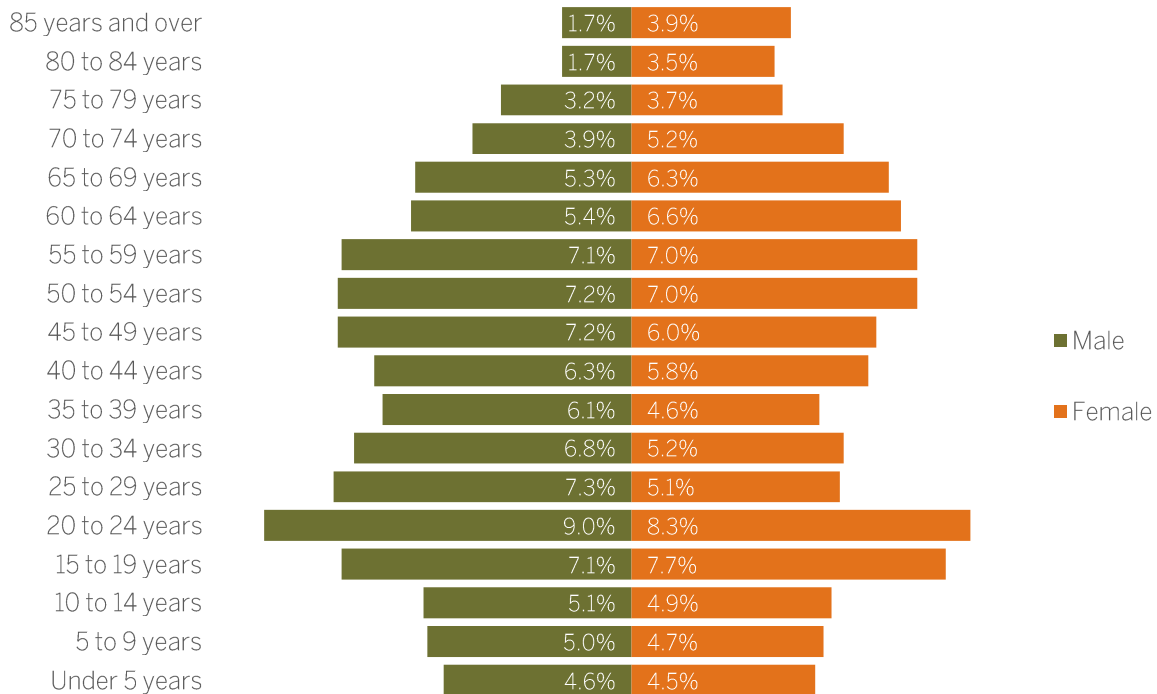


EDUCATIONAL ATTAINMENT

The share of Allegany residents having obtained a bachelor's degree (9.3%) is nearly half the national average (18.8%) and less than half the share of Marylanders having obtained a bachelor's degree (20.7%). The largest category of Allegany residents is high school graduates, accounting for 41.9% of the total population. Despite a lower achievement of bachelor's degrees, 89% of the



Population Pyramid



Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.



population has a high school diploma or more.²

POPULATION PYRAMID

The largest age cohort in Allegany County is individuals between the ages of 20-24 years old. This is followed by a large population of individuals between the ages of 14-20 and 45-60 years old. Most notably there are relatively few adults between the ages of 24 and 44 years old. This may have implications in terms of Allegany's overall workforce – both in terms of individuals early on in their careers and as a shortage of individuals in the middle or later stages of careers.³

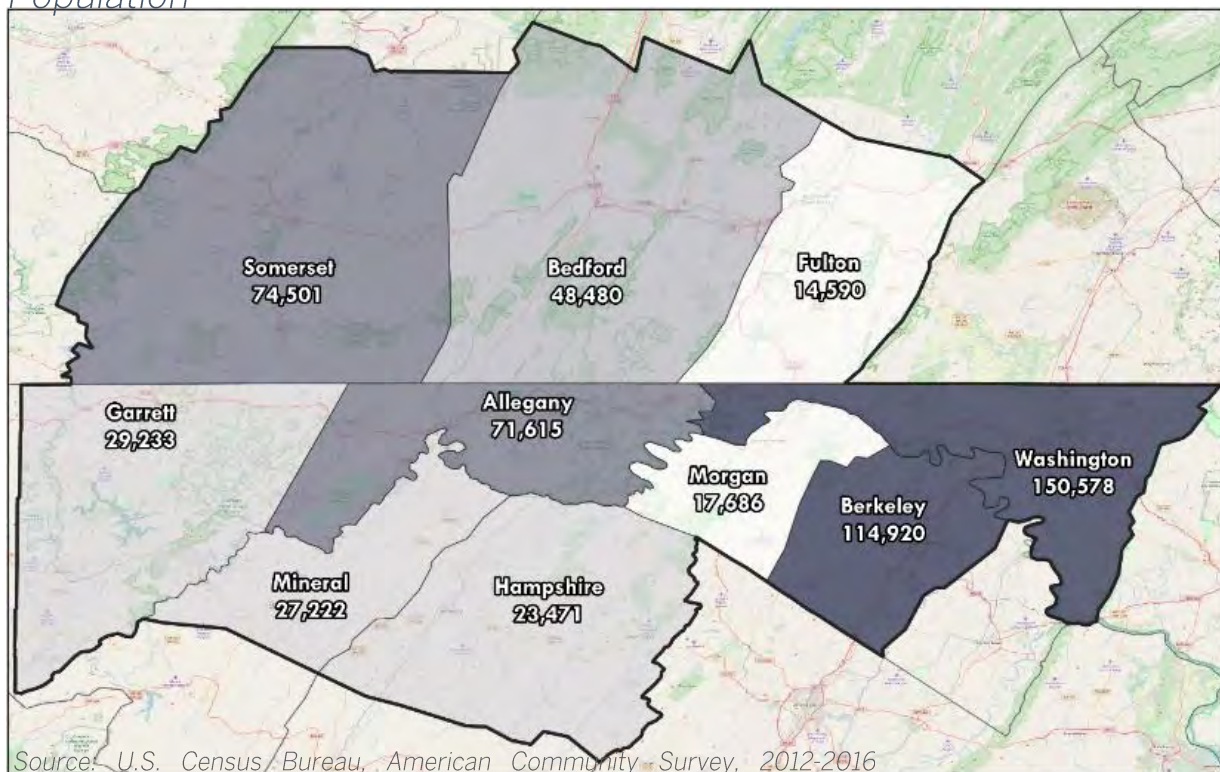
RACE

Allegany County is a very homogenous region, with 89% of the population identifying as White Alone. This is higher than both the national average and Maryland, which are 73% and 57% respectively. The next largest demographic group identifies as Black or African American alone (8%). The remaining 3% of residents are Asian alone (1%) or two or more races (2%).⁴

REGIONAL COMPARISON

In order to understand Allegany County's position in a regional context, a comparison of the County to others in the broader Allegany County Region was conducted. This region is comprised of Somerset, Bedford, and Fulton Counties in Pennsylvania; Mineral, Hampshire, Morgan, and Berkeley Counties in West Virginia; and Garrett and Washington Counties in Maryland.

Population



² U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.

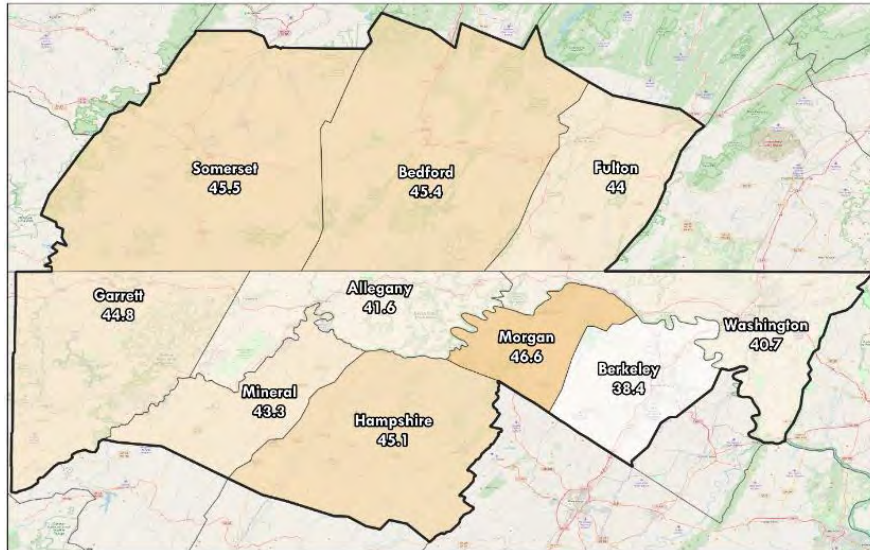
³ U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.

⁴ Ibid



Allegheny County falls within the mid-range in total population. The most populous counties, Washington and Berkeley Counties lie to the east, geographically closer to the Washington–Baltimore–Arlington, DC–MD–VA–WV–PA Combined Statistical Area.

Median Age

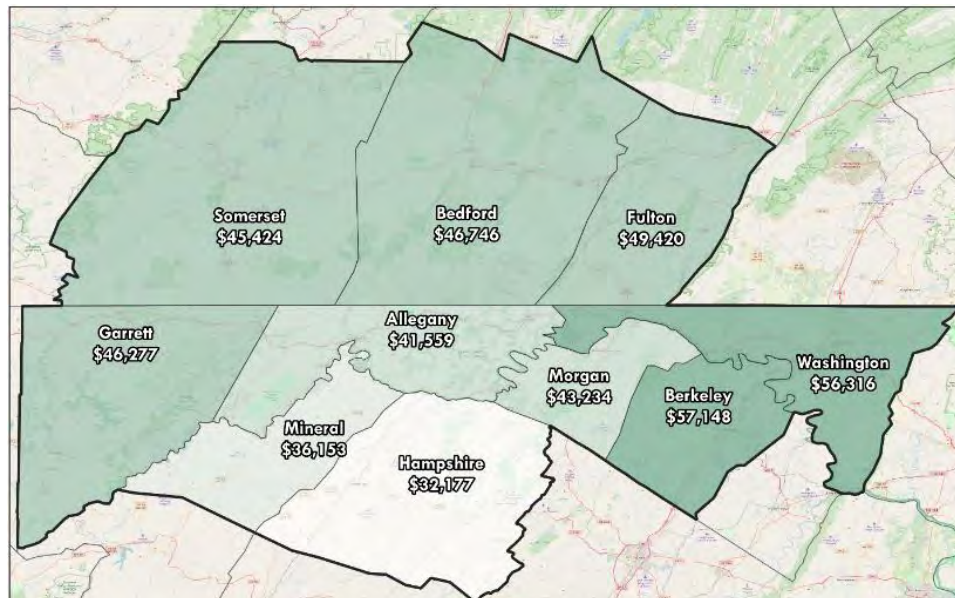


Additionally, Allegheny County’s median age, and median household income fall within the mid-range for the larger region. Although the County’s median age of 41.6 is higher than the national average of 37.7, it is lower than most of the counties in the region, except the easternmost counties of Washington and Berkeley.

Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.

Median Household Income

The median household income in Allegheny County is lower than all of the other counties in the region in Maryland and Pennsylvania. However, it is significantly higher than the Mineral and Hampshire Counties in West Virginia, which are the only two counties with a median household income less than \$40,000. Allegheny’s median household income of \$41,559 is significantly lower than the median for Maryland of \$76,067. However, West Virginia’s median household income is only \$42,644. Berkeley and Washington Counties to the east have the highest median household incomes and the only ones higher than \$50,000.



Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.

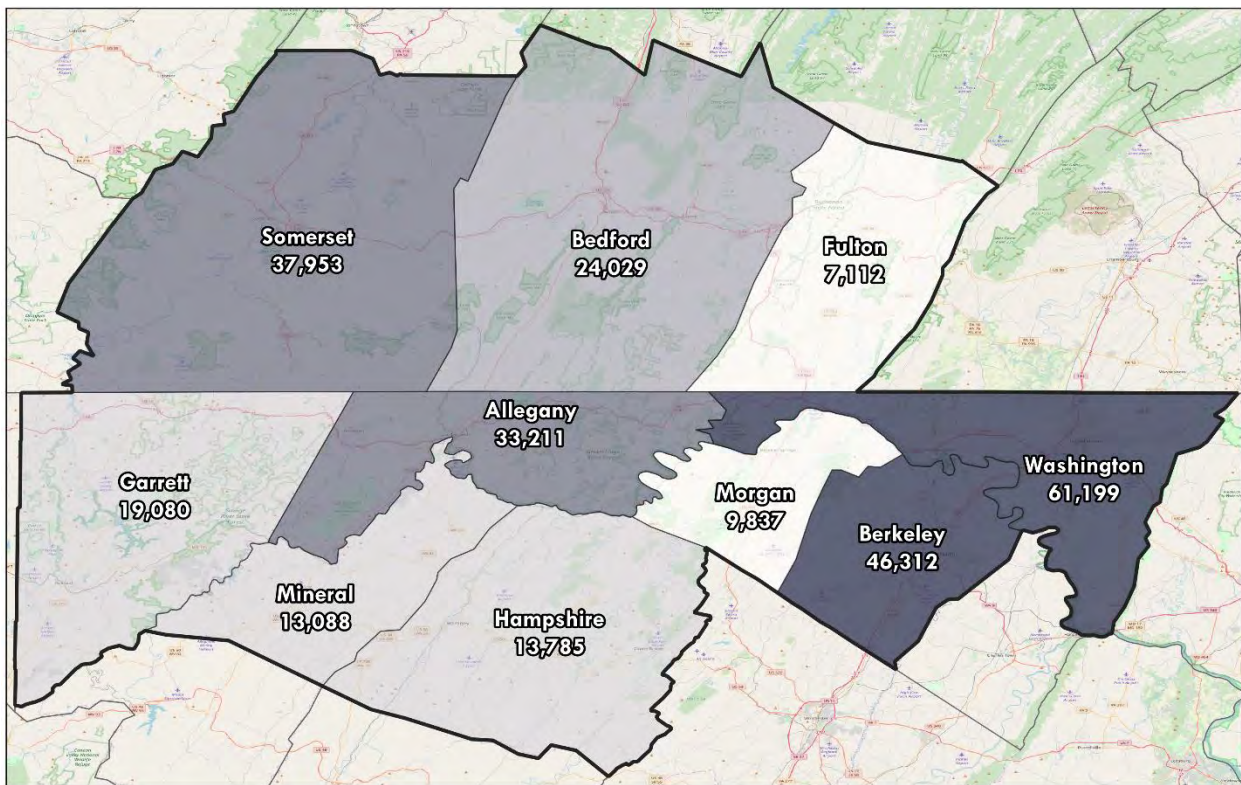


HOUSING ANALYSIS

OVERVIEW

Allegheny County has a total of 33,211 housing units, nearly half as many as nearby Washington County, Maryland and over three times as many as Morgan County, West Virginia. Compared to other counties in the region, Allegheny has the fourth most behind Washington, Berkeley, and Somerset County, Pennsylvania. Washington and Berkeley have higher a higher housing density. The larger number of units in Somerset is primarily due to the County's larger size. Fulton County, Pennsylvania has the least units at 7,112, just a fraction of Washington County's 61,199 units.

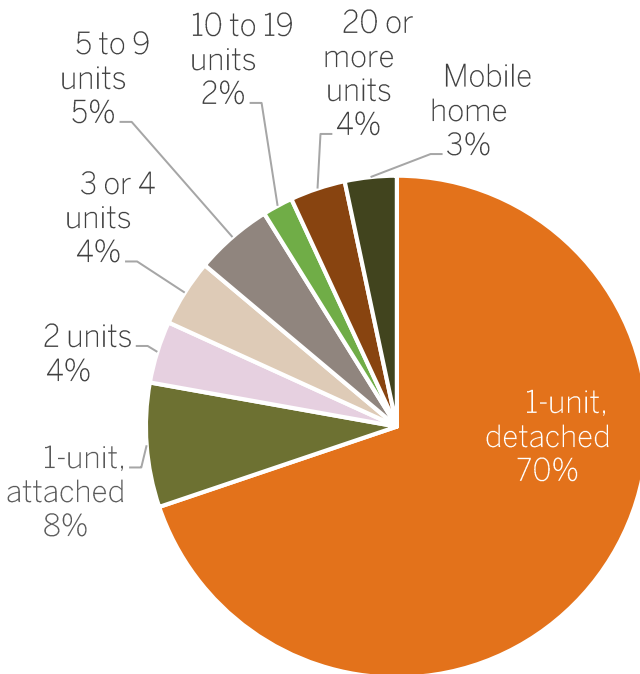
Housing Units



Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.



Units in Structure



Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.

Of the 33,211 units recorded in Allegany County, 70% of them are single unit detached homes. This is compared to 52% of homes in Maryland and 62% in the US.

An additional 8% are single-unit attached homes, a higher percentage than the US (6%) but a smaller percentage than Maryland (21%).

The County has a significantly lower percentage of units in structures with 20 or more units (4%) than the national and state rates (both 9%).

Allegany County has a higher number of owner-occupied units than both the national and Maryland averages.

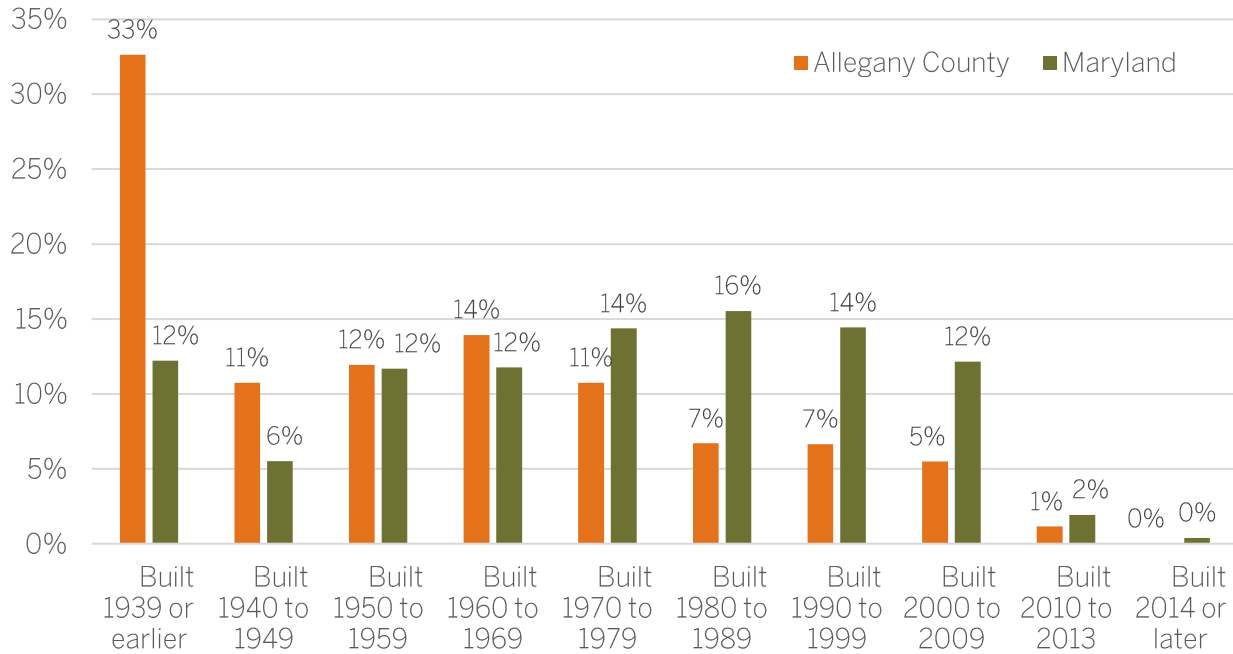
Owner-occupied units represent 68.4% of the units in Allegany County, only slightly higher than the 66.5% in Maryland and 63.6% in the United States.

	OWNER OCCUPIED	RENTER OCCUPIED
UNITED STATES	63.6%	36.4%
MARYLAND	66.5%	33.5%
ALLEGANY COUNTY	68.4%	31.6%

Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.



Year Structure Built

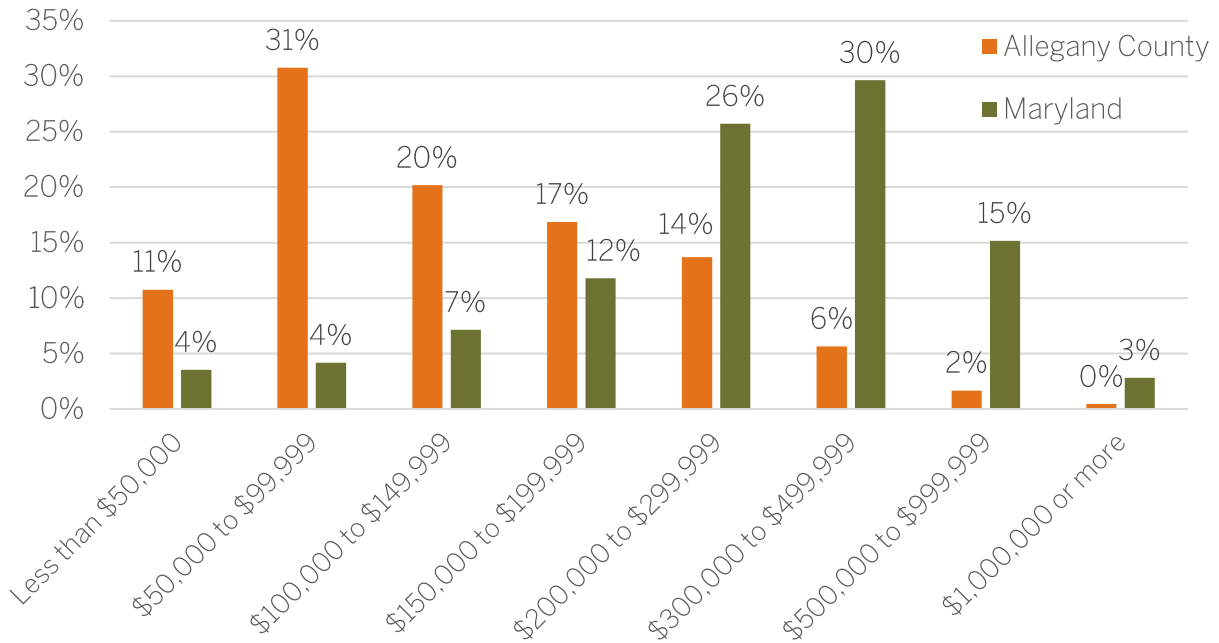


Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.

A larger disparity emerges when comparing the age of housing stock in Allegany County to that in the entire state. In Allegany County, 33% of all houses were constructed prior to 1940, which is nearly triple the percentage of those in Maryland. It is clear that the housing stock in Allegany is significantly older than the rest of the state, with less than 15% of the homes being built since 1990. The median year of structure built for homes in Allegany County is 1956 compared to 1976 for Maryland and 1977 for the US overall. It is the lowest of all counties within the Allegany County region, with the closest being Somerset County in Pennsylvania at 1963 and the highest being Berkeley at 1994. In Allegany County, 42% of owner-occupied homes are valued at less than \$100,000 compared to only 8% in Maryland overall. Alternatively, only 8% of units are valued over \$300,000 in the County compared to 48% in Maryland.

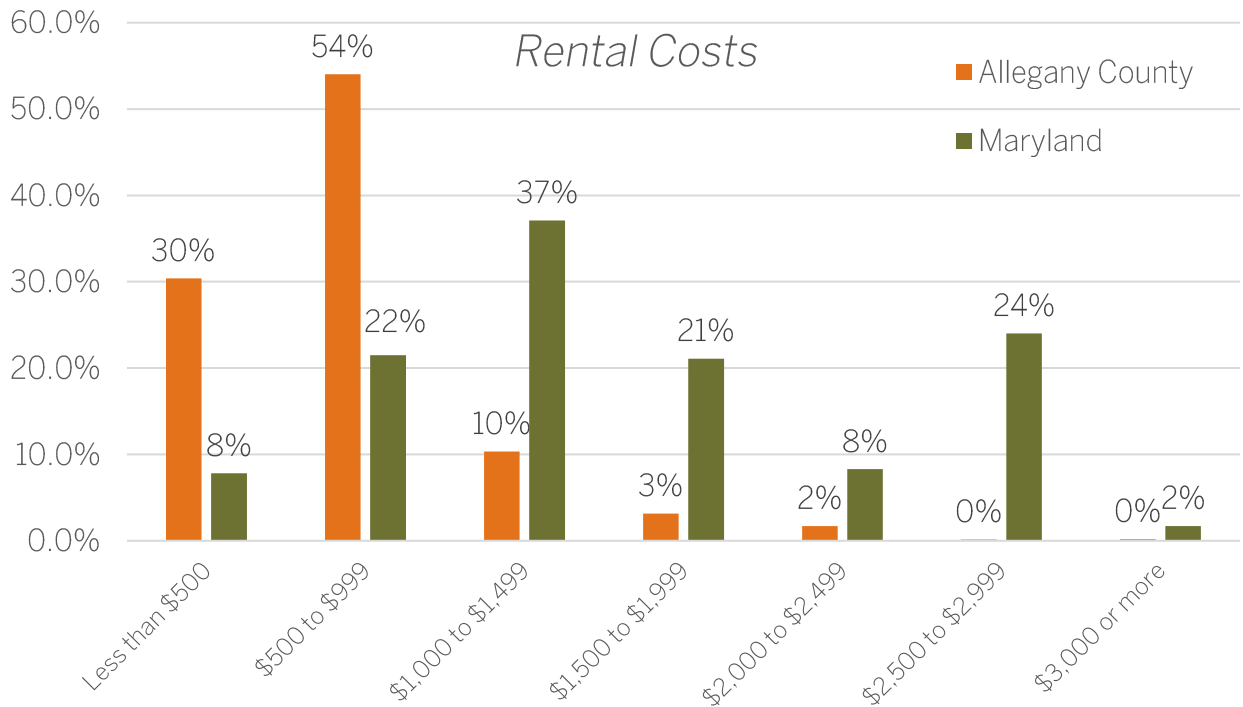


Housing Value (Owner-Occupied Units)



Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.

Rental Costs



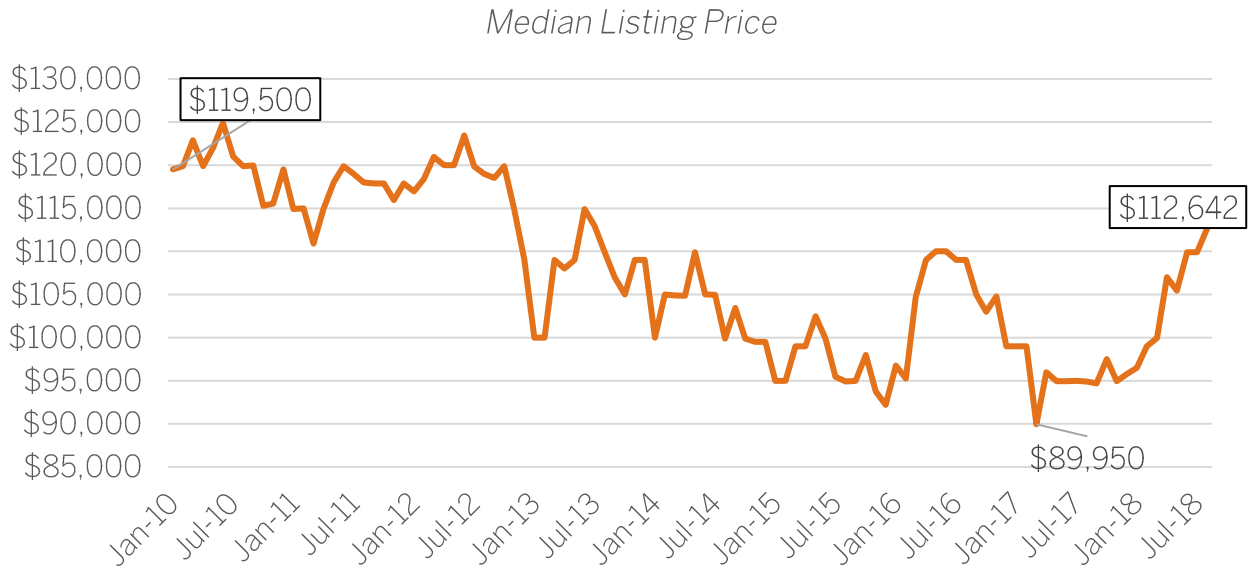
Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.

Rental units costing less than \$1,000 make up 84.4% of the units in Allegany County compared to only 29.3% in the state. Alternatively, only 0.4% of units in Allegany County cost more than \$2,500 compared to 25.7% in Maryland.



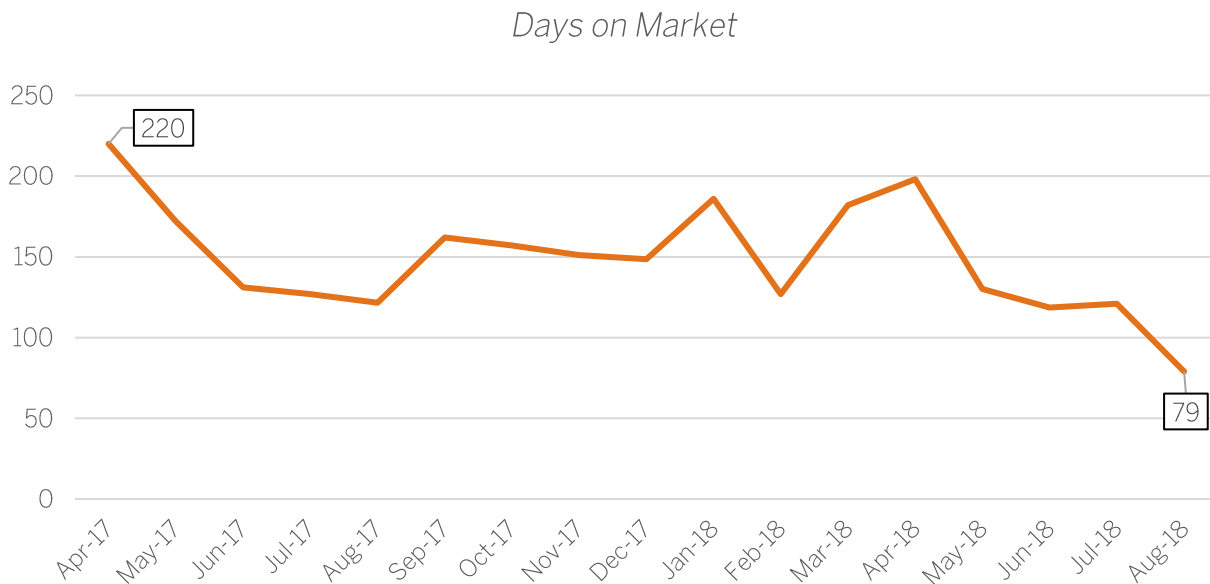
HOUSING MARKET INFORMATION

The median listing price of homes in Allegany County has trended up since March 2017 when it hit its lowest level (\$89,950) since January 2010. Since then, the median listing price has grown 25% to its current level of \$112,652. However, the price is still 5% below its January 2010 level of \$119,500.



