

REGION 9 2023 – 2027 CEDS SWOT WORKSHOPS SUMMARY

On September 19 and 20, 2022, the Eastern Panhandle Regional Planning and Development Council (Region 9) hosted and facilitated four in-person workshops with stakeholders to conduct a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis for the five-year (2023-2027) update of Region 9's Comprehensive Economic Development Strategy (CEDS). The CEDS encompasses Berkeley, Jefferson, and Morgan Counties and their incorporated municipalities. The meetings were centrally held in Martinsburg, WV at the Berkeley County Sherriff's Office Training Room facility located at 510 S. Raleigh Street, Martinsburg, WV 25401.

A total of 48 people participated in the SWOT workshops and they included representatives from the following sectors. Appendix A identifies the attendees and along with the attendance sheets.

1. Economic Development, Commerce and Workforce Development
2. Tourism and Small Business
3. Civic and Non-Governmental Organizations
4. Local Government, Planning Commissions, Boards and Committees.

Attendees for each workshop were given a copy of the discussion itinerary along with the SWOT worksheet respectively presented in Appendices B and C. In addition, the PowerPoint slides included in Appendix D was used to facilitate the workshop discussion.

The SWOT inputs received from the workshop participants are presented in Table 1. Based on these inputs, the emerging key themes are summarized as follows. These themes will support the development of the CEDS goals and supporting objectives and actions.

Emerging Key Themes

Strengths

- The region's location to major metropolitan areas and its proximity to the interstate highway network has facilitated strong residential, commercial, industrial development growth; particularly in Berkeley and Jefferson Counties.
- The region's relatively low cost of living coupled with excellent quality of life amenities including public safety, primary health care services, outdoor recreation, etc. are further contributing to the region's population growth and diversity.
- The region's vocational and technical training institutions continue to support a strong workforce development environment.

- The region’s federal, state, and local elected officials continue work collaboratively to achieve successful outcomes that benefit the region’s growth and development.
- The Potomac River is a vital resource for the region’s continued growth.
- The region’s populations maintain a strong sense of “hometown” pride in their respective communities while being receptive to increased diversity and perspectives from new residents that promote change for positive outcomes.

Weaknesses

- The region’s secondary roadway network lacks the capacity and safety improvements necessary to handle the region’s increased vehicular travel demands.
- The region’s K-12 educational systems are underperforming and they lack the physical capacity to handle additional student population growth.
- The Eastern Panhandle’s labor wage rates remain uncompetitive with the labor shed markets of adjoining states (PA, MD, and VA). This contributes to a loss in educated workers seeking higher wages to maintain their increasing cost of living expenses in the Eastern Panhandle.
- The Eastern Panhandle lacks a unified, long-term growth management plan that considers the impacts of growth and collective needs of its population, environment, and infrastructure (transportation, sewer, water, gas, electric, broadband, parks and recreation, etc.).
- The Eastern Panhandle lacks specialized healthcare services.

Opportunities

- The Infrastructure Investment and Jobs Act (IIJA) (Bipartisan Infrastructure Law) will provide increased investment opportunities for the region’s critical infrastructure, including strategic growth of the Eastern West Virginia Regional Airport (MRB).
- Continued investments in recreational, cultural, and historical assets and amenities will continue to strengthen the region’s quality of life attributes.
- The region’s economic growth may provide an opportunity to expand two- and four-year educational degrees in science, technology, engineering, architecture, and math (STEAM).
- Strong public-private partnerships provide opportunities to continue the region’s strong recovery from the COVID-19 pandemic (e.g., <https://westvirginia.gov/what-is-resilient-west-virginia/>)

Threats

- The ongoing proliferation in nation’s opioid epidemic continues to impact West Virginia and the Eastern Panhandle region. The region’s lack of treatment facilities and other specialized care services is exacerbating the impacts on families and employers alike.
- Growth has induced greater market demands for housing and services and in turn is creating inequalities among segments of the population leading to an increase need for social and human services.
- Continued economic growth pressures are increasing the region’s vulnerability to hazards and capacities to deliver effective mitigation solutions.

- Centralized state government control and lack of modernization in state policy is hampering the Eastern Panhandle’s ability to reach its full potential and be competitive with regional markets in neighboring states.
- The future of the region’s public transportation services (EPTA bus and MARC rail) is dependent upon the availability of federal and state funding resources to subsidize their service delivery costs.

Table 1 – Region 9 CEDS SWOT Inputs

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • 47% population as retired individuals - Retirement state and opportunities for retired people. Quality of life for retired individuals. Access! • Ability to manage stormwater, hazard mitigation planning • access to DC amenities - MARC train • Access to freight • Access to health care - WVU, Valley Health • Adaptability to overcome hardships and economic issues • Affordability - housing and increasing supply • Airport - opportunity to expand • Airport, leveraging the largest airport in WV • Ascend WV - Shepherdstown, remote workers • Blue Ridge CTC - asset to our region • Bond Market - WV's financial health and rainy day fund is very strong. Funding to help grow • Broadband deployment - available fiber • Centralized location in the region - Accessibility • Chamber of Commerce - county and state offices are communicating more efficiently than ever before. Working beyond county boundaries and moving in the same direction • Collaboration between private entities and government agencies (EDA and EDC) • Collaboration with legislative leaders and local leaders. Willingness to work together • Communication and creative to support community needs • Communication with regional stakeholders, willingness to work together • Community colleges, opportunities for advanced education. BRCTC, Shepherd, Rumsey, Valley College, Online programs, etc. WV Invest • Coordinating partnerships between MC, BC, JC • Cost of electricity (Cheap) - fully regulated in the state of WV. Very cheap in comparison to surrounding states. Residential and commercial. Choices of energy production 	<ul style="list-style-type: none"> • "Brain drain" - tough keeping talent in WV. Engineering, consulting, etc. • Affordable housing - both rent and mortgages. Housing prices! • Affordable housing - market rate-subsidy, metro influx pricing is pricing out current residents • Allocation Formula needs to be addressed for state funding - Transportation - System Preservation Funding • Amenities do not exist here compared to where transplants come from • Availability of affordable housing • Broadband in rural areas - residents moving here and do not have the amenities • Businesses close early or open late. Hours are only during regular business hours. • Businesses closing early - lack of night life • cannot retain young people • Capital budgeting - lack of budgeting for future planning, "right sizing" infrastructure • Cell phone service • Cellular and broadband coverage • Central form of government - Charleston, WV controlling and regulating the EP - One size does not fit all • Childcare - lack of supply • Collaboration within the community - very little public-private partnerships. • Competitive wages - MD and surrounding states have higher wages • County education - comparison to other states • Culture - Struggle with the way things used to be vs progressive. Diversity leading to issues • dangerous roadways • Developer needs for utilities to install prospective infrastructure (PSC limitations). Increasing public/private partnerships • Developer needs for utilities to install prospective infrastructure (PSC limitations). Increasing public/private partnerships

