

*Economic Development from a
Regional Perspective*

CEDS 2022-2023

**COMPREHENSIVE ECONOMIC DEVELOPMENT
STRATEGY FOR THE LOWER EASTERN SHORE
OF MARYLAND**



Tri-County Council for the
Lower Eastern Shore of Maryland

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Lower Eastern Shore of Maryland



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Salisbury-Wicomico Economic Development, Wicomico County Parks & Tourism

Somerset County Economic Development, Somerset County Recreation, Parks & Tourism, Somerset County Sanitary District

Worcester County Tourism and Economic Development

City of Salisbury

Wor-Wic Community College, University of Maryland Eastern Shore, Salisbury University

Somerset County Technical High School, Worcester Technical High School, Parkside Career and Technical High School

Wallops Flight Facility (NASA), Salisbury-Wicomico Regional Airport

Pocomoke Chamber of Commerce, Snow Hill Chamber of Commerce, Berlin Chamber of Commerce, Greater Ocean City Chamber of Commerce

Crisfield Chamber of Commerce, Princess Anne Chamber of Commerce, Greater Salisbury Chamber of Commerce, Greater Salisbury Committee

Ronald E. Powell Convention Center

Atlantic General Health System, Tidal Health System

Forest Service—Maryland Department of Natural Resources

Maryland Department of Commerce



LETTER FROM EXECUTIVE DIRECTOR

The Tri-County Council for the Lower Eastern Shore of Maryland is pleased to introduce the 2022-2023 Comprehensive Economic Development Strategy for the Lower Eastern Shore (CEDS). In 2003, shortly after its creation by the Maryland legislature, the Council submitted the first CEDS for the Lower Eastern Shore. Since then the CEDS has undergone consistent five year restructurings as well as annual updates such as this one. In 2009 the Council was designated an Economic Development District (EDD) by the Economic Development Administration (EDA) of the U.S. Department of Commerce.

In addition to being a hallmark of the CEDS process, the terms “region” and “regionality” increasingly are a component of contemporary economic development throughout Maryland and the United States. Consequently, the original 2003

Lower Eastern Shore CEDS identified one of its goals as the creation of “*comparative*

advantages for the region, otherwise impossible for a single county to accomplish on its own.”

This concept of comparative advantages has continued to develop since that first CEDS, and in fact has deep roots in the Lower Eastern Shore’s history. More than 350 years earlier, in 1666, the Province of Maryland established the county of Somerset, which encompassed the area now known as Somerset, Wicomico and Worcester counties. Two later sub-divisions of Somerset created the counties of Worcester (1742) and Wicomico (1867), thus solidifying the Lower Eastern Shore’s current tri-county configuration while retaining its identity as a *region*.

Today, the concept of a multi-county region with identifiable comparative advantages over a single county is worthy of renewed emphasis. This manifests not only in the increasing competition for federal funds, but as part of a comprehensive notion of economic development paired with branding and cultural identity.

Cognizant of history, yet mindful of contemporary economic forces, it is therefore easy to imagine the comparative advantages of a *single county* with the following attributes:

- A centrally located commercial/manufacturing hub with a river port;
- Two universities in the State system, three technical high schools, and a first-rate community college;
- Two innovative and rapidly developing healthcare systems;
- More than one thousand miles of Chesapeake Bay shoreline;
- A world class ocean resort town on thirty miles of Atlantic coast;
- Historic riverside hamlets and towns with a rich cultural and architectural tradition;
- Large swaths of open space comprised of farms and forest;
- An eager and innovative workforce;
- Transportation linkages throughout.



This year’s annual update continues the format changes initiated in the previous year. First among these changes is the transition toward an emphasis on specific named infrastructure projects in the strategies and action plans section after each of the four stated goals. In keeping with EDA instructions and guidelines, a separate section on “Economic Resiliency” provides contemporary insight to the notions of economic diversification and preparedness. Users of the CEDS who wish to reference additional detail and supporting data can do so by referencing the DelMarVa Index Economic Dashboard, a project resulting from a partnership between the Tri-County Council, the Mid-Shore Regional Council and the Eastern Shore Regional GIS Cooperative of Salisbury University. Supplemental information is also available at LESMD.net, the Lower Shore’s regional economic development website.

Finally, I would ask everyone who utilizes the 2021-2022 CEDS to remember its identified priorities are entirely local in nature, arrived at by local residents who live or work on the Lower Eastern Shore. This goes hand in hand with the ultimate goal of the CEDS — that all residents of the Lower Eastern Shore will enjoy a high quality of life with fulfilling educational and employment opportunities supported by access to housing in a sustainable environment.

Sincerely,

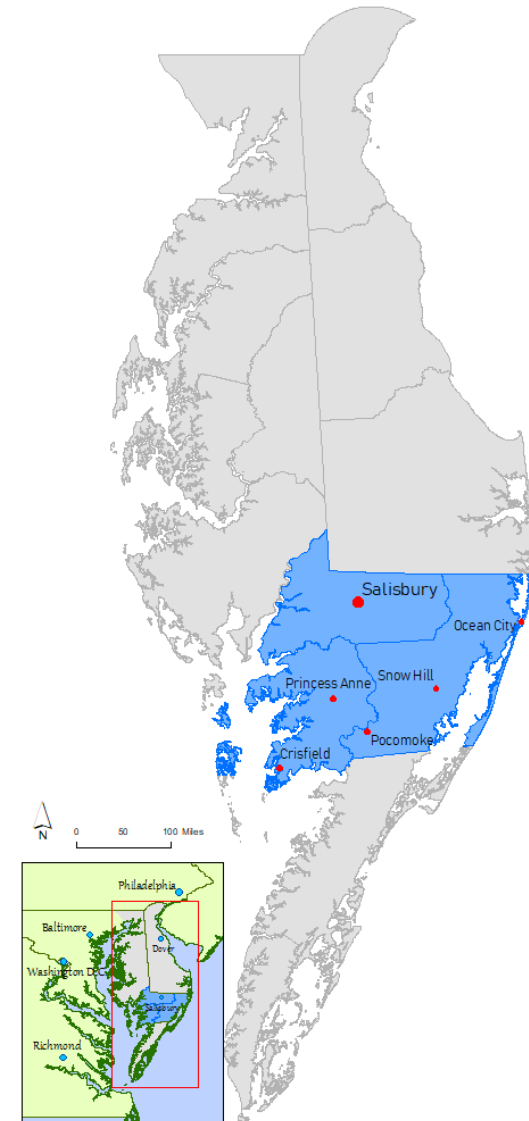
Gregory E. Padgham

Tri-County Council for the Lower Eastern Shore of Maryland



New regional branding logo, 2019

OUR REGION





CEDS COMMITTEE TIMELINE AND VENUES

The following timeline highlights the process used to develop this 2021-2022 CEDS Report.

- 1) **September 2021—October 2021:** Tri-County Council Economic Development Division will meet separately with the Economic Development Directors of each county to identify county-specific projects for inclusion in the CEDS and to revise and review progress indicators (progress, progression, and status timeline);
- 2) **October 2021:** Tri-County Council will facilitate the first of two CEDS meetings to review the CEDS Goals/County-specific projects/Progress indicators;
- 3) **November 2021—January 2022:** Tri-County Council will interpret and update statistical hard data and revise Goals/County-specific Projects/Progress indicators based on input from CEDS Committee and County Directors of Economic Development;
- 4) **January 2022:** Tri-County Council will facilitate the second of two CEDS Committee meetings for evaluation, review and final vot on revisions proposed at first CEDS Committee meeting;
- 5) **January 2022—June 2022:** Tri-County Council will execute final revisions and graphic layout based on input from the second of two CEDS Committee meetings;
- 6) **March 18, 2022:** Executive Director presented the final revised CEDS projects to the Tri-County Council Full board at quarterly meeting and request ratification.
- 7) **April 30, 2022 Deadline:** Tri-County Council will submit final revised CEDS to EDA via Grants Online Government Portal, update LESMD.net, and update the Tri-County Council Administrative website with new document.



2022-2023 CEDS COMMITTEE MEMBERSHIP

TRI-COUNTY COUNCIL VOTING MEMBERS

Charles Laird—Somerset County Commissioner

Randy Laird—Somerset County Commissioner

Craig Mathies—Somerset County Commissioner

Rex Simpkins—Somerset County Commissioner

Eldon Willing—Somerset County Commissioner

Nicole Aclé—Wicomico County Council

John Cannon—Wicomico County Council

Josh Hastings—Wicomico County Council

Bill McCain—Wicomico County Council

John Psota—Wicomico County Acting Executive

Bud Church—Worcester County Commissioner

Ted Elder—Worcester County Commissioner

Joe Mitrecic—Worcester County Commissioner

Josh Nordstrom—Worcester County Commissioner

Diana Purnell—Worcester County Commissioner

Eric Banks—Crisfield City Council

Muir Boda—City of Salisbury

Esther Troast—Pocomoke City Council

Senator Mary Beth Carozza—Maryland State Senate

Delegate Carl Anderton—Maryland House of Delegates

Delegate Wayne Hartman—Maryland House of Delegates

Delegate Charles Otto—Maryland House of Delegates

Delegate Sheree Sample-Hughes—Speaker Pro Tem MD House of Delegates

COUNTY ECONOMIC DEVELOPMENT

Dave Ryan—Wicomico County Economic Development

Melanie Pursel—Worcester County Economic Development

Danny Thompson—Somerset County Economic Development

Michele Burke—Worcester County Business Development

Ivy Wells—Berlin Economic and Community Development

COUNTY TOURISM

Clint Sterling—Director, Somerset County Tourism

Kristen Goller—Wicomico County Tourism Manager

Kelly O'Brian-Rados—Director, Worcester County Rec and Parks

COUNTY ADMINISTRATORS

Laura Hurley—Wicomico County Administrator

Doug Taylor—Somerset County Administrator

Weston Young—Worcester County Administrator

CHAMBERS OF COMMERCE

Bill Chambers—President and CEO Greater Salisbury Chamber of Commerce

Buddy Ward—President Crisfield Area Chamber of Commerce

Dennis Williams—President of Princess Anne Chamber of Commerce

Lachelle Scarlato—Executive Director, Greater Ocean City Chamber of Commerce

LuAnn Johnson—Executive Director Snow Hill Area Chamber of Commerce

Lisa Taylor—Executive Director Pocomoke Area Chamber of Commerce

Larnet St. Amant—Executive Director Berlin Chamber of Commerce

Mike Dunn—President and CEO Greater Salisbury Committee

HIGHER EDUCATION

David Balcom—Vice President Institutional Advancement University of Maryland Eastern Shore

Dr. Ray Hoy or designee—President, Wor-Wic Community College

Dr. Michael Scott—Dean, Henson School of Science Salisbury University

William Burke—Director, Entrepreneurial Activities Salisbury University

GEOGRAPHIC INFORMATION SYSTEMS (ESRGC)

Erin Silva—Eastern Shore Regional GIS Cooperation (Salisbury University)

REGIONAL PUBLIC TRANSIT

Brad Bellacicco—Director, Shore Transit



2022-2023 CEDS COMMITTEE MEMBERSHIP CONT.

REPRESENTATIVE OF SALISBURY-WICOMICO REGIONAL AIRPORT

Tony Rudy—Airport Manager

WORKFORCE DEVELOPMENT BOARD

Leslie Porter-Cabell—Director, Lower Shore Workforce Alliance

Robert Hendricks—Business Engagement Manager

MARYLAND SMALL BUSINESS DEVELOPMENT CENTER—SALISBURY UNIVERSITY

John Hickman—Director, Eastern Region

EX OFFICIO

Alma Plummer—EDA Philadelphia Regional Officer

Scott Warner—Mid-Shore Regional Council

Mindie Burgoyne—Maryland Department of Commerce

Melissa Kelly—Office of U.S. Senator Chris Van Hollen

Kimberly Kratovil—Office of Senator Ben Cardin

Bill Reddish—Office of Congressman Andy Harris

CEDS FACILITATION

Gregory Padgham—Tri-County Council Executive Director

Monique Snyder—Tri-County Council Regional Communications Developer

Stephanie Wilkins—Tri-County Council Economic Development Coordinator



INTRODUCTION

The Tri-County Council for the Lower Eastern Shore of Maryland is a semi-independent rural-based state agency formed by an Act of the Maryland General Assembly in 2001. The purpose of the Council is to facilitate regional planning and economic development in Somerset, Wicomico and Worcester counties on the Lower Eastern Shore of Maryland. The Council membership is made up of municipal, county, and state elected officials as well as the county administrators from the three counties.

The Council is a designated Economic Development District (EDD) through the U.S. Economic Development Administration (EDA) of the U.S. Department of Commerce. As the region's EDD, the Council is responsible for developing a CEDS designed to identify regional priorities for economic development. In addition to acting as a planning tool for a region, the CEDS allows an EDD to engage with the EDA and other federal partners to receive infrastructure and technical assistance grants.

To receive designation as an EDD a multi-jurisdictional entity (such as the combined three counties of the Lower Shore) must have an EDA-approved CEDS and meet certain regional distress criteria identified in federal regulations. As a practical matter, the CEDS is required to undergo a complete reevaluation every five years with updates on an annual basis.



Worcester County Courthouse, circa 1894—Snow Hill



WHAT MAKES THE CEDS AN EFFECTIVE TOOL?

A well-developed CEDS has a purpose not served by single-jurisdiction planning documents. By its very nature, the CEDS process leverages the resources and input of all entities within a multi-jurisdictional unit, in this case Somerset, Wicomico and Worcester counties and their municipalities. The final document is truly regional in both its outlook and its analysis of hard data. The end result is a document that actually augments the planning process of individual jurisdictions by providing a comprehensive look at the total resources of a region.

More important, the CEDS is the result of a locally based, “regionally owned” planning process. Despite the requirement of EDA that there be a CEDS, the document and the process are not created or dictated by EDA. The regional priorities outlined in the CEDS are the result of deliberation by the CEDS stakeholder committee comprised of individuals and organizations who live or are located in the region and who have specific knowledge and experience rooted in the region and its communities.

The goal of the CEDS is to articulate input from all the citizens of the region. To this end the CEDS process leverages the involvement of the public, private, and non-profit sectors while providing a mechanism for stakeholders to engage in vigorous and meaningful conversation and debate about the economic direction of the region.



Salisbury—Wicomico County



In summation, the CEDS document is:

- *Comprehensive* in its approach as it employs the input and experience of persons and organizations with a wide range of expertise and backgrounds within the entire multi-jurisdictional entity;
- *Economic-focused* in that it surveys a broad range of specific economic sectors while considering trends and employing hard data in its analysis;
- *Development-oriented* as it considers the range of variables effecting economic activity and its impact and benefits to citizens, and
- *Strategy-based* in its underlying attention to economic resiliency and diversification while exploring the retention and further development of traditional and existing industries, all within a framework of regional planning.



Wenona Harbor—Deal Island, Somerset County



1st Street Boardwalk Entrance © Greater Ocean City Chamber of Commerce



© dglimages- stock.adobe.com

Finally, the ultimate goal of the CEDS and its process is to create a pathway to opportunities for all residents of the Lower Eastern Shore of Maryland, specifically:

- Excellent education and workforce development;
- Fulfilling and financially rewarding employment;
- Adequate and affordable housing;
- A sustainable environment;
- A high quality of life;
- A range of healthcare options.





VISION STATEMENT FOR THE LOWER EASTERN SHORE OF MARYLAND

- *To manifest a commitment to a prosperous, healthy and fulfilled life for all the citizens of the Lower Shore.*
- *To leverage the cultural and natural resources of the Lower Eastern Shore as the foundation for an instantly identifiable and unique regional identity.*
- *To create an economically vibrant region by utilizing flexible and resilient development strategies to create quality jobs, a trained workforce, thoughtful infrastructure investments and critical resource protection.*





SUMMARY BACKGROUND

The Eastern Shore of Maryland is a part of the U.S. state of Maryland that lies predominantly on the east side of the Chesapeake Bay and consists of nine counties. As of the 2010 census, its population was 449,226, with just under 8 percent of Marylanders living in the region. The term "Eastern Shore" distinguishes a territorial part of the state of Maryland from the Western Shore of Maryland, land west of the Chesapeake Bay.