Source: Data acquired from Zillow.com on 11/1/2018.

The median number of days on market has decreased since April 2017 from 220 days to only 79, a fall of 64%.

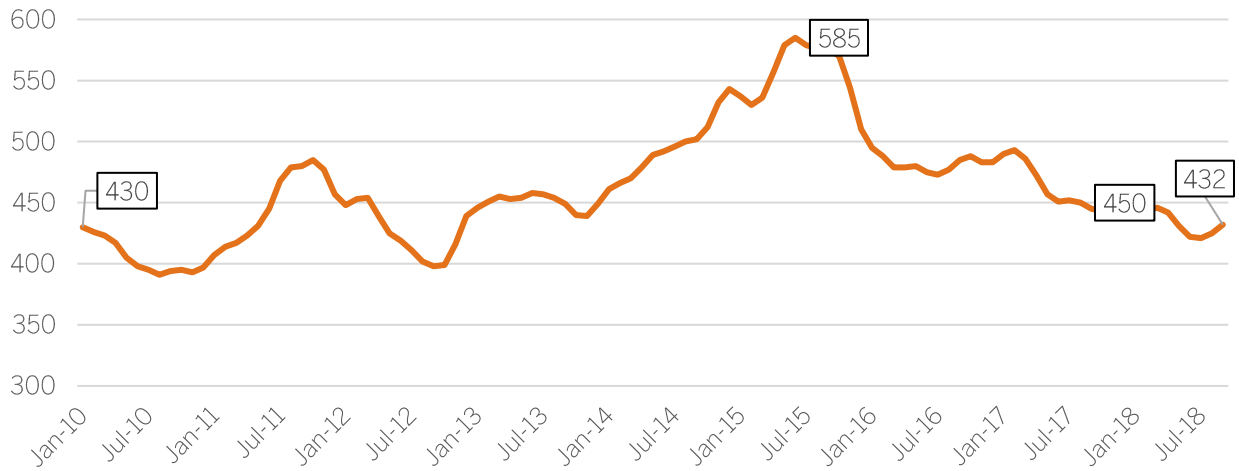


Source: Data acquired from Zillow.com on 11/1/2018.



The inventory measure below shows the seasonally adjusted median weekly inventory of for-sale homes for each month from January 2010 to September 2018. The inventory in September of 2018 is only 2 units higher than that of January 2010. However, there was a significant increase between September 2012 and June of 2015, where there was a high 485. Since then, the inventory has steadily decreased to its current level.

*Inventory Measure of For-Sale Units
(Seasonally Adjusted)*



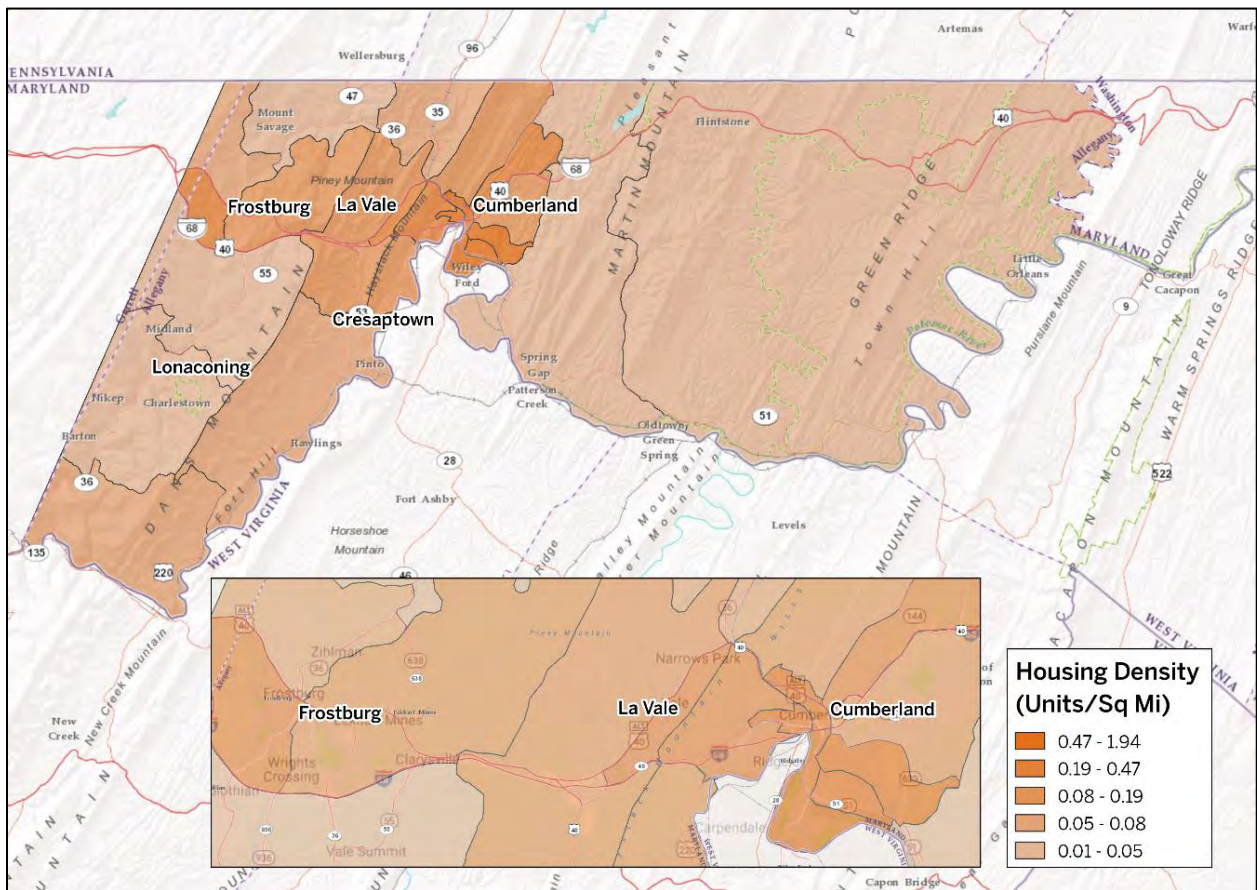
Source: Data acquired from Zillow.com on 11/1/2018.



MAJOR NEIGHBORHOODS

In order to better understand housing issues across the County, the total concentration of housing units and median home value has been mapped by census tract below. The areas with the highest density of housing within Allegany County are centered primarily around the cities of Frostburg and Cumberland. The large census tract to the east has a low housing density, likely due to the topography which includes Green Ridge and Rocky Gap State Park. Other areas of low density include the area to the southwest near Lonaconing and the far northwest corner of the County. The portion of southwest Allegany County that runs along Hwy-220 south of Cresaptown has a somewhat low level of density and may be an area for the construction of additional housing given the proximity to IBM and Barton Business Park.

Housing Density by Census Tract

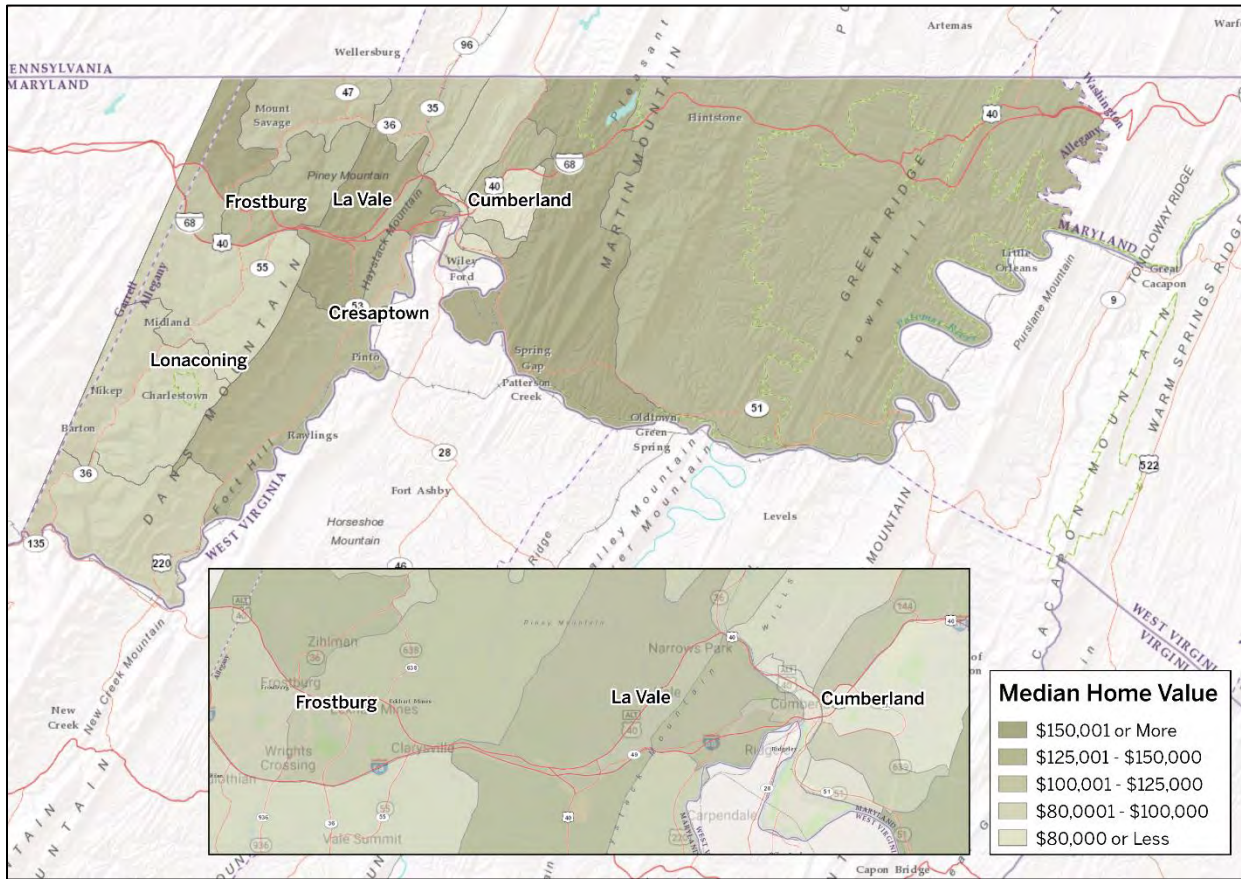


Source: U.S. Census Bureau, American Community Survey, 2013-2017 Estimates.



In general, the housing stock in the western portion of Allegany County has a lower median value. In particular, the area to the southwest has a low median home value as do areas near the City of Cumberland. Census tracts with the highest median home value include the eastern portion of the County, particularly in the area running north and south including Rocky Gap State Park, the area between Cumberland and Frostburg where La Vale is located, and the census tract covering the northwesternmost portion of the County to the northwest of Frostburg. The low value of homes around Cumberland along with its higher density may be indicative of low-quality older homes.

Median Home Value by Census Tract



Source: U.S. Census Bureau, American Community Survey, 2013-2017 Estimates.

Overall, it is evident that certain areas within Allegany County have a higher concentration of homes of higher value than others. Areas to the east of the City of Cumberland have low-density, higher-value homes. The City of Cumberland has the highest density of low-value homes, while areas around Frostburg and Cresaptown have medium density, higher value homes.



HOUSING IN CUMBERLAND AND FROSTBURG

The following analysis looks more closely at housing in the cities of Cumberland and Frostburg to provide additional context around housing in key areas of the County. Between the two cities, Cumberland has roughly three times the number of units as Frostburg, a total of 10,692. Approximately 50% of units in both cities are single-unit detached homes, with a high rate of single-unit attached homes. In total, 68.7% of housing units in Cumberland, and 59.2% of housing units in Frostburg are single-unit homes. Frostburg has a higher share of small and medium sized apartment buildings (3-9 units). A total of 22.7% of Frostburg's 3,541 units are part of three to nine-unit structure. Frostburg has a higher rate of renter occupied units, likely due to the student population from Frostburg State University. Approximately 58% of units in Frostburg are renter occupied, while only 48% of units in Cumberland are renter occupied.

Housing Units by Type in Cumberland and Frostburg

Number of Units in Structure by Percentage	Cumberland	Frostburg
1-unit, detached	55.5%	48.2%
1-unit, attached	13.2%	11.0%
2 units	6.9%	7.2%
3 or 4 units	6.7%	12.6%
5 to 9 units	8.6%	10.1%
10 to 19 units	1.9%	3.9%
20 or more units	7.1%	6.8%
Mobile home	0.1%	0.3%
Total Housing Units	10,692	3,541

Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.

Occupancy Status of Housing Units in Cumberland and Frostburg

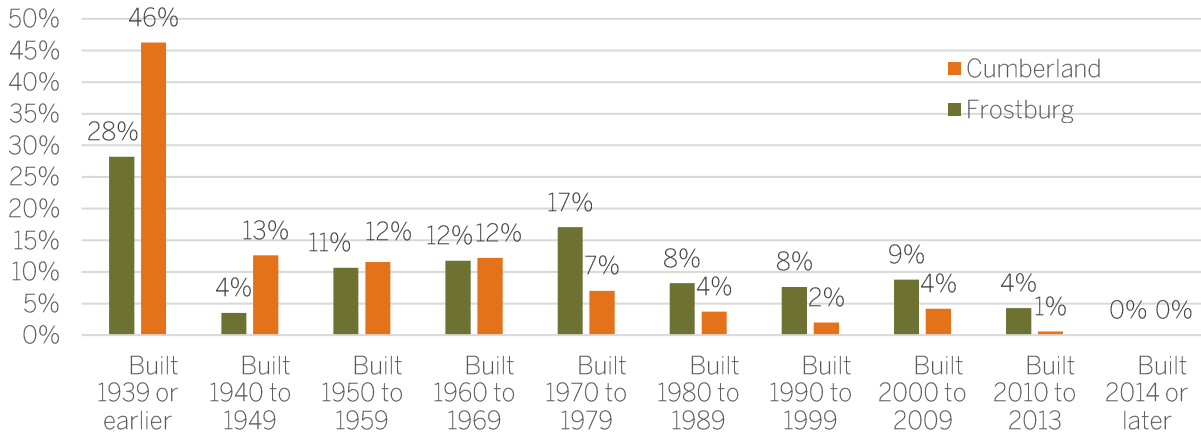
Occupancy Status	Cumberland	Frostburg
Owner-occupied	52%	42%
Renter-occupied	48%	58%

Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.



While both cities have an old housing stock, Cumberland's housing is significantly older with 46% of homes being built before 1940. Less than 5% of housing stock in both cities has been built since 2010.

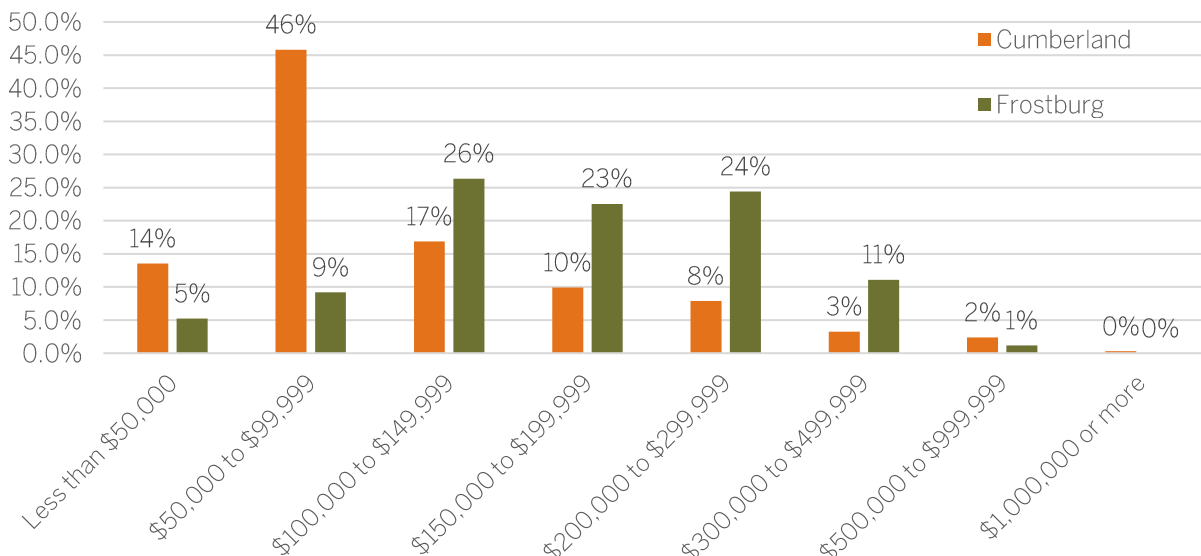
Year Structure Built



Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.

The aged housing stock in Cumberland is likely negatively impacting home values as over 50% of owner-occupied homes in Cumberland are valued at less than \$100,000. The lack of high-value housing stock is consistent with the low median home values in the census tracts surrounding the City of Cumberland. Frostburg has a more diverse housing stock in terms of home value, with most homes falling between \$100,000 and \$500,000. The lack of low-value homes may create a shortage of affordable homes suitable for young professionals, first-time homebuyers, or lower-income residents of the County.

Home Value (Owner-Occupied Units)



Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.



HOUSEHOLDS

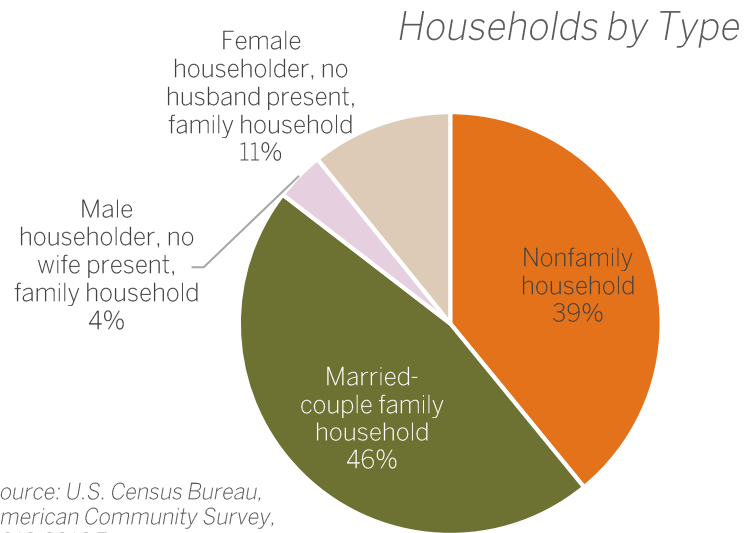
The most common household type in Allegany County is Married-couple family households. In total, 46% of households in Allegany County are of this type, compared to 48% of households for both Maryland and the US. Allegany County has a higher percentage of Nonfamily households, 39%, than Maryland, 34%, and the US, 33%.

The median family size in Allegany County is 2.32 smaller than the median family size in Maryland, 2.67, and the US, 2.64.

In Allegany County, only 25.1% of households have someone under the age of 18 compared to 33% for Maryland and 32.0% for the US.⁵

As shown in the chart below, Allegany County has a much higher percentages of households making less than \$50,000 than Maryland or the US. While only 32.5% of households in Maryland and 45.4% in the US make less than \$50,000, a total of 57.9% of households in Allegany County make less that amount. Only 13.7% of Allegany County households make over \$100,000, compared to much higher percentages in Maryland, 37.3% and the US, 24.6%.

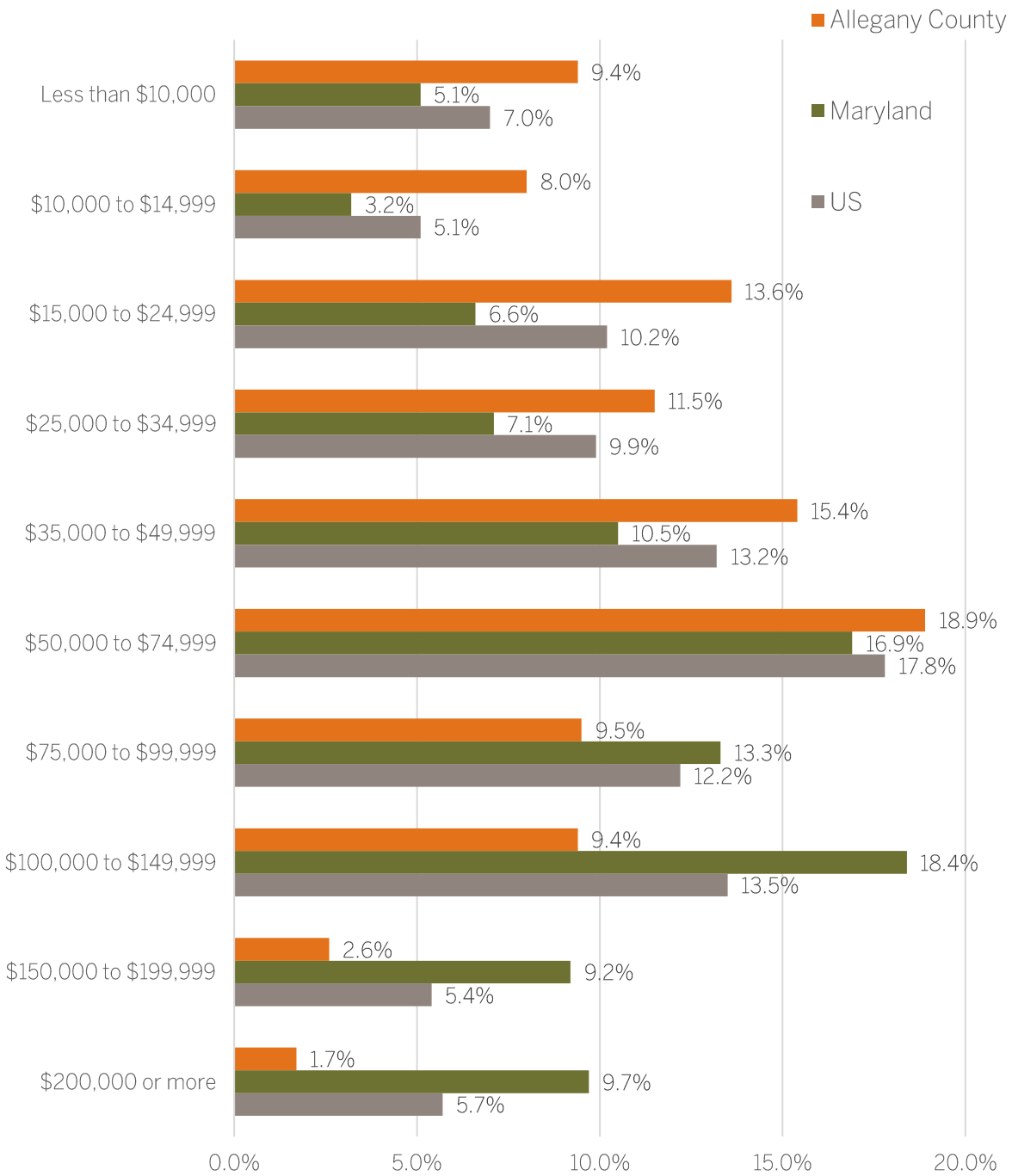
Based on the above analysis, smaller, more affordable houses are needed in Allegany County than in the rest of the state. The previous analysis showed that housing in the County is in general lower priced than other areas of the state. However, ensuring that there is quality affordable housing, of smaller types, should be a priority.



⁵ Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.



Household Income Distribution



Source: U.S. Census Bureau, American Community Survey, 2012-2016 Estimates.



ECONOMIC ANALYSIS

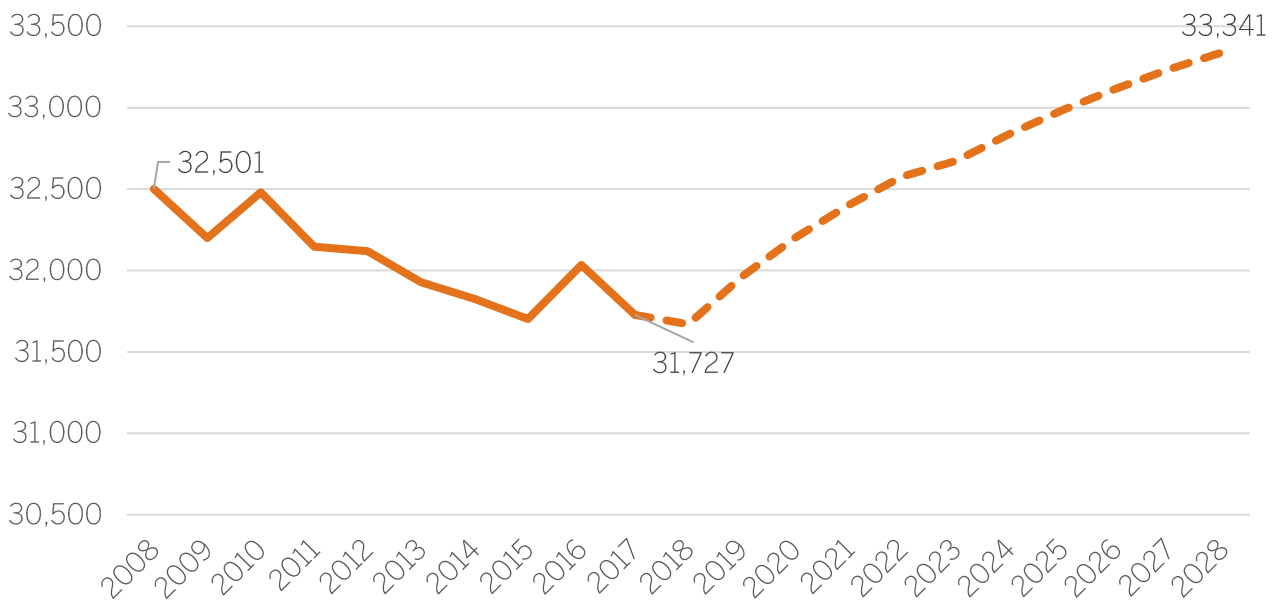
OVERALL ECONOMIC TRENDS

The total number of jobs in Allegany County has declined since 2008. Despite downward trends leading up to 2018, the total number of jobs is projected to increase to 33,341 by 2028.⁶

Allegany County has lost more than 500 jobs in three industries between 2001-2017: Department Stores (891), Pulp, Paper, and Paperboard Mills (524), Local Government, Excluding Education and Hospitals (504). During the same time period, the County has gained more than 500 jobs in two industries: State Government, Excluding Education and Hospitals (526), and Household and Institutional Furniture and Kitchen Cabinet Manufacturing (500).

Despite the overall decline in jobs, projections estimate modest growth by 2023. Given the disparity between large industries in Allegany County, this growth is likely to be concentrated in a few sectors and potentially even a few business locations. The overall projected growth between 2018 and 2028 is based on potential growth in Health Care and Social Assistance (479 jobs); Professional, Scientific, and Technical Services (404 jobs); and Administration and Support and Waste Management and Remediation Services (277 jobs),

Employment in Allegany County



Source: Economic Modeling Specialists International, 2018.3 ; 2019.1

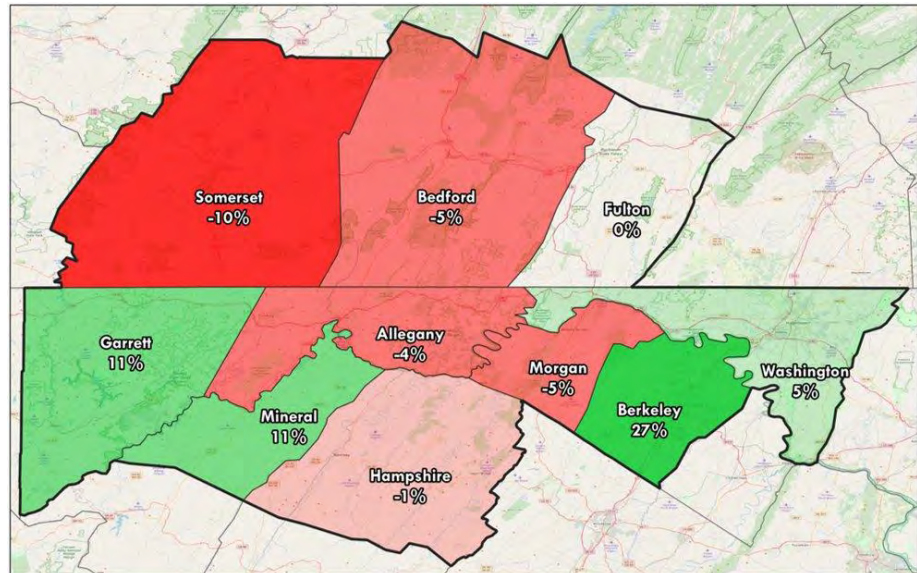
⁶ Industry data is from Economic Modeling Specialists International, 2018.3 except where otherwise noted. Data for employment projections is from Economic Modeling Specialists International, 2019.1, which revised down initial employment projections for 2028 by 2,121 jobs. Economic Modeling Specialists International (Emsi) projections are based on state and regional employment projections from the U.S. Bureau of Labor Statistics and the Maryland Department of Labor, Licensing, and Regulation. In order to estimate County level projections, Emsi uses data on historical trends to then model regional projections to the local level.



REGIONAL EMPLOYMENT COMPARISON

The Allegheny County Region shows disparity between individual counties within the region. While Allegheny County has lost jobs, job loss in other counties has been more dramatic. Between 2001-2017 the total number of jobs in Allegheny County declined by 4%. Changes in the overall region ranged from -10% in Somerset County and 27% growth in Berkeley County. Rates of

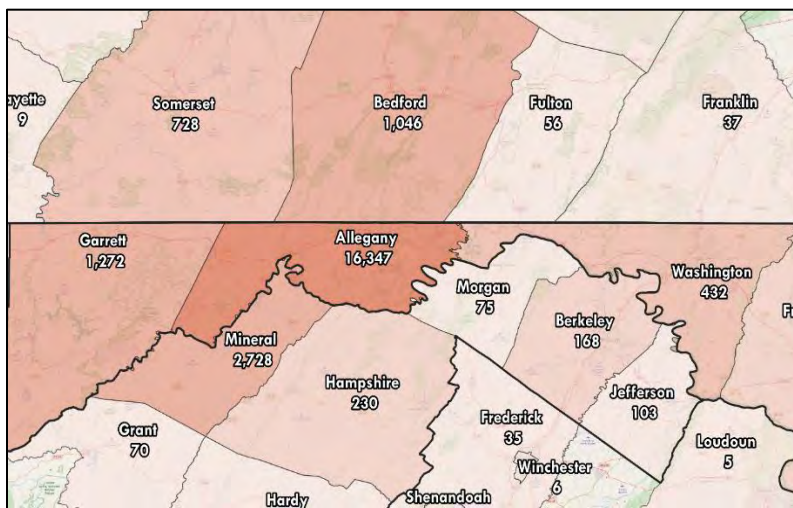
Percentage Employment Change 2001-2017



Source: Economic Modeling Specialists International, 2018.3

decline range from just 2% for Personal Care Services to a total loss of all jobs in 12 industries. Maryland Department of Labor, Licensing, and Registration identifies a large decline in manufacturing specifically for Allegheny County in the years between 1979-2009. Among the dozen industries where all jobs have been lost since 2001, seven are in the manufacturing sector, three of which represent a loss of more than 200 jobs.