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| <ul style="list-style-type: none"> • Cost of living - helps attract from other manufacturing locations. (P&G) Employees may be able to afford more here • Diversity of community - multiple historic downtowns, rural areas with suburban areas nearby. Mixed living areas. • Diversity of industries and opportunities where people can find work • Diversity of religion and spiritual assets, outreach from churches • Diversity of rural, small cities, larger cities for housing. • Diversity of the region - all three counties being diverse • Economic Diversity - risk diversity, small business along with major employers • Economy and Tax base diversity. Commercial and Industrial tax base is strong, not completely relying on residential taxes • Educational facilities in the Eastern Panhandle. Used in the recruitment. Post HS education • EP offers the ability to learn a trade rather than 4 year degree • EPTA New facility and service expansion opportunity • Expansion of US Silica and mining • Federal institutions in the EP - IRS, etc. Makes a more resilient community • Freedoms and civil rights • good leadership in chambers of commerce and EDAs • Government willingness to work with community, open for business • Grants and Incentives for business attraction. Main Streets are very active • Growing human capital and diverse labor force • Growing technology in transit - EPTA • Health care - WVU and Valley Health in all 3 counties • Heavy IT and Government/Federal contracts and agencies coming out of DC • Historic culture between Harpers Ferry, Shepherdstown, Martinsburg, Berkeley Springs, etc. • Hospitality - • I81 Corridor and future growth opportunities for freight growth. I81 widening, US522 grant, and US340 projects. Adding capacity for future growth. • I81 Corridor coalition | <ul style="list-style-type: none"> • difficult to become a licensed teacher in WV • Difficulty to do things differently - Thinking outside of the box in WV • Disconnect between EP and Charleston • Do not have a center for manufacturing - Robert C. Byrd example - Both BRCTC and Rumsey need to expand • Education - Accountability and consequences. Admin of schools, curriculum, uniformity and oversight • Education - Inability to solve the problem locally - Teacher Pay and High Teacher Turnover • Education - performance levels are way down. Morgan County levels are very low • Education - performance levels are way down. Morgan County levels are very low • Employment pool - Inability to pass background and drug tests • EP - Compared to the rest of the state, we look great. Our surrounding states are beating us on everything. • EP - Compared to the rest of the state, we look great. Our surrounding states are beating us on everything. • EP requires a lot of natural gas supply, need an additional feed • EPTA does not go to Morgan County • Expectation of services due to location • Growth is causing issues, limitations on taxes are stifling ability to raise revenues to meet demands on growth • Having to turn away commercial opportunity due to lack of water • high number of state agency vacancies • Home Rule Program - Limitations Challenges • Housing in general. Apartments and townhomes. Lack of supply for new employees. Lack of diversity • Infrastructure - fiber, water, sewer for expansion and retention • Infrastructure - lack of water infrastructure. Getting water throughout Berkeley County and the region. • Infrastructure and Services - Struggle to get mortgages, cell service, broadband, communication (Newspaper and Radio) • K-12, Higher education, behind on education, scorecard is negative in the region; state laws • Lack of amenities and night life for youth (20-40 year old's) • Lack of available public transit to parks/events/human services |
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<ul style="list-style-type: none"> • Increasing population - utilities and broadband providers coming to this area. Remote work opportunities • Industrial employers - increases population • James Rumsey - career focused training in Berkeley County • Job opportunities for employment - keeping jobs in WV • Leadership - momentum for improvements • Leadership of professional organization - professionalism in government positions, department heads • Legislatures are available • less stigma for vulnerable populations • Local foods • Local governments contacting state EDC to help keep businesses here and attract new businesses • Location - proximity to 3 international airports • Location and ability to pull in resources • Location for business opportunities, proximity to major metro areas • Manufacturing cluster - Caperton, P&G, Rockwood • MARC Train - JC residents commuting to work • MARC Train and Amtrak- Diverse multimodal transportation access opportunities • Marketing campaign on what we actually have here in the EP and state • Mental Health - substance abuse, day report centers, VA Center • Modernization of EMS • Natural Resources - Unique topography - fishing and unique opportunities • Opportunities for youth to find a career path. Obtain a HS diploma and find a career. • Opportunity to health care - healthy living - hospitals • Paid, professional, EMS staff - Only paid county fire department in WV, Public Safety • Partnerships with MD, PA, VA • Patient and resilient community • People - attitudes, willingness to help others, sense of community, personality, regional culture • Popularity of STEM and diversity in education (ex. robotics). Rumsey, Shepherd, BRCTC 	<ul style="list-style-type: none"> • lack of broadband and cellular access • lack of childcare • Lack of detox center and other social services for substance abuse • Lack of energy options • Lack of entrepreneur resources and difficult processes • lack of human services resources (homeless, domestic violence, emergency shelters) • Lack of land use and transportation linkage - car dependent areas, lack of walkability, lack of growth management • Lack of local non-federal match dollars for proejcts - transportation • lack of locality pay in state for public service workers and emergency personnel • Lack of localized taxing authority • lack of mental health services • Lack of Natural Gas • Lack of professional services • Lack of progress from PSC • Lack of progress from PSC • Lack of specialty care in the EP - health care • Lack of transportation to charter schools or colleges • Large population struggling to make ends meet 34% • Law enforcement training, mindset towards domestic violence • Limited local funds are not enough to match federal funds for operations or grants or projects • Local wages for public service cannot compete with surrounding states • Location in the region - takes time to get to our parks • MARC Train - Legislators do not understand the value of the MARC train and the commuters to DC • Marketing campaign - Harpers Ferry - partnerships can cause issues with how brochures are worded. Pigeon Holing • Mileage to Charleston - disconnect, centralized control out of Charleston. Lack of local control. Disrupts future planning? • Natural Gas has been halted - Environmental Issues with MD. • Need for utility capital outlay • Need for utility capital outlay
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<ul style="list-style-type: none"> • Post-secondary ED opportunities • Potomac River - tourism and water in the EP • Potomac River! Jim. O • Proximity to a variety of outdoor recreation opportunities (rock climbing, whitewater rafting, kayaking, fishing/hunting, etc.) within 1.5 hours • Proximity to Baltimore and Washington DC - location, post-COVID • Proximity to other National Parks and historic destinations • reactive to needs of community • Real Estate Market - availability of land and lack of zoning. Proximity to metro areas. Pro-growth perspective leadership • Regional Council - Region 9 • rich history of region • Safety aspect - area is very safe compared to other areas • Safety of our region, safe neighborhoods, strong police force • strong agriculture community/preservation of land • Support for Non-Profits both from governments and every non-profit • Transplants from other states, new people moving here • The growing outdoor industry and state parks and tourism • Topography - climate change? Reservoirs • Topography - flat and mountainous • Topography - less mountainous for development • tourism • Tourism at the state parks, racetracks • Tourism attractions - outdoor recreation opportunities, hiking, swimming, COVID highlighted this strength • Transportation resiliency - highways, size of airports, COOP-COG • Travel - destination from metro areas, regional side by side opportunity • Unique festivals and events in the region • US Air Guard - airport (MRB) is an asset • USDA, IRS, Coast Guard, Homeland Security - Fiber assets in region • Utilities working towards expansion, PSD, Water, Broadband - future thinking and investing infrastructure • Volunteerism and retirees working in the community and parks • Volunteerism in community - retirees and veterans 	<ul style="list-style-type: none"> • No child or adolescent mental health services • No satellite schools from WVU, etc. in the Eastern Panhandle • Not proactive to needs of community • Number of available employees and competitive pay - competing with surrounding counties in other states • Outdated public service resources • Overloading secondary roads due to a lack of growth management. Transportation system is not made for population growth. • Parks and Rec programming • Per Diem Rates on hotels - Losing to surrounding states • Perception of WV from other states - rebrand? • Population rate - growing faster than housing and infrastructure can handle. Affordable housing and lack of supply of houses • Post COVID workforce - attracting talent • Proximity to Baltimore and DC - Opioid epidemic, lack of treatment options • Relative location to Charleston - more involvement from leaders at the state capital • resistance to diversity • Roadway infrastructure - Growth has surpassed the quality of roads. Local and secondary roadways are unsafe • Roadway infrastructure and congestion • Safety on our roads and I81 - Traffic incident management • Schools are at max capacity • State government disconnect (self-sabotaging) • State Staffing and programming unknowns - existing conditions need to be addressed • State Staffing and programming unknowns - existing conditions need to be addressed • Subsidies for MARC riders? Incentivize riders to get on the train. Tax breaks? • Tax Structure - Personal property tax • Tax Structure for retirees • Tax structure is unclear - complex and poor tax mechanism. Hard to understand and attract businesses. "How to calculate tax burden"
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<ul style="list-style-type: none"> • Workforce coming from other states (PA, VA, MD) • WV Business Climate - promoting small businesses • WV Invests grant program (2 or 4 year degree) • WV lifestyle but has amenities of northern VA, MD • WV State Tourism Office - marketing our assets • WV Tourism Office - Regional Tourism, travel sports • WV's business culture and business climate, fair process to attract and retain businesses. Commitment to long-term career focused education. 	<ul style="list-style-type: none"> • Tax structure is unclear - complex and poor tax mechanism. Hard to understand and attract businesses. "How to calculate tax burden" • Teacher pay and other salaries • Teacher pay and other salaries • Uncontrolled development without taking into account groundwater/flood management. Lack of green infrastructure and stormwater • Uniform permitting process - hardest for permitting which causes projects to go elsewhere. WVDOT/WVDOH access, etc. is very tough. District 5 is the toughest in the state • Uniform permitting process - hardest for permitting which causes projects to go elsewhere. WVDOT/WVDOH access, etc. is very tough. District 5 is the toughest in the state • Unregulated septic systems • Utilities - water, electric, sewer, roads, broadband cannot keep up with infrastructure • Wages - Lifelong WV residents think that wages are already too high. Trouble attracting new employees who are out of state • Wages - Lifelong WV residents think that wages are already too high. Trouble attracting new employees who are out of state • Waiting 10 years until we wait for state funding • Walkability and nighttime atmosphere in surrounding states/cities • Water supply will not keep up with current growth and future expansion, public health and safety is in jeopardy. Trying to build infrastructure to sustain residential and commercial growth. • Workers unable to pass drug test • WV Tourism Office promoting private entities - Summit Point and Casino • WVDOT - Back roads (secondary) are so busy and unsafe for pedestrians, cars, and trucks. Lack of emphasis on growth counties
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OPPORTUNITIES