The southern part of Maryland's Eastern Shore is called the Lower Eastern Shore and is characterized by its predominately rural landscape which features farmland, pine forests, marshes, and beaches. The counties comprising the Lower Eastern Shore are Somerset, Wicomico, and Worcester counties. Population centers include Berlin, Crisfield, Ocean City (particularly during summer months), Ocean Pines, Pocomoke City, Princess Anne, Salisbury (Metro Core includes Fruitland and Delmar, MD), and Snow Hill.

Numerous small streams and larger creeks can be found throughout the area. The Atlantic Ocean, Tangier Sound, Chincoteague, and Sinexpuxent bays and the Nanticoke, Wicomico, Manokin, and Big Annemessex rivers are the major waterways in this area. The Salisbury-Ocean City Wicomico Regional Airport in Salisbury is the only commercial airport on the entire Delmarva Peninsula. Piedmont Airlines, a regional airline, is headquartered in unincorporated Wicomico County, on the grounds of Salisbury-Ocean City Wicomico Regional Airport near Salisbury. Airports for private planes include the Crisfield Municipal Airport in Crisfield and the Ocean City Municipal Airport in Ocean City. The Port of Salisbury is located at the headwaters of the Wicomico River and in the heart of the City of Salisbury. The channel approach is an average of 14 feet at low tide and 19 feet at high tide. This port is the second busiest in Maryland.

According to the U.S. Conference of Mayors, the Salisbury MD-DE Metropolitan Statistical Area had the 7th fastest rate of job growth in the nation in 2016, with a 4.2% increase in employment. Perdue Farms, a multi-national poultry corporation, is headquartered in Salisbury. Other industries in the region include healthcare, accommodation and foodservice, electronic component manufacturing, pharmaceuticals, shipbuilding, and agriculture. Some of the major employers are: Salisbury University, Peninsula Regional Medical Center, Atlantic General Hospital, Encompass Health, Sysco Corporation, and the University of Maryland Eastern Shore. The labor market for the Lower Eastern Shore is 86,798 (as of May 2017).



Teackle Mansion, circa 1802—Princess Anne, Somerset County

SWOT ANALYSIS

The following SWOT analysis was developed through CEDS Committee discussions as well as the results of a 2018 regional focus group and branding survey. It is built upon a revised SWOT analysis conducted for the update of the 2016 CEDS document. The following is a summary of the key Strengths and Weaknesses of the region as well as the Opportunities and Threats the region may face in the future.

STRENGTHS

- Natural Resources
- Cost of Living
- Proximity to Major Markets
- Cultural Events
- Community Involvement Programs
- Higher Education Offerings
- Regional Cooperation
- Agribusiness
- Quality-of-life
- Sense of Community
- Moderate Climate
- Innovative Healthcare
- Tourism

WEAKNESSES

- Substance Abuse
- Limited Retail Amenities
- Quality of Public School Education
- Retention of Talent
- Public Transportation and Airport Services
- Insufficient Pool of Skilled Workers
- Aging Infrastructure

OPPORTUNITIES

- Growth of Entrepreneurial Base
- Diversification of Industries
- Regional Branding and Marketing
- Workforce Training
- Access to Capital
- Tourism Niche Markets – heritage tourism, sports tourism, etc.

THREATS

- Poorly Planned Growth and Urban sprawl
- Rising Sea Level
- Natural Disaster
- Economic Recession

The Lower Eastern Shore CEDS was developed to address regional priorities and needs. Consideration was given to priorities at the state, county, and local level that impact the Lower Eastern Shore.



INDUSTRY SUMMARIES

1. Resource Based Industries (Includes agriculture, forestry, fishing, & hunting)



The industries described in this segment include the agriculture, forestry, fishing and hunting sectors of the economy. The types of facilities and employees included in this grouping primarily engage in commercial fishing, farming, animal husbandry and the harvest of timber. These occupations are almost exclusively found in rural areas where there is easy access to natural resources like forests and rivers that naturally support habitats. The population of the Lower Eastern Shore has traditionally been known for its agricultural expertise to stimulate economic growth, provide employment and produce marketable goods from raw materials to the community.

The greatest advantage of the Lower Eastern Shore is its rural landscape and agricultural capabilities in very close proximity to 10 major metropolitan areas with very dense populations within a day's truck drive.

	NUMBER OF ESTABLISHMENTS				
	2012	2013	2014	2015	2016
Somerset	9	8	8	9	9
Wicomico	14	15	14	13	15
Worcester	10	12	12	12	13
LES	33	35	34	34	37

Source: U.S. Census Bureau, 2016 County Business Patterns



These close markets and a very robust transportation infrastructure once the trucks leave the Delmarva Peninsula are advantages that need to be further exploited. Conversely, the transportation infrastructure on the Peninsula itself needs improved and enhanced resilience. There are only two major transportation pathways (Route 13 for North-South and Route 50 for East-West). This has the potential for routine as well as catastrophic bottlenecks. While water and rail transport options exist, they are marginal at best. Air transportation is also not fully developed for this rapidly developing region. Integration of the emerging economic sector of environmental stewardship into the overall resource based industries ecosphere is a trend.

From 2012 to 2016, the number of establishments in the agriculture, forestry, fishing and hunting sectors remained relatively the same. Yet, the number of paid employees nearly doubled in that same time period from 165 to 238, meaning establishments are growing in size and productivity. Additionally, while the total number of farms in each of the three counties declined from 2012 to 2017, the total acres in harvested cropland rose from 149,567 to 161,071. This statistic indicates there are fewer individual farms but that those still in operation are expanding their acreage per farm. The aggregated value of these farms totaled to \$1.48 billion in 2017.



1. Resource Based Industries (Includes agriculture, forestry, fishing, and hunting) con't.

Looking forward, there remains a variety of ways for resource based industries to diversify and improve their farm management operations. Of concern is the growing popularity of solar arrays that take valuable tillable acreage from productive farm lands for generating electricity. Renewable energy providers, local governments and agriculture stakeholders must collaborate with each other in order to find a beneficial solution for both parties. Additionally, agricultural businesses are traditionally family-owned and operated, with each new generation taking on the planting and harvesting of crops, caretaking of animals, and other responsibilities. This can give rise to a degree of stagnant knowledge of farm production data analytics and the like. On the other hand, many multi-generational farmers on the Lower Eastern Shore themselves manage hundreds or even tens of thousands of acres using highly sophisticated equipment and methods. Animal feed and ethanol production have contributed to decades of high demand for commodity products such as wheat, corn and soybean, which in turn has driven decisions governing crop choice. Greater diversification of crops into areas such as organic vegetables and hemp could demand a higher market price than traditional commodities. Predictably, and despite increasing demand, market forces and other factors associated with production not traditionally associated with row-crops has continued to discourage efforts at such diversification.

The lack of significant agricultural growth in this region can perhaps be attributed to technological and regulatory barriers. Broadband Internet service is not available to most of the rural areas of the Lower Eastern Shore counties. The limited access to this increasingly critical resource further hinders agricultural collaboration, innovation, and growth. Additionally, regulations regarding land use and its access creates further restrictions on farmers. This in turn prevents farmers from diversifying their land use, even if it would be more profitable. Land access restrictions limit the areas in which to hunt and fish which also affects the tourists that come to the area to take advantage of the plethora of wildlife. Another hurdle that grain farmers are facing is lack of buyers for their crops. Locally, they can only sell grain as feed to the poultry industry. Alternatively, the remaining product must be exported to a buyer out of state.

The Lower Shore's forestry industry is highly integrated into other industries in the local economy, with the value of standing timber being multiplied when converted into further processed products. As a practical matter nearly all timber supplying local mills is grown locally, with the majority of the resulting products sold outside the region. Changes in the market and regulatory challenges have significantly impacted the industry locally. Changes in technology and energy sources, such as a proposed natural gas pipeline extension south along the U.S. Route 13 corridor (see pp. 17-18), though crucial to the long-term economic development of the region, would in turn create a ripple-affect to an existing combined-heat-and-power (CHP) system. A significant reduction in the demand for low value wood would in turn affect foresters managing for higher value saw timber, as well as a source of residual materials such as bedding for the poultry industry, mulch and paper. Responsive initiatives from the state, such as a proposed Economic Adjustment Strategy for the Forest Products Sector (EAS), would be a step toward the goal of retaining existing and traditional industries as part of an overall strategic approach to economic resiliency.



2. Utilities and Information Technology (includes energy & technology)



The industries described in this segment include companies that provide electric, wood, and gas heating systems, cooling systems, renewable energy programs, and Internet services in the Lower Eastern Shore region. Geothermal is still the most popular source of renewable energy in the region, yet the implementation of offshore wind-generated energy has recently experienced some investment. Broadband Internet access, in the rural areas of Somerset County especially, continues to limit the types of industries and employment opportunities there. The inability to access the Internet means individuals are unable to work from their residence. In turn lack of high speed internet services discourages companies from locating in the region. Increasing the availability of broadband Internet is critical in attracting entrepreneurs and start-ups to the area. Additionally, large scale farming reliant on sophisticated equipment may also be hindered by the availability of broadband internet resources.

In terms of Utilities and Information Technology, the

Lower Eastern Shore has both a unique geographic disadvantage and a unique advantage that need to be addressed. The main transmission lines coming from the north and ending at the southern tip of the Delmarva Peninsula have the potential for creating major economic disruptions if the supply is disrupted. The need for other pathways and/or for increased local generation is an ongoing concern. On the other hand, the proximity of the region to major urban metropolitan clusters of the Mid-Atlantic region provides a potential opportunity for back-office or back-up centers to be located here if the IT infrastructure can be improved and enhanced.

The highest percentage of those with broadband Internet access possess a Bachelor's degree or higher, with the lowest percentage being those with less than a high school diploma or equivalent. The Eastern Shore Regional GIS Cooperative (ESRGC) at Salisbury University is currently compiling more extensive research on the technological landscape of the Lower Eastern Shore. This research should be completed in the summer of 2019.

Over \$19 million was invested in 569 renewable energy projects in the Lower Eastern Shore in 2017. Energy efficiency projects in the region also contributed to

over 4 million kWh of electricity savings in 2017. Another encouraging finding from the energy industry is the total number of households on public assistance income in the past 12 months in all 3 counties has decreased from 2013 to 2017.





2. Utilities and Information Technology (includes energy & technology) con't.

The rising cost of producing electricity has contributed to the level of energy poverty on the Lower Eastern Shore. While the use of renewable energy in the production of electricity is a viable option, there remain concerns regarding reliability due to its dependence on weather patterns. These variables limit its impact on energy prices and create more instability within the grid. Renewable energy also requires large plots of land to set up and monitor the energy-producing technology such as solar. This creates competition for cleared land with the agriculture industry as well as additional maintenance to ensure the panels remain functional throughout their lifespans.



Worchester Technical High School © Worcester County Public Schools

On the other hand, the renewable energy industry as a whole tends to create high-tech jobs that positively affect the region's workforce and economic development, while remaining up-to-date with the nation's movement towards more environmentally friendly energy sources.

Investment in nuclear energy continues to face political challenges, with the main controversy being the safety of nuclear power plants. However, the cheaper costs associated with producing nuclear energy is a critical benefit and bargaining point for utility companies and politicians in favor of nuclear energy use.

NUMBER OF HOUSEHOLDS WITH PUBLIC ASSISTANCE					
	2013	2014	2015	2016	2017
Somerset	213	198	232	251	308
Wicomico	1083	1167	1068	1133	1068
Worcester	659	647	631	432	448
LES	1955	2012	1931	1816	1824

RENEWABLE ENERGY - 2017				
	Total Projects	Project Costs	Project Percentage	Cost Percentage
Somerset	66	\$2,644,202	11.6%	13.3%
Wicomico	273	\$8,767,433	48.0%	44.2%
Worcester	230	\$8,424,769	40.4%	42.5%
LES	569	\$19,836,404	-	-

Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-yr. Estimates

A specific energy sub-sector with growing economic importance for the region is natural gas. This growing importance requires a more in-depth look at how this energy option fits into the region's economy. Existing economic development on the Lower Eastern Shore of Maryland is concentrated in a highly disproportionate manner. Relatively speaking there are two economic clusters in the region. They are Salisbury (Wicomico County) in the northwest quadrant of the region and Ocean City/Berlin/Ocean Pines (Worcester County) in the northeast quadrant of the region. To varying degrees each quadrant has access to natural gas pipeline infrastructure. The two southern quadrants of the region (all of Somerset County and the southern portion of Worcester County) do not have access to natural gas pipeline infrastructure.



2. Utilities and Information Technology (includes energy & technology) con't.

Consequently, there is a marked absence of an economic cluster in those quadrants relative to the two northern quadrants. Extension of natural gas pipeline infrastructure from Salisbury south along the US 13 transportation corridor would significantly balance the distribution of this resource. This in turn would lead to the creation of two additional economic clusters in the region (Princess Anne, Somerset County) for the first stage of pipeline extension and Pocomoke City (Worcester County) for the second stage. Later incremental extensions east along MD State Highway 413 to communities including Westover, Marion Station and Crisfield would further improve distribution of this energy resource.

Such an extension would have the following consequences:

- More proportionate distribution of economic development in the region
- Increased choices of energy sources
- Less expensive energy source for persons of limited means
- Fewer emissions than other fossil fuel generated electrical sources
- Carbon offsets
- Improved resiliency of economy following natural disasters
- Ability to convert refuse to natural gas and feed distribution system
- Grant availability to help subsidize installation and first five years of implementation

HOUSEHOLDS WITHOUT INTERNET - 2017			
	County Total	No Internet Total	Percentage
Somerset	19,771	2,814	14.2%
Wicomico	97,919	13,424	13.7%
Worcester	50,781	3,860	7.6%
LES	168,471	20,098	11.9%

HOUSEHOLDS WITHOUT A COMPUTER - 2017			
	County Total	No Computer Total	Percentage
Somerset	19,771	2,915	14.7%
Wicomico	97,919	7,872	8.0%
Worcester	50,781	5,034	9.9%
LES	168,471	15,821	9.4%

ACCESS TO BROADBAND INTERNET - 2017			
	County Total	Broadband Total	Percentage
Somerset	19,771	13,850	70.1%
Wicomico	97,919	76,164	77.8%
Worcester	50,781	41,446	81.6%
LES	168,471	131,460	78.0%

Sources: U.S. Census Bureau, American Community Survey, Types of Internet 2013-2017, MEA Smart Investment Dashboard, U.S. Census Bureau, 2013-2017 American Community Survey 5-yr. Estimates



3. Heavy Industries (includes construction, manufacturing, transportation and warehousing)



The industries described in this segment include construction, manufacturing, transportation, and warehousing. The construction and transportation industries include both commercial and residential construction and transportation. The manufacturing sector is divided by type of occupation within the manufacturing sector, including management, service, sales, production and maintenance. The warehousing industry is extremely small in the region, with only three privately-owned public warehouses in Wicomico County, one in Worcester County, and none in Somerset County.

The Lower Eastern Shore is in the middle of a 50-year economic transition. As a consequence some heavy industries may gradually give way to technology-based economic sectors. This does not mean a divestment in heavy industries. Instead, it indicates the region will need to prepare for the differing economic and workforce development requirements of the emerging sectors.

The construction industry had over 570 businesses and employed 3,545 people in 2017. Additional data on the construction industry specific to the Lower Eastern Shore region is available from various fee-based online sources.

The resiliency of overland freight transportation is low due to limited north-south and east-west corridors. Rail service, while important to the agricultural sector, suffers from tracks in need of repair and upgrading.

Waterborne commerce is also important for agriculture as well as the construction industries (aggregate), however, the region's waterways need more frequent dredging. The upcoming off-shore wind farm construction and future operations and maintenance of the turbines may increase the importance of West Ocean City for waterborne commerce. The region's commercial airport, the Salisbury-Ocean City-Wicomico Regional Airport, has commercial air service, a FedEx station and private FBO activity.

