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TECHNICAL MEMORANDUM - DRAFT

TO: Rachel Miller, J.D., Executive Director
Eastern Panhandle Regional Planning and Development Council (Region 9)

FROM: Troy D. Truax, AICP, Project Manager and Technical Lead
Michael Baker International, Inc.

DATE: September 14, 2026

SUBJECT: Region 9 Comprehensive Economic Development Strategy (CEDS) SWOT Analysis

Introduction

This technical memorandum summarizes the results of the Strengths, Weaknesses, Opportunities, and Threats (SWOT) stakeholder engagement process conducted for the Eastern Panhandle Regional Planning and Development Council (Region 9) Comprehensive Economic Development Strategy (CEDS) five-year update. Region 9's technical consultant, Michael Baker International, Inc. (Michael Baker), facilitated a series of four interactive stakeholder workshops in Martinsburg, West Virginia, on August 31 and September 3, 2026, to gather local and regional perspectives on the economic conditions, assets, challenges, opportunities, and risks affecting Berkeley, Jefferson, and Morgan counties.

The stakeholder workshops were organized around four primary discussion groups: local government, planning commissions, boards, and committees; civic and non-governmental organizations; economic development, commerce, and workforce development; and tourism and small business. Each session was designed to introduce participants to the purpose and requirements of the five-year CEDS update and to obtain input on regional priorities that may inform the strategic direction, action plan, evaluation framework, and economic resilience components of the plan.

Using an industry-standard SWOT framework, participants were asked to assess Region 9's internal strengths and weaknesses, as well as external opportunities and threats, from both regional and county-specific perspectives. The discussions emphasized how the region can build upon its strategic location, diversified economy, natural and historic assets, workforce-development resources, and quality-of-life advantages while addressing infrastructure capacity, housing affordability, workforce retention, funding constraints, and other growth-related pressures.

Each SWOT meeting was facilitated by Troy Truax, AICP of Michael Baker using the outline structure:

- Welcome and Introductions – All attendees formally introduced themselves.
- CEDS Overview – Troy presented a series of PowerPoint slides that gave insights and background to the Region 9 CEDS update process including the need to obtain stakeholder engagement through the SWOT analysis.
- Region 9 CEDS (2023 – 2027) – Troy presented the goals and objectives specified in the current five-year CEDS.
- SWOT Analysis – Troy facilitated the stakeholder discussion to identify the Region's Strengths, Weaknesses, Opportunities, and Threats.
- Next Steps – A summary of how the SWOT results will be used by Region 9 to help update the CEDS and Region 9's process and timeframe for completing the update.

Region 9 also administered an online SWOT survey to afford stakeholders who could not attend an in-person meeting the opportunity to provide their inputs to the analysis. A total of nine respondents participated in the survey and their responses are included in the overall SWOT summary findings.

The following sections provide a comprehensive summary of the overall stakeholder SWOT inputs, followed by detailed summaries of each stakeholder workshop.

Region 9 CEDS Overview Presentation (Attached PowerPoint)

Troy Truax opened the SWOT meetings by providing an overview of the Region 9 Comprehensive Economic Development Strategy (CEDS) update and explaining its role as the region's five-year strategic economic development plan for Berkeley, Jefferson, and Morgan counties. He noted that Region 9, as the federally designated Economic Development District, must maintain an approved CEDS to retain its designation and remain eligible for certain federal funding opportunities.

Troy summarized the required components of the CEDS, including the regional profile, SWOT analysis, strategic direction, action plan, prioritized investment strategies, performance measures, and economic resilience element. He explained that the current CEDS is organized around infrastructure, education and workforce, quality of life, and regional competitiveness, with the next update expected to guide Region 9's economic development priorities for the 2027–2031 planning period.

Troy also emphasized Region 9's strategic advantages, including its location along the I-81 corridor, proximity to major metropolitan and federal markets, diversified industry base, outdoor recreation and tourism assets, health care investments, airport-related opportunities, and higher education and workforce-training institutions. At the same time, he noted that rapid growth, infrastructure capacity, housing affordability, workforce retention, funding limitations, and competition from surrounding states remain critical issues for the region.

To guide stakeholder input, Troy reviewed the purpose of the SWOT exercise and explained how strengths, weaknesses, opportunities, and threats would be classified and incorporated into the updated CEDS. He encouraged participants to provide input from regional, county, local, organizational, and agency perspectives and described the process for supplementing the in-person discussions with an online survey, consolidating the results, and using a follow-up prioritization process to identify the most important regional economic development issues.

Overall SWOT Results Summary

Key Themes

- **Strategic location and regional competitiveness:** Region 9's proximity to Washington, D.C., Northern Virginia, Maryland, Pennsylvania, major East Coast markets, Interstate 81, rail corridors, and the Eastern West Virginia Regional Airport remains one of its strongest competitive advantages, while also exposing the region to intense competition for workers, investment, visitors, incentives, and services.
- **Growth pressure on infrastructure and public services:** Population and economic growth are creating sustained demand for transportation capacity, water and sewer service, electric power, broadband, public safety, transit, parks, childcare, housing, and social services. Stakeholders repeatedly emphasized that growth is outpacing the region's ability to fund, maintain, and expand supporting infrastructure.
- **Workforce, education, and wage competitiveness:** The region benefits from higher education, technical training, aviation programs, community colleges, and a strong workforce-participation base, but faces shortages in skilled trades, hospitality, healthcare, public safety, education, manufacturing, and customer-service occupations. Wage competition with nearby states and limited higher-wage professional jobs remain recurring concerns.
- **Housing affordability and cost of living:** Although the Eastern Panhandle remains relatively affordable compared with nearby metropolitan markets, rising housing prices, rents, childcare costs, and everyday living expenses are reducing workforce affordability and creating challenges for young adults, first-time homebuyers, service workers, teachers, public-safety personnel, and long-time residents.
- **Quality of life, tourism, and community identity:** Participants consistently identified outdoor recreation, historic downtowns, national parks, trails, wellness assets, parks, healthcare, youth facilities, and community events as core regional strengths. Stakeholders also emphasized the need to better market the region, coordinate events, strengthen downtowns, and protect the character that makes the region attractive.
- **Funding, governance, and fiscal capacity:** Stakeholders raised repeated concerns about limited state and federal funding, slow award and approval processes, state constraints on local revenue tools, uneven return of state-generated revenue, limited funding for economic-development districts, and the gap between capital grants and long-term operations and maintenance needs.
- **Economic diversification and emerging industries:** The region's diversified economy, manufacturing base, logistics assets, federal employment connections, aviation activity, healthcare investment, tourism economy, and data-center potential were viewed as important assets. However, stakeholders also emphasized the need to convert growth into resilient, higher-wage, locally beneficial employment and business investment.
- **Regional collaboration and coordination:** Partnerships among local governments, Region 9, economic-development organizations, nonprofits, schools, colleges, employers, and community organizations were identified as major strengths. At the

same time, participants noted opportunities to improve regional branding, shared event coordination, infrastructure planning, land-use alignment, and statewide advocacy.

- **Environmental resources and resilience:** Water supply, groundwater, karst conditions, severe weather, flooding, utility reliability, and disaster-response capacity emerged as important resilience issues. Stakeholders connected economic resilience with hazard mitigation, infrastructure reliability, cybersecurity, public safety, and the region's ability to withstand economic or natural disruptions.

Strengths

- Strategic Mid-Atlantic location with access to Interstate 81, nearby metropolitan markets, federal agencies, military-related activities, rail corridors, inland ports, MARC service, and the Eastern West Virginia Regional Airport.
- Strong natural, historic, cultural, recreational, wellness, downtown, and tourism assets, including national parks, trails, Berkeley Springs, Harpers Ferry, the C&O Canal, Summit Point, spas, rivers, parks, and historic communities.
- Growing population, strong workforce participation, relative affordability, and access to a multi-state labor market that support continued economic activity and regional competitiveness.
- Diversified regional economy with strengths in logistics, distribution, manufacturing, transportation, healthcare, tourism, federal services, technology-related sectors, and public-safety/emergency-management activities.
- Strong institutional and workforce-development assets, including Shepherd University, Blue Ridge Community and Technical College, James Rumsey Technical Institute, Marshall University aviation programs, Berkeley County Schools initiatives, STEMforce, CodeForce, and state-supported training programs.
- Collaborative relationships among Region 9, local governments, economic-development organizations, nonprofits, higher education, schools, employers, tourism partners, and community organizations.
- Ongoing public and private investment in quality-of-life assets, including healthcare expansion, recreation facilities, the YMCA, Boys and Girls Club expansion, parks, greenways, aviation training, and smaller rural-community projects.
- Available or emerging development assets, including industrial and commercial sites, airport capacity, rail access, business parks, downtown reinvestment opportunities, and site-selection coordination through the Eastern West Virginia Economic Alliance.
- Community pride, volunteerism, leadership receptiveness, and interest in proactive planning, local investment, innovation, green infrastructure, and quality-of-life improvement.

Weaknesses

- Aging, insufficient, or underfunded transportation, water, sewer, stormwater, broadband, cellular, electric, sidewalk, bridge, transit, park, and public-service infrastructure relative to current and projected growth.

- Housing affordability challenges, including limited starter homes, limited rental options, investor purchases of housing supply, high rehabilitation costs, and reduced ownership opportunities for younger households and local workers.
- Workforce shortages and recruitment challenges in skilled trades, healthcare, manufacturing, public safety, education, hospitality, tourism, retail, restaurants, customer service, construction, and technical occupations.
- Wage competitiveness issues compared with Maryland, Virginia, Washington, D.C., and Pennsylvania, particularly for teachers, public-sector employees, hospitality workers, service-sector employees, and other essential workers.
- Limited availability of shovel-ready, fully serviced industrial and commercial sites, especially where water, sewer, broadband, transportation, and utility infrastructure are not yet sufficient.
- Childcare shortages, limited infant and shift-work care, high operating costs, and dependence on state support, which constrain labor-force participation and family stability.
- Education and workforce-retention concerns, including teacher shortages, pay disparities, youth outmigration, skills gaps, school-performance concerns, and limited pathways into higher-wage local careers.
- Limited municipal and regional fiscal capacity, including constrained local revenue authority, dependence on state and federal grants, insufficient funding for economic-development districts, and weak long-term operations and maintenance funding.
- Fragmented or inconsistent land-use regulations, planning approaches, zoning capacity, and development standards across counties and municipalities, creating uneven growth patterns and service impacts.
- Underused, vacant, deteriorating, or investor-held downtown and historic properties that require substantial rehabilitation and are difficult for small businesses or local investors to reuse.
- Gaps in mental health, homelessness, emergency housing, transitional services, senior services, and other supports for underserved populations.
- Limited communication, marketing, and coordination tools for regional events, services, amenities, business resources, and public understanding of local government and infrastructure systems.

Opportunities

- Advance coordinated infrastructure-led development by investing in water, sewer, transportation, broadband, electric, logistics, business-ready sites, bridges, trails, parks, and transit assets.
- Leverage federal, state, and local funding programs, including transportation reauthorization, STIP project evaluation, broadband investments, bridge funding, historic tax credits, Opportunity Zone 2.0, New Markets Tax Credits, EDA, CDBG, and other grant programs.
- Expand aviation, aerospace, aircraft maintenance, repair and overhaul, air-traffic-control training, defense-related activity, airport-based industry, and supply-chain opportunities linked to Marshall University, the regional airport, and federal facilities.