Where Workers in Allegheny County Live



Allegheny County from elsewhere in the region to work. There are 8,336 Allegheny County residents that leave the County on a daily basis for work elsewhere.

COMMUTING PATTERNS

A large portion of Allegheny workers also live within the County. A large portion of workers commute into Allegheny County on a daily basis, most notably from Garrett County in Maryland, Mineral County in West Virginia, and Bedford County in Pennsylvania. In total there are 16,347 individuals both living and working in Allegheny County on a daily basis. In addition to these workers, another 9,540 commute to



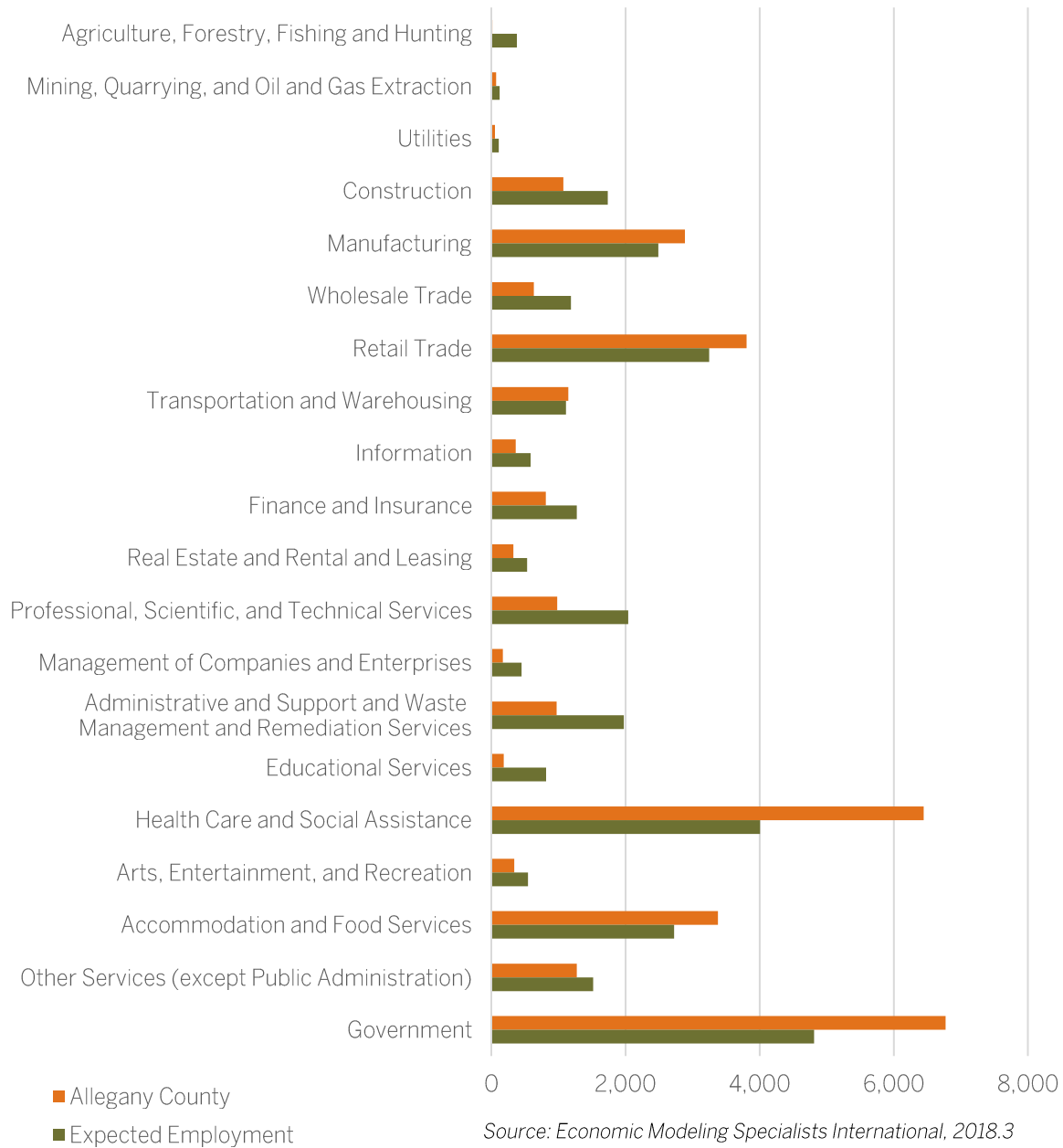
INDUSTRY SECTOR PROFILE

There are approximately 31,727 total jobs in Allegany County, MD (Emsi, 2018). Three sectors account for nearly 43% of all jobs in Allegany County: Retail Trade (12%), Health Care and Social Assistance (20.32%) and Accommodation and Food Services (10.64%). Within these, the two largest industries by share of total jobs are Restaurants and Eating Places and General Medical and Surgical Hospitals. Together these two industries account for nearly 15% of all jobs in Allegany county and 121 business locations. Both industries have experienced modest growth since 2001, but alone do not account for the most significant changes in Allegany County.

Health Care and Social Assistance and Government are the two strongest industry sectors in Allegany County based on overall employment concentration. There are 1.6 times the number of employees in the Healthcare and Social Assistance than would be expected of a county of similar size based on national trends and 1.4 times the expected employment in Government. The high share of employees in these two industries means that other industries represent a smaller share of jobs in Allegany County than would be expected based on national trends. Specifically, there is lower than expected employment in Agriculture, Forestry, Fishing and Hunting (1.20% expected), Educational Services (2.58% expected), Management of Companies and Enterprises (1.42% expected), Professional, Scientific, and Technical Services (6.43% expected), and Administrative and Support and Waste Management and Remediation Services (6.22% expected).



Expected vs Actual Employment in Allegany County



Industry Sectors in Allegany County

Description	Jobs	Share of Jobs	Average Earnings	Businesses
Agriculture, Forestry, Fishing and Hunting	17	0.05%	\$22,979	4
Mining, Quarrying, and Oil and Gas Extraction	71	0.22%	\$76,449	5
Utilities	56	0.18%	\$112,631	2
Construction	1,074	3.38%	\$51,598	118
Manufacturing	2,885	9.09%	\$56,714	55
Wholesale Trade	635	2.00%	\$42,168	49
Retail Trade	3,807	12.00%	\$30,076	259
Transportation and Warehousing	1,148	3.62%	\$64,732	69
Information	364	1.15%	\$46,732	15
Finance and Insurance	811	2.56%	\$57,880	97
Real Estate and Rental and Leasing	328	1.03%	\$42,572	53
Professional, Scientific, and Technical Services	985	3.10%	\$40,806	100
Management of Companies and Enterprises	171	0.54%	\$63,198	6
Administrative and Support and Waste Management and Remediation Services	975	3.07%	\$33,033	63
Educational Services	183	0.58%	\$32,316	9
Health Care and Social Assistance	6,448	20.32%	\$55,207	251
Arts, Entertainment, and Recreation	343	1.08%	\$15,646	22
Accommodation and Food Services	3,377	10.64%	\$19,193	167
Other Services (except Public Administration)	1,277	4.02%	\$24,190	158
Government	6,772	21.35%	\$62,942	83
Total	31,727		\$47,188	1,585



LARGEST INDUSTRIES

Based on employment, the five largest four-digit industries are: Restaurants and Other Eating Places, General Medical and Surgical Hospitals, Education and Hospitals (Local Government), State Government, Excluding Education and Hospitals, and Education and Hospitals (State Government). The top two industries have experienced modest growth in the years between 2012-2017. The remaining three industries have seen contraction in jobs, and most notably State Government, Excluding Education and Hospitals has lost 18% of jobs since 2012. Together these five industries represent 30.7% of all jobs in Allegany County for 2017.

Largest Industry Sectors in Allegany County

Description	2017 Jobs	2012 - 2017 % Change	Avg. Earnings Per Job
Restaurants and Other Eating Places	2,425	5%	\$16,673
General Medical and Surgical Hospitals	2,259	2%	\$70,704
Education and Hospitals (Local Government)	2,052	-9%	\$60,208
State Government, Excluding Education and Hospitals	1,588	-18%	\$70,237
Education and Hospitals (State Government)	1,447	-5%	\$55,644

MOST SPECIALIZED INDUSTRIES

An industry's Location Quotient (LQ) is a measure of concentration within a given geographic boundary in comparison to the rest of the US. A LQ of one (1) signifies that a particular industry is equally as concentrated in the area as the rest of the US. A LQ higher than one (1) would indicate that an industry is more concentrated in a particular area than would be expected at the national level, thus representing a potential opportunity or risk for the local economy.

In addition to, the total number of jobs, the concentration of particular industries in Allegany County in comparison to national averages highlights which industries are most unique to the County and represent assets, opportunities, and potential weaknesses to address. The most unique industry in Allegany County is Other Furniture Related Product Manufacturing, which is nearly 105 times more concentrated in Allegany County than expected.



Most Specialized Industries

Description	2017 Location Quotient	2012 - 2017 % Change	Avg. Earnings Per Job
Other Furniture Related Product Manufacturing	104.95	25%	\$45,550
Pulp, Paper, and Paperboard Mills	35.62	14%	\$73,665
Household and Institutional Furniture and Kitchen Cabinet Manufacturing	10.14	60%	\$36,624
Rail Transportation	9.59	-4%	\$85,852
Cable and Other Subscription Programming	8.72	81%	\$74,440

With a total of 786 jobs in 2017, this industry has grown by 25% since 2012. While this growth has been more modest than other industries it has also been less volatile by comparison. Nearly all of this growth is attributable to local conditions as opposed to regional or national growth. This industry is expected to continue to grow by 7% between 2018-2023. Despite the high concentration of jobs in Allegany County, these jobs correspond to a single business in the Blind and Shade Manufacturing industry: Hunter Douglas Fabrication.

Within the same sector, Household and Institutional Furniture and Kitchen Cabinet Manufacturing is also 10 times more concentrated in Allegany county than average and has experienced substantial growth between 2012-2017 – increasing total number of jobs by 60%. This high growth rate is attributable to the low number of jobs in this industry to begin with, however overall growth has continued to be strong though slightly volatile in more recent years. By 2023 it is estimated that this industry will have 697 jobs, an additional 22% growth from 2018. This industry consists of four business locations in Allegany County including: American Woodmark and Bruck’s Custom Cabinetry.

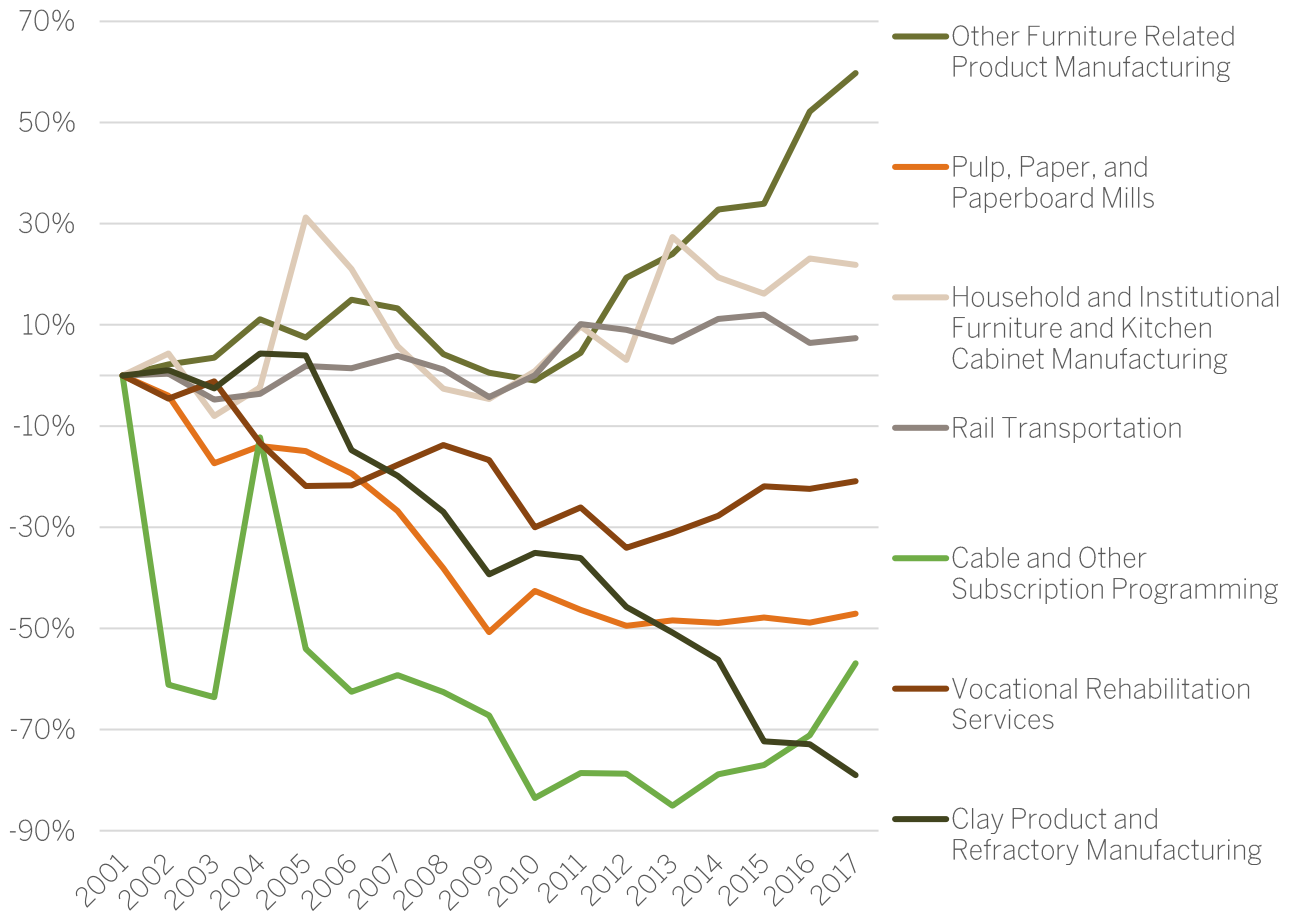
VOLATILITY AND CHANGES WITHIN THESE INDUSTRIES

The concentration of furniture manufacturing industries is an example of unique strengths that Allegany County can leverage in strategic economic development. The high concentration of jobs in these industries presents some challenges when considering the potential volatility of the Household and Institutional Furniture and Kitchen Cabinet Manufacturing industry and the small number of business locations in Allegany County for both industries. Disruption in either industry or for a particular business location could directly expose Allegany County workers to fluctuations in the form of unstable employment. Given the small number of business locations within the County, any such fluctuations could result in few or no alternative options for workers within the same industry.

Since 2001, Allegany County’s seven most unique industries have been subject to volatile shifts and most of these industries have declined during that time for the entire Allegany County Region. However, this is not the case for all of these industries which represent both significant opportunities and potential weaknesses for the County’s economy.



Cumulative Growth in Most Specialized Industries 2001-2017



MANUFACTURING

In total, Manufacturing accounts for 2,885 jobs in Allegany County, and has grown 14% in the past five years. Average earnings for jobs in this sector are \$56,714 per job. The five largest industries within this sector are Other Furniture Related Product Manufacturing, Pulp, Paper, and Paperboard Mills, Household and Institutional Furniture and Kitchen Cabinet Manufacturing, Plastics Product Manufacturing, and Other General Purpose Machinery Manufacturing. Other Furniture Related Product Manufacturing is the most concentrated industry in Allegany County and makes up 27% of all manufacturing jobs.

HEALTH CARE AND SOCIAL ASSISTANCE

Health Care and Social Assistance accounts for 6,448 jobs in Allegany County, and has grown 1% in the past five years. Average earnings for jobs in this sector are \$55,207 per job. The five largest industries in this sector are: General Medical and Surgical Hospitals, Nursing Care Facilities (Skilled Nursing Facilities), Offices of Physicians, Vocational Rehabilitation Services, and Individual and Family Services. General Medical and Surgical Hospitals is the largest industry in this sector, with 2,212 jobs or 35% of all jobs in the sector. This industry has the second highest average earnings per job with \$70,704, second only to Offices of Physicians.



PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES

Professional, Scientific, and Technical Services accounts for 985 jobs in Allegany County, and has grown 71% in the past five years. Average earnings for jobs in this sector are \$40,806 per job. The five largest industries in this sector are: Management, Scientific, and Technical Consulting Services, Accounting, Tax Preparation, Bookkeeping, and Payroll Services, Other Professional, Scientific, and Technical Services, Legal Services, and Computer Systems Design and Related Services. Management, Scientific, and Technical Consulting Services is the largest industry within this sector with 404 jobs, or 41% of all jobs in the sector. This industry has grown by 1,124% in the past five years, from just 33 jobs in 2012. This industry, however, has smaller average earnings per job than the industry average by \$14,596 per job.

OCCUPATIONAL MIX

The top ten occupations in Allegany County represent a cumulative 28.5% of all jobs within the County, a total of 9,043 jobs in 2017. Four of the top ten occupations have seen growth between 2012-2017. The remaining six have declined during that time, most notably Building Cleaning Workers and Bailiffs, Correctional Officers, and Jailers which have both decreased by 11%. The top three occupations are Secretaries and Administrative Assistants (1,296 jobs), Cashiers (1,119), and Registered Nurses (1,063). Within the top ten occupations Registered Nurses have the highest median hourly income at \$28.90 per hour.

Top Occupations in Allegany County in All Industries

Description	Employed in Industry Group (2017)	Percent Change (2012 - 2017)	Median Hourly Earnings
Secretaries and Administrative Assistants	1,302	0.46%	\$14.28
Cashiers	1,130	0.98%	\$11.50
Registered Nurses	1,094	2.92%	\$28.90
Fast Food and Counter Workers	956	-0.83%	\$9.28
Retail Salespersons	865	-5.46%	\$10.77
Customer Service Representatives	840	7.01%	\$11.26
Building Cleaning Workers	787	-10.57%	\$10.73
Nursing, Psychiatric, and Home Health Aides	741	-10.07%	\$11.77
Bailiffs, Correctional Officers, and Jailers	704	-10.77%	\$23.40
Office Clerks, General	625	-4.14%	\$11.21



STAFFING PATTERNS

The top ten occupations in large manufacturing industries have cumulatively grown by 39% between 2012 and 2017, all showing positive trends. The average median hourly pay rate is \$18.30, which is largely impacted by the high earnings for First-Line Supervisors of Production and Operating Workers (\$17.37 per hour), Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products (\$22.44 per hour), and General and Operations Managers (\$31.12 per hour). Together, these occupations account for 11.6% of all jobs in the five largest manufacturing industries.

These occupations require a high school diploma (or equivalent) and little to no experience except for Laborers and Freight, Stock, and Material Movers, Hand which has no formal education requirements and General and Operations Managers which requires a bachelor's education and typically five years of experience.

Among the five largest manufacturing industries, the most common job is Assemblers and Fabricators, All Other, Including Team Assemblers, with a total of 292 jobs or 19.1% of all jobs in these industries. This job category has median hourly earnings of \$10.98 per hour, and typically requires a high school diploma (or equivalent) with little to no experience. This occupation has grown 46% in the past five years.

Top Occupations in Allegany County in Manufacturing Industries

Description	Employed in Industry Group (2017)	% Change (2012 - 2017)	% of Total Jobs in Industry Group (2017)	Median Hourly Earnings
Assemblers and Fabricators, All Other, Including Team Assemblers	425	45.5%	19.1%	\$ 10.98
Paper Goods Machine Setters, Operators, and Tenders	160	34.5%	7.2%	\$ 17.37
First-Line Supervisors of Production and Operating Workers	85	32.8%	3.8%	\$ 27.62
Laborers and Freight, Stock, and Material Movers, Hand	79	43.6%	3.5%	\$ 11.66
Cabinetmakers and Bench Carpenters	65	54.8%	2.9%	\$ 17.13
Customer Service Representatives	63	46.5%	2.8%	\$ 11.26
Maintenance and Repair Workers, General	57	23.9%	2.5%	\$ 15.71
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	52	33.3%	2.3%	\$ 22.44
General and Operations Managers	48	50.0%	2.1%	\$ 31.12
Industrial Machinery Mechanics	45	28.6%	2.0%	\$ 17.71



TALENT PIPELINE

In 2017, Allegany County graduated 1,427 students with some form of certificate or degree. Of those 795 were Bachelor’s Degrees and 380 were Associate’s Degrees.⁷ Of the 1,427 program completions, 905 graduated from Frostburg State University and 522 graduated from Allegany College of Maryland.

Completions in Allegany County, 2017

Type of Award	Number of Completions
Certificates	142
Associate degrees	380
Bachelor's Degrees	795
Master's Degrees	98
Doctor's Degrees	12
All Completions	1,427

The most common program completed was Liberal Arts and Sciences/Liberal Studies with 146 completions, including 80 Bachelor’s Degrees and 66 Associate degrees. The County graduated 98 Registered Nurses with Associate degrees and 81 students (12 Associate’s and 69 Master’s) in General Education programs. The most common specific education degree was in Kindergarten/Preschool Education and Teaching with 30 Bachelor’s Degrees awarded. The County also graduated 38 students with Bachelor’s in General Engineering, and 34 Certificates in Health Professions and Related Clinical Sciences, Other.

⁷ All Program Completion data is from Economic Modeling Specialists International, 2018.3. The data does not include program completions for programs with Distance Learners.



Top Fifteen Programs in Allegany County

Description	Certificate Completions	Associate Degrees	Bachelor's Degrees	Master's Degrees	All Completions
Liberal Arts and Sciences/Liberal Studies	0	66	80	0	146
Registered Nursing/Registered Nurse	0	98	0	0	98
Education, General	0	12	0	69	81
Psychology, General	0	0	79	0	79
Criminal Justice/Police Science	6	17	56	0	79
Kinesiology and Exercise Science	0	0	45	0	45
Kindergarten/Preschool Education and Teaching	0	0	39	0	39
Engineering, General	0	0	38	0	38
Mass Communication/Media Studies	0	0	36	0	36
Social Work	0	0	35	0	35
Biology/Biological Sciences, General	0	0	34	0	34
Health Professions and Related Clinical Sciences, Other	34	0	0	0	34
Sociology	0	0	33	0	33
Fine/Studio Arts, General	0	0	30	0	30
Accounting	0	0	29	0	29



CLUSTER ANALYSIS

A cluster analysis was performed in order to understand on a more complex level how companies and industries within the Allegany County region are connected. This analysis was conducted using the method pioneered by Professor Michael E. Porter of Harvard for the U.S. Cluster Mapping Project.⁸ For this analysis, a weighted indicator representing the following factors were used to identify the most important clusters in the Allegany County region:

1. Total Employment
2. Location Quotient
3. Competitive Effect (over the last five years)
4. Regional Exports
5. Taxes
6. Average Earnings Per Job

Indicators for total employment and location quotient were twice the weight as the other four factors to ensure that the clusters identified contribute to the overall employment in the region and are specialized to the region. The top fifteen sectors identified included five local sectors and ten traded sectors. The five local sectors consist of industries that provide local services and products and are important for an overall resilient economy that provides adequate amenities for its residents. However, these industries do not contribute to the overall economic base for the region.

Top Five Local Clusters

Cluster Name	Total Employment	Location Quotient	Competitive Effect	Regional Exports	Taxes	Average Earnings Per Job
Local Motor Vehicle Products and Services	9,964	1.53	-440	\$771,515,652	\$137,674,704	\$38,307
Local Retailing of Clothing and General Merchandise	7,465	1.12	-345	\$324,677,100	\$88,016,711	\$24,520
Local Logistical Services	7,023	1.98	-123	\$730,985,846	\$25,249,749	\$47,285
Local Food and Beverage Processing and Distribution	6,754	1.11	-376	\$452,998,945	\$69,446,286	\$30,332
Local Health Services	28,550	1.23	-1,272	\$919,566,598	\$74,838,038	\$56,266

⁸ More information on this method including a breakdown how industries are mapped to clusters can be found at clustermapping.us. All data used in the cluster analysis is from Economic Modeling Specialists International, 2018.3.



The top ten traded clusters total 20,798 of the 221,144 jobs in the Allegany County region or 9.3%. While these clusters all contribute to the regional economy in different ways, they vary in total employment, concentration, competitiveness, exports, taxes, and average earnings per job. They also differ in how they impact the Allegany County economy specifically.

Additional information on the individual clusters can be found in Appendix 2.

Top 10 Traded Clusters

Cluster Name	Total Employment	Location Quotient	Competitive Effect	Regional Exports	Taxes	Average Earnings Per Job
Distribution and Electronic Commerce	8,978	1.08	764	\$873,186,621	\$126,861,668	\$45,918
Coal Mining	883	11.37	-76	\$346,659,864	\$35,760,611	\$94,147
Production Technology and Heavy Machinery	4,175	3.27	305	\$1,906,539,949	\$18,375,476	\$82,319
Recreational and Small Electric Goods	1,019	3.80	95	\$209,675,670	\$1,950,147	\$44,984
Paper and Packaging	969	1.92	212	\$466,798,802	\$6,289,542	\$68,284
Construction Products and Services	1,606	1.25	257	\$412,569,190	\$6,147,085	\$73,474
Aerospace Vehicles and Defense	1,379	1.65	148	\$440,363,362	\$8,746,404	\$107,619
Furniture	1,220	2.19	216	\$163,647,837	\$1,151,598	\$41,160
Footwear	92	3.84	44	\$20,077,698	\$69,052	\$36,672
Nonmetal Mining	477	3.53	-55	\$174,609,527	\$4,807,402	\$80,189



Distribution and Electronic Commerce

The Distribution and Electronic Commerce cluster represents 9,036 jobs in the Allegany County Region but only 563 in Allegany County. However, the industry has grown 50% in the Allegany County over the last five years compared to 35% in the region. General Warehousing Storage is the largest industry in the cluster with 4,507 jobs and has grown 105% in the last five years. The other top five industries are All Other Business Support Services, Wholesale Trade Agents and Brokers, Industrial Machinery and Equipment Merchant Wholesalers, and Other Commercial Equipment Merchant Wholesalers. Of the top ten traded clusters, this cluster provides the most tax revenue to the region, \$127 million.

Coal Mining

The Coal Mining Cluster has 883 jobs in the region and 69 in Allegany County alone. The industry has seen significant losses in employment in both the region and the County, 46% and 31% respectively over the last five years. The cluster is highly specialized in the region with a location quotient of 11.37. However, the negative employment trend in the cluster represents a significant threat to the region.

Production Technology and Heavy Machinery

The Production Technology and Heavy Machinery cluster has 4,188 jobs in the region and 84 jobs in Allegany County. The cluster has grown 3% in the region and 121% in the County over the last three years. Other Engine Equipment Manufacturing is the largest industry in the sector with 1,532 jobs in the region. However, it has decreased by 4% over the last five years. Construction Machinery Manufacturing; Overhead Traveling Crane, Hoist, and Monorail System Manufacturing; Mining Machinery and Equipment Manufacturing; and Industrial Truck, Tractor, Trailer, and Stacker Machinery Manufacturing are the four next largest industries. Significantly, 96% of the cluster's sales are exports.

Recreational and Small Electric Goods

The Recreational and Small Electric Goods cluster has 1,031 jobs in the region with the majority, 786, in Allegany County. The cluster has grown 12% in the region and 25% in the County over the last five years. Significantly, there are only 12 establishments in this cluster in the region and only one in Allegany County. Blind and Shade Manufacturing is the largest industry, followed by Motorcycle, Bicycle, and Parts Manufacturing; All Other Miscellaneous Manufacturing; Musical Instrument Manufacturing; and Small Electrical Appliance Manufacturing. The cluster sells 97% of its product outside of the region.

Paper and Packaging

The Paper and Packaging Cluster has 969 jobs in the region with 710 in Allegany County. The industry has seen modest growth over the last five years, 15% in the region and 16% in the County. The largest industries in the cluster are Paper (except Newsprint) Mills; Corrugated and Solid Fiber Box Manufacturing; Sanitary Paper Product Manufacturing.



Construction Products and Services

There are 1,611 jobs in the Construction Products and Services in the region but only 27 in Allegany County. Industrial Building Construction; Power and Communication Line and Related Structures Construction; Metal Tank (Heavy Gauge) Manufacturing; Cement Manufacturing; and Mineral Wool Manufacturing are the largest industries in the cluster in the region.

Aerospace Vehicles and Defense

The Aerospace Vehicles and Defense cluster has 1,380 jobs in the region but none in Allegany County. The vast majority of these jobs (1,044) are in Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing. However, these jobs are all located at one firm. There are other industries in the cluster, including one establishment with 280 jobs in Aircraft Engine and Engine Parts Manufacturing, one establishment with 55 jobs in Aircraft Manufacturing, and seven establishments with less than ten total jobs in Other Aircraft Parts and Auxiliary Equipment Manufacturing.

Furniture

The Furniture cluster in the region has 1,230 jobs in the region with 532 in Allegany County. The cluster has seen significant growth over the last five years, 37% in the region and 60% in the County. The largest industry in the cluster is Wood Kitchen Cabinet and Countertop Manufacturing with 633 jobs. The remaining top five industries are Mattress Manufacturing; Nonupholstered Wood Household Furniture Manufacturing; Showcase, partition, Shelving, and Locker Manufacturing; and Institutional Furniture Manufacturing.

Footwear

The Footwear cluster has the least employment of the top ten traded clusters with only 92 jobs. However, the cluster has seen 80% growth in the last five years. There are less than ten jobs in the cluster in Allegany County. Leather and Hide Tanning and Finishing has 35 jobs in the region, and footwear manufacturing has 57 jobs in the region.

Nonmetal Mining

There are 496 jobs in the Nonmetal Mining cluster in the region. There are currently none in Allegany County; however, there were 31 in the County in 2012. The largest industry in the cluster is Crushed and Broken Limestone Mining and Quarrying with 326 jobs. The remaining top industries are Industrial Sand Mining; Dimension Stone Mining and Quarrying; Construction Sand and Gravel Mining; and Other Crushed and Broken Stone Mining Quarrying.



SUPPLY CHAIN GAPS

An analysis of the supply chain for the top clusters can help identify potential gaps that could be filled by attracting additional businesses. The charts in Appendix 4 highlight the top ten supplier industries for six of the top fifteen clusters, including the proportion of each industry that is imported from outside of the region. Industries with high percentage of imports represent potential targets for attraction. Analysis of this data was used to identify the below industries with significant demand within the region.