The manufacturing industry within the three counties varies considerably. Somerset County has increased the number of civilians employed by the manufacturing sector from 2013 to 2017. Management occupations within the manufacturing industry substantially decreased in Somerset County while maintenance and production occupations significantly increased. Yet, both Wicomico and Worcester have decreased their total workforce in the same time period.

An issue in this industry grouping, as in others, is the lack of broadband Internet access to rural areas. This hinders the ability to introduce new technology reliant on Internet connectivity to the area. An aging workforce in the manufacturing industry is a concerning trend, with the ability to attract workers to available jobs being one of the most significant issues. To mitigate this, manufacturing stakeholders need to revamp their recruiting strategy by using job training and development programs to fill these vacant positions. Employing a more demographically diverse workforce will bring a fresh perspective for business development and innovation to the industry. Digitalization, artificial intelligence, and virtual reality will drive manufacturing improvements in processes and engineering.



3. Heavy Industries (includes construction, manufacturing, transportation and warehousing) con't.

Manufacturers have also begun to vertically integrate into distribution and retail channels. These business model changes will impact other distributors and retailers that rely on these products to fill their trucks and stock their shelves. As a consequence, distributors will face higher transportation costs associated with underutilized load capacity and backhaul. Retailers' implementation of various techniques of diversification is a response to the low-cost vertical integration strategies of manufacturers.

NUMBER OF EMPLOYEES IN MANAGEMENT OFFICES					
	2013	2014	2015	2016	2017
Somerset	167	100	69	60	57
Wicomico	1100	1154	1069	1210	1119
Worcester	253	240	300	329	288
LES	1520	1494	1438	1599	1464

NUMBER OF EMPLOYEES IN MAINTENANCE AND PRODUCTION OPERATIONS					
	2013	2014	2015	2016	2017
Somerset	44	7	65	45	135
Wicomico	374	389	376	374	288
Worcester	244	191	123	18	39
LES	662	587	564	437	462

NUMBER OF CIVILIANS EMPLOYED IN MANUFACTURING					
	2013	2014	2015	2016	2017
Somerset	345	408	395	253	362
Wicomico	4729	4694	4618	4801	4422
Worcester	1094	1079	1089	1002	1010
LES	6168	6181	6102	6056	5794

MANUFACTURING INDUSTRY										
	2014		2015		2016		2017		2018	
	Establishments	Avg Employee	Establishments	Avg Establishments	Establishments	Avg Employees	Establishments	Avg Employees	Establishments	Avg Employees
Somerset	14	188	13	198	12	210	14	250	16	245
Wicomico	98	3608	97	3448	97	3005	97	2940	94	2950
Worcester	46	672	46	657	42	662	46	698	47	712
LES	158	4468	156	4303	151	3877	157	3888	157	3907

CONSTRUCTION										
	2014		2015		2016		2017		2018	
	Establishments	Avg Employee	Establishments	Avg Employee	Establishments	Avg Employee	Establishments	Avg Employee	Establishments	Avg Employee
Somerset	67	303	69	287	66	279	66	337	64	334
Wicomico	281	1858	269	1926	260	1998	275	2071	289	2219
Worcester	237	1005	240	1095	236	1150	233	1137	236	1162
LES	585	3166	578	3308	562	3427	574	3545	589	3715

Sources: Bureau of labor Statistics, U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates, U.S. Census Bureau Means of Transportation 2013-2017 American Community Survey



4. Tourism and Leisure (including accommodation and food services, arts, entertainment, and recreation)



Tourism and leisure on the Lower Eastern Shore consists of travel accommodations, food services, arts, entertainment and recreation. Travel accommodations include hotels and motels, bed-and-breakfast inns and RV parks. Food services include food service contractors, bars, restaurants, caterers, special food services and mobile food services. Tourism and leisure has been a key component to the regional economy for many years due to the large diversity of tourism offerings. This in turn has provided the opportunity to attract many individuals with a variety of interests. Ocean City is the most well-known summer resort town in the industry; however, there are a growing number of sports, natural, cultural, and historical tourism attractions.

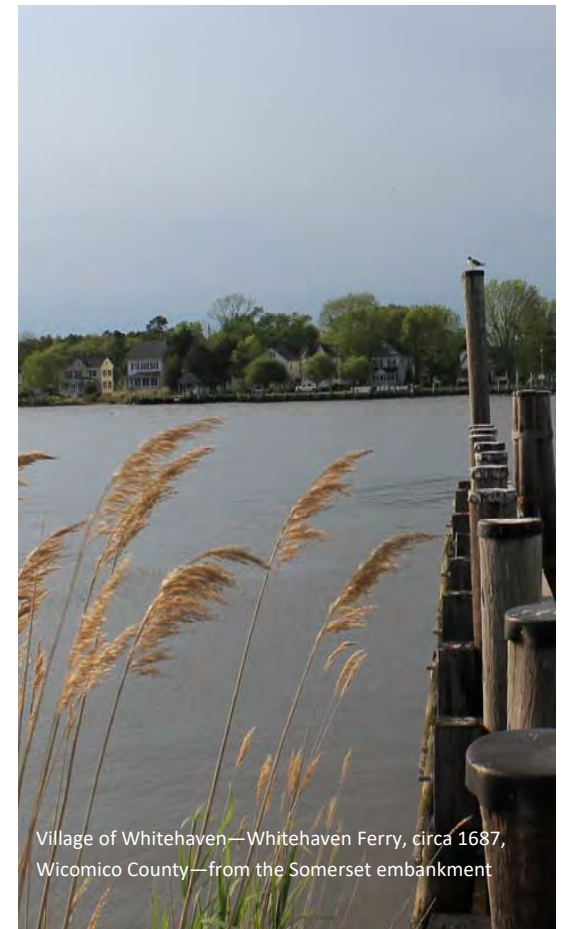
Undoubtedly the Lower Eastern Shore of Maryland is one of the most attractive playgrounds for

the Mid-Atlantic Region. From the beaches to the rivers, from the bustling nightlife in Ocean City to the quiet elegance and serenity of historic landscapes and the state and national parks, there is a host of outstanding options for all segments of the region's population. The region is now exploring ways to leverage these assets in a more deliberate and data driven way to extend and enhance the high and shoulder seasons.

According to the U.S. Census, from 2012 to 2016 the overall number of tourism and leisure establishments in the region remained relatively constant; however, there was a 57% increase in the number of food service contractor establishments and a 36% increase in the number of special food service establishments. Tourism is weighted very heavily in Worcester and Wicomico County compared to Somerset County. In 2016, there were 123 hotel and motel establishments in the region and 95% of them were located in either Worcester or Wicomico County, with 79% of them being located in Worcester County alone. Out of all the restaurants in the region, 96% of them were located in Worcester or Wicomico County, with 63% of them located in Worcester County alone.

Ocean City is the primary reason tourism destinations are weighted so heavily in Worcester County. It should be noted the

total number of paid employees in Worcester County increased by roughly 6% from 2012 to 2016. This is a good sign for the region. As expected, the majority of employees are located in Worcester and Wicomico Counties.



Village of Whitehaven—Whitehaven Ferry, circa 1687, Wicomico County—from the Somerset embankment



4. Tourism and Leisure (including accommodation and food services, arts, entertainment, and recreation) con't.

The year-over-year change in number of rooms sold in the region in 2018 decreased for the first time in five years (-2.9%) and the year-over-year change in the number of rooms available increased in 2018 by 0.9%. The increase in the number of rooms available, but decrease in the number of rooms sold indicates there were a larger number of vacant rooms in 2018 than any of the five previous years. The year-over-year change in room price also increased in 2018 by 1%.

The tourism and leisure industry within the region does well during summer months, particularly on the weekends; however, the lack of fresh marketing promotions and experiential tourism attractions has caused a downturn in tourism during the offseason in the region. As opposed to simply visiting the beach Millennials in particular are attracted to areas offering experiences not found elsewhere.



"Almodington" circa 1743 - Manokin River Historic District , Somerset County

Marketing tactics therefore need to be adjusted to address changing demand and address additional trends that should be implemented within the region to attract a more diverse group of visitors. This can be done in a variety of ways, including boat excursions, sports marketing, and agricultural tourism. An increase in experiential tourism will also address the issue of midweek weakness by providing a wider breadth of activities for individuals and families of all ages. There is also a push to increase the number of large events hosted in the region in order to further expand the range of attractions. Tourism and leisure has traditionally been viewed as the backbone of economic development on the Lower Eastern Shore. Because of its high performance over a long period of time it is possible it may have previously escaped a more detailed analysis. As with any segment of the economy it is important to address not only the challenges in this area, but also build off its strengths, particularly as competition for tourists continues to increase.

ROOM RATE PERCENT CHANGE					
	2014	2015	2016	2017	2018
Somerset	-	-	-	-	-
Wicomico	3.80%	1.50%	1.60%	2.80%	-
Worcester	1.00%	2.20%	1.00%	5.60%	-
LES	1.50%	2.10%	0.80%	2.60%	-

NUMBER OF RESTAURANTS AND EMPLOYEES										
	2012		2013		2014		2015		2016	
	Establishments	Employees	Establishments	Employees	Establishments	Employees	Establishments	Employees	Establishments	Employees
Somerset	24	258	21	241	19	266	20	241	17	248
Wicomico	177	3628	175	3538	172	3566	167	3608	163	3507
Worcester	289	3211	293	3447	303	3481	318	3476	303	3797
LES	490	7097	489	7226	494	7313	505	7325	483	7552

Sources: U.S. Census Bureau County Business Patterns; visitmaryland.org



4. Tourism and Leisure (including accommodation and food services, arts, entertainment, and recreation) con't.

FOOD AND DRINK SERVICES										
	2012		2013		2014		2015		2016	
	Establishments	Employees	Establishments	Employees	Establishments	Employees	Establishments	Employees	Establishments	Employees
Somerset	24	258	21	241	20	268	21	281	19	358
Wicomico	189	3819	190	3774	185	3820	180	3878	178	3721
Worcester	310	3505	314	3730	320	3775	338	3743	324	4076
LES	523	7582	525	7745	525	7863	539	7902	521	8155

SPECIAL FOOD SERVICES										
	2012		2013		2014		2015		2016	
	Establishments	Employees	Establishments	Employees	Establishments	Employees	Establishments	Employees	Establishments	Employees
Somerset	0	0	0	0	1	0-19	1	20-99	1	100-249
Wicomico	10	128	11	154	10	166	9	186	11	116
Worcester	4	61	3	20-99	3	20-99	4	45	7	56
LES	14	189	14	154	14	166	14	231	19	172

NUMBER OF HOTELS										
	2012		2013		2014		2015		2016	
	Establishments	Employees	Establishments	Employees	Establishments	Employees	Establishments	Employees	Establishments	Employees
Somerset	5	8	5	0-19	5	0-19	5	16	6	10
Wicomico	19	240	19	270	20	289	22	303	20	284
Worcester	99	1807	99	1834	100	1758	95	1788	97	1825
LES	123	2055	123	2104	125	2047	122	2107	123	2119

ROOM DEMAND AND SUPPLY						
	2014		2015		2016	
	Room Demand Change	Room Supply Change	Room Demand Change	Room Supply Change	Room Demand Change	Room Supply Change
Somerset	-	-	-	-	-	-
Wicomico	5.10%	0.00%	7.80%	0.00%	8.30%	0.00%
Worcester	4.50%	0.00%	7.30%	1.50%	4.20%	1.20%
LES	4.70%	0.10%	7.50%	1.30%	4.80%	1.00%

	2017		2018	
	Room Demand Change	Room Supply Change	Room Demand Change	Room Supply Change
Somerset	-	-	-	-
Wicomico	1.10%	0.00%	-	0.00%
Worcester	2.90%	1.10%	-	1.40%
LES	2.60%	0.90%	-	1.10%

Sources: U.S. Census Bureau, County Business Patterns, Visit Maryland. Org



5. FIRE (Finance, Insurance, Real Estate)



The industries described in this segment include finance, insurance and real estate. The finance industry consists of all types of financial institutions, including commercial banks, savings institutions, credit unions, non-depository credit intermediaries, brokerages, investment banks, portfolio managers, and other activities related to credit intermediation. The insurance industry consists of insurance carriers of all kinds and insurance agencies and brokerages. The real estate industry consists of various lessors of real estate, offices of real estate agents and brokers, and any activities related to real estate such as property managers.

The Lower Eastern Shore is not particularly known for its strong finance, insurance and real estate industries. However, there is an opportunity for growth in these industries, particularly in real estate, due to the large amount of tourism in region.

From 2012 to 2016 the number of financial establishments in the region remained constant with only three fewer establishments. In contrast the number of paid employees increased by roughly 25%, which indicates the establishments are growing in size and productivity. From 2012 to 2016 the number of insurance establishments decreased by 4.7%, but the number of paid employees increased by 5.2%. Out of the total population in the region with private health insurance alone or in combination in 2017, 77% of the population has employer-based health insurance, 20% has direct-purchase health insurance and 3% has Tricare/military health insurance. Out of the total population living below the 138% poverty threshold, 31% of them have private health insurance coverage alone or in combination, which indicates the remaining 69% have either public health insurance coverage or no coverage at all.

There has been an upward trend in the number of homes sold and the average sale price in the region. The number of active and new listings of homes in the region has remained constant the last five years, but the number of homes sold in 2018 was 3,848, an increase of 34% from 2014. This is a positive indicator for the housing market in the region because the number of homes being sold has increased even though the number of homes

listed remained constant. The average sales price in 2018 was \$235,466, which was a 13% increase from 2014. This indicates more homes are going to closing and at a higher selling price overall.

Moving forward, there are concerns regarding the ability of the finance and insurance industries to attract young workers from within the area or to attract them to the region. As a result, many students are not staying in the area following graduation from post-secondary schools such as Wor-Wic Community College, University of Maryland Eastern Shore, and Salisbury University. Because of the higher median wage and buying power of college graduates the financial, insurance and real estate industries rely on them as clientele. In order to keep these students in the area, business leaders need to work with institutions of higher education to recruit students looking for a job post-graduation. There is also a concern regarding the commercial real estate industry. Some observers note that the perceived value of a number of commercial real estate assets are lower than their list prices. This could become a cause for concern if the economy cools down. There is also an upward trend on auto and health insurance premiums in the region.



5. FIRE (Finance, Insurance, Real Estate) con't.

HEALTH INSURANCE (PRIVATE COVERAGE) - 2017						
	Employer Based	Percent Total	Direct-Purchase	Percent Total	Tricare/Military	Percent Total
Somerset	10624	48.70%	2109	9.70%	481	2.20%
Wicomico	53712	53.30%	12528	12.40%	2398	2.40%
Worcester	27936	54.90%	9334	18.30%	1306	2.60%
LES	92272		23971		4185	

NUMBER OF FINANCIAL AND INSURANCE ESTABLISHMENTS					
	2012	2013	2014	2015	2016
Somerset	38	38	34	33	31
Wicomico	299	293	270	262	267
Worcester	242	233	258	237	237
LES	579	564	562	532	535

NUMBER OF FINANCIAL EMPLOYEES					
	2012	2013	2014	2015	2016
Somerset	91	89	85	76	80
Wicomico	1182	1221	1171	1169	1183
Worcester	466	447	511	572	538
LES	1739	1757	1767	1817	1801

NUMBER OF REAL ESTATE ESTABLISHMENTS					
	2012	2013	2014	2015	2016
Somerset	124	123	130	121	115
Wicomico	838	843	850	889	891
Worcester	1104	1108	1122	1165	1182
LES	2066	2074	2102	2175	2188

NUMBER OF REAL ESTATE EMPLOYEES					
	2012	2013	2014	2015	2016
Somerset	44	20-99	20-99	34	33
Wicomico	472	425	424	469	442
Worcester	385	378	370	409	443
LES	901	803	794	912	918

NUMBER OF HOUSEHOLDS ABOVE OR BELOW POVERTY THRESHOLD (PRIVATE COVERAGE) - 2017				
	Below 138% Poverty Threshold	Percent Below Threshold	At or Above 138% Poverty Threshold	Percent Above Threshold
Somerset	1858	28.80%	8857	66.90%
Wicomico	7087	31.50%	55552	73.50%
Worcester	2401	30.10%	33283	77.70%
LES	11346		97692	

NUMBER OF HOMES SOLD					
	2014	2015	2016	2017	2018
Somerset	176	204	225	206	232
Wicomico	1278	1203	1123	1029	926
Worcester	2338	2385	2089	1981	1759
LES	3792	3792	3437	3216	2917

AVERAGE HOME SALES PRICE					
	2014	2015	2016	2017	2018
Somerset	\$112,085.00	\$92,035.00	\$115,440.00	\$122,937.00	\$127,106.00
Wicomico	\$148,059.00	\$155,771.00	\$151,910.00	\$161,505.00	\$165,412.00
Worcester	\$250,127.00	\$255,135.00	\$262,855.00	\$274,118.00	\$284,503.00
LES	\$170,090.33	\$167,647.00	\$176,735.00	\$186,186.67	\$192,340.33

Sources: U.S. Census Bureau, County Business Patterns, American Fact Finder, Census Bureau, American Community Survey; Private Health Insurance Coverage, Bright Multiple Listing Service;

Coastal Association of REALTORS



6. Services (includes professional, scientific and technical services; management of companies and enterprises; administrative and support services; waste management and remediation services)



The services industry described in this segment consists of professional, scientific, and technical services; management of companies and enterprises; administrative and support services, and waste management and remediation services. Professional services include accountants and lawyers while scientific and technical services range from electronics engineering technicians to computer user support specialists. Network administrators and customer services representatives are examples of administrative and support services positions. Maintenance and repair workers, inspectors, testers, and sorters are examples of waste management and remediation services.