- Grow workforce training, apprenticeships, internships, credentials, school-to-work programs, STEM and coding programs, employer-aligned curricula, Learn and Earn approaches, West Virginia Invest, and community-college partnerships.
- Increase attainable housing options, including workforce housing, starter homes, owner-occupied townhomes, condominiums, adaptive reuse, downtown housing, and mixed-use redevelopment.
- Expand childcare and youth-development capacity through schools, the YMCA, Boys and Girls Club, nonprofit partnerships, early-learning centers, and employer-supported models.
- Strengthen tourism, outdoor recreation, agritourism, heritage tourism, wellness tourism, motorsports, trails, riverfront access, regional itineraries, downtown experiences, events, and multi-state destination marketing.
- Advance downtown revitalization, adaptive reuse, historic preservation, infill development, façade and code-enforcement strategies, small-business support, and entrepreneurship resources.
- Use regional branding, ambassador programs, public communications, coordinated event calendars, and marketing campaigns to promote local assets, counter negative perceptions, attract talent, and retain young residents.
- Capture benefits from data centers, cloud technologies, federal contracting, cybersecurity, artificial intelligence, process modernization, and private investment while proactively managing utility, land-use, workforce, and fiscal impacts.
- Strengthen public-private partnerships and regional advocacy to align state investment, economic development, housing, workforce, infrastructure, tourism, and resilience priorities with Eastern Panhandle growth.

Threats

- Population and economic growth that could continue to outpace transportation, water, sewer, electric, broadband, public-safety, housing, childcare, social-service, and municipal-service capacity.
- State and federal funding limitations, grant delays, award-processing delays, unfunded mandates, potential federal spending reductions, and insufficient return of state-generated revenue to the Eastern Panhandle.
- Competition from Maryland, Virginia, Pennsylvania, Washington, D.C., and other nearby markets for workers, investment, businesses, visitors, incentives, services, retail spending, healthcare, and quality-of-life amenities.
- Housing affordability, rising rents, investor purchases, cost-of-living increases, childcare costs, and wage gaps that could reduce workforce attraction, workforce retention, and resident stability.
- Electric-power capacity limitations, water-supply constraints, groundwater and karst conditions, utility reliability concerns, and the high cost and long lead time for substations, transformers, transmission, and other infrastructure.
- Data-center and cloud-technology development that may increase revenue in some jurisdictions while creating utility, infrastructure, public-service, land-use, workforce, and fiscal impacts elsewhere without proportional local benefits.

- Loss of rural, agricultural, historic, cultural, downtown, and community character due to sprawl, poorly coordinated growth, underused historic buildings, loss of open space, or incompatible development patterns.
- Labor shortages, aging workforce, youth outmigration, teacher-retention challenges, hospitality staffing shortages, and loss of skilled workers to nearby higher-wage markets.
- Economic or market volatility, including employer downsizing, tourism shifts, bypass-related traffic changes, federal shutdowns or reductions, and reduced demand affecting low-wage or service-sector workers.
- Environmental, hazard, and resilience risks, including drought, flooding, severe weather, invasive species, cybersecurity vulnerabilities, disaster-response limitations, and public-safety service demands linked to growth and tourism.
- Cultural tension between long-time residents and newcomers, political polarization, negative perceptions of West Virginia, and fragmented state, regional, and local strategies that may limit coordinated action.

Most Identified SWOT Findings

Strengths

- Strategic Mid-Atlantic location with access to I-81, rail, the Eastern West Virginia Regional Airport, federal facilities, and major metropolitan markets.
- Strong natural, historic, recreational, wellness, tourism, downtown, and quality-of-life assets.
- Diverse economic base supported by logistics, manufacturing, healthcare, tourism, federal services, aviation, and technology-related activity.
- Education and workforce-development resources, including Shepherd University, Blue Ridge Community and Technical College, James Rumsey Technical Institute, Marshall University aviation programs, and local school initiatives.
- Strong regional partnerships among local governments, Region 9, economic-development organizations, nonprofits, schools, colleges, employers, and community groups.

Weaknesses

- Aging, insufficient, or underfunded transportation, water, sewer, stormwater, broadband, electric, park, transit, and public-service infrastructure.
- Housing affordability challenges, limited starter-home and rental options, investor activity, and rising costs affecting local workers and residents.
- Workforce shortages, wage competitiveness issues, teacher-retention concerns, and difficulty attracting and retaining young adults and skilled workers.
- Childcare shortages and limited availability of infant, early-learning, and shift-work care.
- Limited local and regional fiscal capacity, including constrained revenue tools, dependence on state and federal grants, and insufficient long-term operations and maintenance funding.

Opportunities

- Coordinate infrastructure-led development by investing in utilities, transportation, broadband, electric capacity, business-ready sites, bridges, trails, parks, and transit.
- Leverage federal, state, local, and private funding programs to advance priority infrastructure, housing, workforce, downtown, tourism, and resilience projects.
- Expand aviation, aerospace, aircraft maintenance, defense, cybersecurity, data-center, technology, and federal-contracting opportunities.
- Strengthen workforce training, apprenticeships, internships, employer-aligned credentials, school-to-work programs, STEM and coding initiatives, and community-college partnerships.
- Grow tourism, outdoor recreation, riverfront access, trail connectivity, heritage tourism, agritourism, wellness tourism, downtown revitalization, and regional destination marketing.

Threats

- Continued growth that could outpace infrastructure, utilities, housing, childcare, public safety, transit, social services, and municipal-service capacity.
- State and federal funding constraints, grant delays, unfunded mandates, and limited return of state-generated revenue to the Eastern Panhandle.
- Competition from nearby states and metropolitan markets for workers, investment, visitors, grants, incentives, retail spending, and professional services.
- Utility and environmental constraints, including electric-power limitations, water-supply uncertainty, groundwater and karst conditions, severe weather, flooding, and cybersecurity risks.
- Affordability pressures, wage gaps, loss of community character, cultural tension, and uneven fiscal impacts associated with rapid growth and major development projects.

Local Government, Planning Commissions, Boards, and Committees

SWOT Meeting #1 – Monday, August 31, 2026
9:00 – 11:00 AM | Martinsburg, WV

Participants:

- Andy Blake, City of Martinsburg, WV
- Ken Suits, City of Ranson, WV
- Misty Clingerman, Morgan County, WV
- Ron Davis, Town of Paw Paw, WV
- Wayne Clark, Delegate District 99
- Matthew Mullenax, Hagerstown Eastern Panhandle Metropolitan Planning Organization (HEPMPO)
- Randy Lilly, Berkeley County Office of Emergency Services
- Richard Dennis, Governor Patrick Morrisey
- Rachael Miller, Region 9
- Jennifer O'Brien, Region 9
- Dave Deeamer, Region 9
- Olivia Shores, Region 9

Facilitator: Troy D. Truax, AICP, Michael Baker International, Inc.

Meeting Materials:

- Agenda
- PowerPoint Presentation
- SWOT WorksheeT

Key Discussion Themes

- **Growth and infrastructure capacity:** Participants consistently linked rapid population and economic growth with mounting pressure on transportation, water, sewer, electric, public safety, and community-service systems.
- **Regional assets and competitiveness:** The discussion emphasized Region 9's strategic location, diversified economy, outdoor recreation, healthcare investments, airport assets, training institutions, and proximity to major markets as core competitive advantages.
- **Affordability and workforce stability:** Housing costs, childcare availability, wage competitiveness, teacher retention, and the cost-of-living gap were identified as central challenges affecting residents, employers, and public-service providers.
- **Funding and governance constraints:** Stakeholders raised repeated concerns about limited state and federal funding, slow grant award and approval processes, constrained local revenue authority, and uneven distribution of growth-generated revenues.

- **Emerging development pressures:** Data centers, cloud technologies, energy demand, land-use differences, and growth-related public-service impacts were discussed as opportunities that also carry significant infrastructure, fiscal, and community risks.
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SWOT Summary

Strengths

- Strategic location along the I-81 corridor with access to Washington, D.C., Northern Virginia, Maryland, Pennsylvania, and major East Coast markets.
- Diverse regional assets, including natural, historic, outdoor recreation, tourism, healthcare, airport, and public-safety resources.
- Strong education and workforce-development institutions, including Shepherd University, Blue Ridge Community and Technical College, James Rumsey Technical Institute, Marshall University aviation programs, and Berkeley County Schools initiatives.
- Availability of selected shovel-ready or developable sites, responsive economic-development partners, and regional site-selection coordination through the Eastern West Virginia Economic Alliance.
- Expanding healthcare, aviation, recreation, and public-safety investments that support quality of life and economic resilience.

Weaknesses

- Aging and insufficient transportation, water, sewer, electric, sidewalk, bridge, and public-service infrastructure relative to current and projected growth.
- Housing affordability challenges, limited starter-home and rental options, investor purchases of available housing, and rising living costs that affect workforce stability.
- Childcare shortages, education-performance concerns, teacher recruitment and retention issues, and wage competition with neighboring states.
- County-by-county differences in terrain, growth conditions, zoning, and land-use regulations that complicate regional consistency and service delivery.
- Limited municipal and regional funding capacity for operations, maintenance, capital improvements, economic-development districts, and long-term infrastructure needs.

Opportunities

- Use federal and state investments in broadband, bridges, surface transportation, trails, parks, and local infrastructure to address growth-related needs and improve regional competitiveness.
- Advance major economic-development and quality-of-life projects, including Project Allstar, the Berkeley County YMCA, new park development, aviation-related training facilities, and regional recreation assets.
- Expand diversified and attainable housing options, including owner-occupied townhomes or condominiums, to support young adults, first-time buyers, and the local workforce.
- Leverage the STIP benefit-cost process, regional collaboration, and economic-development partnerships to advance locally prioritized transportation and infrastructure projects.

- Capture benefits from data-center, cloud-technology, aviation, recreational, and tourism-related investment while addressing associated utility, land-use, and workforce impacts.

Threats

- State and federal funding constraints, award delays, unfunded mandates, and tax-policy limitations that restrict local governments' ability to maintain services and infrastructure.
- Population growth that could outpace transportation, utility, public-safety, childcare, housing, and social-service capacity, while reducing eligibility for certain transit operating funds.
- Electric-power limitations, groundwater constraints, karst conditions, and large-scale data-center demand that could limit development or raise infrastructure costs.
- Affordability pressures, wage gaps, internal displacement, and investor-driven housing activity that could make it harder for residents and essential workers to remain in the region.
- Uneven revenue distribution from major development projects that may create disparities between jurisdictions receiving new revenue and neighboring communities bearing service impacts.

Detailed Discussion Summary

Transportation Infrastructure

- Transportation was raised as a regional strength, including sections of Interstate 81 with three lanes in each direction. Troy noted that Maryland sought similar capacity and that Virginia's transportation agency had been examining ways to widen or expand portions of I-81; possible further expansion involving West Virginia was also mentioned, although the specific details were not fully stated.
- The discussion noted that a new public transit center was expected to be completed in July 2027.
- Population growth was described as both a regional strength and a weakness. It increased economic activity and development, but also placed additional pressure on roads, sidewalks, and other infrastructure that the Division of Highways already found challenging to maintain through system-preservation work.
- Participants said that population growth had outpaced the region's ability to expand transportation infrastructure, including increasing roadway capacity and redesigning intersections. They described the resulting challenge as maintaining safe movement while accommodating continued development.
- Richard identified road infrastructure and road funding as major regional weaknesses, noting that Berkeley County had received inadequate road investment for approximately eight to ten years while housing growth continued. He cited Route 9 as an example of severe congestion and described rapid commercial and residential growth along the corridor toward Interstate 81.