Industries with High Demand and a High Percentage of Imports

Demand for	% Demand met by Imports	Total Demand
Corporate, Subsidiary, and Regional Managing Offices	98.2%	\$668,535,218
Iron and Steel Mills and Ferroalloy Manufacturing	94.1%	\$148,848,229
Aircraft Manufacturing	85.9%	\$65,999,581
Machine Shops	96.5%	\$64,105,561
Corrugated and Solid Fiber Box Manufacturing	93.5%	\$48,456,345
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	100.0%	\$45,883,056
Motor Vehicle Gasoline Engine and Engine Parts Manufacturing	98.6%	\$42,896,718
Wood Kitchen Cabinet and Countertop Manufacturing	83.2%	\$38,245,052
Motor Vehicle Electrical and Electronic Equipment Manufacturing	100.0%	\$36,827,387
Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing	100.0%	\$31,893,411
Paperboard Mills	100.0%	\$30,455,190
Urethane and Other Foam Product (except Polystyrene) Manufacturing	100.0%	\$30,206,669
Iron Foundries	97.3%	\$26,444,569
Rubber Product Manufacturing for Mechanical Use	90.8%	\$17,337,362
Other Aircraft Parts and Auxiliary Equipment Manufacturing	99.7%	\$16,409,315
Mechanical Power Transmission Equipment Manufacturing	100.0%	\$15,431,258
Other Guided Missile and Space Vehicle Parts and Auxiliary Equipment Manufacturing	100.0%	\$14,198,127
Other Fabricated Wire Product Manufacturing	81.0%	\$11,349,639
Reconstituted Wood Product Manufacturing	100.0%	\$9,069,677
Pulp Mills	100.0%	\$8,803,378
Spring Manufacturing	65.0%	\$8,513,048
Textile and Fabric Finishing Mills	96.8%	\$8,175,052

Source: Economic Modeling Specialists International, 2018.3



FEASIBILITY ANALYSIS

In order to assess the feasibility of attracting the industries identified as having high demand, an index of the level of difficulty to attract each industry was calculated. This index was based on the following factors:

- 1) Existing industry employment (in Allegany County and the region);
- 2) Location Quotient (in Allegany County and the region);
- 3) Competitive effect (in Allegany County and the region);
- 4) Existing workforce in top occupations that support the industry (in Allegany County);
- 5) Graduates from educational programs to support the industry (in Allegany County).

The above factors were used to create an index of difficulty to attract each industry ranging from 0 (least difficult) to 1 (most difficult). The feasibility matrix on the following page plots the level of difficulty to attract each industry versus the industry's latent demand (calculated as regional demand met by imports). Three outlier industries were listed in separate charts representing relatively high or low values on the main chart. The majority of industries fell within a similar range of values as depicted in the main chart.

The industry with the highest demand was Corporate Subsidiary and Regional Managing Offices. This industry mostly represents headquarter and regional offices of major businesses. The high amount of imports generally indicates that most of these employers in the region are standalone locations or are headquartered outside of the region. The industry with the lowest demand was Textile and Fabric Finishing Mills; however, it also had lower index of difficulty (less difficulty) than many of the industries examined.

The most difficult industry to attract was Iron and Steel Mills and Ferroalloy Manufacturing. The related industry of Iron Foundries was the next most difficult industry to attract according to the index. Both industries require access to key natural resources and are therefore unlikely to be realistic target industries. The least difficult industry to attract was Wood Kitchen Cabinet and Countertop Manufacturing. This is primarily due to the existing industry employment already in both Allegany County and the region, representing an opportunity to grow related companies making similar products.

The following industries have high demand and relatively low difficulty to attract:

- Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing;
- Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing; and
- Aircraft Manufacturing.

These industries relate to the presence of Northrup Grumman, indicating the potential success for some adjacent industries in the County. Additionally, the above industries also rely heavily on computer science and technology related occupations, making the presence of Frostburg State University a key asset. This could indicate that other high technology manufacturing might be logical target industries for attraction. While these industries may require a smaller workforce due to automation, they are heavily dependent on skilled workers capable of operating complex machinery.



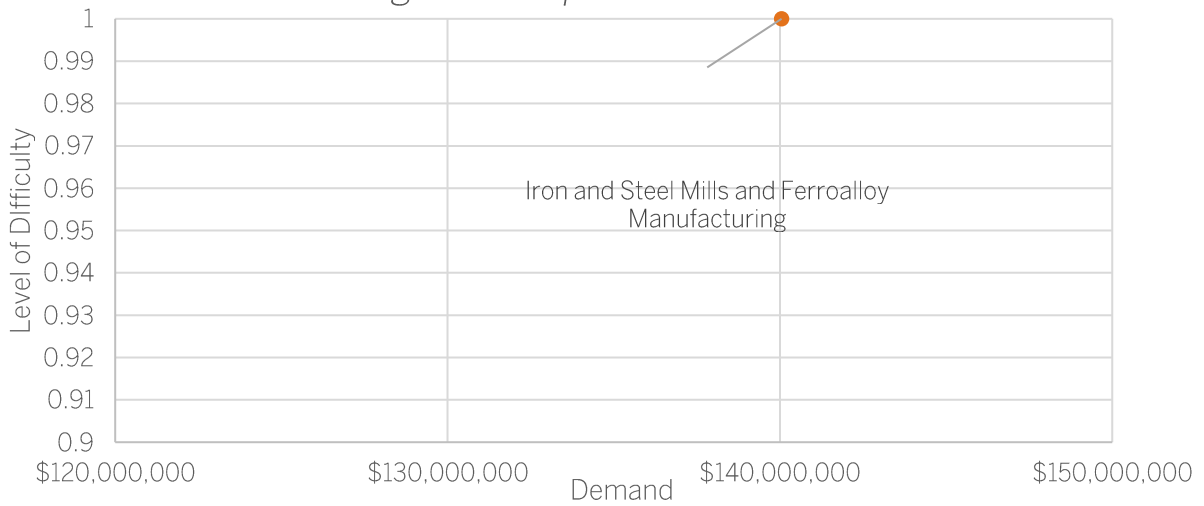
Feasibility Matrix



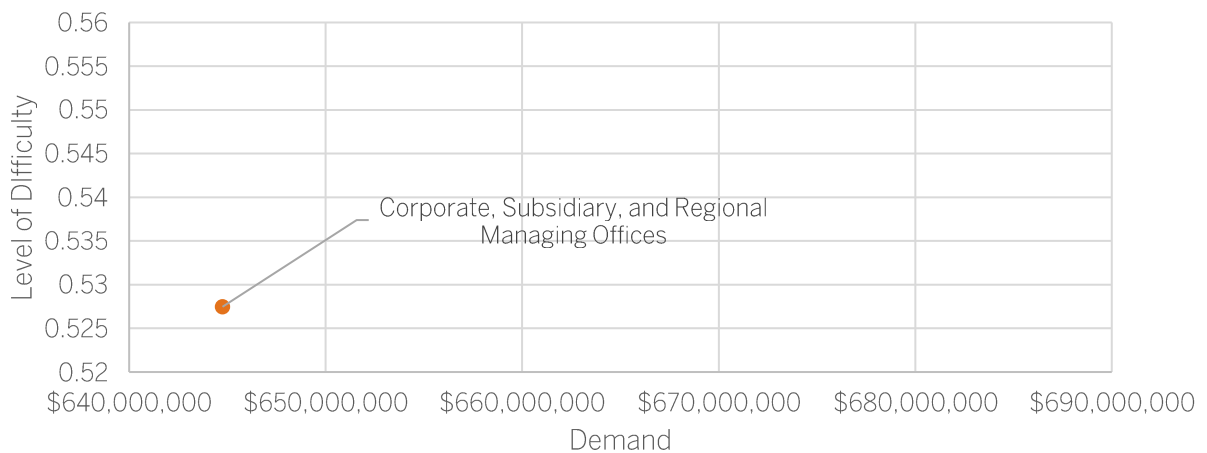
Left Far Bottom of Main Chart



Right Far Top of Main Chart



Far Right Bottom of Main Chart



RETAIL ANALYSIS

Retail plays a key role in the regional economy and is a vital factor for successful strategic economic planning. The primary focus of this section is to understand the following items and what the market can do to support retailing in Allegany County, MD:

1. Existing retail environment;
2. Consumer supply and demand, and gaps in the retail market; and
3. Allegany County in comparison to other comparable markets.

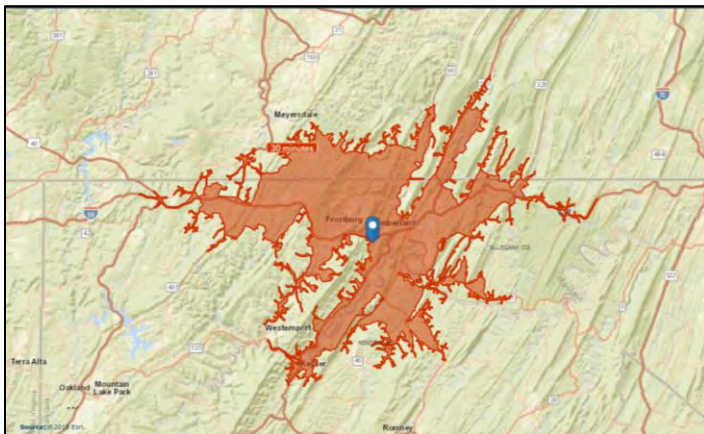
Existing Retail Environment

Nationally, the retail environment continues to show positive growth trends in a 5%-6% range on a monthly basis. However, when non-store (mostly ecommerce) sales are removed and the impact of gasoline prices is factored out, store-based sales remain flat to slightly negative. Going forward, all retail sales will likely be negatively impacted by the implementation of current trade policies.

At present, contraction is still the trend for bricks and sticks retailers. In 2017, 7,087 stores announced they were closing nationally. Year-to-date in August 4,612 more stores announced closings. The top five announcements were: ToysRUs (881 stores), Walgreens (600), Sears/Kmart (330), Ascena (267) and Bon-Ton (260). Of particular import to Allegany County are Sears and Bon-Ton, two of the five major anchors at Country Club Mall located in La Vale. If these stores close, the mall will lose up to half its traffic and will be hard pressed to replace them in the near term. On the positive side, new stores are opening. As of August, 2,639 new stores have been announced, led by Dollar General (900).

Allegany County, MD along with Mineral County, WV comprise the Cumberland, MD-WV Metropolitan Area. Allegany County is the center of the region's major institutions: Cultural, educational, medical and commercial. All of the region's major shopping destinations are located in the County. At present there are 19 shopping centers in operation as well as "Main Street" shops in Cumberland and Frostburg. Most of these shopping locations are outdated by today's standards. All but two of the 19 shopping centers opened before 2000.

Country Club Mall Focus Area



Country Club Mall is the dominant shopping destination in the region. The mall is leased and managed by Gumberg Asset Management Corp. The mall opened in 1981 and has been renovated and expanded in the past. Today the 600,000 square foot mall has 60 stores including five anchors and a cinema: JCPenney, Sears, The Bon-Ton, T.J.Maxx and Walmart. As mentioned before, both Sears and The Bon-Ton are in danger of closing. Should either or both of these stores close, the mall would be severely



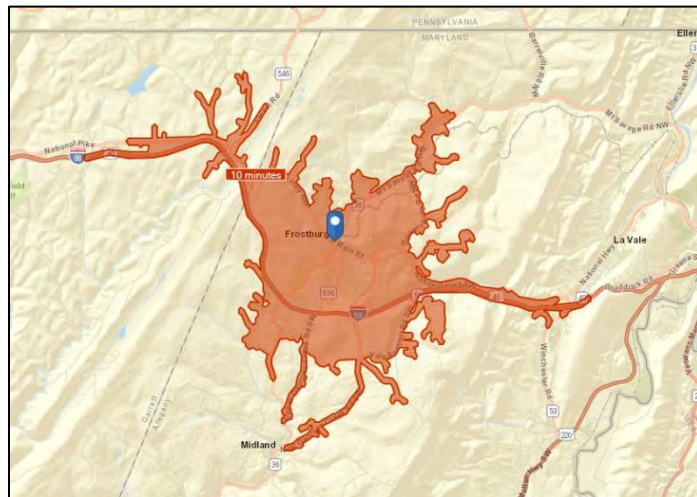
impacted as would traffic to the surrounding area. In addition to the mall, there are a number of smaller centers located in close proximity, including a Kohl's anchored center across the street.

Along with the Country Club Mall area, retail activity is focused in two main street areas located in Cumberland and Frostburg. These areas are home to mom and pop retail operations, cultural centers, restaurants and a variety of tourist attractions. Because of its scale and anchor attraction, Country Club Mall can draw customers from a much broader trade area, in this case a 30-minute drive time. In the case of Cumberland and Frostburg, their appeal is local and limited to a ten-minute drive and a ten-minute walk.

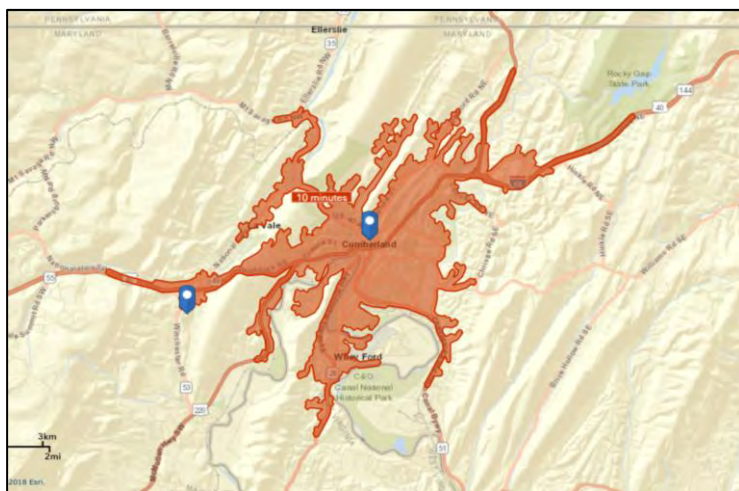
The trade area for the mall contains 87,376 persons today, with slight declines forecasted through 2023, similar to the metro area. While this is a relatively modest population for an enclosed regional mall, it is typical of malls located in non-urban markets. Incomes are above average for the region and compared to the other focus areas. This is to be expected given its proximity to La Vale, which has the highest median household income in the region, \$58,762 in 2018.

10-minute Drive Time from Frostburg, MD

The two main street focus areas, Cumberland and Frostburg, lack a major traffic generator and the retail scale needed to draw shoppers from any distance. In these situations, a 10-minute drive time is about the norm. For Cumberland, its current population is 25,699 and has been declining since the 2010 census. This trend is expected to continue through 2023. Frostburg's population is less than half that of Cumberland and is also declining. Income for both areas are similar to the metro average.



10-minute Drive Time from Cumberland, MD



However, each focus area has a reason to exist. Cumberland is historic and grew from its transportation nexus: key roads (the Cumberland Road), railroads and canal (Chesapeake & Ohio). In the 19th century it was nicknamed "The Queen City". Downtown Cumberland with its historic district and vintage, brick pedestrian mall along Baltimore St. has been successful in attracting both locals and tourists. Likewise, Frostburg has its main street attractions, albeit at a smaller scale than downtown Cumberland. But it is proximate to



Frostburg State University and its more than 6,000 students and employees. The campus is partially within Main Streets 10-minute walk zone.

Each of the three focus areas has its individual appeal for retailers:

- The Country Club Mall area should remain a major focus of retailing in the county. The appropriate strategy would be to build on and leverage its current regional appeal. The mall and surrounding area will appeal to traditional retailers and visitors as well. Other commercial users will also consider the area based upon the scale of current activity, its central location and access to the interstate highway.
- Downtown Cumberland can build on its historic appeal to the local and visitor markets. The Sage Policy Group’s 2016 Analysis of Four Strategic Sites in Cumberland, MD proposed multiple strategies to revitalize areas around Baltimore Street and the surrounding Downtown Area that would combat vacancy and low market capture rates in key Downtown Areas.
- Downtown Frostburg should focus on its access to FSU students and employees.

Consumer Demand and Supply Analysis

Consumer demand and supply analysis, also known as a retail leakage study, determines whether the market is being served from the retail customer’s point of view. The study identifies where consumers are forced to look outside of the local market for their desired goods and services. The study is focused at the metro area level.

The level of demand within the market is only half the picture with the other half being the supply of retailers available to absorb the demand. If a market is in balance, this means there are exactly enough retailers to absorb all the demand for goods and services. This situation is rarely found in the real world. There is almost always an imbalance in either supply or demand. In spite of the somewhat unimpressive market support (demand), a real shortage of retailers within the metro area has resulted in demand exceeding supply.

Summary of Retail Demand, Supply, and Gap

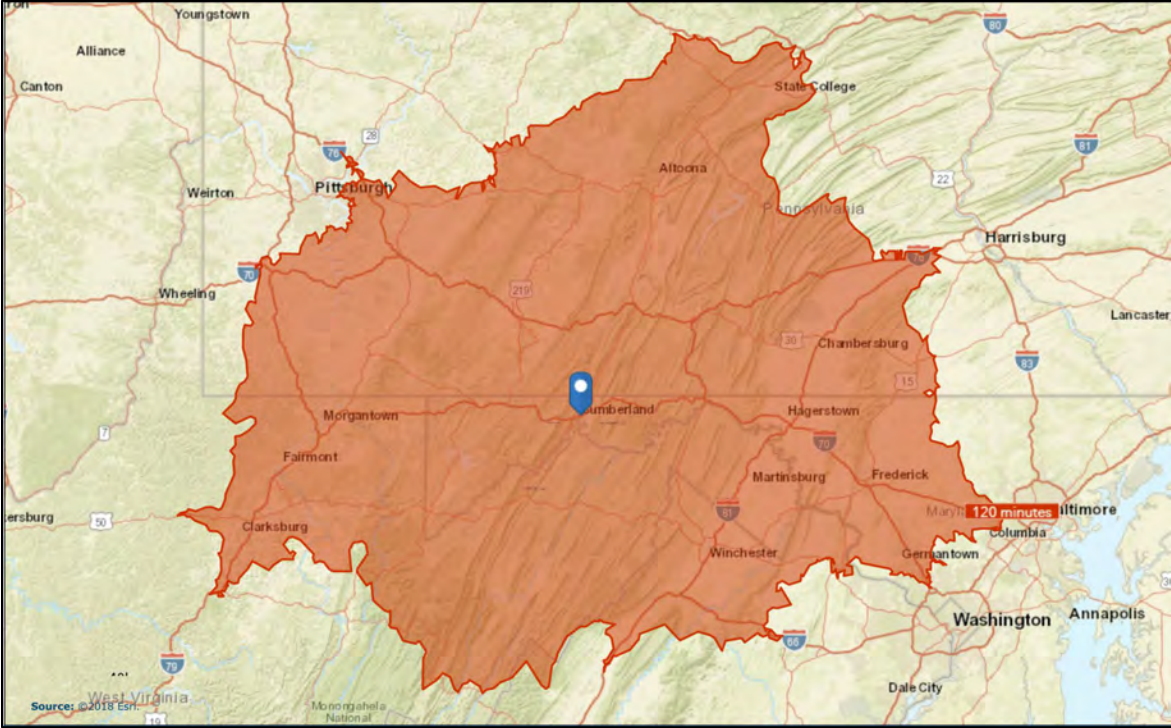
	Demand (Retail Potential)	Supply (Retail Supply)	Retail Gap (Leakage)
Total	\$1,113,520,192	\$1,075,029,438	\$38,490,754
Retail Trade	\$1,014,239,596	\$956,549,951	\$57,689,645
Food & Drink	\$99,280,596	\$118,479,487	-\$19,198,891

In fact, within the metro area in 2018 demand for Total Retail Trade and Food & Drink exceeds \$1.11 billion while the supply of retailers is sufficient to absorb only approximately \$1.07 billion. The resultant gap between supply and demand results in nearly \$38.5 million in available sales (demand). Considering Total Retail Trade separately, the gap is even larger, \$57.7 million. Two things can happen to this sales gap: It can go unspent or it can flow out of the metro area. In reality, some of both occurs, but presumably most of it is leaking outside the metro area. In the



case of Cumberland, this means to the Pittsburgh, PA region to the north or to the Baltimore-Washington, DC region to the east.

2-hour Drive Time Pittsburgh, PA and Baltimore, MD-Washington, DC



Retail Gap for Retail Trade and Food and Drink Subsectors

Subsector	Demand	Supply	Retail Gap
Bldg. Material & Supplies Dealers	\$64,932,306	\$27,407,892	\$37,524,414
Gasoline Stations	\$105,303,726	\$69,328,560	\$35,975,166
Clothing Stores	\$36,756,076	\$16,742,969	\$20,013,107
Electronics & Appliance Stores	\$32,537,449	\$13,572,875	\$18,964,574
Furniture Stores	\$18,698,344	\$3,487,329	\$15,211,015
Other General Merchandise Stores	\$52,825,276	\$37,876,493	\$14,948,783
Other Miscellaneous Store Retailers	\$22,958,024	\$11,480,136	\$11,477,888
Sporting Goods/Hobby/Musical Instr Stores	\$22,662,527	\$12,322,768	\$10,339,759
Home Furnishings Stores	\$13,913,437	\$3,925,983	\$9,987,454
Other Motor Vehicle Dealers	\$18,154,281	\$8,166,828	\$9,987,453
Electronic Shopping & Mail-Order Houses	\$6,209,898	\$451,770	\$5,758,128
Beer, Wine & Liquor Stores	\$14,342,182	\$8,781,309	\$5,560,873
Shoe Stores	\$8,416,835	\$3,241,207	\$5,175,628
Jewelry, Luggage & Leather Goods Stores	\$8,505,774	\$4,058,711	\$4,447,063
Lawn & Garden Equip & Supply Stores	\$5,470,434	\$1,754,345	\$3,716,089
Specialty Food Stores	\$7,838,354	\$4,285,057	\$3,553,297
Office Supplies, Stationery & Gift Stores	\$9,373,622	\$6,438,202	\$2,935,420
Auto Parts, Accessories & Tire Stores	\$17,436,707	\$14,853,249	\$2,583,458
Grocery Stores	\$166,468,951	\$163,897,845	\$2,571,106
Book, Periodical & Music Stores	\$4,154,939	\$2,102,164	\$2,052,775
Special Food Services	\$2,723,280	\$1,405,230	\$1,318,050
Vending Machine Operators	\$1,151,342	\$397,741	\$753,601
Florists	\$1,958,524	\$1,497,809	\$460,715
Drinking Places - Alcoholic Beverages	\$2,853,484	\$3,545,784	-\$692,300
Used Merchandise Stores	\$3,288,415	\$4,812,340	-\$1,523,925
Direct Selling Establishments	\$5,306,124	\$7,213,145	-\$1,907,021
Health & Personal Care Stores	\$65,420,949	\$76,348,931	-\$10,927,982
Restaurants/Other Eating Places	\$93,703,832	\$113,528,473	-\$19,824,641
Automobile Dealers	\$188,482,789	\$213,692,805	-\$25,210,016
Department Stores Excluding Leased Depts.	\$111,672,311	\$238,411,488	-\$126,739,177
Total			\$38,490,754



Of the 30 industry sub-groups, 23 are potentially leaking \$225.3 million in sales outside the metro area. If you assume the average store productivity is \$350 PSF, this leakage could theoretically support an additional 643,759 square feet of store space. The key word is theoretically. In reality, the Cumberland metro will be able to recapture only a small portion the leakage from its current destinations, principally the Pittsburgh, PA and Baltimore, MD-Washington, DC markets, whose orbits are too strong for Cumberland to compete with.

Nonetheless, some leakage could be recaptured if Allegany County can put a strong campaign together. Assume that the metro could recapture 10% to 20% of the leakage:

$$\$225.3 \text{ million} / \$350 \text{ PSF} = 643,759 \text{ SF}$$

$$@ 10 \% \text{ Recapture} = 64,376 \text{ SF}$$

$$@ 20 \% \text{ Recapture} = 128,752 \text{ SF}$$

This new store space would represent 36 to 72 new stores. All of these stores would be located in Allegany County in one of the county’s three focus areas: the Country Club Mall area, Downtown Cumberland, or Downtown Frostburg.

Comparable Communities

Cumberland is a key anchor for retail activities in Allegany County. Based on population size, number of households, and median household income Hot Springs, AR and Victoria, TX provide two cases of comparable communities for retail comparison to Cumberland, MD. While Cumberland’s population is expected to decrease by 0.33% between 2018 and 2023 these two communities expect modest growth of 0.39% in Hot Spring, AR and 1.04% in Victoria, TX. Both Cumberland and Hot Springs expect slower growth than that national average of 0.83% expected population growth. While Victoria’s median household income is higher than both Cumberland and Hot Springs, all three communities lag behind the national average median household income of \$58,100.

The median age for the United States is 38.3 years old. Both Cumberland and Hot Springs have an older population, while Victoria is closer to the national average. All three communities are more homogenous than the United States as a whole with predominantly white populations. As of 2018, 90.9% of Cumberland, 84.7% of Hot Springs, and 78.4% of Victoria identified as white alone (no other race). This is higher than the United States average of 69.9%. Victoria has a larger population of residents of Hispanic origin (46.8%) while only 1.6% and 5.8% of the population identifies as of Hispanic origin in Cumberland and Hot Springs respectively.

Demographic Characteristics of Comparable Communities

Metro Area	2018 Population	2018 Households	2018 Median HH Income	Median Age
Cumberland, MD	101,790	40,253	\$41,685	43
Hot Springs, AR	98,849	42,096	\$41,784	46.7
Victoria, TX	104,042	38,364	\$53,937	38.1



Comparing the overall size, affluence, and age of these communities Hot Springs bears closer resemblance to Cumberland, however all have similar retail demand with minor demographic differences. However, Cumberland stands out as having a large amount of retail gap where a significant amount of retail potential is leaking to areas outside of the market. This is especially due to the significant retail gap in retail trade in Cumberland.

		Demand	Supply	Retail Gap
Cumberland, MD-WV	Total Retail Trade and Food & Drink	\$1,113,520,192	\$1,075,029,438	\$38,490,754
	Total Retail Trade	\$1,014,239,596	\$956,549,951	\$57,689,645
	Total Food & Drink	\$99,280,596	\$118,479,487	-\$19,198,891
Hot Springs, AR	Total Retail Trade and Food & Drink	\$1,240,650,172	\$1,754,840,982	-\$514,190,810
	Total Retail Trade	\$1,128,114,610	\$1,612,708,960	-\$484,594,352
	Total Food & Drink	\$112,535,562	\$142,132,020	-\$29,596,458
Victoria, TX	Total Retail Trade and Food & Drink	\$1,350,256,213	\$1,656,390,781	-\$306,134,568
	Total Retail Trade	\$1,219,449,591	\$1,516,626,589	-\$297,176,998
	Total Food & Drink	\$130,806,622	\$139,764,192	-\$8,957,570



REAL ESTATE ANALYSIS

LoopNet lists 94 commercial properties for sale and for lease in Allegany County, MD. Of those listings 64 are in Cumberland, seven are in Frostburg, and 22 are in other cities throughout the County. In total, 76 of the properties are for sale. The most common listing is for some form of retail (20 listings), followed by land for residential use (18 listings) and office buildings (13 listings).

For sale prices range from a low of \$18,000 for a 0.81-acre land parcel to \$7,000,000 for a 130,260 square foot (SF) industrial warehouse, both located in Cumberland. The large number of available retail sites in the County in addition to large occupant ready spaces for industrial and commercial activities provides a base for a variety of development efforts in Allegany County.

Real Estate Listings by Property Type

Property Type	Number of Listings	Average Listing Price
Retail	20	\$336,740.51
Land for Residential	18	\$309,552.88
Office	13	\$247,422.69
Commercial	12	\$622,500.00
Industrial	12	\$1,446,669.79



TOURISM ANALYSIS

The following tourism analysis looks at national, state, and local trends in the market in order to assess the recent and potential areas for growth. A discussion of the different tourism markets highlights types of visitors Allegany County could target. Lastly, a case study analysis compares the existing tourism products and assets in the County with similar products elsewhere to understand the ways that other tourist destinations have improved upon these products and marketed them to potential visitors.

NATIONAL TOURISM TRENDS

Tourism is a major driver of economic development and has a major impact on local economies and jobs. In 2017, the travel industry generated \$2.4 trillion for the U.S. economy, supporting 15.6 million American jobs. One in nine private sector U.S. jobs directly or indirectly rely on the travel industry.⁹ On average, every \$1 million in travel goods and services sales directly supports eight jobs. In contrast, on average, every \$1 million in sales in other industries directly supports five jobs. According to the U.S. Travel Association, travel-dependent leisure and the hospitality sector are the largest source of employment for small businesses in the U.S.

According to 76% of corporate executives in a 2017 Area Development Survey of Corporate Executives, quality of life plays a major role in choosing a location for new business facilities. Additionally, for talented, relocating employees, travel to a destination leaves a significant impression on their perception of place. A recent Development Counselors International survey of a thousand working-age individuals indicated that more than three-quarters of employed Americans identified firsthand experience as an instrumental component in forming impressions of a community, ranking higher than any other source (including internet research, social media, rankings, or word-of-mouth). Destination marketers are uniquely positioned to market to businesses or employees looking to relocate.

STATE & LOCAL TOURISM TRENDS

In 2017, Maryland tourism generated \$2.4 billion in state and local taxes, as a result of 42.5 million statewide visitors. In the same year, state visitor spending reached \$17.7 billion which is a 2.1% increase from the previous year. Between 2009 and 2017 visitor spending grew annually for eight straight years in Maryland. This spending can be divided into five categories: transportation, recreation, retail, lodging, and food & beverage. Among these categories, transportation represented the highest expense with \$5.5 billion.¹⁰

⁹ "Travel: America's Unsung Hero of Job Creation" Fact Sheet by U.S. Travel Association.

