

GARRETT COUNTY ECONOMIC DEVELOPMENT STRATEGIC PLAN

2023-2027



LETTER FROM THE DIRECTOR

VISION

**Economic Vision 2025
Garrett County will be:**

1. Known as a growing, thriving, rural community with successful farms and businesses, vibrant towns, and user-friendly public parks and forests;
2. A rural leader in environmentally and socially sustainable growth; and
3. Will have an economy that includes diverse types and sizes of businesses, with increasing wages.



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The Garrett County, Maryland Economic Development Strategic Planning effort was led by Meredith Mears, Principal of M3 Synergies, a business, economic and community development firm.



Data and research support for this project was provided by Dr. Sarah Guy, Principal of SG Insights, LLC. SG Insights is a comprehensive research and consulting firm.



SG Insights, LLC

FOREWARD

This Economic Development 5-Year Strategic Plan is written in conjunction with the Garrett County community - residents, business owners, industry leaders and County staff. Through facilitated, integrated discussion, occurring over a period of several months in 2022, it is very clear that this is a community that values its quality of life above all.

Garrett County is known for its lush landscape of mountains, streams and farmland, presenting a four-season destination for vacationers wishing to escape to a quieter location and a slower pace of life. Over the last several years, in the face of COVID-19 and several variants of the virus occurring thereafter, the County realized a boom in its tourism and housing economies. Not only did tourists increase their demand for vacationing in the area, but they also decided to locate to the County in a more permanent manner, bringing their purchasing power with them.

As a result, long-term community residents that were in the market to buy a home began to see stark competition in the housing market. Newer residents entered the market with plenty of cash in hand and offered above asking price on many homes, crowding out buyers that would normally be able to compete. This puts a strain on an already strained housing inventory, and public perception is that a good number of residents have been forced to locate outside of the County because of this. During public information sessions, the public indicated concern that more people may move outside of the County in the coming years if accessible and affordable workforce housing inventories remain low or unavailable. In addition, the lake area of the County has seen a stark uptick of high-dollar housing starts, creating a “tale of two cities” within the County - and a divide among what may be considered working class residents, and those who have located in the County to retire, or to simply pursue a more leisurely lifestyle. This can be seen through an 86% increase in median sales price between 2016 and 2020 coupled with an 88% decrease in median days on market. Housing inventory of owner-occupied units valued under \$200K have decreased between 2016 and 2021 while units valued between \$200K and \$500K have increased. Median household income in the County remains well below that of Maryland, reaching just over \$54,500 in 2020.

It is no secret that County demographics have moved increasingly towards an aging population, as the number of children living in the

ECONOMIC DEVELOPMENT WILL SUPPORT:

Established businesses and industries that are already an integral part of the Garrett County economy.



Agriculture



Tourism



Healthcare



Manufacturing

Entrepreneurship & development of small community businesses



Attraction & retention of younger residents & families



Workforce development & workforce pipeline



FOREWARD

County has decreased consistently year over year. This is very evident in the number of school consolidations and closures that have occurred simply because there are not enough children to substantiate keeping some school facilities open. Between 2011 and 2022, school enrollment decreased overall by 16%. The greatest decrease in enrollment was experienced in middle school grades 6 through 8 with a decrease in enrollment of 20%. Maryland Department of Planning projects a 3% decline in overall school enrollment in Garrett County between 2022 and 2031 with a modest increase (1%) in enrollment in elementary school (grades K through 5), no growth in middle school, and a decline in high school enrollment of 10%.

In addition, the County’s agricultural base is in transition. Family farms that have been passed down for generations have, over time, been divided up among family members and sold, leaving, in many cases, small tracts of land to farm that don’t produce enough product and income to make a living. Economies of scale are at play in these scenarios, and many families that are faced with this reality have taken “day-jobs” to make ends meet. From 2007 to 2017, median farm size has decreased by 27%, with a median farm size of 75 acres in 2017. New methods of farming, and integration of agri-tech initiatives must be employed for this sector to survive, and once again thrive.

With an eye to the future, this plan addresses current economic issues and provides steps forward to removing barriers and realizing opportunities. Taking the broad view of supporting, attracting and retaining businesses for the purpose of creating jobs and expanding the revenue base for the County is the work of economic development initiatives. Within this plan, direction and a path forward on the most prominent opportunities and barriers are addressed, with firm recommendation that resources (financial and otherwise) become focused on these areas, serving the businesses and citizens of Garrett County.

We note that this Plan is a roadmap for the direction that the County should take. There is much work to follow this plan in order for barriers to be removed and opportunities to be realized. The planning horizon of five years allows for flexibility to shift Economic Development’s focus to considerations that make the best sense in the moment for the County, its businesses and citizens.

ECONOMIC DEVELOPMENT WILL SUPPORT:

Small Towns, the heart of the community, through:



Equity & inclusion efforts



Targeted housing initiatives



Workforce Development initiatives

Balancing economic growth through new, targeted industry growth



Historical & cultural tourism development opportunities



STAKEHOLDERS & PARTNERS

Business support and resource sharing is the cornerstone of the Garrett County Department of Business Development.

Many of the actions and objectives needed to reach the strategic goals will be facilitated by the Garrett County Department of Business Development, working in conjunction with subject matter experts and programmatic partners as listed below.

Because of this, the Five-Year Economic Development Strategic Plan was created in conjunction with the partners listed below:

MUNICIPAL PARTNERS

Mayor and Town of Accident
Mayor and Town of Deer Park
Mayor and Town of Friendsville
Mayor and Town of Grantsville
Mayor and Town of Kitzmiller
Mayor and Town of Loch Lynn Heights
Mayor and Town of Mountain Lake Park
Mayor and Town of Oakland

GOVERNMENT PARTNERS

Garrett County Department of Business Development
Board of County Commissioners of Garrett County, Maryland

COMMUNITY PARTNERS

Garrett College
Garrett County Chamber of Commerce
Garrett County Community Action Committee, Inc.
Garrett County Development Corporation, Inc.
Garrett County Public Schools
Greater Friendsville Business Association
Greater Grantsville Business Association
Greater Oakland Business Association

The Garrett County Department of Business Development and the Garrett County Commissioners thank these partners for their input and continued service.

FRAMEWORK

Investment in economic development addresses many issues that businesses deal with - capital needs, workforce needs and infrastructure development. Capital needs are supported through partnership with private lenders and state and federal partners through incentives. Workforce and childcare needs are supported through community partnerships that provide resources and results for both businesses and workers. Infrastructure needs are traditionally addressed by state, county and municipal investment.

HOW ECONOMIC ACTIVITY IS MEASURED



JOB
CREATION



GROSS
DOMESTIC PRODUCT



NUMBER OF
ESTABLISHMENTS



COUNTY
REVENUE



POST-COVID ECONOMY

The Garrett County economy saw a huge boost during the COVID19 pandemic. The tourism industry in the County experienced tremendous growth as a result of people fleeing crowded city-scapes in search of more serene, nature-filled landscapes. This transition continues today, in the post-COVID economy as many of those visitors have chosen to move their families to the area for long term stays. Visitors, now residents, have brought their buying power with them - often times paying well over asking price for housing stock, and capitalizing on housing opportunities that long-term residents cannot afford.

Public discussions have revealed that residents perceive this has caused many young families to seek housing outside of the County, where there is more stock and more affordability. As young families seek housing outside of the County, dwindling enrollment numbers occur and school closures increase. Additional contributing factors to school closures can include individuals not getting married or getting married later in life and either not having children or having fewer children. Aging schools and insufficient funding available to repair and/or replace them can also be considered a significant factor.



LESSONS LEARNED:

1

Workforce & work culture can be agile and flexible in operational culture

2

COVID gave the economy a boost - tourism & more high dollar homes

3

Housing stock must be shored-up/increased

4

The amenities visitors enjoy must also be accessible to resident youth

5

Career Pipelines must be established & actively managed

DATA

Data provides decision makers with the tools necessary to identify problems and solutions, to outline gaps in understanding or situational analyses, and to offer evaluations toward desired outcomes. The following are common data sets that assist in painting a broad picture of Garrett County socio-economic factors: land use, demographic, housing, workforce, and industry data. Summaries and highlights of the data sets utilized in developing this report can be found in Appendix A: Detailed Data.

For specific decision making on the tactics identified in this Plan, additional data sets may need to be curated that provide granular and timely information. Each data set identified below can be gathered and analyzed as separate tasks outside of the strategic planning effort to serve the overarching goals of the Plan:

Inventory of affordable housing/workforce housing
Agricultural impact data
Commercial tax base
Detailed land use data
Local tourism data
Measure of housing investment over the last 5 years

GOALS PERFORMANCE METRICS/MEASUREMENT

How do we measure progress over time?