- Participants identified the lack of a diversified transportation network as a regional weakness, citing worsening congestion through Harpers Ferry and mountain corridors and the need to expand public transit, walking, and biking options alongside roadway capacity.

Regional Assets

- Richard noted that Region 9's three counties—Jefferson, Berkeley, and Morgan—differ substantially. The discussion identified location and terrain as positive attributes, while also noting that Morgan County had less flat land than Jefferson and Berkeley counties, creating different needs and priorities across the region.
- The discussion characterized Region 9 as diversified not only in its industries but also in its physical geography, with the counties' differing terrain and development conditions affecting regional planning priorities.
- Natural, historic, and outdoor recreation assets were identified as regional strengths, with participants noting that major highways and routes made these locations relatively easy to access.
- Healthcare investment was identified as a regional strength, including WVU Medicine's new hospital expansion in Ranson, Jefferson County, and Valley Health's presence serving Morgan and Berkeley counties.
- Tourism assets in Morgan County were identified as a regional strength, particularly the area's spas and natural springs.
- Participants highlighted the region's national parks, Appalachian Trail connections, and extensive local trail network as recreation assets that supported its quality of place and tourism potential.
- Project Allstar was discussed as a potential major economic-development opportunity involving an athletic complex, commercial and retail areas, and broader regional visitation. The state legislature had passed legislation enabling the project, but extending water and sewer infrastructure across the interstate remained a constraint.
- Berkeley County's recreational development pipeline included a YMCA project and a proposed new park of approximately 245 to 280 acres near Hammonds Mill Road, adding to the region's quality-of-life and recreation assets.
- Additional regional strengths included proximity to major population centers, with approximately 50% of the U.S. and Canadian populations located within a one-day drive; responsive state and development authorities for site selectors; full-career first-responder capacity; expanding airport-related education and development; and the Eastern West Virginia Economic Alliance's role in site selection.

Demographic Change

- The discussion attributed population growth to external growth combined with internal displacement, with newcomers attracted by employment opportunities, low property taxes, and quality of life. Participants noted that the resulting economic activity could increase rents and housing costs, reduce affordability, and contribute to the gentrification of locally established residents.

Education and Workforce

- Education and talent were discussed as benefits associated with population growth. Regional higher-education and workforce assets included Shepherd University, Blue Ridge Community and Technical College, and James Rumsey Technical Institute.
- Participants highlighted state-supported legislation and the Learn and Earn approach, under which industry could bring in equipment and trainers to provide organizational training. The region was also described as being within one day's drive of approximately 50% of the United States population.
- Childcare costs were discussed as potentially lower than those in surrounding states, but participants noted that the region's supply of available spots and the expense of operating or securing facility space required further examination. Licensing requirements and subsidies for childcare services were also raised, and the topic was considered both a potential regional weakness and an opportunity.
- Marshall University's presence at the airport was identified as a strength because the university was expanding its aviation programs, including a professional pilot program. Participants also discussed planned federal investment in a regional aviation training facility involving aircraft maintenance and air-traffic-control training.
- The discussion identified aviation-related workforce development involving Marshall University, the regional airport, and Berkeley County's Board of Education, including programming for juniors and seniors.
- Childcare was further characterized as a regional weakness because shortages increased the cost per available space, and demand for childcare services depended on state funding. The discussion also noted that vacancy and availability constraints affected service capacity.
- David compared the region's school system with those in Maryland and Pennsylvania and indicated that the comparison, particularly with areas approximately 15 miles north, raised concerns about the quality and competitiveness of local schools.
- Participants identified teacher shortages, educational performance, and teacher pay disparities as interconnected regional weaknesses. It was noted that the region had limited control over broader economic conditions but could influence teacher-related factors and staffing priorities.

Development Sites

- The availability of shovel-ready development sites was discussed as a regional asset, including sites with water, sewer, and other necessary infrastructure already in place.

Public Safety Infrastructure

- Participants described fire-service capacity as a regional strength, including the potential for full-time paid drivers to deploy apparatus while volunteer firefighters respond with turnout gear. This capacity also supported hazardous-material and rescue response, with specialized equipment available at each station.

Regional Demographics

- The SWOT discussion identified differences among Berkeley, Jefferson, and Morgan counties as a weakness because the counties had distinct conditions, needs, and

priorities. Participants also cited population gentrification and declining affordability as concerns, particularly as growth increased housing and living costs for established residents.

- The discussion characterized West Virginia as having experienced decades of economic and population extraction, while noting that the region had followed a different trajectory. One area was cited as having grown by 23% over roughly the past five years, compared with 9% growth in Jefferson County, while no other county in the state was said to have experienced positive growth.

Housing Affordability

- The discussion identified a severe shortage of quality, affordable housing for young couples, first-time buyers, and renters. Although new rooftops were being developed in areas such as Falling Spring, participants said much of the new supply was being purchased by outside or institutional investors rather than becoming accessible to local residents.
- Participants said institutional investors were purchasing fixer-uppers with cash, making it difficult for younger buyers to compete for entry-level homes. Investors were also reportedly buying new townhouses before completion and converting them to rentals, further limiting ownership opportunities and contributing to the region's affordability concerns.
- Housing opportunities included producing more condominiums or townhouses available for fee-simple ownership, rather than relying only on rental-oriented development. The discussion indicated that this type of housing could provide an ownership option for adults seeking to buy into the region.
- The discussion identified the gap between the cost of living and local wages as a regional threat. Participants also characterized the lack of affordable housing as a continuing concern, while noting that population growth and internal displacement could increase pressure on housing and services.

Land Use and Development

- Participants contrasted Jefferson County's restrictive zoning with Berkeley County's limited zoning and discussed how the difference affected development. Berkeley County's less restrictive approach was described as supporting economic growth by accommodating businesses that might not fit under Jefferson County's regulations, while also creating challenges in providing the public services required by that growth.
- Participants discussed the need for more uniform regulations between county and municipal governments. They said that consistent rules could help keep development moving while ensuring that municipalities receiving additional sales-tax revenue had the resources to provide services and remain economically competitive.

Social Services

- The discussion identified a growing need for services supporting underserved populations, including emergency housing, transitional services, and transportation access, while describing the existing capacity as inadequate.

Transportation Funding

- The discussion identified potential funding pressure for public transit as a future threat. As population growth brings urban areas closer to a 200,000-person threshold, participants said federal operating support for services such as EPTA could decline from an approximately 50/50 split, requiring municipalities to cover a larger share of operating costs.
- Participants contrasted the region's street-funding constraints with Virginia, where the state reportedly provided Strasburg more than $1 million annually for street maintenance. They noted that Martinsburg's water system dated to 1872 and that many infrastructure assets originated in or before the World War II era, creating a substantial maintenance backlog.
- Participants noted that municipalities could spend their entire annual quote-fund balance on street maintenance and still fail to keep pace, while receiving no local liquid-fuels allocation from the state. They discussed directing more sales-tax revenue to municipalities so local services and street funding could become stronger.
- The group identified substantial funding for local bridges as an additional transportation opportunity.
- The next statewide Statewide Transportation Improvement Program (STIP) round under the Morris administration was expected to use a more transparent benefit-cost analysis. Cities and counties would be able to submit projects for evaluation using the state's benefit-cost scoring process, improving the ability to advance locally prioritized projects.

Public Transit

- West Virginia's Division of Public Transit was described as providing funding to EPTA, which serves Brunswick-area riders and supports early and late trains, including service associated with Harper's Ferry and Martinsburg. Participants said existing transit services, including the transit center, free service, and Saturday service in Jefferson County, could become more difficult to sustain under changing funding conditions.

Rural Economic Development

- Participants identified slow population growth as a weakness for Morgan County, while Ron noted that Paw Paw lacked a restaurant and was not located along a major corridor, limiting business activity and local commercial options.
- Ron reported that Paw Paw's isolation was compounded by the absence of local businesses and jobs, even though approximately 2,200 vehicles passed through town each day because it served as an unofficial shortcut between western and northern routes and Interstates 81 and 95.

State Funding

- Participants identified the lack of state funding as a regional weakness, noting that state funding rules had removed a cap without adjusting the funding floor and had left communities with insufficient annual allocations.
- The discussion raised concerns that state priorities directed funding toward distressed or adversely affected communities elsewhere, while the region contributed substantially to state public funding but received only a comparatively small share in return.

Participants characterized the eligibility limits as inequitable, particularly for infrastructure needs.

- The group acknowledged that some communities had populations too large to qualify for certain grants while still lacking sufficient economic-development and workforce funding. The resulting gap limited their ability to finance needed projects and services.
- Participants reported that the Lightning's Greenway Trail grant had been pending for 20 months, including more than 12 months after the application process, and attributed the delay to significant state-level administrative delays in funding and project decisions.

Infrastructure Capacity

- Participants contrasted the region's funding challenges with the growth-related problems experienced by other counties. Those problems included water, highway, and other infrastructure demands, as well as the cost of maintaining a Department of Highways regional office; temporarily housing staff in hotels was described as less expensive than maintaining a permanent office.
- It was noted that operating costs for police officers, firefighters, sewer operators, and water operators could eventually consume municipal revenue, leaving no funding for capital improvements. This was especially concerning because cities had to maintain their own streets from general revenue rather than dedicated state funding.
- Participants identified federal and state investments in fiber-optic broadband as a newly emerging regional opportunity, noting that broadband deployment had expanded substantially over approximately the previous year and a half, partly because of the bipartisan infrastructure law.
- State-level delays affect decisions about how to proceed with design and construction improvements such as trails and sidewalks. The discussion connected these delays with limited state administrative capacity and the difficulty of advancing local infrastructure projects.
- The region faced a shortage of land and public infrastructure needed to support growth. Participants cited a previous Berkeley County analysis showing a shortfall of approximately 700 acres, a $1.2 million state parking account, and a 30-acre parking project estimated at $12 million as examples of the cost of meeting public-space and development demand.

Federal Funding

- The group discussed whether Appalachian Regional Commission programs were more oriented toward coal-producing regions, raising concern that the region's non-coal communities might have fewer opportunities to access those funds.

Funding Risks

- The group consolidated state and federal funding availability as an external threat to the region's economic development and infrastructure priorities.
- Participants described a funding cycle in which state and federal funding constraints, unfunded mandates, and tax and revenue caps left municipalities with little flexibility to support local operations. They noted that communities might have to raise taxes on residents even though their available tax base and allowable rates were limited.

- The discussion highlighted a potential fiscal disparity in Berkeley County, where data-center-related revenue was described as possibly reaching $27 million annually while Martinsburg could receive none. It was noted that $27 million was comparable to Martinsburg's entire general-fund budget, creating concern that one jurisdiction could gain resources for facilities such as fire stations while neighboring communities remained unable to meet basic service needs.
- Participants identified processing and award delays for state and federal funding as threats, alongside limited state funding for economic-development districts, dependence on federal and state sources, and state-law limits on local tax-policy authority.

Data Center Development

- The participants identified data centers as both an opportunity and a threat. Counties hosting data centers could receive substantial new revenue and use it to seek additional support for roads and other infrastructure, while neighboring municipalities could lose police officers, firefighters, public-works staff, and water and sewer operators to higher-paying jobs. The resulting competition could deepen service-capacity disparities because the Division of Highways had limited district staffing to support rapidly growing areas.
- Approximately 40 potential data-center properties had been identified in the region, but only three—Benzance, QTS, and the Southern Point project—had started the development process. None could yet issue a power certification because the required power capacity was not available, making speed to secure service a significant competitive factor.