As mentioned in previous industry and economic activity sector discussions, the proximity of the

Lower Eastern Shore of Maryland to major Mid-Atlantic Metropolitan areas offers unique opportunities to grow the Services sector. An obvious way to do this is through the establishment of back-office and backup operations for entities located in said major metropolitan areas.

Professional and business related services have 730 establishments, which is the largest number of service establishments in the region. Education and health related services have 534 establishments, while other services make up the remaining 414 establishments. Although education and health related services do not have the largest number of establishments, they do have the largest number of annual average employees of 12,501. The annual average number of employees for professional and business related services is 5,929 and all other services in the region have an annual average of 2,629 employees. Peninsula Regional Medical Center (PRMC) is the largest employer of services in the region with roughly 2,900 employees. Network Administrators have the highest median hourly wage in the region at around \$35 an hour. Accountants and electronics engineering technicians have the second highest median hourly wage at around \$28 an hour. The average weekly professional and business related services wage is \$936, while the average weekly wage for education and health related services is \$844. The average weekly wages for all remaining services is \$572 .

Healthcare in the region provides an opportunity for growth in the services industry due to the aging population and growth in healthcare innovation. Healthcare innovation also provides an opportunity to increase entrepreneurial enthusiasm and support in areas such as Salisbury and Berlin. While the presence of healthcare innovation is exciting, such entrepreneurial enthusiasm needs to manifest in other areas of the Lower Eastern Shore as well. The aging population in the region creates an opportunity for the services industry to focus on expanding and diversifying their offerings for this demographic. Peninsula Regional Medical Center's prominence in the healthcare industry also provides an opportunity to attract top physicians and nurses, as well as patients seeking their expertise. Of concern for the services industry is the decreasing number of qualified vocational and trade workers. Furthermore, the gap between what is taught in universities and what employers are expecting graduates to know as they enter the workforce continues to increase.

6. Services (includes professional, scientific and technical services; management of companies and enterprises; administrative and support services; waste management and remediation services) con't.

PROFESSIONAL AND BUSINESS SERVICE ESTABLISHMENTS					
	2014	2015	2016	2017	2018
Somerset	46	42	38	38	41
Wicomico	424	423	430	423	420
Worcester	238	247	269	273	284
LES	708	712	737	734	745

PROFESSIONAL AND BUSINESS SERVICE EMPLOYMENT					
	2014	2015	2016	2017	2018
Somerset	211	176	146	146	193
Wicomico	4178	4225	4285	4357	4364
Worcester	1429	1425	1426	1502	1530
LES	5818	5826	5857	6005	6087

EDUCATION AND HEALTH SERVICE ESTABLISHMENTS					
	2014	2015	2016	2017	2018
Somerset	56	56	57	60	62
Wicomico	315	318	318	326	327
Worcester	152	148	148	149	150
LES	523	522	523	535	539

EDUCATION AND HEALTH SERVICE EMPLOYEES					
	2014	2015	2016	2017	2018
Somerset	1044	1088	1107	1172	1135
Wicomico	8482	8897	9175	9028	9245
Worcester	2189	2161	2301	2508	2566
LES	11715	12146	12583	12708	12946

ANNUAL AVG # OF EMPLOYEES IN PROFESSIONAL/BUSINESS SERVICE					
	2013	2014	2015	2016	2017
Somerset	235	211	176	146	146
Wicomico	4182	4178	4225	4285	4357
Worcester	1488	1429	1425	1426	1502
LES	5905	5818	5826	5857	6005

ANNUAL AVERAGE NUMBER OF EMPLOYEES IN EDUCATION AND HEALTH SERVICES					
	2013	2014	2015	2016	2017
Somerset	1069	1044	1088	1107	1172
Worcester	8643	8482	8897	9175	9028
Wicomico	2130	2189	2161	2301	2508
LES	11842	11715	12146	12583	12708

ANNUAL AVERAGE NUMBER OF EMPLOYEES IN OTHER SERVICES					
	2013	2014	2015	2016	2017
Somerset	155	150	147	102	73
Wicomico	1772	1714	1618	1509	1488
Worcester	743	702	681	772	758
LES	2670	2566	2446	2383	2319

AVERAGE WEEKLY WAGES FOR PROFESSIONAL AND BUSINESS RELATED SERVICES					
	2013	2014	2015	2016	2017
Somerset	750	814	885	710	675
Wicomico	1300	937	1106	1227	1320
Worcester	736	737	775	813	775
LES	2786	2488	2766	2750	2770

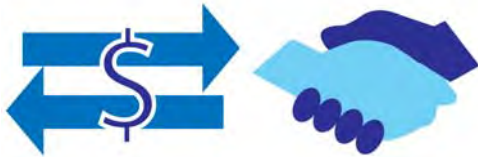
AVERAGE WEEKLY EARNINGS FOR EDUCATION AND HEALTH SERVICES					
	2013	2014	2015	2016	2017
Somerset	634	673	830	700	700
Wicomico	898	938	930	950	971
Worcester	788	830	872	862	831
LES	2320	2441	2632	2512	2502

AVERAGE WEEKLY WAGES FOR OTHER SERVICES					
	2013	2014	2015	2016	2017
Somerset	444	494	558	587	623
Wicomico	509	487	511	517	515
Worcester	506	516	560	577	574
LES	1459	1497	1629	1681	1712

Sources: Maryland Department of Labor, Licensing, and Regulation Quarterly Census of Employment and Wages



7. Trade (includes wholesale and retail)



The industries described in this segment relate to the wholesale and retail sectors of the economy. The type of facilities in this grouping can vary from clothing and clothing accessories stores, to motor vehicles and parts dealers, to food and beverage stores. These occupations are popular among all areas and are vital components in boosting the economy. The Lower Eastern Shore region has various retail stores and sectors, but expanding these offerings would allow them to employ more people. This would stimulate economic growth in the area by creating a ripple effect in the form of vendor payments, real estate vacancy rate reduction, fiscal impacts, etc.

From 2014 to 2016, the number of retail establishments remained relatively the same, with only the occasional decrease in certain subsectors. The number of paid employees mimicked that trend by remaining relatively the same with the occasional decrease in subsectors. This was further reflected in the number of establishments.

The subsector seeing the greatest decrease in the number of establishments and paid employees was electronics and appliance stores. The Lower Eastern Shore had a total of 37 electronics and appliance stores with around 229 paid employees in 2014, but dropped to 26 establishments with around 187 paid employees by 2016. These findings can in part be attributed to the rise in online retail outlets.

The demographic classification of business owners also changed from 2007 to 2012. In Somerset and Wicomico County there was an increase in female owned firms, with an additional 3 and 19 female owned firms respectively from 2007 to 2012. However, in that same time span there was a decrease of 59 female owned firms in Worcester County. In addition, Wicomico County saw an additional 152 veteran owned firms from 2007 to 2012, while Somerset and Worcester County remained the same in number of

veteran owned firms.

Looking forward, there remains a variety of ways for trade based industries to stimulate growth. Of concern is the growing popularity and trend towards e-commerce shopping compared to brick and mortar retailers. Big box stores should aim toward providing experiences (an added value) to attract people to shop at retail stores instead of online. Retail stores should also use technology to help impact direct sales and attract customers. Two ways technology can help business owners implement these strategies is by using online outlets to help encourage in-person shopping and using “ShopBots” to influence consumer behavior. These techniques can be used to discover consumer behavior and trends, allowing business owners to offer items and products that customers want to buy.



Boardwalk Entrance © Greater Ocean City Chamber of Commerce



7. Trade (includes wholesale and retail) con't.

Some of the issues affecting industry growth in the trade sector are seasonality and infrastructure. Many persons lack a post-secondary education, resulting in lower disposal income to spend in the trade industry. In addition, there is insufficient infrastructure to promote the growth of the trade industry. Though the region boasts ample land and open space large investment is required to start the process of creating new infrastructure. On the other hand, redevelopment and upgrading of existing trade industry infrastructure would promote economic growth in this area.



Discovery Center— Pocomoke City, Worcester County

NUMBER OF WHOLESALE AND RETAIL ESTABLISHMENTS					
	2012	2013	2014	2015	2016
Somerset	59	61	54	54	52
Wicomico	388	387	394	388	376
Worcester	401	407	409	396	384
LES	848	855	857	838	812

NUMBER OF PAID WHOLESALE AND RETAIL EMPLOYEES					
	2012	2013	2014	2015	2016
Somerset	412	423	452	440	441
Wicomico	6516	6745	6558	6621	6683
Worcester	3405	3375	3648	3584	3676
LES	10333	10543	10658	10645	10800

FEMALE OWNED FIRMS				
	Somerset	Wicomico	Worcester	LES
2007	21	31	95	147
2012	24	50	36	110

VETERAN OWNED FIRMS				
	Somerset	Wicomico	Worcester	LES
2007	3	32	N/A	35
2012	3	184	30	217

Sources: U.S. Census Bureau, County Business Patterns



8. Government and Nonprofit (includes education, healthcare, and social assistance)



The industries described in this segment include the education, healthcare, and social assistance sectors of the economy. The types of employees included in this grouping are focused on providing assistance to other groups and individuals. This industry also looks at the individuals who use these various sectors. The Lower Eastern Shore region employs various facilities of all sizes



within this industry, ranging from the institutions of higher education to healthcare and housing assistance. Collectively the number of jobs supported by this sector is greater than any other segment in the region's economic landscape.

The Lower Eastern Shore region has three higher education facilities: Salisbury University, University of Maryland Eastern Shore (UMES), and Wor-Wic Community College. From 2013 to 2017 the number of undergraduates enrolled in these schools has decreased every year. Salisbury University saw a decrease in undergraduate enrollment from 8,004 to 7,782, UMES saw 3,530 to 2,861, and Wor-Wic saw 3,416 to 3,109 during that time period. However, Salisbury University has seen the number of graduate and professional enrollments steadily increase from 639 to 932 during the same period. High school graduation rates remained constant during this time at 87%. In the healthcare subsector the Lower Eastern Shore region has seen an improvement in emergency department visits related to mental health and addiction-related conditions. From 2012 to 2017 the amount of emergency department visits related to mental health conditions decreased from 17,585 to 9,097 respectively. Over the same time period of 2012 to 2017 the number of emergency department visits related to addiction-related conditions decreased from 5,525 to 5,159 respectively.

Going forward, there are a variety of ways the government and nonprofit industry can promote economic growth. One way is through developing the most effective way to connect the school systems with the private sector. One important method is to increase apprenticeship opportunities for students or individuals seeking a career change to gain industry experience. If the nonprofit sector can tap into the growing population of students enrolled in CTE courses it can help to coordinate both sectors.



8. Government and Nonprofit (includes education, healthcare, and social assistance) con't.

Further collaboration between educational facilities and the private sector will prove highly beneficial to the workforce needs of the region. Closer coordination would result in greater responsiveness on the part of the educational sector with regard to program development in line with the needs of employers. In turn there would be greater opportunities for private sector employers to articulate their specific needs to the educational sector. Collaborative efforts should include highlighting the positive aspects of trade schools. These include immediate employment and wage earning coupled with the option to continue on a path to additional higher education at any time in the future.



Student Services Center in Princess Anne, Somerset County © University of Maryland Eastern Shore

An aging population in the region can be attributed to the challenges faced by nonprofits and healthcare. A disproportionate aging population has created a shortage of physicians specializing in elderly care. In addition, for the non-profit sector the value of donations is increasing while the number of actual donations is decreasing. This in part related to age demographics in that younger persons generally believe it is more beneficial to donate their time rather than money.



Pocomoke City High School, Worcester County © Worcester County Public Schools

UNDERGRADUATE ENROLLMENT					
	2013	2014	2015	2016	2017
Salisbury University	8,004	7,997	7,849	7,861	7,782
UMES	3,530	3,570	3,742	3,277	2,861
Wor-Wic	3,416	3,104	3,128	3,098	3,109
LES	14,950	14,671	14,719	14,236	13,752

HIGH SCHOOL GRADUATION RATE					
	2014	2015	2016	2017	2018
Somerset County	85.57%	87.98%	82.58%	85.95%	84.53%
Wicomico County	84.44%	83.53%	81.51%	83.79%	83.22%
Worcester County	91.15%	93.10%	91.65%	91.79%	92.53%
LES Average	87.05%	88.20%	85.25%	87.18%	86.76%

Sources: Maryland State Department of Education; Salisbury University; University of Maryland Eastern Shore; Wor-Wic Community College



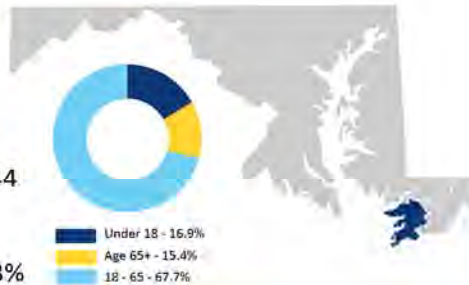
SOMERSET COUNTY

POPULATION

2010 - 26,470
 2018 Est. - 25,675
 2020 Proj. - 28,300
 2030 Proj. - 29,350

Median Age - 37
 Age 65+ - 3,958
 Age Under 18 - 4,344
 Minority - 46.89%

Male % - 53.57%
 Female % - 46.43%



HOUSING

2017 Median Sales Price
\$108,426

Vacant Units
26.22%*

Occupied Units
73.78%

ECONOMIC

Per Capita Personal Income 2017
\$31,327

Free Reduced Meals
60.27%

Percentage of Families Whose last 12 Month Income is Below Poverty Line
18.0%

Average Weekly Wage
\$862

County Property Tax
.75%

Food Insecurity Rate
18.3%

Sources
 U.S. Census Annual Estimates of Resident Population Maryland.gov
 U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates
 U.S. Bureau of Economic Analysis, 2017 Regional GDP and Personal Income
 Maryland State Department of Assessments and Taxation
 MD Department of Commerce

Industry	Establishments	Annual Avg. Empl.	Emp.%	Avg. Wkly. Wage
Government				
Federal Government	12	48	.7	951
State Government	10	1,833	27.3	1,174
Local Government	20	941	14	865
Private Sector	417	3,890	57.9	713
Natural Resources & Mining	16	154	2.3	739
Construction	65	336	5	697
Manufacturing	14	250	3.7	1,051
Trade, Transportation & Utilities	114	1,054	15.7	852
Information	5	16	.2	650
Financial Activities	27	188	2.8	723
Professional & Business Services	38	146	2.2	675
Education & Health Services	60	1,172	17.5	700
Leisure and Hospitality	44	417	6.2	248
Other Services	30	155	2.3	623