- Access to legislators
- Capturing youth (WVU and Marshall). Keeping them in West Virginia. Integrated technology in agriculture. Incentivize them to stay in WV
- CEDS Strategy - Legislative white paper about the point above ^.
- Communicate between employers and local officials - helping to recruit and retain young people
- Commuter population - what are their skillsets? Keeping those people in WV
- Culture and expanding mindset - Embracing new ideas
- Culture programming and planning
- Data center and cloud computing
- Discussions with Charleston and show a regional autonomy model. Display how the state can get an ROI from the EP
- Diversification or Events geared towards families (Food trucks, craft beer events, etc.)
- early childcare education programs
- Eastern Panhandle hire a marketing firm to sell its value to the rest of the state - tax dollars, jobs, current and future investment
- Eastern Panhandle rebranding from the rest of the state
- Education - Youth in the state and education in agriculture, STEM and Farm Bureau, 4H and FFA
- Getting ahead of the population growth and planning ahead - Getting ahead of the tsunami
- Health care expanding services - cardiology
- Increase public/Private Partnerships
- Increase small business government contractors - Procuring small businesses for government contracts – SBA
- investment in affordable youth and childcare
- Legislation willingness to modernize tax structure - plan that is properly structured
- Legislative policy change to provide harm reduction in shelters
- Leveraging land for mountain bike trail system in conjuncture with Cacapon
- New Bipartisan Infrastructure Law - New programs and grants
- Non Profit advocates at state level (part of economic impact)
- Opportunity to expand infrastructure

THREATS

- Amenities - lack of parks and rec.
- Attitudes - "Always done this way". Receptive of new ideas
- Broadband availability in rural areas
- Capacity issue at parks - safety and conservation, EMS services
- Consequences of being reactive rather than proactive of population growth
- Developer needs for utilities to install prospective infrastructure (PSC limitations). Increasing public/private partnerships
- Developer needs for utilities to install prospective infrastructure (PSC limitations). Increasing public/private partnerships
- Development fees - BOE needs
- Education - lack of coordination or future planning. Population growth may cause issues for systems in place for planning
- Education - performance levels are way down. Morgan County levels are very low
- Education and struggling to get people EMS certified - Response times are high
- EP - Compared to the rest of the state, we look great. Our surrounding states are beating us on everything.
- EP will miss opportunities since water/sewer/fiber are not available.
- Federal dollars go away with transit if population increases
- Federal grant opportunities - coal impact, distressed communities
- Food availability crisis
- Funding for secondary roads - project delivery, material, labor
- Inflation - cost of materials and labor
- Inflation - supply chain
- Interest rates for housing. This will affect housing costs and affordability
- Labor force participation rate
- Lack of ethnic diversity and acceptance
- Lack of funding for schools
- Lack of infrastructure to support population growth
- Lack of passengers on the MARC and Amtrak service to DC - Uncertainty of the service
- Lack of progress from PSC