Regular monitoring of outcomes measures relevant to each of the strategic planning objectives is integral to tracking progress. Outcome measures, when properly developed, will allow the County to see the results and measurable differences in the identified areas of interest. There are a number of economic development outcome measures that are worthy of regular monitoring whether objective-specific or not. Some of these factors include:

Job creation
Job retention
Housing starts
Affordable housing inventory
Number of business establishments, gains, and losses
County tax revenue by source

SITUATIONAL ANALYSIS

The Economic Development discipline typically utilizes a Strengths-Weaknesses-Opportunities-Threats (SWOT) Analysis to identify areas of focus and change for economies. Given the fluid nature of the Garrett County economy in post-COVID times, the SWOT analysis is replaced by a Situational Analysis for this planning effort.

Situational Analyses are observations on trends and conditions that influence decision makers on policies, programs, and projects that support businesses and workers in the County. The list is not prioritized. The Situational Analysis is not static as dynamics of each situation can support or pressure the County's economy. The actions noted are not all inclusive, but highlight steps that Economic Development and its partners can take to improve the situation or mitigate the risks.

Garrett County is a community that is thriving in many areas, yet it is seeing very real challenges in others. The County has a plethora of opportunities for well-managed, well-planned growth, as well as opportunities for cohesive community integration that will provide a solid foundation for this impending growth. The County has a variety of barriers that need to be addressed and/or removed in order to realize healthy growth. At the crux of this foundation is a community that has demonstrated appreciation, care and concern about the current status and the future economy of their home, and with that - *"all things are possible."*



SITUATIONAL ANALYSIS

Barriers

Over the next five years, and conceivably beyond, it is and will be increasingly important for leadership to proactively address:

1. Undesired workforce shortages (see Workforce Development Pipeline below)
2. Imbalanced community dynamics whereby long-term residents and new residents feel a divide with regard to lifestyles and amenities access (see Equity and Inclusion below) and whereby demographics present low and project even lower numbers of young residents and workers (see Workforce Shortages below).
3. Unavailable workforce housing stock due to lack of new home inventory and lack of sufficient living conditions in existing home inventory. (see Housing Initiatives below)
4. Access to and awareness of resources and support for innovation, commercialization, and expansion of key industries and support industries

Opportunities

Initiatives put into place that will address these barriers will:

1. Create consensus around what can be agreed upon as the top industries in Garrett County. Establish a marketing plan and strategy to position the County as a leader in those industries. Industries that repeatedly surfaced in public and staff discussions were identified as:
 - a. Tourism
 - b. Healthcare
 - c. Manufacturing
 - d. Agriculture
2. Support and grow industry bases of tourism, healthcare, manufacturing and agriculture through:
 - a. Actively working to address workforce shortages, access to public funding and programs, and limited knowledge of work opportunities that exist in the following populations:
 - i. Workers interested in preserving farm family way of life, and
 - ii. Workers interested in agri-tourism and agri-tech/automation opportunities.
 - iii. Workers that desire to work within Garrett County, but aren't aware of the companies and jobs that exist.
 - iv. Youth interested in accessing tourism-centered amenities existing in community; youth interested in working at tourism-centered businesses existing in the community.
 - v. Workers interested in work opportunities stemming from development at or around the Lake area.
 - b. Address workforce shortages through development of specific workforce pipeline stemming from school enrollment in middle-school through advanced degree.
3. Create incentives to attract businesses within these industries to Garrett County utilizing Federal, State and Local funds and policy. Ensure staff is allocated to promote these incentives and operationalize them when the time comes.
4. Increase workforce housing stock through addition of new homes and renovation of existing homes. Develop a public/private partnership to ensure stock is produced and available.
5. Actively engage in Maryland Department of Commerce Initiatives that support the growth of the childcare center base in the state.

SITUATIONAL ANALYSIS

Situation

Analysis

Action

General workforce shortages

The United States is experiencing a workforce shortage. While not unique to Garrett County, the issues stemming from it should be addressed.

- Create a centralized workforce development initiative/pipeline
- Ensure resident youth have access to workforce development programs across key industries
- Incorporate technology and automation into workforce development training programs
- Create a business eco-system to support remote workers

Equity & Inclusion is needed to shore up the workforce

There exists a “tale of two cities” in Garrett County, a divide in the “come here’s” and “from here’s.” The County is at risk of losing more youth in the long-term because of this.

- Create a centralized workforce development initiative/pipeline
- Ensure resident youth have access to tourism-related amenities
- Ensure all workforce participants have equal access to employment opportunities stemming from development at and around the Lake
- Ensure the County provides a welcoming environment to in-migrates

Imbalanced community dynamics (i.e. aging population)

Elementary schools are closing and consolidating. Small towns are losing momentum. The population is aging.

- This is a side-effect of the issues identified in this report.
- The solutions/actions are found in addressing workforce housing, workforce shortages, and equity/inclusion.

Workforce housing is in short supply

Inventory of affordable, livable homes is very low. Inventory of long-term rental homes is low to non-existent. The inventory of new homes is not accessible to long-term residents due to pricing.

- Expand first time homebuyer programs and home rehabilitation programs
- Provide incentives such as impact fee reimbursement programs for homebuilders in which reimbursement only occurs once homes are occupied and providing a perpetual tax base increase for the County.

SITUATIONAL ANALYSIS

Situation

Analysis

Action

Imbalanced Economic Foundation

The County has seen an influx of economic activity through the tourism and hospitality industry. Agriculture, manufacturing, and healthcare represent three other predominant industries that should be shored up.

- Identify and grow supportive industries for key economic sectors
- Develop targeted business recruitment and expansion efforts
- Reduce barriers to entry
- Increase support and access to the resources necessary for industry growth
- Seek solutions through public/private partnerships



FOCUS AREAS

Economic development strategic action plans are listed below and align with the highest and best use of County resources. The focus areas reflect the community's desire for preservation of natural resources, available housing stock and controlled growth. Each area has an overarching situation that has been identified through community discussions, from which projects, programs and initiatives will form over the next five years.

OBJECTIVE PREPARE THE CURRENT AND EMERGING WORKFORCE TO MEET THE NEEDS OF LOCAL INDUSTRY NOW AND INTO THE FUTURE.



Organization and Implementation of Workforce Development Pipeline

A trained and trainable workforce is necessary for the long-term success of all industries within the County. As such, career pipelines should be organized and implemented to support existing and developing industries. A multi-faceted approach that engages and educates County residents as early as middle school is recommended. Where feasible, this may include the exploration of awareness-building campaigns, additional internship and externship opportunities, and tailored hands-on educational and workforce development

training opportunities for both entry-level and incumbent workers.

It has become increasingly important to engage youth in the County in education about the companies and jobs available to them within their community. These students should be approached and educated on the types of careers opportunities present in the County, provided assistance with matching skills and interest with jobs, and informed about local pay scales and how those measure against the local cost of living as compared to other counties and states competing for their workforce participation.

ACTION

Ensure resident youth have access to training and education programs that prepare them for the workforce and meet the existing and future needs of local industry.

FOCUS AREAS

For those already in the workforce, long-term workforce development programs can bridge the training gap that exists between the skills of the workforce and the needs of industry. Workforce pipeline information should be tracked beginning with middle-school enrollment information and should extend through advanced degree programs that may exist in the County. Workforce training opportunities should be reviewed, revised, and further developed to meet the current and future needs of industry. Reliance on technology and automation is growing and will continue to do so as the last of the baby boomer generation leaves the workforce without sufficient numbers in subsequent generations to replace them all. Technology can also increase the productivity of the available workforce and should be used as a resource to strengthen existing industries, such as manufacturing and agriculture. Public private partnerships to enable opportunities for innovation, resource sharing, and support for commercialization should be explored (see Page 19).

Garrett County is presented with a unique opportunity that has grown through the COVID-19 pandemic, a growing base of remote workers. This workforce initiative should identify and engage remote workers to offer them opportunities to network, grow, and create a sense of community within the County. If the County can successfully integrate this segment of the workforce into the fabric of the community, there is potential for these workers to establish new businesses within the County or expand their existing operations to Garrett County. Supporting the influx of remote workers provides a more grassroots approach to business development while supporting new resident retention.

Population
Change

-1.8%
2016-2020

46.8 Years
Median Age

4.9 Years
Since
2010

ACTIONS

Create a centralized workforce development initiative. Incorporate technology and automation into workforce development training programs. Create a business ecosystem to support remote workers.