Energy Infrastructure

- The three active data-center projects were expected to connect directly to the existing grid without building additional transmission lines, but they still lacked substations. New substations could take three to five years, and large transformers were reportedly about three years out from the time of order; building additional transmission capacity could cost more than $100 million and take two to three years, while transmission routes could also face local opposition.
- The group identified the lack of available electric-power supply as a threat to data-center development. Cloud technologies were characterized as both an opportunity and a threat, while population growth, surface- and groundwater availability, the gap between living costs and wages, and the shortage of affordable housing were also listed as external risks.

Water Resources

- Water availability and groundwater conditions were identified as regional threats, particularly because the area's karst geology increased the importance of managing groundwater and related infrastructure carefully.

Workforce Development

- Participants discussed workforce-housing approaches used by chicken-processing companies in another county, including company-built apartments, childcare support, and employee buses. They contrasted this proactive model with the risks of company-

town arrangements, noting that communities could be left with housing and water infrastructure they could not maintain if the major employer later closed or withdrew.

Civic and Non-Governmental Organizations

SWOT Meeting #2 – Monday, August 31, 2026.
1:30 – 3:30 PM | Martinsburg, WV

Participants:

- Joe Burton, Martinsburg-Berkeley County Parks and Recreation
- Melissa Gibbons, Martinsburg-Berkeley County Parks and Recreation
- Anne Myers, Blue Ridge Community Technical College
- Kim Miss, Blue Ridge Community Technical College
- Stacie Rohn, Boys and Girls Club
- Jeff McFarland, Senior Life Services of Morgan County, Inc.
- John Heminway, Anna Mae Reedy Senior Center (Jefferson County)
- Nicholas Diehl, Eastern WV Regional Airport Authority
- Rachael Miller, Region 9
- Jennifer O'Brien, Region 9
- Dave Deeamer, Region 9
- Olivia Shores, Region 9

Facilitator: Troy D. Truax, AICP, Michael Baker International, Inc.

Meeting Materials:

- Agenda
- PowerPoint Presentation
- SWOT Worksheet

Key Discussion Themes

- **Economic resilience and diversification:** Participants discussed Region 9's diverse employment base and its ability to withstand economic disruptions, while also noting the need for higher-wage professional, technical, and headquarters-based jobs.
- **Regional collaboration:** Stakeholders emphasized strong working relationships among governments, nonprofits, educational institutions, transportation providers, and community organizations as a major regional asset.
- **Quality of life:** Parks, recreation, healthcare access, community events, education, and affordability were identified as important factors in attracting and retaining residents, workers, and employers.
- **Growth pressures:** Rapid population and development growth are creating challenges related to infrastructure, public services, workforce availability, childcare, transportation, and community expectations.
- **Marketing and perception:** Participants noted opportunities to better promote the region's assets, counter negative perceptions, and improve awareness among residents, visitors, employers, and prospective workers.

SWOT Summary

Strengths

- Collaborative regional networks among governments, nonprofits, educational institutions, and service providers.
- Strong community pride, volunteerism, and engagement in local initiatives.
- Quality parks, recreation amenities, healthcare choices, and community-serving facilities.
- Strategic location near major metropolitan areas and transportation assets, including Interstate 81, rail corridors, the airport, and proximity to broader Mid-Atlantic markets.
- Access to workforce training, community college programs, higher education, and state-supported education programs.
- History of proactive planning, infrastructure investment, and quality-of-life initiatives across communities.

Weaknesses

- Difficulty attracting and retaining qualified workers, particularly for service-sector, technical, and higher-wage professional positions.
- Limited local availability of corporate headquarters, executive-level jobs, and certain advanced professional occupations.
- Childcare gaps, especially for infants, young children, and families with nontraditional or shift-work schedules.
- Infrastructure and service-capacity constraints associated with rapid growth, including funding limitations for operations, maintenance, and long-term asset management.
- Limited communication channels and coordination tools to help residents and visitors learn about regional events, services, and amenities.
- Variation in local regulations and planning approaches that may affect development patterns and regional consistency.

Opportunities

- Expand regional marketing and ambassador initiatives to promote the area's quality of life, tourism assets, employment opportunities, and community identity.
- Leverage education and workforce development grants to strengthen training programs and align them with regional employer needs.
- Coordinate events, recreation programming, tourism promotion, and nonprofit activities across jurisdictions to reduce silos and increase regional impact.
- Build on regional economic development committees and statewide organizational involvement to create new partnerships and bring resources back to the region.
- Enhance river, trail, recreation, tourism, and waterfront opportunities, including coordinated multi-county and multi-state visitor experiences.
- Use new and expanded recreation facilities, community centers, and youth-oriented amenities to support resident retention and attract new families.

Threats

- Competition from Maryland, Virginia, and other nearby states that may offer stronger financial incentives, deeper funding capacity, or more extensive services.
- Rapid external growth that may outpace local infrastructure, public services, planning capacity, and community expectations.
- Employer downsizing or market changes that could disproportionately affect lower-wage, service-sector, manufacturing, or shift-based workers.
- State-level funding and service-delivery limitations that may not fully account for the Eastern Panhandle's growth and needs.
- Insufficient dedicated funding for long-term operations, maintenance, equipment replacement, and asset management after capital projects are built.
- Potential impacts of emerging data center development, including utility demand, land use impacts, community concerns, and uncertain local benefits.

Detailed Discussion Summary

- The 2022 SWOT analysis identified regional infrastructure—including Interstate 81, the airport, public transportation, water and sewer systems—as a key theme, along with education and workforce placement and quality of life. The analysis also emphasized considering conditions across Berkeley, Jefferson, and Morgan counties.
- The group classified rapid population and economic growth driven by people and businesses moving into the region as an external threat rather than an internal weakness, because the growth was not occurring organically within the existing population and economy.
- Participants identified employer downsizing caused by external market forces as a threat because companies could reduce existing workforces quickly when demand for products such as Procter & Gamble goods declined. They also discussed inadequate maintenance by PennDOT District 8 as a potential local infrastructure weakness.
- The discussion identified rising demand for cloud technologies as an international external threat that could create either positive or negative regional impacts depending on how it was managed.

Infrastructure and Workforce

- Infrastructure objectives covered transportation, industrial site selection, broadband and other communication networks, water, sewer, natural gas, and natural resources. Workforce objectives included expanding workforce development, supporting small businesses and local employment access, and strengthening the region's presence in the education sector, including through Blue Ridge Technical College.
- A shortage of qualified workers was identified as a regional weakness, reflecting difficulty attracting an adequately qualified workforce.
- Population growth was discussed as an external condition that was contributing to challenges in attracting and retaining employees. After discussion, the group classified the resulting workforce challenge as an internal weakness rather than placing population growth itself in the threat category.

- The region continued to face difficulty attracting and retaining a qualified workforce. Participants linked the challenge to an aging population, limited youth retention, and competition from employers in nearby Virginia and Pennsylvania, where relatively small wage increases had led workers to change employers.
- Participants identified the limited presence of corporate headquarters, highly technical positions requiring certifications or degrees, and higher-paying financial-services and insurance jobs as workforce and economic weaknesses. They noted that technically trained residents had historically left the region for better-paying opportunities near the Beltway, although the availability of such jobs was improving.
- Participants identified weaknesses extending from parks and recreation to broader infrastructure, including utilities, and raised the unresolved question of how communities could fund infrastructure improvements when demand exceeded available resources.
- The discussion identified limited maintenance staffing as a constraint on local infrastructure and parks operations. One example involved approximately two maintenance employees covering 20 parks across an entire county, leaving the workforce spread thin and limiting the ability to maintain existing assets.

Regional Competitiveness

- Region 9's competitive landscape included Northern Virginia, the Hagerstown and Frederick areas, South Central Pennsylvania and Franklin County, and the Winchester area. The discussion emphasized monitoring what competing regions do well, assessing the region's market position, and maintaining its competitive edge.
- Participants discussed the region's economic activity reaching a critical mass that supported the broader economy through people buying, working, and spending locally.
- Participants identified the region's proximity to metropolitan areas and its relative affordability as strengths that supported its appeal, while noting that affordability was comparative.
- The region's location expanded access to a broader labor pool but also increased competition among employers for the same workers, creating both a workforce advantage and a regional hiring challenge.
- Participants discussed that the region had a diversified industry base, but much of the employment appeared concentrated in lower-wage service-sector and line-worker positions. Higher-wage executive, financial-services, insurance, and healthcare roles were more limited, and some executives who worked in the region were believed to live elsewhere and spend their income outside the region.
- The discussion identified the limited presence of corporate headquarters as a weakness. Although healthcare and social-assistance employment was substantial, major institutional headquarters such as WVU's healthcare system were located outside the region, in Morgantown, which limited the local concentration of senior and higher-paying positions.
- Participants discussed that affordable, accessible technical education could help residents enter the workforce with less debt, but career progression remained a

concern. A Penn Tech graduate working in project management was cited as an example of someone who had achieved home ownership and relatively low debt, while the discussion noted that trained workers still needed opportunities to increase earnings and prepare for retirement as inflation affected their finances.

- The region's proximity to surrounding employment centers was described as providing residents with an advantage: graduates could pursue higher-paying work elsewhere while continuing to live in West Virginia and potentially return home. This location also supported workforce participation and regional affordability, although career advancement could eventually require continued skill-building or movement into new opportunities.
- The region's location near Virginia and other employment centers had been viewed as both a strength and a weakness: it enabled people to live in West Virginia while working elsewhere, but residents could also obtain healthcare, banking, groceries, vehicles, and other services across the border, causing income and spending to leave the region.
- Participants identified a perception that products and services across the border were higher quality or better priced, including healthcare and retail purchases. This perception was described as a marketing and regional-branding challenge because some residents did not recognize comparable offerings within the region.
- Participants noted that businesses and communities competed across a larger regional market rather than only within their immediate locality. Examples included automobile dealerships serving customers along Interstate 81 and residents using online shopping to compare prices and purchase from providers outside the area.
- A major threat was identified in competition from Maryland and Virginia, which could offer substantially larger financial incentives and fund project-related improvements that the region could not match. It was noted that the region sometimes won projects because companies valued nonfinancial factors and were already favorably disposed toward West Virginia, but losing projects to neighboring states remained a significant risk.
- The group discussed how differences in regulation between Berkeley and Jefferson counties could influence business location decisions. Businesses might favor areas with fewer regulations because they required less time and investment to become operational, but this could shift growth and resources from one county to another and create uneven regional development.

Emergency Preparedness

- A senior living center in Morgan County was identified as a regional asset and a potential emergency evacuation center for the public school system, creating an opportunity to support local emergency-management capacity.

Quality of Life

- Parks and recreation were identified as a regional strength extending beyond Berkeley County, with Morgan County's state-park resources and the counties' complementary parks and recreation amenities contributing to the region's appeal.

- Participants identified activities that attracted people from outside the community while continuing to engage local residents, linking those activities to a balance between work, recreation, and broader community participation.
- Participants identified that communities in Region 9 were taking proactive steps on quality-of-life initiatives and building capacity to address infrastructure needs, rather than operating without a strategy.
- Access to Valley Health and other healthcare services was discussed as a quality-of-life strength that could influence whether people chose to live and work in the region.
- Participants noted that attracting executive and professional employees required more than showcasing desirable neighborhoods. Prospective residents also evaluated the broader package of community services, including school systems and other quality-of-life factors.