<ul style="list-style-type: none"> • Parks and Rec Strategic Planning to meet the needs and gaps • Partnerships between agencies/nonprofits to attain goals • Planning - Coordination across the region • Political capital in Charleston from EP • Potential for a new commuter bus service - Northern VA • preservation of culture • Progress for education • Region planning for growth - capacity building and planning for funding • Regional Brand and owning the parks in our region - 4 National Parks in Harpers Ferry • Regional childcare licensing facilitator • Regional priority on water supply and expansion - Potomac River • Subsidies for MARC riders? Incentivize riders to get on the train. Tax breaks? • Supporting and training entrepreneurs and small businesses in WV - OneStop, SBDC • Telework/Remote working • Trails - Mountain Bike Trails, C&O Canal, Martinsburg, Route 9, US522 Bypass - local, small businesses can suffer but help with commute times with locals • Use MARC for other recreational destinations/purposes and expand west to Morgan County • Vibrant History • Volunteerism and retirees working in the community and parks • Wealth building - equity building • WV Invests grant program (2 or 4 year degree) • WV Site Ready Program (Still awaiting funding) - rights-of-way • Young adult and programming (attract and retain) 	<ul style="list-style-type: none"> • Lack of progress from PSC • Lack of shopping and grocery choices • Maintaining Quality of Life - population and transplants are causing issues • Need a natural gas feed from neighboring states, failing to allow businesses to expand and attract businesses • Need for utility capital outlay • Need for utility capital outlay • non progressive State legislature policies and centralization of government • O in-house planning • Opioids in the community - Substance abuse • Political climate • Political uncertainty • Population growth - could exceed capacity • Population loss • Skilled Labor - Inability to fill positions/backfill turnover • State Staffing and programming unknowns - existing conditions need to be addressed • State Staffing and programming unknowns - existing conditions need to be addressed • State Staffing and programming unknowns - existing conditions need to be addressed • Substance and social needs - low cost option for other states to put recovery centers here • Tax structure is unclear - complex and poor tax mechanism. Hard to understand and attract businesses. "How to calculate tax burden" • Tax structure is unclear - complex and poor tax mechanism. Hard to understand and attract businesses. "How to calculate tax burden" • Tax structure is unclear - complex and poor tax mechanism. Hard to understand and attract businesses. "How to calculate tax burden" • Teacher pay and other salaries • Telework/Remote working
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	<ul style="list-style-type: none">• Uniform permitting process - hardest for permitting which causes projects to go elsewhere. WVDOT/WVDOH access, etc. is very tough. District 5 is the toughest in the state• Uniform permitting process - hardest for permitting which causes projects to go elsewhere. WVDOT/WVDOH access, etc. is very tough. District 5 is the toughest in the state• Uniform permitting process - hardest for permitting which causes projects to go elsewhere. WVDOT/WVDOH access, etc. is very tough. District 5 is the toughest in the state• unmanaged growth exacerbated by hazards• US522 Bypass - local, small businesses can suffer but help with commute times with locals• Wages - Lifelong WV residents think that wages are already too high. Trouble attracting new employees who are out of state• Wealth gap• Workforce - cost of workforce will go up; this will affect finances• Workforce - living here and working somewhere else• Workforce - supply and training
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APPENDIX A – Region 9 SWOT Analysis Workshop Attendees

Monday, September 19, 2022 | 9:00 AM – 12:00 PM

Name	Organization
1. Alan J. Davis	Berkeley County Council
2. Eddie Gochenauer	Berkeley County Council
3. Randy Lilly	Berkeley County Office of Emergency Management
4. Shawn Wolford	Berkeley County Office of Emergency Management
5. Laura Hoffmaster	Berkeley County Planning
6. Ken Reed	Delegate 59th District
7. Elaine Bartoldson	Eastern Panhandle Transit Authority
8. Matt Mullenax	Hagerstown/Eastern Panhandle MPO
9. Michaela McDonough	Hagerstown/Eastern Panhandle MPO
10. Dennis Jarvis, II	Jefferson County Economic Development
11. Bill Clark	Morgan County Commission
12. Chad Winebrenner	Region 9 Board of Directors
13. Ron Bellows	RRBCCC
14. Alana Hartman	West Virginia Department of Environmental Protection
15. Don Forsht	West Virginia House of Delegates (Berkeley, 60)
16. Patricia Rucker	WV State Senate
17. Rachel Snavely	Eastern Panhandle Regional Planning & Development Council (Region 9)
18. Jennifer Wishmyer	Eastern Panhandle Regional Planning & Development Council (Region 9)
19. David Deamer	Eastern Panhandle Regional Planning & Development Council (Region 9)
20. Troy Truax	Michael Baker International, Inc.

Attendees – Monday, September 19, 2022 | 12:00 PM – 4:00 PM

Name	Organization
1. Kelly Smith	Cacapon Resort State Park
2. Scott Fortney	Cacapon Resort State Park
3. Liz Cook	City of Charles Town
4. Michaela McDonough	Hagerstown/Eastern Panhandle MPO
5. Dennis Jarvis, II	Jefferson County Economic Development
6. Bill Clark	Morgan County Commission
7. Leah Taber	National Park Service – Harpers Ferry National Park
8. Laura Bowman	Summit Point Motorsports Park/Training Facility
9. Jeff Johnson	Summit Point Raceway Associates
10. Mark Skinner	Summit Point Training Facility
11. Brian Bolyard	West Virginia Division of Natural Resources
12. Brad Reed	West Virginia State Parks
13. Rachel Snavelly	Eastern Panhandle Regional Planning & Development Council (Region 9)
14. Jennifer Wishmyer	Eastern Panhandle Regional Planning & Development Council (Region 9)
15. David Deamer	Eastern Panhandle Regional Planning & Development Council (Region 9)
16. Troy Truax	Michael Baker International, Inc.

Attendees – Tuesday, September 20, 2022 | 9:00 AM – 12:00 PM

Name	Organization
1. Conrad Lucy??	
2. Jennifer Smith	Berkeley County Development Authority
3. Shane Farthing	City of Martinsburg
4. Ken Reed	Delegate 59th District

5. Thomas Butcher	First Energy
6. Michaela McDonough	Hagerstown/Eastern Panhandle MPO
7. Daryl Cowles	Legislative/Regional Representative for WV Governor's Office, Governor Jim Justice
8. Lynch Christian	Monarch Development Group
9. Lyn Goodwin	Morgan County Economic Development Authority
10. James Owrey	Mountaineer Gas
11. Taylor McNally	Proctor & Gamble
12. Peter Christensen	Region 7 Workforce Development Board
13. Rachel Snavelly	Eastern Panhandle Regional Planning & Development Council (Region 9)
14. Jennifer Wishmyer	Eastern Panhandle Regional Planning & Development Council (Region 9)
15. David Deamer	Eastern Panhandle Regional Planning & Development Council (Region 9)
16. Troy Truax	Michael Baker International, Inc.

Attendees – Tuesday, September 20, 2022 | 12:00 PM – 4:00 PM

Name	Organization
1. Tiffany Hine	Blue Ridge Community Technical College
2. Stacie Rohn	Boys & Girls Club of the Eastern Panhandle
3. Andrea Brown Riley	Easter Panhandle Empowerment Center
4. Donna Van Metre	James Rumsey Technical Institute
5. Jennifer Verdugo	Jefferson County Christian Ministries
6. Jennifer Myers	Jefferson County Parks and Recreation Commission
7. Bondy Gibson-Learn	Jefferson County Schools
8. Michaela McDonough	Hagerstown/Eastern Panhandle MPO

9. Penny Porter	United Way of the Eastern Panhandle
10. Rachel Snavely	Eastern Panhandle Regional Planning & Development Council (Region 9)
11. Jennifer Wishmyer	Eastern Panhandle Regional Planning & Development Council (Region 9)
12. David Deamer	Eastern Panhandle Regional Planning & Development Council (Region 9)
13. Troy Truax	Michael Baker International, Inc.