LARGEST PRIVATE SECTOR EMPLOYERS

Employer	Product/Service	Employment
UMES	Higher Education	855
Sysco Eastern Shore	Food Products Distribution	450
Somerset Community Services	Services for Disabled	425
McCready Health	Medical Services	300
Aurora Senior Living of Manokin	Nursing Care	175
Sherwin Williams / Rubberset	Paint Brushes	150
Southern Connection Seafood	Seafood Distribution	130
Three Lower Counties Community Services	Medical Services	105

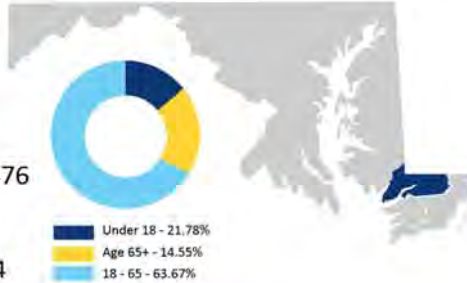


WICOMICO COUNTY

POPULATION

2010 - 98,733
 2018 Est. - 103,195
 2020 Proj. - 107,450
 2030 Proj. - 117,550

Median Age - 35.8
 Age 65+ - 15,015
 Age Under 18 - 22,476
 Minority - 32.30%



Male % - 46.66
 Female % - 52.34

HOUSING

2017 Median Sales Price
\$144,505

Vacant Units
11.23%*

Occupied Units
88.77%

ECONOMIC

Per Capita Personal Income 2017
\$40,896

Free Reduced Meals
41.2%

Percentage of Families Whose last 12 Month Income is Below Poverty Line
10.2%

Average Weekly Wages
\$839

County Property Tax
.78%

Food Insecurity Rate
14.1%

Sources
 U.S. Census Annual Estimates of Resident Population Maryland.gov
 U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates
 U.S. Bureau of Economic Analysis, 2017 Regional GDP and Personal Income
 Maryland State Department of Assessments and Taxation
 MD Department of Commerce

Industry	Establishments	Annual Avg. Empl.	Emp.%	Avg. Wkly. Wage
Government				
Federal Government	27	281	0.6	1227
State Government	13	2749	6.1	865
Local Government	48	4885	10.8	809
Private Sector	2497	37193	82.5	839
Natural Resources & Mining	27	299	0.7	667
Construction	274	2072	4.6	943
Manufacturing	97	2940	6.5	882
Trade, Transportation & Utilities	597	9670	21.4	746
Information	22	476	1.1	1168
Financial Activities	250	1841	4.1	970
Professional & Business Services	423	4357	9.7	1320
Education & Health Services	326	9028	20	971
Leisure and Hospitality	238	4737	10.5	308
Other Services	239	1772	3.9	515



LARGEST PRIVATE SECTOR EMPLOYERS

Employer	Product/Service	Employment
Peninsula Regional Medical Center	Medical Services	2900
Salisbury University	Higher Education	1865
Perdue Farms	HQ / Poultry Processing	1500
Wor-Wic Community College	Higher Education	435
Jubilant Cadista Pharmaceuticals	Generic Pharmaceuticals	340
Genesis HealthCare/Rehab & Nursing Center	Nursing Care	340
Delmarva Power	Energy Products and Services	300
K & L Microwave	Electronics Assembly	265



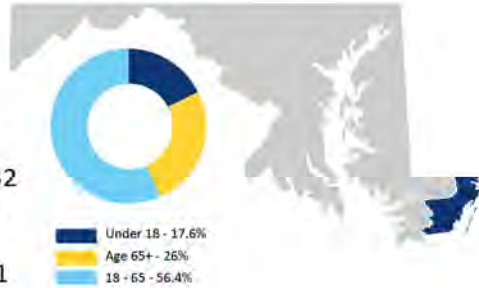
WORCESTER COUNTY

POPULATION

2010 - 51,454
 2018 Est. - 51,823
 2020 Proj. - 56,250
 2030 Proj. - 60,000

Median Age - 49.7
 Age 65+ - 13,509
 Age Under 18 - 9,132
 Minority - 17.31%

Male % - 48.49
 Female % - 51.11



HOUSING

2017 Median Sales Price
\$260,619

Vacant Units
62.18%*

Occupied Units
32.82%

ECONOMIC

Per Capita Personal Income 2017
\$58,191

Free Reduced Meals
77.32%

Percentage of Families Whose
 last 12 Month Income is
 Below Poverty Line
7.8%

County Property Tax
.62%

Average Weekly Wage
\$635

Food Insecurity Rate
11.7%

Sources

U.S. Census Annual Estimates of Resident Population Maryland.gov
 U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates
 U.S. Bureau of Economic Analysis, 2017 Regional GDP and Personal Income
 Maryland State Department of Assessments and Taxation
 MD Department of Commerce

*This reflects the significant number of properties that are used for seasonal, recreational, or occasional use.

Industry	Establishments	Annual Avg. Empl.	Emp.%	Avg. Wkly. Wage
Government				
Federal Government	14	178	0.7	1082
State Government	6	157	0.6	826
Local Government	45	3148	12.6	916
Private Sector	2136	21477	86	589
Natural Resources & Mining	24	98	0.4	800
Construction	232	1136	4.6	785
Manufacturing	45	697	2.8	797
Trade, Transportation & Utilities	468	4321	17.3	506
Information	19	176	0.7	922
Financial Activities	261	1101	4.4	796
Professional & Business Services	273	1502	6	775
Education & Health Services	149	2508	10	831
Leisure and Hospitality	508	9192	36.8	458
Other Services	154	743	3	574



LARGEST PRIVATE SECTOR EMPLOYERS

Employer	Product/Service	Employment
Harrison Group	Hotels and Restaurants	1170
Atlantic General Hospital	Medical Services	860
Bayshore Development	Entertainment, Recreation	520
OC Seacrets	Hotel and Restaurant	470
Dough Roller	Restaurant	360
Ocean Enterprise 589 / Casino Ocean Downs	Casino Gambling	350
Carousel Resort Hotel & Condominiums	Hotel and Condominiums	340
Clarion Resort Fontainebleau	Hotel and Restaurant	340



ECONOMIC RESILIENCE



For the purposes of this document, we define economic resilience as the ability to anticipate threats to our economy, reduce the impact of these threats by taking preemptive action, respond appropriately and efficiently when these threats materialize, and have a plan in place for recovery.

Generally speaking, these threats can be economic events such as plant closures, infrastructure disruptions, financial shocks; they can be natural events (weather-related), or they can be technological threats, such as hazardous material accidents, pandemic diseases, terrorism, etc., and can greatly cause an economic disruption or collapse within a community.

According to the U.S. Economic Development Administration, establishing economic resilience in a local or regional economy requires the ability to anticipate risk, evaluate how that risk can impact key economic assets, and build a responsive capacity.

During the past 25 years, the Lower Eastern Shore of Maryland has endured multiple economic disruptions. Some of these have been due to:

- National economic downturns with detrimental local and regional economic impacts;
- Key economic activity sector downturns in particular industries that constitute a critical component of the region's economic activity, such as construction and real-estate;
- Other external shocks such as hurricanes, flooding, snow and ice storms, avian influenza scares, fish kills, etc.

In almost all of these cases, the local economy was harmed but eventually recovered, sometimes with state and federal help.





Chesapeake Blue Crab

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ECONOMIC RESILIENCE cont'd

During these 25 years, the region's economy has become more diversified, thanks to deliberate efforts of our county economic development decision makers. In addition, our workforce development programs have become more industry specific, more employer driven, and more outcomes based. Our emergency management agencies have greatly enhanced their disaster preparedness plans and have conducted many exercises including desktop simulations. Area health care organizations and public and non-profit sector social service organizations have also collaborated to improve their preparedness and recovery plans. However, the opportunity do more to increase the region's economic resilience still exists. As a result, the Lower Eastern Shore of Maryland is committed to becoming resilient with respect to all predictable and unforeseen economic disruptions. To this end, we have established the following three economic resilience goals:

1. We will be developing a task force to continually scan the environment for leading indicators of economic disruptions. This will enable us to better anticipate potential economic disruptions before they occur. At the outset of this effort, we will administer an Economic Resilience Survey to our CEDS Committee members and our key stakeholders. This survey will be a locally adapted version of a similar survey developed by our sister region to our immediate north, the Mid-Shore Regional Council. The goal of the survey will be to determine a baseline of economic resilience and/or preparedness efforts already taking place in the region as well as the level of awareness of economic resilience.
2. The task force will also develop contingency plans for a variety of potential economic disruptions based on our physical, economic, and social vulnerabilities. These contingency plans will help us undertake mitigating actions to reduce the impact of different types of

economic disruptions, whether they are anticipated or unexpected. These contingency plans will combine preemptive actions with deliberate steps designed to help us respond to events as they happen, mobilize resources, and coordinate relief efforts.

3. Finally, the task force will help organize key organizations and stakeholders to prepare for various stages of emergency response, restoration, reconstruction, and community betterment to ensure rapid and complete recovery after an economic disruption takes place.



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ECONOMIC RESILIENCE cont'd

In all these activities we will emphasize the fact that, at the regional or community level, economic development practitioners are instrumental in building the capacity for economic resilience. Economic development professionals and organizations often become the focal point for post-incident coordination, information dissemination, responding to external inquiries, and the lead grant administrator for federally-funded recovery initiatives.

The task force activities will be focused around:

1. **Steady-state** initiatives, which are long-term efforts that seek to bolster our ability to withstand or avoid a shock. Some examples include:

- Engaging in comprehensive planning efforts that includes the integration and/or alignment of other planning efforts (e.g., hazard mitigation plans) and funding sources;
- Undertaking efforts to broaden the industrial base with diversification initiatives, such as targeting the development of emerging clusters or industries that (a) build on the region's unique assets and competitive strengths; and (b) provide stability during downturns that disproportionately impact any single cluster or industry;

- Adapting business retention and expansion programs (e.g., economic gardening or other enterprise supports) to assist firms with economic recovery post-disruption;
- Building a resilient workforce that can better shift between jobs or industries when their core employment is threatened through job-driven skills strategies and support organizations;
- Ensuring redundancy in telecommunications and broadband networks to protect commerce and public safety in the event of natural or manmade disasters;
- Promoting business continuity and preparedness (i.e., ensuring businesses understand their vulnerabilities—including supply chains—in the face of disruptions and are prepared to take actions to resume operations after an event); and
- Employing safe development practices in business districts and surrounding communities.

2. **Responsive** economic resilience initiatives which could include:

- Conducting pre-disaster recovery planning to define key stakeholders, roles, responsibilities, and key actions;

- Establishing a process for regular communication, monitoring, and updating of business community needs and issues (which can then be used after an incident);
- Establishing/using a capability to rapidly contact key local, regional, state, and federal officials to communicate business sector needs and coordinate impact assessment efforts; and
- Establishing/using coordination mechanisms and leadership succession plans for short, intermediate, and long-term recovery needs.

The goals outlined in the following pages were developed through a series of focus group meetings with stakeholders from all industries. The goals are numbered for ease of reference and do not indicate priority among the goals. The success of each of these goals will help promote the success of the other goals.

GOAL 1: HEALTHY ECONOMY

Grow a strong and healthy economy through helping resident businesses increase their competitiveness, supporting the growth of the entrepreneurial base, and attracting new industry sectors that are compatible with our socio-economic environment.



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Railroad tracks- © TetyanaOhare- stock.adobe.com

The Lower Eastern Shore of Maryland is an attractive region for both businesses and residents. The region must welcome new businesses and provide strong support for the expansion of existing businesses in order to strengthen the health of the local economy. A business-friendly environment creates a region that attracts and retains talented employees and provides quality jobs for local residents. Support for entrepreneurship continues to grow with organizations such as Hotdesks, the Ratcliffe Shore Hatchery Competition, and Salisbury University's

Downtown Center for Entrepreneurship opening in 2020. Given the prominence of family and closely-held businesses in the region, providing support and training in areas such as succession and contingency planning is important to the long-term economic viability of the local economy.

Healthcare innovation offers one area for entrepreneurial focus in the region. With strong and growing healthcare systems in the region and a growing aging population there are ample opportunities for the growth of healthcare innovation.

Agriculture and agribusiness has long been one of the mainstays of the local economy. New opportunities for diversification of crops should continue to be explored. Thoughtful consideration should be given to land use policies that impact the access to productive farmland while also protecting the region's vast and varied environmental assets.

Regional tourism ranges from the large summer resort town of Ocean City to a growing number of sports tourism opportunities, including the Salisbury Marathon and the

USSSA East tournaments. Regional events also include a long list of natural, cultural and historical tourism activities.

An underutilized but powerful mechanism for economic growth in the region is Public Private Partnerships or "P3." These partnerships spread the risk and the rewards among the public and private sector partners. The concept to completion timelines are faster, the financing obstacles are lower and, when designed appropriately, the overall costs can also be lower. Some examples of local P3 relationships include dorm construction at the University of Maryland Eastern Shore and Salisbury University, as well as the collector road near the Aydelotte Farms development in Salisbury, MD.



GOAL 1: HEALTHY ECONOMY

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Strategies and action plans supporting Goal 1:

Strategy 1: Promote and support local and diverse entrepreneurship initiatives in an effort to strengthen the local economy.

- ⇒ 1.1 Strengthen and expand support networks for entrepreneurs.
- ⇒ 1.2 Promote learning and collaboration opportunities.

Strategy 2: Assist local private sector entities with navigating the regulatory process for business creation, expansion, and development.

- ⇒ 2.1 Encourage increased transparency in regulatory processes.
- ⇒ 2.2 Provide easy access to regulatory information.

Strategy 3: Facilitate collaborative partnerships between public and private entities to support economic growth.

- ⇒ 3.1 Identify priority opportunities for P3's.
- ⇒ 3.2 Facilitate collaboration between partners and assist in leveraging resources.

Strategy 4: Encourage and support the entry and growth of new industries and sub-industries to diversify business opportunities.

- ⇒ 4.1 Identify target areas for growth in both new industries and ancillary businesses for existing industries.
- ⇒ 4.2 Collaborate with partners to improve urban-rural market connections throughout the region.

Strategy 5: Support economic clustering as a feeder for innovation, diversification, and job creation.

- ⇒ 5.1 Coordinate access to incentives, capital, workshops, learning and collaboration opportunities.

Strategy 6: Increase affordable and workforce housing options throughout the region.

- ⇒ 6.1 Facilitate coordinated planning efforts to encourage housing investments near job markets.
- ⇒ 6.2 Provide technical assistance to promote fair housing standards.
- ⇒ 6.3 Support and promote efforts to incentivize affordable and workforce housing.

GOAL 1: HEALTHY ECONOMY

Grow a strong and healthy economy through helping resident businesses increase their competitiveness, supporting the growth of the entrepreneurial base, and attracting new industry sectors that are compatible with our socio-economic environment.



Specific Projects Supporting Goal 1:

Somerset Crossing on Route 13 across from UMES Blvd. (Somerset) - a mixed use commercial development to include hotel/lodging, professional office space, retail and highway pad sites. Royal Farms currently planned as tenant. Specific plans include medical/office space 42,000 sq. ft., proposed hotel 42,000 sq. ft., retail up to 80,000 sq. ft., flex pad sites 104 acres, future development.

- Planning and zoning process with local government to be completed 2021. Moved back to 2022.
- Project to include new full turn intersection with traffic light tying UMES Blvd and the site together.
- Brittingham Lane to be upgraded and tied in as an additional ingress/egress.
- Architectural/engineering process to be completed by late 2021. Moved back to 2022.
- October—November 2021: Land cleared and site for NG junction allocated.
- NG junction completed December 2021.
- Lateral extension to UMES expected completion date Summer 2022.
- Site Plan for Royal Farms being executed.

McCready/Peninsula Regional Health System (PRHS) Merger (Regional— Somerset, Wicomico, Worcester) - transition toward regionalization of healthcare with increased quality of care and services due to greater resources.