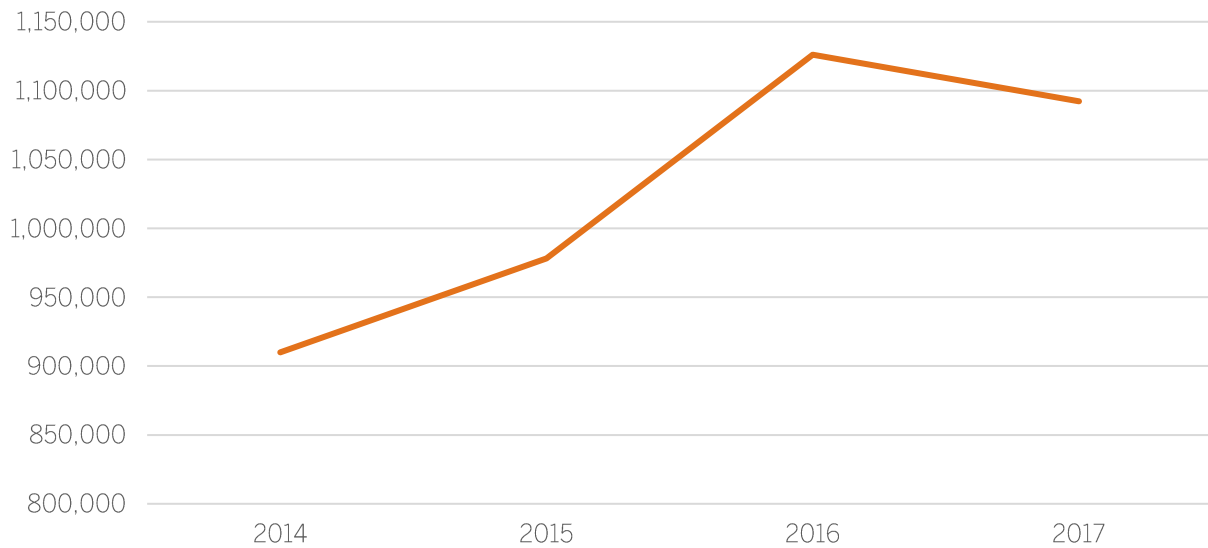
¹⁰ "Economic Impact of Tourism in Maryland – 2017 Analysis" by Tourism Economics



Maryland Tourist Spending by Type

Category	Total Spent in 2017 (\$ Billion)	Share of Total
Transportation	5.5	31%
Recreation	2.4	13%
Retail	2.4	13%
Lodging	3.4	20%
Food & Beverage	4.0	23%
Grand Total	17.7	

Hotel/Motel Tax Revenue in Allegany County



A large economic impact for Allegany County is through hotel/motel tax revenue. Despite a small decrease in tax revenue in 2017, the total revenue generated from hotel/motel tax in Allegany County has increased since 2014 and remained over \$1 million for the second year in a row.¹¹

¹¹ "Allegany County, Maryland Comprehensive Annual Financial Reports 2014-2017"



TOURISM MARKET TRENDS

Three major classes of tourism include cultural heritage tourism, outdoor recreation and tourism, and the more niche craft food and beverage tourism. All three represent significant opportunities for revenue and increased economic activities as a result of non-local visitors.

Cultural and Heritage Tourism

The 2013 Cultural & Heritage Traveler Study among U.S. domestic travelers indicated that 76% of all U.S. leisure travelers participate in cultural and / or heritage activities while traveling.¹² Among these travelers, there are five types:

- Passionate (14% of leisure travelers) - Seek out cultural and heritage trips/main driver of destination choice
- Well-rounded (12% of leisure travelers) - Cultural/Heritage trips are key driver in destination choice, but open to all types of activities
- Aspirational (25% of leisure travelers) - Desire to participate in cultural/heritage activities, but have limited experiences during most recent trip
- Self-guided/Accidental (14% leisure travelers) - Take advantage of cultural and heritage activities, but not a main driver for destination choice
- Keeping it Light (12% of leisure travelers) - Do not seek out cultural and heritage activities but will attend what they perceive as fun art/cultural/music events

In 2013, it was estimated that \$171 billion of economic impact was contributed by cultural and heritage travelers. According to Trip Advisor, the world's largest online provider of bookable experiences, tours, and activities, historic and heritage experiences saw a +125% growth in bookings in 2018.

Outdoor Recreation & Tourism

In addition to cultural/heritage travelers, a large portion of tourists seek out natural landscapes and outdoor destinations in their travels. A 2017 Outdoor Industry Association (OIA) Report estimated that outdoor recreation generates \$887 billion in annual consumer spending. Of this, \$702 billion is estimated to be trip related expenses. Altogether, this spending generates an additional \$65 billion in federal tax revenue and \$59.2 billion in state and local tax revenue. The resulting impact is 7.6 million jobs. The 2016 OIA Outdoor Participation Report indicated that nearly half (48.8%) of the U.S. population participated in at least one outdoor activity in 2016.

Craft Food & Beverage Tourism

A third attraction that draws visitors is the craft food and beer industry. In 2017, the craft beer industry contributed \$76.2 billion to the U.S. Economy, according to the Brewers Association. Most notably, overall beer sales have decreased by 1.2% while craft beer sales increased by 5% in the same year. In Maryland, craft beverage tourism had an economic impact of \$826 million in 2017. In total, this equates to 1.6 breweries per 100,000 adults age 21 or older in the state.

¹² "Cultural & Heritage Traveler Study" by Shop America Alliance & U.S. Cultural & Heritage Tourism Marketing Council.



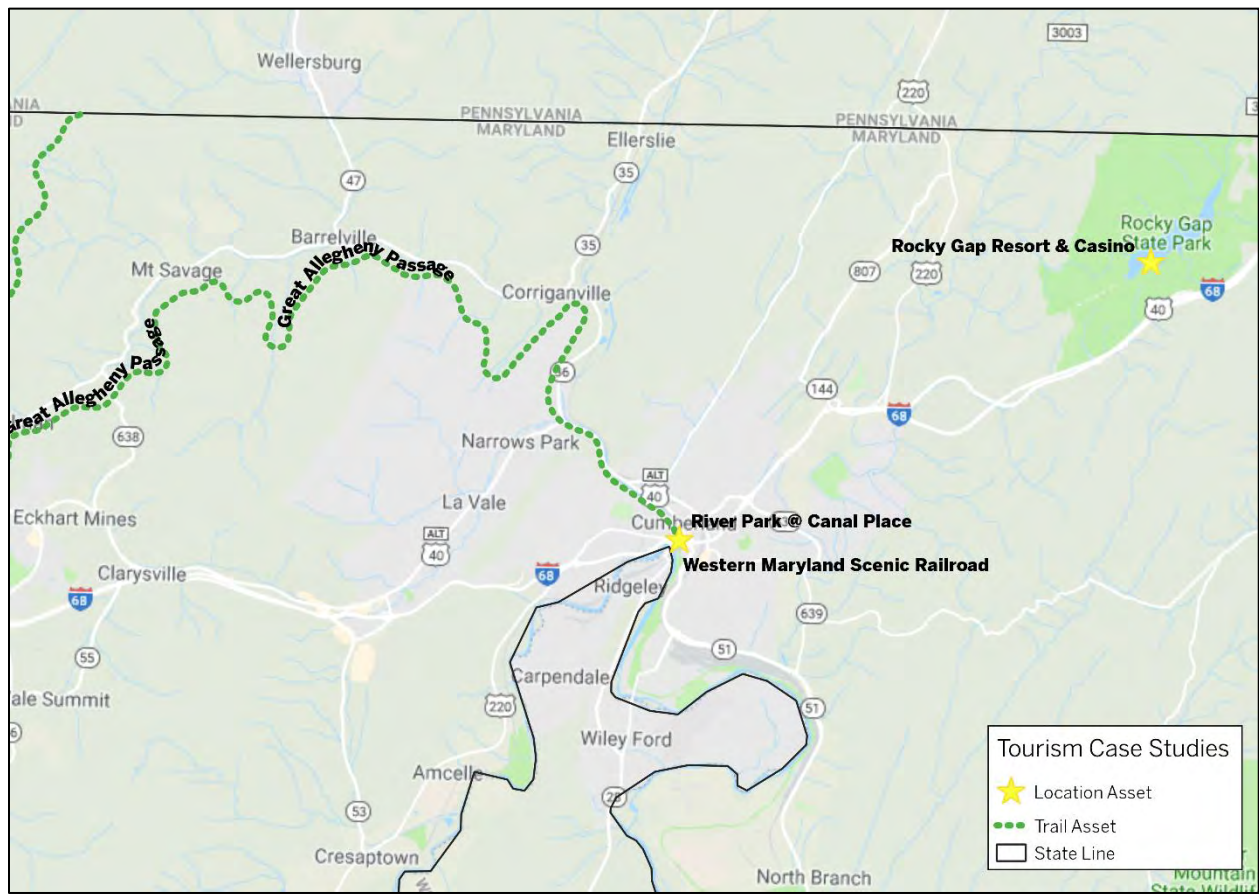
Beer Tourism is growing, and according to the Brewer’s Association, an average craft beer drinker visits 3.5 breweries near their homes and 2.5 breweries within two hours’ driving distance. Additionally, according to Mandala Research more than three-quarters of all leisure travelers are “Culinary Travelers,” or have participated in culinary activities on trips in the past three years (2013). About half of all leisure travelers travel to learn about or enjoy unique and memorable eating and drinking experiences, which has increased by 11% since 2006 according to Mandala Research (2013).

The culinary traveler category can be grouped into three categories:

- Deliberate (30%) - Culinary activities key or guiding reason for destination choice
- Opportunistic (26%) - Sought out culinary activities but not a factor in destination choice
- Accidental (19%) - Participated in culinary activities because they were available
- Unclassified (25%) - None of the above

CASE STUDY RESEARCH

The following case studies highlight Allegany County’s key tourism assets and provide examples of comparable assets in other tourism regions of the United States. By comparing Allegany’s unique assets and understanding some best practice examples of how other areas are leveraging their similar tourism products, Allegany County can look to build upon their existing product to better market the region to visitors.



Scenic Trains

**Allegany Asset:
Western Maryland Scenic Railroad**

Asset Type: Scenic Railroad
Annual Usership: 30,225 passengers
Length: 16 miles
Annual Economic Impact: Unknown

The Western Maryland Scenic Railroad (WMSR) offers scenic railroad excursions over a 16-mile course along the ex-Western Maryland Railway trackage between Cumberland and Frostburg, MD. The heritage railroad operates year-round and averages more than 30,000 riders per year.

Complementary to the route’s scenic beauty, WMSR offers a diversity of programming, including holiday-themed rides, murder mystery events, and unique, engineering-themed offerings such as the “Hands on the Throttle” program. WMSR has also created partnerships with local wineries and breweries to offer wine and beer tasting events. Peak season for the WMSR occurs between October and December, due in large part to fall foliage and the holiday season.

The WMSR is one of Allegany County’s key tourism assets, providing a unique, scenic heritage excursion experience between the County’s two urban hubs. By offering a variety of programs and events, the rail line is able to target a variety of tourist typologies, including heritage tourists and craft food and beverage tourists. The railroad maintains a robust marketing campaign, is featured in Allegany County tourism promotions, and typically draws visitors from up to 3 hours away.



Napa Valley Wine Train

Location: St. Helena, CA

Population: 6,154

Key Asset: Scenic/Themed Train

Length: 36 miles

Annual Visitors: 3.5 million visitors (110,000 annual train riders)

Annual Economic Impact: \$11.2 million



Nestled in the iconic Napa Valley region of California, the Napa Valley Wine Train is a 36-mile train loop based in St. Helena, CA. The train, which captures approximately 14% of the tourism market in the Napa Valley, provides a leading example for how scenic railroads and tourism agencies can take advantage of the burgeoning craft food and beverage tourism industry.

Key Characteristics

- Diversity of craft beverage/wine themed train rides
- Hop Train
- NYE Dinner Train
- Cuisine/use of local foods
- Tequila Train
- Partnership with local craft food, beverage, and wine organizations



Cumbres & Toltec Scenic Railroad

Location: Antonito, CO to Chama, NM

Asset: Scenic Railroad

Length: 64 miles

Annual Riders: 37,060

Estimated Annual Economic Impact: \$14.8 million

The Cumbres & Toltec Scenic Railroad operates between the rural towns of Antonito, CO and Chama, NM. The 64-mile ride was voted USA Today Readers' Choice #1 Scenic Railroad in 2016 and brings in an estimated \$14.8 million economic impact to the area annually.¹³

Programming & Events Around Asset:

- Fireman/Engineering Classes
- Santa Train
- Fourth of July Ride (Fireworks)
- Galloping Goose #5 (historic train brought in seasonally)
- Themed Rides (wildflowers/geology)

Key Characteristics:

- Diversifying programming by car
- Cultural/historical approach

¹³ 2014 BBC Research & Consulting Report

Key Implications of Scenic Train Case Studies

The Western Maryland Scenic Railroad route is significantly shorter than that of the two case studies outlined. However, WMSR still attracts a large number of visitors, only slightly less than the Cumbres & Toltec Scenic Railroad and less than a third of the Napa Valley Wine Train. However, the programming and themed rides that WMSR offers is in line with the key attractive elements of the other trains. Building upon the solid foundation, WMSR could expand its reach by creating increased connections to the historic and cultural assets along the route.

Trails

Allegany Asset: Great Allegheny Passage

Asset Type: Rail Trail
Annual Visitors: 300,000
Length: 150 miles
Annual Economic Impact: 10.2 million

The Great Allegheny Passage (GAP) is a long-distance rail trail that extends over 150 miles from Cumberland, MD to Pittsburgh, PA. The trail links with the C&O Tow Path, which connects to Washington, D.C. over an additional 184 miles. Allegany County contains approximately 21 miles of the GAP.

The GAP is largely unparalleled among other rail-trails. Similar long-distance trails such as the Katy or Paul Bunyan state trails stretch for over 100 miles but lack the trail town infrastructure and metropolitan connectivity (i.e. Baltimore/D.C.) present along the GAP. When combined with C&O Tow path, the GAP offers a unique, top-tier rail-trail experience.

Allegany County is uniquely positioned along the GAP. The county seat, Cumberland, acts as either the beginning or end point of the GAP as well as the midway point for the combined GAP and C&O route. It is estimated that Allegany County receives an annual economic impact of \$10.2 million from the GAP.



Outdoor Recreation

Potential Allegany Asset: River Park at Canal Place

Asset Type: Whitewater Park
Location: Along Potomac River, Canal Place Park

The River Park at Canal Place is a proposed whitewater park along the Potomac River in downtown Cumberland, MD. The River Park will be constructed as an addition to Canal Place Park, a 58.1-acre historic preservation park located at the confluence of Wills Creek and the Potomac River.

The proposed River Park would include five kayak white water features, five water access sites, a 3.2-mile river walk trail, bicycle station, walking pier connecting to the YMCA, and riverside green space. Construction of the River Park would coincide with water quality enhancement projects.

If developed, the River Park would be a significant outdoor recreation and tourism asset. As outlined in the following case studies, whitewater parks, river parks, and paddle trails developed across the U.S. provide significant annual economic impact to their communities.

Buena Vista, CO

Location: Colorado, Arkansas River

Asset: Scenic River

Population: 2,778

Buena Vista, CO is located along the Arkansas River. Buena Vista's whitewater park features five man-made whitewater structures as well as riverside beaches, play areas, fishing, a skate park, dog park, and network of hiking and biking trails totaling over 25 miles.



Key Characteristics:

- Hub of outdoor activity at park: hiking & biking trails, riverside 'beaches,' play areas, and fishing
- Downtown Connectivity: Whitewater park located within walking distance to South Main Downtown

Programming & Events Around Asset:

- Paddle Fest – variety of whitewater sport competitions
- Trail Races



Bend, Oregon

River: Deschutes River

Asset: Scenic River, Trail Network, Craft Beer Trail

Population: 91,122

Attracting approximately 2.5 million annual visitors, Bend, OR features a network of 30+ miles of trail and the Deschutes River, which runs adjacent to the downtown area. Though it is positioned as an outdoor recreation hub, Bend has also been dubbed the “Beer Capital of the USA,” and features the Bend Ale Trail – the largest beer trail in the West.

Key Characteristics:

- Interconnected trail network
- A network of rail beds led to trail development
- Whitewater Park connected to downtown (Old Mill District)
- Critical Mass of Craft Breweries/Brewpubs

Programming & Events Around Asset:

- Marathons/Trail Races
- Annual Bend Whitewater Festival – Kayak & SUP competitions



Outdoor recreation attractions include river and water features, trails, mountains, and other natural assets across the United States. Each year thousands of visitors travel in search of outdoor recreational activities and bring additional spending as customers of nearby local businesses. While the number of users does not directly translate to larger impacts, the spending patterns of typical visitors and local amenities contribute to an overall positive economic impact from tourism in each case. Ranging from 1,000 all the way up to 75,700 estimated annual user days, each case below represents potential additional tourism dollars and the resulting annual economic impact generated from additional spending.

River Tourism Case Studies and Economic Impact

Location	Key Attraction/Asset	Estimated Annual User Days	Estimated Additional Tourism Dollars Spent in Community	Estimated Overall Positive Annual Economic Impact
Golden, CO	Clear Creek	12,000 – 14,000	\$910K - \$1.1M	\$1.3M - \$2M
Breckenridge, CO	Blue River	1,200 – 2,300	\$220K - \$460K	\$400K - \$1.1M
Vail, CO	Gore Creek	1,000 – 2,300	\$3.5M - \$4M	\$4M
Saratoga/Warren County, NY	Sacandaga River	17,600 – 25,400	\$1.8M - \$2.8M	2.3M - \$3.7M
Kent, OH	Cuyahoga River	10,000 – 40,000	\$200K - \$800K	\$500K - \$1.7M
Steamboat, CO	Yampa River	75,700	\$4.9M	\$7.2M

Additionally, two examples of larger State Parks with trails as well as water access are included to demonstrate the potential of diverse outdoor recreational attractions. Both cases attract visitors that outnumber local residents to yield millions of additional economic activity in their respective regions.

State Park Case Studies and Economic Impact

Location	Key Assets	Population	Length	Annual Visitors	Infrastructure investment	Annual Economic Impact
Ohiopyle, PA	State Park, Whitewater rafting, GAP	59	7.5-mile section	250,000 (Ohiopyle)	N/A	\$30 million (State Park)
Columbus, GA	Whitewater Park	189,885	2.5 miles	1.8 million (30,000 visitors for Whitewater Park)	\$24.4 million	\$340 million

Lastly, water trails can bring visitors to local communities as long-distance travelers stop at various destinations along the path. The below economic impact studies examined the total impact of long-distance water trails in Pennsylvania, Southeast Michigan and the far Northeast. As shown below, the economic impact is more closely related to the number of annual users than to the overall length of the trail. Additionally, none of these trails match the impact of the only 2.5 long water park in Columbus, Georgia. This could indicate that activities and programming the water recreational feature should be a priority over length.



Water Trails and Economic Impact

Study	Length	Annual User	Annual Economic Impact
Pennsylvania Water Trails ¹⁴	489 miles	3,530	\$731,000
Huron River Water Trail (SE Michigan) ¹⁵	104 miles	103,000	\$50 million
Northern Forest Canoe Trail (NY, VT, NH, ME, QC) ¹⁶	740 miles	90,000	\$12 million

Key Implications of Outdoor Recreation Case Studies

As the development of the River Park at Canal Place continues, assessing the potential impact of the project becomes important to ensuring the best final product. As the case studies outlined above show, a key indicator of the economic impact of these outdoor recreation products is not necessarily length but the number of annual users. Marketing the River Park to potential visitor will be an important factor in its success. Additionally, the River Park’s connection to downtown Cumberland is a key asset allowing visitors to easily access other amenities and activities. Developing programming activities and special events is also important and will help draw additional visitors and users to the River Park and Allegany County.

Resorts & Casinos

Allegany Asset: Rocky Gap Resort & Casino	Asset Type: Resort & Casino Annual Visitors: 1 million
<p>Rocky Gap Resort & Casino is located 8.1 miles northeast of Cumberland, MD. The casino resort, which overlooks Lake Habeeb in Rocky Gap State Park, is a AAA 4-Diamond Award winning resort.</p> <p>Rocky Gap features 198 guest rooms and suites, a 24-hour casino (665 slot machines, 17 games tables), and an 18-hole Jack Nicklaus-designed golf course. The commercial attraction receives approximately 1 million visitors each year.</p> <p>The Maryland Gaming reported that, as of November 2018, Rocky Gap Casino accrued a gross VLT revenue of \$43.8 million and Table Games revenue of \$6.5 million for the 2018 calendar year. Rocky Gap Casino Resort reported that between 2014-2017, \$3 million of casino slot machine revenues had been contributed to a fund benefiting Allegany County. The majority of these funds were received by the Allegany College of Maryland. Other recipients include Frostburg State University, and Allegany County fire companies, among others.</p>	

¹⁴ <https://pecpa.org/wp-content/uploads/Water-Trails-Economic-Impact-Study.pdf>

¹⁵ <https://www.hrwc.org/wp-content/uploads/2014/03/HRWT%20Economic%20Impact%20Report.pdf>

¹⁶ <https://www.uvm.edu/~snrvtdc/NFCT/NFCTPamphletNF.pdf>



Lady Luck Casino at Nemacolin Resort

Location: Farmington, PA

Asset: Casino & Resort

Estimated # of Annual Visitors: 80,000

Facility Amenities: 600 slot machines, 28 table games, 2 x 18-hole golf courses, spa,

The Lady Luck Casino is located in Farmington (Wharton Township), PA, near several state game lands and Bear Run Nature Reserve. The resort casino reported \$2.4 million in slots revenue and nearly \$400,000 in table game revenue. The Pennsylvania Gaming Control Board oversees the PA gaming industry, which has an effective taxation rate of 55%, including State Tax (34%), Local Share Assessment (4%), Economic Development and Tourism Fund (5%), and Pennsylvania Race Horse Development Fund (approx. 12%). In 2016, Wharton Township received more than \$645,000 in slot game and table revenue through local share account allocations from Lady Luck Casino.

Casino Club at the Greenbrier Resort

Location: White Sulphur Springs, WV

Asset: Casino & Resort

Facility Amenities: 320 gaming machines, 35 table games, 5 x 18-hole golf course, Convention center, The Bunker, Spa

The Casino Club at the Greenbrier Resort is located in White Sulphur Springs, WV, near George Washington & Jefferson National Forest. The resort casino reported over \$4.8 million in gross gaming revenue in year 2015-2016. The state of West Virginia has a tax rate of 35 to 49% on adjusted gross gaming revenue.

Key Implications of Resorts and Casinos Case Studies

The Rocky Gap Resort and Casino is a big tourism asset for Allegany County attracting a significant number of visitors and providing funds for the County's development and growth. Its impact can be compared with other similar facilities in Pennsylvania and West Virginia which do not attract as many visitors or provide the same amount of tax dollars. The casino also attracts a high number of day users that do not stay at the resort. Attracting additional overnight visitors is a key component of growing the economic impact of tourism in Allegany County. Ensuring additional activities and amenities in proximity to the casino will encourage visitors to extend day trips into overnight stays.



CONCLUSION

The Background Report is designed to provide a baseline understanding of the current demographic and economic makeup of Allegany County in order to identify the areas in which the County can look to target economic growth. The above analysis looks at Allegany County through four key areas of focus: demographics, housing, economics, and tourism.

The demographic analysis identified key challenges including a declining population and a lack of younger residents that would make up a key component of the County's workforce for generations to come. Additionally, a low level of educational attainment presents some challenges.

The majority of housing in Allegany County is owner-occupied single-family detached. Housing in the County is extremely affordable compared to the rest of the state; however, much of the housing is aging with 44% built before 1950. The market for for-sale homes has tightened over the last few years with median listing price increasing by 25% since March 2017 and the number of days on market decreasing 64% since April 2017.

Employment in Allegany County has also decreased since 2001, although a handful of industries have seen growth, particularly those related to Healthcare and Furniture Manufacturing. Restaurants and Hospitals contribute to a large proportion of the jobs in Allegany County. The County's unique industries include specific manufacturing sectors related to furniture as well as Paper Mills. The concentration of this employment is in only a few firms, however, highlighting the challenge for increasing comprehensive economic growth.

Adding to the challenge of inclusive economic development is the concentration of occupations in the County. Many of the jobs in the County are Secretaries, Cashiers, Fast Food Workers, and Retail Salespersons. Registered Nurses are the highest paying top occupation and highlight the growing opportunity around healthcare.

Within manufacturing, there are a number of industries that Allegany County can work to attract based on regional strengths and supply chain gaps. These include some additional Furniture Manufacturing related industries as well as some related to Aerospace and Defense and Paper Mills.

Tourism is a major market in the State of Maryland, and Allegany County is well-situated to take advantage of its natural and built tourism assets. Based on hotel and motel tax revenue, the County has seen growth in tourism in recent years, although a minor slowdown occurred in 2017. There are few key markets of which Allegany County can take advantage including Cultural Heritage Tourism, Outdoor Recreation Tourism, and Craft Food and Beverage Tourism.

The County has a number of unique assets including the Great Allegheny Passage (GAP) Trail and the Chesapeake & Ohio (C&O) Tow Path, the Western Maryland Scenic Railroad, the Rocky Gap Resort and Casino, several state parks, and historic downtowns in Cumberland and Frostburg. Building out these assets, marketing them to a wider community, as well as identifying growth areas related to the River Park at Canal Place will help grow tourism as a key component of the Allegany County economy.



Appendix B: Community Engagement Report



FOCUS GROUP & INTERVIEW SUMMARY

In order to gather feedback and insights from interested stakeholders in the community, four focus groups were conducted on the topics of Infrastructure and Industry; Tourism; Education and Workforce; and Housing. These focus groups were supplemented with interviews with individuals that were unable to attend the meetings. The following summarizes the key themes and information that were uncovered from each group.

INFRASTRUCTURE AND INDUSTRY

Utilities

A key concern for the County and the major cities within the County is the age of the existing infrastructure. As Allegany County is an older area of the country, much of the infrastructure, particularly water and sewer systems are in need of investment. In the past, many areas of the County have had a combined stormwater and wastewater system. This system can cause overflow issues in the Potomac River during heavy rain periods.

The County and the City of Frostburg have invested in slowly separating their systems over the last few years. The City of Cumberland recently received funding for a storage tank that will help eliminate some of the overflow issues but will also likely be investing in separating the systems in the north and west areas of the City in the future.

Overall, the County's water system is in good condition, although there are aged and clay pipes that need replacing. However, there are areas of the County where additional infrastructure improvements are needed. The wastewater treatment plant near the Barton Business Park is nearly at capacity. Therefore, the park cannot currently support a high-water user. However, the North Branch Potomac Industrial Park is currently capable of supporting a high-water user, and there are currently plans to build a new pump station that will enable even higher flows to the park.

Focus group participants felt that stringent environmental regulations in Maryland, particularly related to sewage, may be creating some barriers and challenges for rehabilitation and maintenance of existing infrastructure. Additional potential impacts of these regulations on development are mentioned in later sections of this focus group and interview summary.

The focus group participants also felt that the County has competitive broadband access, which differs significantly from public perception as discussed in other sections of the report. However, with a growth in the need for fiber, more infrastructure is being put in place, especially in areas south of Cumberland. One of the challenges of adding this additional infrastructure has been navigating the relationship with the CSX-owned railroad in order to place lines across railroad tracks.

Transportation

One of the major transportation issues discussed during the focus group was the bottleneck in Cresaptown as shown in the Figure 1 on the following page. This area is a growth corridor and contains American Woodmark, the Barton Business Park, Northrop Grumman, and the Western and North Branch Correctional Institutions. The proximity of major employers in this area has created traffic bottlenecks during shift changes. The state is currently studying the US-220



Corridor and considering a bypass, but that solution would be long-term and costly. They are focusing on local improvements that could alleviate the issue, including adding turn lanes. Another recommendation included working with the employers to better stagger shift changes.

Focus group participants also discussed the Canal Parkway which leads

to the Greater Cumberland Airport. This road does not allow trucks, which is a challenge for additional infrastructure development near the airport. However, the right of way between the CSX railroad and the river is not wide enough to accommodate additional width for the road so a solution for this issue may not be feasible.

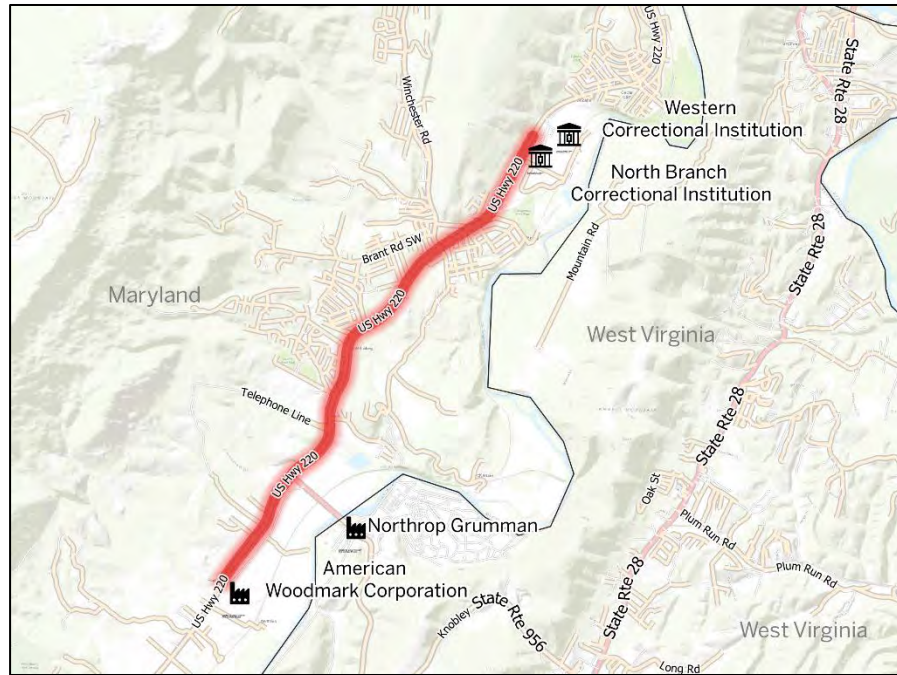
One focus group participant recommended including infrastructure issues as a discussion item when redevelopment projects are proposed. One example mentioned was the Liberty Liquors on National Highway, which has a bad entrance/exit that is difficult to navigate. This infrastructure issue could have been addressed before Liberty Liquors was built in order to ensure easy access to the store. Another example discussed was the McDonald's in Bel-Air that some participants agreed should have an access or frontage road. The participants agreed that discussions of potential infrastructure improvements should be made during the preapplication process for new projects in order to potentially identify and resolve these problems ahead of time.

Another major infrastructure challenge is in the City of Cumberland where three bridges that go over the railroad have been closed recently due to maintenance needs. The City is in the process of getting some funding from a federal program to replace and repair these bridges. The first priorities will be Baltimore Street to Green Street going to downtown and Cumberland Street.

Cumberland is also investing in road repair efforts by partnering with Columbia Gas to share costs. Columbia Gas is replacing some pipes and moving to plastic from steel. The five-year plan will allow Cumberland to repave roads at the same time as Columbia Gas is replacing pipes, minimizing traffic disruptions and project costs.

While there is significant historic rail infrastructure in the County, Berry Plastics is the only company that currently uses the railroad for shipping. Additionally, there may be some coal shipments passing through the County, and the recycler on Kelly Road might ship some scrap

Figure 1: Map of Transportation Bottleneck



materials. Overall, the County does not have any major manufacturers that are producing enough quantity to ship by rail. Also, many of the siderails in the County were removed and scrapped for metals in recent years, and most of the existing siderails are privately-owned. There is one siderail in George's Creek that is currently open.

Current Development Projects

Baltimore Street in Cumberland is planned for a major infrastructure project. Currently, the street is closed to vehicle traffic as a pedestrian-only area, and a few local restaurants offer patio seating. Additionally, there are some vacant buildings, including the BB&T Bank building and the M&T Bank building. The major infrastructure project currently under development involves opening up the road to one-way traffic, improving infrastructure, including a fire protection system to allow second-floor rentals, and upgrading the broadband to allow for high-tech office users. This project is currently in the design stage.