APPENDIX B – REGION 9 SWOT WORKSHOP DISCUSSION ITINERARY

Date:	Monday – Tuesday, September 19 – 20, 2022
Time:	9:00 AM – 12:00 PM and 1:00 – 4:00 PM
Location:	Berkeley County Sheriff’s Office (Training Room) 510 S. Raleigh Street, Martinsburg, WV 25401
Meeting Name:	Region 9 CEDS SWOT Workshops

SWOT Workshops Itinerary

Topic:	Time:
1) Welcome and Introductions	9:00 AM
2) CEDS Overview a) Purpose and Need b) Requirements	9:15 AM
3) Region 9 CEDS (2019 – 2023) a) Vision and Goals b) Key Themes c) Goals	9:30 AM
4) SWOT Analysis a) Strengths b) Weaknesses c) Opportunities d) Threats e) Preliminary Key Themes Identification	10:00 AM
5) Open Discussion and Next Steps	11:45 AM

APPENDIX C – REGION 9 CEDS SWOT WORKSHEET

	Positives	Negatives
Internal <ul style="list-style-type: none"> • Infrastructure • Industry clusters • Workforce (business needs, training) • Municipal assets (quality of life) • Local and regional partners • Technical and financial resources • Parks and recreation resources • Cultural and natural resources • Economic resilience 	Strengths <ul style="list-style-type: none"> • What are the strengths of the region’s economy and local communities? • What businesses or industry clusters are strong? • What makes the region unique and distinguished from elsewhere? • What are the region’s competitive advantages in terms of infrastructure, business, workforce, quality of life, and partnerships? 	Weaknesses <ul style="list-style-type: none"> • What are the weaknesses of the region’s economy? • What are the region’s competitive disadvantages? • What makes the region risk-adverse or resistant to change? • How does the region measure against its competitors?
External <ul style="list-style-type: none"> • Regional competitors • National and global economies • Industry clusters • State and federal funding sources • Demographic shifts • Local, national, or international events • Unanticipated shocks (next pandemic) 	Opportunities <ul style="list-style-type: none"> • What opportunities exist to link the region to the broader national and global economies? • What opportunities exist to enhance the region’s industry clusters or supply chains? • What partnership or funding opportunities exist to improve the region’s economy? • How can the region position itself to respond to demographic shifts? 	Threats <ul style="list-style-type: none"> • What are the national or global obstacles challenging the region’s economy? • What external barriers impact business retention and attraction and population growth in the region? • What external factors pull the region’s businesses and citizens to other locations?

Strengths:

Weaknesses:

Opportunities:

Threats:

APPENDIX C – REGION 9 CEDS SWOT WORKSHOP PRESENTATION



**COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDDS)
FIVE YEAR UPDATE (2023-2027)**

SWOT ANALYSIS WORKSHOPS | SEPT. 19 – 20, 2022

Agenda

- Welcome and Introductions
- CEDS Overview
- Region 9 CEDS (2019 – 2023)
- SWOT Analysis
- Next Steps

Comprehensive Economic Development Strategy 2019 - 2023

*Eastern Panhandle Planning
and Development Council*

Draft/Amended 2021

Introduction and Vision

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

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

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

As background for the findings presented, this report includes:

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

COVID-19 Resiliency Update:

In response to the impacts of the COVID-19 pandemic, Region 9 has revised portions of this document to increase the region's resiliency.

CEDS Overview



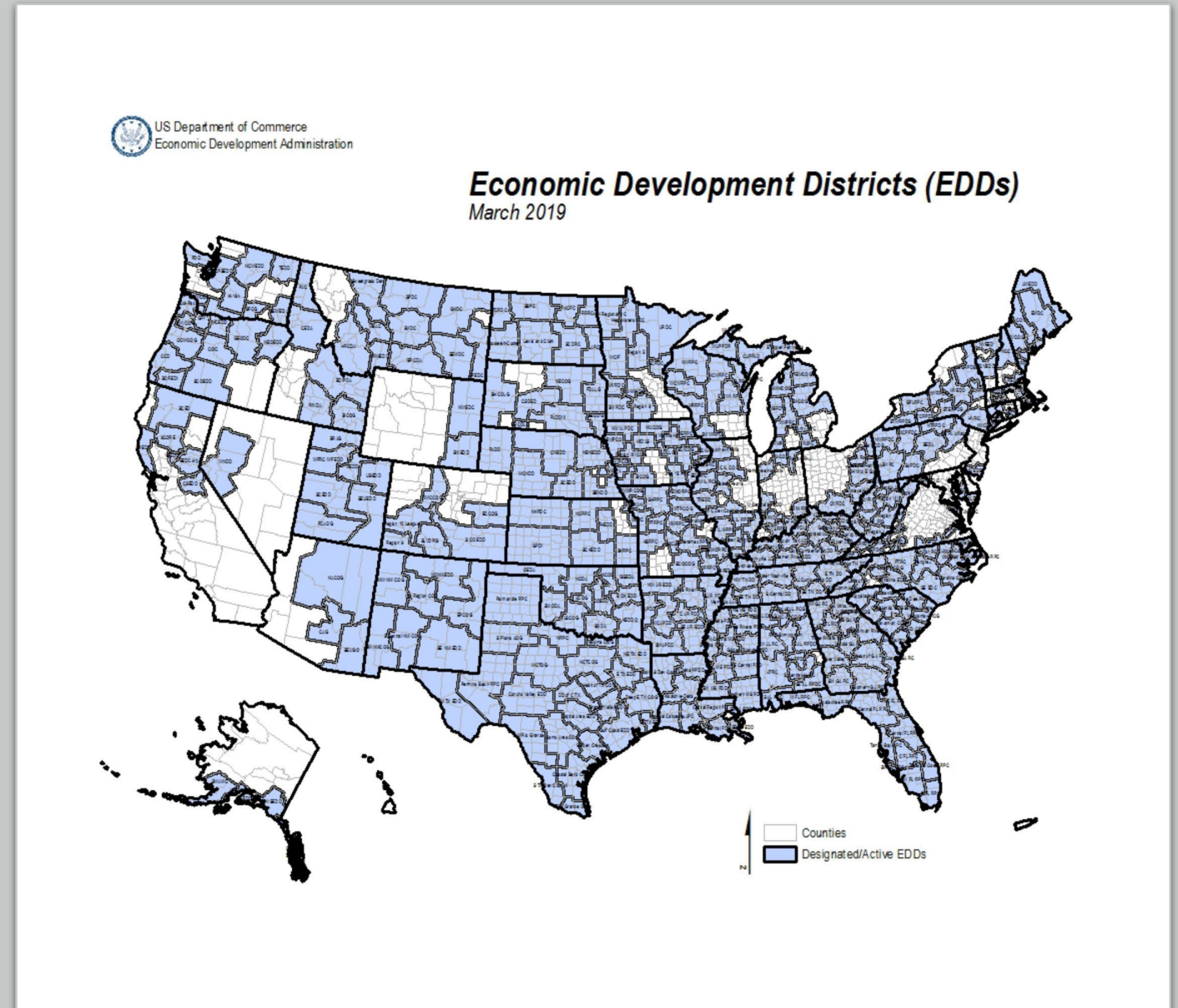
A strategy-driven plan for regional economic development.