FOCUS AREAS

Addressing Workforce Barriers

Reducing and removing barriers to employment will bolster the success of workforce development initiatives. Two key barriers were identified through the public and industry focus groups: transportation and childcare. With limited public transportation in more rural areas, access to reliable individual transportation is critical. However, there is an increasing number of residents in the County that do not have a driver's license. This barrier can be reduced through increasing access to and affordability of the driver's education program required to obtain a license. While there are some agencies in the County working to address this, it is noted as a workforce development area of concern. The County should continue to focus on this issue, and the work that is being done to remove this barrier should continue to be well funded and coordinated between the appropriate departments.



Lastly, it is very apparent that Garrett County struggles with lack of child care resources for working mothers and families. This is an economic development issue in the sense that without adequate child care, workforce availability is impacted. Additionally, workforce participation is negatively impacted, which presents a whole host of economic indicators that point to the health, or lack thereof, of a local economy.

There is noted struggle in this realm at the State of Maryland level, as the Maryland Department of Commerce continues in a supportive role to the Maryland State Department of Education by providing funding through programs in place to assist in boosting child care offerings across the State. Most recently, the Maryland Department of Commerce established a Child Care Capital Support Fund¹ to offset the expenses incurred by child care center owners when establishing or growing their businesses.



ACTION Identify and address key barriers to workforce entry for Garrett County residents.

1. <https://commerce.maryland.gov/media/maryland-commerce-announces-applications-open-for-child-care-capital-support-fund>

FOCUS AREAS

ACTIONS

Ensure resident youth have access to tourism-related amenities. Ensure all workforce participants have equal access to employment opportunities stemming from development at and around the Lake. Ensure the County provides a welcoming environment to in-migrates.

Organization and Implementation of Equity and Inclusion Activities

Part of reinforcing a solid workforce involves efforts to ensure that opportunities are available to all workforce participants throughout the county and building a sense of community that incentivizes residents to remain and work in the county. For Garrett County this means ensuring that resident youth have access to community amenities made available through tourism related businesses. There is a clear divide among the community with regard to accessibility to and inclusivity in events and activities visitors enjoy. In order to instill a firm footing and a feeling of belonging for long-term resident youth, access to these services must be prioritized, organized, and shared.

All regions of the County must work cohesively to promote, protect, and grow the economy. Pursuit of economic development

opportunities must be a county-wide initiative without internal geographical boundaries. It is imperative that employment opportunities at and around the Lake area are accessible and available to residents throughout the County. Development around the lake area presents great opportunity for all segments of the workforce population, and there should be cohesive workforce development efforts to ensure residents are benefitting from the availability of employment opportunities.

In order to attract workforce participants from other counties, states, and countries Garrett County must promote an open and welcoming culture in all facets of community and business. Garrett County could benefit from an influx of immigrant workers to abate the workforce shortage. Efforts to reduce workforce entry barriers and housing obstacles and to provide appropriate support services to this segment of the workforce will need to be a coordinated effort among various County departments and other public and private partners.



FOCUS AREAS

OBJECTIVE

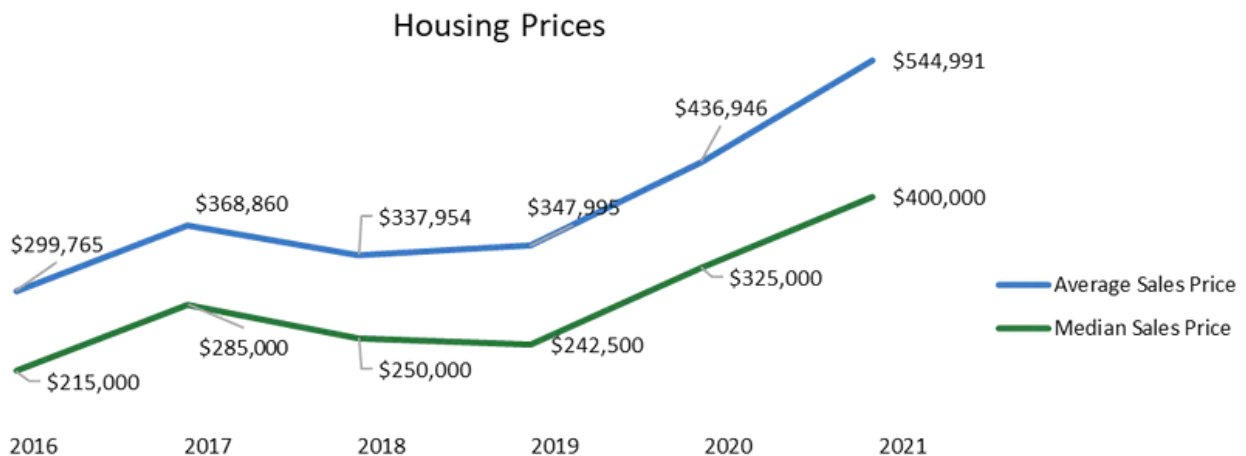
ENSURE AN ADEQUATE SUPPLY OF AFFORDABLE HOUSING TO RETAIN AND ATTRACT THE WORKFORCE NECESSARY TO SUPPORT THE COUNT ECONOMY.

Organization and Implementation of Specific Housing Initiatives

Given Garrett County's attractiveness as a place to live, it is no surprise that the County benefited from the metropolitan outmigration spurred by the COVID-19 pandemic. While there was a boon to the County through an increase in tourism and a significant increase in the demand for homes, the pressure this demand placed on house prices was detrimental to long-term residents. Between 2016 and 2021 the home prices in Garrett County rose significantly with an 86% increase in the median sales price over the five-year period. At the same time, median household income increased by only about 18%. This trend, coupled with the aging home inventory

in which a portion of the available affordable homes are falling out of compliance with current building code standards, presents significant challenges for the workforce. Businesses struggle to attract and retain workers if those workers are unable to find adequate and affordable housing solutions for themselves and their families.

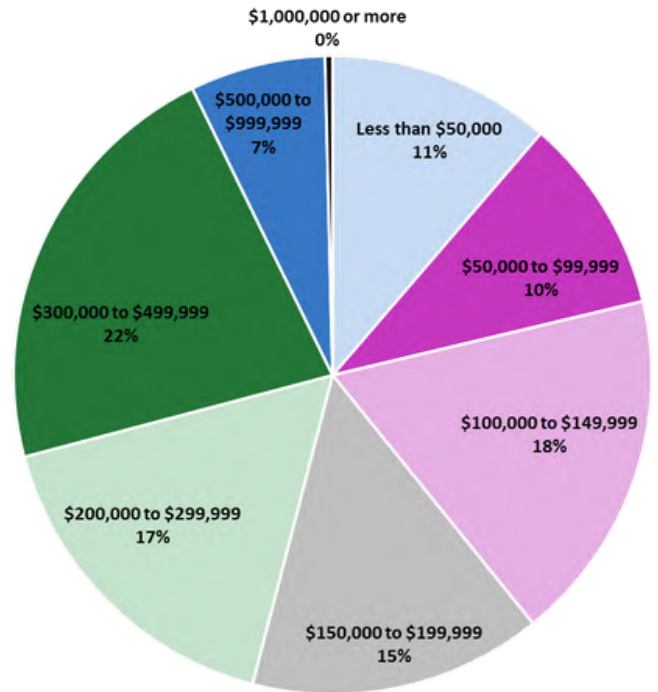
According to the State Department of Assessments and Taxation, the residential assessable tax base increase by 53.9% between 2020 and 2023, representing the highest increase among all 24 jurisdictions in Maryland. The increase in reassessments places a significant burden on existing homeowners who may now struggle to afford their property tax bill on an income which has not experienced comparable gains.



FOCUS AREAS

First-time homebuyer programs and home rehabilitation programs should be expanded to ensure long-term residents have access to housing stock. Otherwise, they will be continually forced to move from the County into other areas of the State - or to other competing States nearby. To facilitate the attraction and retention of new residents and workforce recruits, a public/private partnership geared towards establishing workforce housing stock should be explored. This can be done with a well-structured plan to identify and acquire land, to build the homes, and to provide adequate incentives to each party involved, including the new homeowners or renters.

Owner-Occupied Housing Units by Value, 2019



ACTIONS

Expand first time homebuyer programs and home rehabilitation programs. Provide incentives such as impact fee reimbursement programs for homebuilders in which reimbursement only occurs once homes are occupied and providing a tax base increase for the County.



FOCUS AREAS

OBJECTIVE ENSURE THE COUNTY'S ECONOMY IS BALANCED AND RESILIENT.

Strengthen the Economic Base

Increase support for key industries to ensure a well-balanced economy.

Agriculture, manufacturing, healthcare, and tourism represent the four pillars of Garrett County's economy. To ensure the long-term future success of the County, intentional efforts must be dedicated to supporting and bolstering these four sectors and ensuring a proper balance between them. While tourism represents a very strong, year-round economic driver for the County, this must be balanced with other sectors to maintain economic resiliency. Overreliance on any one or two sectors makes the County's economy vulnerable. Economic development should identify, prioritize, and grow the supportive industries for the top four economic sectors.