The Rolling Mill project involves the removal of some blighted housing south of I-68 and east of Park Street in Cumberland. The controversial project has resulted in some housing demolition. The City plans to sell to the developer who will negotiate with remaining homeowners and/or build around their homes. The mixed-use project would involve restaurants, shopping, and a hotel.

Potential Development Areas

Exits 33 and 34 off I-68 are potential growth areas with a lot of greenfield acreage for development. This area includes the ABC Business Park, which is located off Exit 33 near Frostburg State University. The ABC Business Park has about 60,000 square feet of existing space and currently houses a call center. The facility has been part of discussions for the potential drone research facility in partnership with the airport. The George's Creek area was also identified as a good development opportunity and growth area.

TOURISM

Anchor Products

During the first section of the focus group, participants were asked to name some of the County's major anchor tourism products. The list of responses with descriptions is shown in Table 1.



Table 1: Anchor Tourism Products in Allegany County

Product	Description
Great Allegheny Passage (GAP) Trail	<i>150-mile rail trail that runs from Cumberland through Frostburg to Pittsburgh</i>
C&O Towpath	<i>185-mile trail running along the Chesapeake & Ohio Canal from Cumberland to Washington, D.C.</i>
Rocky Gap State Park	<i>3,000 acres with public recreation, scenic overlooks, and a day use area with public swimming areas</i>
Rocky Gap Casino Resort	<i>Casino and resort located east of Cumberland and north of I-68 in the Rocky Gap State Park</i>
Historic Sites and Buildings	<i>Multiple sites throughout Allegany County</i>
Green Ridge State Park	<i>47,500 acres primarily used for hunting, off-road driving and camping</i>
Western Maryland Scenic Railroad	<i>Heritage Train that travels through scenic areas and stops in Frostburg and Cumberland</i>
Main Streets (Cumberland & Frostburg)	<i>Baltimore Street in Cumberland and Main Street in Frostburg offer a number of restaurants and retail shops.</i>

Products with Potential for Growth

Participants were asked to name the tourism products with the greatest potential for growth. This included products that could benefit from additional marketing and/or further development.

There are a number of challenges with the existing main streets in Cumberland and Frostburg. However, they both offer a lot of potential. In particular, the Baltimore Street gateway from the GAP trail needs improvements to connect visitors to Downtown activities. There is not a clear path from Canal Place and the GAP and C&O trails to Baltimore Street. Currently, there is a small area plan in progress to improve the overall gateway at Canal Place.

The City of Cumberland could work better with the Downtown Business Associations to ensure that businesses are open on weekends and evenings to serve more clients. A new brewer opening soon in the ground floor of the Footer Dye Works building will provide a new amenity to the Downtown Cumberland area.

Main Street in Frostburg also needs gateway improvements. While they have installed some signage, some participants felt it was still not providing clear wayfinding. The connection to Main Street for key visitors is difficult to navigate. There is a large hill between the GAP trail and the depot area (where the Western Maryland Scenic Railroad stops) and another large hill from the depot to Main Street. Participants mentioned engaging with the Western Maryland Scenic Railroad to work on extending the duration of train stops in Frostburg. Currently, the train only



stops for an hour, which does not allow enough time for people to get food and shop in Frostburg’s downtown area.

Participants also discussed Rocky Gap Casino as a place for growth. However, there is a need for additional activities and programming to support growth at the Casino. A recommended new park is included in the New Products listed below.

Additional focus group discussion involved the trails in Allegany County which have a massive appeal but have not been marketed nationally. The trails present a growth opportunity for further development in addition to marketing efforts. Additionally, the Canal Place area is a Certified Heritage Area allowing for preservation of nearby historic and heritage assets. The Heritage Area has been expanded to include portions of Frostburg, and there is a plan for continued expansion.

New Products

Focus group participants were also asked to describe the missing products or new products that could help attract additional visitors to the County. Suggested tourism products are listed below.

Table 2: Potential New Tourism Products for Allegany County

Product	Description
River Product	<i>There are currently studies and plans for the Canal Place area near the intersection of the GAP and Towpath trails that would create access to the river for recreational activities. During the focus groups, there was debate on what the actual river access would entail and whether the river would be safe for use.</i>
Park near the Rocky Gap Casino	<i>Focus group participants discussed the need for a recreational park near the Casino apart from the existing Rocky Gap State Park recreational area that is already busy during daytime use.</i>
Green Ridge State Park	<i>Green Ridge State Park is currently underused with many visitors using the park for hunting and off-road driving. In the past there have been conversations about having ATVs or snowmobiles, but no action has taken place. The administration for the park currently focuses on land use management and should form partnerships in order to promote the park to residents and visitors. There is currently a national trail in the park that is not well marketed. Other activities to promote include hiking, river access, primitive camping, and off-road vehicle driving with scenic overlooks.</i>
Trolley and Downtown Tours	<i>Participants suggested Coal Country Tours and tours of Heritage Trails as activities to leverage the historic assets in the community.</i>
Wills Mountain	<i>Many people use this area for unsanctioned hikes and rock climbing, but there is an opportunity to develop as an official hiking and/or mountain biking area.</i>



Relationships

Most of the participants agreed that they needed to focus on building up existing assets rather than reinventing what they already have. They should put a focus on working together rather than marketing things alone. Participants also discussed having a tourism leadership group that meets on a regular basis to move projects forward.

There was broad agreement regarding the need to improve the perception of tourism amongst elected officials in the County. There has been progress made in this space, but more still needs to be done.

There are many economic development silos in the region with a number of organizations that need to have defined roles through the plan. Some discussion revolved around whether all of these organizations need to exist and whether they all were doing unique activities.

Focus group participants also discussed the need to work on promoting tourism activities to residents and improving the overall perception of tourism and its economic impacts within the community.

EDUCATION AND WORKFORCE

Assets

The major educational assets in the County are the Allegany College of Maryland (ACM), Frostburg State University (FSU), and Allegany County Public Schools (ACPS).

Focus group participants felt there is a collaborative atmosphere between the educational institutions in the County, and the educational leaders often work together on projects. One example is the P-tech program, an early college program for high schoolers focused on cybersecurity. Through the program, students can earn an associate degree while in high school. The program is specifically designed to encourage low-income students to earn postsecondary degrees.

The relationship between ACM and FSU is positive. Enrollment for their dual credit program doubled last year. ACM has the largest physician assistant and nurse practitioner programs in the state. Students can now go to ACM for initial credits and then transfer to FSU in order to earn their Bachelor of Science in Nursing. Before this program nurses had to go out of the region, which made it less likely for the graduates to return to Allegany County for work.

All of the major educational leaders are part of the Chamber of Commerce Panel for Education, and they recently put together a Regional Development Plan for education that has an economic development focus. The school board also recently commissioned a study on fiber infrastructure in an effort to examine whether opportunities to work remotely for companies in major metropolitan areas could attract people to Allegany County who would rather live in a less urban setting.

ACM also has a good relationship with the County. ACM is moving its advanced manufacturing and welding classes to a new makerspace in a facility owned by the County. This advanced manufacturing program is a major asset for the County. When it started, there were only fifteen seats, and there is now a two-year wait list to get into the program. The program currently trains



CNC Machinists for Northrup Grumman. ACM is hoping to expand the program with a grant from the Department of Labor and the expansion into the new makerspace.

ACM is also home to the Western Maryland IT Center of Excellence, which has brought additional funding and recognition for the County. It is now the premier program in the state.

There is also a Youth Apprenticeship Program, which is a state-approved collaboration between local businesses and ACPS.

Leadership Allegany! Rising is another program offered through the Allegany County Chamber of Commerce that allows juniors to learn about the business opportunities that are available within the County.

Challenges

There are multiple groups within the County working on some of the same issues, and some alignment of priorities and initiatives needs to take place. Resources are thin, so collaboration is needed.

From a talent development standpoint, population loss and the low educational level in the County is a large concern, especially when it comes to STEM knowledge. There is a disconnect between what jobs are available and the existing workforce.

Housing is a key component of the workforce issue, as there is not adequate housing for college graduates. The County is also lacking the active night life and amenities needed to attract a younger population. There is also a lack of retail options, and many residents now shop online.

FSU has around 1,000 graduates a year, approximately 800 of which have lived in the community. However, not many of the students stay after graduation. Overall, 73% of FSU students come to the university from outside of the County. Additionally, 48% of ACM come from outside of the County. This may make it more difficult to attract graduates to stay in the region.

The state provides some tuition supplements for students from outside of Allegany County, but the geography of the County makes it difficult as there are many students in the region that live in West Virginia or Pennsylvania. FSU currently offers tuition discounts to those students, and ACM is working on legislation that would allow them to offer similar discounts.

Currently West Virginia University in Morgantown is a key competitor to FSU for workforce. Additionally, residents in Allegany County go to Morgantown to shop. Focus group participants discussed whether the proximity to Morgantown could be a benefit for Allegany County rather than solely competition.

Another key challenge discussed is the lack of passenger air service in the County.

Key workforce shortages are in engineering, skilled trades, and health care.

Overall, focus group attendees felt that there needs to be a change in perception. Many community members do not have a positive vision for their future nor for the future of Allegany County. Some people view the loss of the manufacturing industry as a failure and are not able to see the assets that still exist and can be built upon.



Projects and Priorities

ACM and FSU are starting to collaborate more and mentioned the potential of sharing faculty and staff to help with a workforce shortage.

A key priority is increasing entrepreneurship and attracting and retaining a talented workforce. One respondent mentioned using the idea of the “rural creative class” to attract residents with an entrepreneurial spirit that can appreciate the outdoor recreational activities in the County. With the growth of telecommuting, focus group participants thought the County could look to bring workers from the nearby metropolitan hubs that could work remotely. The affordability of housing could be an asset in this effort.

In addition to attracting new workers, participants mentioned eliminating gaps between socioeconomic groups as a priority. Participants believe the community needs to focus on increasing the number of students who attend college after high school graduation. An internal marketing scheme aimed at providing students with a vision of the future was mentioned as well as the “Growth Mindset” and “Self-Authoring Programs.”

HOUSING

Current Housing Market

Most homes in Allegany County are multi-level, two-story buildings with bedrooms above the living area. However, many of the homes are older and in poor condition.

According to a focus group participant in the real estate market, at the time of the meeting, there were 435 single family homes on the market. In the last year, there had been a 3% increase in housing values, which was similar to surrounding counties. However, Washington County had seen the most growth at 20%.

Focus group participants suggested the housing value increases are likely due to low inventory. The existing housing stock is mostly 30 years or older, and houses that are less than 20 years old are hard to find. This is making it difficult to find quality homes on the for-sale housing market and driving up prices.

There are a few individuals in the County who flip old houses and put them back on the market, but there is not enough of this activity taking place to counter issues of blight.

Additionally, construction costs in the County are above what the market rate can manage. Construction supplies are generally sourced from urban areas, but with much lower housing prices in Allegany County, new projects are not financially feasible.

In the last year, there were approximately 25 building permits. However, many of the homes are built in the outer parts of the County where families will build additional homes for related family members on large properties. New houses are typically in the upper \$200,000 range.

Another key market challenge involves new housing types and models. A recent project with a Homeowners’ Association did not perform well as the model is not common in the County, and many residents were wary of the subsequent fees.



Rentals

Most of the rental market units in the County are older. Renters are sometimes hard to find, and the best renters tend to be sensitive about the overall quality of the units. Many renters for higher cost units can afford to purchase homes due to the low cost of for-sale units. However, with the low appreciation of homes in the County, it might make sense for more individuals to rent. The quality of rental units is still a challenge.

Landlords in the County struggle to balance getting the highest value for their units and having all their units occupied. Whenever maintenance costs are added, many landlords are doing well to break even. This has led to the poor condition and disrepair of many rental units in the County. Additionally, water, sewer, and trash costs have gone up. Several private trash providers have recently stopped service increasing costs in the County. While the cities of Cumberland and Frostburg currently offer trash pickup, the County does not.

In the downtown areas of the major cities in the County, many rental units do not have dedicated parking, which is a challenge for renting many of these units. Participants estimated the average rent for units in the County is between \$500-\$700, but there are some units priced over \$1,000.

Shortages

Focus group participants felt that there is a shortage of housing in the County aimed at younger residents and senior citizens. Several participants mentioned the need for townhouses and homes with a no maintenance model, in particular market-rate units of this type. Cumberland Housing Group recently developed 38 units of this type, but residents must make less than 125% of the median income, and there were not a lot of people in the community who qualified.

Blight Challenge

The significant blight challenge in the County was discussed in depth, including potential solutions for tackling the issue. A recent study identified 500 blighted properties within the City of Cumberland. A key contributing factor to the blight challenge is the cost of demolition, estimated at around \$15,000 per home. Current regulations require that homes undergo a historic analysis and an environmental study, contributing to this cost. Additionally, many homes have asbestos and/or lead paint, which can be very costly to contain during demolition. Recently, two homes on Virginia Avenue were torn down, but the cost of rebuilding after demolition was prohibitive.

Focus group participants discussed the concern that there is too much housing in the County, particularly in the City of Cumberland. As such, developing additional housing might only increase the blight as people vacate old housing. Many participants agreed that Cumberland needs a master plan that identifies target areas of the City for redevelopment. This plan could help build community support and create consumer confidence in the future of the housing market. There is a need for a program to help revitalize older homes because people currently cannot afford the repairs. The current County and/or City programs require that a lien be put on the property to provide funds. An existing program called Nails is funded by United Way and staffed by volunteers. They provide home repairs for people making 80% of the median income. However, they do not repair roofs, a key need in the County.



PUBLIC VISIONING SESSIONS

Two public visioning sessions were held to allow community members to express their preferences, identify opportunities and challenges for the County, and provide general feedback on the Economic Development Strategic Plan. The public sessions featured four activity tables related to the following topics:

- Housing;
- Industry;
- Infrastructure; and
- Tourism.

Community members were asked to participate in activities at each table individually during an hour-long open session. Following the activity sessions, a panel featuring economic development professionals and a representative from the business community was held to discuss the main findings that arose from the activities and some ways the County and its communities are trying to address relevant issues. The following section describes the activities and feedback received from community members at each table.



HOUSING

Key Findings

- 1) Most residents would prefer living in single-family homes (56%), followed by townhomes (23%) and apartments with a bedroom (21%).
- 2) The cities of Cumberland and Frostburg are key areas in need of additional housing and/or redevelopment. Blight is a significant issue within both cities.
- 3) Residents desire unique approaches for developing additional housing for the elderly and young professionals.

Housing Preference Demonstration

Using ballots, attendees were asked to identify the type of housing they would most prefer to live in. Participants could select more than one type of housing. In total, 39 ballots were submitted. The majority of respondents expressed interest in single family homes, followed by townhomes and apartments (with a bedroom). Through additional comments and discussion with



community members, some major themes emerged across both sessions.

- Housing for the elderly and young professionals that offers property maintenance (including horizontal co-ownership developments) is needed within the County.
- Housing options for middle-income residents are limited.
- Housing repairs are needed for residents with underwater mortgages.
- There is an overabundance of aged structures and student housing leaving fewer housing options for young professionals and faculty.
- Residents recommended rent-to-own initiatives to increase homeownership.
- One resident recommended establishing a Community Land Trust.



Table 3: What type of home would you prefer? (39 Responses)

Housing Type	Total Responses	Share of Total (%)
Single Family Home	22	56%
Townhome	9	23%
Apartment (with bedroom)	8	21%
Condominium	5	13%
Semi-Detached Home	4	10%
Studio Apartment	3	8%
Duplex	2	5%
Mobile Home	0	0%

Where are the Issues?

Residents were also asked to use a county map to identify areas where additional resources and a focus on housing are crucial to the County's economic development goals. As shown in the maps below, most residents identified the cities of Cumberland and Frostburg as in need of housing or redevelopment. Additionally, one resident identified the area of Bel Air, one identified the far southwest area of the County, and one identified an area near Corriganville.

Figure 3: Where are the housing issues? Cumberland

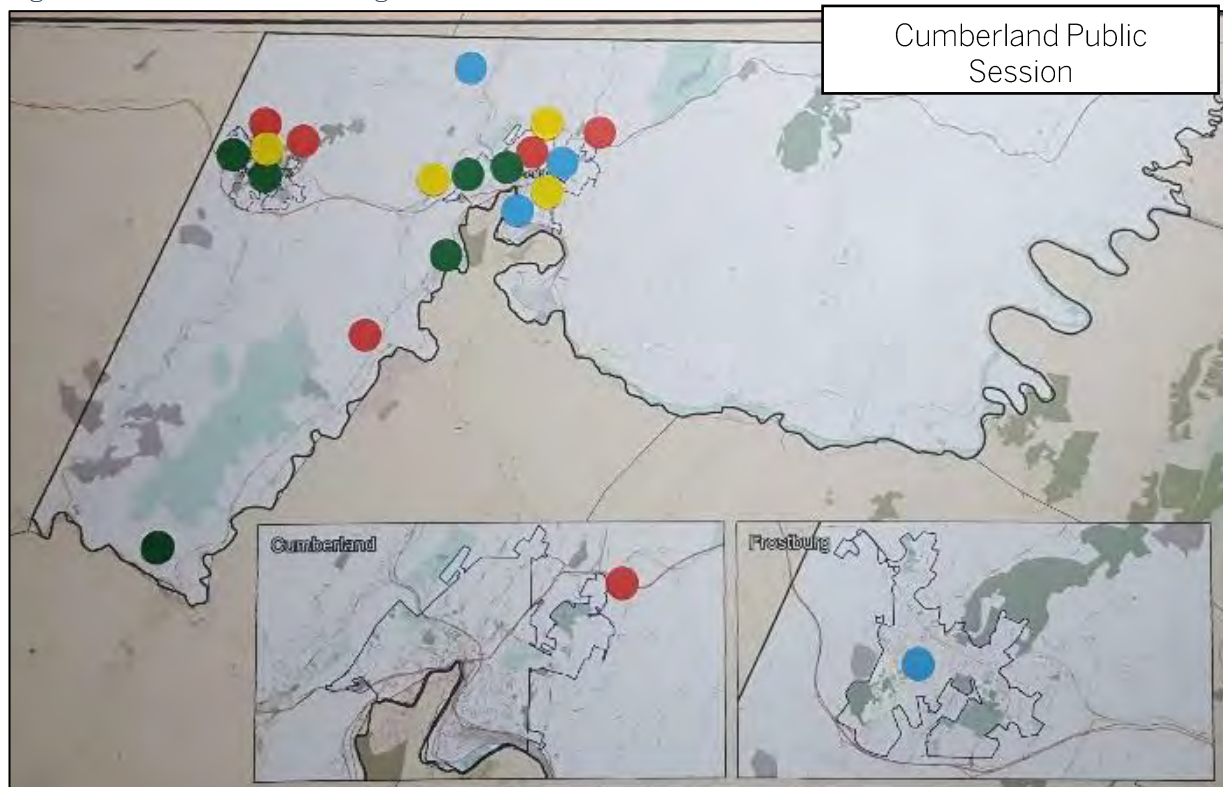
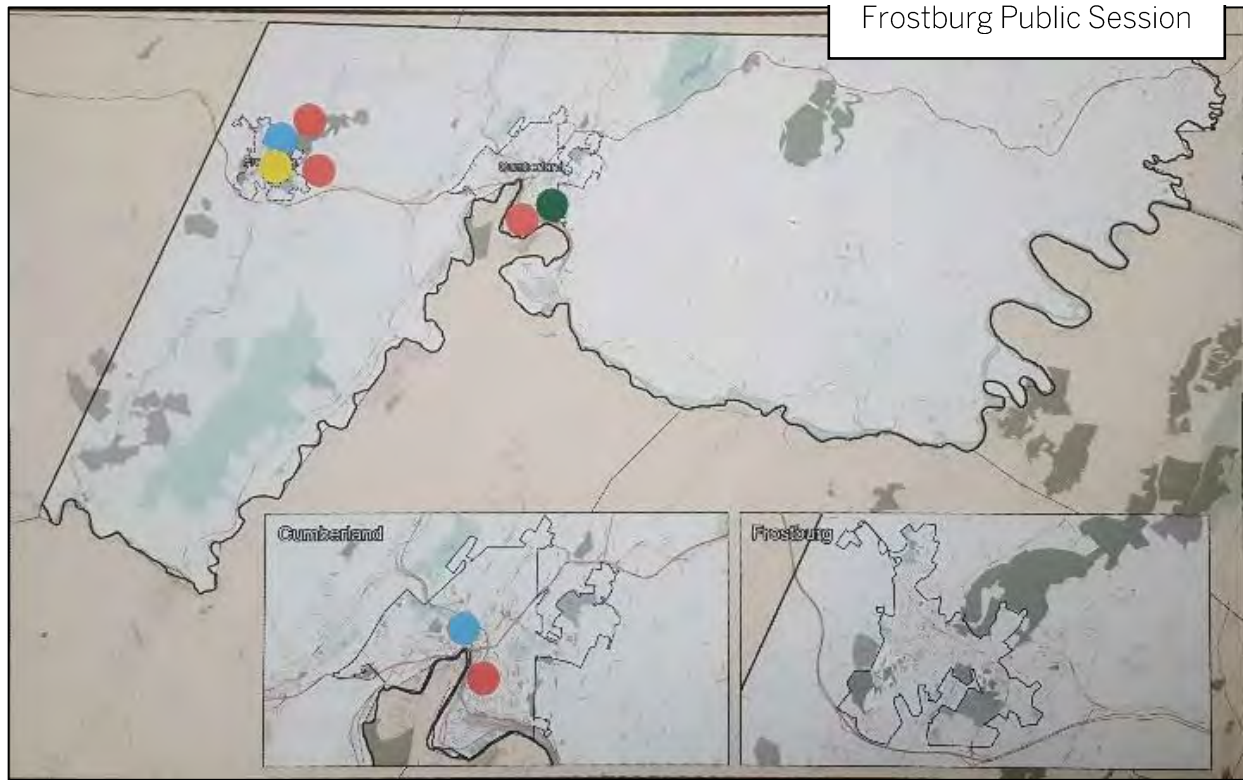


Figure 4: Where are the housing issues? Frostburg



During the second visioning session in Frostburg, residents used the following color codes to indicate specific issues. The results shown in the second map above indicated that blight/aged housing in the cities of Cumberland and Frostburg are the key issues.

Blight/Aged Housing	●
Lack of Housing	●
Affordability	●
Vacancy	●



INDUSTRY

Key Findings

- 1) 73% of residents identified IT, Informatics & Information Communication as the top industry opportunity in the County.
- 2) Other top opportunities are Tourism (68%) and Healthcare (54%).
- 3) Workforce (68% of respondents) was identified as the top challenge for businesses. The other top challenges were Infrastructure (46%) and Adequate Housing & Amenities (46%).

Top Opportunities



At the Industry table, residents were asked to identify the top industry opportunities in Allegany County. The top results were IT, Informatics, & Information Communication Technology (73%), Tourism (68%), and Healthcare (54%). These three industries were rated as opportunities for economic development by over 50% of respondents. Free-response comments

identified virtual work training and development opportunities in communication, herbal product production, digital realty, and the use of the airport as a training center for unmanned aerial vehicles (UAVs). One specific example included an IT Center for Excellence.

Based on free-response comments for this activity, residents perceive that one of the major impediments to industry opportunities is Allegany County’s ability to attract and retain talent in key sectors due to a lack of amenities. Individual responses recommended additional facilities for sports and recreation, housing improvements, renewable energy, and high-speed internet. High-speed internet was also listed as an asset that would sustain local business and allow for outsourcing. Other actionable suggestions included utilizing the hospital as a hub, tuition programs for ACM, and connecting healthcare to FSU/ACM programs.



Table 4: What are the top industry opportunities for Allegany County? (37 Responses)

Industry	Total Responses	Share of Total (%)
IT, Informatics, & Information Communication Technology	27	73%
Tourism	25	68%
Healthcare	20	54%
Advanced Manufacturing	11	30%
Biotechnology	9	24%
Retail	6	16%
Finance & Insurance	5	14%
Other		0%

Top Challenges

TOP CHALLENGES

What are the top challenges to expand or attract new businesses to the County?



Existing Workforce



Infrastructure



Market Access



Access to Capital



Adequate Sites & Buildings



Education & Training



Regulations



Adequate Housing & Amenities

Residents were asked to identify the top challenges to expand or attract new business to the County. Workforce was identified as the top challenge with 68% of respondents. The other top challenges identified were infrastructure (46%), Adequate Housing & Amenities (46%), and Education & Training (35%).

Table 5: What are the top challenges to expanding or attracting new businesses? (37 Responses)

	Total Responses	Share of Total (%)
Existing Workforce	25	68%
Infrastructure	17	46%
Adequate Housing & Amenities	17	46%
Education & Training	13	35%
Access to Capital	10	27%
Market Access	7	19%
Adequate Sites & Buildings	7	19%
Regulations	7	19%



Free-response comments identified the following challenges to expanding and attracting new businesses to Allegany County:

- Lack of appropriate housing and recreational facilities;
- High taxes and a lack of tax incentives to attract new businesses in Allegany County;
- Lack of planning resources for new businesses;
- Poor choices for high-speed internet provider; and
- Poorly maintained buildings, housing, and architecture in need of upgrades which negatively impacts their price and desirability.

Some free-response comments suggested potential opportunities. A couple of comments indicated a gap in businesses providing services that meet the needs of a growing diverse population, particularly the African American student population at FSU. By providing these services in Allegany County, the County can encourage students to stay in the County during weekends or school breaks.

Other opportunities submitted included:

- Recruiting a growing population of professional telecommuters given the proximity to many nearby larger markets in Washington D.C., Philadelphia, and Baltimore;
- Developing training centers for wind turbine inspection; and
- Increasing support for entrepreneurial activities in the County such as microfinancing to encourage bottom-up economic development.

Overall, the comments indicated a feeling that Allegany County has multiple assets that are either underutilized, not well-maintained, or in need of additional support to expand and capture new business opportunities. An inability to identify and market Allegany's competitive advantages within the region makes it difficult to attract new businesses. Therefore, the County should focus on supporting the expansion of existing businesses in order to encourage economic growth. Additional focus on marketing educational opportunities and identifying public or regional development funds were listed as potential action items.



INFRASTRUCTURE

Key Findings

- 1) Broadband is the top infrastructure need identified by residents, particularly better access to multiple options and more affordability.
- 2) Transportation, particularly airports and public transit, was another priority concern.
- 3) Transportation issues exist within the cities of Cumberland and Frostburg. However, the key broadband issues exist outside of the cities.

Infrastructure Needs

INFRASTRUCTURE NEEDS

Which are the most critical infrastructure issues affecting the potential of Allegany County?

 Sewer	 Water	 Traffic	 Highways
 Railways	 Airports	 Broadband	 Asset Management

At the Infrastructure table, residents were asked to identify the most critical infrastructure needs affecting the potential growth in Allegany County.

Representing a total of 65% of those responding to the activity, broadband internet was identified as the largest impediment to Allegany County's economic

development. Public discussion and individual feedback during the activities also emphasized this point, which is especially relevant given simultaneous discussions around telecommuting, the training and support of a modern workforce, and the potential attraction of technology heavy businesses to Allegany County. In particular, continued discussion emphasized the lack of providers and price as key components of broadband service lacking in the County.

Airport transportation was the second most frequently chosen challenge for Allegany County's infrastructure. Many free-response comments noted the need for local commuter air service, which currently does not exist within the County. Other free-response comments focused on the lack of transit options. Additional service was requested in order to connect more points and destinations within the County, particularly between Cumberland and Frostburg. Residents stated that existing public transit options were unsuitable, infrequent, and unreliable. Additionally, one comment mentioned the need for more bicycle connectivity and pedestrian safety.



Table 6: Which are the most critical infrastructure issues affecting the potential of Allegany County? (31 Responses)

Topic	Total Responses	Share of Total (%)
Broadband	20	65%
Airports	13	42%
Sewer	6	19%
Asset Management	6	19%
Water	5	16%
Railways	5	16%
Highways	4	13%
Traffic	1	3%

Top Challenges

Residents were asked to use color coded stickers to identify areas with key infrastructure issues in the County. The legend to the right shows the categories associated with the stickers for infrastructure issues. The majority of residents identified issues in and around Cumberland, with most issues being either transportation or broadband related. In some parts of the County residents cited poor cell service as a recurring issue as well. The two responses related to sewage issues are in downtown Cumberland.