Regionally-owned planning process designed to build capacity and guide the economic prosperity and resiliency of an area or region.

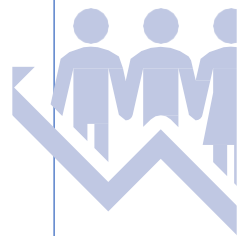
CEDS Overview

- Regions must update their CEDS at least every five years to qualify for EDA assistance under its Public Works and Economic Adjustment Assistance programs.
- CEDS is a prerequisite for designation by EDA as an Economic Development District (EDD).



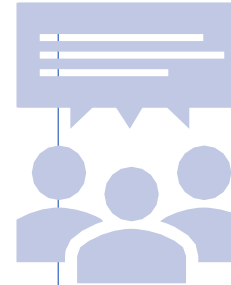
CEDS Overview

CEDS Content Requirements



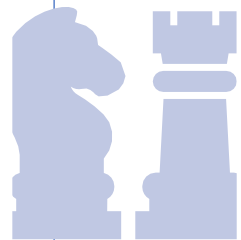
Summary Background

- A summary background of the economic conditions of the region;



SWOT Analysis

- An in-depth analysis of regional strengths, weaknesses, opportunities and threats (commonly known as a “SWOT” analysis);



Strategic Direction/Action Plan

- The strategic direction and action plan should build on findings from the SWOT analysis and incorporate/integrate elements from other regional plans.

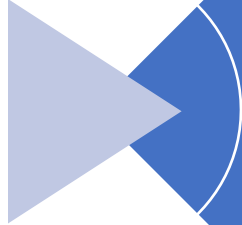


Evaluation Framework

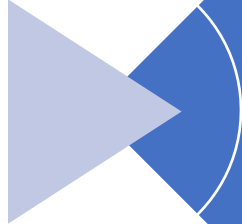
- Performance measures used to evaluate the organization’s implementation of the CEDS and impact on the regional economy.

CEDS Overview

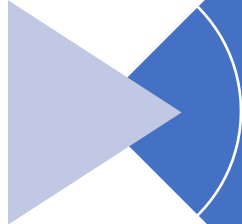
- CEDS must incorporate the concept of economic resilience (i.e., the ability to avoid, withstand, and recover from economic shifts, natural disasters, the impacts of climate change, etc.



Downturns or other significant events in the national or international economy which impact demand for locally produced goods and consumer spending;



Downturns in particular industries that constitute a critical component of the region's economic activity; and/or



Other external shocks (a natural or man-made disaster, closure of a military base, exit of a major employer, the impacts of climate change, etc.).

Region 9 CEDS (2019 – 2023)

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

Economic Resiliency







Preventing



Withstanding

Recovering

Goals, Objectives, and Strategies

Objective 1.B.	Improve, expand, and preserve existing water/sewer infrastructure	
	Strategy 1.B.1	Work closely with Utility Directors and Managers to understand and identify rehabilitation, expansion, capacity needs and projects
	Strategy 1.B.2	Research and report on new or under utilized funding/financing opportunities which include but are not limited to WIFIA, US Army Corp 571, Chesapeake Bay, and Clean Water Act 319, etc.
	Strategy 1.B.3	Work with local drinking water utilities to assist in implementing their Source Water Protection Plans.
Objective 1.C.	Support a diverse and resilient transportation network	
	Strategy 1.C.1	Encourage and support the work of the Hagerstown Eastern Panhandle Metropolitan Planning Organization (HEPMPO) by participation in the planning process for new roadway improvements and highway intersection upgrades as warranted by the growing population and traffic within the region.
	Strategy 1.C.2	Support and inform all communities on all transportation infrastructure planning and project funding opportunities. Provide this support when practical to Morgan County that is not within the jurisdiction of the HEPMPPO.
	Strategy 1.C.3	Assist the Eastern Panhandle Transit Authority construct a system that better meets the demand for transit service within the agency's service area as identified in their recent Transit Development Plan. (Link)
	Strategy 1.C.4	Assist with identification of funding sources to improve/expand trail network, regional bike plan
	Strategy 1.C.5	Assist with communicating "Roads to Prosperity" projects occurring within Morgan, Berkeley, and Jefferson Counties. Project List Link
	Strategy 1.C.6	Review existing, relevant transportation studies to determine Region 9's role in assisting with the implementation, such as https://www.i-81coalition.org/projects.html and https://www.hepmo.net/studies
	Strategy 1.C.7	Improve access and walkability to critical and essential facilities.
Objective 1.D.	Maximize opportunities of alternative sources of energy which promote resiliency	
	Strategy 1.D.1	Identify and determine how businesses can gain access to natural gas
	Strategy 1.D.2	Promote programs that promote energy efficiency and supply renewable energy to local businesses and residents
	Strategy 1.D.3	Work with County and Regional Homeland Security Emergency Management to review energy redundancy needs.

Region 9 CEDS (2019 – 2023)

Key Themes Emerging from the 2019 – 2023 SWOT Analysis

Continue to improve infrastructure, with a focus on broadband access, public transportation, and walkability.

Provide regional support for small businesses and entrepreneurs.

Enhance communication platforms within and between local governments and their agencies.

Strengthen Workforce Development networks between employers and educational system.

Support general and social needs programs for vulnerable populations.