It is recommended that the County conduct a needs assessment to identify the supply chain

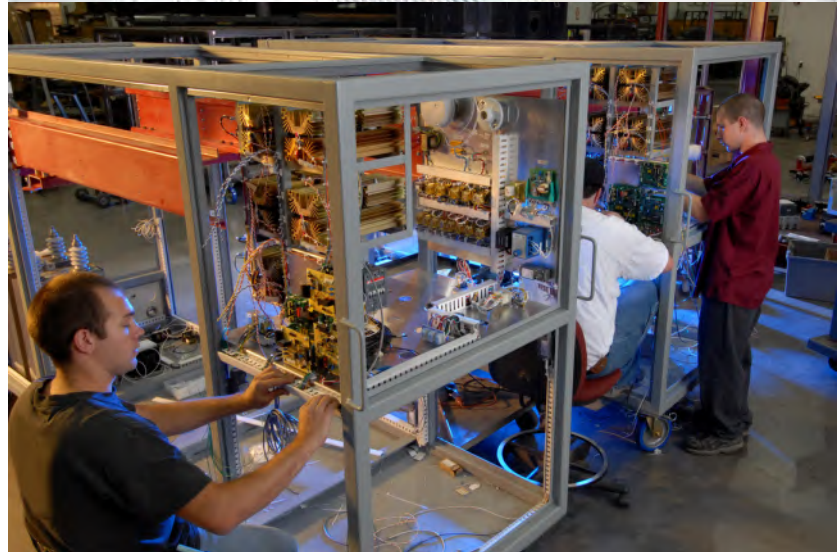
inputs of highest need and highest benefit to have located within the county (these could include human capital and/or goods and services), develop targeted recruitment or business development strategies to establish these support industries within the county, and identify appropriate incentives to encourage attraction and/or expansion. To make doing business in Garrett accessible for new and expanding businesses, the County should explore avenues for increasing access to capital and reducing barriers to entry. The County can support businesses seeking to expand their products and services by providing avenues through which they can share resources, access support for innovation and commercialization, and support new industry pilot projects. A repository of all available county, state, and federal resources should be developed to provide easy access to businesses seeking support.



FOCUS AREAS

Many creative ideas for support industry growth were provided throughout the public input sessions including a shared commercial kitchen space for agricultural value-added product preparation, biomass energy production, and makerspaces/incubators. A process should be developed for vetting all ideas for feasibility, sustainability, and scalability. Where appropriate, the County should investigate the feasibility and the suitability of public/private partnerships to enact such supportive measures.

Lastly, the County is encouraged to heavily market its HUBZone status, increasing marketing efforts to attract companies seeking HUBZone funding opportunities. Federal contract dollars are awarded to HUBZone companies, and these companies must establish operations in designated geographical areas - bringing their job opportunities and high-paying jobs with them.



ACTIONS

Identify and grow supportive industries for all four key economic sectors. Develop targeted business recruitment and expansion efforts. Reduce barriers to entry. Increase support and access to the resources necessary for industry growth. Seek solutions through public/private partnerships.

MEASURES

OBJECTIVE PREPARE THE CURRENT AND EMERGING WORKFORCE TO MEET THE NEEDS OF LOCAL INDUSTRY NOW AND INTO THE FUTURE.

OUTPUT

- Increase in targeted workforce training programs
- Reduced barriers to workforce entry
- Enhanced employment opportunities for all County residents

OUTCOME

- Increased trained workforce
- Reduced job vacancies
- Increased retention of graduates
- Enhanced business development
- Business growth

OBJECTIVE ENSURE AN ADEQUATE SUPPLY OF AFFORDABLE HOUSING TO RETAIN AND ATTRACT THE WORKFORCE NECESSARY TO SUPPORT THE COUNTY ECONOMY.

OUTPUT

- Develop public/private partnership for workforce housing
- Identify and acquire land to build workforce housing
- Establish a home rehabilitation program
- Establish/enhance first-time home buyer program
- Create financial incentive for all parties involved

OUTCOME

- Increased working age population
- Increased available workforce
- Increased affordable housing
- Increased first-time homebuyers

OBJECTIVE ENSURE THE COUNTY'S ECONOMY IS BALANCED AND RESILIENT.

OUTPUT

- Identify support industry needs and priorities
- Develop targeted business recruitment strategies
- Develop business resource repository
- Identify and implement strategies to reduce barriers to entry

OUTCOME

- Increased support industry output
- Increased business recruitment
- Increased business expansion
- Increased public and private investments

INDUSTRY & COMMUNITY INPUT

The term “economic development” means different things to different people. To a business and industry, it means opportunities for site selection or infrastructure support and access to workforce and capital. It also means access to a trained and trainable workforce. To a public body, it means business attraction and retention, and collaboration for workforce development and facilities, as well as provision of potential incentives. To the community, economic development is seen through an individual lenses wherein a citizen thinks, “what best helps me in my life.”

Feedback for this plan was gathered from industry leaders and community members through a series of focus groups conducted in October 2022. Participants were asked why they choose to live and work in Garrett County, what challenges they face when working and doing business in the County, what supportive measures would best benefit economic development, and what the desired future state of the County looks like. Through the discussion, clear themes emerged that are highlighted throughout this report.

Garrett County is both an attractive place to live and work. It boasts a variety of natural assets that draw in residents and visitors. It is a business-friendly county with easy access to a large market area. There is a strong focus on the future health and economic vitality of the region which depends, in part, on the County's ability to attract and grow its residential and workforce population. Industry noted the need for a larger trained and trainable workforce to support its success now and to meet the needs of future growth. To be successful in this endeavor, workforce barriers need to be addressed. These include available and affordable workforce housing, training, transportation, and childcare resources. Additionally, access to early childhood education within individual communities was noted as a key to retaining and attracting families. There is much concern around the closing and consolidation of elementary schools. Lastly, participants expressed the need to balance the County's reliance on tourism with the focus on other industries to support long-term economic vibrance.

FOCUS GROUP FEEDBACK



Quality of life is #1



Desire for workforce Training



Desire to retain elementary schools in local communities



Desire for affordable workforce housing

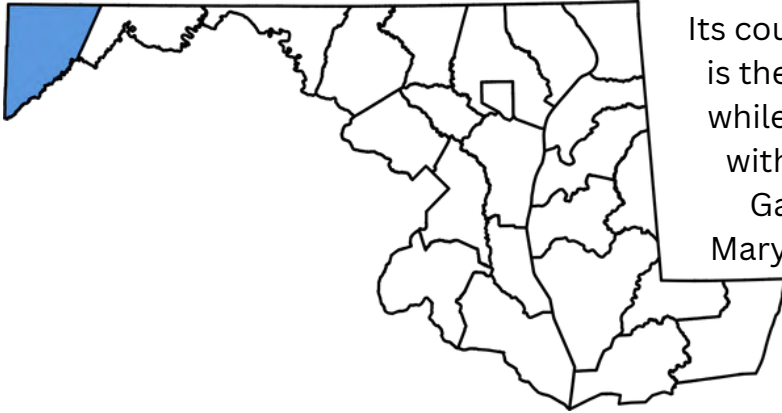


Strong need for workforce attraction & retention



Desire to slow the brain drain

APPENDIX A: DETAILED DATA



Garrett County is the western most county in Maryland. Its county seat is Oakland. Covering 649 square miles, it is the second largest county in Maryland by land area while it is the third least populous county in the state with a population of approximately 29,155 in 2020.

Garrett County is bordered by Allegany County, Maryland to the East, Pennsylvania to the North, and West Virginia to the South and West.