Sewer	●
Water	●
Transportation	●
Broadband	●

Figure 5: Where are the infrastructure issues? Cumberland

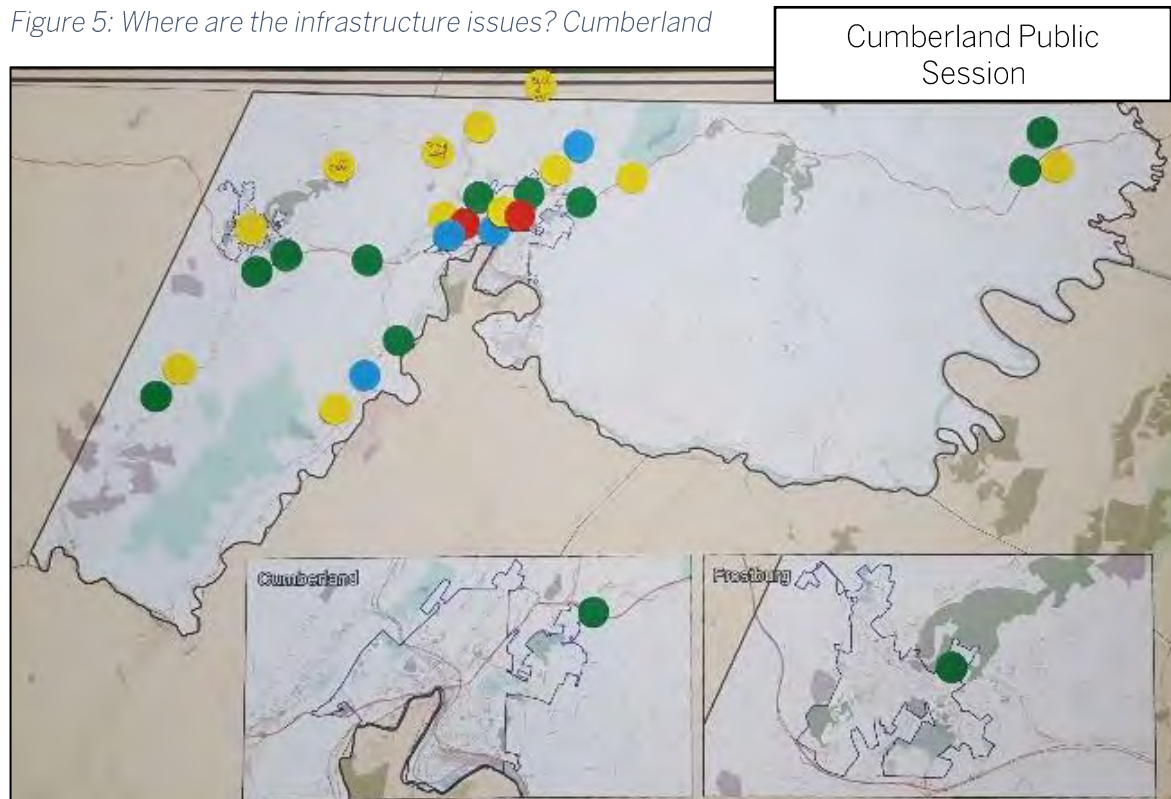
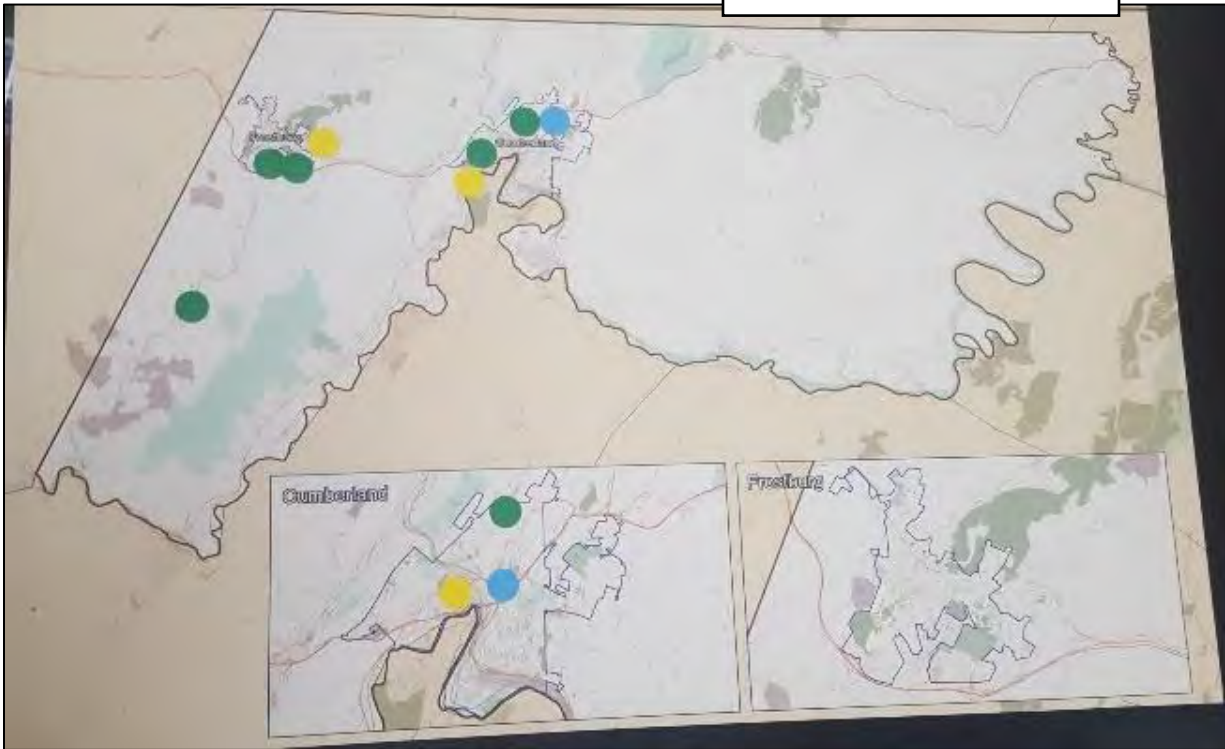


Figure 6: Where are the Infrastructure Issues? Frostburg

Frostburg Public Session



TOURISM

Key Findings:

- 1) Restaurants and Family Activities were identified as the top items lacking for tourists in Allegany County, each receiving 32% of votes.
- 2) Residents also identified a lack of marketing of existing assets as a challenge to growing the tourism industry.
- 3) The GAP Trail, Rocky Gap Resort & Casino, and Downtown Cumberland were popular recommendations for tourists to visit.

What's Lacking?

WHAT'S LACKING?

As a tourist in the County, tell us what's lacking to complete your experience.

- Restaurant
- Brewery
- Winery
- Nice Hotel
- Boutique Hotel
- Bars & Nightlife
- Canoe & Kayak Livery
- Mountain Biking
- Amusement
- Family Activities

Residents were asked to identify the tourism assets currently lacking within the community. Top identified assets were Restaurants and Family Activities, each receiving 32% of votes.

Through free-response comments, residents suggested that there may be a good mix of tourist attractions in the

County but that better marketing is needed to both residents and visitors. One resident mentioned that biking is a potential activity in Allegany County but was unsure of places to do so.

Overall, the County could benefit from stronger marketing campaigns advertising local trails for biking. Additional signage, staffing, and upkeep would improve the community's opinion of key tourism assets including natural assets such as Rocky Gap State Park and Dan's Rock.



Table 7: As a tourist in the County, tell us what's lacking to complete your experience? (37 Responses)

	Total Responses	Share of Total (%)
Restaurants	12	32%
Family Activities	12	32%
Canoe & Kayak Livery	11	30%
Amusement	11	30%
Boutique Hotel	10	27%
Brewery	9	24%
Winery	7	19%
Bars & Nightlife	7	19%
Mountain Biking	5	14%
Nice Hotel	3	8%

Below are additional write-in comments provided during this activity.

Food/Drink:

- Coffee shops;
- Diverse restaurants (Indian, Middle Eastern, Aussie, Peruvian, Syrian, German);
- More wineries;
- High-end restaurants;
- Restaurants open Mondays and Sundays.

Entertainment:

- More bars and nightlife options;
- Dancing locations without alcohol for socializing;
- 18+ dance club targeting FSU students.

Family Activities:

- Museum focusing on early American West;
- Park with rides for children;
- Adequate public library funding.

Recreation:

- Road cycling;
- Indoor swimming pools;
- General recreation facilities;
- Manmade creek (proposal submitted for town creek lake);
- Sports tourism;
- Trail development and signage for biking;
- Hang-gliding and ziplining;
- Rocky Gap Park;
- Dan's Rock.

Events:

- Bike race similar to Westchester, PA;
- Local restaurant fair.

Services:











- Train to DC Metro;
- Convention Center;
- Retail.



Play Host

PLAY HOST

Using the categories below, tell a tourist where they should visit for the best experience.

				
Restaurant	Brewery	Winery	Nice Hotel	Boutique Hotel
				
Bars & Nightlife	Canoe & Kayak Livery	Mountain Biking	Amusement	Family Activities

Residents were asked to identify places where they would suggest tourists in Allegany County to visit in a number of key tourism related categories. Top responses included:

- Restaurant: Ristorante Ottaviani
- Amusement Activities: Delfest
- Hiking: The Great Allegheny Passage (GAP) Trail and Rocky Gap State Park
- Winery: The Toasted Goat
- Bars and Nightlife: Dante's and Rocky Gap Casino
- Mountain Biking: GAP Trail
- Historic & Sites: Downtown Cumberland, MD, George Washington's Headquarters, Washington Street in Cumberland, MD
- Canoe and Kayak Livery: Rocky Gap State Park
- Family Activities: Rocky Gap State Park/Beach
- Brewery: 1812 Brewery

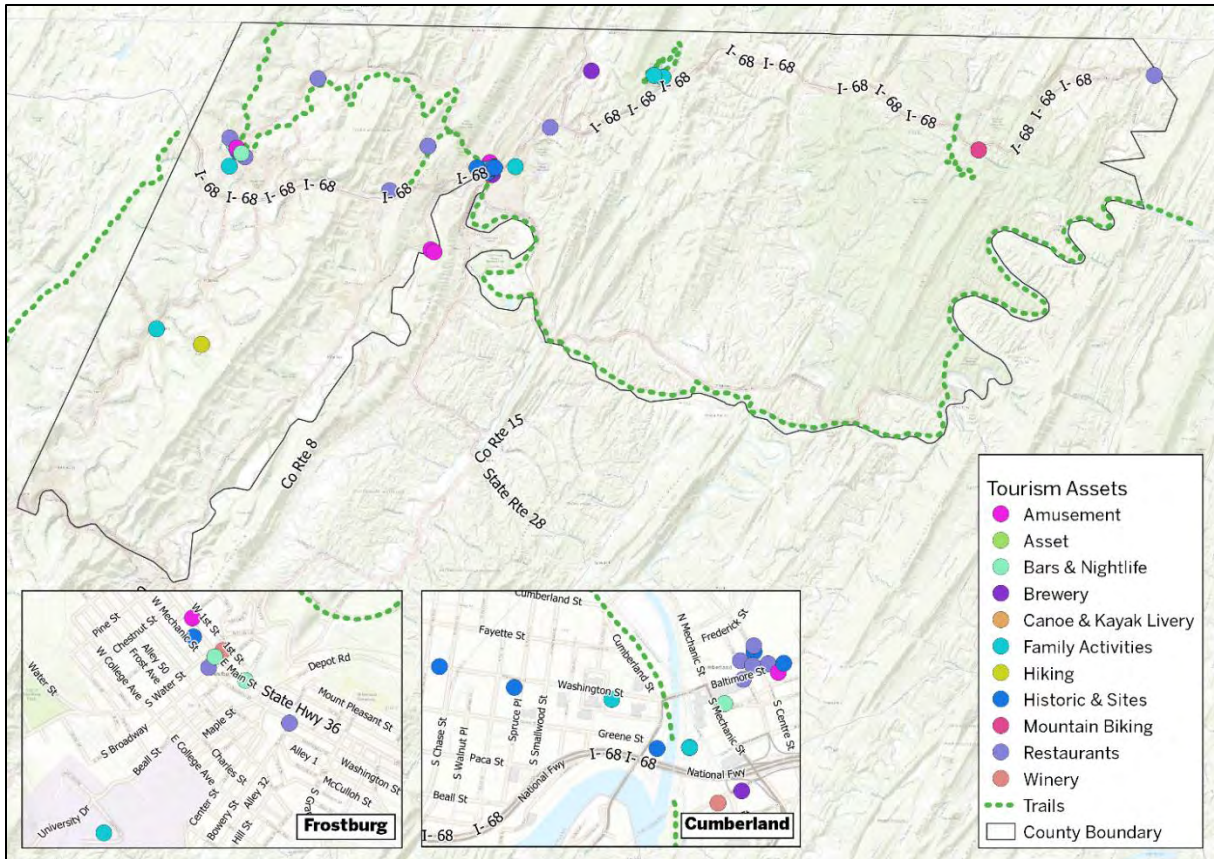


Table 8: Using categories below, tell a tourist where they should visit for the best experience.

<p>Restaurants</p> <ul style="list-style-type: none"> Ristorante Ottaviani (8 responses) Manhattan Social (3 responses) Baltimore Street Grill (2 responses) Giuseppe's Italian Restaurant (2 responses) Puccini Restaurant (2 responses) Clatter Café (1 responses) Coney Island Famous Wieners (1 responses) Corner Tavern & Cafe (1 responses) D'Atri's Restaurant (1 responses) Dunnigans (1 responses) Fratelli's Restaurant & Bar (1 responses) Oak Barrel Cafe (1 responses) Sand Springs Saloon & Steakhouse (1 response) The Culinaire Café of Allegany College of Maryland (1 responses) Corner Tavern & Café (1 response) <p>Amusement</p> <ul style="list-style-type: none"> DelFest (2 response) Cultural Events Series at Frostburg State University (1 response) Dancing, International Folk Dancing (1 response) Frostburg (1 response) Mr. Toads Pottery (1 response) Rocky Gap State Park (1 response) The Greater Cumberland Raceway (1 response) Western Maryland Historic Railroad (1 response) Wisp Resort (1 response) <p>Hiking</p> <ul style="list-style-type: none"> Great Allegheny Passage (7 responses) Rocky Gap State Park (7 responses) Green Ridge State Forest (3 responses) Big Savage Mountain Hiking Trail (2 responses) Canal Place Heritage Area/Savage River (2 responses) Chesapeake and Ohio (C&O) Canal (2 responses) Dans Mountain State Park (2 responses) Swallow Falls State Park (1 response) <p>Winery</p> <ul style="list-style-type: none"> The Toasted Goat (10 responses) Charis Winery Inc. (5 responses) 	<p>Bars & Nightlife</p> <ul style="list-style-type: none"> Dante's (3 Responses) Rocky Gap Casino (3 Responses) Downtown Frostburg (2 responses) Niners (2 Responses) LG's (1 response) <p>Mountain Biking</p> <ul style="list-style-type: none"> GAP Trail (6 responses) Rocky Gap (2 responses) 15 Mile Creek (1 Response) Green Ridge State Park (1 Response) <p>Historic & Sites</p> <ul style="list-style-type: none"> Downtown Cumberland, MD (2 responses) George Washington's Headquarters (2 responses) Washington Street in Cumberland, MD (2 responses) Braddock Trail (1 response) Chesapeake and Ohio (C&O) Canal (1 response) Frostburg Museum (1 response) Heritage Days Festival (1 response) Historic Frostburg, MD (1 response) The Allegany County Historical Society / The Gordon-Roberts House (1 response) Western Maryland Historic Railroad (1 responses) <p>Canoe & Kayak Livery</p> <ul style="list-style-type: none"> Rocky Gap State Park (6 responses) Potomac (2 responses) Jennings Randolph Lake (1 response) <p>Family Activities</p> <ul style="list-style-type: none"> Rocky Gap State Park/Beach (4 responses) Library (2 responses) Canal Place Events (1 response) Coney Christmas (1 response) Coney Days (1 response) Constitution Park (1 response) Storybook Holiday (1 response) Wisp Resort (1 response) Rocky Gap Casino (1 response) Western Maryland Scenic Railroad (1 response) <p>Brewery</p> <ul style="list-style-type: none"> 1812 Brewery (12 responses)
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Figure 7: Tourism Asset Map



OTHER COMMENTS

Additional written comments echoed findings throughout the public visioning session activities. Major themes included a changing workforce, infrastructure, quality of life, recreation and lifestyle amenities, blight, and tax incentives to improve housing and business retention and attraction. Some comments called for greater cooperation between Allegany County and other governments in the region to leverage existing assets and partner on regional activities. Several residents felt that the cities, agencies, and the County are duplicating efforts.

Some comments expressed concerns around Allegany County's image and marketing. Specifically, individuals felt that external perceptions due to blight challenge the County's ability to highlight and market its unique assets. In addition to community image, the County should focus on expanding recreational amenities in the County. Suggestions included potential indoor and outdoor activities such as mini golf, swimming pools, rope courses, and spa facilities such as steam rooms and saunas.

Aging infrastructure was a concern for the City of Cumberland, one comment suggested that this issue strains tax dollars. Major service and infrastructure needs identified during the public visioning sessions included public transportation, high-speed internet, and broadband. Additionally, pedestrian and bike safety in Cumberland and Frostburg was mentioned. In particular, lacking infrastructure for cyclists makes it difficult for short trips. Additional bus, rail, and airport service was identified by a large share of residents as these connection points to other cities are crucial in attracting and sustaining new residents.

Social programs came up in some discussions including safe and affordable childcare, aging in place, support for victims of domestic violence, anti-drug programs, after school programs, and scholarships. Residents stressed the need for inclusivity in the plan and highlighted the need for social support programs.

General comments around housing identified vacancy and a need for restoration. With regards to a proposed housing study mentioned during the panel, one suggestion noted that amenities should be included as well as a focus on housing needs outside of Frostburg, La Vale, and Cumberland to understand the entire County.

Some residents expressed concern that a disproportionate effort is made to attract new businesses to Allegany County while retention and expansion of existing businesses is lacking. One comment in particular connected business retention and expansion (BRE) and more focus on existing assets as crucial components of furthering Allegany County's economic development goals.

Multiple suggestions were made on how to combat a declining population by attracting and retaining new and previous residents of Allegany County. Three target groups identified were: young professionals willing to relocate to Allegany County, Allegany County residents that have moved elsewhere, and high-end retirees. Other groups included climate refugees with a focus on Allegany's natural assets and green energy jobs. One respondent suggested a "come home campaign" intended to attract previous Allegany residents back to the County who may now be eligible to telecommute to nearby markets. One resident commented that additional diverse representation of individuals in promotional and marketing materials targeting new residents is needed for this effort.



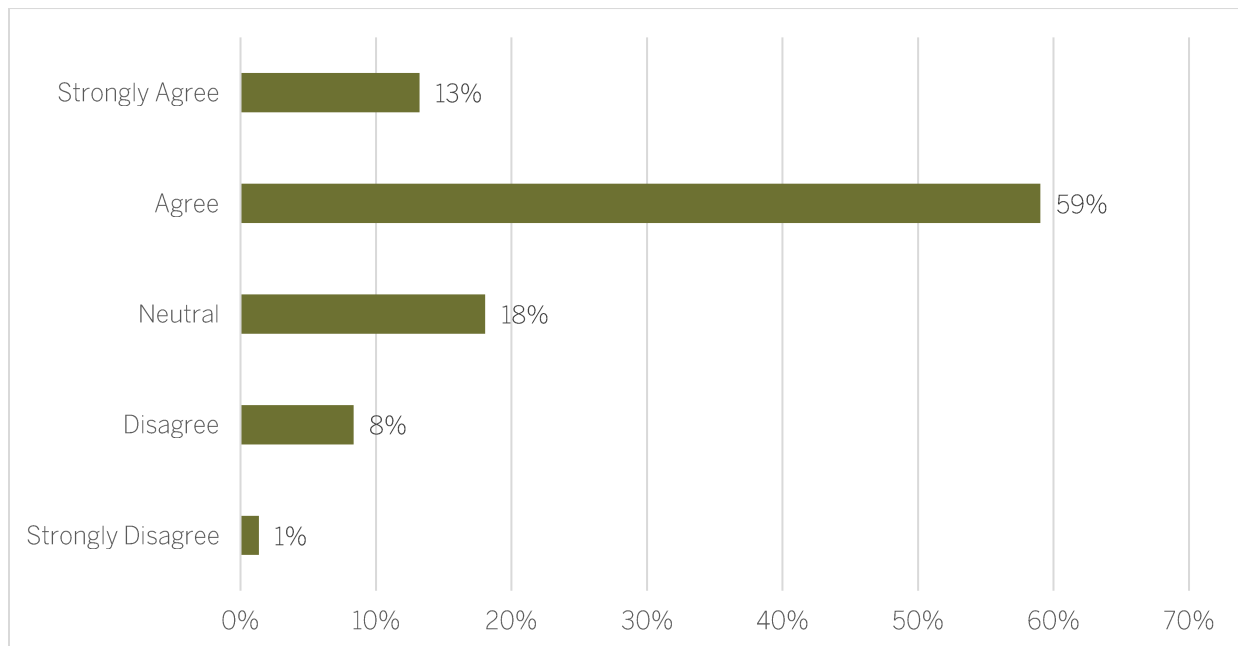
ONLINE SURVEY

An online survey was dispersed to Allegany County residents asking for public feedback regarding community and business amenities, housing, tourism, and other topics. The survey was open from November 26, 2018 until February 1, 2019, and was distributed via community social media pages and the local newspaper. In total, 373 responses were submitted to the survey with 84% of respondents completing all questions. The survey included 29 questions that asked residents to rate statements regarding quality of life in Allegany County and their overall satisfaction with issues similar to those discussed in focus groups and public visioning sessions.

PERCEPTIONS OF ALLEGANY COUNTY

Allegany County residents largely agreed that the County is a safe place to live and work. Out of 371 respondents for this question, 59% agreed and 13% strongly agreed that it is a safe place to live and work. While, 18% of respondents were neutral about the County's safety, only 8% disagreed.

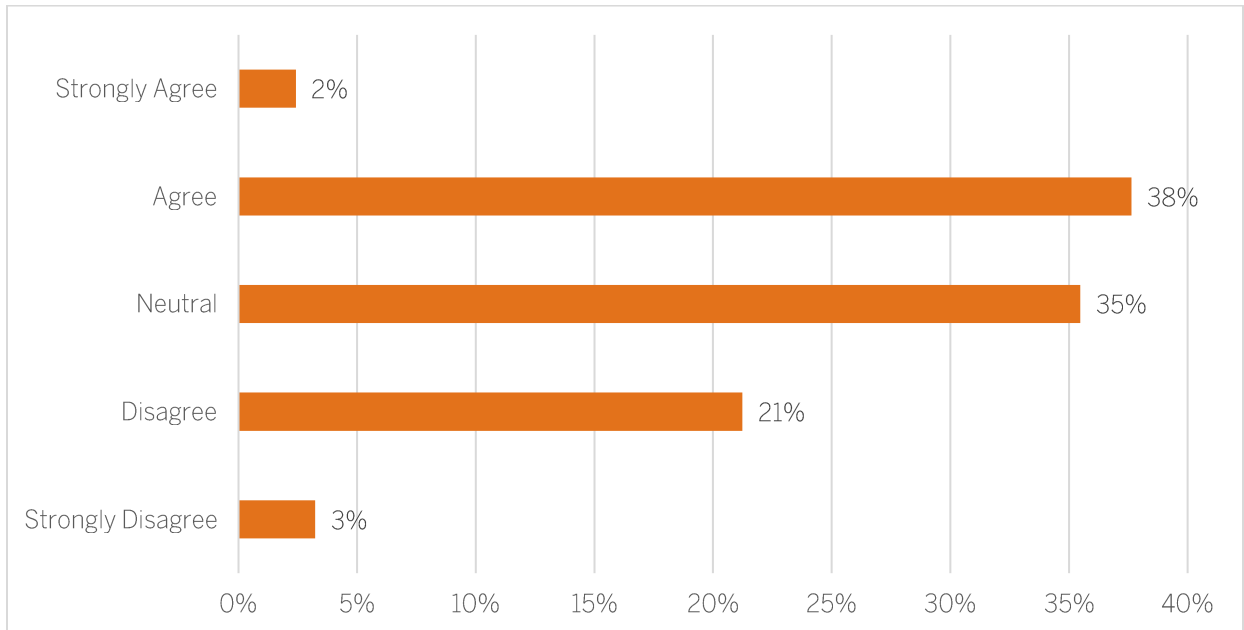
Figure 8: Safe Place to Live and Work



Allegany County residents were asked if the County is responsive to their needs. A significant number of residents, 40%, either agreed or strongly agreed that the County is responsive to their needs. However, a large number of residents, 35%, were neutral, 21% disagreed, and 3% strongly disagreed, indicating a need for improvement in some areas.

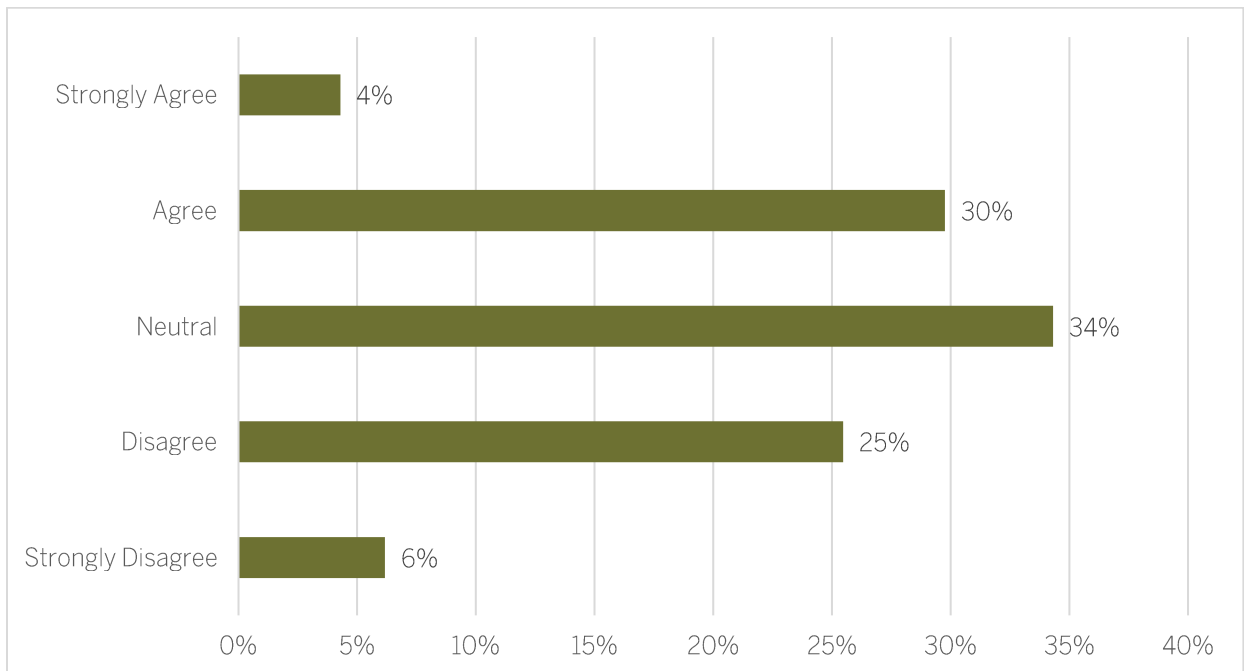


Figure 9: Responsive to Needs of Residents



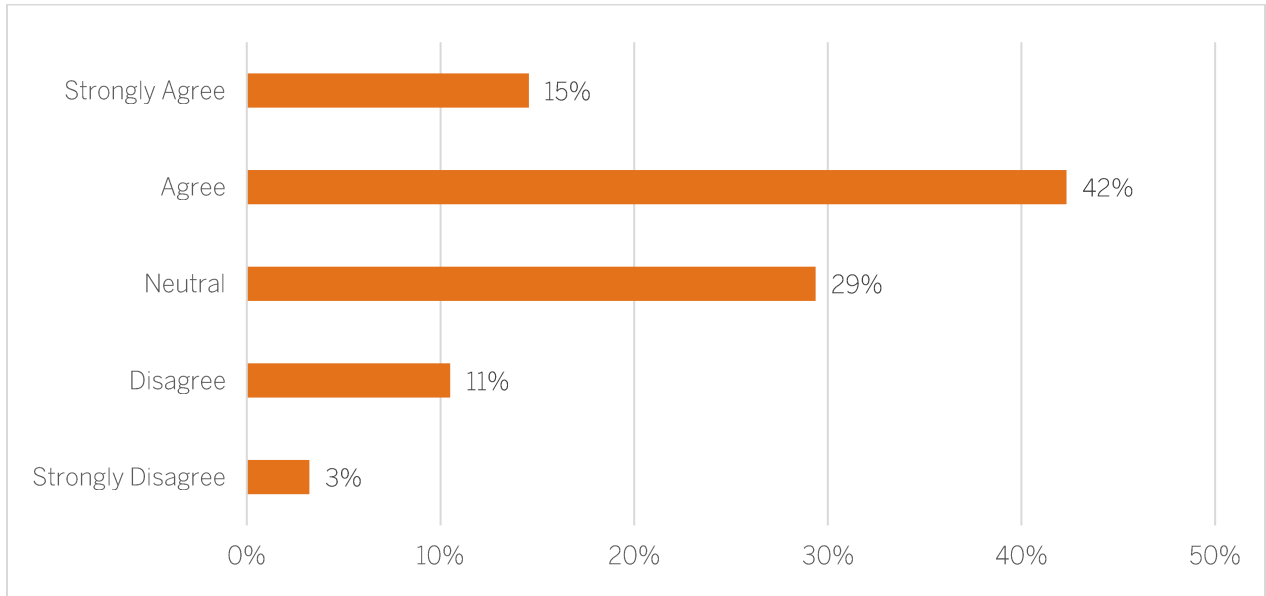
Additionally, residents were asked how responsive they feel that the County is to business needs. Responses to this question showed less consensus and offered a varied outlook in response. Over a third of respondents (34%) either agreed or strongly agreed that the County was responsive to business needs. However, 31% either disagreed or strongly disagreed with the statement.

Figure 10: Responsive to Needs of Business



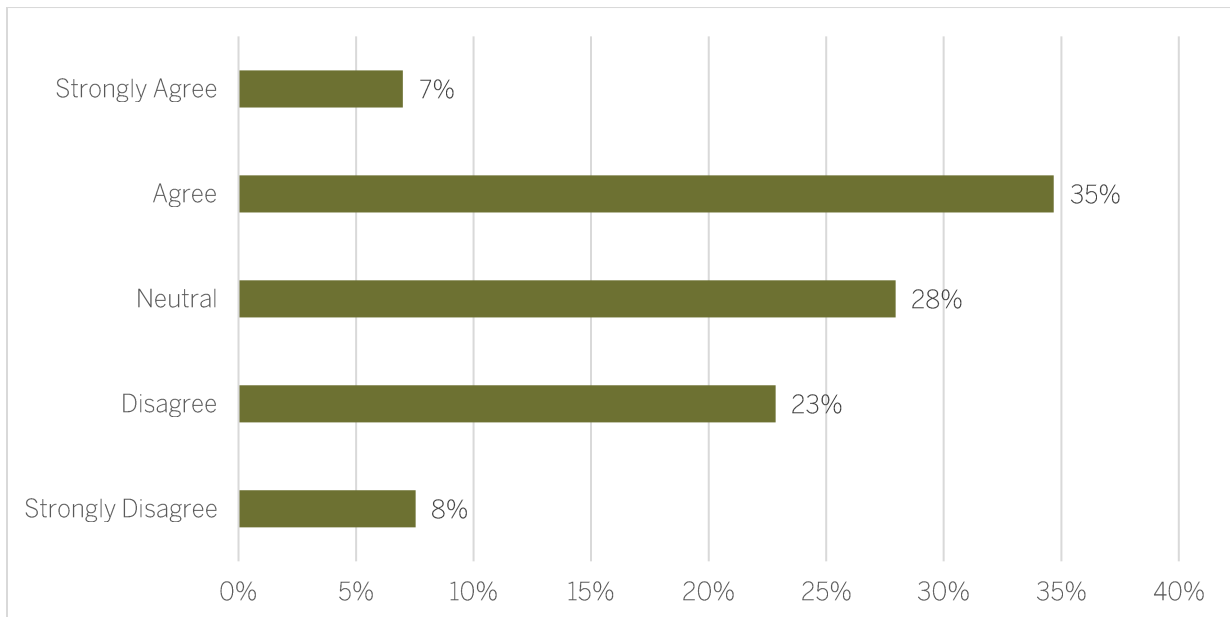
Residents were asked if they have access to County officials and staff when they have a concern. Several respondents (15%) strongly agreed, and 42% agreed that their concerns are heard by County officials and staff. However, 11% of respondents disagreed, implying that they do not have access to County officials and staff about their concerns.