Transportation Infrastructure

- EPTA has made substantial progress after facing challenges in the past, and that a new facility was expected the following year, with the longer-term goal of creating a facility that the community could enjoy.
- The region's site-selection assets included Class I railroads such as CSX and Norfolk Southern, the Front Royal inland port in Northern Virginia, CSX's intermodal facility in Chambersburg, Norfolk Southern's facility in Greencastle, and rail yards in the Harrisburg area. These facilities supported freight movement and large-scale warehousing activity.
- The airport was identified as an additional site-selection and logistics asset.
- The discussion identified Morgan County's new U.S. 522 bypass as an infrastructure improvement, while noting that traffic on the route had continued to increase because it provided a direct connection into Virginia.
- The region's proximity to competing markets and the investment required for airport-related development were viewed as challenges because the associated benefit-cost analysis might not support additional airport investment.
- The interchange near the Buc-ee's location on I-95 and Florence was described as severely congested and undersized, with traffic conditions reportedly making the area function like a parking lot.
- Participants discussed the financial difficulty of maintaining public transportation assets. Transit organizations needed to consider an asset's full life cycle and the cost of building and maintaining infrastructure, because replacing or operating buses and other assets could be infeasible without adequate funding.

Regional Collaboration

- An example of cross-county coordination involved Jefferson County's aging organization working with APDA on transportation services, illustrating how regional partnerships could help organizations work more effectively together.
- The Economic Development Council was identified as a regional strength and opportunity because its recognized members could help develop new opportunities and connect the region with government officials and other community stakeholders.

Education and Workforce

- The region had made significant investments in its public school system, with continued enrollment growth, new schools, and expansion from 3A to 4A classifications. Residents also had access to community colleges, universities, nearby institutions outside the region, two-year and four-year degrees, and job-training certificates.
- The discussion emphasized integrating education with workforce needs. Local businesses and community agencies were described as potential partners in creating educational opportunities that aligned with employer and community requirements.
- Childcare was identified as a regional weakness, particularly for children from birth through elementary-school age. Participants noted a lack of nationally recognized providers such as KinderCare, said that establishing sufficient childcare capacity could take several years, and highlighted additional coverage challenges for workers with shift schedules.
- Participants discussed creating stronger incentives for graduates to remain in West Virginia, potentially by offering degree-specific support in exchange for several years of in-state service. The Promise Scholarship was viewed as a statewide strength, but participants said it did not cover enough of the cost of attendance; they also noted that West Virginia University tuition was approximately $30,000 and that no additional free in-state tuition option or comparable discount had been identified.
- West Virginia Invest was designed primarily for two-year community-college and technical programs rather than four-year professional degrees such as engineering or medicine. The program provided last-dollar financial assistance, meaning students first completed the financial-aid process and qualified for other aid before West Virginia Invest covered remaining costs; unlike the Promise Scholarship, it did not depend on specific test scores and was intended to avoid denying eligible students assistance.
- The discussion identified the region's high workforce-participation rate as a strength, with participation reportedly exceeding both other areas of West Virginia and the national average. The region also had higher-than-average percentages of high-school and college graduates compared with the rest of the state.
- The college had access to grant opportunities within the West Virginia higher-education system that could support the development of new educational programs or enhance existing programs.

Community Engagement

- The discussion identified volunteer participation as a source of community capacity, with residents contributing time despite busy schedules to help local initiatives get work done and strengthen community pride and engagement.
- The discussion identified a communication and expectations gap in the county: many residents did not understand how local infrastructure and public services worked, while maintaining high expectations for what those systems should provide.
- Participants identified coordination of family and community events as an opportunity to improve attendance, sponsorship, event size, and quality. They noted that organizations sometimes scheduled events such as June Jubilee on the same day,

causing them to compete for sponsors and participants instead of combining resources through a more coordinated regional calendar.

Environmental Infrastructure

- Green infrastructure and related regional efforts were discussed across the three-county area, including examples in Ranson, Jefferson County, Martinsburg and Berkeley County, and Morgan County. Watershed organizations were also identified as contributing to region-wide efforts.

Childcare

- Childcare discussions highlighted that children around two years old or younger could not care for themselves, leaving working parents dependent on available care. Participants noted that grandparents sometimes became de facto parents when no other childcare option was available, adding to the workforce and family-support challenges already identified.

Capital Planning

- Participants raised the lack of dedicated funding for ongoing capital maintenance as a regional weakness. Grant programs could fund new or upgraded facilities, but communities still needed long-term capital plans to cover operations and maintenance costs 20 to 30 years after construction.
- Participants discussed evaluating the value of public services and infrastructure through benefit-cost analysis, particularly when considering whether to invest in or expand assets such as airport facilities.
- Participants noted that the college's dependence on state funding and grants created a sustainability weakness. Grants could purchase equipment, but they did not necessarily provide funding for ongoing software, equipment maintenance, or other operating costs.

Public Finance

- The group began discussing how state taxation policies and the revenue-generating authority granted to counties and municipalities affected communities' ability to fund capital improvements and maintain public assets.
- Participants discussed that available public funding was limited relative to the breadth of services and infrastructure responsibilities communities were expected to provide. They noted that it was a misconception to assume project construction funding alone covered the long-term costs of operating and maintaining public assets.
- The discussion noted that much of the value generated in the region flowed to Charleston and other parts of the state: for every dollar sent out, approximately 75 cents was spent elsewhere, leaving the region with only about 25 cents in returned value.
- The group discussed that the college faced challenges similar to other state facilities and agencies because funding decisions were driven at the state level, raising concern about how long the region could continue operating without a more sustainable funding structure.

Regional Marketing

- Participants discussed developing a marketing campaign to counter the perception that the region was primarily attracting older residents and offered limited opportunities for younger people. They noted that New Jersey homebuyers could obtain more value for their money locally, but this affordability advantage needed to be paired with clearer messaging about the region's opportunities for younger residents and families.

Tourism and Regional Branding

- The Regional Ambassadors initiative, developed through the tourism certificate program, had produced a 6-minute-45-second video showcasing the three-county region through food, history, and recreational activities. The project involved visiting each county, gathering footage, and developing a script, and participants discussed expanding or repurposing the material for broader regional promotion.
- The discussion identified an opportunity to develop regional recreational-tourism itineraries spanning Berkeley, Jefferson, and Morgan counties and nearby states, including West Virginia, Pennsylvania, Virginia, and Maryland.

Community Communication

- Participants identified a need to strengthen communication about community activities and services so that people moving into the region could more easily learn what was available locally.
- Limited communication outlets were identified as both a regional weakness and an opportunity to strengthen the marketing campaign by improving how information about local activities and services reached residents and newcomers.

Parks and Recreation

- Participants discussed leveraging statewide professional organizations, such as a potential West Virginia Recreation and Parks Society, to bring additional involvement, influence, and activities back to the region through parks and recreation networks.
- Participants identified new and expanding sports facilities as quality-of-life and economic-development assets, including the planned Inwood facility, the YMCA, and the upcoming expansion and renovation of the Saddle gym. They said these amenities could attract residents from other communities, increase tax revenue, and support youth attraction and retention by providing more places for recreation and fitness.

Riverfront Development

- Participants identified private riverfront recreation, retail, and dining as opportunities for the region. It was noted that comparable rivers in other states often combined public access on one side with private development on the other, suggesting that the region could use its riverfront to create additional economic activity and public access.

Economic Development

- Procter & Gamble selected the region after the County Development Authority and the regional organization partnered to purchase several farms near the proposed site. The acquisition created a roughly 600-acre tract that met the company's size requirements, and the discovery of nearby rail service resolved another site-selection concern. The evaluation also included the region's workforce-participation rate, which needed to be

assessed at the local level rather than across a broader area containing places with different employment conditions.

- The region's ability to attract investment depended on more than financial incentives. Site acreage, rail access, and other location benefits helped demonstrate that the investment would be strategically valuable to companies.

Public Services

- Participants identified limited statewide capacity to provide essential services as a regional threat, particularly because state-delivered services had not kept pace with the region's population and economic growth.
- The discussion connected continued business and population growth in the Charleston and broader West Virginia area with increased demand for public services and infrastructure. Participants noted that growth could bring new businesses and residents while also increasing pressure on already limited service capacity.

Economic Development, Commerce, and Workforce Development

SWOT Meeting #3 – Thursday, September 3, 2026.
9:00 – 11:00 AM | Martinsburg, WV

Participants:

- Leslie Gantt, Berkeley County Development Authority
- Jennifer O'Brien, Region 9

Facilitator: Troy D. Truax, AICP, Michael Baker International, Inc.

Meeting Materials:

- Agenda
- PowerPoint Presentation
- SWOT Worksheet

Only Leslie Gantt of the Berkeley County Development Authority attended the meeting with Jennifer O'Brien and Troy Truax. To broaden participation while making efficient use of Ms. Gantt's time, Troy and Jennifer asked her to have the full BCDA team complete the SWOT analysis and return its responses as soon as practicable.

Because attendance at the meeting was limited, Region 9 subsequently administered an online survey to obtain broader stakeholder participation in the SWOT analysis.

Tourism and Small Business

SWOT Meeting #4 – Thursday, September 3, 2026.
1:30 – 3:30 PM | Martinsburg, WV

Participants:

- Robby Blair, Main Street Martinsburg
- Madison Gaynor, Main Street Martinsburg
- Liz Cook, Main Street Charles Town
- Kristie Hadly, Martinsburg-Berkeley County Chamber of Commerce
- Dusty Martin, Morgan County CVB/Travel Berkeley Springs
- Jeff Johnson, Summit Point Raceway
- Jennifer O'Brien, Region 9

Facilitator: Troy D. Truax, AICP, Michael Baker International, Inc.

Meeting Materials:

- Agenda
- PowerPoint Presentation
- SWOT Worksheet

Key Discussion Themes

- **Regional growth and competitiveness:** Participants recognized the Eastern Panhandle as a fast-growing and economically important region, but noted that state-level investment has not kept pace with the region's contribution to West Virginia's economy.
- **Tourism and downtown vitality:** The region's tourism assets, historic downtowns, outdoor recreation, wellness economy, motorsports, and proximity to major metropolitan markets were identified as major strengths.
- **Infrastructure constraints:** Water, sewer, roadway capacity, broadband, cellular service, and business-ready sites were repeatedly described as limiting factors for future investment and business retention.
- **Workforce challenges:** Participants emphasized shortages in hospitality, customer service, retail, restaurant, and tourism-related labor, as well as wage competitiveness issues compared with nearby states.
- **Quality of life investments:** New or proposed investments in recreation, trails, childcare, youth services, health care, and downtown amenities were viewed as important for retaining residents and attracting workers.
- **Economic resilience:** The discussion connected regional resilience to hazards, federal spending uncertainty, infrastructure reliability, housing affordability, and the ability of local businesses to withstand economic disruption.

SWOT Highlights

Strengths

- Strong tourism base supported by outdoor recreation, wellness assets, historic downtowns, motorsports, and proximity to major East Coast markets.
- Strategic location near Washington, D.C., Northern Virginia, Maryland, Pennsylvania, and other regional population centers.
- Diverse transportation assets, including I-81, Route 9, MARC rail service, freight access, and the regional airport.
- Ongoing public and private investment in quality of life assets, including the YMCA, Boys and Girls Club expansion, sports facilities, greenways, and private recreation destinations.
- Expanding health care investment, particularly WVU Medicine's presence in Berkeley and Jefferson Counties.
- Educational and workforce assets, including Shepherd University, Blue Ridge Community and Technical College, James Rumsey Technical Institute, and Berkeley County Schools programs.
- Existing federal facilities and mission-ready assets that support public safety, emergency management, technology, training, and related employment sectors.