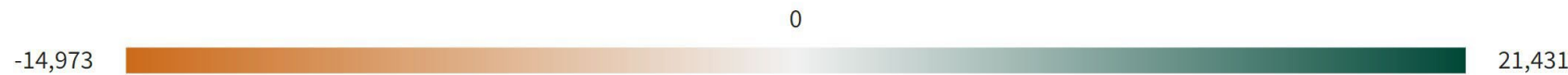
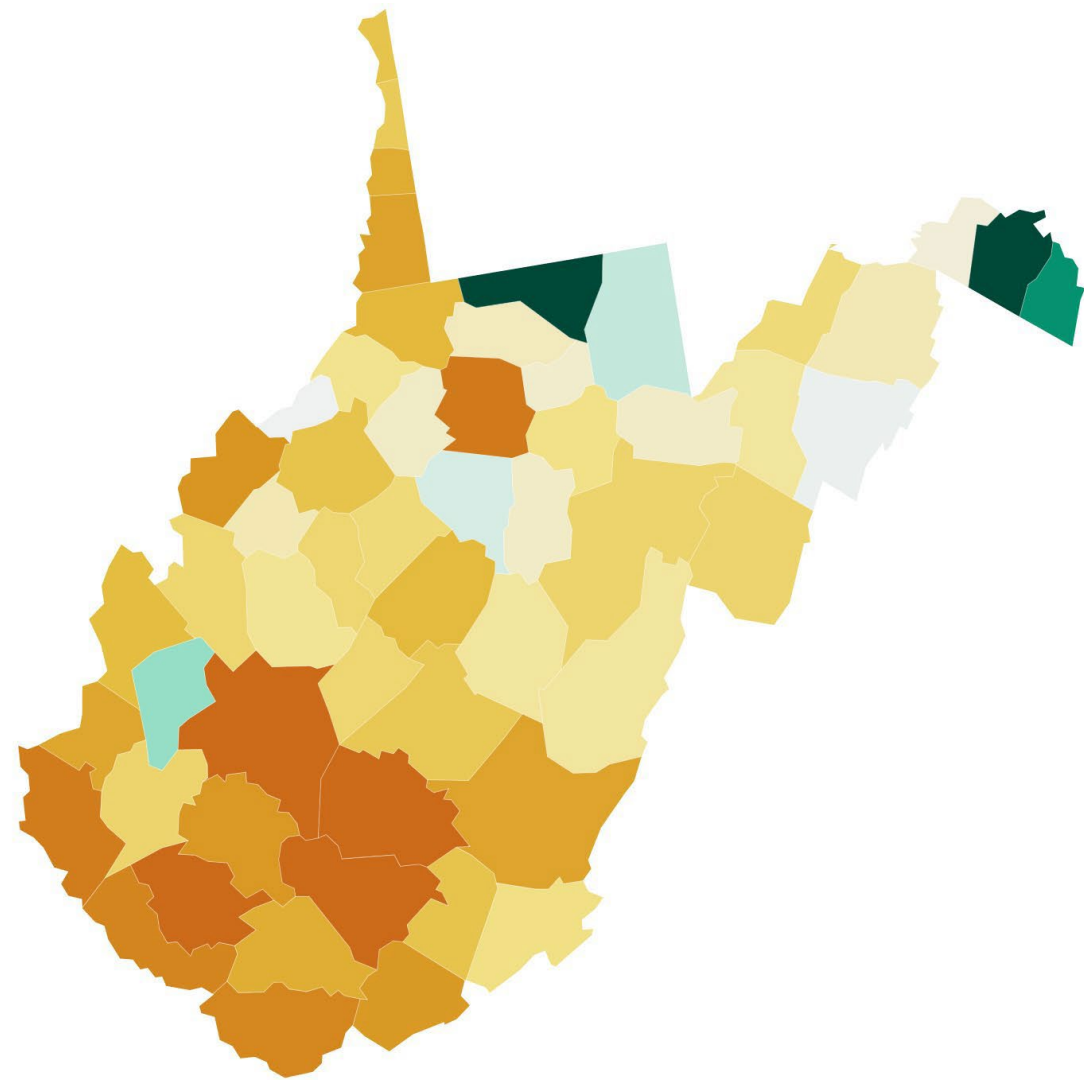
Region 9 CEDS (2019 – 2023)

Goal #1 : Ensure adequate quantity and quality of infrastructure and resources to remain competitive with surrounding states.

Goal #2 : Create an environment where all have a chance to prosper.

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

- Berkeley County had the largest growth with 21,431 more residents.
- Jefferson County grew by 4,758.
- Morgan County decreased by 278.