Figure 11: Access to County Officials and Staff when there is a Concern



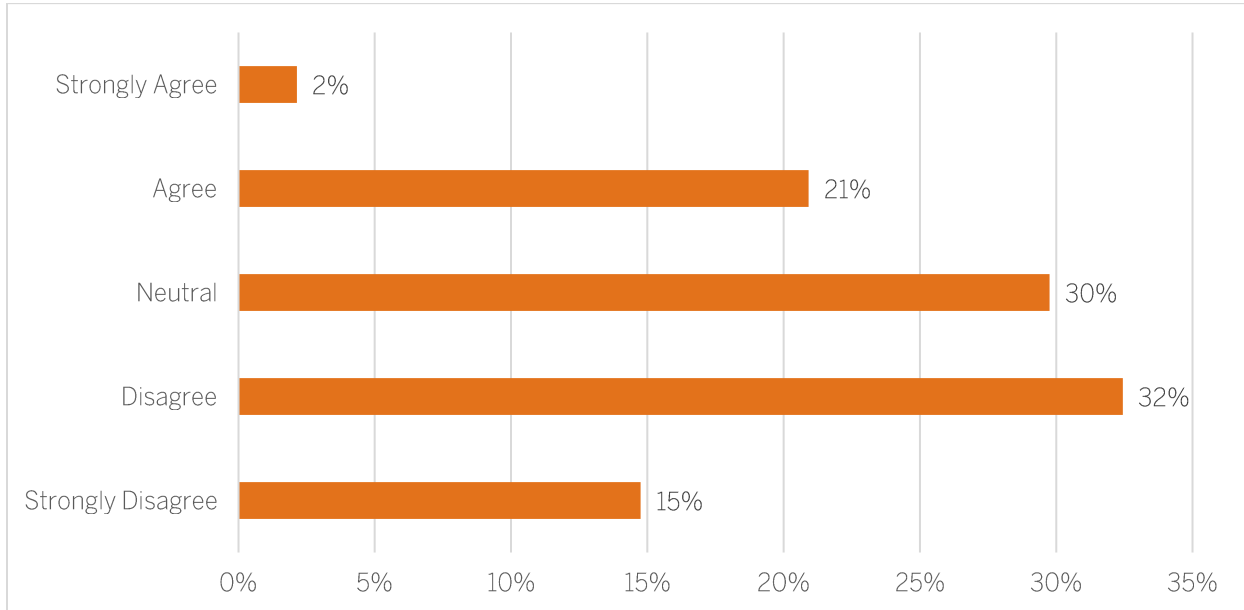
Respondents had mixed opinions when it comes to the accessibility of employment opportunities. A total of 7% strongly agreed and 35% agreed that employment opportunities are accessible within the County. However, 23% of respondents did not agree and 85 strongly disagreed with the statement.

Figure 12: Employment Opportunities are Accessible



Residents were also asked if the employment opportunities pay wages that support their lifestyle. The majority of respondents did not agree that wages from employment opportunities are supporting their lifestyle. In total, 32% disagreed and 15% strongly disagreed with the statement. A total of 23% of respondents either strongly agreed or agreed that the employment opportunities pay sufficient wages for their lifestyle.

Figure 13: Employment Opportunities Pay Wages that Support Lifestyle

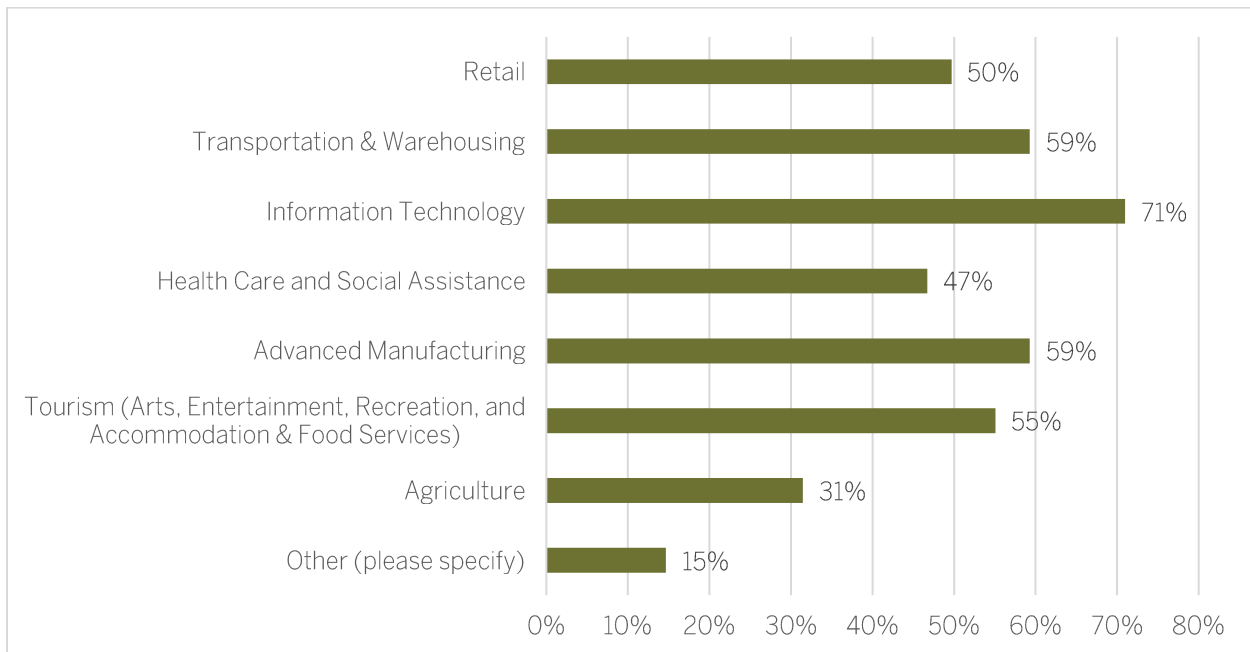


APPROPRIATE INDUSTRIES/AMENITIES

Respondents were asked to choose one or more types of businesses that would be a good fit for Allegany County. The choices were: Retail, Transportation & Warehousing, Information Technology, Health Care and Social Assistance, Advanced Manufacturing, Tourism, Agriculture, and an open-ended selection of Other. The top selection was Information Technology with total of 71% of 354 respondents selecting this option. Other top options included Transportation and Warehousing (59%), Advanced Manufacturing (59%), and Tourism (55%). Retail and Health Care & Social Assistance were selected by 50% or less of the respondents. The least selected option was Agriculture with only 31% of respondents indicating more Agriculture businesses would make sense in the County.



Figure 14: Types of New Businesses



The Other selection generated a variety of suggestions and intriguing findings. A few respondents specified attracting industries that aligned with the talent of Frostburg State University students and graduates to entice these students to stay in the County after graduation. Another respondent welcomed a corporate headquarters for Finance or Insurance. Several respondents were adamant about adding small businesses—in a number of specialties—to the County’s landscape. Many respondents provided additional commentary on amplifying Tourism. Respondents specified Tourism needs: outdoor activities such as biking, hiking, and water sports, promotion for wellness, and bluegrass and country music concerts or festivals.

Respondents were asked what specific locations in Allegany County are suitable for development or redevelopment opportunities. Over three hundred respondents provided location suggestions. The most popular location mentioned was Frostburg. The second most suggested location was Cumberland. Respondents mentioned utilizing where Memorial Hospital used to be and the Mexico Farms area. Additional suggestions included the available land near I-68, especially near Exit 33 Midlothian Road and Route 220 Southbound. Other towns that were mentioned were Cresaptown, LaVale, and Flintstone.



Some respondents voiced more information in their Other comments. Suggestions for family activities included arcades, SkyZone, mini golf, and a bowling alley. Respondents would also like popular restaurants to come to the area. A few respondents suggested selling tourist packages to attract people to the area and having more Bed & Breakfast style hotels. Another respondent suggested that marketing of the existing tourism products is lacking or could be strengthened.

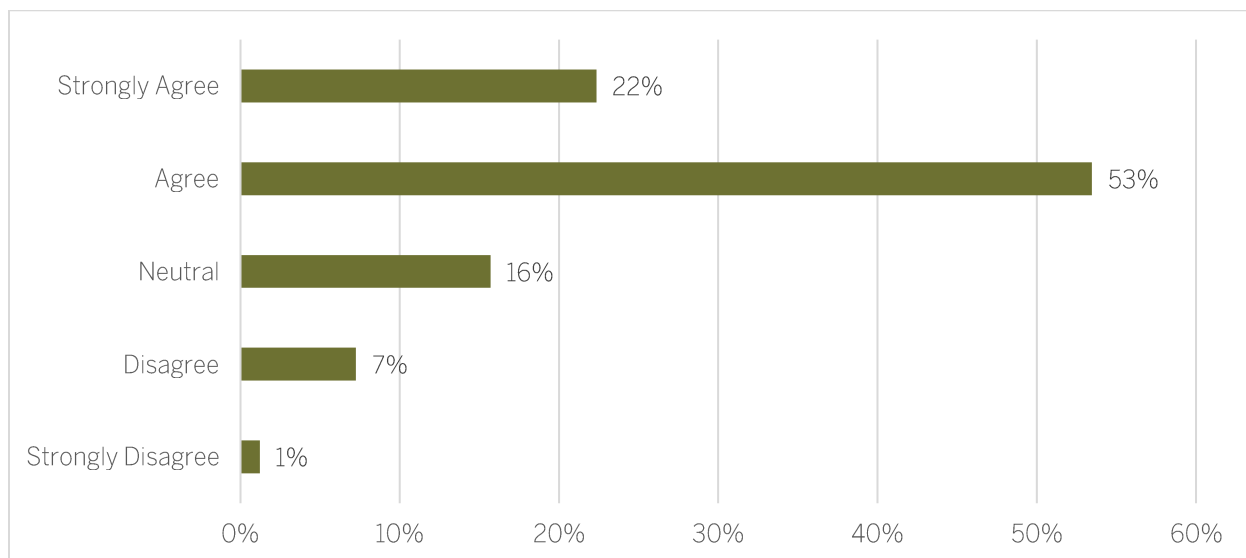
The following question asked respondents how the County could enhance Allegany's tourism. Multiple respondents said that investments in infrastructure and blight need to be made in downtown Cumberland and the area near the Interstate. An additional comment suggested raising awareness about the history and legacy of Allegany County. Other suggestions included updating and revamping the County tourism website and developing a tourism industry brochure. Many respondents stressed using the natural assets of the County such as the river and canal for water recreation and utilizing biking/hiking trails. A respondent suggested partnering with Amtrak to bring Washington D.C. residents to the area for weekend trips.

Residents were also asked to provide more detail about Restaurants and Retail that they would like incorporated in Allegany County. The majority of respondents were suggested adding more chain restaurants such as Olive Garden, Chili's, Golden Corral, and Outback. Some respondents would also like family, sit-down style restaurants, which connects with respondents specifying the need for family activities in a previous question. Some respondents also welcomed higher-end and farm-to-table restaurants. In addition to brand-name restaurants, respondents particularly wanted brand-name retail stores such as Target, Old Navy, and Boscov's. A few respondents would also like home furniture stores.

HOUSING

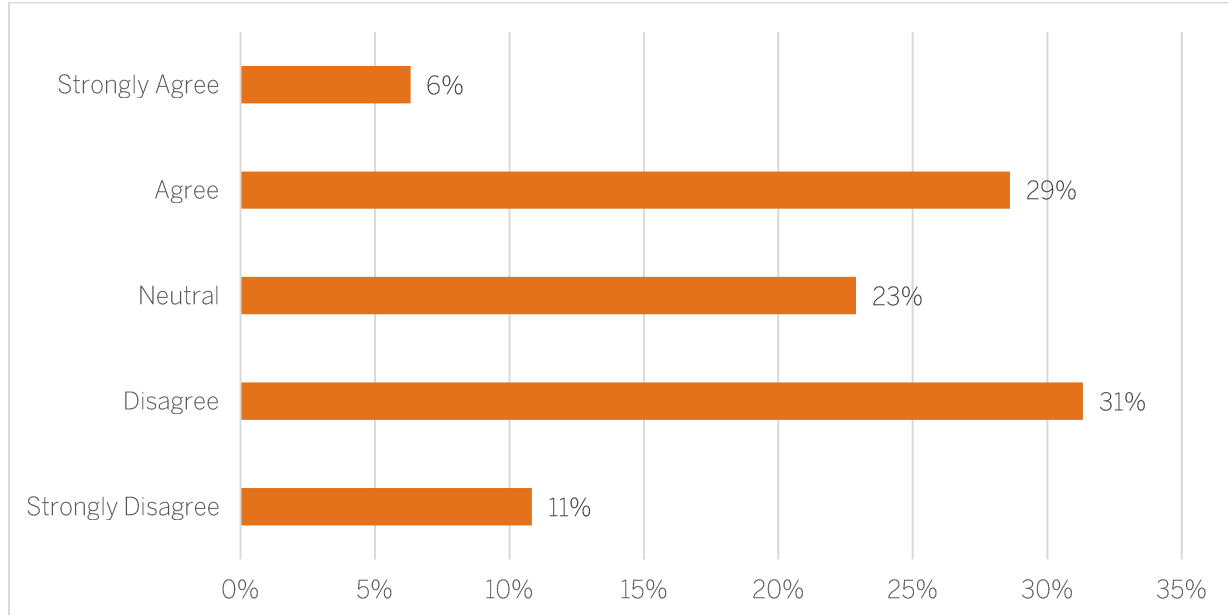
Residents were also surveyed about housing options. Firstly, respondents were asked if housing is affordable in Allegany County. An overwhelming number of respondents agreed. In particular, 22% strongly agreed, and 53% agreed that housing is affordable. Only 7% of respondents did not think the housing is affordable.

Figure 17: Housing is Affordable



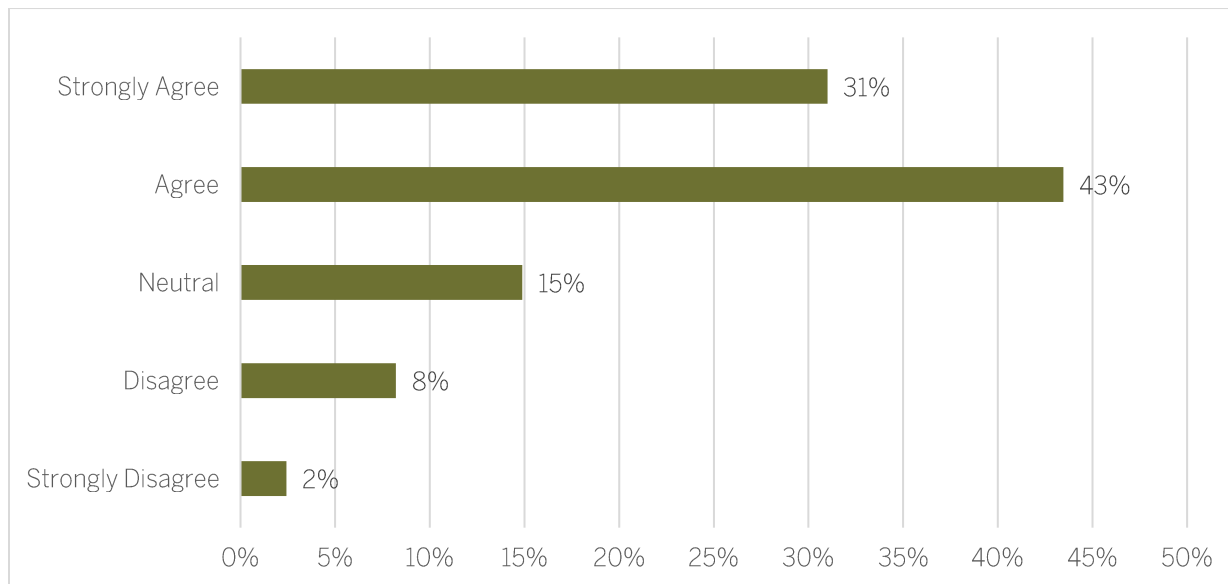
Respondents were also asked if there is an adequate supply of quality housing. Response rates varied when it came to this question. A total of 35% of respondents either agreed or strongly agreed with the statement. However, larger portion of respondents, 42%, either disagreed or strongly disagreed that there is an adequate supply of quality housing.

Figure 18: Adequate Supply of Quality Housing



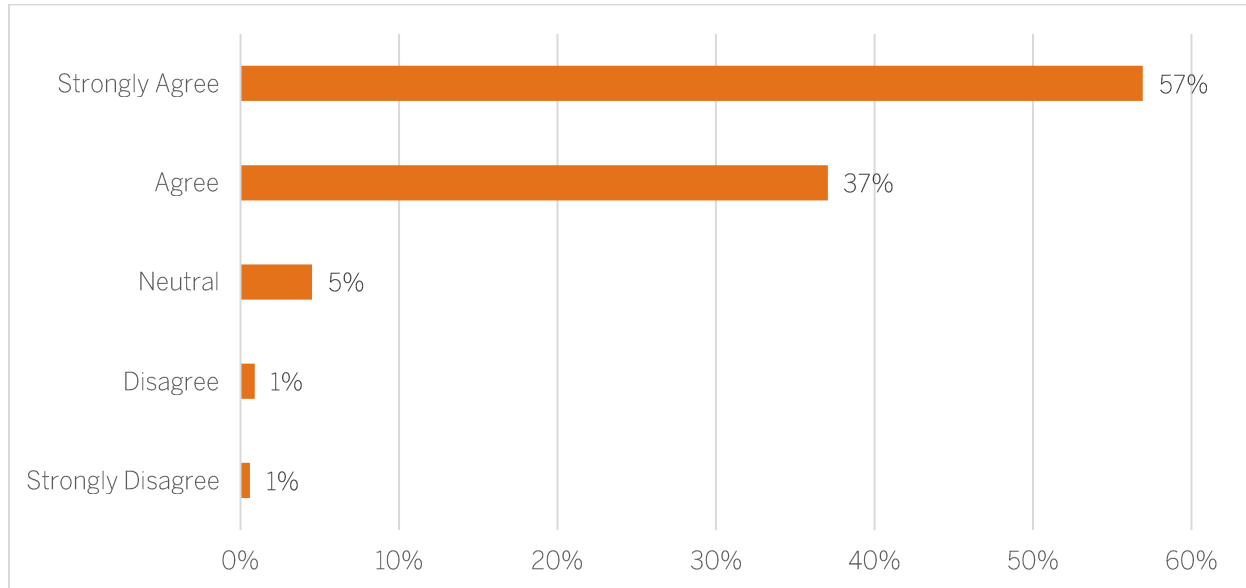
Respondents were asked if maintaining the character of Allegany County's historic neighborhoods is important. The majority of respondents affirmed this statement. Of the respondents, 31% strongly agreed and 43% agreed. Only 10% of respondents disagreed or strongly disagreed that maintaining the character of the historic neighborhoods is important.

Figure 19: Maintaining the Character of Historic Neighborhoods is Important



In addition to being asked about historic neighborhoods, respondents were also asked if blighted buildings and properties are an issue in Allegany County. An overwhelming 57% strongly agreed that blighted properties are an issue, and an additional 37% agreed. Only 10% disagreed or strongly disagreed that blighted buildings and properties are an issue in the County.

Figure 20: Blighted Buildings and Properties are an Issue



In order to get a better baseline of housing needs, respondents were asked to provide types of housing that they would like to see in Allegany County. Most respondents were concerned about having single-family housing and senior living facilities. Some respondents stressed the need for affordable housing, including affordable apartments and houses ranging from \$100,000-\$200,000. Respondents wanted younger residents to have access to affordable apartments so they can live and work in Allegany County. Only a few respondents mentioned renovating older housing; most respondents preferred modern housing.

Respondents were also asked what locations would be suitable for housing development or redevelopment. The main locations that respondents wanted to see housing development were in Cumberland and Frostburg. Respondents indicated that housing near Frostburg State University and Allegany College of Maryland would be desirable. Other suggested areas included land near lower LaVale, the location of the old Allegany High School, and the former Memorial Hospital. Respondents mentioned how housing should be near transportation, especially for those on the lower end of the socio-economic income spectrum.

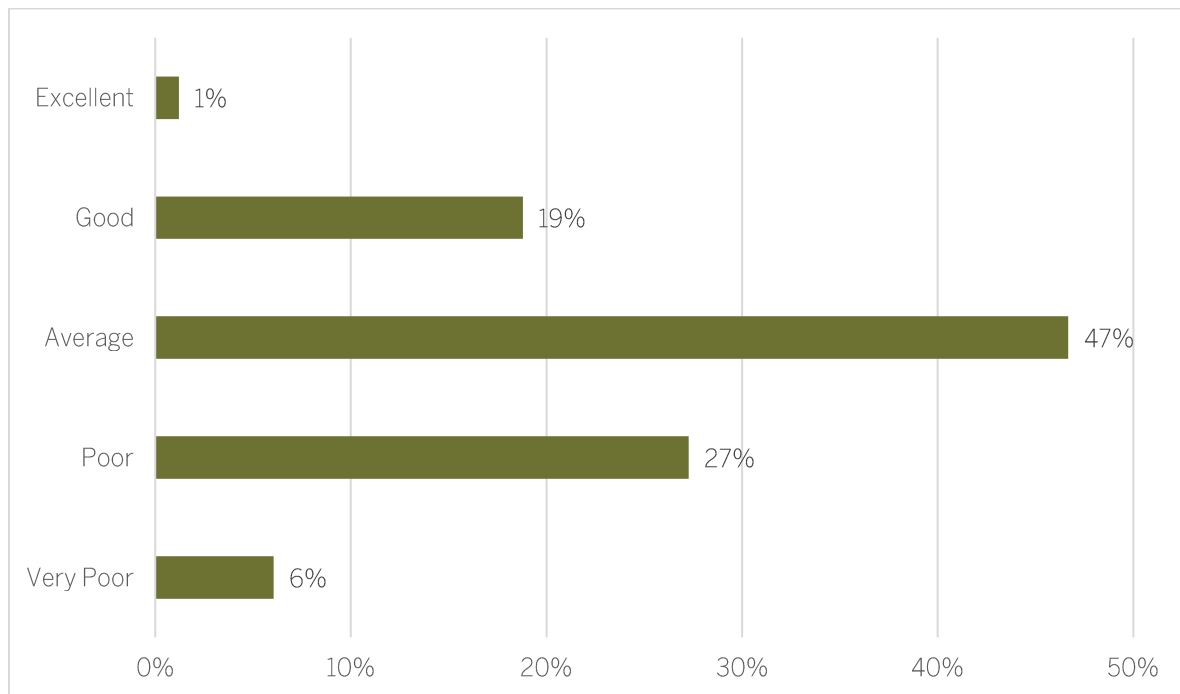


INFRASTRUCTURE

Respondents were asked to describe infrastructure improvements that are needed. Respondents predominantly noted roads and bridge work. Many respondents mentioned the need to address vacant buildings. Residents also indicated they would like to see additional transportation options, particularly bus service, and better internet connection and utilities. They also would like more street and traffic lights.

Respondents also rated the overall quality of infrastructure. Most respondents, 47%, rated the quality is average. Additionally, 27% of respondents rated the quality as poor, and 19% rated it as good.

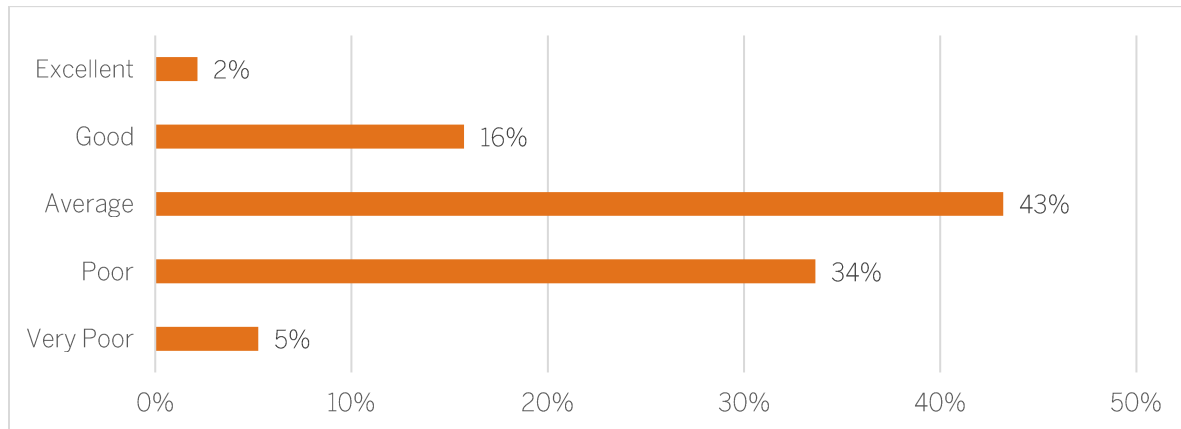
Figure 21: Quality of Infrastructure



ENTREPRENEURISM

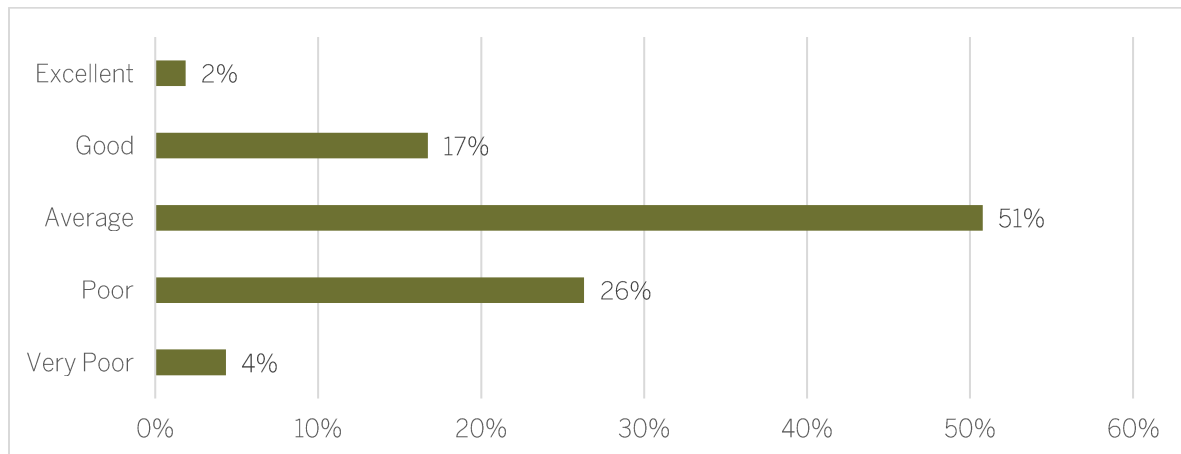
On the topic of entrepreneurship, residents were asked how they rate the opportunity to start a successful business in Allegany County. The highest percentage of respondents, 43%, thought opportunities were average, but a large percentage of respondents, 34%, rated opportunities for entrepreneurship as poor. Only 16% of respondents rated the opportunity to start a successful business in Allegany County as good.

Figure 22: Rate the Opportunity to Start a Successful Business



Similarly, residents were asked how they would rate supportive services for entrepreneurs, small businesses, and/or startups in Allegany County. Again, respondents predominantly rated supportive services as average. In total, 51% of respondents chose average, 17% of respondents thought that the supportive services are good, and 26% of respondents thought they were poor.

Figure 23: Rate of Supportive Services for Entrepreneurs, Small Business, and/or Startups



In order to gather additional insights on this topic, residents were asked to describe specific services for entrepreneurs could be improved. The majority of respondents cited the need for tax breaks or tax incentives. Respondents would like to see planning assistance, grant-type opportunities and small business loans, and easier access to permits. The respondents felt that assistance for starting a business is lacking. In addition to substantial red tape making starting a business more difficult, multiple respondents commented on the failure of small business due to a small customer base.



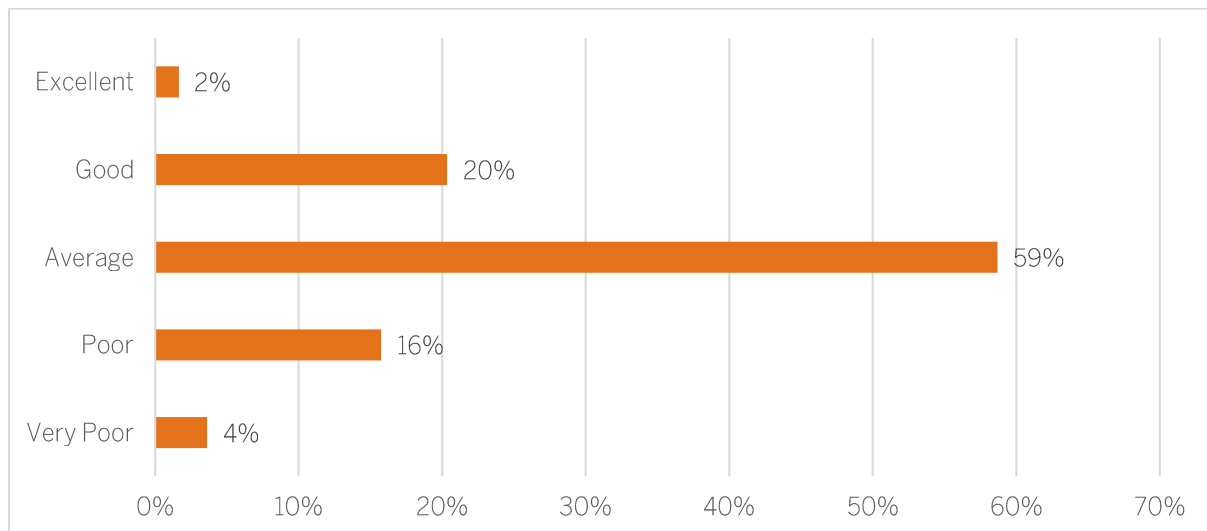
Respondents were asked what opportunities, such as favorable taxes, skilled workers, or business assistance programs already exist for starting a business in Allegany County. Respondents mentioned the affordable cost of living. The respondents do not believe that the County has a properly skilled workforce. However, the residents mentioned the connections to education and workforce through Frostburg State University and Allegany County College of Maryland. Many respondents said there are tax incentives for business already present in the County. It should be noted that many commented that they were unsure or did not know of current opportunities in the County.

Respondents were also asked what impediments exist to starting a business in Allegany County. Respondents identified similar challenges mentioned before, including the lack of a skilled workforce. Respondents were concerned that there is not enough consumer demand for business due to a large number of low-income residents in the community. Respondents also mentioned a lack of financial assistance and social media channels to advertise businesses.

EXISTING BUSINESSES

Lastly, respondents were asked to rate supportive services for existing businesses in Allegany County. The majority of respondents, 59%, thought the supportive services for existing businesses are average. An additional 20% of respondents thought that the supportive services are good. However, 16% of respondents selected that the supportive services are poor.

Figure 24: Rate of Supportive Services for Existing Business



Respondents were asked to describe specific services for businesses that could be improved. Respondents mentioned tax breaks, relationships with local government officials, and transportation. Respondents were also asked to describe any opportunities that currently exist for businesses. Respondents mentioned the cost of living, the availability of state tax credits, and favorable taxes. One respondent mentioned that the Small Business Administration as a good resource. Many respondents again identified the lack of skilled workforce as a challenge.