Weaknesses

- Insufficient public water, sewer, roadway, broadband, and cellular infrastructure to support growth and business expansion.
- Limited availability of fully serviced, business-ready sites for industrial, technology, and mission-support users.
- Shortage of hospitality, tourism, restaurant, retail, and customer service workers.
- Wage competitiveness challenges, especially compared with nearby Maryland, Virginia, and Washington, D.C. markets.
- Vacant or underused downtown buildings, including properties held by investors without near-term reinvestment or rehabilitation.
- High barriers to using historic preservation and redevelopment incentives for smaller downtown properties.
- Limited local economic development tools and resources compared with neighboring states.
- Gaps in mental health, substance abuse, homelessness, and emergency service resources.
- Statewide stigma associated with West Virginia that may discourage outside investment or tourism interest.

Opportunities

- Advance infrastructure-led development through coordinated regional investment in water, sewer, transportation, broadband, logistics, and utility capacity.
- Expand non-motorized trail networks and regional trail connectivity, including links among downtowns, parks, the C&O Canal, the Route 9 trail, the Western Maryland Rail Trail, and outdoor recreation destinations.

- Capitalize on growing interest in authentic downtown experiences, walkable places, local businesses, and heritage tourism.
- Use downtown-first strategies to direct investment toward historic centers and support small business growth.
- Expand childcare and early learning capacity through Berkeley County Schools, the YMCA, and related community partnerships.
- Support youth and workforce development through STEMforce, Code Force, technical education, workforce training, and entrepreneurship resources.
- Leverage Ascend West Virginia and other talent attraction programs to bring new residents and remote workers to the region.
- Strengthen public-private partnerships that combine private investment with public infrastructure, grants, and community development resources.

Threats

- Housing affordability pressures, rising rents, childcare costs, and overall cost-of-living increases that could undermine workforce attraction and retention.
- Water supply limitations, particularly where growth, tourism, manufacturing, and data center development may increase demand.
- Potential electricity capacity and rate impacts associated with large-scale data center development.
- Federal funding reductions or shutdowns that could affect EDA, CDBG, public-sector employment, commuter patterns, housing assistance, and local economic activity.
- Traffic pattern changes from bypass projects that may reduce pass-through visitation to downtown areas such as Berkeley Springs.
- Cultural tension between long-time residents and new residents moving to the region for affordability and quality of life.
- Fragmented state, regional, and local strategies that may limit coordinated economic development, infrastructure investment, workforce development, tourism, and federal recruitment.
- Competition from neighboring states with stronger grant programs, incentive tools, infrastructure capacity, and economic development resources.

Detailed Discussion Summary

Tourism and Recreation

- Participants identified tourism-related strengths in Morgan and Jefferson counties, including outdoor recreation, parks, wellness, spas, and Berkeley Springs. Berkeley Springs included several independently operated spas and the Berkeley Springs state park, described as the only state-run spa of its kind in the nation.
- Participants said the region's downtowns offered a broad range of services, restaurants, and other activities, giving residents and visitors multiple reasons to spend time there.
- Participants identified several quality-of-life investments as strengths that could support population growth and tourism by making the region a more attractive place to live. These included the new YMCA near the hospital, WVU Medicine's financial commitment

and planned childcare services at the site, the Boys and Girls Club's capital campaign to double its facility capacity, the new Sportsplex near Exit 8, and the planned expansion connecting the existing 1.5-mile Frog Hollow Trail to the Martinsburg Greenway.

- Participants clarified that most of the highlighted quality-of-life projects were still planned or under development rather than already completed. The existing assets were the 1.5-mile Frog Hollow Trail and the current Boys and Girls Club facility, while the YMCA, Sportsplex, trail expansion, and Boys and Girls Club expansion represented forthcoming improvements.
- Participants discussed expanding and interconnecting non-motorized trails across the region, including the Route 9 trail connection to Shepherdstown, Charles Town, and Martinsburg, potential extensions toward Charles Town, water trails in Morgan and Jefferson counties, and the Western Maryland Rail Trail. They said stronger connections could link local communities with the C&O Canal and other major regional recreation assets.
- Participants said the region's outdoor-recreation network could support both tourism and local quality of life by connecting communities such as Berkeley Springs, Charles Town, Shepherdstown, Harpers Ferry, and Paw Paw. He cited the C&O Canal's status as the country's most visited national historic park and noted that Harpers Ferry received approximately 30,000 visitors during peak periods, underscoring the potential value of better trail connections.
- Participants discussed extending the regional non-motorized trail network from Cacapon Resort State Park through Berkeley Springs and potentially onward to Hancock, where another trail was under development between Berkeley Springs and Hancock. They also noted a study to rebuild the Hancock bridge and the opportunity to connect pedestrians to the C&O Canal trailhead, reinforcing Hancock's potential role as a major trail hub linked to the Tuscarora Trail, Appalachian Trail, and other regional routes.
- Participants discussed Paw Paw's potential to benefit from regional trail and amenity development. They described the town as experiencing a significant resurgence and occupying a strategically important location, while noting that public investment and additional work were still needed to establish the related amenities.
- Participants noted that the bypass could also create new tourism opportunities by making communities more accessible to travelers who currently avoided stopping because of truck congestion. They discussed the possibility that visitors traveling along U.S. 522 to destinations such as James Madison University, William & Mary, Pittsburgh, and beach destinations could become intentional visitors if Berkeley Springs and neighboring communities marketed themselves as destinations rather than relying on pass-through traffic.

Transportation Infrastructure

- The region was described as having diversified transportation options for personal travel and freight, with the airport's expanding capabilities identified as an opportunity for attracting employers. Access through Interstate 81 and marketing were also cited as regional strengths.

- Participants observed a direct connection between federal shutdowns or reductions affecting government departments and local economic activity around the Martinsburg train station. Parking demand dropped during shutdown-related periods, while post-COVID in-office work requirements led more people to use the train for commuting.
- Participants discussed how bypass projects could produce both benefits and risks for Berkeley Springs, Harpers Ferry, and other communities. A bypass could remove truck traffic and reduce congestion, but it could also divert approximately 39,000 vehicles per week away from downtown Berkeley Springs, potentially reducing unplanned visits and business activity. More than 50% of first-time visitors to the Berkeley Springs Visitor Center reportedly said they had previously driven through the community without stopping, highlighting the uncertainty about how the traffic shift would affect tourism and local businesses.
- Participants identified the approximately two-year timeframe before the bypass was expected to open and said the community had not yet determined how to address the resulting change in traffic patterns. They emphasized that businesses were concerned about the unknown effect on automobile traffic and wanted to retain visitors while supporting the removal of heavy truck traffic from downtown areas.

Healthcare Services

- Valley Health was described as an established healthcare presence across Berkeley, Jefferson, and Morgan counties, with hospitals specifically serving Morgan County. WVU Medicine was reported to be investing several hundred million dollars in Berkeley and Jefferson counties, including an infusion center and other expanded services.
- Participants identified limited mental-health resources as a weakness in the region. They connected the shortage with substance-use challenges, homelessness, and inadequate workforce resources for affected individuals.

Workforce Development

- The region was identified as having an experienced workforce that included veterans and professionals across cybersecurity, technology, emergency management, security, tourism, and other disciplines. Participants said this workforce supported employers in the region and in other states while benefiting from the area's quality of life.
- Participants identified the tourism workforce as a weakness rather than a strength because the available workforce was not sufficiently developed for hospitality jobs, creating difficulty filling tourism positions despite available employment opportunities.
- Blue Ridge Community and Technical College was identified as a major regional institution and a significant workforce-development resource. Participants noted that it ranked third statewide by enrollment and provided training for workers.
- Participants identified collaboration among organizations as a regional strength because it helped bring resources to youth and support the future workforce.
- Participants identified limited job competitiveness and relatively low wages—particularly among public-sector and teaching positions—as a regional weakness, making it harder to compete with neighboring states for workers and businesses.
- Participants identified a severe shortage of skilled workers for customer-service industries, including restaurants and retail. In Morgan County, visitors often could not

obtain spa, kayaking, or dinner reservations on weekends, while many businesses closed Tuesday through Thursday because they lacked enough staff to operate seven days a week. The group said the economic effect of having businesses closed for those three days had not been quantified.

- Participants said the region was losing young people, students, and young professionals to other areas, while the available youth workforce often lacked the skills needed by local employers. They identified the aging population and limited availability of high school and college workers as factors worsening staffing problems in restaurants, retail, and other customer-service businesses.
- The discussion raised questions about whether the region's economic diversity translated into sufficient wages. Participants observed that industries with strong location quotients appeared to be concentrated in entry-level and middle-income employment, while higher-paid professional occupations seemed to have weaker location quotients. They said additional analysis would be needed to identify where life-sustaining and competitive wages originated.
- Dusty reported that a regression analysis of national, state, and regional data showed that a majority of hospitality wages in Morgan County started below $13.75, approximately 30% below the national average and 20% below the Hagerstown average. He said the county would need to raise average hospitality pay to at least $17 to compete with Frederick and Washington counties.
- Participants noted that 22% of Morgan County employees worked in hospitality, meaning low wages in that sector affected a substantial share of the local labor market. They also discussed the tension between raising wages to attract and retain workers and the risk that small businesses could be unable to afford higher pay and might close.
- The discussion linked the region's lower hospitality wages with reduced incentives to accept local service jobs. A participant compared a college student's reported earnings of approximately $30–$40 per hour as an umpire with the $7-per-hour wage from a previous grocery-store job, illustrating the difficulty of attracting workers to low-paying positions.
- Participants described Ascend West Virginia as a workforce program that encouraged people from other states to relocate to West Virginia with a $1,000 incentive. Ascend had also supported downtown revitalization, including a new panhandle headquarters and coworking space.

Regional Investment

- Participants discussed ongoing investment in both tourism and manufacturing as a regional strength. Tourism investment was described as coming primarily from private-sector markets that also supplied visitors, while manufacturing had seen major announcements in Berkeley County and included both public and private investment, including state funding.
- The YMCA, Boys and Girls Club expansion, Martinsburg Greenway expansion, and Sportsplex were described as projects with committed public funding or contributions. Specific sources included city investments in the YMCA and Boys and Girls Club capital

campaign, a federal grant for the Greenway, and a tax increment financing district for the Sportsplex.

- Participants noted that private facilities and private investment also contributed to regional quality of place, citing River Riders in Jefferson County as an example and observing that multiple private projects had been invested in during the preceding three years.
- Participants clarified that regional quality-of-life investments reflected a public-private partnership model. Public contributions supported projects such as the Boys and Girls Club, YMCA, Sportsplex, and Martinsburg Greenway expansion, while private ventures included River Riders and Summit Point's investment in its own facility.
- Participants said state investment priorities remained focused on sewer, water, and coal-field needs in rural areas rather than adequately recognizing the region's growth. They noted that approximately 75 cents of every dollar sent back to the state was invested in other regions, leaving the area at a disadvantage in the Eastern Panhandle.