LAND USE

	Accident	Deer Park	Friendsville	Grantsville	Kitzmiller	Loch Lynn Heights	Mountain Lake Park	Oakland
Sq Miles	0.5	1.0	0.9	1.0	0.2	0.3	1.9	2.72
Acres	313.6	640.0	582.4	627.2	140.8	204.8	1,228.8	1,740.8

	Total Municipal Land	DNR Land	County Land	Total Land
Sq Miles	8.6	141.1	507.9	649.1
Acres	5,478.4	90,332	325,079	415,411

	2007	2012	2017	% Change 2007-2017
Farms, Number	677	667	707	4%
Land in Farms, Acres	95,514	95,197	90,357	-5%
Average size of farm	141	143	128	-9%
Median size of farm	103	97	75	-27%
Total Cropland, Farms	586	574	604	3%
Total Cropland, Acres	46,019	41,525	42,660	-7%
Harvested Cropland, Farms	532	525	567	7%
Harvested Cropland, Acres	37,087	36,618	35,124	-5%
Total Income from farm-related sources (\$1,000)	1,554	1,107	1,816	17%

*Data for 2020, unless otherwise noted

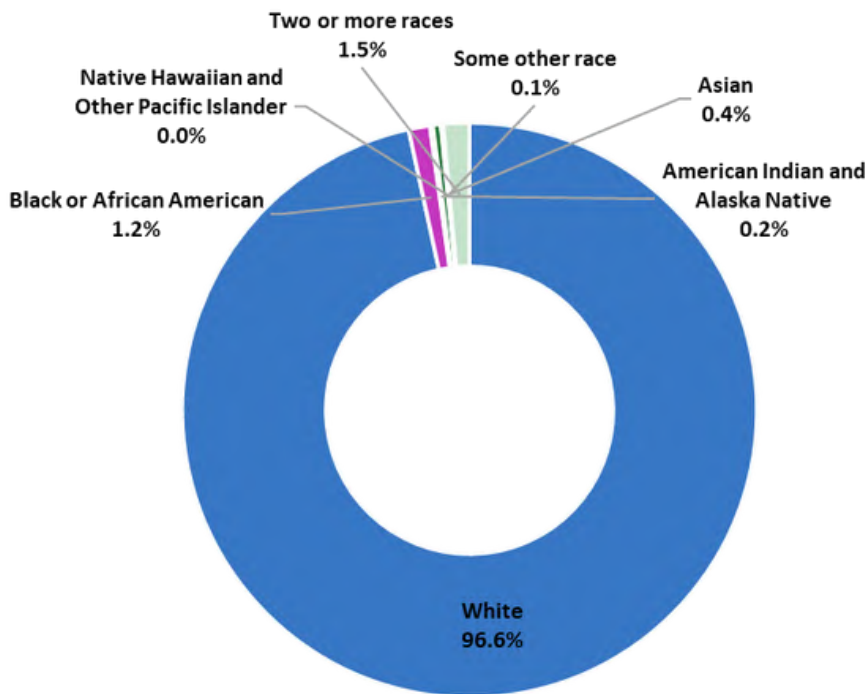
APPENDIX A: DETAILED DATA

DEMOGRAPHICS

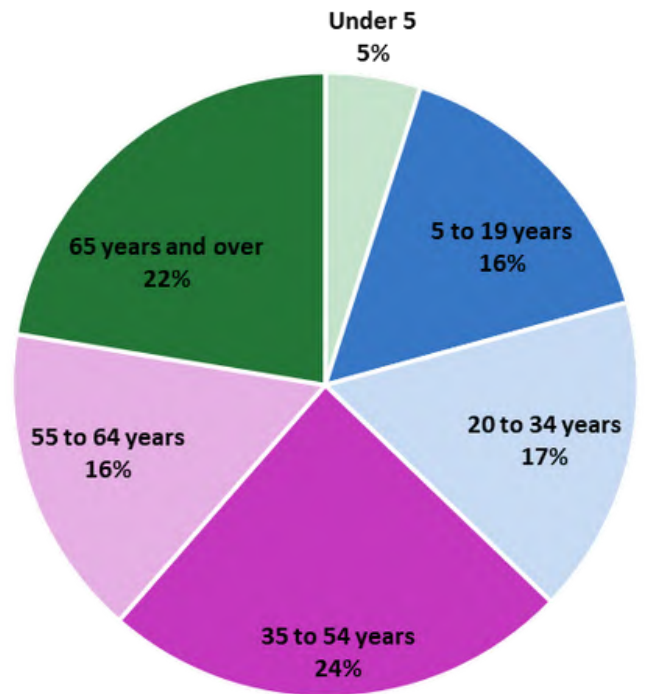
	2016	2017	2018	2019	2020	Population Change	Household Change
Individuals	29,677	29,516	29,367	29,235	29,155	-1.8%	7.4%
Households	11,865	11,865	12,073	12,425	12,745		

Source: U.S. Census Bureau

Population by Race, 2020



Population by Age, 2020



46.8 Years

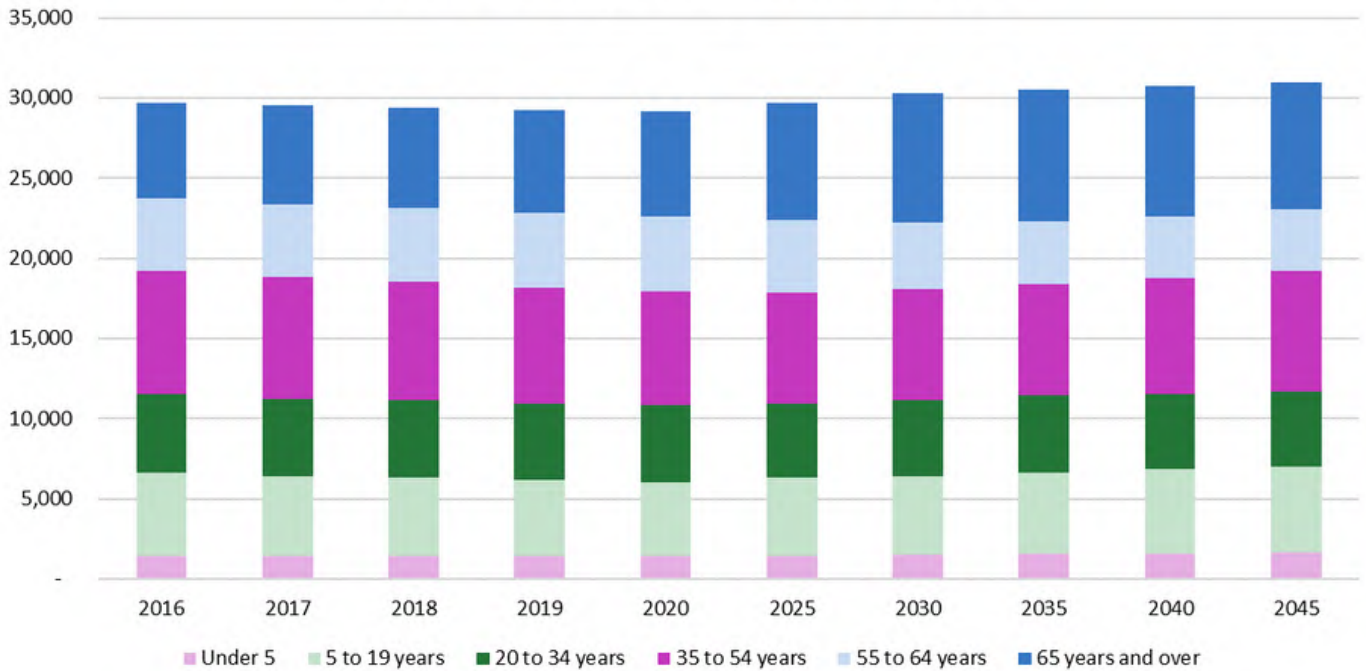
Median Age

4.9 Years
Since
2010

Source: U.S. Census Bureau

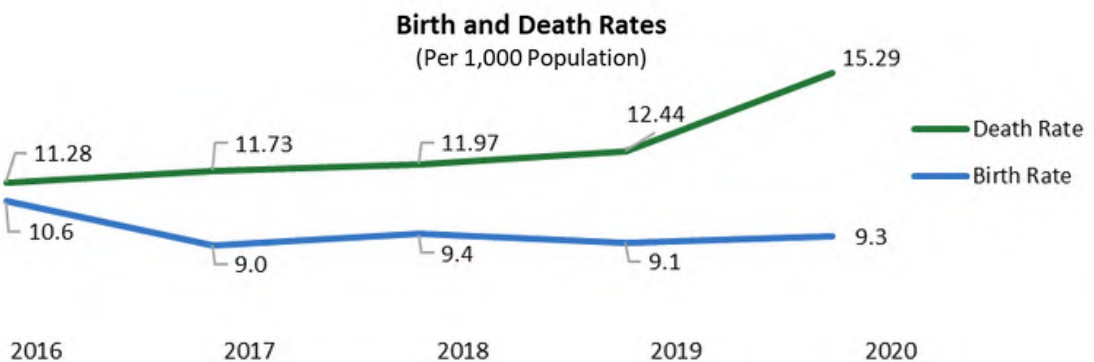
APPENDIX A: DETAILED DATA

Population by Age, Historical and Projected



	2016	2017	2018	2019	2020	2025	2030	2035	2040	2045	% Change 2016-2020	% Change 2020-2045
Total Population	29,677	29,516	29,376	29,235	29,155	29,698	30,254	30,506	30,756	30,997	-2%	6%
Under 5	1,428	1,403	1,436	1,423	1,439	1,445	1,508	1,585	1,611	1,627	1%	13%
5 to 19 years	5,231	4,978	4,888	4,742	4,608	4,904	4,862	5,009	5,219	5,404	-12%	17%
20 to 34 years	4,828	4,870	4,830	4,765	4,791	4,559	4,772	4,851	4,719	4,659	-1%	-3%
35 to 54 years	7,754	7,560	7,370	7,216	7,074	6,951	6,953	6,962	7,210	7,515	-9%	6%
55 to 64 years	4,493	4,579	4,625	4,653	4,716	4,524	4,155	3,904	3,820	3,838	5%	-19%
65 years and over	5,943	6,126	6,227	6,436	6,527	7,315	8,004	8,195	8,177	7,954	10%	22%

