

2023 – 2027

# Comprehensive Economic Development Strategy (CEDS)

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

*Berkeley, Jefferson, and Morgan Counties  
West Virginia*

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## REGION 9 is designated by:

The Appalachian Regional Commission (ARC) as a Local Development District (LDD).

The Economic Development Administration (EDA) as an Economic Development District (EDD).

The Federal Highway Administration and the State of West Virginia as the West Virginia Counterpart for

The Hagerstown/Eastern Panhandle Metropolitan Planning Organization (HEPMPO).

The State of West Virginia as a Planning and Development Council (PDC).

The Bureau of Census as an Affiliate Census Data Center, for statistical and applied research.

TABLE OF CONTENTS

Introduction and Vision ..... 3

Council Mission and Membership ..... 4

    Mission..... 4

    Membership..... 4

SWOT Analysis..... 7

Economic Resiliency..... 10

Strategic Direction / Action Plan..... 11

    Goals, Objectives, and Strategies..... 12

Evaluation Framework ..... 18

    Performance Measures..... 18

    Key Themes Indicators ..... 18

Technical Report ..... 19

    People of the Region..... 19

        Growth Trend 1: Population ..... 19

        Growth Trend 2: Changing Age Composition ..... 20

        Growth Trend 3: Educational Attainment..... 21

        Growth Trend 4: Median Income by Educational Attainment ..... 22

Economic Resilience..... 26

    Job Trends ..... 26

    Regional Competitiveness Effect ..... 29

    Location Quotient ..... 30

Regional Infrastructure ..... 32

    Business and Industrial Parks..... 33

    Airports ..... 38

    Ground Transportation ..... 39

    Drinking Water, Wastewater, and Stormwater ..... 42

    Communication Network..... 43

    Electric and Energy..... 44

    Solid Waste ..... 45

## Introduction and Vision

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



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

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

As background for the findings presented, this report includes:

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

In response to the COVID-19 pandemic, Region 9 has included strategies within this document which are intended to bolster the region’s resiliency in the face of future unknown shocks to the economy.

## Council Mission and Membership

### Mission

The Eastern Panhandle Regional Planning and Development Council (Region 9) exists to assist local governments in resolving their common problems; engage in area-wide comprehensive and functional planning; identify, apply for, and administer certain federal and state grants; and provide a regional focus regarding multiple programs undertaken on an area-wide basis.

Region 9 was organized on June 20, 1972, in response to enabling legislation passed by the West Virginia Legislature and approved by the Governor on November 17, 1971. This enabling legislation is known as the Regional Planning and Development Act of 1971 and re-enacted Article 25, Chapter 8, of the West Virginia Code.



City of Martinsburg  
 Town of Hedgesville

Bolivar, Charles Town, Harpers Ferry, Ranson and Shepherdstown



The Town of Bath (Berkeley Springs) and Paw Paw

### Membership

Membership of the Region 9 Council is specified by state law and the Council By-Laws as follows:

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

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

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

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

Membership on the Council has been apportioned as follows:

- Berkley County: 8 total members; 3 elected and 5 non-elected.
- City of Martinsburg: 3 total members; 1 elected 2 non-elected.
- Jefferson County: 7 total members; 6 elected and 1 non-elected.
- Morgan County: 5 total; 3 elected and 2 non-elected.

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

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

<b>Berkeley County</b>	<b>Jefferson County</b>	<b>Morgan County</b>
✓ Council Person James Barnhart	✓ Commissioner Clare Ath	✓ Commissioner William Clark
✓ Mayor of Martinsburg, Kevin Knowles	✓ Mayor of Shepherdstown, Jim Auxer	✓ Mayor of the Town of Bath (Berkeley Springs), Scott Merki
✓ Mayor of Hedgesville, Carey Gano	✓ Mayor of Bolivar, Helen Dettmer	✓ Mayor of Paw Paw, Darlene Abe
✓ Guy Avey, III, Citizen Appointee	✓ Mayor Charles Town, Bob Trainor	✓ Daryl Cowles, Citizen Appointee
✓ Mark Baldwin, Citizen Appointee	✓ Mayor of Harpers Ferry, Gregory Vaughn	✓ Lyn Goodwin, Citizen Appointee
✓ Dr. James Carrier, Citizen Appointee	✓ Mayor of Ranson, Duke Pierson	
✓ Sandy Hamilton, Citizen Appointee	✓ Dennis Jarvis, Citizen Appointee	
✓ Neil McLaughlin, Citizen Appointee		
✓ Jennifer Smith, Citizen Appointee		
✓ Chris Strovel, Citizen Appointee		
✓ Chad Winebrenner, Citizen Appointee		

## SWOT Analysis

Between 2013-2021, the Eastern Panhandle added over 13,000 jobs; however, due to its proximity to neighboring states with higher pay rates, over 40% of Panhandle residents hold jobs outside of the state<sup>1</sup>. Berkeley County has enjoyed the strongest rate of job growth over the long-term and has rebounded the fastest from the COVID-19 recession. Over the past 20 years, the region has added nearly 64,000 residents, offsetting a substantial portion of the 85,000+ decline in residents from the balance of the state’s other counties<sup>2</sup>. The region’s population is expected to grow at a rate of 1.1 – 1.2% annually through 2027<sup>3</sup>; this growth rate was paramount in determining the objectives and strategies within this plan.

Through the fall of 2022, an in-depth analysis of regional strengths, weaknesses, opportunities, and threats (commonly known as a “SWOT” analysis) was conducted to determine the issues and opportunities important to our region. Participants included representatives from the Region 9 board, elected officials, utility operators, local business and industry, tourism, regional transportation, education, non-profit organizations, as well as the general public. The SWOT identified key themes which will support this plan’s vision. **These themes included the need for adequate infrastructure, diverse education opportunities and workforce placement, and quality of life.**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>✓ Low Cost of Living</li> <li>✓ Quality of Place</li> <li>✓ Primary Health Services</li> <li>✓ Outdoor recreation</li> </ul>	<ul style="list-style-type: none"> <li>✓ Lack of sufficient infrastructure (water, broadband)</li> <li>✓ Underperforming K-12 educational systems with lack of physical capacity to accommodate growing student population.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>✓ Increased diversity</li> <li>✓ New perspectives to promote change for positive outcomes.</li> <li>✓ Eastern WV Regional Airport (MRB) expansion</li> </ul>	<ul style="list-style-type: none"> <li>✓ Funding concerns for the MARC train</li> <li>✓ Substance abuse</li> </ul>

<sup>1</sup> U.S. Census Bureau

<sup>2</sup> Deskins, J. and Lego, B. (2023) The Eastern Panhandle Economic Outlook, 2023 – 2027. WVU Bureau of Business & Economic Research

<sup>3</sup> *ibid.*, 2



According to stakeholders, the biggest strength within the region is the low cost of living, coupled with excellent quality of life amenities, including public safety, primary health services, and outdoor recreation, which is contributing to the region's population and diversity. While the region's population maintain a strong sense of "hometown pride" in their communities, they are receptive to increased diversity and perspectives from new residents that promote change for positive outcomes.

The region's location to major metropolitan areas and its proximity to the interstate highway network has facilitated strong residential, commercial, and industrial development growth. The region was identified as needing a unified, long-term growth management plan that includes the collective needs of the population, environment, and infrastructure considering this growth. Commercial and industrial development is thriving due to the region's vocational and technical training institutions which support a strong workforce development environment. Workforce participation rates in all three counties exceed the national average. However, the region's K-12 educational systems were identified as a weakness as underperforming and lacking physical capacity to accommodate student population growth.

One of the primary weaknesses identified by stakeholders is the lack of sufficient infrastructure to support not only the population demand, but any continued business and industrial growth. Water infrastructure is experiencing the highest strain. Additionally, broadband service has now become a critical utility that this region is lacking. Stakeholders and the public are concerned with broadband and cellular service coverage. With more jobs allowing or requiring remote work, as well as opportunities for rural telehealth and education, fiber broadband service is an imperative asset that needs to be expanded upon to the thousands of unserved residents within the region. Stakeholders also identified the Eastern WV Regional Airport (MRB) as the most under-utilized asset in the region. With the longest runway in the state, and ample ground for further development, stakeholders strongly encouraged the expansion and marketing of this regional asset.

**Priority transportation projects within the region include:**

- ✓ Further widening and safety improvements along Interstate 81 and WV Rt 9 West between Martinsburg and Berkeley Springs
- ✓ Improving Interstate 81 Exit 12 at WV Rt. 4
- ✓ Improving intersections along US Rt. 11
- ✓ Completing the US 340 Rock Slide Remediation and Operational Improvements projects near Harper's Ferry,
- ✓ The Charles Town Interchange at US340/WV9/WV51, and
- ✓ The Eastern Panhandle Transit Authority's (EPTA) new Transit Center and commuter bus service to Northern Virginia.

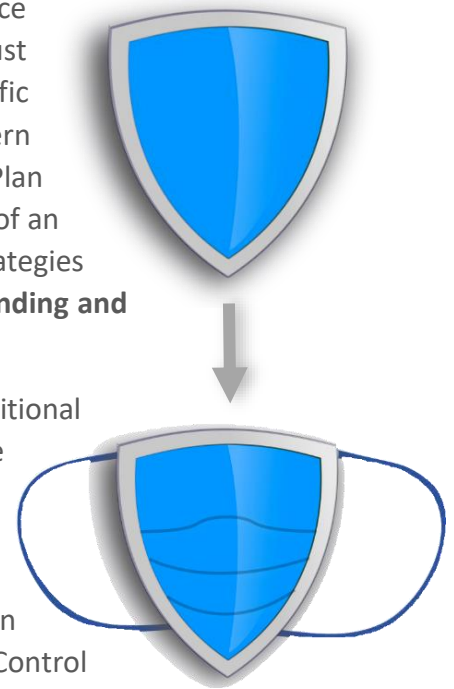
While some of these have been programmed within the state’s Statewide Transportation Improvement Program (STIP), others will need to continue to be supported by Region 9 and the Hagerstown Eastern Panhandle Metropolitan Planning Organization (HEPMPO). Berkeley and Jefferson Counties enjoy service from the Maryland Transit Administration’s MARC Train. This train relieves roadway congestion and provides West Virginia’s residents access to Capitol area markets. Stakeholders have identified funding concerns for maintaining MARC service to the Eastern Panhandle. The rising earnings from commuters traveling into the DC beltway are anticipated to play a major role in boosting local income levels; healthy equity market returns and rising home prices will boost investment income and overall wealth.

Finally, stakeholders and the public are also concerned with substance abuse issues that plague this region, this state, and this nation. While Region 9 does not possess the authority to enforce laws, nor the expertise to oversee preventative and rehabilitative programs, we can assist in creating stronger pathways of hope for our youth and those in recovery. By implementing the strategies below, Region 9 will facilitate job growth, wage competition, and diverse career options. Region 9 will assist community partners to increase quality of life by offering alternatives to substance abuse. Region 9 will support educational systems to provide consistent intervention, and skill development necessary for students to become marketable professionals who take pride in their work and community.

## Economic Resiliency

All communities, whether those in locations likely to experience significant natural disasters or those dealing with economic shifts, must be able to recognize their vulnerabilities. While there is no specific method for building regional economic resilience, the Eastern Panhandle Planning and Development Council's 2023 -2027 CEDS Plan includes several strategies and actions that can mitigate the effects of an economic incident and support long-term recovery efforts. These strategies are built around the three points to resilience: **Preventing, Withstanding and Recovering** and can be thought of as the three points of a shield.

In response to the COVID-19 pandemic, Region 9 has included additional strategies within this document which are intended to bolster the region's resiliency in the face of future unknown shocks to the economy. Strategies have been developed from stakeholder input and lessons learned throughout the Covid-19 Pandemic. These strategies are marked with a blue facemask. The shield has been modified to reflect a face covering, which the Center for Disease Control Prevention recommends wearing to protect others as well as yourself from spreading and contracting Covid-19.



The strategies identified in the following section revolve around the below concepts:

### 1. Establishing Networks

Region 9 will continue to establish mechanisms to facilitate active and regular communication between the relevant sectors to collaborate on common challenges. Economic development professionals will work with their local/ regional emergency managers to address the risks identified through hazard mitigation planning.

### 2. Identifying regional economic challenges or deficiencies

Region 9 will continue to monitor and report on “weak spots” or threats such as education, substance addiction, and infrastructure gaps.

### 3. Monitoring and adapting to emerging trends (Economic, Technology, Environmental, Policy)

Region 9 will continue to educate their staff on resources which discuss future shifts in economics, technology, policy, environmental, education, or other sectors. For example, Business Recovery Centers, and WVU's Eastern Panhandle Economic Outlook.

### 4. Promoting a positive vision for the region

Region 9 will continue to communicate and promote the region's assets and opportunities to encourage potential outside investment, as well as with existing local stakeholders.

## Strategic Direction / Action Plan

This report identifies the key findings of a research process and input from the community and the private sector. Each recommendation included in the report is related to this plan's vision:






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


During the community and private sector participation three key themes emerged as the foundation to which this plan will support our vision, economic growth, and resiliency.




- ✓ **Key Theme One:       Infrastructure**
- ✓ **Key Theme Two:       Education and Workforce Placement**
- ✓ **Key Theme Three:    Quality of Life**

## Goals, Objectives, and Strategies





These key themes have been refined to create a Strategic Direction / Action Plan with goals, objectives, and strategies which are designed to be flexible and to reflect any new directions and opportunities as they are identified.

<b>Goal #1: Ensure adequate quantity and quality of infrastructure and resources</b>		
<b>Objective 1.A.</b>	<b>Support a diverse and resilient transportation network</b>	
	Strategy 1.A.1	Support prioritized system preservation funding that accounts for region’s increased population growth and vehicle miles traveled
	Strategy 1.A.2	Foster further relationship with the State of West Virginia and the State of Maryland to increase MARC train ridership (i.e. marketing)
	Strategy 1.A.3	Promote downtown interconnectivity of walking and biking throughout the region
	Strategy 1.A.4	Assist in locating funding and supporting public transit to locations outside established routes (i.e. park systems, local events, human service facilities)
	Strategy 1.A.5	Support and inform all communities on all transportation infrastructure planning and project funding opportunities. Provide this support when practical to Morgan County that is not within the jurisdiction of the Hagerstown Eastern Panhandle Metropolitan Planning Organization (HEPMPO)
	Strategy 1.A.6	Encourage and support the work of HEPMPO by participation in the planning process for new roadway improvements and highway intersection upgrades as warranted by the growing population and traffic within the region
	Strategy 1.A.7	Assist the Eastern Panhandle Transit Authority (EPTA) in constructing a system that better meets the demand for transit service within the agency’s service area
	Strategy 1.A.8	Support future growth opportunities for freight expansion
	Strategy 1.A.9	Evaluate effect of growth on quality of local and secondary road infrastructure
	Strategy 1.A.10	Evaluate methods to support public transportation services within Morgan County
	Strategy 1.A.11	Support WV Division of Highways in efforts to provide a reliable, consistent and timely permitting process when compared to other regions in the State
	Strategy 1.A.12	Support the promotion, growth and development of the Eastern WV Regional Airport











<b>Objective 1.B.</b>	<b>Maintain adequate supply of readily available sites for manufacturing, technology, distribution and commercial activities for employer expansion or relocation</b>	
	Strategy 1.B.1	Evaluate properties to determine needed utilities and feasibility to reach appropriate level of site readiness and identify available funding resources to assist
	Strategy 1 B.2	Assist local development authorities with conducting financial assessments and feasibility plans which incorporate shell building construction and other levels of site readiness
	Strategy 1.B.3	Support diversification of housing to assist in addressing lack of supply for incoming industry workforce
	Strategy 1.B.4	Inventory commercial real estate and examine needs of target industries for sites to include co-location development
<b>Objective 1.C.</b>	<b>Improve communication networks including broadband internet, mobile service, and emergency communication</b>	
	Strategy 1.C.1	Develop plans and projects to support providing countywide broadband service and cellular coverage to residents and businesses
	Strategy 1.C.2	Foster relationships with service providers and encourage expansion and upgrades to system development by private sector entities
	Strategy 1 C.3	Partner with Education, Industry and Research Organizations to encourage involvement in standards development, open architecture and the evolution of work and markets
	Strategy 1 C.4	Assist Morgan, Berkeley, and Jefferson Counties in developing public education campaign to inform residents of all available internet connectivity options, including low-income affordability programs
	Strategy 1 C.5	Improve virtual platforms for local governments such as telehealth services for day report centers, remote judicial services, online payments, and municipal remote work plans
<b>Objective 1. D.</b>	<b>Improve, expand, and preserve new and existing water/sewer/natural gas infrastructure</b>	
	Strategy 1.D.1	Assist in evaluating capital budgets to ensure right-sizing infrastructure for projected regional demand
	Strategy 1.D.2	Evaluate limitations of developer needs to install utilities for prospective infrastructure demands
	Strategy 1.D.3	Assist in the facilitation of public-private partnerships to support development need to install prospective infrastructure
	Strategy 1.D.4	Evaluate and identify methods for natural gas expansion within the region
	Strategy 1.D.5	Determine avenue for utility capital outlay







<b>Objective 1.E.</b>	<b>Promote responsible stewardship of natural resources on land, water, and in our air to ensure resiliency</b>	
	Strategy 1.E.1	Assist in the implementation of projects identified within the region’s Hazard Mitigation Plans
	Strategy 1.E.2	Continue coordinating with local government efforts in managing stormwater and Chesapeake Bay mandates
	Strategy 1.E.3	Promote programs which maintain, or improve, the region’s current National Ambient Air Quality Standards (NAAQS)
	Strategy 1.E.4	Encourage developing and implementing local energy efficiency programs
	Strategy 1.E.5	Support development that considers implementing smart stormwater management systems, including green infrastructure

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

<b>Objective 2.A.</b>	<b>Expand workforce development initiatives</b>	
	Strategy 2.A.1	Support paid apprenticeship and internship programs
	Strategy 2.A.2	Evaluate initiatives to address wealth gap between existing residents and attracting new employees from out-of-state
	Strategy 2.A.3	Build relationships with local workforce training program managers and other skill development opportunities
<b>Objective 2.B. Support the expansion of regional economic development resources for small businesses and access to local employment</b>		
	Strategy 2.B.1	Participate in local Chamber of Commerce activities and encourage regional support for young professional networks
	Strategy 2.B.2	Support development of innovation and entrepreneurship centers
	Strategy 2.B.3	Continue partnership with Small Business Development Center in providing training and promoting incentives for small businesses
	Strategy 2.B.4	Assist in entrepreneurial development, start-up assistance and other business opportunities
	Strategy 2.B.5	Utilize Region 9 website and social media to promote networking opportunities, educational opportunities, and business tools
	Strategy 2.B.6	Promote developed repository of resources for small business to include, but not limited to, workforce training, employee resources, digital marketing tools, financing, etc.
	Strategy 2.B.7	Continue to encourage attendance and participation at the Eastern Panhandle Entrepreneurs Forum
<b>Objective 2.C. Create a presence within the education sector</b>		
	Strategy 2.C.1	Continue building strong relations with technical institutes and community colleges within region
	Strategy 2.C.2	Encourage and support the popularity of STEM opportunities and diversity in education
	Strategy 2.C.3	Support uniform administration, curriculum development, and oversight throughout K-12 school systems



<b>Goal 3: Facilitate equity and a high quality of life for the region’s residents</b>		
<b>Objective 3.A.</b>	<b>Attract and retain area youth</b>	
	Strategy 3.A.1	Encourage leaders and decision-makers to review the makeup of various boards within the region to encourage diversification of candidates during new appointment process
	Strategy 3.A.2	Support and promote Main Street/OnTRAC initiatives and events
	Strategy 3.A.3	Evaluate community branding to focus on younger target audience
	Strategy 3.A.4	Assist with the redevelopment and restoration of historic districts and other underutilized areas in the region
	Strategy 3.A.5	Support amenities and nightlife for youth
<b>Objective 3.B.</b>	<b>Identify and promote recreation and leisure opportunities</b>	
	Strategy 3.B.1	Identify funding to support efforts which promote and markets the region’s tourism industry
	Strategy 3.B.2	Encourage State Tourism Department to promote private tourism opportunities
	Strategy 3.B.3	Support initiatives for the development of outdoor recreation opportunities
	Strategy 3.B.4	Support continual strategic planning and assist in finding funding for Parks and Recreation to accommodate the needs of both the growing population and programming for different age groups
<b>Objective 3.C.</b>	<b>Support general and social needs programs</b>	
	Strategy 3.C.1	Improve walkability to critical services
	Strategy 3.C.2	Support substance abuse disorder treatment programs and facilities
	Strategy 3.C.3	Support growth of local health systems to attract and retain specialty care
	Strategy 3.C.4	Support both public and private investments in affordable youth and childcare
<b>Objective 3.D.</b>	<b>Encourage greater community involvement and a regional sense of pride</b>	
	Strategy 3.D.1	Continue to support local farm to table initiatives; farmer’s markets
	Strategy 3.D.2	Coordinate the promotion of volunteer opportunities in communities
	Strategy 3.D.3	Encourage and support partnerships between local governments and non-profit entities that provide services to residents

<b>Goal 4: Solidify the region’s economic competitiveness with surrounding states</b>		
<b>Objective 4.A.</b>	<b>Nurture communication networks to support and promote the missions and objectives of local governments and their respective agencies</b>	
	Strategy 4.A.1	Promote existing tax incentive programs such as HubZones, New Market Tax Credits, and Opportunity Zones
	Strategy 4.A.2	Promote and assist in the development of downtown development tax incentives
	Strategy 4.A.3	Facilitate partnership with State leadership to promote uniqueness of the region
	Strategy 4.A.4	Maintain regular communication with local legislators and leadership to ensure State leadership is apprised of both needs and successes of the region
	Strategy 4.A.5	Continue to manage the Eastern West Virginia Economic Alliance that promotes the four-county region as a business-friendly location close to the DC-Baltimore Metropolitan region
	Strategy 4.A.6	Support transparency of future state and regional programming and fiscal health
	Strategy 4.A.7	Support rebranding of Eastern Panhandle through its distinguishing features from rest of State
	Strategy 4.A.8	Promote public safety of region
<b>Objective 4.B.</b>	<b>Examine and support regionalized solutions to ensure competitiveness</b>	
	Strategy 4.B.1	Evaluate limitations on taxing authorities that may stifle continued growth
	Strategy 4.B.2	Evaluate Home Rule limitations and provide support to local governments where able
	Strategy 4.B.3	Support the imposition of locality pay and competitive wages comparable to bordering counties
	Strategy 4.B.4	Encourage continued partnerships with bordering states of Maryland, Virginia, and Pennsylvania
	Strategy 4.B.5	Determine sources outside of local funds to match federal dollars for operations, grants and projects
	Strategy 4.B.6	Evaluate centralized State control of local government functions that may disrupt future planning; show regional autonomy model through local return on investment
	Strategy 4.B.7	Evaluate complex taxing mechanism used by businesses to determine tax burden

## Evaluation Framework

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

### Performance Measures

1. Number of Jobs Created After Implementation of the CEDS
  - a. Total Employment in Initial Year
  - b. Total Employment in Subsequent Year 2
2. Number and Types of Public Sector Investments Undertaken in the Region
  - a. EDA Sponsored Investments
  - b. Significant State and Local Investments
3. Private Sector Investment in the Region After Implementation of the CEDS
4. Gross Domestic Product growth in the Hagerstown Eastern Panhandle Metropolitan Planning Organization

### Key Themes Indicators

1. Infrastructure
  - a. Average Internet Speed
  - b. Lane Miles
  - c. WV READY Properties\*
  - d. Public Water and Sewer Service area (acres or square miles)
2. Education and Work Force Placement
  - a. High School Graduation Rates
  - b. 8th Grade Science, Math, and Reading Performance
  - c. Higher Education and Certificate Attainment
  - d. Average Annual Wage by Educational Attainment
3. Quality of Life
  - a. Median Household Income
  - b. House Purchase Price and Cost of Living Index
  - c. Persons Living in Poverty
  - d. Median age and Percentage of Population between 24 -35 years old
  - e. National Ambient Air Quality Index, Water Quality Initiatives, Chesapeake Bay Progress

# Technical Report

## People of the Region



Photo 1: Shepherdstown, West Virginia

### Growth Trend 1: Population

In Table 1, we present the population in Berkeley County, Jefferson County, Morgan County, Region 9, West Virginia and the United States from 2010 – 2027. As of the 2020 census, Region 9 had a population of 196,840, which represents a 12.35% increase from 2010 (see Table 1). The population is expected to continue to grow and, by 2027, projections show a population of 212,416. Berkeley County is the largest county in Region 9 and accounts for much of the past and future regional growth. From 2010 to 2020, Berkeley County increased in population by 17.2%, and is projected to increase another 6.53% between 2021 and 2027. Morgan County is the smallest county in the region and experienced a 2.73% decline in population between 2010 and 2020 but is projected to increase slightly between 2021 and 2027 at 2.27%. Jefferson County’s population growth falls between Berkeley and Morgan Counties, at 7.9% from 2010 to 2020, with projected continued growth of 3.65% between 2021 - 2027. This regional growth stands in stark contrast to West Virginia’s total population trajectory, which declined from 3.20% between 2010 and 2020 and is projected to decline again by 1.92% between 2021 and 2027. Nationally, the United States population grew 6.85% from 2010 – 2020 and is projected to grow 5.01% between 2021 - 2027.

TABLE 1: POPULATION IN REGION 9, WEST VIRGINIA, AND THE UNITED STATES, 2010 - 2027

	Berkeley County	Jefferson County	Morgan County	Region Total	West Virginia	United States
<b>2010 (Actual)</b>	104,169	53,498	17,541	175,208	1,852,994	308,745,538
<b>2020 (Actual)</b>	122,076	57,701	17,063	196,840	1,793,716	331,449,281
<b>2021 (Estimate)</b>	126,069	58,370	17,221	201,660	1,785,526	332,031,554
<b>2027 (Projected)</b>	134,303	60,501	17,612	212,416	1,751,224	348,659,115
<b>Percent Change, 2010 - 2020</b>	17.20%	7.90%	-2.73%	12.35%	-3.20%	6.85%
<b>Projected Percent Change, 2021 - 2027</b>	6.53%	3.65%	2.27%	5.33%	-1.92%	5.01%
<b>Projected Percent Annual Change, 2021 - 2027</b>	1.09%	0.61%	0.38%	0.89%	-0.32%	0.83%

Sources: Quick Facts U.S. Census Bureau; West Virginia Economic Development, Explore Communities

### Growth Trend 2: Changing Age Composition

While Region 9 has a population that is slowly aging, overall, it is younger than the state.<sup>4</sup> In Table 2, we present the median age in Berkeley County, Jefferson County, Morgan County, West Virginia, and the United States from 2000 – 2021. From 2010 - 2021, Berkeley and Jefferson Counties median age increased by approximately 1.5 years and a little over two years, respectively, while the median age of Morgan County’s population increased by eleven years. While Morgan County contains a larger proportion of retirement-aged residents<sup>5</sup>, it is an opportunity for local leaders and businesses to take stock of available services, including Senior Centers and health care facilities, including long-term care facilities.

As of 2021, Berkeley and Jefferson counties are similar in age to the United States, and slightly younger than West Virginia as a whole. While Morgan county’s median age is considerably higher than that of the state and the nation, when looking at the percentage of the county that is of prime working age (between 25 and 54), Morgan County is on par with West Virginia as a whole<sup>6</sup>.

TABLE 2: MEDIAN AGE IN REGION 9, WEST VIRGINIA, AND THE UNITED STATES, 2000 - 2021

	Berkeley County	Jefferson County	Morgan County	West Virginia	United States
<b>2000</b>	35.8	36.8	40.7	38.9	35.3
<b>2010</b>	37.5	38.8	37.5	41.3	37.1
<b>2021</b>	39	41	48.5	42.6	38.4
<b>% Change 2000 to 2010</b>	4.75%	5.43%	-7.86%	6.17%	5.10%
<b>% Change 2010 to 2021</b>	4.00%	5.67%	29.33%	3.15%	3.50%
<b>% of Population between 25 and 54 years old in 2021</b>	40.5%	38.7%	35.6%	36.8%	39.1%
<b>% of Population 55 and older in 2021</b>	28.1%	30.7%	40%	34.2%	28.9%

Source: U.S. Census Bureau, ACS 5-Year, 2021

<sup>4</sup> Deskins, J. and Lego, B. (2023) The Eastern Panhandle Economic Outlook, 2023 – 2027. WVU Bureau of Business & Economic Research

<sup>5</sup> Ibid., 4

<sup>6</sup> Ibid., 4

### Growth Trend 3: Educational Attainment

In general, the country, West Virginia and Region 9 are becoming more educated. In Table 3, we present educational attainment for population 25 years and older for Berkeley County, Jefferson County, Morgan County, West Virginia, and the United States. Berkeley and Jefferson Counties are more educated than the state in terms of bachelor's degree at 14.5% and 19.1%, respectively, and all three counties have made progress in the percent of population achieving some college or better. There is an opportunity for local leaders and education providers to engage “the high school graduate” and the “some college no degree” cohorts about the benefits and affordability of local Community and Technical colleges, thus addressing two of the themes in the CEDS, diverse education opportunities and qualified workforce.

Berkeley and Jefferson counties have made strong improvements in their high school graduation rates: in 2010 in Berkeley County, 15.1% of adults aged 25+ had not completed high school. In contrast, by 2020 in Berkeley, only 9.7% of adults aged 25+ had not completed high school. This reduction is significantly larger than that observed in the United States as a whole over the same time period and is similar to the reduction in West Virginia as a whole. Jefferson County experienced a similar magnitude reduction. This could represent an opportunity for local employers seeking a workforce with a high school degree or more.

TABLE 3: EDUCATIONAL ATTAINMENT- POPULATION 25 YEARS AND OVER (YEAR 2010, 2020)

	Berkeley County	Jefferson County	Morgan County	West Virginia	United States
<b><i>% Population Age 25+ - less than HS</i></b>					
<b>2010</b>	15.1	14.8	15.9	18.1	14.9
<b>2020</b>	9.7	9.5	11.9	12.4	11.5
<b>% Change</b>	-5.4	-5.3	-4.0	-5.7	-3.4
<b><i>% Population Age 25+ - High School Graduate (or equivalency)</i></b>					
<b>2010</b>	39.5	33.1	51.0	41.3	29.0
<b>2020</b>	37.4	30.7	42.1	40.0	26.7
<b>% Change</b>	-2.1	-2.4	-8.9	-1.3	-2.3
<b><i>% Population Age 25+ - Some College (no degree)</i></b>					
<b>2010</b>	19.7	17.5	16.6	17.6	20.6
<b>2020</b>	21.7	20.9	20.1	18.7	20.3
<b>% Change</b>	2.0	3.4	3.5	1.1	-0.3
<b><i>% Population Age 25+ - Associates Degree</i></b>					
<b>2010</b>	6.0	6.9	3.9	5.8	7.5

<b>2020</b>	8.4	7.3	7.3	7.6	8.6
<b>% Change</b>	2.4	0.4	3.4	1.8	1.1
<b>% Population Age 25+ - Bachelor's Degree</b>					
<b>2010</b>	12.3	16.8	9.3	10.6	17.6
<b>2020</b>	14.5	19.1	9.6	12.7	20.2
<b>% Change</b>	2.2	2.3	0.3	2.1	2.6
<b>% Population Age 25+ - Graduate or Professional Degree</b>					
<b>2010</b>	7.5	10.9	3.3	6.7	10.3
<b>2020</b>	8.4	12.5	9.0	8.6	12.7
<b>% Change</b>	0.9	1.6	5.7	1.9	2.4

Source: U.S. Census Bureau ACS 5-Year, 2010, 2020

#### Growth Trend 4: Median Income by Educational Attainment

Typically, individuals with higher educational attainment earn more than individuals with lower educational attainment, as educational attainment correlates with higher potential productivity. In Table 4, we present median income levels by educational attainment not only for Berkeley County, Jefferson County, Morgan County, West Virginia, and the United States, but also for the neighboring counties of Washington County, MD and Frederick County and Loudon County, Virginia, given that over 40% of Panhandle residents hold jobs outside of the state.

In Region 9, Berkeley County and Jefferson County have relatively high median incomes compared to West Virginia as a whole: across all education levels, the median income level in Berkeley County was \$40,339 in 2020, and, for Jefferson County, was \$47,675. These both far outstripped median income in West Virginia in 2020, at \$35,792 and are somewhat comparable to Washington and Frederick Counties, at \$42,472 and \$47,732, respectively. Loudon County's median income is far higher at \$76,541.

In general, incomes have risen in Region 9 counties from 2010 to 2020: across all education levels, the median income rose from \$34,165 in 2010 to \$40,339 in 2020 for Berkeley County; from \$40,776 in 2010 to \$47,675 in 2020 in Jefferson County; and from \$31,169 in 2010 to \$36,021 in Morgan County. However, it is noteworthy that, in relative terms, these increases did not keep pace with growth in median income in the surrounding counties, or in West Virginia or the United States as a whole. Median incomes grew by 18.1%, 16.9%, and 15.6% in Berkeley, Jefferson, and Morgan Counties, respectively, compared to 21.2% in Washington County, 31.7% in Frederick County, 23.7% in Loudon County, 23.2% for West Virginia and 21.2% for the United States overall.

The relative stagnation of incomes for individuals aged 25 and older with some college (no degree) or an associate's degree is noteworthy. In Berkeley County, median income for this group was \$37,350 in 2010, and rose only 5.7% to \$39,494 in 2020. In Jefferson County, median income

for this group was \$43,151 in 2010 and fell by 1.9% to \$42,321 in 2020. This stands in direct contrast to the income growth for this educational cohort experienced by Washington County, MD (15.8%) and Frederick County (23.4%), West Virginia (15.1%) and the United States (13.9%) over this same period. This is especially striking given the distribution of educational attainment presented in Table 3, above: in Berkeley and Jefferson Counties in 2020, 30.1% and 28.2% of individuals aged 25 and older were in this educational cohort. Thus, a substantial portion of the working population in these two counties experienced income stagnation from 2010-2020; moreover, given recent inflation which is not reflected in this data, real incomes for this group may have fallen significantly.

This represents an opportunity for local leaders and employers to invest in upskilling for this underemployed population.

TABLE 4: MEDIAN INCOME BASED ON LEVEL OF EDUCATIONAL ATTAINMENT (YEAR 2010, 2020)

Location	2010	2020	% Change
<i>Median Income -Age 25+, less than HS</i>			
Berkeley County, WV	\$21,061	\$24,113	14.5%
Jefferson County, WV	\$26,364	\$25,442	-3.5%
Morgan County, WV	\$16,508	\$27,265	65.2%
Washington County, MD	\$22,539	\$28,560	26.7%
Frederick County, VA	\$23,942	\$30,778	28.6%
Loudon County, VA	\$23,565	\$31,566	34.0%
West Virginia	\$17,689	\$21,681	22.6%
United States	\$19,492	\$25,351	30.1%
<i>Median Income -Age 25+ - High School Graduate (or equivalency)</i>			
Berkeley County, WV	\$30,776	\$36,721	19.3%
Jefferson County, WV	\$31,475	\$36,961	17.4%
Morgan County, WV	\$29,504	\$34,258	16.1%
Washington County, MD	\$31,224	\$34,301	9.9%
Frederick County, VA	\$32,444	\$40,055	23.5%
Loudon County, VA	\$35,555	\$40,704	14.5%
West Virginia	\$24,868	\$30,727	23.6%
United States	\$27,281	\$32,002	17.3%



Location	2010	2020	% Change
<b><i>Median Income -Age 25+ - Some College (no degree) or Associates</i></b>			
Berkeley County, WV	\$37,350	\$39,494	5.7%
Jefferson County, WV	\$43,151	\$42,321	-1.9%
Morgan County, WV	\$28,190	\$37,650	33.6%
Washington County, MD	\$35,997	\$41,678	15.8%
Frederick County, VA	\$38,285	\$47,238	23.4%
Loudon County, VA	\$51,025	\$53,534	4.9%
West Virginia	\$28,597	\$32,908	15.1%
United States	\$33,593	\$38,258	13.9%
<b><i>Median Income -Age 25+ - Bachelor's Degree</i></b>			
Berkeley County, WV	\$43,704	\$51,853	18.6%
Jefferson County, WV	\$56,261	\$63,797	13.4%
Morgan County, WV	\$49,183	\$46,560	-5.3%
Washington County, MD	\$47,981	\$57,282	19.4%
Frederick County, VA	\$47,837	\$59,368	24.1%
Loudon County, VA	\$75,419	\$90,476	20.0%
West Virginia	\$40,128	\$45,995	14.6%
United States	\$48,485	\$56,152	15.8%
<b><i>Median Income -Age 25+ - Graduate or Professional Degree</i></b>			
Berkeley County	\$50,532	\$59,468	17.7%
Jefferson County	\$63,472	\$74,301	17.1%
Morgan County	\$46,806	\$56,693	21.1%
Washington County, MD	\$60,992	\$77,472	27.0%
Frederick County, VA	\$66,17	\$64,310	-2.7%
Loudon County, VA	\$92,390	\$109,811	18.9%
West Virginia	\$50,354	\$58,094	15.4%
United States	\$63,612	\$75,328	18.4%
<b><i>Median Income -Age 25+ - All (with earnings)</i></b>			
Berkeley County	\$34,165	\$40,339	18.1%
Jefferson County	\$40,776	\$47,675	16.9%
Morgan County	\$31,169	\$36,021	15.6%

<b>Washington County, MD</b>	\$35,041	\$42,472	21.2%
<b>Frederick County, VA</b>	\$36,256	\$47,732	31.7%
<b>Loudon County, VA</b>	\$61,875	\$76,541	23.7%
<b>West Virginia</b>	\$29,053	\$35,792	23.2%
<b>United States</b>	\$34,665	\$42,002	21.2%

Source: U.S. Census Bureau, S2001 Earnings in the Past 12 Months (ACS 5-Year, 2010, 2020)

## Economic Resilience

### Job Trends

The economic performance and potential of a regional can be characterized by the composition of employment by industry. In Table 5, we present the total employment by industry in Berkeley, Jefferson, and Morgan counties as of 2022 Q1, as well the contribution of each sector to overall regional employment. We used as a data source for this analysis the Census Bureau’s “Quarterly Workforce Indicators”, which includes data on most private sector employment. It is important to note that, at the time of writing, it does not appear that federal employment data has been incorporated into this data source<sup>7</sup>. However, this represents the best publicly available data source on timely, detailed, private sector employment.

The industry with the highest employment in Region 9 is **Retail Trade**, which comprises 16.03% of jobs in the region. The second-largest industry in the region is **Accommodation and Food Services**, which comprises 14.34% of jobs in the region. The third-largest industry in the region is **Health Care and Social Assistance**, which comprises 13.76% of jobs in the region. Together, these three industries account for over 44% of all private sector jobs in Region 9.

The counties composing Region 9 differ significantly in their dominant industries. **Berkeley County** reported 28,842 private sector jobs for 2022 Q1. The top employing industry in the county was Retail Trade (4,528 jobs, or 15.7% of total), followed by Health Care and Social Assistance (4,152 jobs, or 14.4% of total), Manufacturing (3,753 jobs, or 13.0% of total), Transportation and Warehousing (3,703 jobs, or 12.8% of total), and Accommodation and Food Services (2,884 jobs, or 10.0% of total). Together, these five sectors accounted for 65.9% of private sector employment in the county.

**Jefferson County** reported 12,064 private sector jobs for 2022 Q1. The top employing industry in the county was Accommodation and Food Services (3,009 jobs, or 24.9% of total), which may reflect either tourism to Harper’s Ferry or patronage of Hollywood Casino and Racetrack in Charlestown. The second largest industry is Retail Trade (1,942 jobs, or 16.1% of total), Health Care and Social Assistance (1,229 jobs, or 10.2% of total), Professional, Scientific, and Technical Services (1,130 jobs, or 9.4% of total), and Administrative and Support and Waste Management and Remediation Services (956 jobs, or 7.9% of total). Together, these sectors accounted for 68.5% of private sector employment in the county.

**Morgan County** reported 2,129 private sector jobs for 2022 Q1. The top employing industry in the county was Health Care and Social Assistance (541 jobs, or 25.4% of total), which may reflect the aging population in that county (see Table 2, above, for additional detail on age structure). The second largest industry in the county was Retail Trade (431 jobs, or 20.2% of total),

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<sup>7</sup> Hayward, H. (2022). The Quarterly Workforce Indicators (QWI). QWI Basics and QWI Explorer Training. [Downloaded on 2.7.23](#)

Accommodation and Food Services (279 jobs, or 13.1% of total), Manufacturing (255 jobs, or 12.0% of total), and Construction (111 jobs, or 5.2% of total). Together, these sectors accounted for 75.9% of private sector employment in the county.

TABLE 5: EMPLOYMENT BY PRIVATE SECTOR (Q1 YEAR 2022)

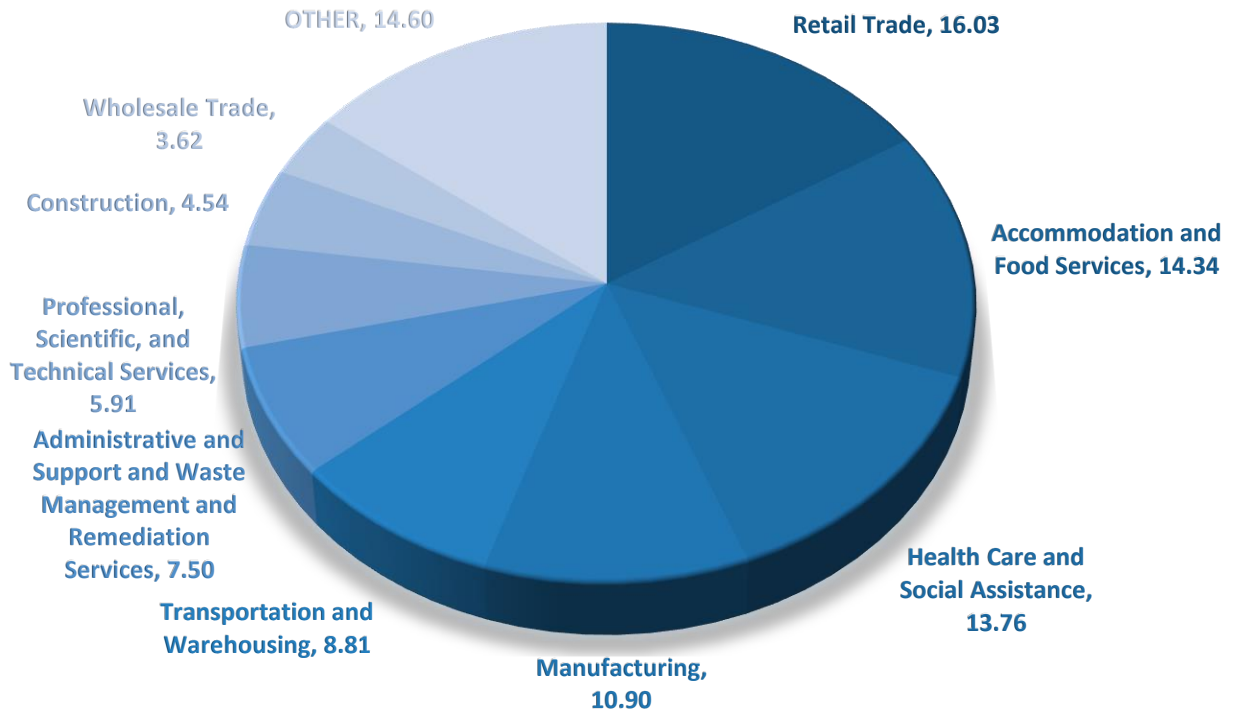
	Berkeley County	Jefferson County	Morgan County	Regional Share of Job Market by Sector
<b>Retail Trade</b>	4528	1942	431	16.03%
<b>Accommodation and Food Services</b>	2884	3009	279	14.34%
<b>Health Care and Social Assistance</b>	4152	1229	541	13.76%
<b>Manufacturing</b>	3753	683	255	10.90%
<b>Transportation and Warehousing</b>	3703	31	57	8.81%
<b>Administrative and Support and Waste Management and Remediation Services</b>	2202	956	69	7.50%
<b>Professional, Scientific, and Technical Services</b>	1335	1130	78	5.91%
<b>Construction</b>	1292	552	111	4.54%
<b>Wholesale Trade</b>	1167	345	46	3.62%
<b>Other Services (except Public Administration)</b>	687	434	82	2.79%
<b>Finance and Insurance</b>	665	411	85	2.70%
<b>Information</b>	939	146	36	2.60%
<b>Educational Services</b>	250	681	0	2.16%
<b>Arts, Entertainment, and Recreation</b>	504	235	12	1.74%
<b>Real Estate and Rental and Leasing</b>	253	204	37	1.15%
<b>Management of Companies and Enterprises</b>	243	21	0	0.61%
<b>Agriculture, Forestry, Fishing and Hunting</b>	177	55	20	0.59%
<b>Utilities</b>	90	0	0	0.21%
<b>Mining, Quarrying, and Oil and Gas Extraction</b>	18	0	0	0.04%

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

Note: No data available for Public Administration.

Figure 1: Eastern Panhandle Private Sector Employment Distribution, 2022 Q1

### EASTERN PANHANDLE PRIVATE SECTOR EMPLOYMENT DISTRIBUTION, 2022 Q1



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

*OTHER includes: Other Services (except Public Administration); Finance and Insurance; Information; Educational Services; Arts, Entertainment, and Recreation; Real Estate and Rental and Leasing; Management of Companies and Enterprises; Agriculture, Forestry, Fishing and Hunting; Utilities; Mining, Quarrying, and Oil and Gas Extraction*

*No data available for Public Administration.*

## Regional Competitiveness Effect

The local economic landscape changes over time, with certain industries becoming more – or less – dominant. In order to capture the extent to which industries in Region 9 are growing (or shrinking) relative to the country as a whole, we calculate the “regional competitiveness effect.” **This is calculated as the difference in percentage growth for a given industry from 2019 Q1 – 2022 Q1 for Region 9 compared to the country as a whole.**

A positive number indicates that a sector grew faster in Region 9 than it did in the nation from 2019 Q1 – 2022 Q1, and is therefore considered a *leading industry*. A negative number indicates either slower growth or decline of an industry in the region and is therefore considered a *lagging industry*. We present top leading and lagging industries in Table 6, below.

The top three leading industries in Region 9 are **Administrative and Support and Waste Management and Remediation Services**, with regional growth 49.48 percentage points higher than for the United States over the same time period; **Management of Companies and Enterprises**, with regional growth 39.71 percentage points higher than for the United States over the same time period; and **Manufacturing**, with regional growth 36.03 percentage points higher than for the United States over the same time period. Conversely, the three most lagging industries are **Information**, with regional growth 30.75 percentage points lower than for the United States over the same time period; **Utilities**, with regional growth 25.85 percentage points lower than for the United States over the same time period; and **Education Services**, with regional growth 11.33 percentage points lower than for the United States over the same time period.

TABLE 6: COMPETITIVENESS EFFECT Q1 2019 to Q1 2022

Leading Industries	Regional Job Sector Growth vs Nation
<b>Administrative and Support and Waste Management and Remediation Services</b>	49.48%
<b>Management of Companies and Enterprises</b>	39.71%
<b>Manufacturing</b>	36.03%
<b>Retail Trade</b>	16.18%
<b>Professional, Scientific, and Technical Services</b>	15.64%
<b>Finance and Insurance</b>	12.51%
<b>Arts, Entertainment, and Recreation</b>	11.9%
<b>Wholesale Trade</b>	11.67%
<b>Real Estate and Rental and Leasing</b>	9.57%
<b>Other Services (except Public Administration)</b>	0.74%

Lagging Industries	
Agriculture, Forestry, Fishing and Hunting	-1.30
Health Care and Social Assistance	-3.54
Accommodation and Food Services	-4.82
Transportation and Warehousing	-9.96
Construction	-10.45
Educational Services	-11.33
Utilities	-25.85
Information	-30.75

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

Note: no data available for Public Administration.

### Location Quotient

The location quotient (LQ) is a way of quantifying how concentrated a particular industry is in one area compared to a larger region. **In this analysis, industry employment in the three-county region is compared to industry employment in the state of West Virginia.** An LQ of greater than 1 means the region has a higher concentration of jobs in a given industry than the state, and an LQ of less than 1 means the state as a whole has a higher concentration of jobs in an industry than does Region 9. Industries with a high LQ value are typically exporting industries and are important because they bring income into the region.

Table 7 demonstrates the difference in industry employment between Region 9 and the state of West Virginia. Industries with an LQ of greater than 1 are highlighted and represent the industries in which Region 9 has a high concentration of workers, and therefore, a competitive advantage. **The LQ indicator should be used with other indicators to determine a total picture of an industry.** For instance, Agriculture, Forestry, Fishing, and Hunting industry (LQ= 1.86) is showing strength locally when compared to the state, but lags when compared to national growth (Table 6). This number can also reaffirm the strongest industries in Region 9. For instance, Manufacturing, Retail Trade, and Professional, Scientific, and Technical Services all have high LQs and are **Leading Industries** when compared to the Nation.

TABLE 7: REGIONAL LOCATION QUOTIENT (YEAR 2021)

Jobs by Industry Type	Region 9		West Virginia		LQ
	Employment	% of Total	Employment	% of Total	
<b>Transportation and Warehousing</b>	3685	8.88%	18560	3.54%	2.51
<b>Educational Services</b>	1035	2.49%	6059	1.16%	2.16
<b>Agriculture, Forestry, Fishing and Hunting</b>	263	0.63%	1787	0.34%	1.86
<b>Information</b>	1043	2.51%	7382	1.41%	1.78
<b>Accommodation and Food Services</b>	5979	14.40%	58058	11.08%	1.3
<b>Manufacturing</b>	4520	10.89%	45093	8.60%	1.27
<b>Arts, Entertainment, and Recreation</b>	786	1.89%	7783	1.49%	1.27
<b>Professional, Scientific, and Technical Services</b>	2535	6.11%	26322	5.02%	1.22
<b>Retail Trade</b>	6734	16.22%	77134	14.72%	1.1
<b>Wholesale Trade</b>	1557	3.75%	19313	3.69%	1.02
<b>Real Estate and Rental and Leasing</b>	481	1.16%	6279	1.20%	0.97
<b>Administrative and Support and Waste Management and Remediation Services</b>	2411	5.81%	32994	6.30%	0.92
<b>Other Services (except Public Administration)</b>	1161	2.80%	16600	3.17%	0.88
<b>Construction</b>	1964	4.73%	31178	5.95%	0.8
<b>Finance and Insurance</b>	1032	2.49%	17339	3.31%	0.75
<b>Health Care and Social Assistance</b>	5962	14.36%	122563	23.39%	0.61
<b>Management of Companies and Enterprises</b>	266	0.64%	8013	1.53%	0.42
<b>Utilities</b>	91	0.22%	5055	0.96%	0.23
<b>Mining, Quarrying, and Oil and Gas Extraction</b>	16	0.04%	16555	3.16%	0.01

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

Note: no data available for Public Administration.



## Regional Infrastructure

Adequate infrastructure is an essential component of economic development, as it can limit the rate and size of development. Each county is planning or already in the construction phase of projects to bring improved infrastructure to its development areas. Infrastructure projects that will increase quality of life in the region's communities are also being planned. Every county and municipality are experiencing growth which has created water and sewer infrastructure issues. In addition, the influx of business brings a need for expanded public services such as schools, hospitals, daycare centers, and public safety personnel. Region 9 is working to provide efficient infrastructure and services to businesses and residents, while continuing to develop the local economy.

Improving water, sewer, natural gas, transportation and broadband infrastructure will increase the competitiveness of the local region and will help to meet the needs of the growing population and business environment. All of these public services are necessary to support continued growth and development within the region. Over the past several years, Region 9 and the Hagerstown Eastern Panhandle Metropolitan Planning Organization have developed studies and plans which improve and protect the areas infrastructure and resources. These plans can be found at [Region9wv.com](http://Region9wv.com) and [www.hepmpo.net](http://www.hepmpo.net).

The COVID-19 pandemic illustrated the growing need for broadband across the Eastern Panhandle. Routine activities of both residents and businesses now require internet access. K-12 schools continue to expand the use of internet-enabled learning resources, and children in households with inadequate internet service are at a disadvantage. Working from home has increased. Trends indicate that employees are no longer expected to report to an office five days a week. This is an economic development opportunity for the Eastern Panhandle. Our proximity to the metro area combined with business-class broadband availability will increase the region's marketability as residents choose where to live, while working in the post-COVID economy.

To drive the improvement of broadband across the Eastern Panhandle, Morgan, Berkeley and Jefferson counties partnered with the West Virginia Department of Economic Development and a broadband consultant to devise strategic plans for each county. The broadband consultant summarized the broadband industry and provided a thorough description of current broadband technology. FCC data, WV Broadband Enhancement Council, and local surveys provided a county-wide broadband gap analysis and outlines the unserved/underserved areas of the counties. These strategic plans identified wireless broadband projects to provided full regional coverage. However, in 2022, federal and state funding priorities shifted focus to fund fiber broadband only with a guaranteed minimum speed of 100 Mbps of download speeds and between 20 Mbps and 100 Mbps upload speeds and be scalable to a minimum of 100 Mbps symmetrical for download and upload speeds.

Region 9 has been working with each of the three counties to identify partners ISPs and apply for applicable state funding. These [plans](#) are available and published on Region 9's website.

## Business and Industrial Parks

### Significance

An inventory of available properties that can accommodate a variety of industries is essential to attracting new employers or retaining existing employers needing to expand.

### Current Conditions

Region 9 has forty-six (46) business and industrial parks/sites/buildings currently available, totaling over 9million sq ft. Properties are concentrated mainly in Martinsburg, Inwood, including Tabler Station; Charles Town, Kearneysville, and Berkeley Springs. Each county development authority promotes available properties using [West Virginia Department of Commerce Property Search](#) that not only provides a searchable database of available industrial parks/sites/buildings at city, county, and regional levels, but also includes community information, occupational data, demographic information, labor force, consumer expenditures, wages, businesses and talent.



*Burr Business Park, Jefferson County, West Virginia*

### Trends and Future Needs



*Morgan County, West Virginia, Business Park*

The initial opening and progressive expansion of production capacity at Proctor and Gamble’s manufacturing plant in Berkeley County, as well as the openings of the Rockwool (Jefferson County) and Clorox (Berkeley County) manufacturing facilities in 2021 and 2022, respectively, coupled with the continued job growth in the Transportation and Warehousing sector indicate that the Region is becoming more competitive in the nation<sup>8</sup>.

West Virginia Forward (WV Forward) is a collaboration among the West Virginia Department of Commerce, West Virginia University, and Marshall University to identify short-term, larger-scale projects that will boost West Virginia’s economic development efforts.<sup>9</sup>

<sup>8</sup> Deskins, J. and Lego, B. (2023) The Eastern Panhandle Economic Outlook, 2023 – 2027. WVU Bureau of Business & Economic Research

<sup>9</sup> [About WV Forward - West Virginia Department of Commerce](#). Downloaded on 2.6.23.

The lack of development-ready industrial sites has been cited by state officials as one of the top three barriers to attract businesses, create jobs and bolster investments in West Virginia. Shovel-ready sites are one of the most effective ways to lure new firms to the state, saving companies time and resources while reducing site location risk and development costs.<sup>10</sup> While Region 9 has been the state’s strongest economic region for over a decade<sup>11</sup>, it could certainly benefit from a state certification system for site readiness to improve its competitiveness.<sup>12</sup>

### **Strategic Findings**

Given the region’s proximity to large government, financial, and medical based economies, there is an opportunity to diversify the focus from “traditional” manufacturing based industrial parks to also include to logistics related industrial spaces such as high-tech industrial/offices from bioscience, medical and information technology businesses to meet future demands. There will be continued development of business parks that accommodate office, commercial, warehousing and industrial uses.

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<sup>10</sup> West Virginia Forward. Creating an inventory of sites ready for development. West Virginia University. [Downloaded 2.6.23.](#)

<sup>11</sup> Deskins, J. and Lego, B. (2023) The Eastern Panhandle Economic Outlook, 2023 – 2027. WVU Bureau of Business & Economic Research

<sup>12</sup> Borges Marques dos Santos, P. (2018). Moving at the Speed of Business. West Virginia Forward (WV Forward)

TABLE 8: INDUSTRIAL PARKS, SITES, AND BUILDINGS IN BERKELEY COUNTY

No.	Type	Name	City	Total Acres	Available Acres
1	Park	Tabler Station Logistics Park	Martinsburg	148.7	
2	Park	Tabler Station Business Park	Martinsburg	687	218
3	Park	Mid-Atlantic I-81 Logistics Park	Martinsburg	150	
4	Park	Liberty Business Park	Martinsburg	146	50
5	Park	John D. Rockefeller IV Science & Technology Park (South)	Martinsburg	148.78	96.45
6	Park	John D. Rockefeller IV Science & Technology Park (North)	Martinsburg	75.57	75.57
7	Park	Cumbo Yard Industrial Park	Martinsburg	630	208
8	Site	Willis Site	Martinsburg	40.24	
9	Site	Tabler Station Road Site	Inwood	256.6	
10	Site	Tabler Station Road & Harold Drive Site	Inwood	30.55	
11	Site	Silver Property Portfolio	Inwood	420	400
12	Site	Shockey Commerce Center Site	Martinsburg	76	
13	Site	Shockey Business Center Site at I-18 Exit 16	Martinsburg	185.7	185.7
14	Site	Shirley Farm Route 11 Site	Ridgeway	187	187
15	Site	Route 9 Properties Site	Martinsburg	168	
16	Site	Potomac River Works	Martinsburg	1200	
17	Site	Pilgrim Street Site	Inwood	140	
18	Site	Oates Farm Site	Hedgesville	530	509
19	Site	Novak Drive Site	Martinsburg	122.44	122.44
20	Site	NE Quadrant Intersection of I-18 and WV Route 51 Site	Inwood	50	
21	Site	Horner Farm	Martinsburg	42	42
22	Site	Falling Waters Business Center	Martinsburg	74	14
23	Site	Bender Fulton	Martinsburg	69.8	69.36
24	Site	BCDA Station Square	Martinsburg	20.3	
25	Building	MRB South	Martinsburg	1.05	
26	Building	Martinsburg Logistics Center	Martinsburg	62	
27	Building	Carlton Drive Warehouse	Inwood	5	

28	Building	2018 Tabler Station LLC	Inwood	20	
29	Building	10612 Apple Harvest Drive Buildings	Martinsburg	38	

Source: West Virginia Economic Development, Sites & Buildings

TABLE 9: INDUSTRIAL PARKS, SITES, AND BUILDINGS IN JEFFERSON COUNTY

No.	Type	Name	City	Total Acres	Available Acres
1	Park	Burr Business Park	Kearneysville	460	115
2	Park	Sunnyside Business Park	Charles Town	100	100
3	Site	Route 340 Bypass Site	Charles Town	60	60
4	Site	Old Standard Site	Harpers Ferry	407	
5	Site	Jefferson Orchards Site	Ranson	421.48	421.48
6	Site	Harpers Ferry Site	Harpers Ferry	47	36
7	Site	FO Day Site	Kearneysville	308.53	308.53
8	Site	Charles Town Properties Site	Charles Town	1805	600
9	Site	Boyd-Rinker Site	Halltown	51.47	50.47
10	Site	Blackford Village Site	Ranson	49.5	49.5
11	Site	Miller Property	Ranson	192	192
12	Building	Washington Building	Kearneysville	1.1	
13	Building	Epic at Burr Business Park	Kearneysville	1.35	

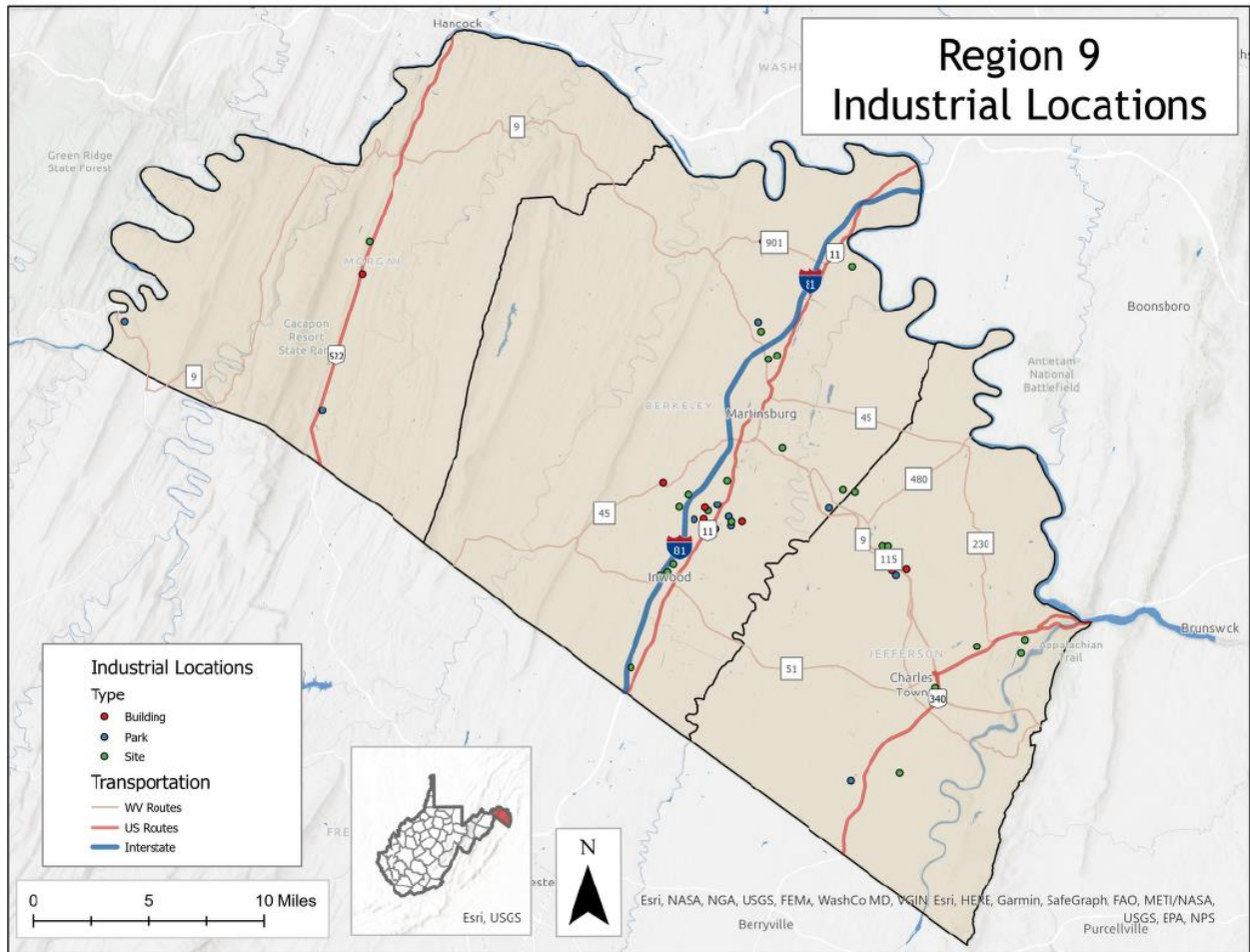
Sources: West Virginia Economic Development, Sites & Buildings; Jefferson County Development Authority

TABLE 10: PARKS, SITES, AND BUILDINGS IN MORGAN COUNTY

No.	Type	Name	City	Total Acres	Available Acres
1	Park	Robert C. Byrd Industrial Park	Paw Paw	30	12.25
2	Park	522 Business Park	Berkeley Springs	142	57.7
3	Site	Shirley Farms West Site	Berkeley Springs	63.7	
4	Building	Dawson's/Ace Hardware Multi-Tenant Building	Berkeley Springs	10	

Source: West Virginia Economic Development, Sites & Buildings; Morgan County Development Authority

FIGURE 2: BUSINESS/INDUSTRIAL SITES IN REGION 9



Source: Hagerstown Eastern Panhandle Metropolitan Planning Organization (HEPMPO)

## Airports

### Significance

Airports are important components to a regional economy, supporting domestic and international trade.

### Current Conditions

The Eastern Panhandle is served by the Eastern West Virginia Regional Airport (EWVRA), a public use airport located in Berkeley County, West Virginia that also serves as the home for the 167<sup>th</sup> Airlift Wing of the West Virginia National Guard. Through a joint use agreement, the 167<sup>th</sup> Airlift Wing runs operations out of the facility, and leases space including hangar facilities to store an 8-aircraft squadron. The airport is classified as a regional general aviation reliever airport by the West Virginia Department of Transportation, and provides general aviation services, such as charter flights and aviation aircraft maintenance, for both public and private entities. Although the airport is not served by commercial passenger air service, the airport provides general commercial services such as a flight school, maintenance facility, and charter flight services. It has one 9,615-foot runway.



*2022 Eastern West Virginia Regional Airport Promotional Video with Drone Footage*

With the ability to handle the largest transport aircraft, the airport could be used to transport the goods that are produced in the region to areas all over the world in a relatively short time frame. In addition, access to an airport would serve as a positive feature when attracting business and industry to the region. With the region's large federal presence, the airport can be used to transport federal officials and contractors directly to the region instead of to one of the airports in Baltimore or Washington, D.C. This airport can provide for future growth by providing passenger service to and from the region and transportation of goods to and from the region. Using the airport, Region 9 can become a major transportation hub.

### Trends and Future Needs

The Eastern West Virginia Regional Airport Authority (EWRVRAA) adopted its [Master Plan and Airport Layout \(ALP\) 2036](#) in April 2019. The purpose of the Master Plan and ALP for the Eastern West Virginia Regional Airport (MRB) is to provide the EWRVRAA, the City of Martinsburg, and Berkeley County with useful, understandable information and guidance in order to develop and maintain a safe and efficient airport. The ALP provides the Federal Aviation Administration (FAA),

the West Virginia Aeronautics Commission (WVAC), the EWVRAA, and other key stakeholders with information concerning planned development at MRB. This document presents the results of data collection, forecasts, an alternative development analysis, and recommendations for continued development of MRB through the year 2036. The Eastern West Virginia Regional Airport was identified in the CEDS SWOT as a development opportunity, with stakeholders commenting that it is the most under-utilized asset in the region.

### **Strategic Findings**

The Airport has four areas of focus to achieve their vision:

1. Financial
  - a. Strengthen Financial Health, Enhance Fiscal Management, Capitalize on Existing Regional Assets
2. Customers & Community
  - a. Grow General Aviation and Air Cargo Business, Improve Political/Legislative Relationships, Improve Regional Perception and Brand, Maximize Regional Economic Impact
3. Operations/Process
  - a. Explore Emerging Technologies, Provide for the Timely and Cost-Effective Delivery of Facility Improvements and Expansion, Optimize FBO Services and Facilities Workforce, Attract and Retain Highly Talented and Diverse
4. Workforce
  - a. Enhance Training and Development, Maintain Organizational Effectiveness

### **Ground Transportation**

#### **Significance**

A West Virginia University report by their Bureau of Business & Economic Research (BBER) relies on commuting patterns as a means of organizing counties into economic regions for the county forecasting program. Rather than treating each county as an isolated economic entity, this framework recognizes that economic and demographic changes in one county can influence its neighbors. This concept is relevant to local government and public service agencies, as well.



*I-81 Mile 0.0 Welcome to West Virginia, Berkeley County*



### Current Conditions

The Eastern Panhandle is represented by the Hagerstown Eastern Panhandle Metropolitan Planning Organization (HEPMPO). Region 9 has access to major roadways and interstates that provide a way to transport goods to and from the region. These major roadways and interstates are another significant strength for the region, which in turn present significant economic development opportunities. From an interstate perspective, Region 9 has direct connection to Interstate 81 (I-81), which runs north and south from New York to Tennessee and access to Interstate 70 along the northern border. This major transportation presence makes the region accessible by automotive transport from nearly any area in the United States. In addition, the region is connected by major roadways to Maryland, Virginia, Pennsylvania, and Washington, D.C. Unlike many areas in West Virginia, most of the region is easily accessible by major roadways. This strength must be used as a marketing tool when attracting business and industry to the region.

### Trends and Future Needs



*HEPMPO Direction 2050 - Long Range Transportation Plan*

West Virginia is expected to receive more than \$3.7 billion in federal funding over the next five years as part of the Infrastructure Investment and Jobs Act, (IIJA), signed into law by President Joe Biden in November 2021. The money will allow the Mountain State to make unprecedented investments in its highway and bridge systems, improve the ability of its citizens to get around and expand interstate and intrastate transportation and communication opportunities.

Focus areas will include bridge programs; paving and road maintenance; traffic improvements including guardrails, traffic lights, signage and lighting; transit expenses such as expanding bus service and rail transport, new vehicles, equipment and infrastructure; local and regional mobility projects like local road upgrades and construction of major transportation corridors; and community development and connectivity projects like ADA ramps, recreational trails and carbon reduction.

The West Virginia Department of Transportation (WVDOT) has incorporated IIJA funding into its 2023 - 2028 Statewide Transportation Improvement Program, or STIP, which outlines state transportation infrastructure spending for the next five years.

The HEPMPO adopted its Long-Range Transportation Plan (LRTP) in May 2022. The LRTP identifies how the region intends to invest in the transportation system. Federal law requires the plan, “include both long-range and short-range program strategies/actions that lead to the development of an integrated intermodal transportation system that facilitates the efficient

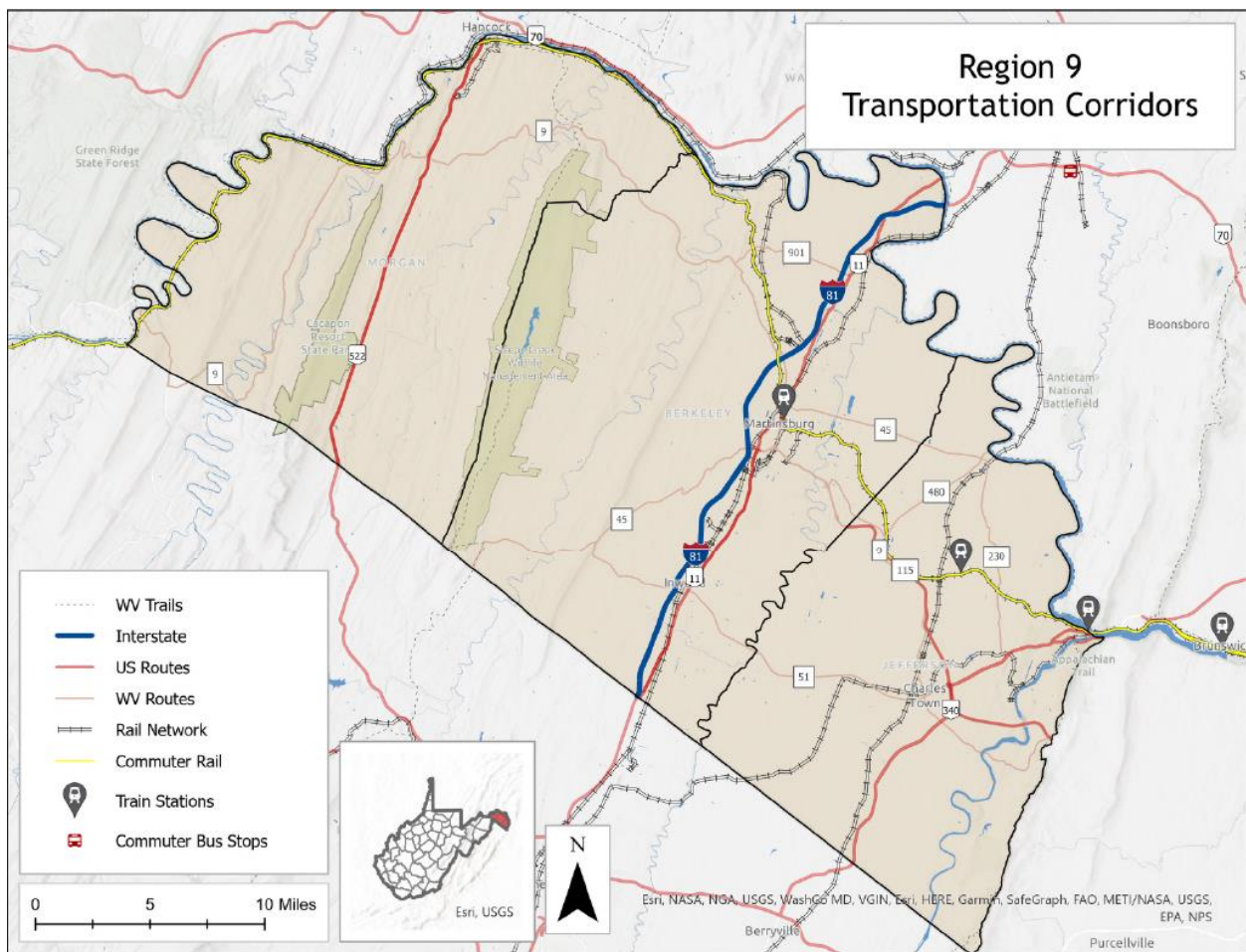
movement of people and goods.” It along with other plans and studies which have identified transportation related trends and needs can be found at [www.hepmo.net/documents](http://www.hepmo.net/documents)

Interstate 81 is projected to have increased freight volume along its corridor for the next several years, continuous improvements and expansions will need to be made during this time.

**Strategic Direction**

Region 9 will provide support where needed to the HEPMPO, who will be the lead organization for most transportation related project in Berkeley and Jefferson County.

FIGURE 3: TRANSPORTATION CORRIDORS IN REGION 9



Source: Hagerstown Eastern Panhandle Metropolitan Planning Organization (HEPMPO)

**Drinking Water, Wastewater, and Stormwater  
 Significance**

As the Region’s population continues to grow, opportunities for the development of an increasingly diverse labor force and globally competitive business environment are directly connected to its ability to protect and retain an essential natural resource, Water.



*The Point at Harpers Ferry, West Virginia*

**Current Conditions**

The Eastern Panhandle is served by the following water and sewer utilities:

- Berkeley County Public Service Water District
- Berkeley County Public Service Sewer District
- City of Martinsburg Water and Sewer Dept.
- Harpers Ferry Water Works
- Jefferson County Public Service District
- Charles Town Water and Sewer Utility Board
- West Virginia American Water
- Berkeley Springs Water Works
- Paw Paw Municipal Water Works
- Warm Springs Public Service District
- Paw Paw Sewer System
- Private wells and private septic systems

The City of Martinsburg and Berkeley County Public Service Sewer District are the only Municipal Separate Storm Sewer System (MS4) Permit holders in the region and are responsible for developing and implementing a stormwater management program and plan. The Berkeley County Public Service Stormwater District was launched in 2019, while the City of Martinsburg successfully launched its stormwater program in 2023.



*Warm Springs, West Virginia Public Service District*

**Trends and Future Needs**

The State of West Virginia requires all public drinking water suppliers and utilities to develop and implement Source Water Protection Plans. These utilities may need additional resources to implement strategies in these plans.

Within the Source Water Protection Plans, one reoccurring strategy within the region is the need to provide expand sanitary service to areas with failing septic systems. In some circumstances, the underlying limestone geology, also known as Karst, found within the Eastern Panhandle allows effluent to enter our groundwater via dissolved conduits within the bedrock. Sanitary utilities must be aware of all and new financing and funding opportunities to provide quality service at reasonable rates. Finally, as the region continues to

grow, the sanitary boards must also be mindful of how to achieve their current wasteload allocation (WLA) as their plants begin receiving higher incoming flows.

Growth trends of the City of Charles Town and the City of Ranson are both leading up to a population density threshold considered a Census Urbanized Area. With this designation also comes a possible MS4 permit designation and upheld by the Clean Water Act. These communities will need to continue to review their options based on the latest decennial census.

**Strategic Findings**

The preservation of our water resources will not only benefit our existing businesses but will serve as an assurance to new companies looking to invest in West Virginia and the Eastern Panhandle that their water demands for production will be reliable and clean.



*Potomac River at Harpers Ferry, West Virginia*

The Eastern Panhandle lies within the Chesapeake Watershed. Other States in the Watershed have implemented trading scenarios that Region 9 utility districts and boards could model, allowing for options and alternatives to achieve their wasteload allocations (WLA).

Charles Town and Ranson can work with the Region 9 Environmental Program Coordinator to better understand how to manage the responsibility of an MS4 Permit hold in the years leading up to a possible designation.

Communication Network

**Significance**

Competitive Broadband and mobile speed are essential to attracting and retaining a variety of businesses and industries to the region and West Virginia.

**Current Conditions**

The Wireless Broadband Development Plans for each county can be found at [Broadband Plans \(region9wv.com\)](http://region9wv.com).

The state has appointed a Broadband Council The West Virginia Legislature designed the Council to represent diverse users of broadband, including residential and



*West Virginia Broadband Council*

business users, from various locations throughout the State. Detailed information can be found at <https://broadband.wv.gov>

### **Trends and Future Needs**

Fiber Optic lines can provide proper speeds needed for data centers. The region must continuously improve their communication network.

### **Strategic Findings/Policy Implications**

The region is rich with Information sector jobs and skills, and with proper broadband infrastructure, the Eastern Panhandle will compete with neighboring states in attracting high-tech companies.

## Electric and Energy

### **Significance**

Energy, particularly electricity and natural gas, is a basic and critical component of infrastructure that fuels economic development. Increased availability, diversity of energy sources, and reliability of energy provisions are key to increased economic productivity.

### **Current Conditions**

In the Eastern Panhandle current electrical service is provided by the First Energy Corporation electric companies *First Energy Corp.*, Mon Power and Potomac Edison.

Current gas service is provided by Mountaineer Gas Company, Blueflame, Inc., and Thompson Gas.

Proposed in 2017, the Mountaineer Gas Pipeline is a three-phase pipeline in Virginia, West Virginia and Maryland. Phase I would have been 27.5 miles long, from Berkely, VA to Martinsburg, WV; Phase II would have added a 24.5-mile loop around Charleston, WV, and Phase III, the Eastern Panhandle Expansion Project, also called the Potomac Pipeline<sup>13</sup>, would have added 4.4 miles, connecting a gas line from Pennsylvania to West Virginia and would have run under the Potomac River between Berkeley Springs, WV and the border between Maryland and Pennsylvania, near Hancock, MD. Since West Virginia does not own the Potomac River, the State of Maryland and the National Park Service would need to issue permits to allow construction and operation. The project is currently on-hold as of April 2021.

Along with electric and gas, there are several private renewable energy consultants and installation experts in the region.

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<sup>13</sup> Mountaineer Gas Pipeline (2022, October 9). In *Wikipedia*. [Mountaineer Gas Pipeline - Global Energy Monitor \(gem.wiki\)](https://gem.wiki)

### Trends and Future Needs

The Mountaineer Gas pipeline continues to be stalled due to local opposition and there has been no indication of construction activity since the project was first proposed. However, the Maryland Department of the Environment extended the period in which construction must begin from August 2023 to March 2025.<sup>14</sup> If such a project ever does become operational, existing businesses may need to gain an understanding of how to gain access and methods on converting their existing systems to a natural gas fuel. Emergency services may need training on responding to natural gas related calls.

Energy Efficiency programs improve utility system reliability and promote local economic development, energy affordability, and resilience.

### Strategic Findings

The continued support of the development of energy diversity and redundancy will establish resiliency in the Eastern Panhandle.

## Solid Waste

### Significance

The management of waste streams are critical to quality of life and economic development, as open dumps and roadside litter can present a strain on natural resources. Landfill capacity could limit disposal options for industry operations.

### Current Conditions

Curbside pickup is provided by the municipal corporations or by other private businesses outside the corporate boundaries. Currently, there are three landfills that receive municipal solid waste (MSW). The LCS Services landfill in Berkeley County, north of Hedgesville is one disposal point for Berkeley County generated MSW. Private haulers also transport MSW to landfills in nearby Pennsylvania.



*Berkeley County, WV Solid Waste Authority*

While some Municipalities and private haulers provide curbside recycling, there are several recycling transfer centers located throughout the region: three in Berkeley County 1.) South Berkeley Pilgrim Street 2.) Martinsburg Grapevine Road, 3.) Hedgesville Eagle Plaza; one in

<sup>14</sup> Ibid., 13

Jefferson County - Jefferson Orchard Rd Kearneysville; and one in Morgan County - The Charles R. Biggs Recycling Center located approximately three miles south of Bath on US 522.

The Rehabilitation Environmental Action Plan (REAP) operates a statewide litter collection program involving the public called Adopt-A-Highway. The program allows groups to voluntarily agree to collect litter in 2–3-mile increments of any road within the county twice per year.



*EntSORGA Mixed Waste Processing Resource Recovery Facility, Berkeley County, West Virginia*

reuse the site to reduce the amount of trash going to landfills, which emit major greenhouse gases and can pollute waterways.

### **Trends and Future Needs**

The County Solid Waste Authorities routinely conduct Comprehensive Litter and Solid Waste Plans. These plans highlight many trends and needs in the County and region as a whole.

Current growth trends and future land use patterns have been making it more difficult to site new or expand existing landfills. With the recent closure of the EntSORGA Mixed Waste Processing Resource Recovery Facility in 2022, there is an opportunity for local authorities to

### **Strategic Findings**

Region 9 will assist, when feasible, with implementing strategies in the county comprehensive plans:

- ✓ Berkeley County Solid Waste Authority Comprehensive Litter and Solid Waste Control Plan
- ✓ Jefferson County Solid Waste Authority Comprehensive Litter and Solid Waste Plan



**Eastern Panhandle Planning and Regional Development Council (Region 9)**

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