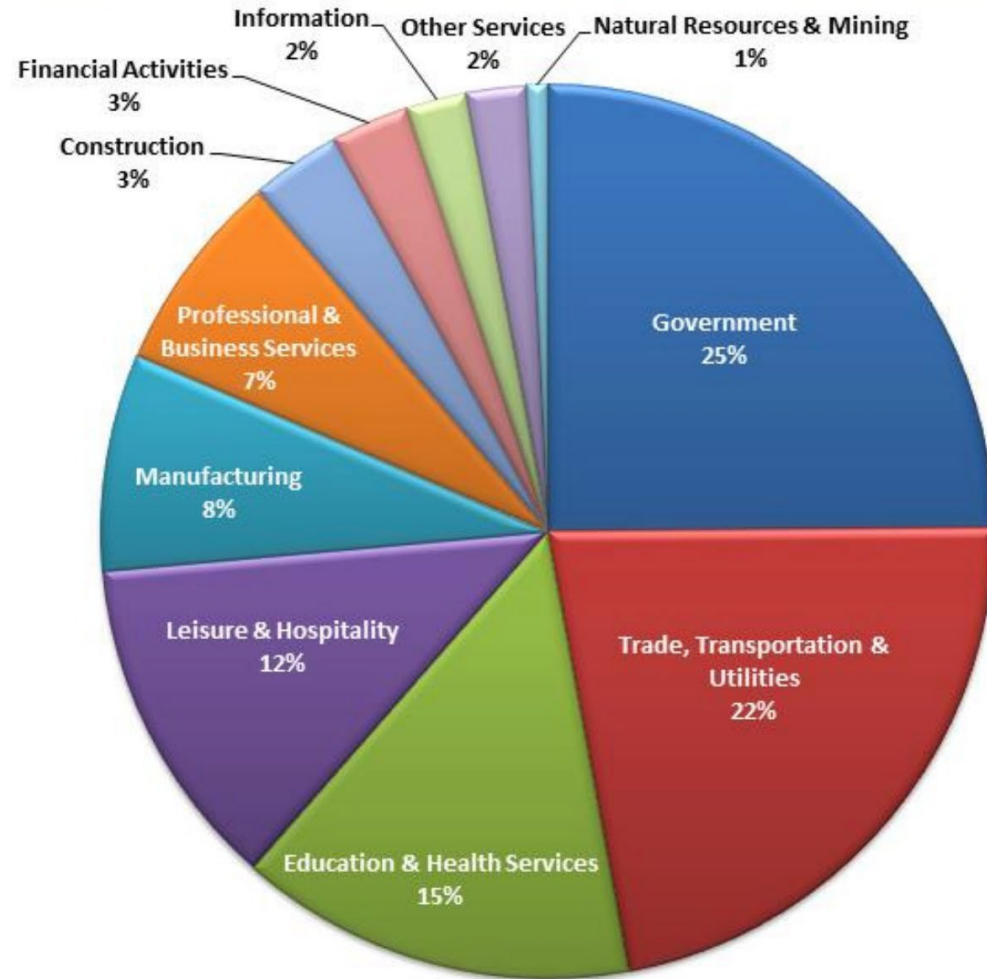


POPULATION CHANGE BETWEEN 2010 AND 2021

Source: USAFacts.org

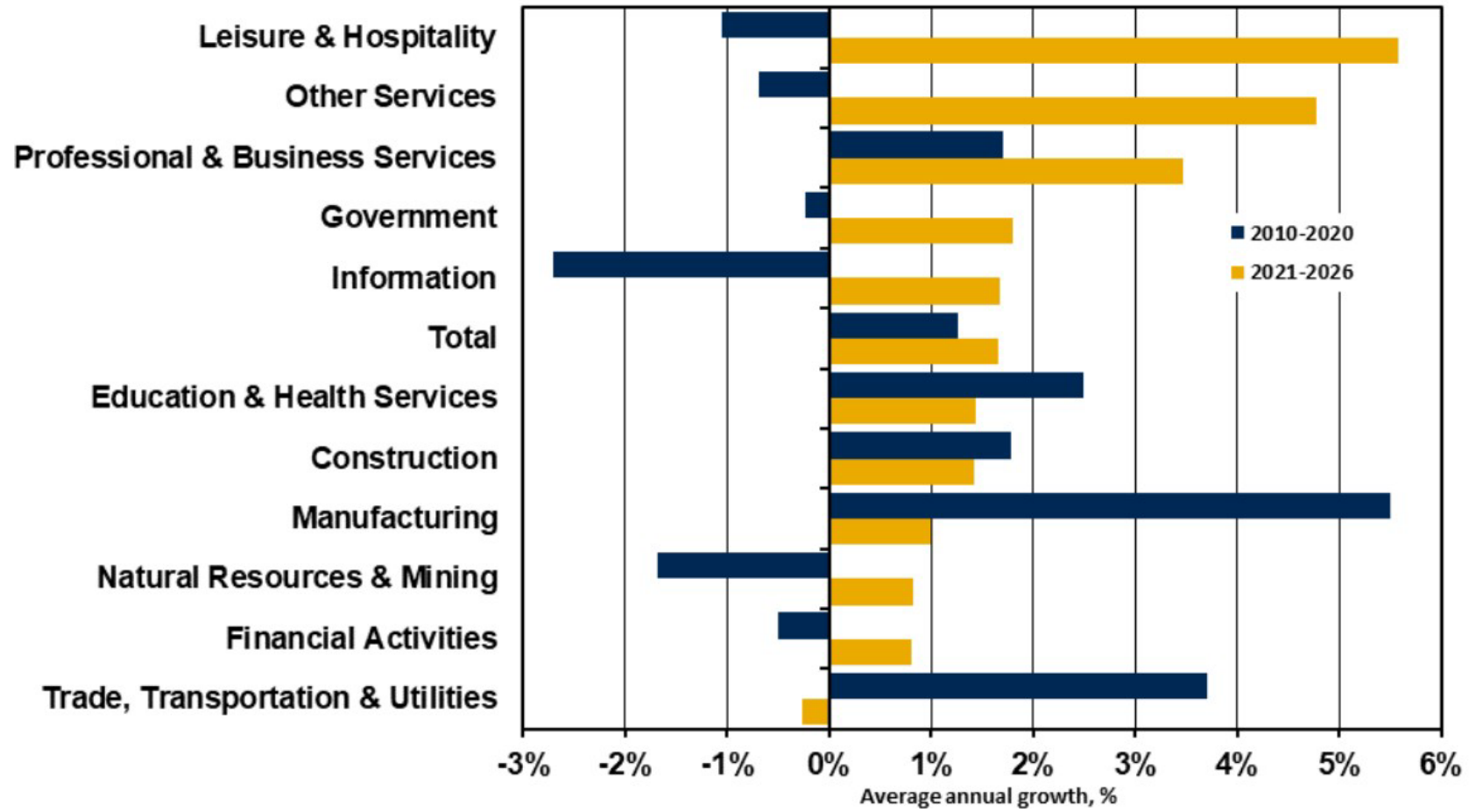
- The Eastern Panhandle (EPH) has been the state's strongest economic region for well over a decade, experiencing sustained growth in population, employment, income and a host of other major economic indicators.
- The three-county area has recovered nearly all the jobs lost during the COVID-19 recession and has seen its workforce return to pre-pandemic levels.

Figure 3: Eastern Panhandle Employment Distribution by Sector



Source: The Eastern Panhandle Economic Outlook: 2022-2026

Figure 12: Eastern Panhandle Employment Growth Forecast by Sector



Source: The Eastern Panhandle Economic Outlook: 2022-2026

SWOT Analysis

Strengths

The region's relative competitive advantages (e.g., industry supply chains and clusters, extensive port, rail, and broadband assets, specialized workforce skills, higher education levels, collaboration among stakeholders) and often are internal in nature;

Weaknesses

The region's relative competitive disadvantages (e.g., a risk-averse or change-resistant regional culture), also often internal in nature;

Opportunities

Chances or occasions for regional improvement or progress (e.g., expansion of a biosciences research lab in the region), often external in nature; and

Threats

Chances or occasions for negative impacts on the region or regional decline (e.g., several companies in the region considering moving to lower-cost areas of the state), also often are external in nature.

SWOT ANALYSIS



	Positives	Negatives
<p>Internal</p> <ul style="list-style-type: none"> • Infrastructure • Industry clusters • Workforce (business needs, training) • Municipal assets (quality of life) • Local and regional partners • Technical and financial resources • Parks and recreation resources • Cultural and natural resources • Economic resilience 	<p>Strengths</p> <ul style="list-style-type: none"> • What are the strengths of the region's economy and local communities? • What businesses or industry clusters are strong? • What makes the region unique and distinguished from elsewhere? • What are the region's competitive advantages in terms of infrastructure, business, workforce, quality of life, and partnerships? 	<p>Weaknesses</p> <ul style="list-style-type: none"> • What are the weaknesses of the region's economy? • What are the region's competitive disadvantages? • What makes the region risk-adverse or resistant to change? • How does the region measure against its competitors?
<p>External</p> <ul style="list-style-type: none"> • Regional competitors <ul style="list-style-type: none"> ▪ National and global economies ▪ Industry clusters • State and federal funding sources <ul style="list-style-type: none"> ▪ Demographic shifts • Local, national, or international events <ul style="list-style-type: none"> ▪ Unanticipated shocks (next pandemic) 	<p>Opportunities</p> <ul style="list-style-type: none"> ▪ What opportunities exist to link the region to the broader national and global economies? • What opportunities exist to enhance the region's industry clusters or supply chains? • What partnership or funding opportunities exist to improve the region's economy? • How can the region position itself to respond to demographic shifts? 	<p>Threats</p> <ul style="list-style-type: none"> ▪ What are the national or global obstacles challenging the region's economy? • What external barriers impact business retention and attraction and population growth in the region? • What external factors pull the region's businesses and citizens to other locations?

Strengths:

Weaknesses:

Opportunities:

Threats:

Next Steps

- CEDS Strategy Committee develop draft goals/strategies based on these SWOT sessions
- Region 9 staff prepare full draft of 2023-2027 CEDS
- Draft CEDS out for 30-day public comment
- Approval of CEDS by Region 9 Full Council
- Submit to EDA



“Thank you”