Source: Maryland Department of Planning



Source: U.S. Census Bureau

APPENDIX A: DETAILED DATA

\$54,542

Median HH Income

\$77,956

Mean HH Income

\$34,006

Per Capita Income

Change
2016-2020

18%

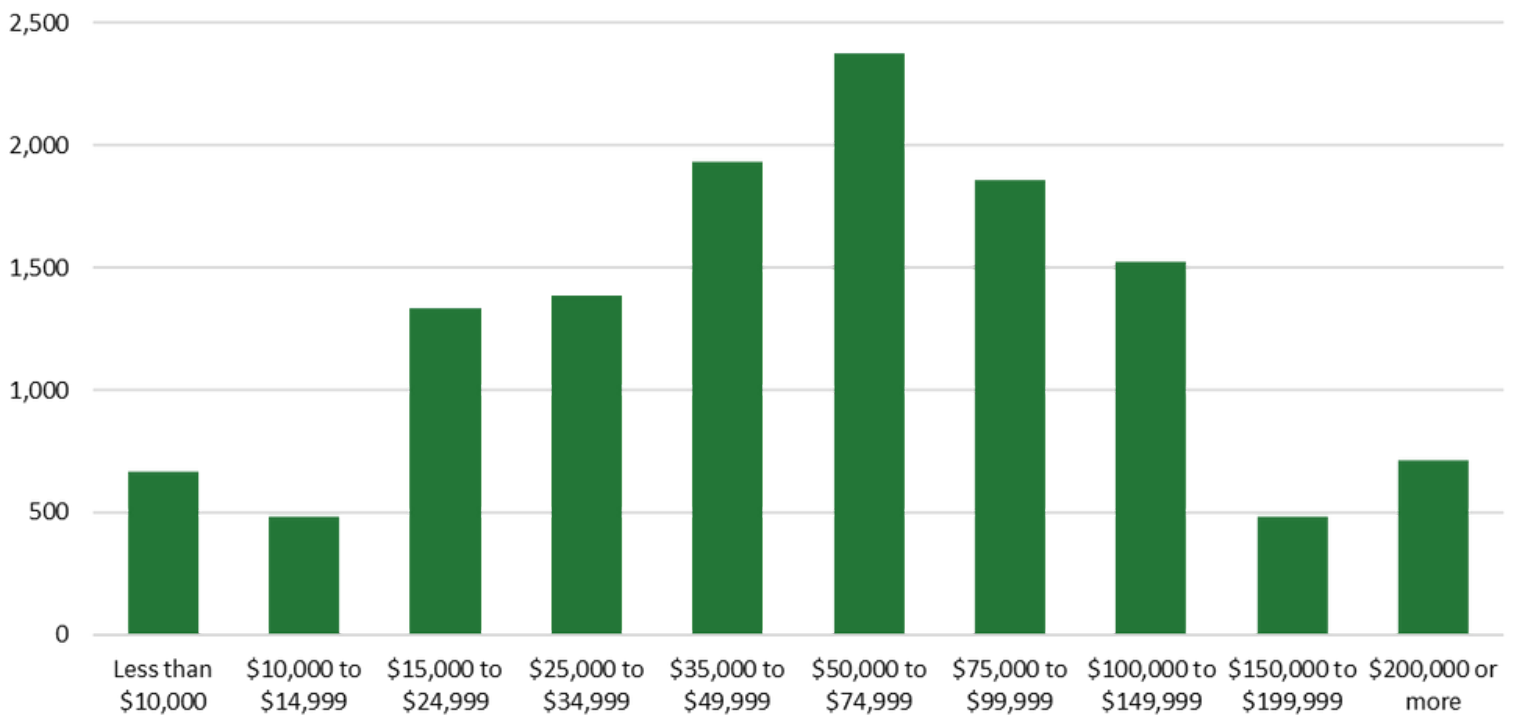
28%

36%

10.6%

Poverty Rate

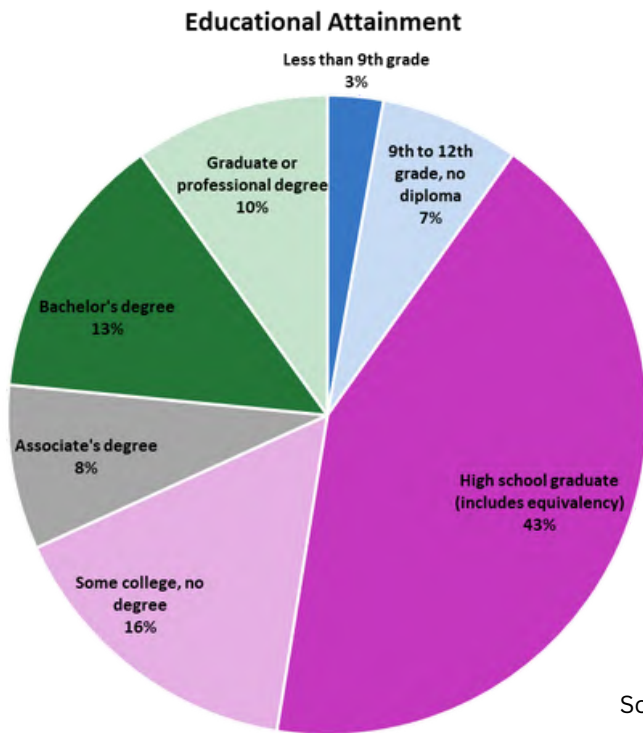
Household Income and Benefits (Inflation Adjusted Dollars)