- Agreement to merge signed in Summer 2019.
- Federal and State regulatory process completed March 2020.
- Transition completed 2020.
- Phase I McCready transitions to a free-standing medical facility (FMF) while new facility (McCready Health Pavilion) is constructed nearby—expected to be completed second half of 2022. Pushed back to early 2023.
- Phase II TidalHealth McCready Pavilion will operate out of the new facility, while the nursing home and assisted living facilities will remain on existing site.

Sage Policy Study (Economic Analysis for Somerset County) - funded by Hurricane Sandy related federal funds.

- Completed mid-2020.
- Condemnation in 2020 of two existing buildings in Crisfield damaged by Hurricane Sandy.
- Recommendations regarding critical infrastructure upgrades being considered. Recommendations being use to assist in demo efforts in uptown area of Crisfield.

Crisfield Airport Hanger (Somerset) - Construction of hangers to attract business.

- Funding received from MAA and FAA for upgrading of terminal.
- Tree removal by FAA to enhance safety per Crisfield Airport Plan to be completed mid-2021. Project still ongoing in October 2021.

Salisbury University Dave and Patsy Rommel Center for Entrepreneurship (Regional - Somerset, Wicomico, Worcester) - places for 12 resident entrepreneurs, shared co-working space, small offices/garages, makerspace, science oriented wet lab, retail display, meeting areas and individual seating throughout the facility for 100 entrepreneurs.

- 700 sq. ft. “pop-up space” prototype facility opened August 2019 will remain open until March 2021 as all services transfer to the Dave and Patsy Rommel Center for Entrepreneurship.
- 6,000 sq. ft. full facility scheduled to open August 2020. Grand Opening scheduled for 2021 as health protocols allow. Change to Community Open House scheduled for 2022 as health protocols allow.
- Student Entrepreneurship Competition (SU Students) held virtually April 2021. Next competition scheduled in-person on Salisbury University Campus in Perdue Hall May 2022.
- Shore Hatchery Bi-annual Business Competition held virtually in May and October, 2020 and April 2021. Fall 2021 Shore Hatchery held privately in-person October 2021. Next competition to be held in person at Center in May 2022.
- Application process for community applicants begin in 2022 as health protocols allow.

GOAL 1: HEALTHY ECONOMY

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Specific Projects Supporting Goal 1—cont.

Renewable Energy Ventures (Somerset) - Two facilities employing anaerobic digestion process to convert agricultural waste into biogas.

- Parcel in Princess Anne industrial park purchased 2020.
- Permit process for Princess Anne location to be completed in 2021 with construction to begin with official ground breaking in early 2022.
- Existing facility in Westover currently undergoing upgrades.

Ocean City Convention Center Access Channel (Regional - Worcester, Wicomico, Somerset) - Cost of \$675,000 - Dredge a navigable channel to the Convention Center Pier Area. Add floating docks and a water taxi terminal at the convention center boardwalk. Not Rated—enhancement of Convention Center Phase III rated top priority in 2018.

- FY24-FY25

Northern Worcester Athletic Complex (Regional - Somerset, Worcester, Wicomico) - To diversify and capture the growing sports tourism industry and a physical facility is needed. Increase tourism year-round; new employment and community involvement opportunities; additional educational opportunities; develop a park in conjunction with sports complex. Potential for a future indoor recreation facility. Acquire the entire property known as the Berlin Lion's Club currently operated and leased to the Berlin Little League. Develop the remaining land with two additional little league fields, in addition, continue to develop the rectangular fields located within the county owned property adjacent to the Berlin Little League. Berlin Little League is expected to grow and the efforts of the county to attract and develop quality playing fields has been tasked.

- Determine Site Location 2020
- Engineering/Design FY21
- Land Acquisition FY22
- Construction FY22—still pursuing site acquisition—push back to FY23.

GOAL 2: COMPETITIVE WORKFORCE

Ensure that workers and job seekers of all ages have awareness of and access to the education and training opportunities needed to succeed in both our existing and emerging industries.



J.M. Tawes Career and Technology Center in Westover, Somerset County—Rendering Courtesy of Becker Morgan Group, Inc.

The Lower Eastern Shore boasts a strong education continuum that includes workforce development and training. The region is home to three institutions of higher education including Wor-Wic Community College, Salisbury University, and the University of Maryland Eastern Shore. Proper training opportunities must be in place to prepare individuals for careers in a variety of existing and potential future careers. Education should be responsive to the needs of the local, national, and global markets while being forward thinking and open to the integration of technology across all fields. Affordability and accessibility are key to providing opportunities to individuals of all socio-economic classes.

The region has a very robust career and technology education backbone comprising the three school systems and Wor-Wic Community College. There are, however, opportunities for further improving these activities through well planned, coordinated, and managed internships, apprenticeships,

and on-the-job training programs and activities. Of the three technical high schools in the region, it is worth noting the scheduled October 2019 opening of the new \$43 million Somerset County J.M. Tawes Career and Technology Center in the community of Westover.

The Maryland EARN program and the Maryland DLLR Apprenticeship programs are examples of such programs that can be further utilized and serve as a model for local workforce programs. To bolster the success of economic and workforce development programs, case management and support services must be available and accessible. Similarly, employer driven Skill Acquisition/Skill Development programs and activities can be developed and the existing ones can be further enhanced with strategic public subsidies and incentives to further develop the local workforce.

To meet the needs of all age cohorts,

adequate opportunities for the aging population to remain engaged in the community through educational, workforce, and volunteer opportunities should remain a priority. The presence of a competitive workforce is critical to the region's ability to attract and sustain existing businesses and serves as a key piece to fulfilling Goal 1: Health Economy and Goal 4: Vibrant Communities.

Support for the public school systems in the region is somewhat mixed. Generally, available resources have declined in the past ten year period in Somerset and Wicomico counties. In Worcester, the support seems relatively stable. Given the evolving career and college readiness needs of the local populations, additional strategic investments are needed to address various skill gaps (Source: Eastern Shore of Maryland Educational Consortium Report 2018). Investing in public education remains the best and fastest way to improve the economy of a region. Such investments also yield some of the highest ROIs among public expenditures.

GOAL 2: COMPETITIVE WORKFORCE

Ensure that workers and job seekers of all ages have awareness of and access to the education and training opportunities needed to succeed in both our existing and emerging industries.



Strategies and Action Plans Supporting Goal 2:

Strategy 1: Facilitate collaboration between educational partners and industry partners to ensure students are acquiring the skills and knowledge needed to be competitive in the workforce.

⇒ **1.1** Coordinate a CEDS Workforce Development Task Force involving all partners to assess current needs and gaps.

Strategy 2: Strengthen and diversify education and workforce development programs throughout the region.

⇒ **2.1** Delegate these tasks to the CEDS Workforce Development Task Force.

Strategy 3: Implement a campaign to grow awareness of the variety of industries and workforce opportunities in the region.

⇒ **3.1** Delegate these tasks to the CEDS Workforce Development Task Force.

Strategy 4: Develop a clearinghouse to compile and share regional job and workforce development opportunities.

⇒ **4.1** Delegate these tasks to the CEDS Workforce Development Task Force.

Metrics: Annual Task Force Survey

GOAL 2: COMPETITIVE WORKFORCE

Ensure that workers and job seekers of all ages have awareness of and access to the education and training opportunities needed to succeed in both our existing and emerging industries.



Specific Projects Supporting Goal 2:

Worcester County Economic Development STATT-AP - Skilled Trades, Agriculture, Technology (STEM) and Tourism Apprenticeship Program (Regional - Wicomico, Worcester Somerset) - Program is partnership between County Economic Development, Worcester Technical High School, Worcester DoE and private businesses. Provide work-based learning experience for high school students and recent graduates of Worcester County to explore skilled trades, agriculture, tourism and hospitality related careers through paid internships, apprenticeships and permanent employment opportunities.

- Met with Worcester Technical High School February 2020
- Worcester Co. Econ. Dev. Applied to Tri-County Council for RMPiF May 2021.
- Program to be initiated Summer 2021.
- Initial pilot program executed with Stem in 2021. Meetings with Worcester Board of Education in October.
- Full executed and functioning program to be in place by Spring 2022.

Crisfield Airport Instructional Component (Somerset) - to add UMES instructional component to facility in order to assist in operations.

- Negotiations between UMES and local government commenced 2019.
- Private sector company has expressed interest in project.
- Project ongoing in October 2021.

Wicomico County Aviation Maintenance Technician (AMT) Training Program (Regional - Wicomico, Worcester, Somerset) - Development of an AMT program and/or enhanced partnership of existing and potential new AMT providers throughout the Lower Eastern Shore Region to strengthen skill sets of existing maintenance technicians and to enhance the pipeline of future aviation technicians. Project will provide technically trained individuals to assist in retention of existing commercial carrier, as well as private and general aviation tenants at the Salisbury-Ocean City Wicomico Regional Airport (SBY).

- Proposal form Wicomico Co. submitted to Lower Shore Workforce Alliance division to Tri-County Council for ARPA funding in December 2021.

Somerset County Technical High School (Somerset) - \$42 million LEED Gold Status project to provide Somerset County with educational and facilities infrastructure to participate in region-wide instructional program development. Will encourage and incentivize greater collaboration between Somerset Regional Advisory Committee and other county advisory committees. Provides significant community focal point for MD 413 between Westover and Crisfield, including community events.

- Opened for classes in September, 2019.
- Capital improvements completed Fall 2019.
- Capacity building ongoing.
- Developing partnerships with regional universities, Wallops Island Flight Center and employers to meet regional workforce needs.
- Rural Maryland Prosperity Investment Fund (RMPiF) monies awarded through Tri-County Council for expansion of Somerset County Career and Technology Enrichment Program in January 2022.

Applied Technology Building - Wor-Wic Community College (Regional - Worcester, Wicomico Somerset) - 50,000 square foot, \$36 million facility will strengthen alignment of programs and courses with local employer needs and will house programs in logistics, transportation, multiple industrial technologies air conditioning heating and refrigeration, welding, plumbing construction and alternative energy—as well as a makerspace and the information technology department. Additional improvements will be made to related roadways and parking lots. State funding approved in April 2019.

- County funding approved in June 2019.
- Design began July 2020, completion scheduled for July 2021.
- Construction to begin August 2021.
- Groundbreaking September 2021.
- Completed by Fall 2023.

GOAL 2: COMPETITIVE WORKFORCE

Ensure that workers and job seekers of all ages have awareness of and access to the education and training opportunities needed to succeed in both our existing and emerging industries.



Specific Projects Supporting Goal 2:

Seasonal Workforce Housing Ocean City (Regional - Worcester, Wicomico, Somerset) - Building and provide housing for seasonal workforce in Ocean City. Initial estimates call for \$20 million investment in residence halls at several locations housing up to several thousand J1 and other seasonal workers.

- September 2021 presentation to Mayor and City Council resulted in approval to explore specifics of the project with national-level J1 housing contractor on City-owned parcels in Ocean City and West Ocean City.
- Parcels identification ongoing in 2022.

GOAL 3: INFRASTRUCTURE

Ensure the stable and growing infrastructure needed for economic diversification and growth, while adhering to guidelines that coincide with the goals of the region to help protect our environment, quantity of open spaces, and quality of life.



The region’s transportation infrastructure includes a network of roads, rail, water, and air. Efforts to enhance and grow the current infrastructure of the region will make a healthy economy and thriving region possible.

Additions to the transportation network that connect the current activity nodes will further integrate the region and help to manage sprawl. More transit options will allow residents greater access to employment and leisure opportunities while also reducing the environmental impact that results from the transport of a growing population.

The existing railway system is aging and in need of a funding mechanism to ensure its viability into the future. The system has great potential that will be wasted if such a mechanism is not identified in the near future.

Waterway infrastructure includes the Port of Salisbury and the West Ocean City Harbor. The Port of Salisbury, Maryland’s second largest port, has benefited from recent revitalization efforts and plans for continued development are underway. Maintaining proper dredging of the commercial waterways is essential to the

long-term viability of commercial water transport and the related industries. In the case of West Ocean City, the coming installation and operation of two offshore wind farms will increase the use and importance of the harbor and the channels.

The region should continue to strive to utilize the full capacity of infrastructure assets like the Salisbury-Ocean City-Wicomico Airport Business Center. The new regional jet service has definitely helped the airport but it also resulted in the local maintenance facility being closed with the local FBO moving to Philadelphia. Additional funding for further runway extensions is needed for the facility to reach its full potential. Reliance on a single carrier is also a concern.

Water and sewer infrastructure is an area of critical need in the region. Efforts to upgrade and expand the water/sewer infrastructure must continue to move forward in order to support existing development as well as future commercial and residential growth. Failure to do so will limit business expansion and continue to strain the existing system.



GOAL 3: INFRASTRUCTURE cont'd.

Ensure the stable and growing infrastructure needed for economic diversification and growth, while adhering to guidelines that coincide with the goals of the region to help protect our environment, quantity of open spaces, and quality of life.



Broadband internet access is a key component of the region's ability to create, attract, and retain job-creating businesses and institutions. Access improves the productivity and competitiveness of local business and provides additional teleworking opportunities for residents. It also provides better access to local government agencies and educational resources. While

broadband access has grown over the past decade, efforts to continue expansion and provide last mile infrastructure is needed to reach currently unserved and underserved populations.

Ensuring appropriate soft infrastructure, including healthcare, education, and government facilities, are in place is necessary to properly fulfill the current needs and support the future growth of the local population and business base. Existing facilities should be continuously monitored in order to proactively plan for growing capacity needs. School facilities should be upgraded, where necessary, to ensure students are provided with the optimum environment for learning in an increasingly digital era.

Renewable energy investments such as solar farms and the two offshore wind farms planned to be installed off the coast of Ocean City are positive developments for the region. However, the region still has a major transmission line deficit, with a single major line coming down south from the north. Capacity concerns during very cold and very hot days and a general inability of industrial, commercial, and residential users to reduce daily usage are ongoing issues. It is hoped that the expanding natural gas infrastructure

will help alleviate some of these concerns. Additional resiliency in the regional transportation and energy infrastructure is an important consideration for the overall health of the local economy. This issue is discussed further in the resiliency section of this document.

In the transportation industry, roughly 22% of residents in Somerset County arrive to work by driving, carpooling, using public transportation, or by walking less than 10 minutes. Only roughly 17% and 16% of Wicomico County and Worcester County residents respectively arrive to work in less than 10 minutes. Yet, in all three counties, only roughly 6% of residents take longer than 60 minutes to get to work. These findings seem to indicate that a majority of Lower Eastern Shore residents work within the state.

Lastly, the human capital of the region is an asset that cannot be overlooked when examining the local infrastructure needs. A trained and trainable workforce is a necessary component of the region's ability to support and grow its economic base. Efforts to address the human capital component can be found in Goal 2 above.

GOAL 3: INFRASTRUCTURE

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Strategies and action plans supporting Goal 3:

Strategy 1: Reconvene and restructure a regional Waste Water Committee in order to provide a comprehensive analysis of the water/sewer issues.

- ⇒ 1.1 Coordinate planning efforts to identify infrastructure issues as well as recommendations and goals with measurable milestones for addressing critical issues.
 - * **Metric:** Milestone Matrix
- ⇒ 1.2 Provide technical assistance to identify strategies for implementation of recommendations
 - * **Metric:** CEDS Annual Survey

Strategy 2: Continue to expand broadband access throughout the region.

- ⇒ 2.1 Identify areas in need of last mile broadband
 - * **Metric:** Broadband Map

Strategy 3: Support the development of alternative fuel sources in the region with emphasis on underserved areas.

- ⇒ 3.1 Grow awareness of alternative fuel sources, benefits, costs, economic, and environmental implications
 - * **Metric:** CEDS Annual Survey
- ⇒ 3.2 Provide technical assistance to assist partners and local jurisdictions implement alternative fuel infrastructure
 - * **Metric:** CEDS Annual Survey
- ⇒ 3.3 Support the expansion of the natural gas infrastructure.