Education and Training

- Participants discussed the region's post-secondary and technical education options, including Shepherd University, Blue Ridge Community and Technical College, and James Rumsey Technical Institute. Blue Ridge was described as offering two-year programs such as nursing, and a newly opened beauty school was noted as providing a pathway to technology-related training and licensure.
- A privately operated beauty school in downtown Martinsburg closed after changes affecting its access to federal aid, and Berkeley County Schools subsequently acquired and renovated the facility. The school reopened downtown under Berkeley County Schools' operation, providing a local cosmetology training option.
- Participants said Berkeley County Schools had begun early-learning centers for pre-K children, including three-year-olds, and that the program could both support children's education and expand parents' ability to participate in the workforce. The forthcoming YMCA and Boys and Girls Club expansion were discussed as additional childcare and youth-development resources, while participants noted that childcare remained inadequate for shift workers and that 24-hour coverage was difficult to find.
- Participants described STEMforce and CodeForce as downtown programming that provided STEM- and coding-related opportunities, with potential for regional expansion. Their nonprofit also funded scholarships for children who could not otherwise afford the programs.

Downtown Development

- Participants said automotive businesses such as mechanic shops could be appropriate in general commercial areas but were not always compatible with historic downtown districts such as downtown Charles Town, where they could be located next to residences and conflict with the goal of attracting businesses where people spend money.
- Dusty identified vacancies in downtown buildings across areas including Morgan County and Martinsburg as both a weakness and an opportunity. He said the more significant problem was that large corporations and property investors purchased buildings, made

minimal improvements, and held them until surrounding property values and the economy increased, limiting opportunities for smaller investors who wanted to redevelop the properties.

- Participants noted that some historic-district buildings had been purchased inexpensively, received minimal improvements, and later been listed at prices that did not reflect their actual condition. Dusty gave the example of a building purchased for approximately $900,000 that could require about $4 million in rehabilitation, creating a mismatch between acquisition cost, redevelopment needs, and the owner's expectation of recovering the purchase price.
- Participants said some downtown and historic-district properties in Berkeley and Berkeley Springs had been listed for more than $1.2 million despite having only a few operating groups, whereas similar properties had previously sold for about $360,000. They attributed the pricing gap to owners and investors holding properties with limited improvements while waiting for market growth, which reduced opportunities for local entrepreneurs and quality business development.
- Participants said residents and visitors were increasingly favoring downtown areas and attractive, walkable places over malls and large shopping centers because they wanted a broader social and experiential destination. This shift supported Charles Town's downtown-first focus.

Zoning and Land Use

- Participants discussed how insufficient zoning restrictions could prevent desired tourism, downtown-development, housing, and investment opportunities from emerging. The zoning rewrite was identified as a potential way to address land-use conflicts, including whether automotive shops should be permitted in downtown areas.
- Participants discussed local enforcement as a potential way to address neglected historic-district properties. They noted that some municipalities required owners to keep properties on the market or make investments, and said enforcement would be a city responsibility rather than a Main Street program or business-organization function. Participants connected neglected properties with effects on surrounding property values and quality of life.
- Participants discussed the need to balance zoning consistency with economic-development flexibility. They said businesses could choose jurisdictions with fewer barriers when zoning decisions took 60 to 90 days, while overly rigid zoning could also cause opportunities to move elsewhere. Public and private stakeholders were therefore seen as needing to find land-use solutions that were safe, consistent with regional plans, and responsive to market timing.

Small Business Support

- The new state Office of Entrepreneurship was described as a resource for small businesses because it could provide support and help reduce the rental assistance burden involved in starting a business.
- Participants said organizations supporting small businesses faced a shortage of economic-development tools compared with neighboring states. Virginia communities were described as receiving grants, technical assistance, and training resources—

including approximately $80,000 for a sculpture trail—while the region's state Main Street program had a smaller budget and limited access to training dollars.
- Participants highlighted how historic tax-credit programs and the Tourism Investment Act could reduce the cost of reinvesting in West Virginia properties, but their eligibility thresholds created a high barrier for smaller historic buildings. In particular, a minimum $1 million investment could prevent buyers of one- or two-story historic buildings from using the programs even when the properties could support local economic activity.

Defense and Technology Investment

- Summit Point was described as having mission-ready assets—including available land, facilities, transportation access, secure environments, aviation resources from the airport, and specialized venues—that could support public training, testing, research, and operations. These assets had helped attract technology-related companies connected to the National Defense Industrial Base and bring investment and jobs to the region.

Federal Facilities

- Existing federal facilities were identified as a regional strength, including an advanced training center in Harpers Ferry and federal infrastructure that had secured long-term office space.

Public Safety and Economic Impact

- Participants identified the region's public-safety mission and related services as a strength because federal and emergency-service activities generated second- and third-order economic effects through housing, logistics, employment, and tax revenue that supported surrounding communities.
- Participants said emergency-services funding was insufficient for tourism-related demand. Tourism and outdoor recreation generated substantial service calls, including incidents involving injured hikers, and in some areas tourism-related calls reportedly exceeded calls involving local residents. The group noted that this challenge was common in counties with significant recreational activity.
- Participants said data-center property-tax revenue could reach tens of millions of dollars annually in comparable Pennsylvania jurisdictions, but they also raised concerns that local governments would face increased competition for police officers and other workers without receiving equivalent revenue to support those services. They cited a Pennsylvania data center occupying approximately 700 acres as an example of the scale of potential investment and tax generation.

Historic Preservation

- Participants noted that historic preservation transactions required more specialized knowledge than conventional real estate transactions, and that many recent buyers in the region lacked experience with historic reinvestment and had not yet learned to leverage historic tax credits. He noted that sophisticated developers had successfully used the credits in projects in Charles Town and Martinsburg, but said federal and state policy thresholds needed to be lowered or otherwise revised to make the programs more accessible.

Infrastructure

- Participants identified insufficient public water and sewer infrastructure and a shortage of fully serviced, business-ready sites as barriers to economic development. Jeff said an investment opportunity had left the region for Virginia about 10 years earlier because the needed infrastructure was not provided, despite state officials advocating for it. The group said infrastructure gaps could prevent small, mid-sized, and large companies from locating in the region.
- Participants said planned and emerging government-contracting and technology developments in Berkeley and Jefferson counties could generate hundreds of jobs, increase wages and demand, and support downtown reinvestment. They also said narrow roads and limited Interstate 81 capacity could constrain manufacturing and e-commerce supply chains, logistics, tourism access, and the movement of workers to downtown areas.
- Participants said the region's infrastructure was not keeping pace with growth. Public roads, water, sewer, broadband, and cellular coverage remained inadequate in parts of the county, while neighboring Virginia and Maryland offered stronger connectivity. During an event that attracted approximately 50,000 spectators, two wells ran dry and water tanks had to be brought in, illustrating the infrastructure and reputational risks associated with accommodating major tourism and business activity.
- Jeff proposed infrastructure-led development across Berkeley, Jefferson, and Morgan counties, coordinating water, sewer, high-capacity broadband, logistics, and other foundational assets through a regional plan. He said this infrastructure could support job growth across sectors, help raise wages above the region's low-wage baseline, and enable construction, hospitality, and small-business growth. The airport's recent expansion was cited as an example of infrastructure and development generating entrepreneurial activity, procurement, and additional jobs.
- Participants identified a gap between the region's proximity to high-quality outdoor recreation and the limited connectivity that allowed residents and visitors to reach it, comparing the situation to sidewalks that abruptly ended. They said the area had substantial outdoor assets but lacked the continuous, interconnected trail infrastructure needed to fully capitalize on them.
- Participants identified water limitations as a major threat because the regional economy depended heavily on outdoor recreation and communities such as Berkeley Springs were built around spring and water-based assets.
- Participants said new manufacturing and a planned data center in Berkeley County were increasing pressure on local water sources and could also worsen electricity costs. They identified the Valley Link high-voltage power line as another significant regional concern.

Federal Funding

- Participants said federal spending reductions could significantly affect the Eastern Panhandle, particularly through potential cuts to the Economic Development Administration and Community Development Block Grant funding. They noted that

losing first-time homebuyer loans and CDBG-supported affordable-housing subsidies could reduce affordability and make balanced regional growth more difficult.

Data Center Investment

- Participants discussed data centers as a potential source of increased public revenue but noted that the current distribution structure primarily benefited Berkeley County and the state rather than the municipalities hosting or affected by related activity. Berkeley County was expected to receive its share from two data centers, while municipalities would not receive a comparable direct benefit, even though many infrastructure and service impacts were local.
- Participants contrasted West Virginia's data-center revenue distribution with Pennsylvania's approach, where the county, school district, and municipality in the local taxing jurisdiction could all receive property-tax benefits. They said local governments in West Virginia would need to advocate in Charleston for a distribution model that recognized local costs and impacts.

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)

FIVE-YEAR UPDATE

SWOT ANALYSIS WORKSHOPS | AUGUST 31 AND SEPTEMBER 3, 2026

MARTINSBURG, WV

Agenda

- Welcome and Introductions
- CEDS Overview
- Region 9 CEDS (2023 – 2027)
- SWOT Analysis
- Next Steps

2023 – 2027

Comprehensive Economic Development Strategy (CEDS)

ANNUAL UPDATE 2025

For the
Eastern Panhandle Regional Planning and Development Council (Region 9)
Local Development District

Berkeley, Jefferson, and Morgan Counties
West Virginia

Region 9

CEDS Overview



A five-year strategy-driven economic plan to guide the growth of jobs, development, and commerce in Berkeley, Jefferson and Morgan County, West Virginia.



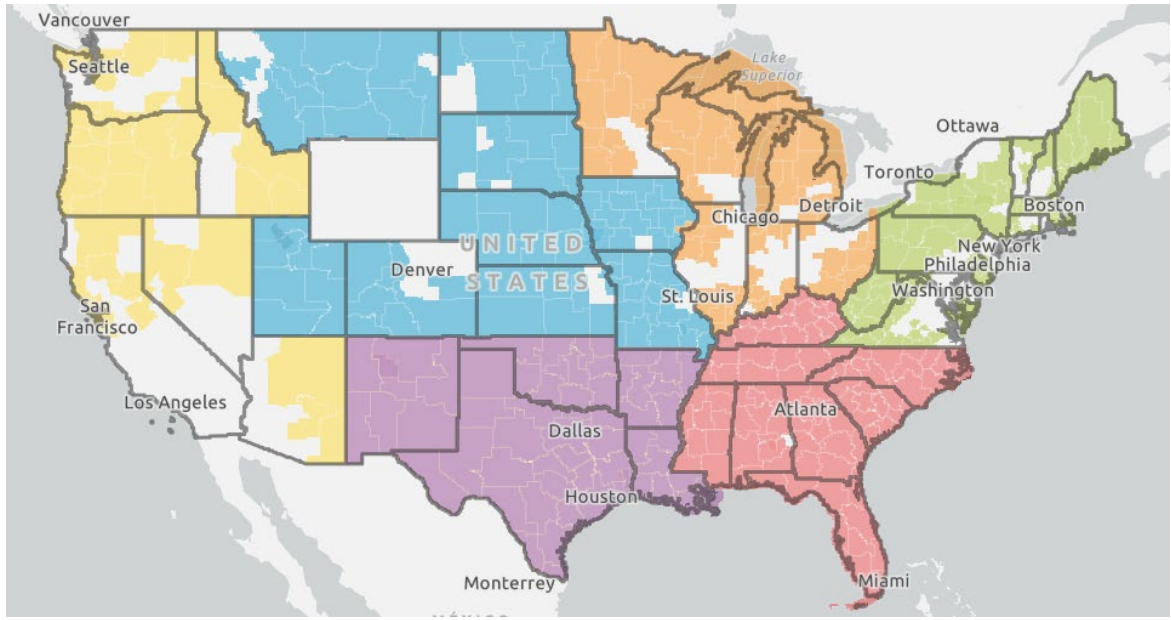
Regionally-owned planning process designed to build capacity and guide the economic prosperity and resiliency of an area or region.

Region 9

CEDS Overview

- CEDS is a prerequisite for designation by EDA as an Economic Development District (EDD).
- EDDs must update their CEDS at least every five years to qualify for EDA assistance under its Public Works and Economic Adjustment Assistance programs.
- EDDs act as a bridge between public, private, and non-profit sectors to encourage job growth and economic resilience
- An EDA-approved CEDS allows local communities to apply for federal grants, loans, and technical assistance.

Economic Development Districts



NADO Research Foundation

CEDS Overview

CEDS Content Requirements

Summary Background

- A baseline profile of the regional economy, detailing demographics, geographic factors, and regional distress criteria.

SWOT Analysis

- A clear assessment of regional Strengths, Weaknesses, Opportunities, and Threats.

Strategic Direction / Action Plan

- A roadmap outlining the regional vision, specific goals, measurable objectives, and prioritized investment strategies.

Evaluation Framework

- A defined set of performance measures to track successful plan implementation and regional impacts.

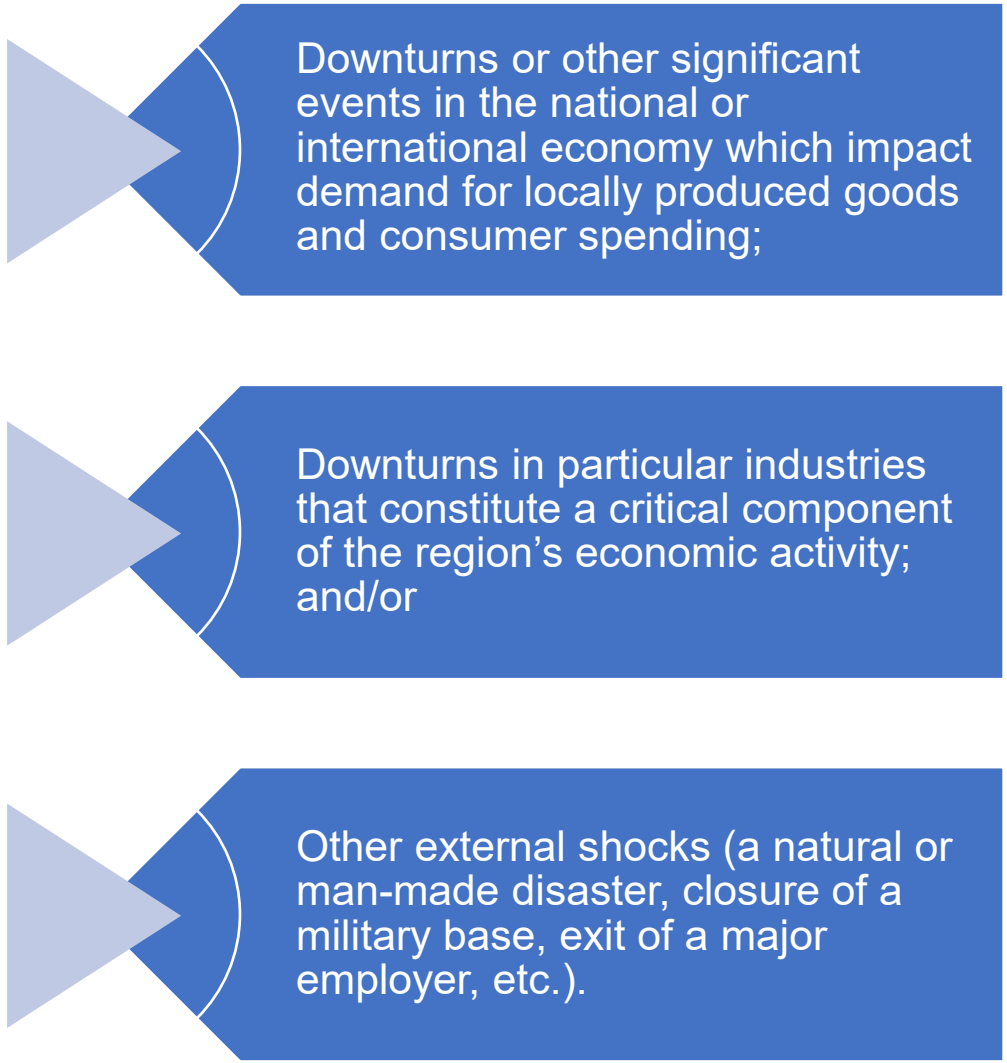
Economic Resilience

- A critical mechanism detailing how the region will prevent, withstand, and quickly recover from economic shocks or structural disruptions.

Region 9

CEDS Overview

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



Region 9 CEDS (2023 – 2027)

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

- Establishing networks
- Identifying regional economic challenges or deficiencies
- Monitoring and adapting to emerging trends (Economic, Technology, Environmental, Policy)
- Promoting a positive vision for the region

Economic Resiliency



Region 9 CEDS (2023 – 2027)

Key Themes Emerging from the 2022 SWOT Analysis

Key Theme One:

Infrastructure

Key Theme Two:

Education and Workforce Placement

Key Theme Three:

Quality of Life

Strengths	Weaknesses
✓ Low Cost of Living ✓ Quality of Place ✓ Primary Health Services ✓ Outdoor recreation	✓ Lack of sufficient infrastructure (water, broadband) ✓ Underperforming K-12 educational systems with lack of physical capacity to accommodate growing student population.
Opportunities	**Threats**
✓ Quality of life investments ✓ New perspectives to promote change for positive outcomes. ✓ Eastern WV Regional Airport (MRB) expansion	✓ Funding concerns for the MARC train ✓ Substance abuse

Region 9 CEDS (2023 – 2027)

Goal #1: Ensure adequate quantity and quality of infrastructure and resources.

- Objective 1.A. Support an integrated intermodal and resilient **transportation network**.
- Objective 1.B. Maintain adequate supply of readily **available sites** for manufacturing, technology, distribution and commercial activities for employer expansion or relocation.
- Objective 1.C. Improve **communication networks** including broadband internet, mobile service, and emergency communication.
- Objective 1.D. Improve, expand, and preserve new and existing **water/sewer/natural gas infrastructure**.
- Objective 1.E. Promote responsible stewardship of **natural resources** on land, water, and in our air to ensure resiliency,

Region 9 CEDS (2023 – 2027)

Goal #2: Continue to invest and expand upon education opportunities and foster a strong workforce.

- Objective 2.A. Expand **workforce** development initiatives.
- Objective 2.B. Support the expansion of regional **economic development resources** for small businesses and access to local employment.
- Objective 2.C. Create a presence within the **education** sector.

Region 9 CEDS (2023 – 2027)

Goal #3: Facilitate a high quality of life for the region's residents.

- Objective 3.A. Attract and retain area **youth**.
- Objective 3.B. Identify and promote **recreation** and leisure opportunities.
- Objective 3.C. Support general and **social needs** programs.
- Objective 3.D. Encourage greater **community involvement** and a regional **sense of pride**.

Region 9 CEDS (2023 – 2027)

Goal #4: Solidify the region's economic competitiveness with surrounding states.

- Objective 4.A. Nurture **communication networks** to support and promote the missions and objectives of local governments and their respective agencies.
- Objective 4.B. Examine and support regionalized solutions to ensure **competitiveness**.

Eastern Panhandle's Diversification

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.

TABLE 7: REGIONAL LOCATION QUOTIENT (YEAR 2023)

Jobs by Industry Type	Region 9		West Virginia		LQ
	Employment	% of Total	Employment	% of Total	
Agriculture, Forestry, Fishing and Hunting	301	0.67%	1,772	0.32%	2.09
Educational Services	971	2.18%	6,476	1.18%	1.84
Transportation and Warehousing	2,695	6.04%	18,234	3.32%	1.82
Information	1,073	2.41%	8,112	1.48%	1.63
Professional, Scientific, and Technical Services	3,239	7.26%	28,935	5.27%	1.38
Accommodation and Food Services	7,008	15.71%	62,739	11.43%	1.37
Arts, Entertainment, and Recreation	943	2.11%	8,906	1.62%	1.30
Manufacturing	4,549	10.20%	46,685	8.50%	1.20
Administrative and Support and Waste Management and Remediation Services	3,406	7.63%	35,298	6.43%	1.19
Retail Trade	6,780	15.20%	76,123	13.87%	1.10
Real Estate and Rental and Leasing	582	1.30%	6,627	1.21%	1.08
Wholesale Trade	1,652	3.70%	19,224	3.50%	1.06
Other Services (expect Public Administration)	1,427	3.20%	18,157	3.31%	0.97
Finance and Insurance	1,150	2.58%	17,896	3.26%	0.79
Construction	2,063	4.62%	33,075	6.03%	0.77
Health Care and Social Assistance	6,340	14.21	12,8192	23.35	0.61
Utilities	147	0.33%	5,238	0.95%	0.35
Management of Companies and Enterprises	260	0.58%	7,515	1.37%	0.43
Mining, Quarrying, and Oil and Gas Extraction	26	0.06%	19,720	3.59%	0.02

Source: U.S. Census Bureau, Quarterly Workforce Indicators.
2023 Employment: NAICS Sectors for Region 9 Counties & WV Statewide

Region 9

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.

CEDS (2023 – 2027) SWOT Worksheet

The following questions are intended to guide your preparation and participation in the Region 9 CEDS SWOT Workshops scheduled for Monday, August 31, 2026, and Thursday, September 3, 2026.

	Positives	Negatives
Internal Assets / Challenges • Cultural and natural resources • Economic resilience • Industry clusters • Infrastructure • Local and regional partners • Municipal assets (quality of life) • Parks and recreation resources • Technical and financial resources • Workforce (business needs, training)	**Strengths:** • 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? • What existing assets are most critical to attracting and retaining employers? • What recent economic development successes should be leveraged? • Which infrastructure investments provide the greatest competitive advantage?	**Weaknesses:** • 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? • What infrastructure deficiencies most constrain growth? • Where are the largest workforce skill gaps? • What barriers limit the development of housing, commercial, or industrial sites? • Which community assets are underutilized?
External Forces / Threats • Demographic shifts • Industry clusters • Local, national, or international events • National and global economies • Political shifts / dynamics • Regional competitors • State and federal funding sources • Unanticipated shocks (next pandemic)	**Opportunities:** • 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? • What emerging industries are best positioned for growth in Region 9? • What federal and state funding opportunities should be pursued? • How can remote work and technology create new economic opportunities? • What redevelopment or infill opportunities exist within existing communities?	**Threats:** • 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? • What economic sectors are most vulnerable to recession or technological disruption? • What risks are posed by housing affordability and workforce shortages? • How could federal spending reductions affect the regional economy? • What climate, hazard, or infrastructure risks threaten long-term economic resilience?

Next Steps

- CEDS Strategy Committee develop draft goals/strategies based on these SWOT sessions
- Region 9 staff prepare full draft of five-year (2027-2031) CEDS
- Draft CEDS out for 30-day public comment
- Approval of CEDS by Region 9 Full Council
- Submit to EDA