Source: U.S. Census Bureau

APPENDIX A: DETAILED DATA

EDUCATION



90%

High School Graduate or Higher

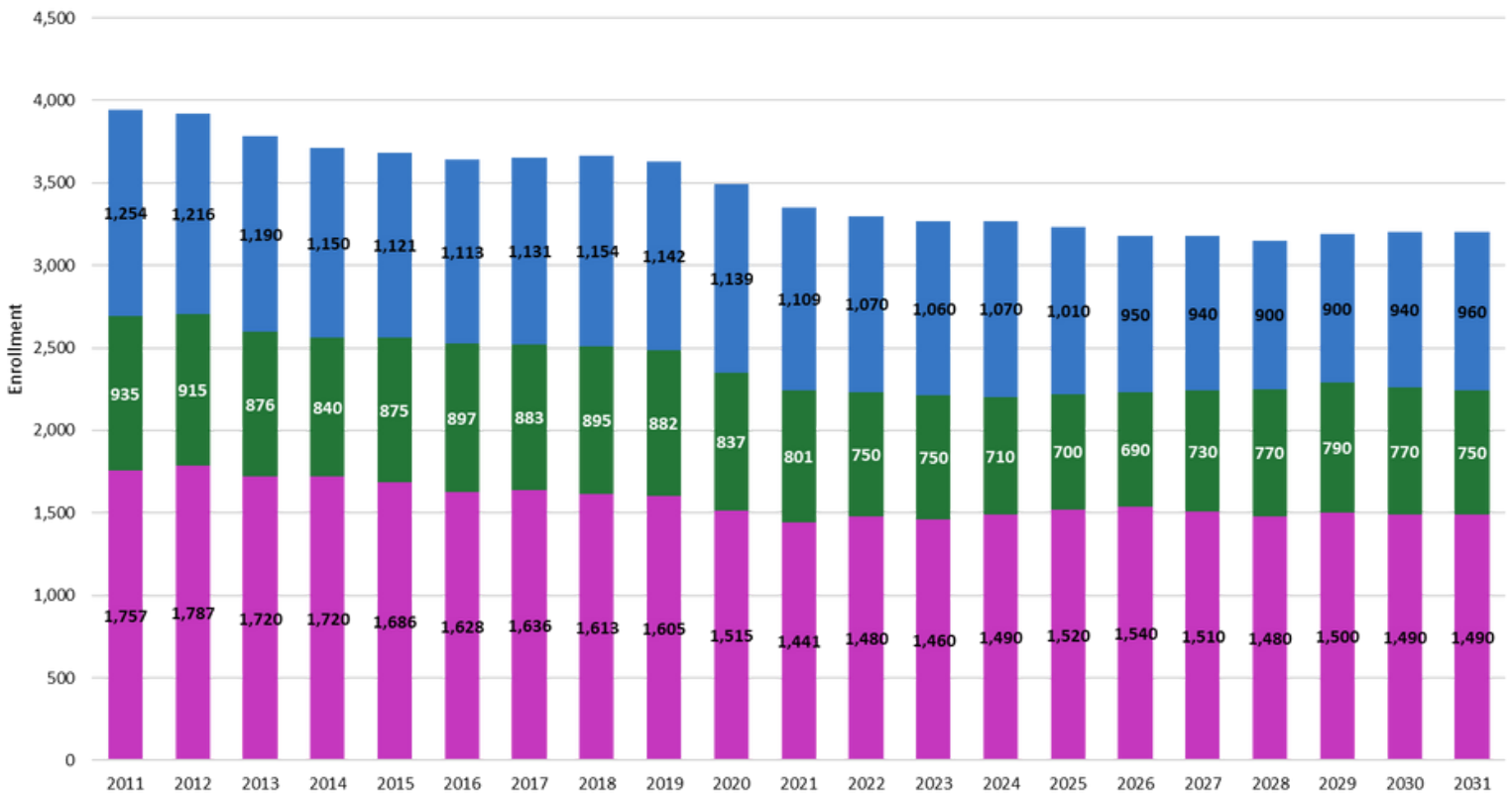


23%

Bachelor's Degree or Higher

Source: U.S. Census Bureau

Public School Historical and Projected Enrollments 2011 - 2021

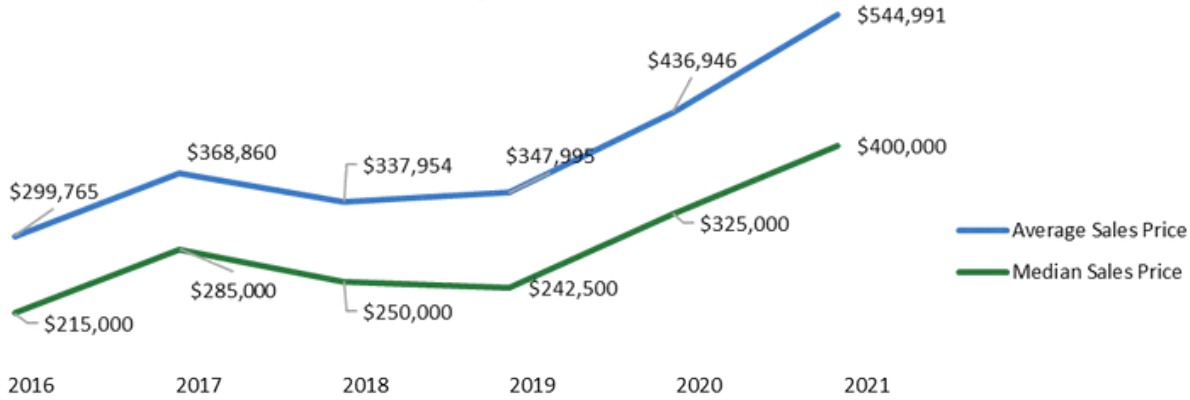


Source: Maryland Department of Planning

APPENDIX A: DETAILED DATA

HOUSING

Housing Prices

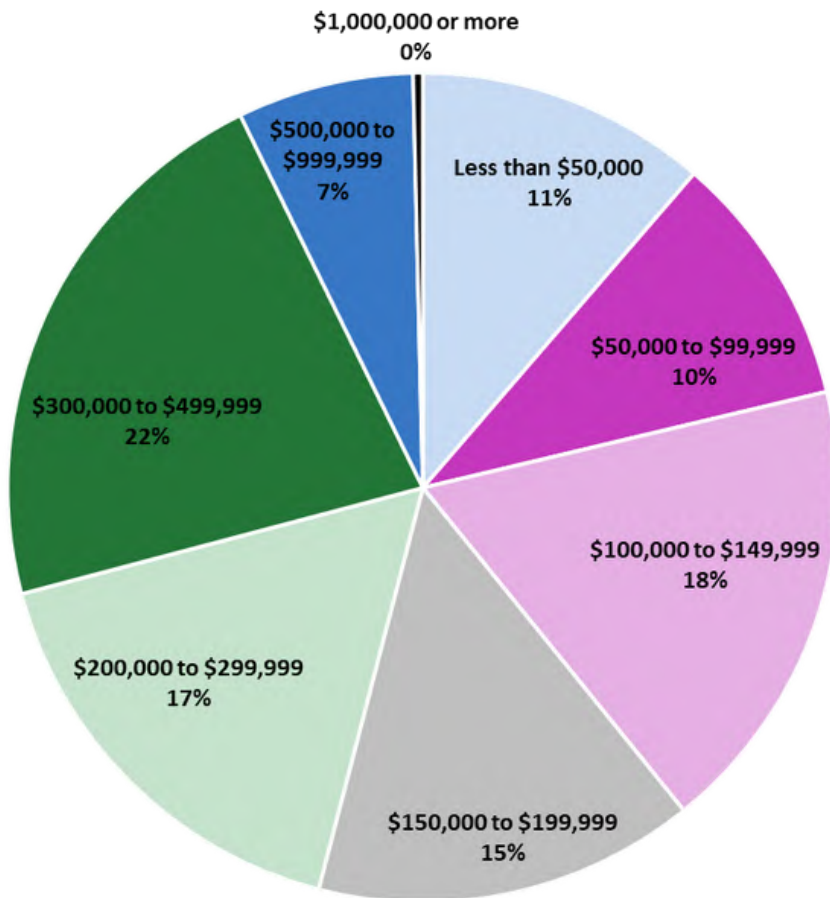


2016-2021
86%

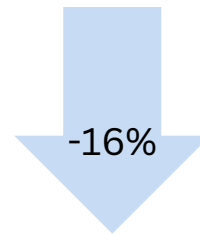
Median
Sales Price

Source: Maryland REALTORS

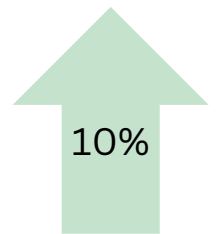
Owner-Occupied Housing Units by Value, 2019



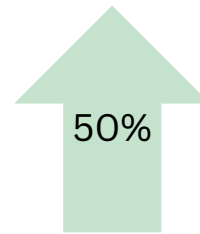
Change
2016-2021



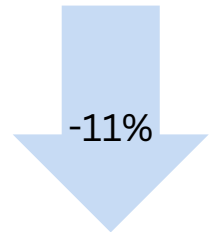
<\$99,999



\$100,000-\$199,999



\$200,000-\$499,999



\$500,000+

48.3%

Houses Built
Prior to 1960

64.9%

Units Occupied

Source: U.S. Census Bureau

APPENDIX A: DETAILED DATA

WORKFORCE & INDUSTRY

Major Employers

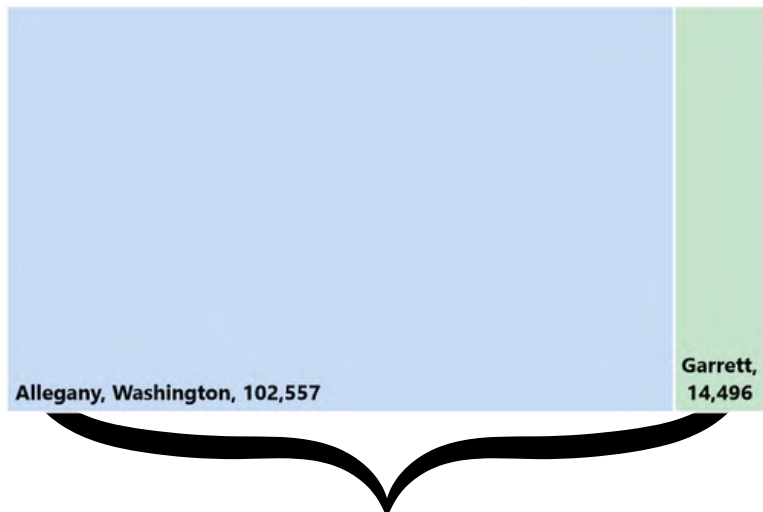
	Industry	Size Category
Beitzel Corp*	Construction	500-749
Closetmaid LLC	Manufacturing	100-249
Day Program Gcc Site	Health Care and Social Assistance	100-249
Dennett Road Manor Inc	Health Care and Social Assistance	100-249
Garrett Regional Medical Center*	Health Care and Social Assistance	250-499
Lowe's Home Improvement	Retail Trade	100-249
McDonald's*	Accommodation and Food Services	100-249
Mettiki Coal	Mining, Quarrying, and Oil and Gas Extraction	100-249
Mettiki Coal LLC*	Mining, Quarrying, and Oil and Gas Extraction	100-249
Morningstar	Finance and Insurance	100-249
Northern Garrett County Rescue	Health Care and Social Assistance	100-249
Oakland Nursing Rehab Ctr	Health Care and Social Assistance	100-249
Our Town Theatre*	Arts, Entertainment, and Recreation	100-249
Pillar Innovations LLC*	Manufacturing	100-249
Shop 'n Save Supermarkets*	Retail Trade	100-249
Uno Pizzeria & Grill	Accommodation and Food Services	100-249
Walmart Supercenter*	Retail Trade	250-499
Wisp Resort*	Accommodation and Food Services	500-749
Wood Products Inc*	Retail Trade	100-249