Strategy 4: Promote utilization of existing US Route 13/Rail Transportation Corridor for Infrastructure Projects.

GOAL 3: INFRASTRUCTURE

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Specific Projects Supporting Goal 3: Transportation

West Ocean City Commercial Harbor (Worcester) - Repair and replace commercial bulkhead and correct 900 lineal feet of failing bulkhead.

- Preliminary costs estimates provided by J. Stacey Hart Engineering 2019.
- Project considered critical.
- Project should be completed as soon as possible with bulkhead failure determined by natural weather patterns.
- Engineering/Design FY21
- Permit Applications submitted September 2021– Approval Expected March 2022.
- Construction Estimated to being 2022.

Full Stop Light Intersection of US 13 and UMES Blvd. (Somerset) - To provide better access to existing and future business (Somerset Crossing - Goal 1) and increase safety. State Highway approval currently pending.

- State Highway approved site review. Will now go to Town of Princess Anne in October 2021.

Salisbury Port Feasibility Study (Regional - Somerset, Wicomico, Worcester) - to explore feasibility of locating the commercial port to the southwest of the marina to allow for expansion and flow of traffic.

- EDA Grant awarded June 2019.
- Bid awarded to CPCS Transcom, Inc. in October 2020, study is underway.
- First meeting of Steering Committee met in January 2021.
- Three Working Papers developed over period of February through July 2021.
- Draft Final Report to be presented to City of Salisbury in September and October 2021 meetings.

Crisfield Airport Hanger (Somerset) - Construction of hangers to attract business.

- Funding received from MAA and FAA for upgrading of terminal.
- Tree removal by FAA to enhance safety per Crisfield Airport Plan to be completed by mid-2021.
- Project ongoing in October 2021.

Construction of Additional Aircraft Hangers at Salisbury-Ocean City-Wicomico Regional Airport (Regional - Wicomico, Worcester Somerset) - Project leverages proposed upgrades and extension of utilities for airport campus, including Airport Technology Park. Benefits include helping to meet current and future requirements of aviation companies, logistics and distribution firms and other ancillary commercial and general aviation needs, as well as responding to significant shortage of large hangers on the east coast in areas near universities and within short drive of large metropolitan areas.

- Funding being sought.

Development of Fire Suppression Infrastructure at Salisbury-Ocean City-Wicomico Regional Airport (Regional - Wicomico, Worcester, Somerset)

- Meetings to take place with engineering firm January 2022.
- Funding from county ARPA funds in place.

GOAL 3: INFRASTRUCTURE

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Specific Projects Supporting Goal 3: Transportation

Crisfield Regional Passenger Ferry Service (Regional - Wicomico, Worcester, Somerset) - Establish a ferry service to and from various ports along the Chesapeake Bay, both North, South, East, and West. Service would utilize existing ports/terminals and future sites. Facilities in Crisfield would make use of existing Crisfield City Dock, docking port and parking area, with proposed administration terminal and tourism/recreational amenities supporting visitors and local businesses. Total area of facility would occupy approximately 3-4 acres. Project would support small businesses, promote tourism/outdoor recreation and related travel, and facilitate increased access to coastal communities isolated or marginalized by a combination of geography and shifting economic trends.

- Sources of funds will include local, state and federal funds, including Rebuilding American Infrastructure with Sustainability and Equity (RAISE) discretionary program.
- Estimated completion of feasibility study July 2023.
- Estimated completion to public meetings July 2023.
- Estimated completion of engineering/design and acquisition of land July 2025.
- Estimated completion of construction and initiation of service July 2026.

GOAL 3: INFRASTRUCTURE

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Specific Projects Supporting Goal 3: Utilities

Regional Broadband Expansion (Regional - Somerset, Wicomico, Worcester) - Continued and heightened pace of broadband expansion throughout entire region, both with regard to middle mile networks and last mile ISP service. Funding sources include State, federal and local governments.

- Updated Broadband Access Feasibility Studies completed in Somerset, Wicomico, and Worcester counties in late 2021.
- Negotiated agreements with ISP's being executed with individual county governments 2021-2022.
- ISP buildouts continuing in 2022.
- Middle mile networks continuing to expand through MD Broadband Cooperative and others in 2022.

Ocean City Baltimore Ave Streetscape Improvements (Worcester) - Division Street to 15th Street. Cost of \$550,000 (plus utility undergoing \$15M estimate). Improvements to Baltimore Ave between North Division and 15th streets. Enhancements for consideration include undergrounding utilities, wider sidewalks, utility strips, and landscaping to take better advantage of the existing 75' right of way. Cost estimates included at this time are widening sidewalks on the east side only with no utility undergrounding and cost shared with SHA. Addition of utility undergrounding would add value to the Ocean City gateway arrival experience, increase pedestrian safety, improve even management, and enhance the property values in the corridor.

- Conceptual design completed with capital improvement funding of \$1.5 million dollar (local match) and 1st public meeting held in 2021.
- FY22-FY23 Engineering/Construction.

Natural Gas Pipeline Extension (Regional - Wicomico, Worcester, Somerset) - Extend from Fruitland to Pocomoke City along US Route 13 corridor - Maryland portion of DelMar Energy Pathway Project. Phase I of construction would run from Fruitland in Wicomico to the junction of Route 13 and MD-413 in Somerset. Anchor customers are University of MD Eastern Shore and Eastern Correctional Institution. Additional customers are Princess Anne Industrial Park, Mountaire Farms, and Clean Bay Renewables LLC in Princess Anne/Westover.

- State of Maryland issued RFP in 2019—award made in 2019.
- Local government and Chesapeake Utilities currently working through franchise agreement.
- Equipment purchase for Eastern Correctional Institution to transition from wood-buringin to natural gas approved Summer 2020.
- BPW permit process for wetlands for Wicomico portion approved 2020. BPW permit process for Somerset portion ongoing
- Construction commenced on Delaware portion of project Q1 2020.
- Construction commenced Wicomico County and Somerset County January 2021.
- Construction to be completed January 2022 with start up in Spring of 2022.

Extension of Natural Gas Line to SBY Airport and Airport Technology Park (Regional - Wicomico, Worcester, Somerset) - 31,000 feet from Perdue Stadium along Hobbs Road and the SBY Airport and the Airport Technology Park.

- RFP issued with quotes due in February 2021.
- Responses to RFP received.
- Wicomico County seeking grant funding in partnership with Chesapeake Utilities and the Maryland Energy Infrastructure Program—new round of potential grants announced Summer 2021.

GOAL 3: INFRASTRUCTURE

Ensure the stable and growing infrastructure needed for economic diversification and growth, while adhering to guidelines that coincide with the goals of the region to help protect our environment, quantity of open spaces, and quality of life.



Specific Projects Supporting Goal 3: Utilities

Skipjack 1 Offshore Wind Farm Project (Regional - Somerset, Wicomico, Worcester)

- Proposed project would see the construction by Orsted of a 120 MW capacity 26,332 acre offshore wind farm off the coast of Fenwick Island, Delaware, creating jobs and spurring the economy of the Region. The project would be located on federal land leased by Orsted and is in line with goals set by the Maryland Offshore Wind Energy Act of 2013 and the Maryland Renewable Portfolio Standard (RPS).

- Public Service Commission awarded project 2017.
- Federal permits currently pending.
- October 2021 Announcement of site acquisition on Harbor Road for \$20 million West Ocean City operations and maintenance (O&M) facility.
- Project to be operational by 2026.

MarWind Offshore Wind Farm Project (Regional - Somerset, Wicomico, Worcester)

- Proposed project would see construction by US Wind of 248 MW capacity, 79,707 acre offshore wind farm off the coast of Ocean City, Maryland, creating jobs and spurring economic activity in the Region. The project would be located on federal land leased by US Wind and is in line with goals set by the Maryland Offshore Wind Energy Act of 2013 and the Maryland Renewable Portfolio Standard (RPS).

- Federal permits currently pending.
- Project to be operational by 2026.

GOAL 3: INFRASTRUCTURE

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Specific Projects Supporting Goal 3: Water & Sewer

Extension of Pocomoke City Municipal Water Service to City - owned Parcel on US Route 13 (Worcester) - Objective is to make a property more marketable while also linking existing commercial properties experiencing failing septic systems.

- Local government considered applying for RMPPIF funds in 2019.
- Currently considering dividing project into two phases and stacking funding sources.
- Phase I would consist of engineering study
- January update: Project on hold due to funding.

Ocean City - Salisbury - Wicomico Regional Airport Water Municipal Main Extension (Regional - Wicomico, Worcester, Somerset) - provides needed water infrastructure to support portable water, fire suppression and future development on the airport campus by running approximately six miles of pressurized water main from the municipal water tower at Wor-Wic Community College to Fooks Rad.

- Grant of \$1.5 million secured from MD Department of Environment through State Board of Public Works in October 2019.
- Low Interest loan of approximately \$3 million secured from MD Department of Environment through the Water Quality Loan Fund late 2019.
- Design completed 2019 with Notice of Proceed January 2020. Estimated date of completion November 2021.

Ocean City - Salisbury - Wicomico Regional Airport Water (Regional - Wicomico, Worcester, Somerset) - Provide needed water infrastructure by extending pressurized water line from Fooks Road to Falcon Drive and Technology)Park and future cargo area.

- County ARPA funds in place

Ocean City - Salisbury - Wicomico Regional Airport (Regional - Wicomico, Worcester, Somerset) - Provide needed sewer infrastructure by extending line from existing location at cul-de-sac of Citation Drive to Falcon Drive and along future cargo area.

- In 2021, County weighing option of funding project with ARPA funds.

Smith Island Clean Water Project (Regional - Somerset, Wicomico, Worcester) - Construction of a new Biological Nutrient Removal/Enhanced Nutrient Removal (BNR/ENR) wastewater treatment plant in Ewell and an upgrade to the wastewater collection and conveyance system. Includes decommissioning the existing Tylerton Wastewater Treatment Plant, an overhaul of three pumping stations and the construction of a new main to convey wastewater from Tylerton to the new plant.

- Board of Public Works funding approved June 2019.
- Timber Deck completed Fall of 2020.
- WWTP ready for bid advertisement by the end of January 2021.
- Bidding of the subaqueous force main (SFM) is dependent upon the issuance of the Tidal Wetlands License.
- Estimated completion subaqueous force main February 2022, pump stations June 2022, Ewell WWTP August 2023, post-construction last quarter 2023.
- October 2021: Still on track.

GOAL 3: INFRASTRUCTURE

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Specific Projects Supporting Goal 3: Water & Sewer—cont.

Deal Island Road Water Main Loop Project (Somerset) - Construction of 850 feet of 10" watermain and appurtenances by directional boring, 470 feet of 8" watermain and appurtenances by open-cut method, water services, hydrant assemblies, and all site restoration.

- Bid awarded 2021.
- Equipment on site October 2021.
- December 2021: Substantial completion.
- Winter 2022: finish work to be completed.

City of Salisbury Paleo Well No. 3 (Wicomico) - to increase drinking water capacity at Paleo Water Plant (currently 75% of City's drinking water) from two wells to three.

- Construction contract awarded January 13, 2020.
- Currently under construction—estimated completion June 2021.
- Project completion date extended January 2022.

Pocomoke City Water Tanks #1 and #2 Mixers (Worcester) - to alleviate chronic municipal water quality issues. With the assistance of GMB, Pocomoke City's chosen engineering firm, the city has proposed to install a mixer inside both City water tanks. This mixer will aerate the water which will reduce the amount of TTHM (Total trihalomethanes) bring the levels to an acceptable, and compliant range. Project funded by Maryland Department of Environment (MDE).

- Begin design - March 2021.
- Design to Engineering and Capital Project Program - December 2021.
- Complete design and bid for construction services - April 2022.
- Bidding opening (RFP) - May 2022.
- Start construction - July 2022.

Pocomoke City Pump Station Replacement Project (Worcester) - rehabilitating obsolete pump stations in Pocomoke City. Upgrades will consist of the rehabilitation of four of the existing seventeen pumping stations within the city sewer service into wet wells and installing submersible pumps, rails, valves, and controls. The existing four pumping stations to be replaced consist of dual pneumatic injectors located in underground vaults for the purpose of lifting sewer to that adjacent gravity system downstream. The proposed project will benefit the residents of Pocomoke City by ensuring continuous sanitary sewer system function. In addition, the upgrades would help to facilitate reasonable and planned economic growth in the area, while also helping to protect the Chesapeake Bay Watershed.

- Bids opened December 2021.

Town of Snow Hill I & II (infiltration & inflow) Project (Worcester) - replace or re-line over 1,700 linear feet of underground sewer lines and associated manholes at the surface and running through wetlands adjacent to the Pocomoke River. Project will eliminate serious threat to the environment from sewage leakage and contribute to an increase in economic development capability by restoring lost treatment capacity in the Town's wastewater treatment facility. The project is funded with a Community Development Block Grant and local funds.

- Engineering contract to be awarded late winter of 2022.
- Construction contract will be awarded spring of 2022.
- Construction to be completed October 2022.

Wicomico County Water and Sewer Master Plan (Wicomico)

- Master plan received by engineering firm September 2021.
- Milestones and Priorities to be established in FY23.

GOAL 4: VIBRANT COMMUNITIES

Implement flexible and resilient development practices that ensure the protection of the natural environment while fostering diverse cultural and recreational opportunities to ensure residents and visitors alike enjoy vibrant communities throughout the region.



The Lower Eastern Shore boasts abundant natural beauty, strong historical assets and a vibrant cultural heritage. The unique geography encompasses vast open lands and a network of rivers nestled between the beautiful Chesapeake Bay and the Atlantic Ocean. Historical downtown areas and attractions provide a strong connection to the past that built this region.

Balancing the needs for growth to accommodate a strong and healthy economy with the conservation of natural resources is a key priority for the region. Preserving the coastline and protecting the health of the waterways on which generations have built their living is key to not only ensuring the environmental health and sustainability of the region but also for providing heritage and

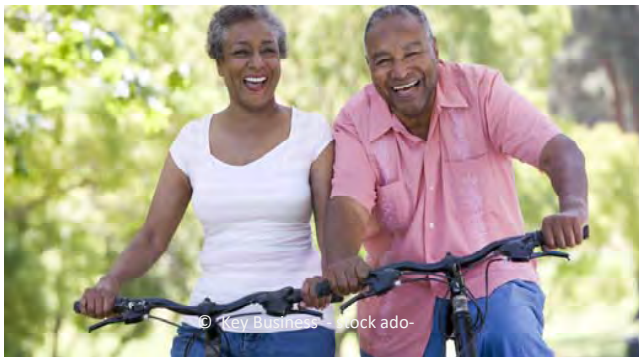
eco-tourism opportunities that allow residents and visitors to enjoy these natural assets. Similarly, development growth must be balanced with the need to safeguard productive farmland in support of one of the largest industries in the region.

“Quality-of-life” is a phrase often used to describe what residents love about the area although the exact definition is difficult to pinpoint. The close access to many metropolitan areas including Baltimore, Washington D.C., Annapolis, New York City, and Richmond without the experience of the day-to-day congestion is one of the competitive advantages the region has to offer to both businesses and individuals. Access to many music, art, and cultural amenities allows residents to enjoy experiences that speak to their interests.

Initiatives to improve air and water quality and innovate in ways that enhance sustainability while reducing environmental impacts will benefit not only the economy but the natural assets that contribute to the quality-of-life and attract future residents and visitors. It is incumbent upon all

stakeholders, including major industries, to augment bay restoration efforts by reducing their runoff. By the same token planners must think strategically regarding the impact of sprawl on the region’s waterways.

The region has long been an active retirement destination for individuals over the age of 60 and this population continues to grow. Providing the amenities and infrastructure necessary to allow residents to age in place is an important consideration in providing this segment of the population with continued access to the vibrant communities that brought or kept them here in the first place.



GOAL 4: VIBRANT COMMUNITIES

Implement flexible and resilient development practices that ensure the protection of the natural environment while fostering diverse cultural and recreational opportunities to ensure residents and visitors alike enjoy vibrant communities throughout the region.



Strategies and action plans supporting Goal 4:

Strategy 1: Support planning efforts that balance the need for planned growth and the conservation of important natural resources in the region.

- ⇒ 1.1 Collaborate with partners and local jurisdiction to identify priority development areas and priority conservation areas.
 - * **Metric:** Priority Area Map

Strategy 2: Facilitate coordination of thoughtful and deliberate community planning and development efforts that cultivate a true sense of “community” for residents.

- ⇒ 2.1 Facilitate collaboration between all planning partners.
 - * **Metric:** CEDS Annual Survey
- ⇒ 2.2 Encourage collaboration between transportation and land use planning
 - * **Metric:** CEDS Annual Survey
- ⇒ 2.3 Provide technical assistance to areas desiring to revitalize.
 - * **Metric:** CEDS Annual Survey

Strategy 3: Serve as a clearinghouse of community and cultural events in the region and encourage collaboration in programs and marketing.

- ⇒ 3.1 Collaborate with partners throughout the region to gather information on local offerings.
 - * **Metric:** CEDS Annual Survey
- ⇒ 3.2 Develop a tool to promote community and cultural events throughout the region.
 - * **Metric:** The tool itself
- ⇒ 3.3 Grow awareness of local events and of the new tool.
 - * **Metric:** Analytics for the tool.

Strategy 4: Implement a regional branding initiative to provide the Lower Eastern shore with a clear identity in regional marketing efforts

- ⇒ 4.1 Facilitate collaboration among partners throughout the region to determine benefits of and uses for regional branding efforts
 - * **Metric:** CEDS Annual Survey
- ⇒ 4.2 Develop and implement a regional branding strategy

Strategy 5: Facilitate coordination of requests for flexibility in zoning

- ⇒ 5.1 facilitate collaboration with partners to determine the need for flexibility in zoning and appropriate flexible zoning techniques.
 - * **Metric:** CEDS Annual Survey
- ⇒ 5.2 Encourage the development of processes for the consideration of flexible zoning requests.
 - * **Metric:** CEDS Annual Survey
- ⇒ 5.3 Provide technical assistance to partners

GOAL 4: VIBRANT COMMUNITIES

Implement flexible and resilient development practices that ensure the protection of the natural environment while fostering diverse cultural and recreational opportunities to ensure residents and visitors alike enjoy vibrant communities throughout the region.



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Specific Projects Supporting Goal 4:

Westover to Crisfield Trail Mix Rail to Trail Project (Regional - Somerset, Worcester, Wicomico) - funded with a combination of nearly \$5 million in two state/federal grants and runs along MD-413 on abandoned railway bed. Total distance is 12 miles and is paved. Project will increase public health/recreation/safety concerns, promote beautification, improve storm water management, provide blacktop access of adjacent properties of MD-413.

- Phase I Crisfield—Marion Station 5 mile stretch RFP March 2019, construction began Spring 2109 and is currently in use with final punch list items complete in Spring 2021.
- Phase II Westover - Marion Station 7 mile stretch to be funded with two state and federal grants - expected completion in late 2022.

Carvel Hall Brownfield Site - former Briddell Knives Manufacturing Site (Regional—Somerset, Worcester, Wicomico) - City of Crisfield (owner) plans to submit request for funding to DHCD to build a passive fitness park adjacent to the property in 2022-2021. A portion of the Somerset Trail Mix to Trail passes in front of the property. Trail and park projects calculated to render the property more attractive to potential purchaser or tenant.

- Funder requires use of adjacent vacant Carvel Hall building by owner or tenant prior to funding for construction of park.
- City has received three applicants for use of vacant Carvel Hall facility in 2020 which will be reviewed in early 2021.
- City awarded to Element MD with settlement date by end of 2021.
- January 2022: The blueprint has been created. Within the next six months there is going to some progress made.

North Prong Park (Wicomico) - design and redevelopment of existing Salisbury commercial port/industrial area in North Prong of Wicomico River—create north - west gateway linking Salisbury's Downtown and west side neighborhoods. Work includes design, land acquisition and construction for history interpretation, environmental education and resiliency, trails, farmers market, community garden, recreation, retail, etc.

- Concept presented in Envision Salisbury 20 year plan in 2016 - refined in student competition 2019.
- July 2020 - City purchased SALKAP Property, next to the Perdue Grain Facility on Lake Street.
- Fall 2020—Applied for grant to demo SALKAP Property.
- 2021—demo grant re-applied for.
- January 2021 - Applied for grant for development of park on SALKAP and other properties along the North Prong.
- Fall 2021 - Began design development of a park on SALKAP property. Design development pushed back to July 2022 due to lack of funds.
- 2022 - Demo above-ground structure on SALKAP property and restore property for recreational uses. Demo date pushed back to 2023.
- 2022 - Move City Utility Department on Isabella St to the City Field Operations campus at 500 Mack Ave. Demo City Utility Building on Isabella. Demo pushed back to 2023.
- 2023 - Demo old Fire Training Center on Isabell Ave. Demo pushed back to 2024

GOAL 4: VIBRANT COMMUNITIES

Implement flexible and resilient development practices that ensure the protection of the natural environment while fostering diverse cultural and recreational opportunities to ensure residents and visitors alike enjoy vibrant communities throughout the region.



Specific Projects Supporting Goal 4:

Pirates Wharf Park Development (Regional - Wicomico, Worcester, Somerset) - Wicomico County to develop property known as “Pirate’s Wharf”, located on Whitehaven Rd in Quantico, into a regional park. Park will feature water access to Wicomico River via single lane boat ramp and soft launch area for small boats, kayaks and canoes. Park will include walking trails, pavilion, comfort station, observation desk, a fishing pier and opportunities for recreational leisure and environmental education programming. One walking trail will be a history trail featuring interpretive signage and displays.

- Master Report published September 2019.
- Total project budgeted at \$2 million in local, state and federal funds. Budget raised to \$2.5 million FY2021.
- Portions of project to bid out in Spring 2021 with portion of park opening to public later in 2021. Date set back to 2022.

Wicomico Civic Center Exterior Project (Regional - Wicomico, Worcester, Somerset) - Wicomico County will an exterior renovation project of the facility which is designed to increase public safety and to enhance aesthetics and the overall attractiveness of the venue.

- Pending possible EDA Tourism Infrastructure grant, project could include expansion of box office, main lobby and additional entrance/food court in NW corner of venue.
- Phase I of project to bid out Spring/Summer 2021. Date set back to Spring/Summer 2022.
- Construction to begin Fall 2021. Date set back to end of 2022.
- Project scope expanded - total project cost expanded to \$6.6 million October 2021.
- Application submitted to EDA for \$5.5 million Travel, Tourism and Outdoor Recreation Grant December 2021.

Connelly Mill Park Development (Regional - Wicomico, Worcester, Somerset) - Wicomico County to develop “Connelly Mill Property” into regional park. The 234 acre property sits adjacent to the county’s existing main hub for recreation activities and tournaments—the Henry Parker Athletic Complex, as well as the City of Salisbury’s Naylor Mill Forest. Desirable natural features of the property include woods and elevations unusual for the area. Plans include providing new recreation amenities and connecting train systems to existing Naylor Mill trail system/Parker Athletic Complex, thus leveraging and enhancing these existing regional attractions.

- Variety of grant funding will be pursued.
- Master planning process/public input in FY24.
- Development to begin FY25 or later.

Ocean City Downtown Recreation Complex (Worcester) - Cost of \$2,500,000 - Redevelopment of 3rd Street Downtown Recreation Complex, the Town’s multi-use park in the downtown area. Master planning efforts have identified community needs and interests for the redevelopment of exercise stations, trails, open space, new playground, tennis courts, pickleball courts, skate park expansion.

- FY22 master plan is completed.
- FY22-25 Engineering/Design/Construction

Ocean City Life Saving Museum Renovations (Worcester) - Cost of \$580,000 based on preliminary design - renovations and a small addition to the Ocean City Life Saving Museum located at the South end of the boardwalk. The projects will add an elevator and emergency exit stairs to bring the building into compliance with ADA and life safety codes and update an important tourism destination on the Boardwalk.

- Real property donated by local business 2021.
- Completion in FY23 or later.

GOAL 4: VIBRANT COMMUNITIES

Implement flexible and resilient development practices that ensure the protection of the natural environment while fostering diverse cultural and recreational opportunities to ensure residents and visitors alike enjoy vibrant communities throughout the region.



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Specific Projects Supporting Goal 4:

Ocean City sunset Park Pier (Worcester) - Cost of \$270,000 - Sunset Park's construction was completed in 2006 on an existing 75' right-of-way located between Philadelphia Ave and the bay in Downtown Ocean City. The pedestrian oriented park includes scenic walkways, restroom facilities, stage area, and a boardwalk with bay overlook. The Phase 2 project includes construction of a pier for tall ships and other vessels along with a water taxi terminal.

- FY23 or later

Town of Snow Hill Pedestrian Friendly Project (Worcester) - A three-point initiative, in accordance with the 2010 Comprehensive and the 2025 Strategic Revitalization Plans, to increase walk and bike ability connecting key places of interest throughout Snow Hill and, more broadly, to similar regional projects. The fruition of these projects will reaffirm Snow Hill as an important way station for outdoor enthusiasts, especially bicyclists, as it leverages its premier location along the Pocomoke River and MD RT12, a MDOT State Highway Bike spine. Projects include:

1) **Walking and Biking Trail** funded by the MDOT SHA Maryland Kim Lamphier Bikeways Program Grant

- Snow Hill Bikeways Feasibility Study is currently underway by Toole Design, Inc. Scheduled to be completed by May 31, 2022.

2) **Riverwalk** funded by the Maryland Department of Housing & Community Development (DHCD) Operating Assistance Grant - Technical Assistance Grant and Strategic Demolition Fund Grant

- Blueprints to be completed February 2022.
- Construction to be completed May 2022.

3) **Downtown Traffic Flow Study**

- Completed study to be presented to Mayor and Council February 2022.



Appendix

(2021 - 2022) Crisfield Arts and Entertainment District (Somerset) - provides incentives for businesses opening within the district, which include property tax incentives, artist income tax subtraction modification and amusement & admissions tax exemption.

- Historic Corbin Library Building Studio/Gallery restoration completed Fall 2020.

(2021 - 2022) City of Salisbury Revitalization of Main Street (Wicomico) - To upgrade/replace water, sewer, and storm drains, increase pedestrian safety by adding street lights/new sidewalks, adding bio-retention areas to improve storm water runoff quality.

- First three blocks between Route 13 and Division Street completed late 2019.
- Division Street from Camden Street to Church Street construction completed June 2020.

(2021– 2022) Worcester County Economic Development STEM Program - Increase partnerships and expand student participation by extending program to include career-ready instruction/activities.

- Partnership with University of Maryland Eastern Shore’s Engineering and Aviation Building 2019.
- Meeting with Worcester Technical High School scheduled February 2020.
- Moved in January 2021.

(2022 - 2023) Worcester County Co-working Space - Shared co-working space involving Worcester County Economic Development, Small Business Development Center, and private businesses. Provide resources for entrepreneurs and satellite employees, access to high speed internet, proximity to other government agencies/departments and central location in the county. Long term goal is incubator.

- Currently researching location in Snow Hill and looking for funding opportunities. No timeline.

(2022-2023) Ocean City Sports Complex (Worcester) - Indoor/Outdoor sports complex designed to host large amateur tournaments. A feasibility study conducted by the Maryland Stadium Authority concluded that a facility is economically viable. Integrate sports marketing program with Worcester County to promote destination tourism combined with family friendly sports venues. Utilize existing tourism economic resources (hotels, restaurants, recreation) in Ocean City to maximize investment in sports facilities.

- FY21 feasibility study completed.
- FY22 land acquisition/partnership/design
- FY23 Construction—will be rolled into Norther Worcester Athletic Complex as part of concerted County/City project.

(2022-2023) Worcester County Broadband Access Study (Worcester) - Increase access and reliability of internet service to unserved and underserved school age children, residents, and businesses in Worcester County.

- Feasibility Study complete by CTC Technology & Energy 2019
- Broadband service testing contract with CTC Technology & Energy 202
- Updated January 2021.
- October 2021—County currently coordinating with ISP’s for expansion/buildout. Fiber in process of being installed.

(2022-2023) Somerset County Broadband Access Study (Somerset) - Somerset County Broadband Study funded by MD DHCD Hurricane Sandy monies. Purpose is to assess the needs and access.

- Study completed in Summer of 2020 and submitted to County Commissioners December 2020.
- Recommendations to be evaluated 2021.
- October 2021 - County currently coordinating with ISP’s for expansion/buildout.



Appendix

(2022-2023) City of Salisbury Gordy Road Water Main Extension Project (Wicomico) - to create loop in City's water system and provide redundancy in distribution system. Represents first connection of water main from north to east side of city.

- Construction commenced September 2020.
- Currently under construction - estimated completion May 2021.
- Project completed May 2021.

(2022-2023) City of Salisbury Fitzwater Street Sewer Pumping Station and Pumping Station Equipment Relocation (Wicomico) - to move existing pumping station road bed to adjacent parcel, relocate pump station components (controls/generator) from Marina property, thereby protecting pumping station from road traffic and allowing Marina development to move forward. Project to include replacing or rehabilitating sewer mains and manholes as necessary.

- Pumping station groundbreaking commenced December 2019.
- Currently under construction - estimated completion March 2021.
- Project completed March 2021.

(2022-2023) HPAC Inclusive Playground Project (Regional - Wicomico, Worcester, Somerset) - Henry S. Parker Sports Complex is currently a regional draw for sports tournaments and events. The project will enhance the regional nature of the complex by allowing children on the Lower shore of all levels of ability the opportunity to play together.

- Funding secured with estimated time of completion April 2021.
- Project completed and facility opened April 2021.

(2022-2023) Extension of ISP Broadband Service (Somerset) - From existing Maryland Broadband Cooperative trunkline network on MD Route 413 (Crisfield Highway) to communities of Westover, Fairmount, Upper Fairmount, and Manokin. ISP in partnership with County received grant funding in 2020.

- Construction commenced in 2020 and to continue in 2021.
- October 2021 - county currently coordinating with five ISP's in expansion effort.

(2022-2023) Extension of Broadband Trunkline (Wicomico) - Extension of MD Broadband Cooperative existing trunkline from US Route 50 to Quantico and Hebron and extending in stages through Tyaskin, Bivalve, Nanticoke and Waterview, resulting in high capacity fiber optic lateral line spanning twenty-three miles (121,968 ft.).

- Funds provided by MD DHCD through MD Office of Statewide Broadband.
- Notice to Proceed for Quantico portion issued late October with completion expected February 2021. Completed
- Notice to Proceed for Hebron portion issued late October. Awaiting County permits and pole attachment approval from Choptank Electric. Underground work commencing. Project completion expected June 2021. Completed.
- Project to be further extended to communities of Tyaskin and Bivalve along MD Route 349 through 67,421 feet of fiber - completion delayed Spring 2022.
- Project to be further extended to Nanticoke and Waterview along MD Route 349 through 25,600 feet of fiber-completion late Spring 2022.

(2022-2023) Extension of ISP Broadband Service to SBY Airport Technology Park (Regional—Wicomico, Worcester, Somerset) - from MD Broadband Coop POP on Hobbs Road to Mount Hermon Road, Airport Terminal Road to Citation Drive.

- Funds to be budgeted by County in FY22 with completion expected 4-6 months later in late calendar year 2021-2022.
- Contract awarded August 2021.
- Service for airport, technology park and its businesses switched to fiber - project completed late 2021.
- Consider moving project to appendix.

(2022-2023) Burgess Rural Living Center (Regional - Worcester, Wicomico, Somerset) - Located in an existing rest stop/tourist center on US Route 13 in Princess Anne. Extensive self-guided displays will highlight rural living in Somerset County from the 1880's to 1930's.

- Project is populated with artifacts from the collection of Mr. Lawrence Burgess.
- Funding secured through Transportation Alternative Program (TAP) Federal 80% and Maryland Bikeways Program (State) 20%. (For Bike trail).
- Completion in November 2021.
- Suggest moving to appendix.