Source: Maryland Department of Labor

*Indicates Top 10 Employer by Employment Size

APPENDIX A: DETAILED DATA

Labor Market Availability



117,053

Tri-County Labor Market

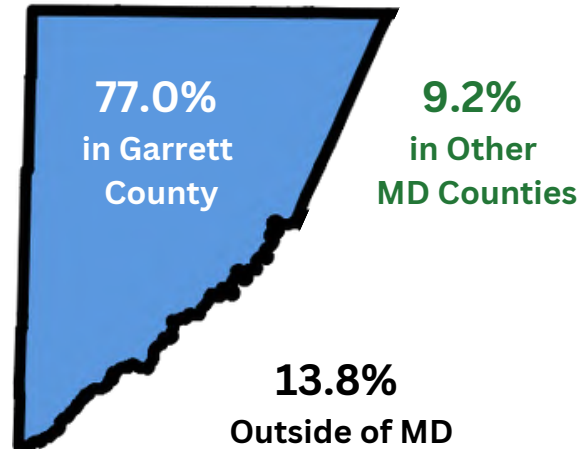
48.5%

Employment Rate¹

4.2%

Unemployment Rate²

Place of Work



7.9%

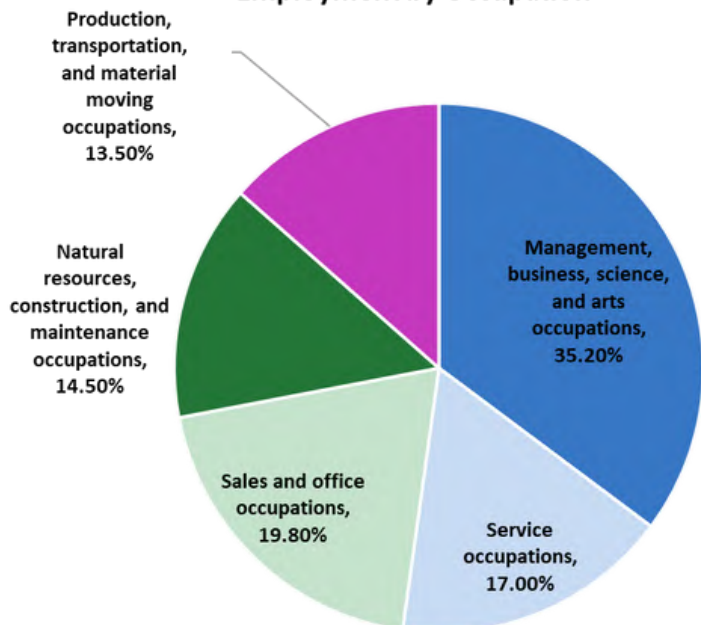
Work from Home



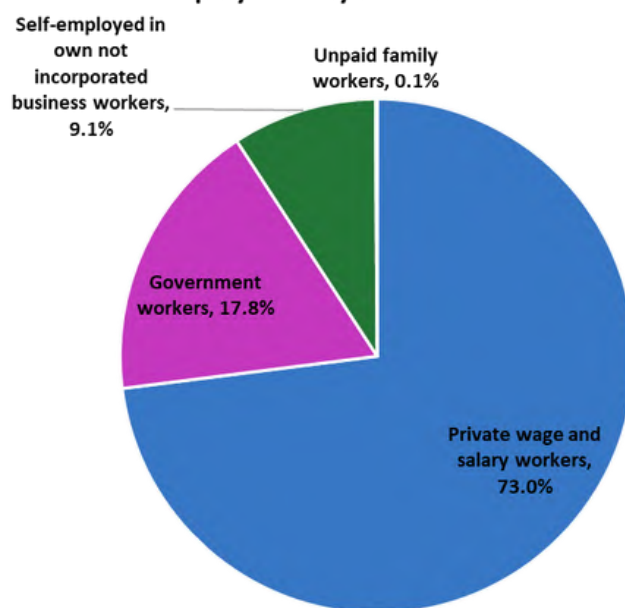
23.7

Mean Commute to Work (minutes)

Employment by Occupation



Employment by Class of Worker



¹ (Employed ÷ Civilian Noninstitutional Population) x 100
² (Unemployed ÷ Labor Force) x 100

Source: U.S. Census Bureau, 2020

APPENDIX A: DETAILED DATA

Hourly Wages (Select Occupations) 2021

	Entry	Median	Skilled
Accountants	\$19.81	\$29.82	\$38.28
Assemblers and Fabricators	\$13.84	\$17.41	\$21.12
Biological technicians	\$17.36	\$23.79	\$25.68
Bookkeeping/accounting clerks	\$13.88	\$18.27	\$22.64
Computer hardware engineers	\$36.38	\$59.37	\$64.70
Computer systems analysts	\$22.16	\$34.09	\$42.19
Computer user support specialists	\$16.16	\$19.98	\$25.49
Customer service representatives	\$12.93	\$17.35	\$19.70
Electrical engineers	\$33.98	\$41.60	\$59.17
Freight, stock and material movers	\$17.00	\$14.06	\$12.64
Industrial truck operators	\$15.49	\$21.39	\$23.74
Information security analyst	\$25.82	\$37.88	\$52.65
Inspectors, testers, sorters	\$13.62	\$18.48	\$25.56
Machinists	\$16.46	\$26.58	\$28.61
Maintenance workers, machinery	\$17.90	\$26.41	\$30.78
Mechanical Engineers	\$35.59	\$47.62	\$55.31
Network support specialist	\$26.23	\$37.32	\$45.28
Packaging/filling machine operators	\$12.43	\$13.95	\$17.96
Packers and packagers, hand	\$11.97	\$14.33	\$15.68
Secretaries	\$13.60	\$17.91	\$21.58
Shipping/receiving clerks	\$12.31	\$14.73	\$19.34
Stock clerks and order fillers	\$12.62	\$14.48	\$18.35
Telemarketer	\$13.31	\$14.47	\$16.28

These figures represent average wages in Western Maryland which includes Allegany, Garrett, and Washington counties

Source: Maryland Department of Labor, Office of Workforce Information & Performance

APPENDIX A: DETAILED DATA

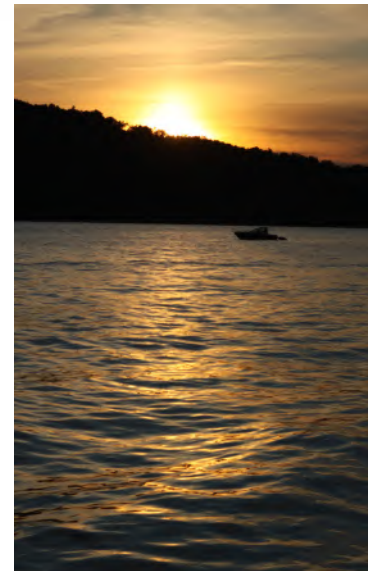
Quarterly Census of Employment and Wages, Calendar Year 2020

	Average Number of Reporting Units	Annual Average Employment	Total Wages (\$)	Average Weekly Wage Per Worker (\$)
TOTAL EMPLOYMENT	950	11,318	435,163,938	739
GOVERNMENT SECTOR -- TOTAL	65	1,602	72,864,692	875
Federal Government	12	76	3,971,310	994
State Government	6	252	11,679,486	892
Local Government	46	1,273	57,213,896	864
PRIVATE SECTOR TOTAL -- ALL INDUSTRIES	885	9,716	362,299,246	717
Natural Resources and Mining	34	318	20,758,101	1,254
Construction	158	979	46,616,900	915
Manufacturing	46	1,023	43,228,504	812
Trade, Transportation, and Utilities	220	2,389	79,223,086	638
Information	9	184	7,678,016	799
Financial Activities	53	475	17,696,899	717
Professional and Business Services	129	802	36,774,432	881
Education and Health Services	76	1,614	68,179,324	812
Leisure and Hospitality	107	1,631	32,131,630	379
Other Services	50	299	10,012,354	644

Source: Maryland Department of Labor, Calendar Year 2020



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STRATEGIC PLAN DEVELOPED BY:

