

**THE COUNTY COMMISSIONERS
OF KENT COUNTY, MARYLAND
AGENDA**

December 19, 2023

6:00 PM Call to Order/Pledge of Allegiance/Moment of Silence

Meeting Announcements - Time Is Allotted At The End Of Each Meeting For The Commissioners To Receive Comments From The Public

Building is Open for In-Person Attendance, for Remote Participation Dial 1-872-239-8359, Conference ID 757 864 133#

Consent Items

#1 - Regular Session Minutes, December 12, 2023

#2 - Liquor Minutes, December 12, 2023

#3 - Closed Session Minutes, December 12, 2023

#4 - Environmental Operations Division, Public Landings

Bayside Landing Marina Renovation Waterway Improvement Grant Agreement
Extension

County Attorney

Thomas N. Yeager, County Attorney

Legislative Session Protocol

Legislative Session

Bill Mackey, Director, Planning, Housing, and Zoning

Code Home Rule Bill 5-2023 Outdoor Retreats In RC, RR, and CR - Third Reading
and Adoption

Bill Mackey, Director, Planning, Housing, and Zoning

Code Home Rule Bill No. 6-2023, First Read for Introduction

Appointments

Jeremy J. Rothwell and Jennifer Moore, Kent County Historic Preservation Commission

The Granary, Turner's Creek Public Landing

Public Works Director

Dan Mattson, Deputy Director, Public Works

Engineering - Status of Courthouse Lobby Expansion Design

Departmental Appointments

Jamie Williams, Director, Economic and Tourism Development

Short-term Rental Update

Jamie Williams, Director, Economic and Tourism Development and Rick Carter,
Owner/Operator, Delmarva Craft

2023 Seasonal Shuttle Update
Shalyn Boulden, Tourism Manager, Economic and Tourism Development
2022 Economic Impact of Tourism in Maryland

Human Resources Director

Jim Miller, Director, Human Resources
Modification to Department of Planning, Housing & Zoning Staff Duties
Jim Miller, Director, Human Resources
Teleworking Policy

County Administrator

Jay Silcox, President, Kent County Library Board of Trustees
Kent County Library Board of Trustees
Jill Coleman, Director, Parks and Recreation
Kent County Parks and Recreation Advisory Board (PRAB)

County Administrator Report

Ashley Albia, Treasury Accountant, Office of Finance
State Fiscal Year 2025, State Aid For Police Protection (SAPP) Fund

Letters for Signature

Agricultural Advisory Commission
Member Appointments
Zoning Appeals Board
Member Appointments
Historic Preservation Commission
Member Appointments
Planning Commission
Member Appointments

Public Comment/Media Review

Procedures For Public Comment

For Your Information

Maryland Department of the Environment
Notice of Water Appropriation and Use Permit Issued

American Rescue Plan Act Funds

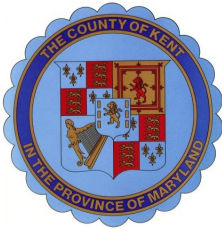
American Rescue Plan Act (ARPA) Funds Spend Plan

Contingency Fund

Contingency and Use of Fund Balance Report

(Meetings are conducted in Open Session unless otherwise indicated. All or part of County Commissioners' meetings can be held in closed session under the authority of the MD Open Meetings Law by vote of the Commissioners.

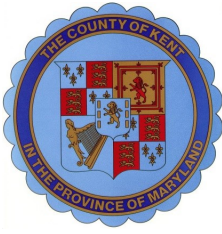
Breaks are at the call of the President. Please note that times listed for specific items on the agenda are only estimates, and that the order of agenda items may change as time dictates or allows. Meetings are subject to audio and video recordings.)



**#1 - Regular Session Minutes, December 12, 2023
12/19/2023
County Commissioners Meeting**

ATTACHMENTS:

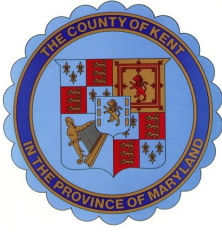
Description



**#2 - Liquor Minutes, December 12, 2023
12/19/2023
County Commissioners Meeting**

ATTACHMENTS:

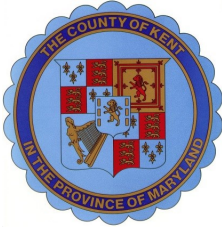
Description



**#3 - Closed Session Minutes, December 12, 2023
12/19/2023
County Commissioners Meeting**

ATTACHMENTS:

Description



#4 - Environmental Operations Division, Public Landings
12/19/2023
County Commissioners Meeting

ATTACHMENTS:

Description

12.19.23 MD Dept. of Natural Resources Chesapeake and Coastal Services Waterway Improvement Fund,
Grant Agreement MF-1420H-20 Modification No.2 Bayside Landing

WATERWAY IMPROVEMENT FUND
GRANT AGREEMENT
MF-1420H-20

Modification Number Two

to

Maryland Department of Natural Resources

entered into this _____ day of _____, 20____.

between the

Department of Natural Resources
Chesapeake and Coastal Service
Waterway Improvement Fund

and

Kent County

Pursuant to the terms of the Grant Agreement, dated 26, July 2019, between the State of Maryland acting through the Department of Natural Resources, Chesapeake and Coastal Service and Kent County, regarding provision of assistance for the Bayside Landing Marina Renovation, the Agreement is amended to incorporate the following changes. The purpose of the Modification is to provide a no-cost extension and modify the scope of work.

In the event of any conflict or incongruity between the provisions of this amendment and any of the provisions of said Agreement as heretofore amended, the provisions of this amendment shall in all respects govern and control.

TERM:

The term of this Grant Agreement shall be from July 1, 2019 through December 31, 2024.

SCOPE OF WORK

The scope of work is modified for the deliverable schedule as per below:

TIME FRAMEDUE DATEFY 2024 (ADDITIONAL)

July 1, 2023 – September 30, 2023
October 1, 2023 – December 31, 2023
January 1, 2024 – March 31, 2024
April 1, 2024 – June 30, 2024

October 15, 2023
January 15, 2024
April 15, 2024
July 15, 2024

FY 2025 (ADDITIONAL)

July 1, 2024 – September 30, 2024
October 1, 2024 – December 31, 2024

October 15, 2024
December 31, 2024

This document may be executed in multiple counterparts, each of which shall be deemed an original, and all of which together shall constitute one and the same instrument. Signatures, including notary signatures, provided by electronic means including, by way of example and not of limitation, facsimile, Adobe, PDF, and sent by electronic mail, or via an electronic signature program, shall be deemed to be original signatures.

IN WITNESS WHEREOF, the parties have executed this Amendment by causing the same to be signed on the day and year first above written.

WITNESS

Kent County

Touya Thomas
Print Name: Touya Thomas

By Ronnie Fithian
Name Ronald H. Fithian

Date: December 19, 2023

Modification #2

605P0600037

WITNESS

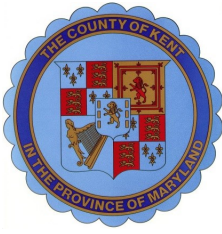
STATE OF MARYLAND
DEPARTMENT OF NATURAL
RESOURCES

Print Name: _____

By _____

Christine Conn, PhD.
Unit Director
Chesapeake and Coastal Service

Date: _____



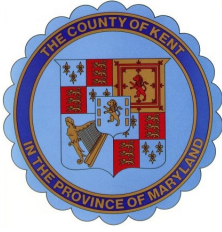
Thomas N. Yeager, County Attorney
12/19/2023
County Commissioners Meeting

Item Summary:

Legislative Session Protocol

ATTACHMENTS:

Description



Bill Mackey, Director, Planning, Housing, and Zoning
12/19/2023
County Commissioners Meeting

Item Summary:

AN ACT to amend Chapter 222, Zoning, of the Public Local Laws of Kent County, Maryland, also known as the Kent County Land Use Ordinance, in order to add a new land use and to permit said new use in certain districts as a special exception: (1) by adding "14.5 Outdoor Retreat" to Article V. District Regulations, Section 3. Rural Character, §3.3 Special Exceptions; (2) by adding "15.5 Outdoor Retreat" to Article V. District Regulations, Section 4. Rural Residential, §4.3 Special Exceptions; (3) by adding "12.5 Outdoor Retreat" to Article V. District Regulations, Section 6. Community Residential, §6.3 Special Exceptions; (4) by adding "25.5 Outdoor Retreat" to Article VII. Special Exceptions, Section 6 Procedures; (5) by adding a specific conditions for said new land use "34.5 Outdoor Retreat" to Article VII. Special Exceptions, Section 7 Special Exceptions; (6) by adding a new definition under "227.5 Outdoor Retreat" to Article XI. Definitions, Section 2. Definitions; and including one non-codified provision.

On July 6, 2023, and August 3, 2023, the Kent County Planning Commission held a public hearing, reviewed the proposed applicant-initiated zoning text amendment, and made recommendations to the County Commissioners. A letter from the Planning Commission is attached.

On September 6, 2023, the Kent County Agriculture Advisory Commission reviewed the proposed zoning text amendment and made recommendations to the County Commissioners. A letter from the Agriculture Advisory Commission is attached.

On October 3, 2023, the County Commissioners voted to introduce CHRB 5-2023 in order to schedule the public hearing.

On November 14, 2023, the County Commissioners held a public hearing. The applicant and the applicant's counsel spoke in support of the legislation. A member of the public spoke in opposition.

On November 17, 2023, the comment period ended. Two comments were received in opposition of the proposed legislation.

This item is presented for consideration and adoption, adoption with written amendments, or rejection by the County Commissioners.

ATTACHMENTS:

Description

DRAFT Code Home Rule Bill 5-2023 Outdoor Retreat In RC, RR, and CR

Letter from the Planning Commission

Letter from the Agriculture Advisory Commission

Email received from Pat Langenfelter
J. Gifford - Written_Testimony_CHRB5-2023

THE COUNTY COMMISSIONERS OF KENT COUNTY, MARYLAND

October 3, 2023
Legislative Session Day

Legislative Session Day
October 3, 2023

CODE HOME RULE
BILL NO. 5-2023

INTRODUCED BY: Ronald H. Fithian, President of the Board of County Commissioners for Kent County, Maryland.

AN ACT to amend Chapter 222, Zoning, of the Code of Public Local Laws of Kent County, Maryland, also known as the Kent County Land Use Ordinance, in order to add a new land use and to permit said new use in certain districts as a special exception: (1) by adding "14.5 Outdoor Retreat" to Article V. District Regulations, Section 3. Rural Character, §3.3 Special Exceptions; (2) by adding "15.5 Outdoor Retreat" to Article V. District Regulations, Section 4. Rural Residential, §4.3 Special Exceptions; (3) by adding "12.5 Outdoor Retreat" to Article V. District Regulations, Section 6. Community Residential, §6.3 Special Exceptions; (4) by adding "25.5 Outdoor Retreat" to Article VII. Special Exceptions, Section 6 Procedures; (5) by adding specific conditions for said new land use "34.5 Outdoor Retreat" to Article VII. Special Exceptions, Section 7 Special Exceptions; (6) by adding a new definition under "227.5 Outdoor Retreat" to Article XI. Definitions, Section 2. Definitions; and including one non-codified provision.

THE COUNTY COMMISSIONERS
OF KENT COUNTY, MARYLAND

Ronald H. Fithian, President

INTRODUCED, read the first time, October 3, 2023, ordered posted and public hearing scheduled on November 14, 2023, at 10:00 a.m. / p.m. in the County Commissioners Hearing Room, R. Clayton Mitchell, Jr., Kent County Government Center, 400 High Street, Chestertown, Maryland.

By order of:

Sondra M. Blackiston, Clerk

PUBLIC HEARING

HAVING been posted and notice of the time and place of the hearing and copies having been made available to the public and the press, a public hearing was held on November 14, 2023. Reported favorably [with] [without] amendments; read the second time and ordered to be considered on December 19, 2023, a legislative session day.

BILL NO. 5-2023

1

CAPITALS & BOLD INDICATES MATTER ADDED TO EXISTING LAW.

Strike through indicates matter deleted from existing law.

**A BILL ENTITLED CHR 5-2023 OUTDOOR RETREATS IN
RURAL CHARACTER, RURAL RESIDENTIAL, AND COMMUNITY RESIDENTIAL**

NOW, THEREFORE, BE IT ENACTED BY THE COUNTY COMMISSIONERS OF KENT COUNTY, MARYLAND THAT THE KENT COUNTY LAND USE ORDINANCE IS HEREBY AMENDED AS FOLLOWS:

SECTION 1.

**ARTICLE V.
DISTRICT REGULATIONS**

SECTION 3. RURAL CHARACTER

...

3.3 Special Exceptions

...

13. Golf course, public or private

14. More than four horses and mules on land less than 20 acres in size

14.5 OUTDOOR RETREAT

15. Personal wireless facility tower

...

SECTION 2.

**ARTICLE V.
DISTRICT REGULATIONS**

SECTION 4. RURAL RESIDENTIAL

...

4.3 Special Exceptions

...

13. Golf course, public or private

14. Houses of worship

15. More than four horses and mules on land less than 20 acres in size

15.5 OUTDOOR RETREAT

16. *Private clubs*

...

BILL NO. 5-2023

2

CAPITALS & BOLD INDICATES MATTER ADDED TO EXISTING LAW.

~~Strike through~~ indicates matter deleted from existing law.

SECTION 3.

ARTICLE V. DISTRICT REGULATIONS

SECTION 6. COMMUNITY RESIDENTIAL

...

6.3 Special Exceptions

...

11. Golf course, public or private

12. Houses of worship

12.5 OUTDOOR RETREAT

13. *Private clubs*

...

SECTION 4.

ARTICLE VII. SPECIAL EXCEPTIONS

SECTION 6. PROCEDURES

The application for a special exception shall include a site plan together with such data and information as may be required for a determination of the nature of the proposed use and its effect on the Comprehensive Plan, the neighborhood, and surrounding properties.

The Planning Director may hear and decide the following special exceptions:

1. Accessory storage structures

...

The Planning Commission shall review and send a recommendation to the Board of Appeals on the following special exceptions:

1. Aquaculture

...

24. Outdoor entertainment

25. Outdoor recreation, miniature golf, but not golf courses

25.5 OUTDOOR RETREAT

26. Personal wireless facility tower

...

BILL NO. 5-2023

CAPITALS & BOLD INDICATES MATTER ADDED TO EXISTING LAW.

~~Strike through~~ indicates matter deleted from existing law.

SECTION 5.

ARTICLE VII. SPECIAL EXCEPTIONS

SECTION 7. SPECIAL EXCEPTIONS

...

33. Outdoor entertainment in IV and IVCA

34. Outdoor recreation, miniature golf, but not golf courses, in V, IV, and IVCA.

34.5 OUTDOOR RETREAT IN RC, RR, AND CR PROVIDED:

- A. THE PROJECT SHALL BE LOCATED ON A PARCEL OF AT LEAST TEN ACRES.**
- B. THE NUMBER OF GUEST UNITS PROVIDED ON THE SITE IS LIMITED TO FIFTEEN EXCLUDING RESIDENT MANAGEMENT QUARTERS. THERE SHALL BE A MAXIMUM OF TWENTY STRUCTURES, INCLUDING THE GUEST UNITS, ON ANY PERMITTED SITE.**
- C. DINING SERVICES MAY BE PROVIDED ONLY TO GUESTS.**
- D. THE SITE HAS ACCESS TO A PUBLIC ROAD. THIS ACCESS MUST BE CAPABLE OF SUPPORTING THE PASSAGE OF EMERGENCY VEHICLES. THE BOARD MAY REQUIRE IMPROVEMENTS TO EXISTING ACCESS ROADS.**
- E. THERE SHALL BE SUFFICIENT ACREAGE FOR THE PROPOSED USE AND ACTIVITIES.**
- F. ADEQUATE LANDSCAPING SHALL BE PROVIDED TO SCREEN ALL PARKING AREAS FROM ADJOINING RESIDENTIAL PROPERTIES. LANDSCAPING OR SCREENING PROPOSED SHALL BE SHOWN ON A SITE PLAN AS REQUIRED BY THIS ORDINANCE.**
- G. THE USE AND OCCUPANCY OF THE GUEST UNITS IS INHERENTLY TRANSIENT AND GUEST OCCUPANCY SHALL BE LIMITED TO TWO WEEKS. THERE SHALL BE A MAXIMUM OCCUPANCY OF TWO ADULT GUESTS, AND TWO ADDITIONAL CHILDREN GUESTS, IN EACH GUEST UNIT.**
- H. ALL NEW ACCESSORY USES AND OUTDOOR RETREAT STRUCTURES SHALL BE SETBACK A MINIMUM OF 100 FEET FROM ANY ADJACENT PROPERTY LINE.**
- I. THE PLANNING COMMISSION AND BOARD OF APPEALS SHALL PLACE CONDITIONS OR RESTRICTIONS ON EVENTS AS MAY BE APPROPRIATE TO ASSURE THE COMPATIBILITY OF THE USE WITHIN A DISTRICT OR LOCATION.**
- J. ALL STRUCTURES SHALL MEET ALL APPLICABLE KENT COUNTY CODES, INCLUDING THE BUILDING CODE, AND HEALTH DEPARTMENT REGULATIONS.**

35. Personal wireless facility tower in AZD, RCD, RC, CC, C, CCA, EC, and I provided:

...

SECTION 6.

ARTICLE XI.
DEFINITIONS

SECTION 2. DEFINITIONS

...

227. Open Space – Those areas suitable ...

227.5 OUTDOOR RETREAT – A LOT, TRACT, OR PARCEL OF LAND CONTAINING UP TO FIFTEEN GUEST UNITS, DESIGNED FOR AND UTILIZED FOR PERIODIC, TRANSIENT OCCUPANCY AND NOT AS A PERMANENT RESIDENCE, AND WHICH MAY CONTAIN OUTDOOR RECREATIONAL ACCOMMODATIONS, DINING FACILITIES FOR GUESTS, AND BATHROOM ACCOMMODATIONS FOR GUESTS.

228. Overbank Flood Protection Volume – The volume controlled by ...

...

[REMAINDER OF PAGE LEFT INTENTIONALLY BLANK]

SECTION 7. **BE IT FURTHER ENACTED** by the County Commissioners of Kent County that this Act shall take effect on the _____ day of _____, 2023.

Read Third Time _____

PASSED this _____ day of _____, 2023.

Failed of Passage _____

By order of:

Sondra M. Blackiston, Clerk

THE COUNTY COMMISSIONERS
OF KENT COUNTY, MARYLAND

(SEAL)

Ronald H. Fithian, President

Albert H. Nickerson, Member

John F. Price, Member

ORDERED a fair summary thereof or the entire bill shall be published in at least one newspaper of general circulation in the County, not less than three times at weekly intervals within a four-week period.



Planning Commission
Department of Planning, Housing, and Zoning

August 3, 2023

The Honorable Ronald H. Fithian, President
Kent County Board of County Commissioners
400 High Street
Chestertown MD 21620

RE: Zoning Text Amendment regarding new use: Outdoor Retreat

Dear President Fithian:

At its meeting on August 3, 2023, the Planning Commission reviewed an application by Sandra Donnely for a zoning text amendment to amend the Kent County Land Use Ordinance to add a new special exception for an Outdoor Retreat in the Agricultural Zoning District, Rural Character, Rural Residential, Community Residential, and Village districts.

Following discussion, the Planning Commission voted 4-1 to provide a favorable recommendation to the County Commissioners on the proposed zoning text amendment with the following recommended amendments:

- The proposed use not be allowed in the Village district.
- Standard "a" be changed to "the project shall consist of a parcel of at least ten acres."
- Standard "h" be changed to "all new accessory uses and outdoor retreat structures shall be setback a minimum of 100 feet from any adjacent property line."
- Standard "i" be changed to "the Planning Commission and Board of Appeals shall place conditions or restrictions on events as may be appropriate to assure the compatibility of the use within a district or location."

Sincerely,

Kent County Planning Commission

Joe Hickman, Chairman

c: Shelley L. Heller, County Administrator



Agriculture Advisory Commission

Department of Planning, Housing, and Zoning

September 6, 2023

The Honorable Ronald H. Fithian, President
Kent County Board of County Commissioners
400 High Street
Chestertown MD 21620

RE: Text Amendment regarding new use: Outdoor Retreat

Dear President Fithian:

At its meeting on September 6, 2023, the Agriculture Advisory Commission reviewed an application for a zoning text amendment to amend the Kent County Land Use Ordinance to add a new special exception for an Outdoor Retreat in the Agricultural Zoning District, Rural Character, Rural Residential, Community Residential, and Village districts.

Following discussion, Agriculture Advisory Commission recommended removal of the AZD from the proposed ZTA.

If you have any questions, kindly contact a team member within the Department of Planning, Housing, and Zoning.

Sincerely,

Jennifer Debnam, Chair

c: Shelley L. Heller, County Administrator

Redacted to remove
personal email address

Sent: Wednesday, November 15, 2023 2:59 PM

To: Kent County Commissioners

Subject: Code Home Rule 5-2023

Dear Commissioners,

I was unable to attend the hearing on November 14, 2023 so I am submitting a few comments on the Zoning Text Amendment.

First, these new entities, Outdoor Retreats, have several conditions to be met in order to get permission to proceed. However, it seems that some type of oversight or enforcement will be required to determine compliance once the project is operational. That puts a strain on the Planning Department's personnel and budget. Will there be additional income from these new businesses to cover the costs?

Second, I do not see any specifications as to the size of the structures to be erected. Shouldn't there be a minimum/maximum size to the guest units and the communal food and bath buildings?

Third, since these Retreats are to be permitted in three residential zones, the landscape screening should protect neighbors from not only the parking area, but also lights and noise that that will emanate from the grounds.

Thank you for considering my comments.

Sincerely,
Patricia Langenfelter
11974 Black's Station RD
Kennedyville, MD 21645

From: Judy Gifford
Sent: Friday, November 17, 2023 12:47 PM
To: Kent County Commissioners <kentcounty@kentgov.org>
Subject: CHRB 5-2023

November 17, 2023

Ronald Fithian, President, Kent County Commissioners (KCC)
Albert Nickerson, Member
John Price, Member

Dear Commissioners:

I am writing to urge you to deny CHRB 5-2023, "Outdoor Retreats". I have listened to testimony from the applicant in three meetings and still do not know what she is proposing to build or why the County should adopt this vague ZTA. At the first hearing the plan was seasonal then it changed to year round. Initially the "units" were pods, then buildings without foundations to lower the taxes. Most recently, the units were "hotel rooms" and maybe cabins.

Without knowing the type of "outdoor retreat" planned, it is impossible to know if there is a public need. Glamping, a form of camping involving accommodations and facilities that are more luxurious than those associated with traditional camping and include private bathroom facilities and gourmet food, is very popular. Campsites with "hotel rooms" with no bathrooms en suite but have a bathhouse or communal bath and shower are very different from Glamping and are not in high demand especially those not in parks or other designated camping sites. In fact, it is unclear why Mrs. Donnelly's proposal could not be designed to conform to current requirements for camping, especially since it is still unclear as to what she has in mind.

The ZTA states the "outdoor retreat" **MAY** contain bathrooms not **SHALL** contain bathrooms which could lead to some very sketchy developments in Rural Character, Rural Residential and Community Residential. Bayshore Campsites is an example of what can go wrong when requirements are not clear or enforced. This language is in conflict with the section of the ZTA that mandates compliance with health and building codes.

I would like to know why Villages were stripped from the ZTA. Would the same concerns not also apply to the other districts?

The ZTA has a minimum acreage of 10 acres but no maximum. Guest units, whatever that means, are limited to 15 but a maximum of 20 structures is allowed. The other structures are not defined which makes it very difficult for the Board of Appeals to decide what should or shouldn't be allowed. Could a large stage be built? The County has not adopted any noise regulations so what would prohibit concerts. Would a Ferris Wheel be allowed in Rural Character districts?

How is "sufficient acreage" determined for "proposed activities"? What is "adequate landscaping" to screen parking lots? Should the undefined "structures needed for proposed activities" also be screened? How does the Board of Appeals determine whether something is adequate or sufficient?

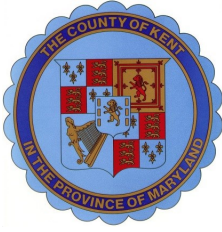
While so much of this ZTA is vague or undefined, it is striking that the occupancy of the "units" is very specific: 2 weeks, 2 adults and 2 children. Can 4 adults stay in 1 unit? How will that be enforced?

I will not repeat the concerns already stated over enforcement, tax income versus costs for the County and abandonment reclamation.

Without clear and concise parameters and language, Code Home Rule 5-2023 is a threat to our Rural Character, Rural Residential and Community Residential districts and should not be approved.

Sincerely,

Judy Gifford
12246 Locust Grove Road
Kennedyville, MD 21645



Bill Mackey, Director, Planning, Housing, and Zoning
12/19/2023
County Commissioners Meeting

Item Summary:

AN ACT to amend Chapter 222, Zoning, of the Code of Public Local Laws of Kent County, Maryland, also known as the Kent County Land Use Ordinance, in order to add a new land use and to permit said new use in a single district as a special exception: (1) by adding “2.5 Adaptive reuse of existing structures in AZD, located on parcels under 20 acres” to Article V. District Regulations, Section 1. Agricultural Zoning District, §1.3 Special Exceptions; (2) by adding said new land use as “6. Adaptive reuse of existing structures in AZD, located on parcels under 20 acres” to Article VII. Special Exceptions, Section 6. Procedures, un-numbered second paragraph regarding those special exceptions that may be approved by the Planning Director; (3) by adding six specific conditions, indicated as A through E, for said new land use in “3.5 Adaptive reuse of existing structures in AZD, located on parcels under 20 acres” to Article VII. Special Exceptions, Section 7. Special Exceptions; and (4) by including one non-codified provision.

On September 6, 2023, the Kent County Agriculture Advisory Commission reviewed the proposed zoning text amendment in concept and made recommendations to the County Commissioners. A letter from the Agriculture Advisory Commission is attached.

On November 2, 2023, the Kent County Planning Commission held a public hearing, reviewed the proposed applicant-initiated zoning text amendment, and made recommendations to the County Commissioners. A letter from the Planning Commission is attached.

This item is presented for introduction and to schedule a public hearing before the County Commissioners at a future date.

Staff recommends approval, in order to schedule the public hearing.

ATTACHMENTS:

Description

Letter from the Agriculture Advisory Commission

Letter from the Planning Commission

DRAFT Code Home Rule Bill X-2023 for Introduction

Application for ZTA by Michael Granger



Agriculture Advisory Commission

Department of Planning, Housing, and Zoning

September 6, 2023

The Honorable Ronald H. Fithian, President
Kent County Board of County Commissioners
400 High Street
Chestertown MD 21620

RE: Zoning Text Amendment regarding new use: Adaptive Re-use in AZD

Dear President Fithian:

At its meeting on September 6, 2023, the Agriculture Advisory Commission reviewed an application for a zoning text amendment to amend the Kent County Land Use Ordinance to add a new special exception for an adaptive re-use in the Agricultural Zoning District. This use is currently in the *Proposed DRAFT Land Use Ordinance for Review*.

Following discussion, Agriculture Advisory Commission recommended for approval of the new use as proposed.

If you have any questions, kindly contact a team member within the Department of Planning, Housing, and Zoning.

Sincerely,

Jennifer Debnam, Chair

c: Shelley L. Heller, County Administrator



Planning Commission
Department of Planning, Housing, and Zoning

November 2, 2023

The Honorable Ronald H. Fithian, President
Kent County Board of County Commissioners
400 High Street
Chestertown MD 21620

RE: Zoning Text Amendment re adaptive reuse of existing structures in AZD on parcels under 20 acres

Dear President Fithian:

At its meeting on November 2, 2023, the Planning Commission reviewed an application by Michael Granger for a zoning text amendment to amend the current Land Use Ordinance to add a use from the proposed *DRAFT Land Use Ordinance for Review*, i.e., adaptive reuse of existing structures in AZD, located on parcels under 20 acres.

Following its discussion, the Planning Commission voted 6-0 to provide a favorable recommendation to the County Commissioners on the proposed zoning text amendment, citing consistency with the Comprehensive Plan, that via the Board of Appeals review process for special exceptions, future adaptive reuse projects will be required to have access to a public road, that future adaptive reuse projects will be limited to appropriate traffic levels, that future adaptive reuse projects will not require roadway improvements that would be detrimental to the area, that future adaptive reuse projects will be limited in their density to currently permitted densities in the zoning district, that unacceptable impacts (noise, odors, nuisances, etc.) will not be allowed, that the landscaping will be required to be in character with the building and the location, and that the public need is to encourage the expansion and promotion of small businesses and the maintenance and reuse of existing structures in the unincorporated County.

Sincerely,

Kent County Planning Commission

Joe Hickman, Chairman

c: Shelley L. Heller, County Administrator

THE COUNTY COMMISSIONERS OF KENT COUNTY, MARYLAND

**December 19, 2023
Legislative Session Day**

**Legislative Session Day
December 19, 2023**

**CODE HOME RULE
BILL NO. X-2023**

INTRODUCED BY: Ronald H. Fithian, President of the Board of County Commissioners for Kent County, Maryland.

AN ACT to amend Chapter 222, Zoning, of the Code of Public Local Laws of Kent County, Maryland, also known as the Kent County Land Use Ordinance, in order to add a new land use and to permit said new use in a single district as a special exception: (1) by adding “2.5 Adaptive reuse of existing structures in AZD, located on parcels under 20 acres” to Article V. District Regulations, Section 1. Agricultural Zoning District, §1.3 Special Exceptions; (2) by adding said new land use as “6. Adaptive reuse of existing structures in AZD, located on parcels under 20 acres” to Article VII. Special Exceptions, Section 6. Procedures, un-numbered second paragraph regarding those special exceptions that may be approved by the Planning Director; (3) by adding six specific conditions, indicated as A through E, for said new land use in “3.5 Adaptive reuse of existing structures in AZD, located on parcels under 20 acres” to Article VII. Special Exceptions, Section 7. Special Exceptions; and (4) by including one non-codified provision.

THE COUNTY COMMISSIONERS
OF KENT COUNTY, MARYLAND

Ronald H. Fithian, President

INTRODUCED, read the first time, December 19, 2023, ordered posted and public hearing scheduled on Month Date, 2024, at time a.m. / p.m. in the County Commissioners Hearing Room, R. Clayton Mitchell, Jr., Kent County Government Center, 400 High Street, Chestertown, Maryland.

By order of:

Sondra M. Blackiston, Clerk

PUBLIC HEARING

HAVING been posted and notice of the time and place of the hearing and copies having been made available to the public and the press, a public hearing was held on Month Date, 2024. Reported favorably [with] [without] amendments; read the second time and ordered to be considered on Month Date, 2024, a legislative session day.

BILL NO. X-2023

CAPITALS & BOLD INDICATES MATTER ADDED TO EXISTING LAW.

~~Strike through~~ indicates matter deleted from existing law.

**A BILL ENTITLED CHR ~~X~~-2023 ADAPTIVE REUSE OF EXISTING
STRUCTURES IN AZD, LOCATED ON PARCELS UNDER 20 ACRES**

**NOW, THEREFORE, BE IT ENACTED BY THE COUNTY COMMISSIONERS OF
KENT COUNTY, MARYLAND THAT THE KENT COUNTY LAND USE ORDINANCE IS
HEREBY AMENDED AS FOLLOWS:**

SECTION 1.

**ARTICLE V.
DISTRICT REGULATIONS**

SECTION 1. AGRICULTURAL ZONING DISTRICT (AZD)

...

1.3 Special Exceptions

...

1. Accessory storage structures with a floor area of more than 1,200 square feet or a height that exceeds 17 feet on parcels less than 5 acres

2. Accessory structures in the front yard of through lots

**2.5 ADAPTIVE REUSE OF EXISTING STRUCTURES IN AZD, LOCATED ON
PARCELS UNDER 20 ACRES**

3. Adaptive reuse of historic structures

...

SECTION 2.

**ARTICLE VII.
SPECIAL EXCEPTIONS**

SECTION 6 PROCEDURES

The application for a special exception shall include a site plan together with such data and information as may be required for a determination of the nature of the proposed use and its effect on the Comprehensive Plan, the neighborhood, and surrounding properties.

The Planning Director may hear and decide the following special exceptions:

1. Accessory storage structures

2. Accessory structures in the front yard requirement of waterfront parcels

3. Accessory structures in the front yard of a through lot or corner lot

4. Assisted living facilities with five to eight beds

5. Day care group

**6. ADAPTIVE REUSE OF EXISTING STRUCTURES IN AZD, LOCATED ON
PARCELS UNDER 20 ACRES**

...

SECTION 3.

ARTICLE VII. SPECIAL EXCEPTIONS

SECTION 7. SPECIAL EXCEPTIONS

...

1. Accessory storage structures with a floor area of more than 1,200 square feet or a height that exceeds 17 feet on parcels less than 5 acres in AZD, RCD, RC, RR, CAR, and CR.
2. Accessory structures in the front yard of through or corner lots in AZD, RCD, RC, RR, CAR, CR. V, IV, and IVCA.
3. Accessory structures in the front yard requirement of waterfront parcels in RCD and CAR.

3.5 ADAPTIVE REUSE OF EXISTING STRUCTURES IN AZD, LOCATED ON PARCELS UNDER 20 ACRES:

- A. THE SITE WILL HAVE ACCESS TO A PUBLIC ROAD ADEQUATE FOR THE TRAFFIC GENERATED;**
- B. THE PROPOSED USE WILL NOT GENERATE TRAFFIC OF A TYPE OR AMOUNT INAPPROPRIATE FOR ACCESS ROADS AND THE SURROUNDING AREA;**
- C. THE USE DOES NOT REQUIRE ROAD IMPROVEMENTS DETRIMENTAL TO THE CHARACTER OF THE AREA;**
- D. THE PROPOSED USE DOES NOT CREATE AN UNACCEPTABLE IMPACT BY WAY OF NOISE, ODOR, NOXIOUS MATERIALS OR OTHER NUISANCES; AND**
- E. LANDSCAPING IS IN KEEPING WITH THE CHARACTER OF THE BUILDING OR LOCATION.**
- F. THIS MAY BE REVIEWED VIA AN ADMINISTRATIVE SPECIAL EXCEPTION PROCESS.**

4. Adaptive reuse of historic structures in AZD, RCD, RC, RR, CR, V, IV, IVCA, and M provided:

...

SECTION 4. BE IT FURTHER ENACTED by the County Commissioners of Kent County that this Act shall take effect on the _____ day of _____, 2024.

Read Third Time _____

PASSED this _____ day of _____, 2024.

Failed of Passage _____

By order of:

Sondra M. Blackiston, Clerk

THE COUNTY COMMISSIONERS
OF KENT COUNTY, MARYLAND

(SEAL)

Ronald H. Fithian, President

Albert H. Nickerson, Member

John F. Price, Member

ORDERED a fair summary thereof or the entire bill shall be published in at least one newspaper of general circulation in the County, not less than three times at weekly intervals within a four-week period.

BILL NO. **X**-2023

CAPITALS & BOLD INDICATES MATTER ADDED TO EXISTING LAW.

~~Strike through~~ indicates matter deleted from existing law.

**APPLICATION FOR TEXT AMENDMENT TO THE
KENT COUNTY LAND USE ORDINANCE
KENT COUNTY, MARYLAND**

Kent County Department of Planning, Housing and Zoning

Kent County Government Center
400 High Street • Chestertown, MD 21620
410-778-7423 (phone) • 410-810-2932 (fax)

Pursuant to Article XII, "Administrative Procedures" Section 6, "Amendments", of the Kent
County Land Use Ordinance, I/We Edward Michael Granger

Applicant's Name

of 10720 Augustine Herman Highway, Chestertown, MD 21620

240-538-8468

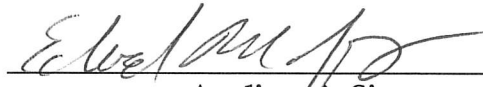
Address

Telephone Number

hereby petition the Kent County Commissioners to amend the Land Use Ordinance of Kent County,
Maryland, as follows: Amend Article V, District Regulations, Section 1 Agricultural Zoning
District and Article VII Special Exceptions to add adaptive reuse of existing structures in AZD, parcels
under 20 Acres. See attached.

The purpose of the proposed amendment is to permit: _____

Home Improvement business to operate out of 10720 Augustine Herman Highway, Chestertown, MD 21620


Applicant's Signature

September 13, 2023

Date

Please Note: The application for an amendment to the text of this Ordinance shall, at a minimum state in particular, the Article, Section, and paragraph sought to be amended. The application shall contain the language of the proposed amendment.

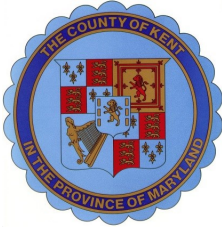
Instructions: The application shall be accompanied by \$500.00 filing fee, payable to the County Commissioners of Kent County.

For Office Use Only:

File Number _____
Date Filed _____
Date Referred to Planning Commission _____
Date Recommend. Rec'd from Plan. Comm. _____
County Comm. Public Hearing Date _____
County Commissioners Action _____
Date of Action _____
Property Posted _____

Adaptive reuse of existing structures in AZD, located on parcels under 20 acres.

- (A) The *site* will have access to a public road adequate for the traffic generated;
- (B) The proposed use will not generate traffic of a type or amount inappropriate for access *roads* and the surrounding area;
- (C) The use does not require road improvements detrimental to the character of the area;
- (D) The number of *dwellings* will not exceed the *density* permitted in the district in which the *structure* is located;
- (E) The proposed use does not create an unacceptable impact by way of noise, odor, noxious materials or other nuisances; and
- (F) Landscaping is in keeping with the character of the *building or location*.
- (G) This may be reviewed via an administrative special exception process.



**Jeremy J. Rothwell and Jennifer Moore, Kent County Historic
Preservation Commission**

12/19/2023

County Commissioners Meeting

Item Summary:

The Granary, Turner's Creek Public Landing

ATTACHMENTS:

Description

12.19.23 Jeremy Rothwell, Kent County Historic Preservation Commission, Email Correspondence

12.19.23 Eric R. Ober, Associate Principal, Simpson Gumpertz & Heger, Preliminary Assessment – The Granary, Turner's Creek Public Landing, Kennedyville, MD

12.19.23 Barton Ross, President, Barton Ross & Partners, LLC Architects, The Granary, Turner's Creek Public Landing, Kennedyville, MD, Architectural Professional Services Proposal

From: Jeremy Rothwell <rothwell@udel.edu>
Sent: Monday, December 4, 2023 12:45 AM
To: Shelley Heller <sheller@kentgov.org>
Cc: William Mackey <wmackey@kentgov.org>; Jennifer Moore
<JMoorePRS2007@gmail.com>
Subject: Turners Creek Granary Report

ATTENTION!

This email originated from an external source. DO NOT CLICK any links or attachments unless you recognize the sender and know the content is safe.

- KCIT Helpdesk

Shelley,

I hope that you have been doing well and had an enjoyable Thanksgiving holiday. This past week, we received back the final report from SGH of the abbreviated structural inspection and analysis for the granary. This report outlines the big picture structural issues, and how they can be rectified and rehabilitated. Following up on this, I immediately contacted Barton Ross, a noted preservation architect that formerly served on the Kent County HPC, and asked that he put forward a proposal to complete an in-depth preservation plan with signed and sealed architectural building plans for the actual renovations to be constructed. He is willing to complete a formal preservation plan for \$25,000 (which I believe to be a below market price). About two weeks ago, the Kent County Historical Society voted to provide up to \$2,500 to complete said preservation plan for the granary (although I am still waiting for their formal letter). As I had previously emailed to you, the National Trust for Historic Preservation may be able to contribute out-of-round emergency funding from their Bartus Trew endowment to assist the County pay for a preservation plan. Jennifer Moore and I will be meeting with a third-party non-profit this coming Wednesday evening to discuss their potential adaptive reuse of the granary to provide environmental education and tourism (similar to what Wayne Gilcrest previously provided). When would you like us to present all of these findings and proposals to the County Commissioners. Please call or email me directly if you have any questions or concerns.

Best regards,

Jeremy Rothwell, AICP

Cell: (410) 920-4574

27 November 2023

Ms. Laura Houston
Director of Revitalization Initiatives
Preservation Maryland
3600 Clipper Mill Road
Suite 248
Baltimore, MD 21211

Preliminary Assessment – The Granary, Turner’s Creek Public Landing, Kennedyville, MD

Dear Ms. Houston:

We recently completed a preliminary assessment of the existing Granary in response to your request. This brief letter is our preliminary assessment report.

1. BACKGROUND

The Granary is a historic structure that is listed in the Maryland Inventory of Historic Places (MIHP) administered by the Maryland Historic Trust (MHT). Based on the Architectural Survey File from MHT, the building dates to the 1850s and is one of the few standing grain warehouses which were an integral part of the early Maryland agricultural economy. The structure is wood framed and has a gabled roof. The gabled ends are at the north (facing Turner’s Creek) and south.

The building is owned by Kent County and has had various uses over the years. The building has been unoccupied for an extended period, and Kent County is considering options for the building ranging from demolition to rehabilitation and relocation. We do not directly address relocation in this letter but many of the comments are applicable.

2. DOCUMENT REVIEW

We reviewed several documents to inform our work. We list them and a summary of each.

1. Subsurface Exploration, dated 29 April 2009, prepared for Gredell & Associates by GEO-TECHNOLOGY ASSOCIATES, INC (GTA).
 - GTA visually examined the existing building, dug three test pits, and drilled three borings.
 - GTA identified existing rubble stone foundations supporting wood sills at the north and south gable ends and at interior bearing walls running east/west. They found no foundation walls under the east and west exterior walls. Wood sills were rotten.
 - Existing foundations at the north and east sides were partially bearing on existing concrete deadmen anchoring tiebacks for the bulkhead sheeting.
 - GTA refers to a condition assessment report prepared by Gredell & Associates (which was not provided to us), noting that temporary shoring was planned until new foundation construction could be installed.
 - GTA recommended cribbing or concrete foundations bearing at grade to support temporary shoring. GTA recommended permanent foundations comprised of shallow spread and continuous footings or deep foundations (driven wood piles or helical piers). GTA also recommended that foundations should be designed to avoid interaction with the existing deadmen.
Note: A "deadman" is a buried concrete foundation element used to restrain lateral movement of flexible retaining walls such as bulkheads).
2. Drawing S-1, "Tempoorary Shoring," dated 5 May 2009, prepared by Gredell & Associates.
 - The drawing depicts temporary shoring comprised of wide flange steel needle beams at the north and south gable end walls and at three interior locations supported on timber cribbing external to the structure.
 - Sawn lumber and plywood are specified to be pressure treated. Treatment is not specified for cribbing timbers.
3. Bulkhead Repair Drawings, dated 2 April 2018, prepared by Gredell & Associates (included in RFP #PL 21-02, undated, issued by Kent County).
 - New sheeting was constructed on the water side of the existing bulkhead to encapsulate the existing construction.
 - New tie rods were anchored to the existing deadmen.

- The deadmen on the north and east sides are depicted beneath the Granary foundation.

3. LIMITED CONDITION ASSESSMENT

We conducted a limited condition assessment of the building on 25 October 2023. Also present on site were Jennifer Moore (Kent Country Historic Preservation Commission), Mike Moulds, P.E. (Director of Public Works, Kent County), Gary Gredell, P.E. (Gredell & Associates), and Will Bontrager (journalist, Kent County News).

We summarize our visual observations below:

- The building appears to be visibly plumb (without readily visible lean) (Photo 1).
- Wood cribbing supporting the steel needle beam shoring is rotten and no longer supports the steel. The needle beams are rusted but we did not see substantial section loss (Photos 2 and 3).
- The existing enclosure is damaged. Wall boards and roofing are missing at the northwest corner (Photo 4). The exposed wood framing is deteriorated (Photo 5). There are also holes in the roofing at two locations at the west side eave (Photo 6).
- Wood rafters exposed at the eaves and wood siding appear to be in poor condition (Photo 7).
- Interior wood framing at grade is in poor condition (Photo 8). Some interior wood framing above grade is also in poor condition (Photos 9 and 10). There is evidence of interior foundation/support movement or deterioration (Photo 11).
- Much of the interior framing under the roof and above grade appears to be in sound condition (Photos 12 and 13).

4. DISCUSSION

The building is standing but has significant issues:

- Existing temporary shoring (installed based on the 2009 design by Gredell & Associates) was left in place for approximately fourteen years without adequate maintenance. The shoring is no longer effective and rests on, rather than supports, the existing structure.

- The existing roof and wall coverings have not been maintained/repared adequately, leading to areas of severe deterioration. In particular, the wood wall and floor framing at the northwest corner are in extremely poor condition. Current conditions were not thoroughly examined but continued exposure and deterioration will eventually result in instability.
- Framing at or just above grade, especially near the perimeter walls and interior foundations, is in poor condition. We presume these conditions were present (but likely not as advanced) when Gredell & Associates designed temporary shoring in 2009.
- Framing supporting the second floor and roof which were protected from exterior exposure appears to be suitable to remain in service with limited exceptions in the areas which show termite damage.

Despite the extent of framing deterioration, we believe the structure can be rehabilitated in place to serve a new purpose. A large proportion of the structural framing appears to be suitable to remain in service, though substantial work is necessary in the building enclosure and in the lower portion of the structure. We offer a conceptual outline approach to rehabilitation in the following:

- Determine a suitable and desired use for the building.
- Re-establish the existing temporary shoring to functional status.
- Conduct a detailed condition assessment to update the Gredell & Associates report from approximately fifteen years ago.
- Develop a rehabilitation design and allocate funding for the work. We do not have sufficient information to evaluate whether repair rather than replacement of foundations is feasible. We assume new foundations are required as implied by GTA and that they will be designed to avoid conflicts with the existing deadmen. We also assume some mechanical, electrical, and/or plumbing systems will need to be added to the building.
- Implement the rehabilitation design and occupy the building.

5. RECOMMENDATIONS

We recommend that Kent County consider the best use of the existing Granary and institute a rehabilitation project consistent with the outline approach presented in Section 4.

We appreciated the opportunity to work with you on this property. Please let us know if you have any questions.

Sincerely yours,

A handwritten signature in black ink, reading "Eric R. Ober". The signature is written in a cursive, flowing style with a large initial "E" and "O".

Eric R. Ober, P.E.
Associate Principal
MD License No. 43366



Photo 1 – South elevation.



Photo 2 – Deteriorated
cribbing.



Photo 3 – Deteriorated
cribbing.



Photo 4 – Hole at northwest
corner.



Photo 5 – Deteriorated wood framing at northwest corner.



Photo 6 – View of west side openings in roof.



Photo 7 – East elevation sheathing and exposed rafters.



Photo 8 – Deteriorated framing at ground floor.



Photo 9 – Deteriorated girder and brace.



Photo 10 – Deteriorated joist.



Photo 11 – Note displacement of brace from joist (exposed tenon).



Photo 12 – Floor framing.

Barton Ross & Partners LLC

Architects

December 1, 2023

Jeremy Rothwell, Chair
Kent County Historic Preservation Commission
400 High Street
Chestertown, MD 21620
(410) 920-4574

Delivered via email only at rothwell@udel.edu

Re: The Granary, Turner's Creek Public Landing, Kennedyville, MD
Architectural Professional Services Proposal

Dear Mr. Rothwell,

Barton Ross & Partners, LLC Architects (BRPA) is pleased to provide the Kent County HPC (County) with this proposal for the preparation of a mini-preservation plan and historic rehabilitation Architectural Professional Services for the Granary, Turner's Creek Public Landing, near Kennedyville, MD. We are happy to work with Eric Ober, PE of Simpson Gumpertz & Heger, Inc., who have already provided a preliminary report or Jay Silcox, PE, both firms we have a great deal of experience working with on historic projects.

Qualifications

Barton Ross & Partners, LLC Architects (BRPA) is a design practice which has served as planning, preservation, and construction consultant to numerous nonprofits, companies, and municipalities across the Mid-Atlantic region. BRPA has successfully worked with MHT and Preservation MD staff on historic buildings owned by historical societies and organizations across the State of Maryland. Barton Ross is a licensed historic architect and planner per the Secretary of the Interior's Code of Federal Regulations, 36 CFR Part 61. His previous work with historic buildings has been recognized by the National Park Service, the National Trust for Historic Preservation, and the Secretary of the Interior. Barton previously served as the chair of AIA Maryland's Historic Resources Committee, chair of Chestertown's Façade Improvement Panel, and sat on the Kent County Historic Preservation Commission. He is a graduate of the Virginia Tech School of Architecture + Design, received a Master of Science in Historic Preservation from the University of Pennsylvania and holds a Master's Degree in Construction Administration from Columbia University.



CERTIFICATE OF APPRECIATION

Barton Ross, AIA

*In recognition and appreciation for your service to preserve
the past while mentoring our future.*


President, AIA Maryland
December 10, 2023



Scope of Basic Services

BRPA shall perform its services consistent with the professional skill and care ordinarily provided by architects practicing in the same or similar locality under the same or similar circumstances. BRPA shall perform its services as expeditiously as is consistent with such professional skill and care and the orderly progress of the Project. The property is located in Kennedyville, Kent County, Maryland and any alterations will eventually need to be approved through the county's local zoning and permitting process. BRPA's Scope of Services will not include furniture selection, drapes or window treatments, MEP design, Fire protection/sprinkler design, security system design, furniture selection, drapes or window treatments, exterior landscape design, Civil Engineering (Paving, Grading & Drainage), special museum lighting, exhibit design in the building, or graphic/signage design for the center, although any of these services could be coordinated by the Architect as part of Additional Services if requested by County. BRPA will provide the following consulting tasks:

Task 1: Existing Conditions & Mini-Preservation Plan Phase

BRPA will visit the above referenced site, take photos and existing conditions measurements and gain an understanding of the historic evolution of the house. BRPA will prepare existing conditions drawings including site, floor plans and principal elevations. Drawings to locate and identify all building shell elements (exterior walls, windows, doors and other openings) and interior core elements (load bearing walls, columns, and stairways) as well as interior partitions. All drawings will be 24x36 size. The description of the resources will identify and comment on the character defining features and will be accompanied by exterior and interior photographs. The work will not include investigating the septic system or performing a well test per Kent County Environmental Health Dept.

BRPA will prepare a short document and include the following sections in a mini-Preservation Plan Report:

- Cover page
- Table of Contents
- Executive Summary
- Developmental History with historical context
 1. BRPA will prepare a chronology of construction followed by an outline chronology of known dates. The outline should be divided into periods, usually associated with owners or major construction events. Clear reproductions of historic photographs, images, and diagrammatic drawings, which illustrate the evolution of the property, will be presented with captions and referenced in the narrative.
 2. Significant architectural features that should be preserved or restored in future work will be noted.
- Description of existing conditions
 1. The Plan will include an analysis of the existing site and all extant buildings including photographs. It will address the significance of the site, chronology of alterations and use, prior treatments and use, copies of maps, illustrations, and photographs of the site, and recommendations for future research.
 2. The description of the resources will identify and comment on the character defining features and will be accompanied by exterior and interior photographs. In addition to overall photographs, there will be shown details of significant moldings, decorative features, stairs, windows, fireplaces, hardware, and mechanical elements, etc.
 3. BRPA will prepare an analysis of existing conditions, citing in particular any perceptible damage, structural problems and material deterioration. BRPA will provide a detailed description of the strategies for architectural conservation of the structure.

4. Develop Existing Architectural Floor Plans of the structures. Develop comprehensive “as-is” floor plans for all levels. Drawings to locate and identify all building shell elements (exterior walls, windows, doors and other openings) and interior core elements (load bearing walls, columns, and stairways) as well as interior partitions; fixed plumbing and appliances at toilet rooms and kitchens;
 5. Develop Existing Architectural Exterior Elevations. Develop comprehensive “as-is” exterior elevations for all four exposures. Create exterior elevations to a high of detail representing all masonry or perimeter openings with window and door frames and trim; roof edges; water table and stone or other masonry banding, gutters, downspouts and canopies. Provide key annotations including finish materials, floor elevation markers and floor to floor heights.
- Work recommendations containing philosophies, objective, treatments and cost estimate.
 6. The Report will include a discussion of the preservation, restoration, or rehabilitation objectives that guide the recommendations. The philosophy will provide a clear rationale for the recommended treatments that follow. The four approaches to the treatment of historic properties: preservation, rehabilitation, restoration, and reconstruction, including adaptive use will be addressed.
 7. BRPA will address the specific needs and long-term objectives of the project. This includes how the building is to be maintained, its current uses, and its proposed uses.
 8. BRPA will prepare recommendations based on historical research and a careful physical evaluation. BRPA will consider codes, use requirements, life safety, and accessibility.
 9. The Report will achieve long-term relevance by explaining the approach and methodology guiding and informing the document. The Report will clearly state the rationale used when presenting recommendations to ensure future users of the document understand why certain recommendations were made and to build upon the document.
 - 10. Cost Estimate to proceed with the proposed work.
- Photographic documentation

Task 2: Design Development Phase

BRPA shall prepare Design Documents indicating requirements for construction of the Project and shall coordinate its services with any consultants provided. This work will include design drawings with notes and dimensions, written material specifications; etc.

- BRPA will review all relevant documents and photographs available to understand the history of the existing materials and building evolution. This review will help inform the selected materials and cleaning/repair specifications proposed. BRPA will incorporate findings from all these documents into the project.
- BRPA will reach out and engage with Kent County stakeholders for design input and feedback.
- BRPA will develop a plan of action for the work based on the available documentary research, physical inspection, and current code requirements using the Existing Building Section of the International Building Code (IBC).
- BRPA will prepare detailed design drawings, details and specifications as required for the historic repairs on the building per the Secretary of the Interior Standards for Rehabilitation, latest version.

- Engineer will prepare analysis, calculations and design for new structural members to support the building and new floors, and also propose any design stabilization for the walls, wood framing, and roofing construction, if required.

Task 3: Bidding, Approvals & Permitting Phase

BRPA will provide assistance to County in bidding and permitting the project. This includes soliciting bids from local contractors who are qualified in historic preservation. BRPA will assist with the preparation of Bid Notices and answer any Contractor communications or other questions. This task includes Project Administration/Site Meetings, Review with Building Department, AIA Contract drafts and review, Respond to Comments/Revision sets, 1 round of design revisions, Prepare and Issue Addenda, Notice to Proceed, material substitutions, etc.

Task 4: Construction Phase

BRPA shall consult with County's construction contractor (Contractor) to coordinate the Project design, approve payments, and answer all construction-related questions as they arise during the job. This will ensure all built work complies with the drawings and specifications. This task includes research with material manufacturers, Monthly Construction Administration & Field Observation, Response to Contractor Questions (RFIs), Punch List & Project Closeout, Shop Drawing Review & Processing, Preparation of Warranties, draft Release of Lien forms, grant administration work and electronic document and progress photo inventories, etc. The selected contractor is responsible for all permitting applications, inspections, and approvals with government entities. Includes 2x CA site visits.

Cost Proposal

BRPA will provide architectural and engineering construction documents necessary to implement the above description of work. We can also provide assistance in bidding and permitting the project and provide construction phase observation for a Basic Service Fixed, Not-to-Exceed Fee in the amount of \$25,000 (twenty-five thousand dollars). The design/ architectural/ engineering fee is as follows:

Task 1: Existing Conditions, Mini-Pres Plan -	\$ 7,500.00
Task 2: Construction Documents -	\$ 12,500.00
Task 3: Bid & Permit, Revise, Approvals -	\$ 1,500.00
Task 4: Construction Phase Observation -	\$ 3,500.00
Total Fixed A/E Fee -	\$ 25,000.00

Please make all checks payable to "Barton Ross & Partners LLC". All invoices for both labor and reimbursable expenses will be due and payable within 30 days. Any invoices which remain unpaid after sixty days from the date of the invoice will accrue interest at the rate of 1.50% per month. If payment is not received within that period, work will cease. Work will restart with payment of the balance due. We reserve the right to withhold services and documents, and/or file a lien on the real property pending receipt of payment in full. In the event any portion of an account remains unpaid 60 days after billing, the costs of collection, including reasonable attorneys' fees will be billed, and due upon receipt of the invoice.

Reimbursable Expenses

The following reimbursable expenses will be billed to the Owner, at the rates shown below, in addition to contracted fees described above; they include all expenses incurred by the Architect and the Architect's Employees and Consultants when working in direct interest of the project.

Mileage.....	IRS rate
Color Printing and B&W Reproductions.....	(1.15)x cost
Project Materials.....	(1.15)x cost
Postage and Overnight Mailings.....	(1.15)x cost
24x36 B&W Drawing Prints.....	\$5.00/sheet

Additional Services

All services not specifically indicated in the scope of "Basic Services" above or any significant additions to our scope of professional services contemplated in this proposal, meetings in excess of those indicated herein, consultation or changes to work already accomplished shall be considered Additional Services. Additional Services, if requested, will be performed, as authorized by County, pursuant to an amended proposal only. This includes site visits, meetings, and revisions as outlined above per the county.

The Contractor will be responsible for following all design documents, preparing all permitting applications and inspection approvals with government entities. If Owner requests BRPA's participation in any additional zoning/permitting meetings with government representatives, then the meeting time and preparation for said meetings will be invoiced as an hourly service, as the length and purpose of which cannot be adequately determined at this time. This includes but is not limited to zoning/planning hearings, historic preservation /design reviews, FEMA insurance, meetings with the construction official or fire marshal, final approvals, Owner initiated design changes following bidding, etc.

Services by Others

BRPA will coordinate project design with any consultants hired by the County, or Contractor; however, we take no responsibility for their engineering solutions, designs or any work performed by others not affiliated with BRPA. It is also understood that all construction and the conformance of the construction to the drawings and Building Code will be the responsibility of the County's Contractor. It will be the Contractor's responsibility to assure that all required inspections have been completed prior to continuing with subsequent construction work. It is recognized that any site observations performed by BRPA shall not be considered inspections and in no way do they relieve the Contractor from his responsibility to construct in accordance with the contract documents and applicable Building Codes.

Terms and Conditions

This agreement shall be governed by the laws of Maryland, the place where the project site is located. Claims or disputes shall be decided through construction mediation in accordance with the industry rules of the American Arbitration Association currently in effect in MD. If the project results in legal action on the part of the property owner or architect is requested or compelled to participate in said legal action through the preparation of documents, direct testimony or any other means, those services are to be provided as an additional cost to County. This agreement shall be immediately effective after the proposal has been accepted in writing by the County. BRPA shall maintain liability insurance and the policy will include an endorsement for Kent County, its officials, directors, employees, and volunteers. Barton Ross & Partners, LLC retains all rights to copyright for all documents and instruments of service produced by BRPA. The copyright and other intellectual property rights in all documents, including electronic versions thereof, shall remain vested in BRPA; however County shall have free license to use such of those documents as are supplied for purposes for which the documents were prepared. Any liability arising out of use by County or any third party of said documents shall be the responsibility of County. BRPA retains the right to include digital and photographic representations of its work product among BRPA's promotional and professional material. BRPA shall have no responsibility for the handling, removal or disposal of, or exposure of persons to hazardous substances whether known or unknown in any form presently located at the project site including, but not limited to, mold, asbestos, asbestos products, polychlorinated biphenyl (PCB), radon, lead, or other toxic substances. BRPA shall have no responsibility for hidden or existing conditions, the client will be responsible for any risks associated with the existing structure, and BRPA shall not be responsible for any resulting damages to persons or property.

We appreciate this opportunity and are eager to begin work with Kent County. If you require any additional information or clarification, please do not hesitate to call us. We look forward to working with you on this important project.

Sincerely yours,

Barton Ross & Partners, LLC Architects



Barton Ross, AIA, AICP, LEED AP BD+C
President

Enclosures

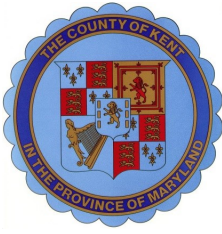
Acknowledgement and authorization is hereby given

Name (please print): _____

Representing: _____

Signature: _____

Date: _____



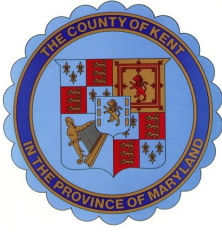
Dan Mattson, Deputy Director, Public Works
12/19/2023
County Commissioners Meeting

Item Summary:

Engineering - Status of Courthouse Lobby Expansion Design

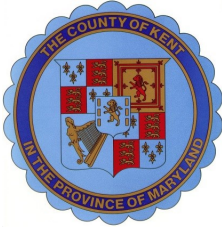
ATTACHMENTS:

Description



Jamie Williams, Director, Economic and Tourism Development
12/19/2023
County Commissioners Meeting

Item Summary:
Short-term Rental Update



**Jamie Williams, Director, Economic and Tourism Development and
Rick Carter, Owner/Operator, Delmarva Craft
12/19/2023
County Commissioners Meeting**

Item Summary:

2023 Seasonal Shuttle Update

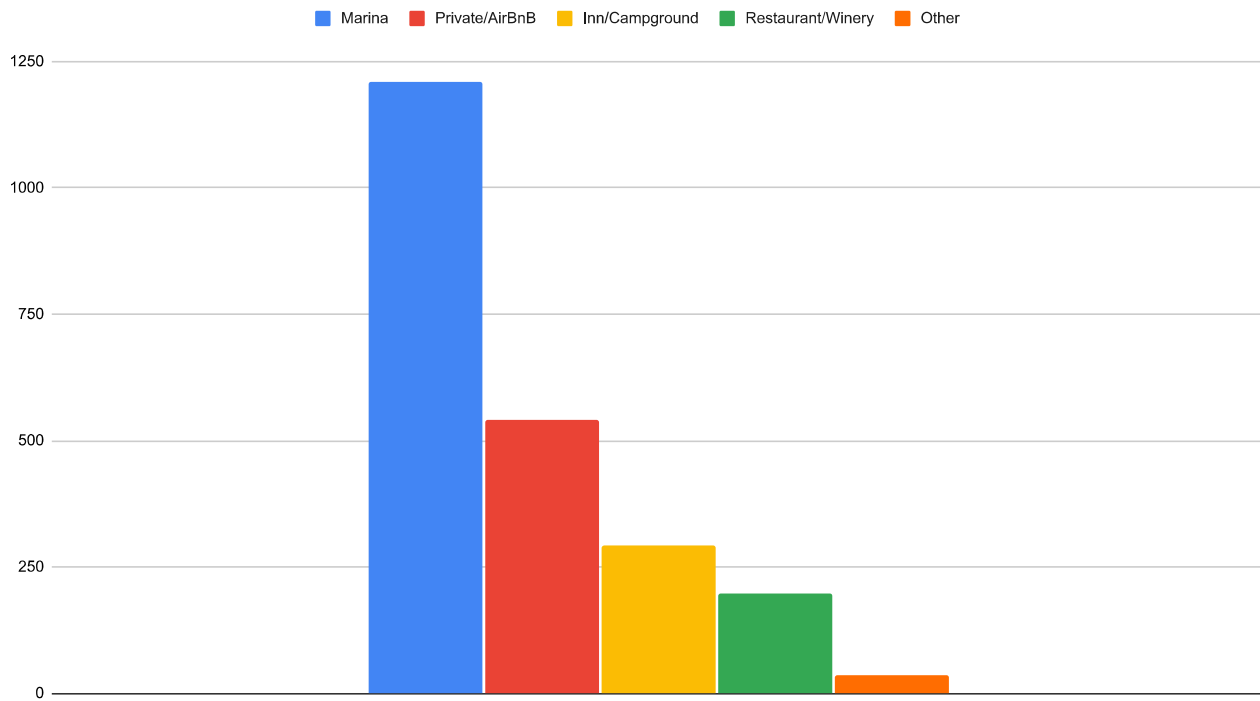
ATTACHMENTS:

Description

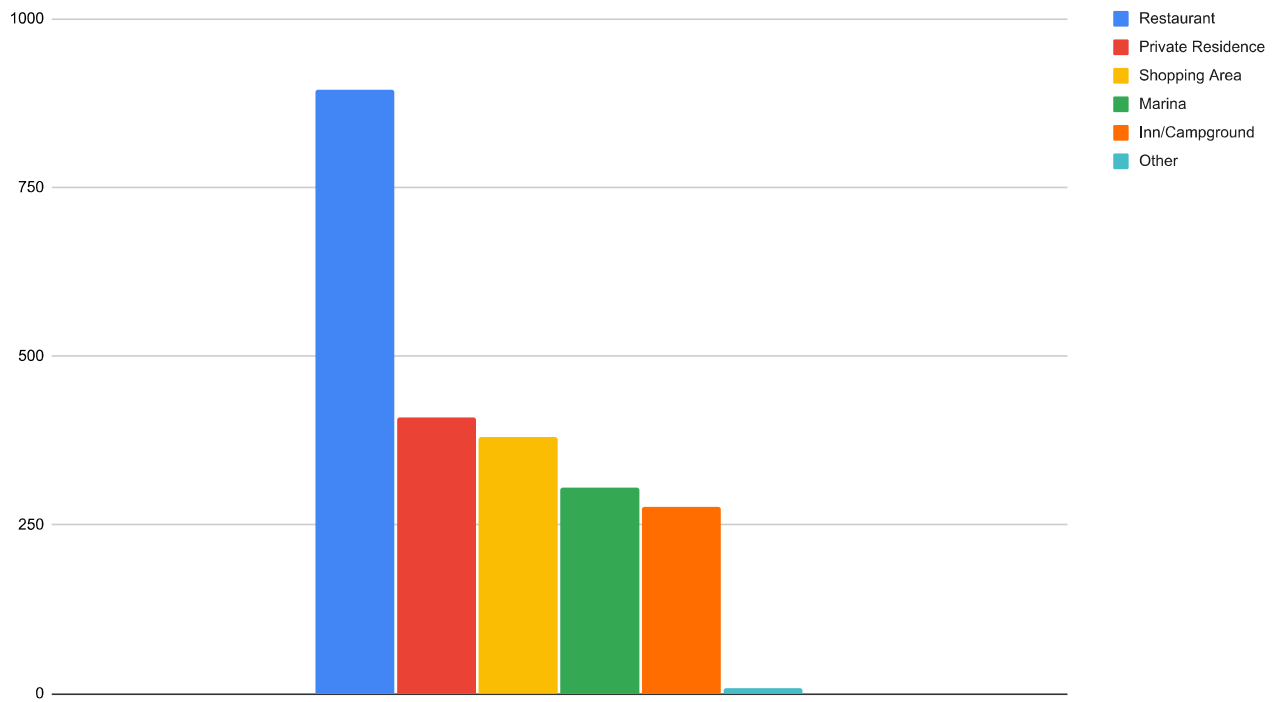
12.19.23 Seasonal Shuttle Data

Top Initial Destinations			Top Pick Up		
Harbor Shack	298	13.10%	Haven Harbour North	520	22.87%
Private Residence/Other	225	9.89%	Private Homes/AirBnb	330	14.51%
Watermans	223	9.81%	Osprey Point	238	10.47%
Blue Heron	205	9.01%	Comfort Inn	213	9.37%
Chestertown	182	8.00%	Haven Harbour South	175	7.70%
Main Street	171	7.52%	Crow Vineyard	125	5.50%
Inn at Huntingfield Creek	156	6.86%	Rock Hall Landing Marina	105	4.62%
Events at Private Homes	155	6.82%	Georgetown	85	3.74%
Brittland	97	4.27%	Chestertown	84	3.69%
Haven Harbour South	93	4.09%	Tolchester	70	3.08%
Tolchester	74	3.25%	Galena	42	1.85%
Osprey Point	51	2.24%	Lankford Bay Marina	35	1.54%
Haven Harbour North	45	1.98%	Bay Shore Campground	30	1.32%
Fishing Charters	42	1.85%	Blue Heron	30	1.32%
Bay Wolf	34	1.50%	Watermans	28	1.23%
Muskrat Alley	28	1.23%	Inn at Huntingfield Creek	26	1.14%
Bayside Market	28	1.23%	Main Street	25	1.10%
Watershed Alley	27	1.19%	Swan Creek	21	0.92%
Georgetown	26	1.14%	North Point Marina	19	0.84%
Bulkhead-Watermans Day	23	1.01%	Grays Inn Creek	16	0.70%
American Legion	16	0.70%	Harbor Shack	14	0.62%
Maggies	16	0.70%	Broad Neck	10	0.44%
Kitty Knight House	13	0.57%	Sunset Lodge	10	0.44%
Fords	10	0.44%	Mitchell House	7	0.31%
Imperial Hotel	10	0.44%	Great Oak	6	0.26%
The Rock	6	0.26%	Black Duck	4	0.18%
Rock City Cafe	5	0.22%	Bulkhead	4	0.18%
Chester River Crabs	4	0.18%	Brampton	2	0.09%
Eastern Neck	4	0.18%		2274	100.00%
RHVFC	3	0.13%			
Edesville	3	0.13%			
Urgent Care	1	0.04%			
	2274	100.00%			
1) The volume of riders is down almost 10% from 2022.					
2) The total number of trips is down almost 15% from 2022					
3) The season started incredibly well. The first 4 weeks had more than twice the volume of riders as the same period in 2022.					
4) The next 7 weeks were significantly below 2022 levels.					
5) The middle two weeks of August provided a surge in ride levels, above 2022 numbers.					
6) There were 3 solid weeks in September/October that can be directly attributed to a number of large weddings in the Rock Hall and Chestertown area					
7) The number of "routine" riders has declined by 685 people. This includes the people who simply call and ask for a ride from one location to another					
Many people are now using bicycles, scooters, golf carts and walking					
8) The number of riders who were part of a group that called in advance to arrange transportation has risen by 446.					
Notably, these numbers are higher in May, June, September & October					
9) There were 187 Passengers and 257 rides provided prior to the data listed in this chart. We agreed to assist with transportation					
between Crow Vineyard and Inn at Huntingfield Creek,					
as well as working with a group that were in town for a wedding / a tour for friends and Family from the UK.					

Type of Pick Up Location



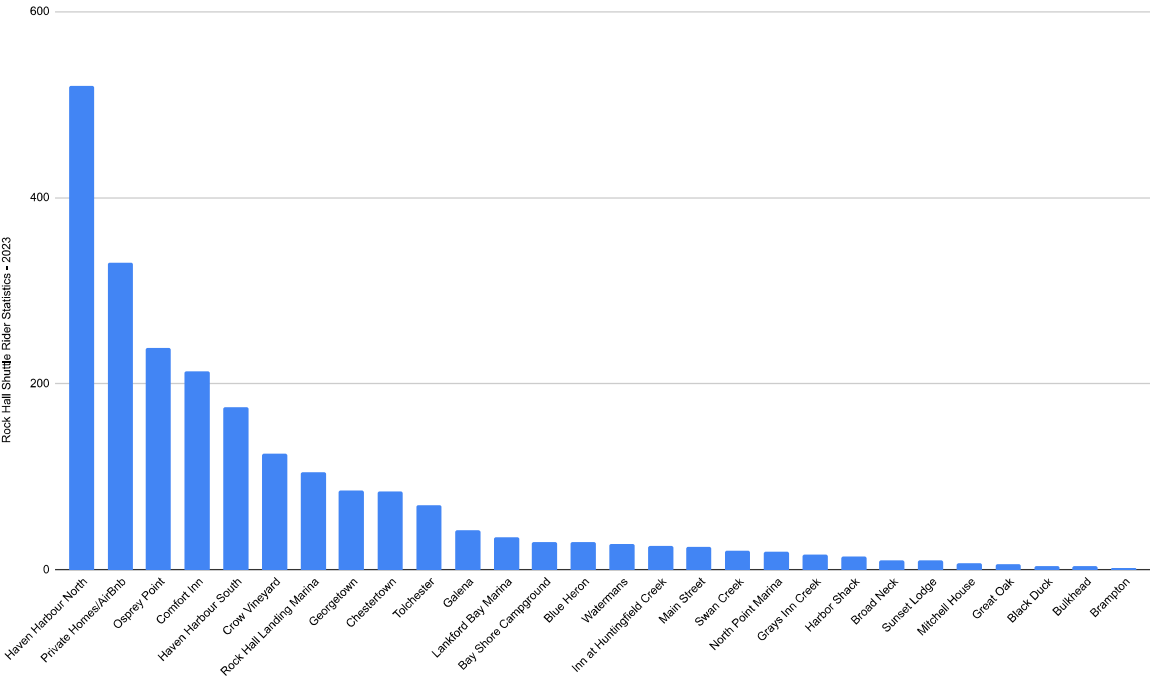
Type of Drop Off Location



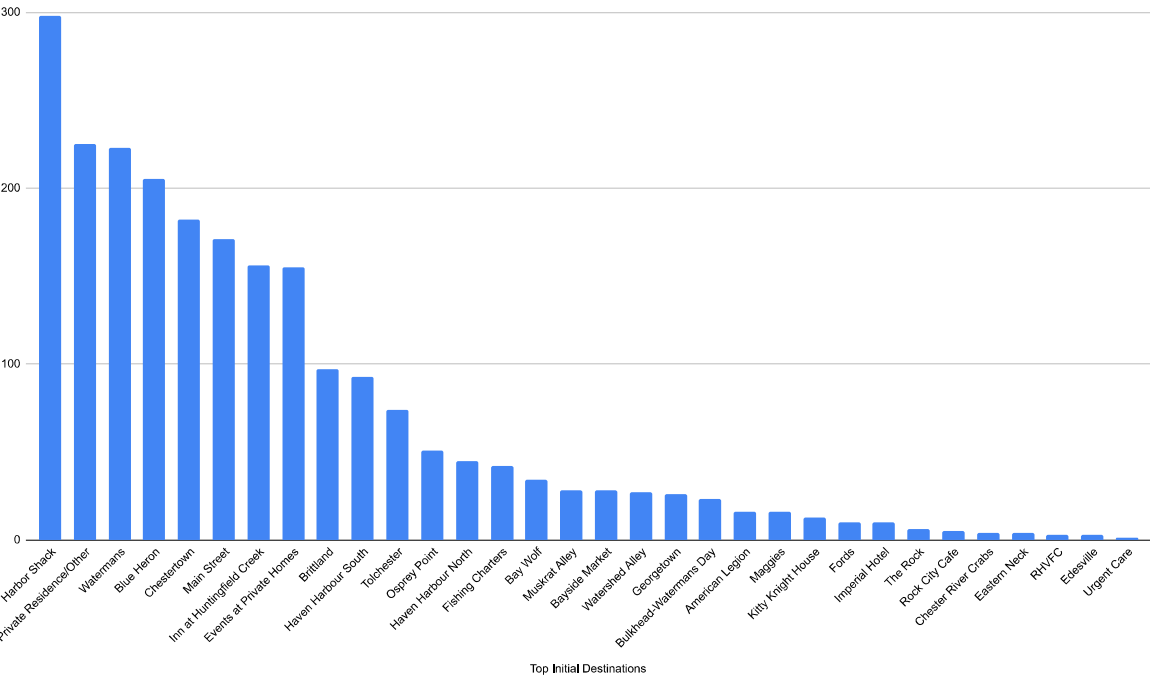
Revenue			Expense	
Kent County	\$16,050.00		Drivers	\$26,775.00
Chestertown	\$5,000.00		Fuel	\$4,433.00
Rock Hall	\$5,000.00		Insurance	\$6,721.00
USRC	\$10,000.00		Maintenance	\$8,927.42
GRHBA	\$1,500.00		Amortization	\$6,972.60
AD Sales	\$8,950.00		Vehicle Rental	\$1,646.53
Ticket Sales	\$25,345.00		Mobile App	\$2,500.00
			Advertising	\$3,388.00
Total Revenue	\$71,845.00			\$61,363.55
	Net Income	\$10,481.45		

	Rock Hall Shuttle Rider Statistics - 2022						Rock Hall Shuttle Rider Statistics - 2023						Passengers	Rides
	2513	2388	47	78	5361		2274	1608	75	339	252	4559	90.49%	85.04%
Week Of	Total	Rock Hall	Tolchester	Chestertown	Rides		Total	Rock Hall	Tolchester	Chestertown	Other	Rides		
May 27	52	52			104	May 26	196	90	8	63	35	338	376.92%	325.00%
June 3	38	36	2		76	June 2	84	55		29		176	221.05%	231.58%
June 10	55	44	6	5	105	June 9	296	273	9		14	552	538.18%	525.71%
June 17	63	57	4	2	136	June 16	75	61			14	151	119.05%	111.03%
June 24	133	131	1	1	263	June 23	63	62			1	126	47.37%	47.91%
July 1	265	246	10	9	622	June 30	152	135	11	1	5	312	57.36%	50.16%
July 8	139	120	1	18	290	July 7	29	24	1	0	4	62	20.86%	21.38%
July 15	101	95	6	0	245	July 14	44	34	2	5	3	85	43.56%	34.69%
July 22	166	161	0	5	327	July 21	80	56	0	1	23	152	48.19%	46.48%
July 29	197	190	7	0	491	July 28	124	112	0	2	10	264	62.94%	53.77%
August 5	203	185	0	18	379	August 4	64	57	0	0	7	136	31.53%	35.88%
August 12	146	143	2	1	357	August 11	170	152	10	4	4	360	116.44%	100.84%
August 19	68	64	0	4	133	August 18	98	81	0	0	17	228	144.12%	171.43%
August 26	104	104	0	0	207	August 25	68	53	8	2	5	151	65.38%	72.95%
September 2	289	279	6	4	605	September 1	121	85	26	0	10	296	41.87%	48.93%
September 9	77	72	0	5	149	September 8	140	12	0	121	7	276	181.82%	185.23%
September 16	127	126	0	1	234	September 15	22	18	0	0	4	47	17.32%	20.09%
September 23	33	33	0	0	69	September 22	107	26	0	62	19	184	324.24%	266.67%
September 30	76	75		1	150	September 29	170	150	0	20	0	304	223.68%	202.67%
October 7	181	175	2	4	419	October 6	63	41	0	1	21	129	34.81%	30.79%
October 14						October 13	108	31	0	28	49	230	N/A	N/A
Total	2513	2388	47	78	5361	Total	2274	1608	75	339	252	4559	90.49%	85.04%
%		95.03%	1.87%	3.10%		%		70.71%	3.30%	14.91%	11.08%			
Groups	590	23.48%					1036	45.56%					175.59%	
Routine	1923	76.52%					1238	54.44%					64.38%	

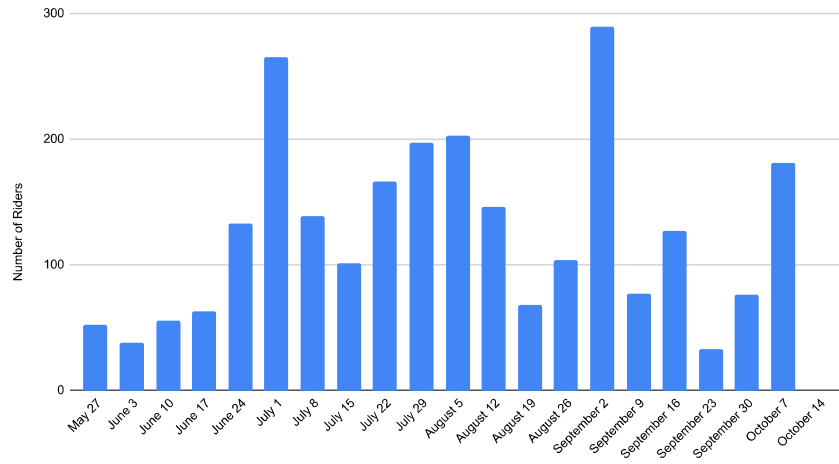
Pick Up Locations - 2023



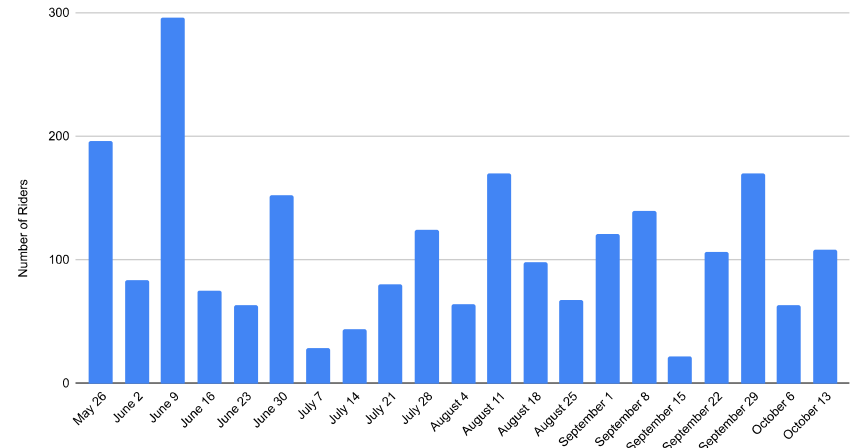
Initial Drop Off Locations - 2023



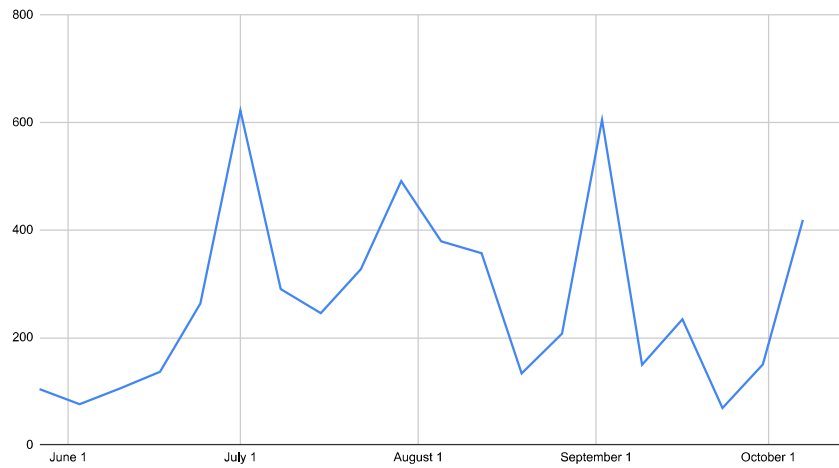
Rock Hall Shuttle Weekly Rider Statistics - 2022



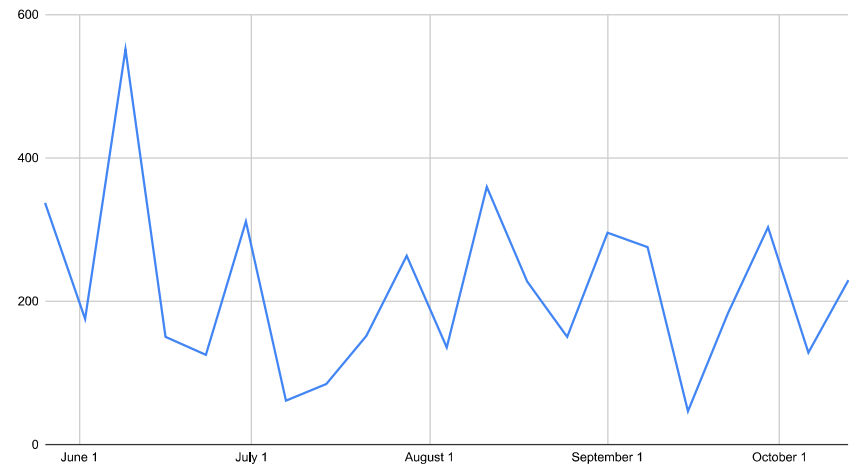
Rock Hall Shuttle Weekly Rider Statistics - 2023

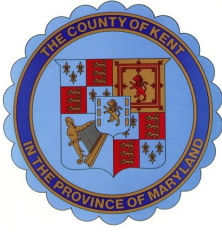


Trips Per Week 2022



Trips Per Week 2023





**Shalyn Boulden, Tourism Manager, Economic and Tourism
Development
12/19/2023
County Commissioners Meeting**

Item Summary:

2022 Economic Impact of Tourism in Maryland

ATTACHMENTS:

Description

Kent County Tourism Impact

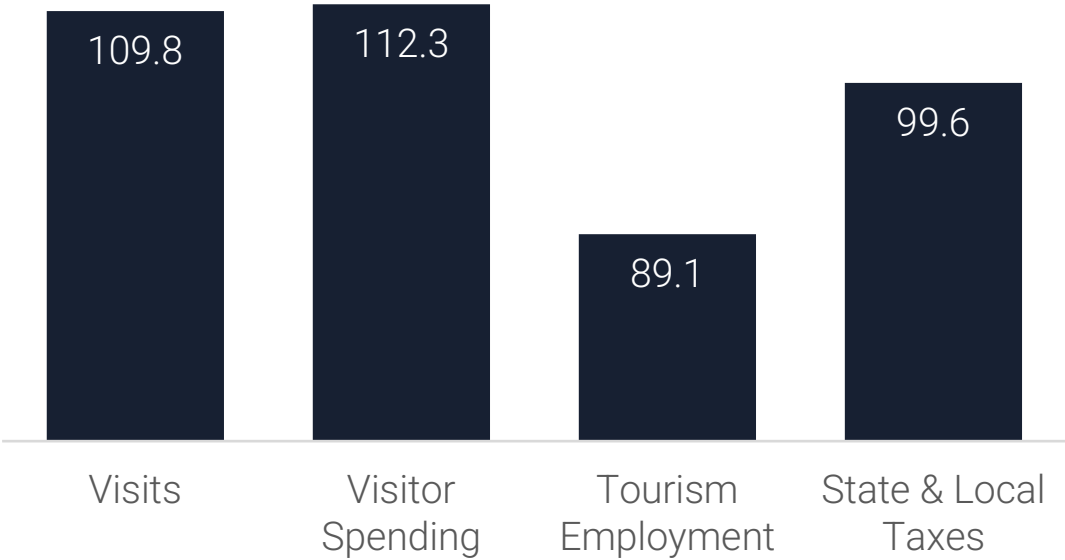
Maryland Tourism Economic Impact Report - 2022



KENT COUNTY HIGHLIGHTS

Several key indicators in Kent County are near or have surpassed pre-pandemic (2019) levels in 2022.

Kent County key indicators
Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Kent County has grown to 109% of 2019 levels.

Kent County visitor volume

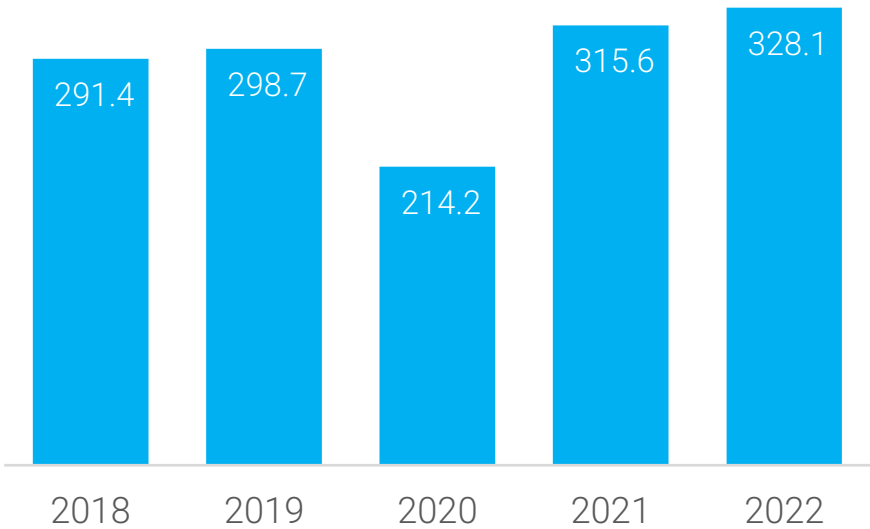
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	193.5	201.9	136.1	206.4	225.3
Overnight	97.9	96.8	78.1	109.1	102.8
Total Visitors	291.4	298.7	214.2	315.6	328.1
Growth rate		2.5%	-28.3%	47.4%	4.0%

Source: D. K. Shifflet, Tourism Economics

Kent County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



KENT COUNTY VISITOR SPENDING

Visitor spending grew 5% in Kent County in 2022, growth of over \$21 million.

Kent County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$63.2	\$63.9	\$46.9	\$68.4	\$71.8	5.0%	112.3%
Lodging*	\$31.1	\$32.4	\$22.8	\$29.5	\$32.7	10.7%	100.9%
Food & beverage	\$10.5	\$10.8	\$8.4	\$13.3	\$12.9	-2.7%	119.6%
Retail	\$5.1	\$4.8	\$4.2	\$6.2	\$6.5	3.3%	134.5%
Recreation	\$9.0	\$8.6	\$6.1	\$9.4	\$9.3	-1.0%	108.1%
Transportation**	\$7.5	\$7.3	\$5.4	\$10.0	\$10.4	4.8%	142.1%

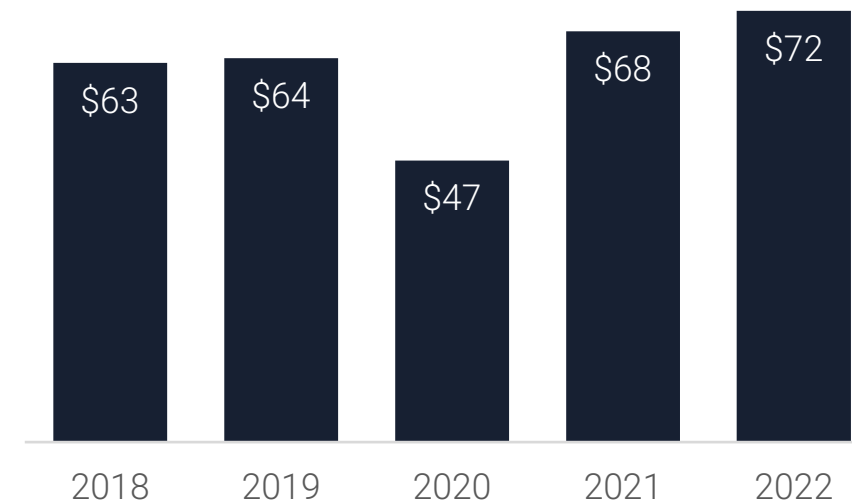
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Kent County visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

KENT COUNTY ECONOMIC IMPACTS

Nearly 640 visitor-supported jobs represent 8.4% of all jobs in Kent County.

Visitor impacts in Kent County

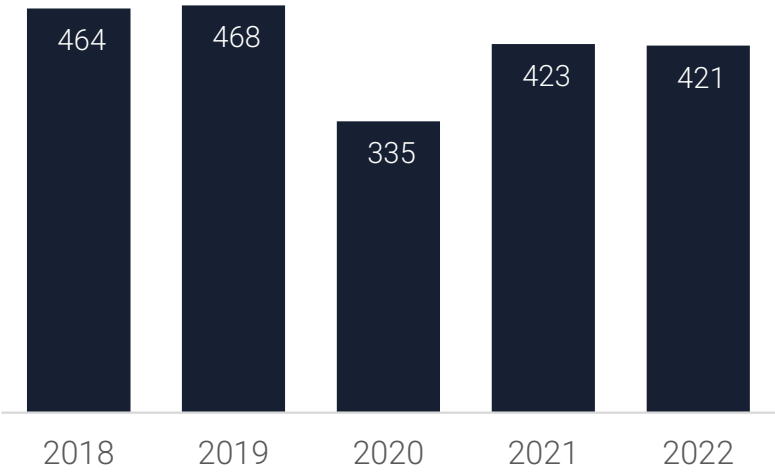
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	464	468	335	423	421	-0.4%	90.1%
Total	707	712	534	639	635	-0.6%	89.1%
Share of State	0.31%	0.31%	0.32%	0.37%	0.34%		
Labor Income							
Direct	\$14.4	\$14.6	\$12.3	\$16.4	\$16.5	0.6%	112.9%
Total	\$27.2	\$27.8	\$24.1	\$29.7	\$29.6	-0.1%	106.7%
Share of State	0.26%	0.26%	0.30%	0.34%	0.31%		
Tax revenues							
Federal	\$6.1	\$6.2	\$4.8	\$6.1	\$6.2	2.3%	101.2%
State & Local	\$8.7	\$8.8	\$7.0	\$8.7	\$8.8	1.0%	99.6%
Hotel	\$0.3	\$0.3	\$0.2	\$0.4	\$0.4	-4.3%	122.4%
Total	\$15.1	\$15.3	\$11.9	\$15.2	\$15.4	1.4%	100.7%

Source: Tourism Economics

Kent County direct employment timeline

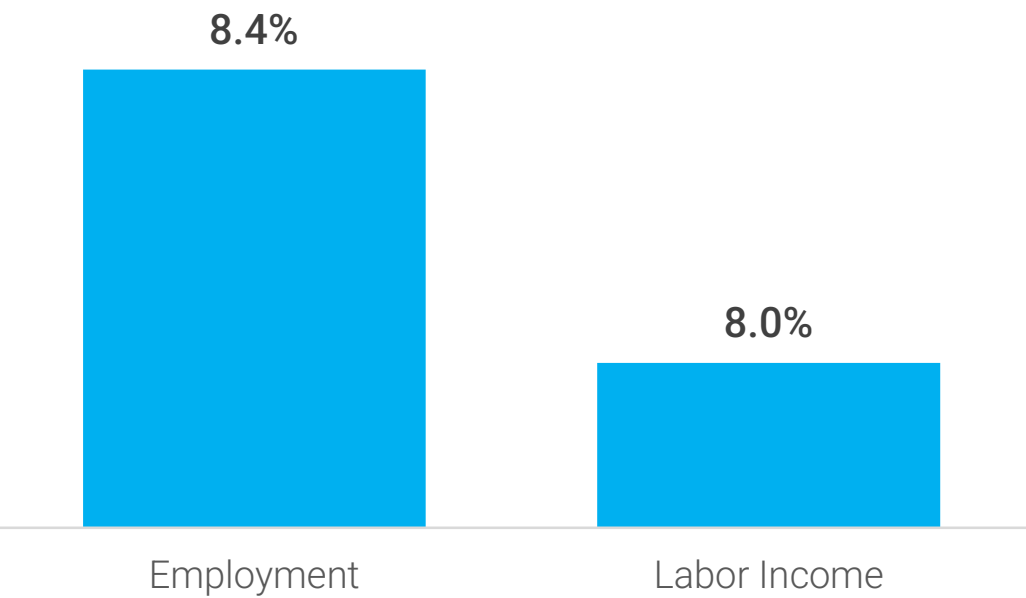
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

ECONOMIC IMPACT OF TOURISM IN MARYLAND - 2022

October 2023

Prepared for: Maryland Office of Tourism



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INTRODUCTION

PROJECT BACKGROUND

The travel sector is an integral part of the Maryland economy. Visitors generate significant economic benefits to households, businesses, and government alike and represent a critical driver of the state's future. In 2022, visitor-supported employment reached 187,296 jobs in the state, including indirect and induced impacts.

By monitoring the visitor economy, policymakers can inform decisions regarding the funding and prioritization of the sector's development. They can also carefully monitor its successes and future needs. This is particularly true for Maryland as it builds upon its visitor economy.

METHODOLOGY AND DATA SOURCES

An IMPLAN input-output model was constructed for Maryland. The model traces the flow of visitor-related expenditures through the local economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of tourism. Tourism Economics then cross-checked these findings with employment and wage data for each sector to ensure the findings are within reasonable ranges. Adjustments to model outputs were made to ensure results captured only benefits in the state of Maryland.

Visitors included those who stayed overnight or traveled more than 50 miles to the destination.

The primary source of the employment and wage data is the Regional Economic Information System (REIS), maintained by the Bureau of Economic Analysis.

By establishing a timeline of economic impacts, the industry can track its progress.

To quantify the economic significance of the visitor economy in Maryland, Tourism Economics has prepared a comprehensive model detailing the far-reaching impacts arising from visitor spending. The results of this study show the scope of the travel sector in terms of direct visitor spending, as well as the total economic impacts, jobs, and fiscal (tax) impacts in the broader economy.

This is more comprehensive than Bureau of Labor Statistics (ES202/QCEW) data because sole-proprietors do not require unemployment insurance and are not counted in the ES202 data.

The analysis draws on the following data sources:

- D.K. Shifflet: survey data, including spending and visitor totals for domestic visitors to Maryland
- Maryland Office of Tourism: Maryland sales and lodging tax receipts
- STR: lodging performance data, including room demand, room rates, occupancy, and room revenue, for hotels
- Bureau of Economic Analysis and Bureau of Labor Statistics: employment and wage data, by industry.
- Tourism Economics: international travel data for overseas, Canadian, and Mexican travel to Maryland based on aviation, survey, and credit card information.

ECONOMIC IMPACTS

KEY FINDINGS

VISITOR SPENDING

Spending by visitors surpassed pre-pandemic levels by 4% in 2022. With growth of more than \$3 billion, visitor spending reached \$19.4 billion.

VISITOR VOLUMES

Visitors to Maryland topped 43.5 million in 2022, growing to 103% of pre-pandemic levels. The number of visitors to Maryland grew by more than eight million trips in 2022, an increase of 23.7%.



43.5 MILLION

Total Visitors to Maryland in 2022

TOTAL ECONOMIC IMPACT

Visitor spending of \$19.4 billion generated a total of \$30.3 billion in total business sales. This total economic impact included more than 187,200 jobs, and \$2.3 billion in state and local tax revenues.



\$30.3 BILLION

Total Economic Impact of Tourism in Maryland in 2022

TOTAL ECONOMIC IMPACT

MARYLAND TOURISM (2022)



\$19.4B

Visitor
Spending



\$30.3B

Total
Economic
Impact



187,296

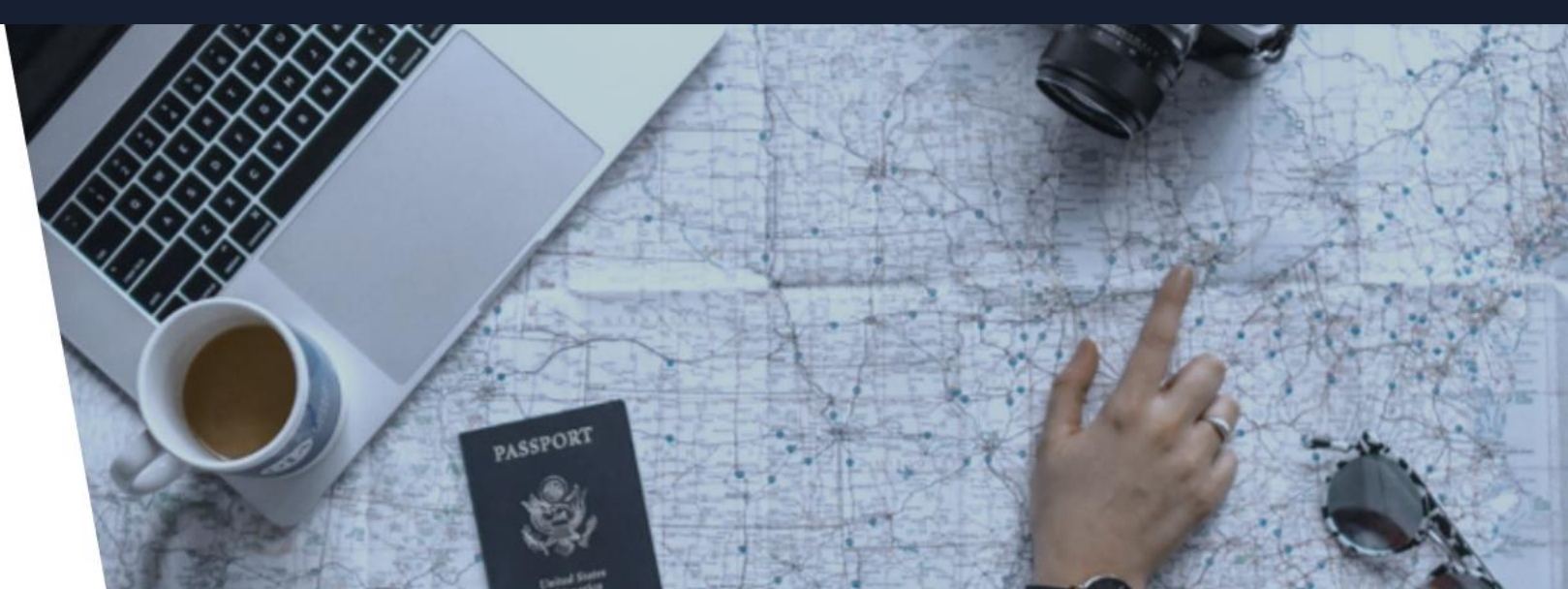
Total
Jobs
Generated



\$2.3B

State & Local
Taxes
Generated





VISITS & VISITOR SPENDING

Visitor spending surged past pre-pandemic levels as the rebound from the pandemic continued in 2022. Visitors to Maryland spent \$19.4 billion in 2022, an increase of 18.4% that pushed spending to 104.4% of 2019 levels.

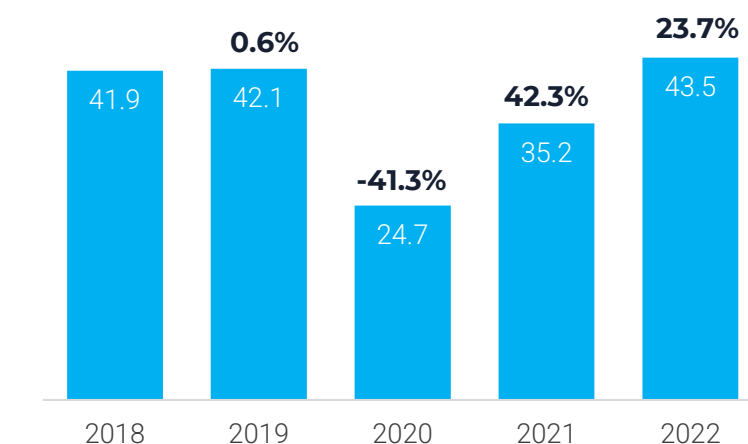
VISITOR VOLUME

Growth in 2022

With an increase of 23.7%, visitor volumes continued to rebound from pandemic-related declines and surpassed 2019 levels in 2022.

Visitor volume increased to 43.5 million visitors in 2022, the majority of which were day visitors.

Maryland visitor volume
Amounts in millions of visitors



Source: D.K. Shifflet, Tourism Economics

VISITOR SPENDING

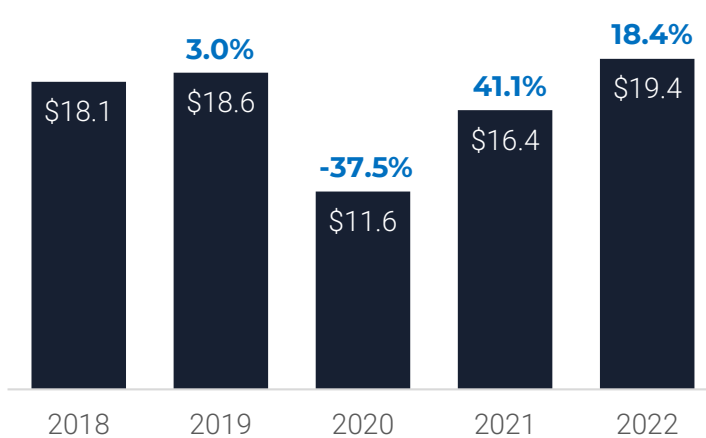
Visitors to Maryland spent \$19.4 billion across a wide range of sectors in 2022.

Of the \$19.4 billion spent in Maryland in 2022 by visitors, the most was spent on transportation: both local spending within the destination, including purchases of gasoline and dollars spent on parking, as well as air transportation. Transportation spending registered \$6.0 billion, 31% of visitor spending.

Visitors to Maryland spent the next highest amount on food and beverage: \$4.7 billion, or 24% of all visitor spending.

Spending on lodging, including the value of second homes, resulted in \$3.8 billion, 20% of visitor spending.

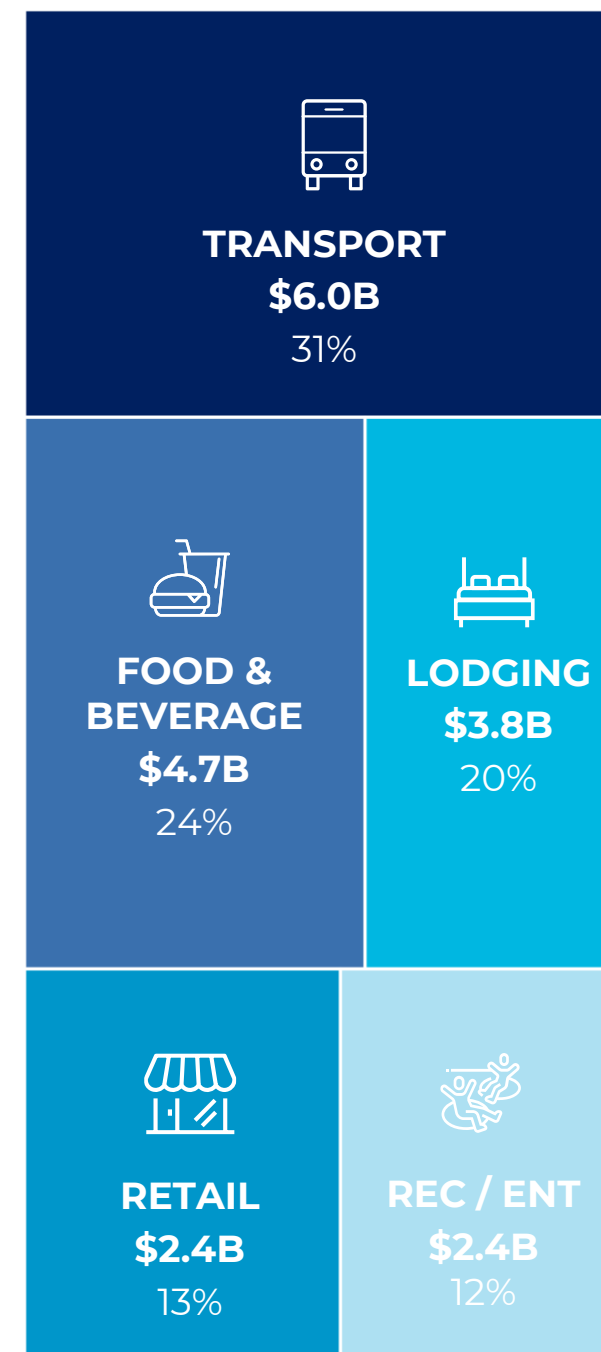
Maryland visitor spending
Amounts in \$ billions



Source: D.K. Shifflet, Tourism Economics

\$19.4 BILLION

Total Visitor Spending in 2022



Source: Tourism Economics

Note: Lodging spending is calculated as an industry. Spending also includes spending on second homes. Transport includes both air and local transportation.

VISITOR VOLUME & SPENDING TRENDS

Visitor spending rose 18.4% in 2022 after significant growth in 2021. Spending grew across all sectors, driven by pent-up demand and increases in prices.

Among all spending categories, growth in lodging, including short-term rentals and second homes, was especially notable in 2022. Capitalizing on a 14.4% increase in average room rates, spending on lodging increased 22.9%, reaching 109.1% of 2019 levels.

Spending on all categories exceeded pre-pandemic levels for the first time in 2022.

Maryland visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$18,050	\$18,590	\$11,619	\$16,391	\$19,402	18.4%	104.4%
Lodging*	\$3,432	\$3,550	\$2,230	\$3,152	\$3,873	22.9%	109.1%
Food & beverage	\$4,141	\$4,343	\$2,987	\$4,000	\$4,704	17.6%	108.3%
Retail	\$2,394	\$2,413	\$1,711	\$2,184	\$2,431	11.3%	100.7%
Transportation**	\$5,678	\$5,906	\$3,298	\$5,043	\$6,001	19.0%	101.6%
Recreation	\$2,404	\$2,378	\$1,393	\$2,012	\$2,393	18.9%	100.6%

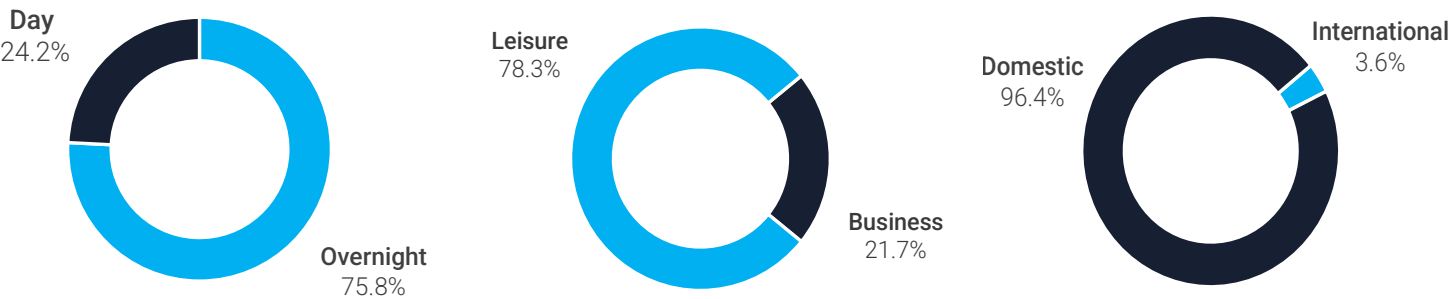
Source: Tourism Economics

*Lodging includes second home spending

** Transportation includes both ground and air transportation

Maryland visitor spending share by segment

Percent of visitor spending by segment



Source: D.K. Shifflet, Tourism Economics

Maryland business and leisure visitor volume and spending

Amounts in millions of visitors, \$ millions, and \$ per visitor

	2018	2019	2020	2021	2022
Total visitors	41.5	42.1	24.7	35.2	43.5
Leisure	35.1	35.6	21.3	30.2	35.8
Business	6.4	6.5	3.4	4.9	7.7
Total visitor spending	\$18,050	\$18,590	\$11,619	\$16,391	\$19,402
Leisure	\$13,312	\$13,890	\$9,119	\$12,907	\$15,199
Business	\$4,738	\$4,700	\$2,501	\$3,484	\$4,202
Per visitor spending	\$435	\$442	\$470	\$466	\$446
Leisure	\$379	\$390	\$428	\$427	\$424
Business	\$740	\$723	\$736	\$705	\$546

Source: D.K. Shifflet, Tourism Economics

Maryland day and overnight visitor volume and spending

Amounts in millions of visitors, \$ millions, and \$ per visitor

	2018	2019	2020	2021	2022
Total visitors	41.9	42.1	24.7	35.2	43.5
Day	21.6	22.3	13.2	19.8	25.9
Overnight	20.3	19.8	11.5	15.3	17.6
Total visitor spending	\$18,050	\$18,590	\$11,619	\$16,391	\$19,402
Day	\$3,008	\$3,071	\$1,758	\$3,667	\$4,695
Overnight	\$15,042	\$15,519	\$9,861	\$12,725	\$14,707
Per visitor spending	\$431	\$441	\$470	\$466	\$446
Day	\$139	\$138	\$133	\$185	\$181
Overnight	\$741	\$784	\$855	\$830	\$836

Source: D.K. Shifflet, Tourism Economics

VISITOR ECONOMY TRENDS

The visitor economy looks at a broader range of tourism-related expenditures. These include government support for tourism as well as capital investment (both new structures and machinery and equipment spending).

Overall, traveler demand reached \$20.8 billion in 2022. Of all categories, domestic traveler spending dominated, bringing in \$18.7 billion. Capital investment in support of tourism grew to \$1 billion in 2022, an increase of 14%.

Capital investment in tourism-related construction and machinery & equipment represented 5.3% of all tourism-related demand, while international visitor markets increased their share to 3.4%. International demand expedited its recovery in 2022, although it still remains well short of its pre-pandemic share of 8%.

Tourism capital investment

Amounts in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total tourism CAPEX	\$1,213	\$1,199	\$846	\$957	\$1,093	14.2%	91.1%
Machinery and equip.	\$767	\$795	\$472	\$692	\$795	14.9%	100.1%
Construction	\$446	\$405	\$374	\$264	\$298	12.6%	73.6%

Source: Tourism Economics,

Maryland tourism demand

Amounts in \$ millions

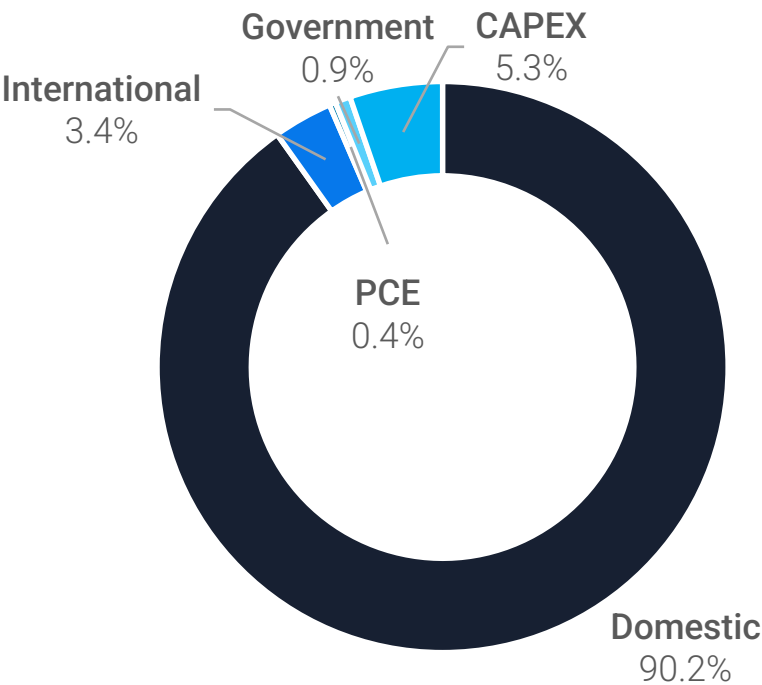
	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Tourism demand	\$19,516	\$20,058	\$12,605	\$17,543	\$20,750	18.3%	103.4%
Domestic visitor	\$16,469	\$17,033	\$11,412	\$16,082	\$18,706	16.3%	109.8%
International visitor	\$1,581	\$1,557	\$208	\$310	\$696	124.7%	44.7%
Non-visitor PCE	\$92	\$100	\$56	\$66	\$75	13.9%	74.7%
Governmental support	\$161	\$169	\$83	\$129	\$180	40.0%	106.6%
Capital investment	\$1,213	\$1,199	\$846	\$957	\$1,093	14.2%	91.1%

Source: Tourism Economics, D.K. Shifflet

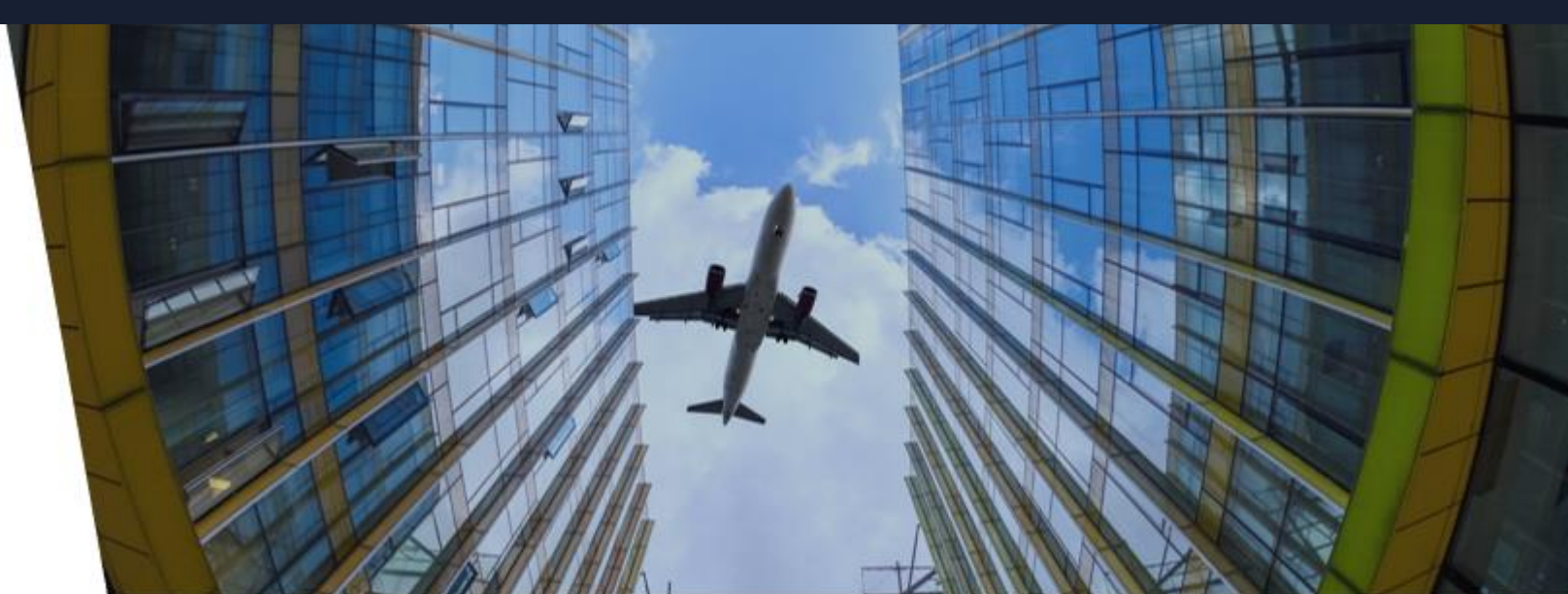


Maryland tourism demand share, by segment

Percent of tourism demand by segment



Source: Tourism Economics, D.K. Shifflet



ECONOMIC IMPACT METHODOLOGY

The analysis of the Maryland visitor economy begins with direct visitor spending and analyzes the downstream effects of this spending on the broader economy. To determine total economic impact, we input direct spending into a model of the Maryland economy, constructed using an IMPLAN input-output (I-O) model. The model traces the full extent of industry impacts as dollars flow through the local economy.

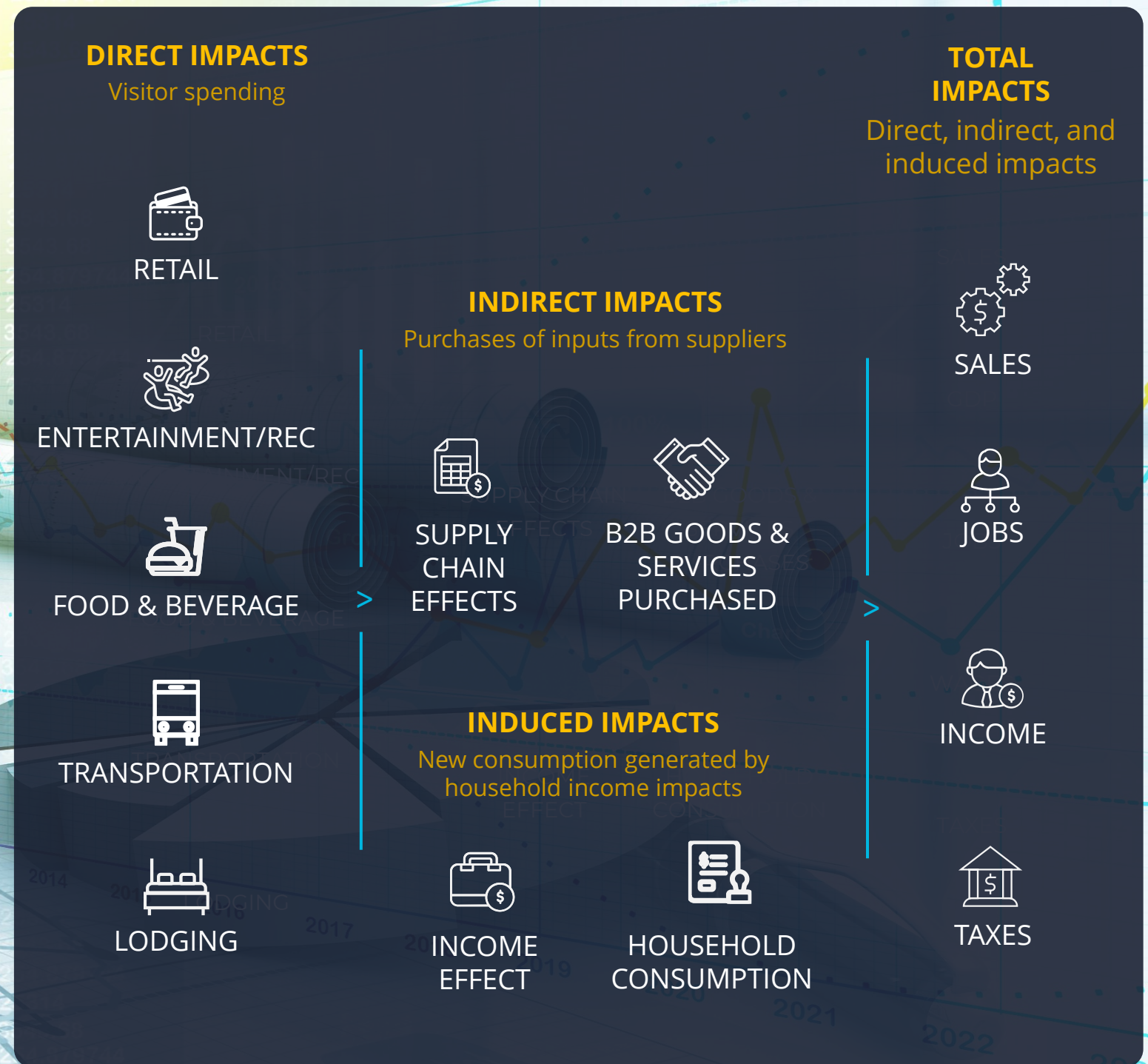
An I-O model represents a profile of an economy by measuring the relationships among industries and consumers and quantifies three levels of impact:

- 1. Direct impacts:** Visitor spending creates direct economic value within a discrete group of sectors (such as recreation and transportation). This supports a relative proportion of spending, jobs, wages, and taxes within each sector.
- 2. Indirect impacts:** Each directly affected sector also purchases goods and services as inputs (e.g. food wholesalers, utilities) into production. These impacts are called indirect impacts or supply-chain effects.
- 3. Induced impacts:** Lastly, the induced impact is generated when employees whose wages are generated either directly or indirectly by visitor spending spend those wages in the local economy. This is called the induced impact or income effect.

The Tourism Economics model calculates these three levels of impact - direct, indirect and induced - for a broad set of indicators, including:

- Spending
- Wages
- Employment
- Federal Taxes
- State Taxes
- Local Taxes

ECONOMIC IMPACT FRAMEWORK



VISITOR INDUSTRY IMPACTS

VISITOR-SUPPORTED EMPLOYMENT

Direct visitor-supported employment grew 9.5% in 2022 to reach 123,617 jobs. Despite an increase of 10,738 jobs, employment still trails 2019 levels.

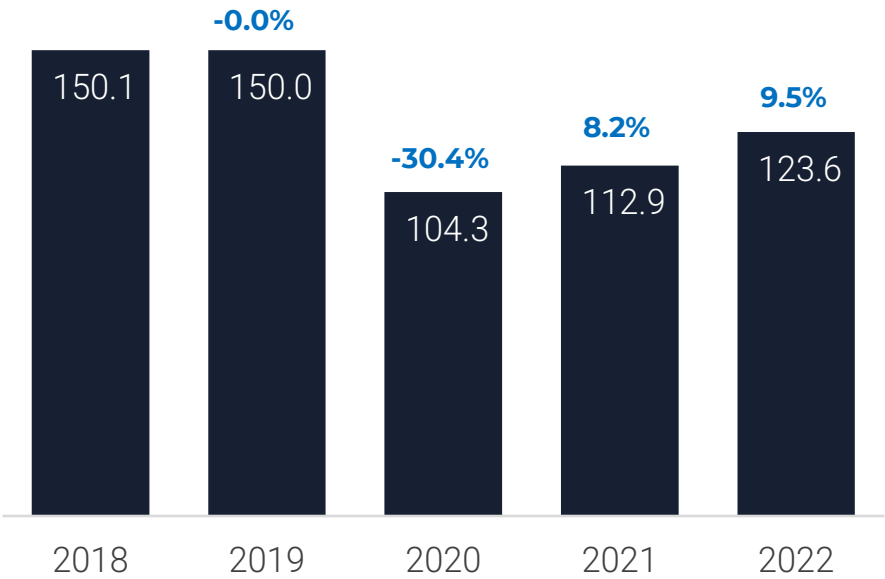
Overall, direct visitor-supported employment reached 82.7% of pre-pandemic levels. Employment growth is lagging the spending recovery as businesses initially proceeded cautiously and face ongoing labor shortages.

The evaluation of the direct impact of visitor activity allows for comparison against other industries in Maryland. In 2022, the tourism industry in Maryland ranked as the 10th largest employer in the state, surpassing manufacturing by 4,693 jobs. Recovery in Maryland's visitor economy remained among the strongest of any industry post-pandemic.



Visitor-supported employment

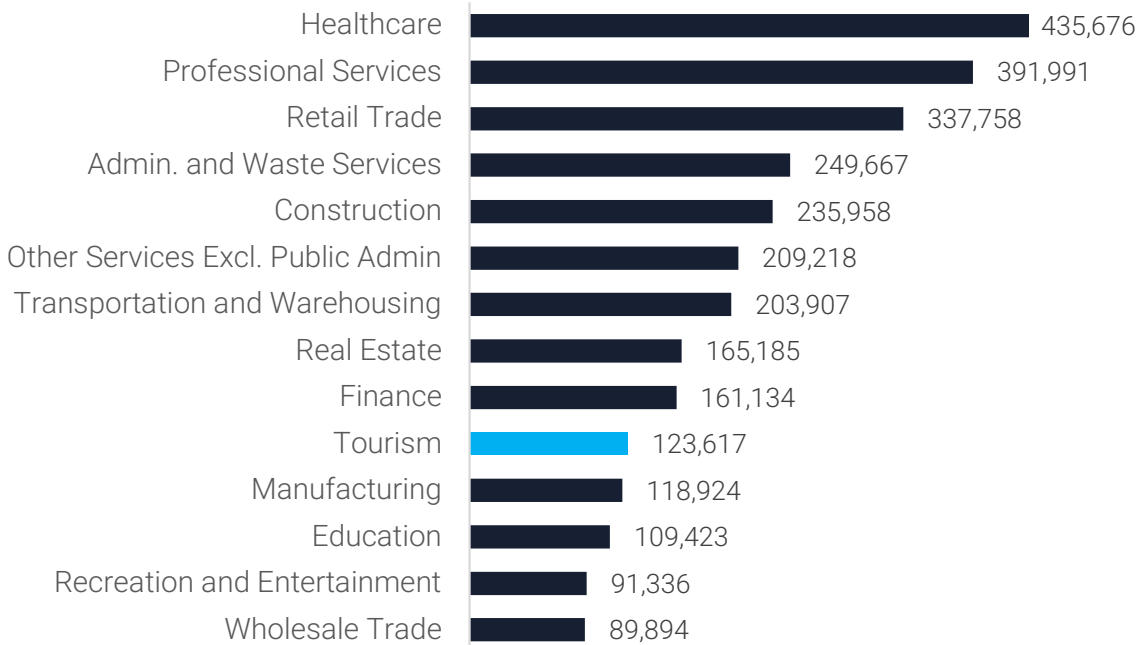
Amounts in thousands of jobs



Source: Tourism Economics

Employment in Maryland, by major industry

Amounts in number of jobs



Source: Tourism Economics



ECONOMIC IMPACT FINDINGS

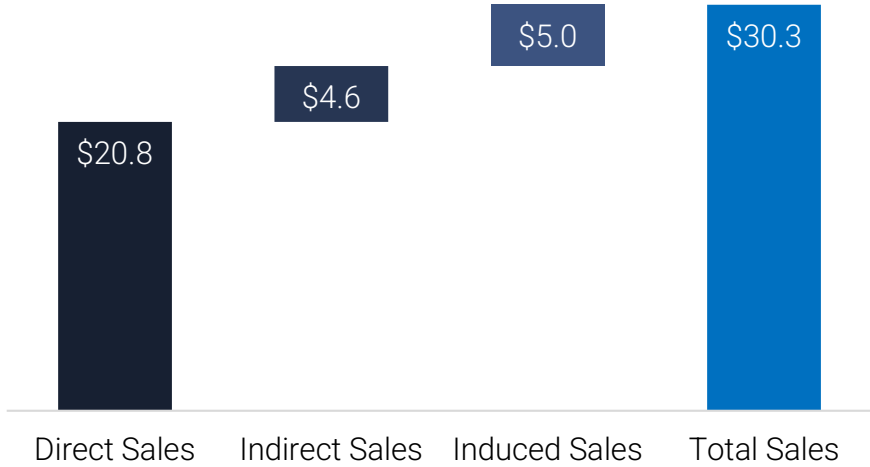
BUSINESS SALES IMPACTS

Visitors contributed a direct impact of \$20.8 billion in 2022. This direct impact led to \$9.6 billion in indirect and induced impacts. In total, visitors to Maryland generated over \$30.3 billion in business sales.

Aside from direct impacts, significant benefits accrue in sectors like finance, insurance, and real estate, and business services.

Summary economic impacts (2022)

Amounts in \$ billions



Source: Tourism Economics

Business sales impacts by industry (2022)

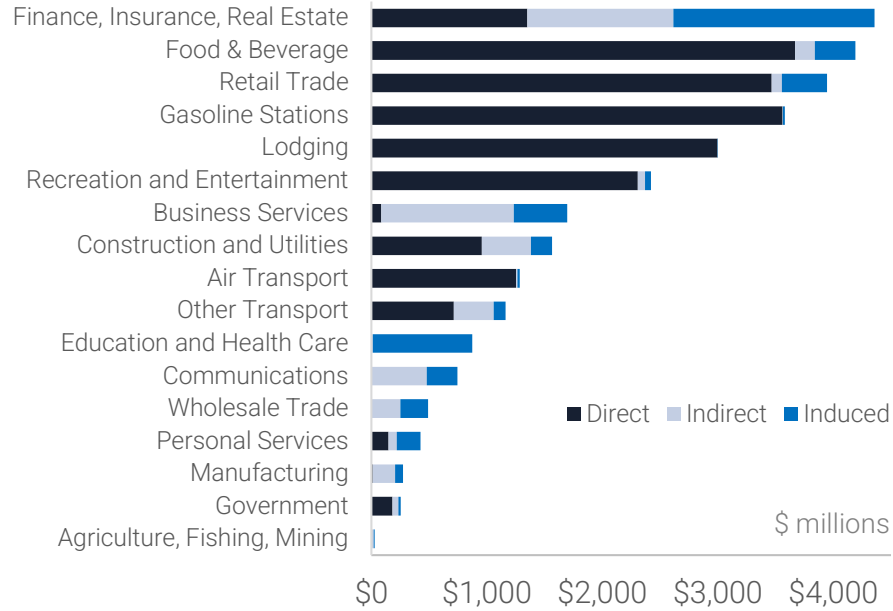
Amounts in \$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$20,749.6	\$4,598.4	\$5,001.7	\$30,349.8
Finance, Insurance, Real Estate	\$1,350.9	\$1,264.3	\$1,743.2	\$4,358.4
Food & Beverage	\$3,669.3	\$172.5	\$351.5	\$4,193.3
Retail Trade	\$3,465.6	\$89.3	\$393.2	\$3,948.1
Gasoline Stations	\$3,560.7	\$2.5	\$16.5	\$3,579.8
Lodging	\$2,997.1	\$1.0	\$2.0	\$3,000.1
Recreation and Entertainment	\$2,223.7	\$61.4	\$53.0	\$2,338.1
Construction and Utilities	\$1,093.0	\$424.6	\$182.2	\$1,699.8
Business Services	\$85.2	\$1,146.7	\$465.3	\$1,697.2
Air Transport	\$1,253.0	\$12.5	\$18.2	\$1,283.7
Other Transport	\$712.1	\$346.1	\$103.8	\$1,162.0
Education and Health Care		\$9.2	\$865.0	\$874.2
Communications		\$478.7	\$266.6	\$745.3
Wholesale Trade		\$250.2	\$239.1	\$489.4
Personal Services	\$147.1	\$72.2	\$205.7	\$425.0
Manufacturing	\$11.6	\$193.7	\$68.4	\$273.7
Government	\$180.3	\$54.0	\$19.0	\$253.4
Agriculture, Fishing, Mining		\$19.5	\$8.7	\$28.2

Source: Tourism Economics

Tourism business sales impacts by industry (2022)

Amounts in \$ millions



Source: Tourism Economics

VALUE ADDED IMPACTS

The value of all visitor-associated goods and services produced in Maryland was \$16.2 billion in 2022.

Summary Value-added Impacts (2022)

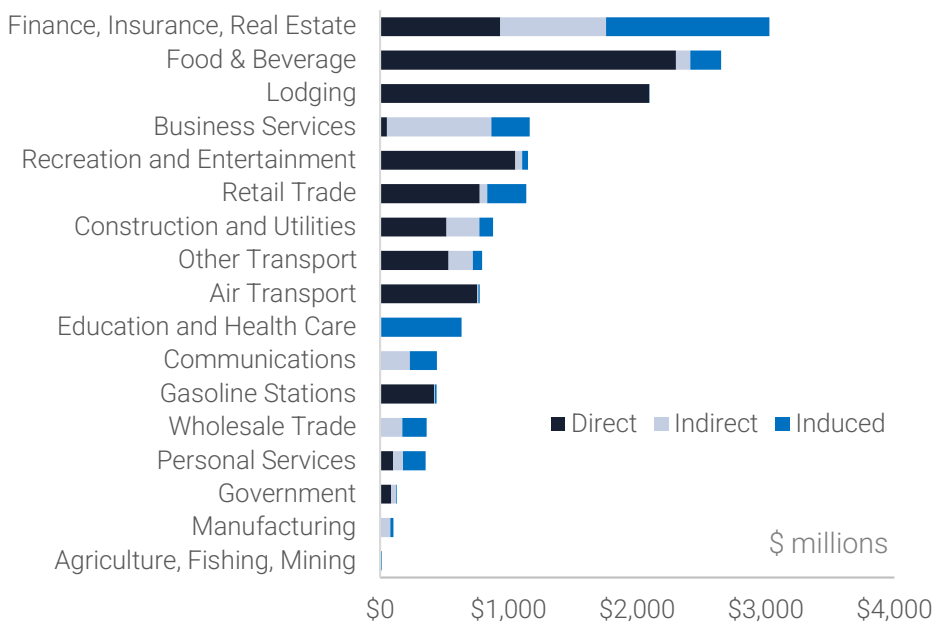
Amounts in \$ billions



Source: Tourism Economics

Tourism Value-added Impacts by Industry (2022)

Amounts in \$ millions



Source: Tourism Economics

In Maryland, the finance, insurance, and real estate industry had the largest economic contribution when accounting for indirect and induced impacts, followed closely by food and beverage and lodging.



Summary Value-added Impacts by Industry (2022)

Amounts in \$ millions

	Direct GDP	Indirect GDP	Induced GDP	Total GDP
Total, all industries	\$9,627.1	\$2,933.8	\$3,592.6	\$16,153.5
Finance, Insurance, Real Estate	\$934.8	\$824.3	\$1,268.2	\$3,027.3
Food & Beverage	\$2,302.2	\$111.9	\$240.1	\$2,654.3
Lodging	\$2,094.1	\$0.7	\$1.4	\$2,096.2
Business Services	\$54.3	\$812.0	\$298.3	\$1,164.6
Recreation and Entertainment	\$1,052.7	\$53.0	\$43.6	\$1,149.3
Retail Trade	\$774.7	\$59.2	\$304.4	\$1,138.3
Construction and Utilities	\$517.1	\$256.3	\$105.5	\$878.9
Other Transport	\$532.8	\$189.2	\$71.6	\$793.6
Air Transport	\$755.0	\$8.2	\$11.0	\$774.3
Education and Health Care		\$8.6	\$625.0	\$633.6
Communications		\$232.7	\$209.7	\$442.4
Gasoline Stations	\$421.8	\$2.9	\$13.6	\$438.3
Wholesale Trade		\$172.6	\$189.3	\$361.9
Personal Services	\$100.4	\$76.7	\$177.8	\$354.9
Government	\$83.6	\$41.9	\$3.4	\$129.0
Manufacturing	\$3.6	\$75.0	\$26.1	\$104.6
Agriculture, Fishing, Mining		\$8.5	\$3.7	\$12.3

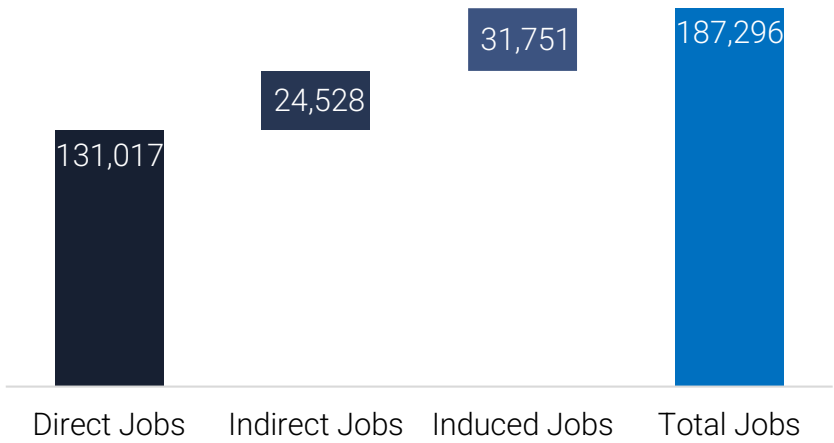
Source: Tourism Economics

JOB IMPACTS

Visitor activity sustained 131,017 direct jobs in 2022, with an additional 56,279 jobs supported from the indirect and induced impacts of visitor activity. The total jobs impact recovered to 187,296 in 2022, approximately one of every 20 jobs in Maryland.

Summary employment impacts (2022)

Amounts in number of jobs

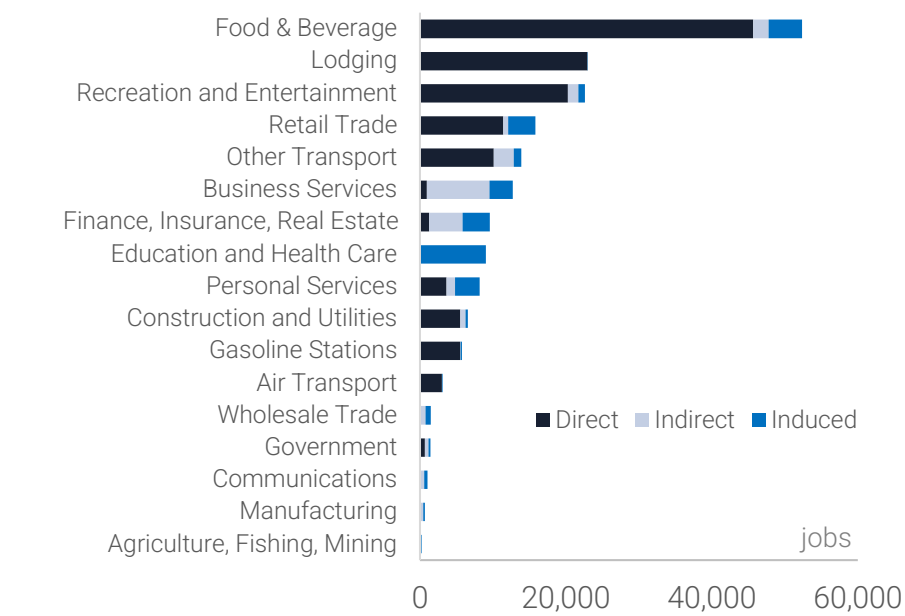


Source: Tourism Economics

Visitor spending supported the largest number of jobs in the food and beverage industry (52,373) followed by lodging with 22,972 jobs and recreation with 22,606 jobs.

Tourism job impacts by industry (2022)

Amounts in number of jobs



Source: Tourism Economics



Summary job impacts by industry (2022)

Amounts in number of jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	131,017	24,528	31,751	187,296
Food & Beverage	45,669	2,100	4,603	52,373
Lodging	22,946	7	19	22,972
Recreation and Entertainment	20,291	1,407	908	22,606
Retail Trade	11,410	664	3,724	15,798
Other Transport	10,109	2,759	1,005	13,874
Business Services	960	8,548	3,213	12,721
Finance, Insurance, Real Estate	1,257	4,567	3,737	9,562
Education and Health Care		134	8,885	9,019
Personal Services	3,625	1,175	3,369	8,169
Construction and Utilities	5,512	726	326	6,564
Gasoline Stations	5,546	21	172	5,739
Air Transport	3,000	30	57	3,087
Wholesale Trade		752	740	1,492
Government	652	512	264	1,428
Communications		599	420	1,019
Manufacturing	39	391	226	655
Agriculture, Fishing, Mining		136	84	220

Source: Tourism Economics

LABOR INCOME IMPACTS

Visitor activity generated \$6.0 billion in direct labor income and a total of \$9.7 billion when including indirect and induced impacts.

Summary labor income impacts (2022)

Amounts in \$ billions

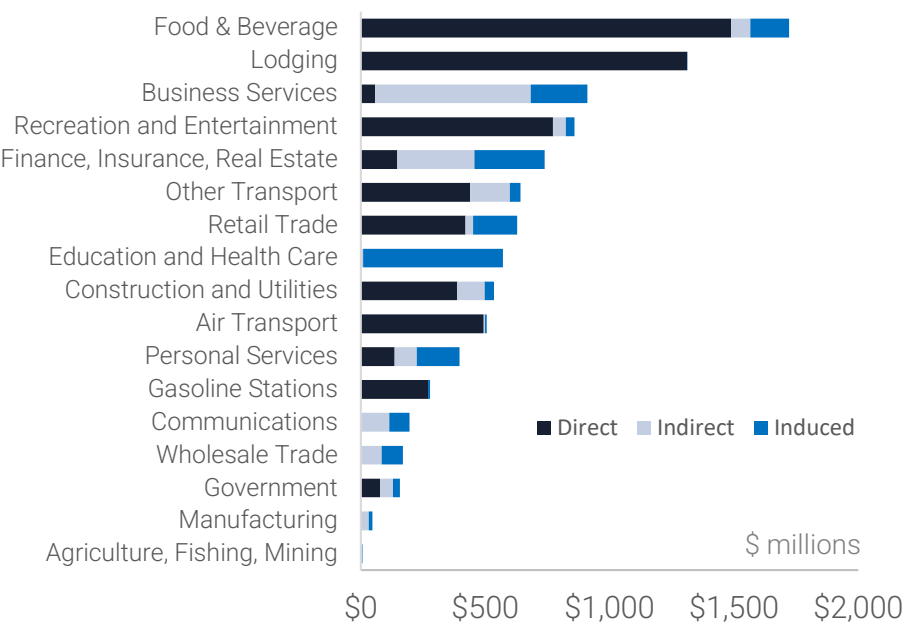


Source: Tourism Economics

Tourism labor income Impacts by Industry (2022)

Amounts in \$ millions

There are ten industries in which visitor activity supports \$500 million or more in personal income. These range from the obvious—food & beverage and lodging, to the less obvious—business services, education, and health care.



Source: Tourism Economics



Summary labor income impacts (2022)

Amounts in \$ millions

	Direct Labor Income	Indirect Labor Income	Induced Labor Income	Total Labor Income
Total, all industries	\$6,004.0	\$1,754.3	\$1,922.4	\$9,680.7
Food & Beverage	\$1,488.9	\$76.9	\$156.2	\$1,722.0
Lodging	\$1,311.5	\$0.5	\$1.0	\$1,313.0
Business Services	\$57.8	\$625.8	\$227.7	\$911.2
Recreation and Entertainment	\$772.3	\$52.7	\$34.0	\$858.9
Finance, Insurance, Real Estate	\$146.0	\$311.5	\$281.9	\$739.4
Other Transport	\$439.3	\$159.7	\$43.6	\$642.6
Retail Trade	\$420.3	\$30.9	\$177.4	\$628.7
Education and Health Care		\$9.0	\$562.3	\$571.3
Construction and Utilities	\$387.5	\$110.1	\$38.2	\$535.8
Air Transport	\$494.6	\$4.7	\$7.2	\$506.5
Personal Services	\$136.3	\$88.6	\$172.5	\$397.4
Gasoline Stations	\$269.8	\$1.2	\$7.0	\$277.9
Communications		\$114.1	\$82.1	\$196.2
Wholesale Trade		\$83.7	\$85.1	\$168.8
Government	\$77.6	\$52.1	\$27.3	\$157.0
Manufacturing	\$2.4	\$29.1	\$15.6	\$47.1
Agriculture, Fishing, Mining		\$3.8	\$3.2	\$7.0

Source: Tourism Economics

ECONOMIC IMPACT FINDINGS

FISCAL (TAX) IMPACTS

Visitor spending generated \$4.3 billion in government revenues in 2022.

State and local taxes alone tallied \$2.3 billion in 2022. The majority of state revenues are from sales taxes, with income, corporate, social insurance, and property taxes, and excise and fees adding an additional \$551 million to state revenues.

Local tax revenues generated by visitor spending surpassed \$1 billion in 2022. Property taxes occupied more than half of local tax revenues, with lodging, income, sales, corporate, social insurance, and excise and fees combining to add a further \$473 million.

Each household in Maryland would need to be taxed an additional \$999 to replace the visitor-generated taxes received by state and local governments in 2022.

Fiscal (tax) impacts

Amounts in \$ millions

	2018	2019	2020	2021	2022	2021 growth
Total Tax Revenues	\$4,672.7	\$4,819.7	\$3,239.3	\$3,789.9	\$4,254.1	12.2%
Federal Taxes	\$2,178.8	\$2,240.7	\$1,513.9	\$1,730.8	\$1,962.0	13.4%
Personal Income	\$705.9	\$726.8	\$519.1	\$584.0	\$646.1	10.6%
Corporate	\$152.3	\$157.0	\$114.0	\$130.9	\$150.2	14.8%
Indirect Business	\$204.1	\$207.3	\$117.1	\$134.1	\$152.7	13.9%
Social Insurance	\$1,116.5	\$1,149.5	\$763.7	\$881.9	\$1,013.0	14.9%
State and Local Taxes	\$2,494.0	\$2,579.0	\$1,725.4	\$2,059.1	\$2,292.1	11.3%
Sales	\$1,038.8	\$1,057.8	\$545.6	\$707.9	\$810.8	14.5%
Lodging	\$160.6	\$169.2	\$82.9	\$128.9	\$172.3	33.7%
Personal Income	\$276.1	\$284.3	\$215.6	\$268.6	\$294.8	9.8%
Corporate	\$233.6	\$236.7	\$152.2	\$161.2	\$174.0	7.9%
Social Insurance	\$24.6	\$24.7	\$15.5	\$16.0	\$17.5	9.3%
Excise and Fees	\$298.3	\$318.0	\$199.3	\$231.0	\$245.2	6.1%
Property	\$462.1	\$488.3	\$514.2	\$545.7	\$577.6	5.9%

Source: Tourism Economics



Fiscal (tax) impacts, by category

Amounts in \$ millions

	2018	2019	2020	2021	2022
State & Local Revenues	\$1,573.7	\$2,579.0	\$1,725.4	\$2,059.1	\$2,292.1
State Taxes	\$1,573.7	\$1,612.2	\$947.9	\$1,156.0	\$1,290.7
Sales	\$947.1	\$964.4	\$497.4	\$645.9	\$739.8
Personal Income	\$175.2	\$180.4	\$136.8	\$173.2	\$190.1
Corporate	\$228.6	\$231.7	\$149.0	\$157.7	\$170.3
Social Insurance	\$22.5	\$22.6	\$14.2	\$14.7	\$16.0
Excise and Fees	\$162.9	\$173.6	\$108.8	\$118.1	\$125.3
Property	\$37.4	\$39.5	\$41.6	\$46.5	\$49.2
Local Taxes	\$920.3	\$966.8	\$777.5	\$903.1	\$1,001.4
Sales	\$91.7	\$93.4	\$48.2	\$62.0	\$71.0
Lodging	\$160.6	\$169.2	\$82.9	\$128.9	\$172.3
Personal Income	\$100.9	\$103.9	\$78.8	\$95.4	\$104.8
Corporate	\$5.0	\$5.0	\$3.2	\$3.4	\$3.7
Social Insurance	\$2.0	\$2.0	\$1.3	\$1.3	\$1.4
Excise and Fees	\$135.4	\$144.3	\$90.5	\$112.9	\$119.8
Property	\$424.7	\$448.8	\$472.6	\$499.2	\$528.4

Source: Tourism Economics

ECONOMIC IMPACTS IN CONTEXT

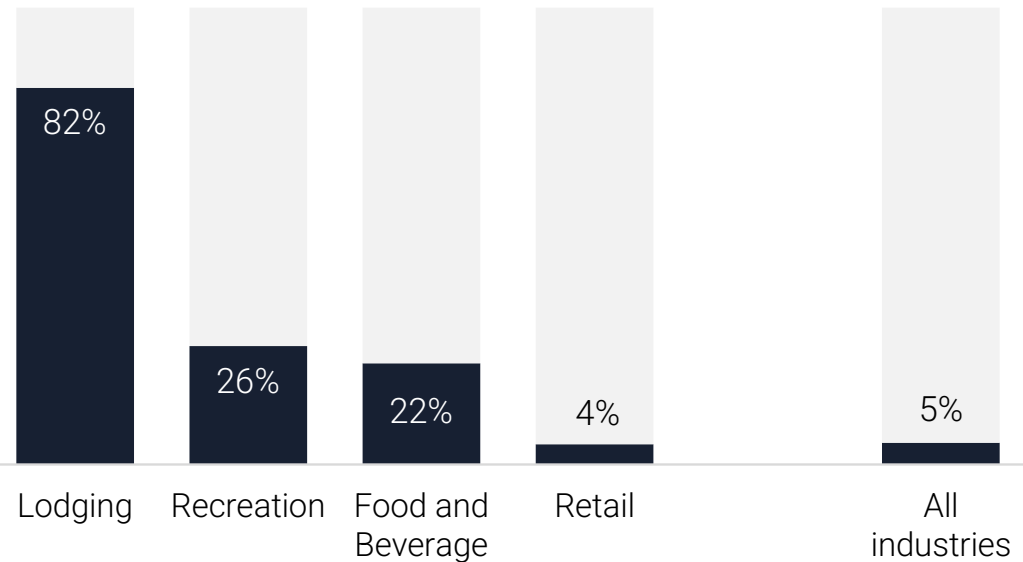
DIRECT TOURISM INDUSTRY

Visitor-supported employment is a significant part of several industries in Maryland—nearly all lodging employment, 26% of recreation employment, and 22% of food and beverage jobs, is supported by visitor spending.

Overall, direct tourism jobs accounted for 5% of all jobs in Maryland in 2022.

Direct tourism employment intensity

Amounts in percentage of total industry employment



Source: Tourism Economics



ECONOMIC IMPACTS IN CONTEXT



\$19.4B VISITOR SPENDING

The \$19.4 billion in visitor spending is enough to pay every rostered player on both the Baltimore Ravens and Orioles 68 times.



\$9.7B LABOR INCOME

The \$9.7 billion in total income generated by tourism is the equivalent of \$4,219 for every household in Maryland.



187,296 TOTAL JOBS

If all 187,296 visitor-supported employees stood shoulder-to-shoulder, they would span the full Ocean City Boardwalk 14 times.



\$2.3B STATE & LOCAL TAXES

The \$2.3 billion in state and local taxes generated by tourism would cover the average salaries of 30,900 public school teachers in Maryland.

COUNTY ANALYSIS, 2022

October 2022

Prepared for: Maryland Office of Tourism

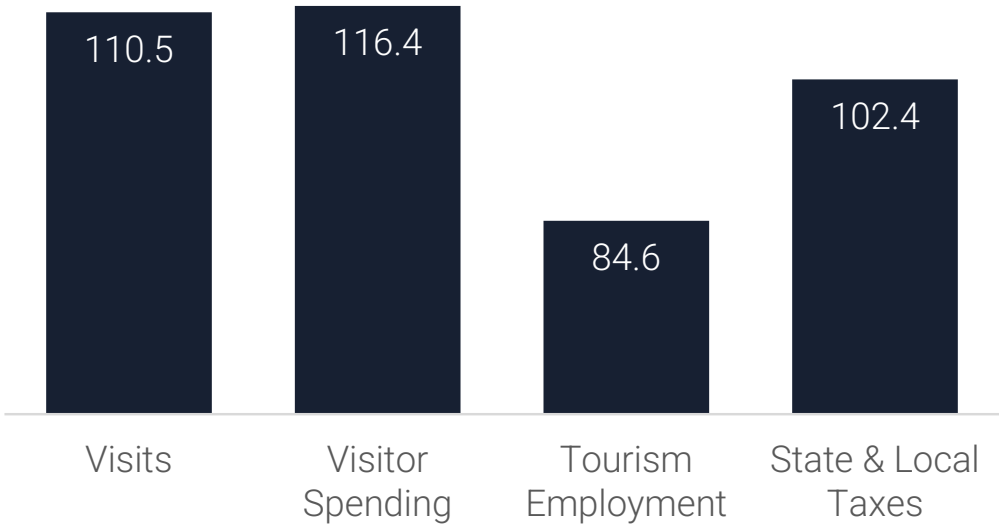


ALLEGANY COUNTY HIGHLIGHTS

Many key tourism indicators for Allegany County have reached or surpassed pre-pandemic (2019) levels in 2022.

Allegany County key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Allegany County grew to 111% of 2019 levels.

Allegany County visitor volume

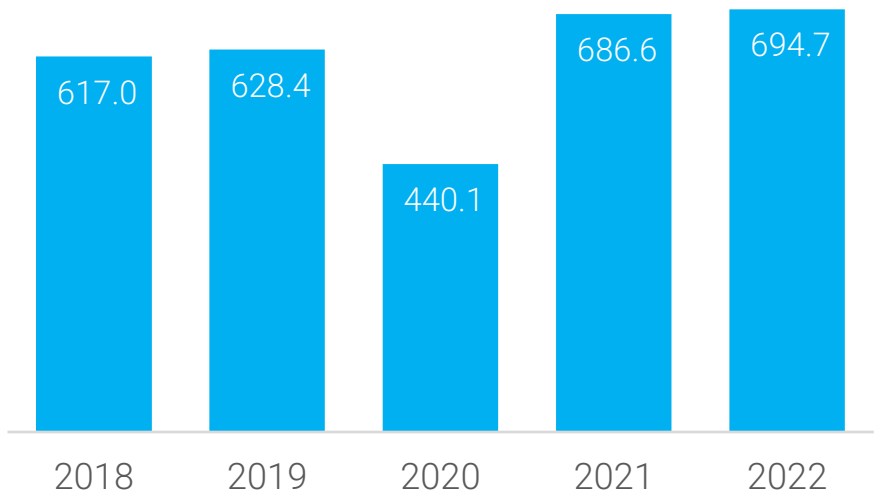
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	318.5	324.1	230.1	338.9	355.6
Overnight	298.6	304.3	210.0	347.7	339.1
Total Visitors	617.0	628.4	440.1	686.6	694.7
Growth rate		1.8%	-30.0%	56.0%	1.2%

Source: D. K. Shifflet, Tourism Economics

Allegany County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



ALLEGANY COUNTY VISITOR SPENDING

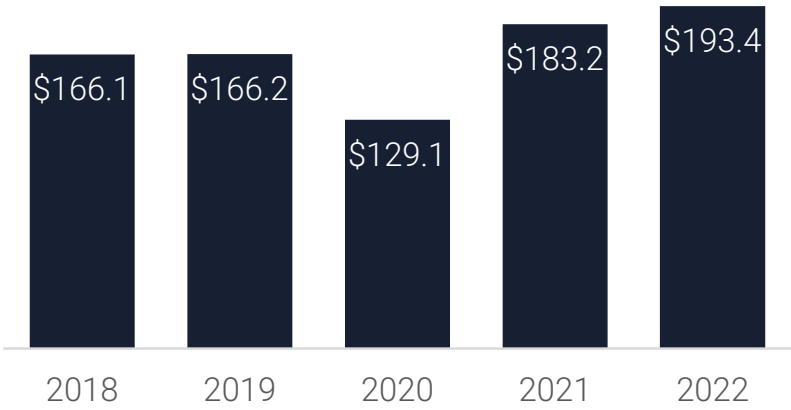
Visitor spending grew 6% in Allegany County to surpass pre-pandemic levels by 16%.

Allegany County visitor spending and annual growth
Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$166.1	\$166.2	\$129.1	\$183.2	\$193.4	5.6%	116.4%
Lodging*	\$31.8	\$32.2	\$24.7	\$35.9	\$38.1	6.2%	118.2%
Food & beverage	\$41.0	\$42.0	\$36.5	\$49.5	\$52.1	5.4%	124.1%
Retail	\$21.7	\$21.4	\$20.3	\$26.0	\$26.7	2.7%	124.9%
Recreation	\$24.6	\$23.7	\$16.0	\$23.1	\$24.9	7.9%	104.9%
Transportation**	\$47.0	\$46.8	\$31.7	\$48.8	\$51.6	5.8%	110.2%

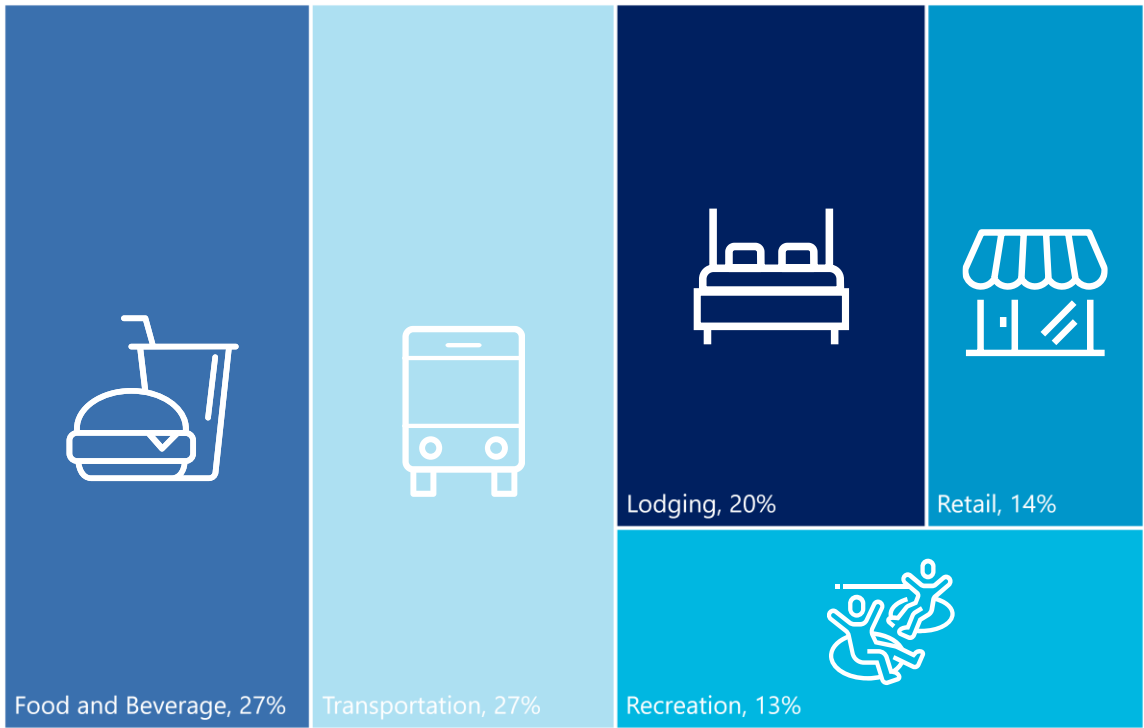
* Lodging includes 2nd home spending
** Transportation includes both ground and air transportation
Source: D. K. Shifflet, Tourism Economics

Allegany County visitor spending
Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category
Percent of total



Source: D. K. Shifflet, Tourism Economics

ALLEGANY COUNTY ECONOMIC IMPACTS

Over 2,900 visitor-supported jobs represent close to 11% of all jobs in Allegany County.

Visitor impacts in Allegany County

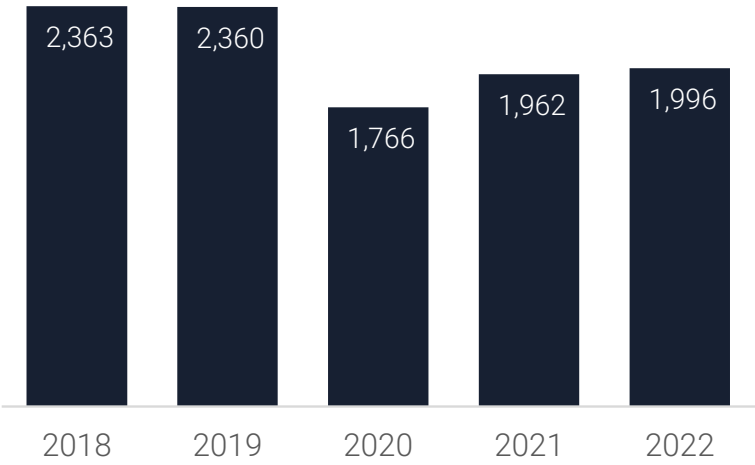
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	2,363	2,360	1,766	1,962	1,996	1.8%	84.6%
Total	3,441	3,440	2,687	2,878	2,909	1.1%	84.6%
Share of State	1.52%	1.52%	1.62%	1.66%	1.55%		
Labor Income							
Direct	\$61.8	\$62.4	\$50.3	\$61.5	\$64.2	4.4%	102.9%
Total	\$113.8	\$115.5	\$96.7	\$111.3	\$114.5	2.9%	99.2%
Share of State	1.10%	1.09%	1.19%	1.27%	1.18%		
Tax revenues							
Federal	\$23.4	\$23.7	\$17.9	\$21.6	\$22.8	5.2%	96.3%
State & Local	\$24.1	\$24.2	\$19.7	\$24.2	\$24.8	2.3%	102.4%
Hotel	\$1.6	\$1.5	\$0.9	\$1.6	\$1.7	8.9%	113.5%
Total	\$49.0	\$49.4	\$38.5	\$47.5	\$49.3	3.8%	99.8%

Source: Tourism Economics

Allegany County direct employment timeline

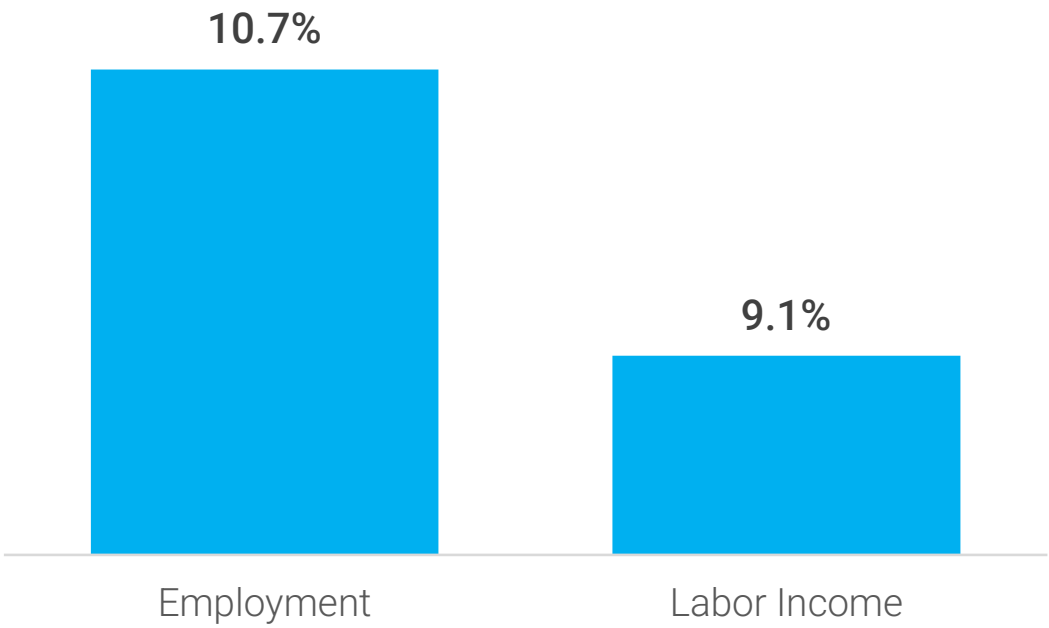
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

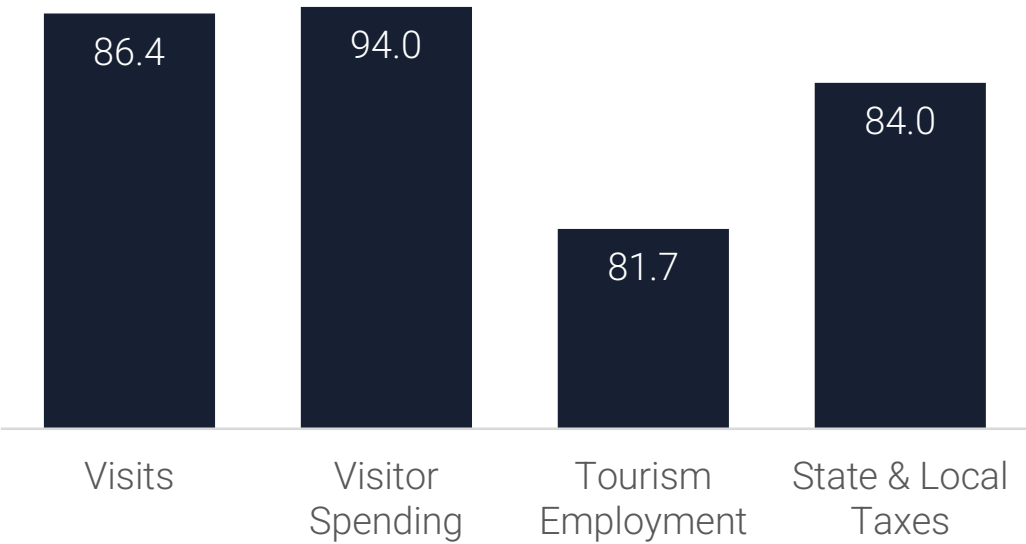


ANNE ARUNDEL COUNTY HIGHLIGHTS

Led by visitor spending, all key tourism indicators for Anne Arundel County have surpassed 80% of pre-pandemic (2019) levels in 2022.

Anne Arundel County key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Anne Arundel County rebounded to 86% of 2019 levels.

Anne Arundel County visitor volume

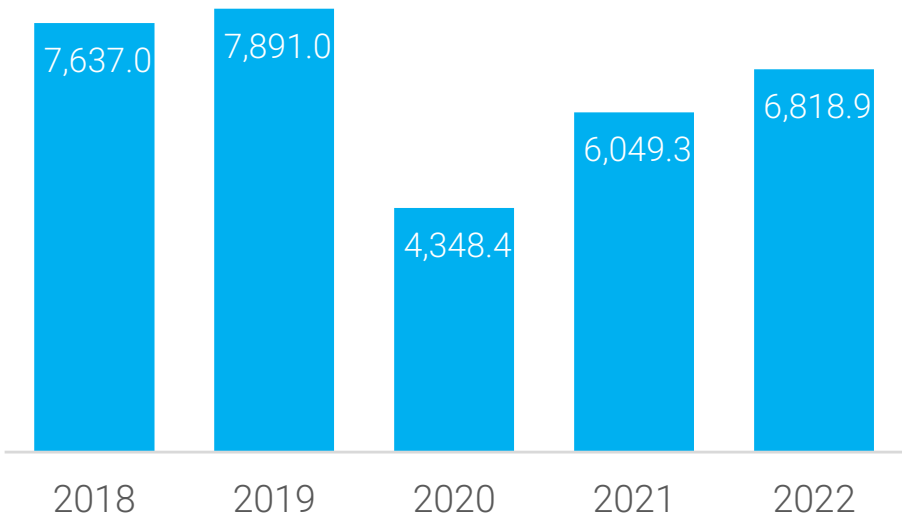
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	4,405.6	4,574.3	2,434.1	3,606.9	4,217.9
Overnight	3,231.4	3,316.7	1,914.2	2,442.4	2,601.0
Total Visitors	7,637.0	7,891.0	4,348.4	6,049.3	6,818.9
Growth rate		3.3%	-44.9%	39.1%	12.7%

Source: D. K. Shifflet, Tourism Economics

Anne Arundel County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



ANNE ARUNDEL COUNTY VISITOR SPENDING

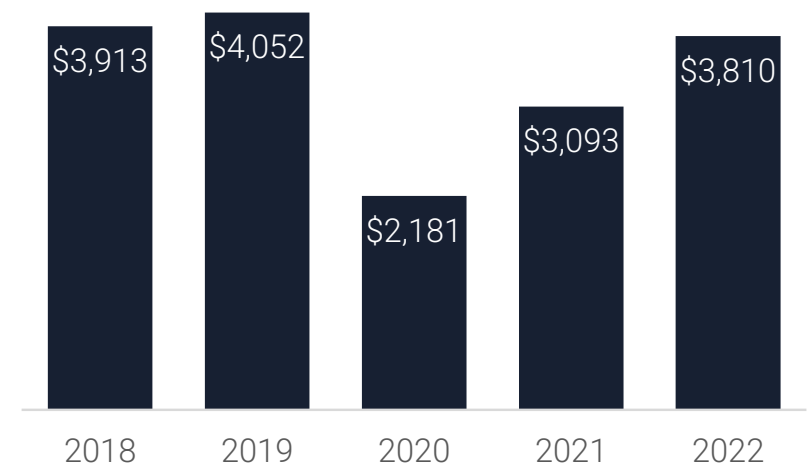
Visitor spending grew 23% in Anne Arundel County to \$3.8 billion.

Anne Arundel County visitor spending and annual growth
Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$3,912.8	\$4,051.5	\$2,181.2	\$3,093.4	\$3,810.2	23.2%	94.0%
Lodging*	\$369.9	\$383.8	\$232.9	\$319.3	\$451.1	41.3%	117.5%
Food & beverage	\$479.7	\$501.5	\$367.2	\$470.8	\$575.0	22.1%	114.7%
Retail	\$308.0	\$317.0	\$231.1	\$294.2	\$338.6	15.1%	106.8%
Recreation	\$344.0	\$338.8	\$209.5	\$303.9	\$400.0	31.6%	118.0%
Transportation**	\$2,411.1	\$2,510.4	\$1,140.6	\$1,705.2	\$2,045.4	20.0%	81.5%

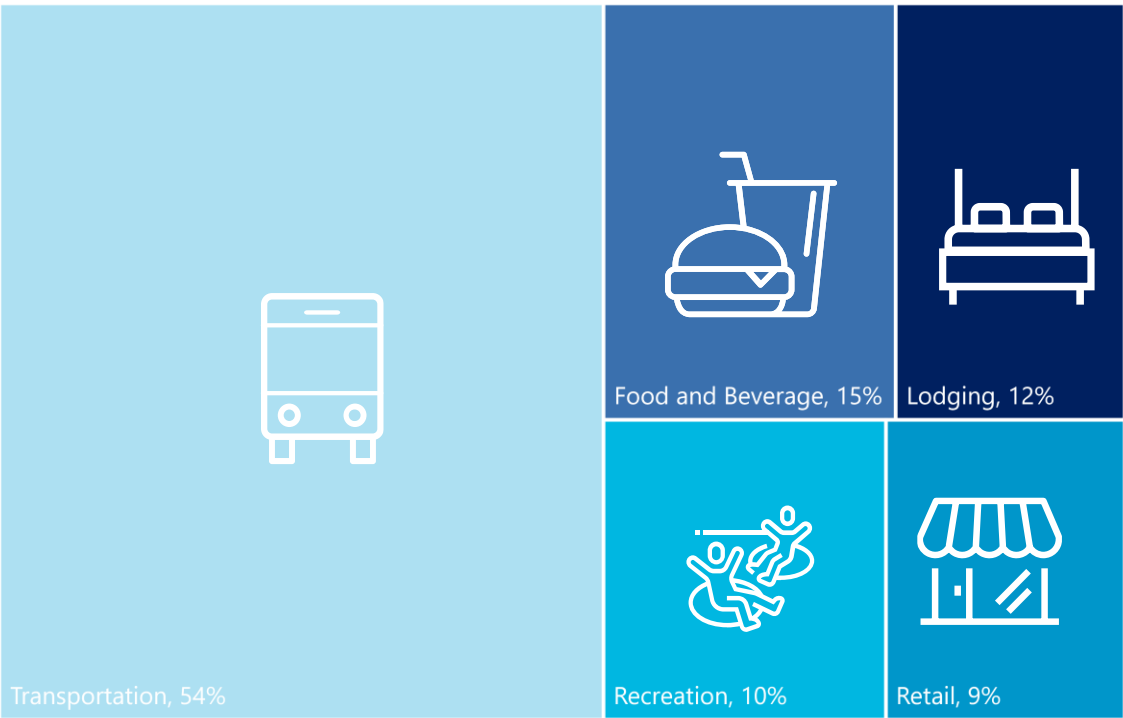
* Lodging includes 2nd home spending
** Transportation includes both ground and air transportation
Source: D. K. Shifflet, Tourism Economics

Anne Arundel County visitor spending
Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category
Percent of total



Source: D. K. Shifflet, Tourism Economics

ANNE ARUNDEL COUNTY ECONOMIC IMPACTS

More than 25,000 visitor-supported jobs represents 10% of all jobs in Anne Arundel County. Tourism industry growth led the county in 2022.

Visitor impacts in Anne Arundel County

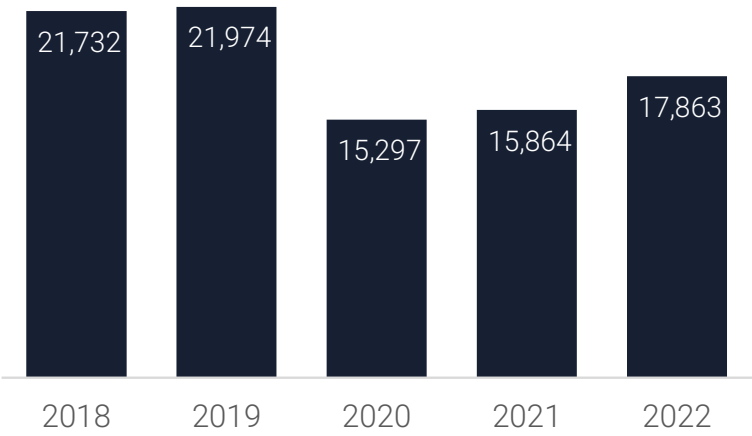
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	21,732	21,974	15,297	15,864	17,863	12.6%	81.3%
Total	31,115	31,463	23,086	23,246	25,708	10.6%	81.7%
Share of State	13.75%	13.90%	13.91%	13.38%	13.73%		
Labor Income							
Direct	\$1,163.0	\$1,184.9	\$909.8	\$971.7	\$1,124.2	15.7%	94.9%
Total	\$1,913.9	\$1,954.8	\$1,580.2	\$1,614.6	\$1,814.7	12.4%	92.8%
Share of State	18.55%	18.40%	19.52%	18.50%	18.75%		
Tax revenues							
Federal	\$415.3	\$424.7	\$293.7	\$321.2	\$372.5	16.0%	87.7%
State & Local	\$492.0	\$508.9	\$307.0	\$360.5	\$427.6	18.6%	84.0%
Hotel	\$20.4	\$21.0	\$9.2	\$12.7	\$19.7	55.2%	93.7%
Total	\$927.6	\$954.6	\$610.0	\$694.4	\$819.8	18.1%	85.9%

Source: Tourism Economics

Anne Arundel County direct employment timeline

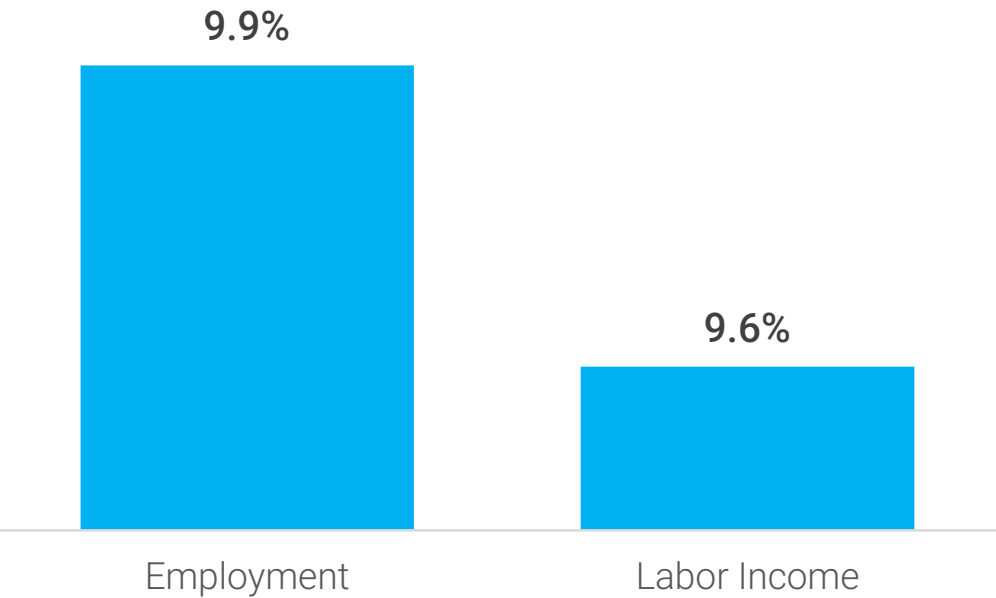
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

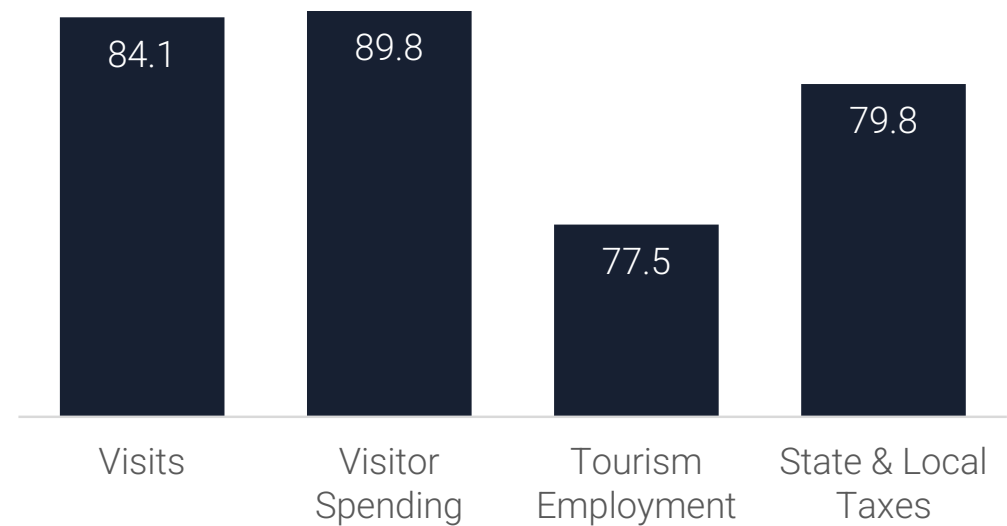


CITY OF BALTIMORE HIGHLIGHTS

Led by visitor spending, key tourism indicators for City of Baltimore have recovered past 75% of pre-pandemic levels in all categories.

City of Baltimore key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in City of Baltimore rebounded to 5.3 million, 84% of 2019 levels.

City of Baltimore visitor volume

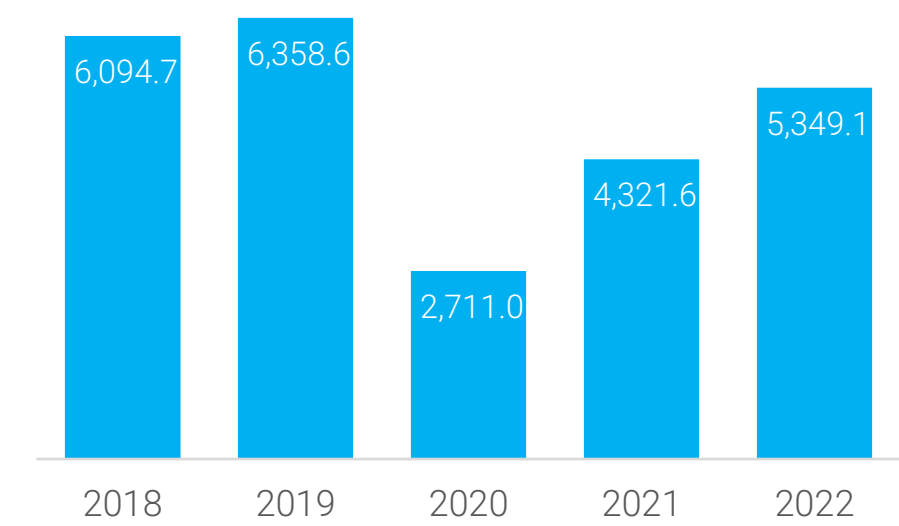
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	3,453.6	3,615.8	1,673.3	2,665.1	3,411.1
Overnight	2,641.1	2,742.8	1,037.7	1,656.4	1,938.0
Total Visitors	6,094.7	6,358.6	2,711.0	4,321.6	5,349.1
Growth rate		4.3%	-57.4%	59.4%	23.8%

Source: D. K. Shifflet, Tourism Economics

City of Baltimore visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



CITY OF BALTIMORE VISITOR SPENDING

Visitor spending grew 34% in City of Baltimore to surpass \$2 billion in 2022.

City of Baltimore visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2022

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$2,220.8	\$2,295.8	\$936.8	\$1,539.3	\$2,062.3	34.0%	89.8%
Lodging*	\$405.1	\$419.3	\$137.0	\$243.7	\$370.9	52.2%	88.5%
Food & beverage	\$556.5	\$586.7	\$261.0	\$403.7	\$520.4	28.9%	88.7%
Retail	\$313.4	\$320.5	\$138.8	\$206.1	\$275.2	33.5%	85.9%
Recreation	\$340.6	\$331.9	\$117.0	\$192.5	\$251.4	30.6%	75.7%
Transportation**	\$605.3	\$637.5	\$283.0	\$493.3	\$644.5	30.6%	101.1%

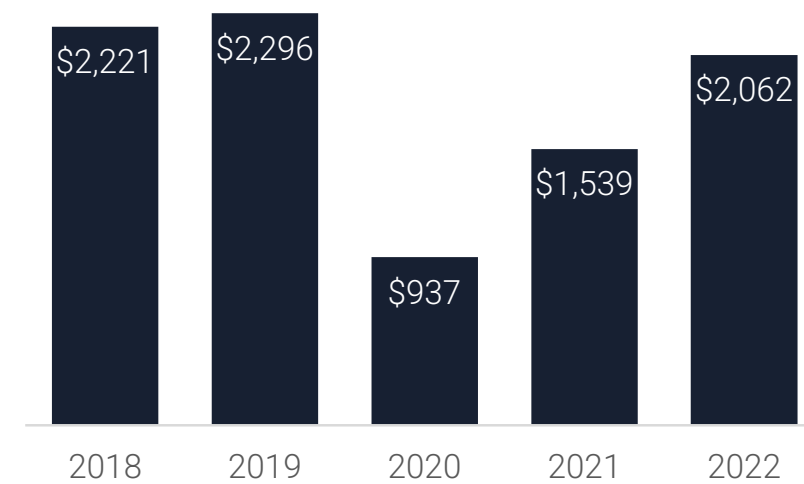
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

City of Baltimore visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

CITY OF BALTIMORE ECONOMIC IMPACTS

More than 21,000 visitor-supported jobs represent close to 6% of all jobs in City of Baltimore.

Visitor impacts in City of Baltimore

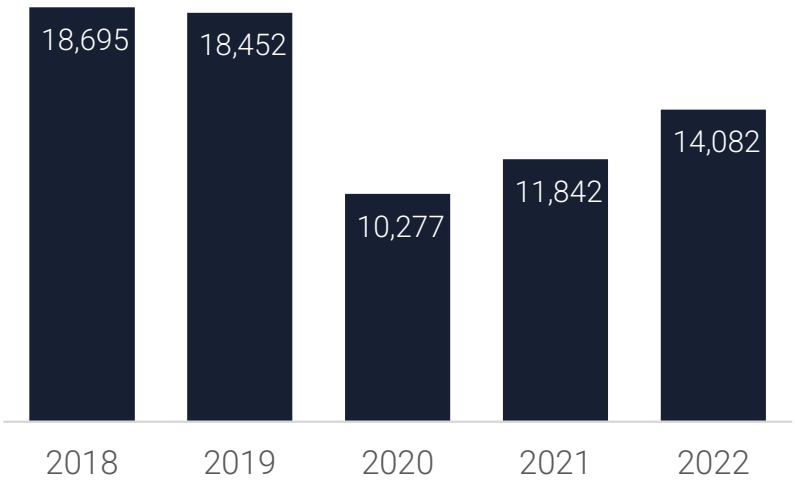
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	18,695	18,452	10,277	11,842	14,082	18.9%	76.3%
Total	27,812	27,527	16,745	18,458	21,346	15.6%	77.5%
Share of State	12.29%	12.16%	10.09%	10.63%	11.40%		
Labor Income							
Direct	\$766.2	\$764.7	\$415.6	\$513.9	\$633.0	23.2%	82.8%
Total	\$1,330.1	\$1,334.8	\$799.1	\$928.4	\$1,099.7	18.4%	82.4%
Share of State	12.89%	12.56%	9.87%	10.64%	11.36%		
Tax revenues							
Federal	\$278.8	\$280.7	\$145.2	\$180.8	\$221.9	22.7%	79.0%
State & Local	\$316.9	\$329.4	\$147.5	\$204.6	\$262.8	28.4%	79.8%
Hotel	\$33.0	\$36.1	\$11.2	\$21.3	\$30.5	43.0%	84.4%
Total	\$628.7	\$646.3	\$303.9	\$406.7	\$515.1	26.6%	79.7%

Source: Tourism Economics

City of Baltimore direct employment timeline

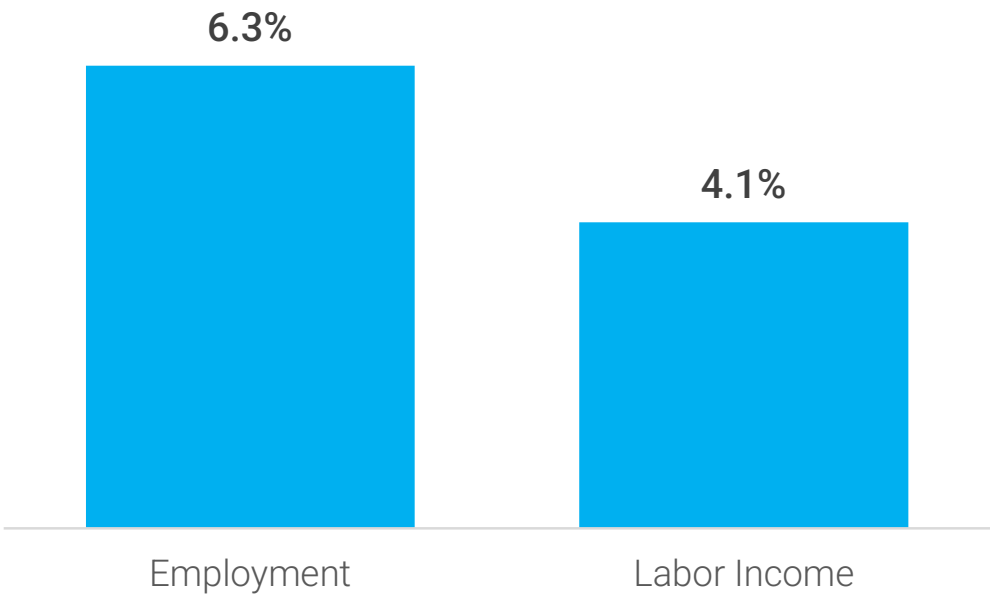
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

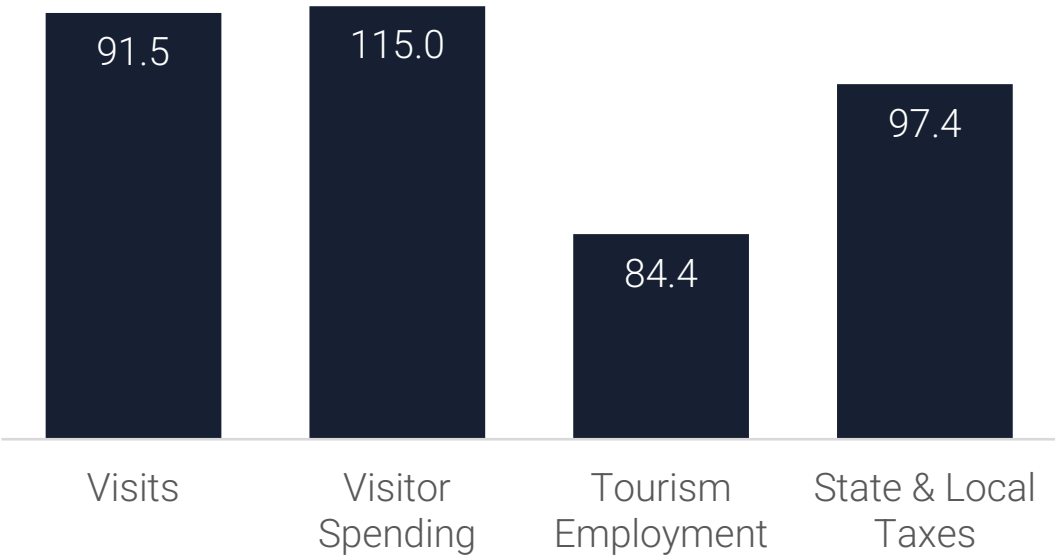


BALTIMORE COUNTY HIGHLIGHTS

Visitor spending in Baltimore County surpassed pre-pandemic levels for the first time in 2022.

Baltimore County key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Baltimore County rebounded to 91% of 2019 levels.

Baltimore County visitor volume

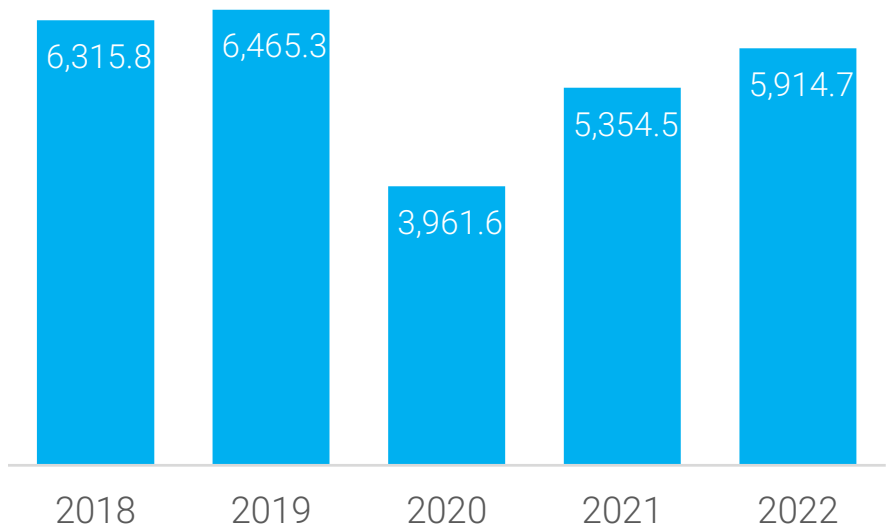
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	3,527.3	3,659.7	2,347.4	3,305.5	3,702.1
Overnight	2,788.4	2,805.6	1,614.3	2,049.0	2,212.7
Total Visitors	6,315.8	6,465.3	3,961.6	5,354.5	5,914.7
Growth rate		2.4%	-38.7%	35.2%	10.5%

Source: D. K. Shifflet, Tourism Economics

Baltimore County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



BALTIMORE COUNTY VISITOR SPENDING

Visitor spending grew 20% in Baltimore County to 115% of pre-pandemic levels.

Baltimore County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$1,294.6	\$1,298.2	\$959.1	\$1,246.4	\$1,492.4	19.7%	115.0%
Lodging*	\$172.3	\$171.0	\$127.1	\$172.7	\$217.8	26.1%	127.4%
Food & beverage	\$332.0	\$340.2	\$280.9	\$357.0	\$413.5	15.8%	121.5%
Retail	\$214.5	\$207.7	\$168.6	\$203.0	\$222.2	9.4%	107.0%
Recreation	\$190.2	\$184.7	\$135.5	\$179.4	\$230.5	28.5%	124.8%
Transportation**	\$385.5	\$394.6	\$247.0	\$334.3	\$408.5	22.2%	103.5%

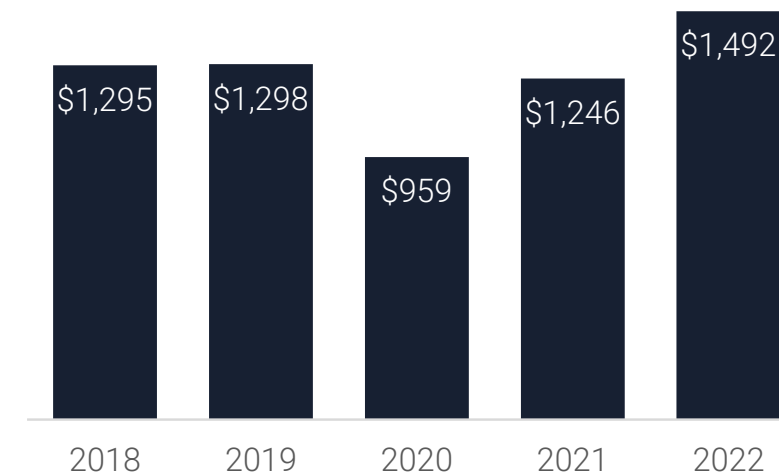
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Baltimore County visitor spending

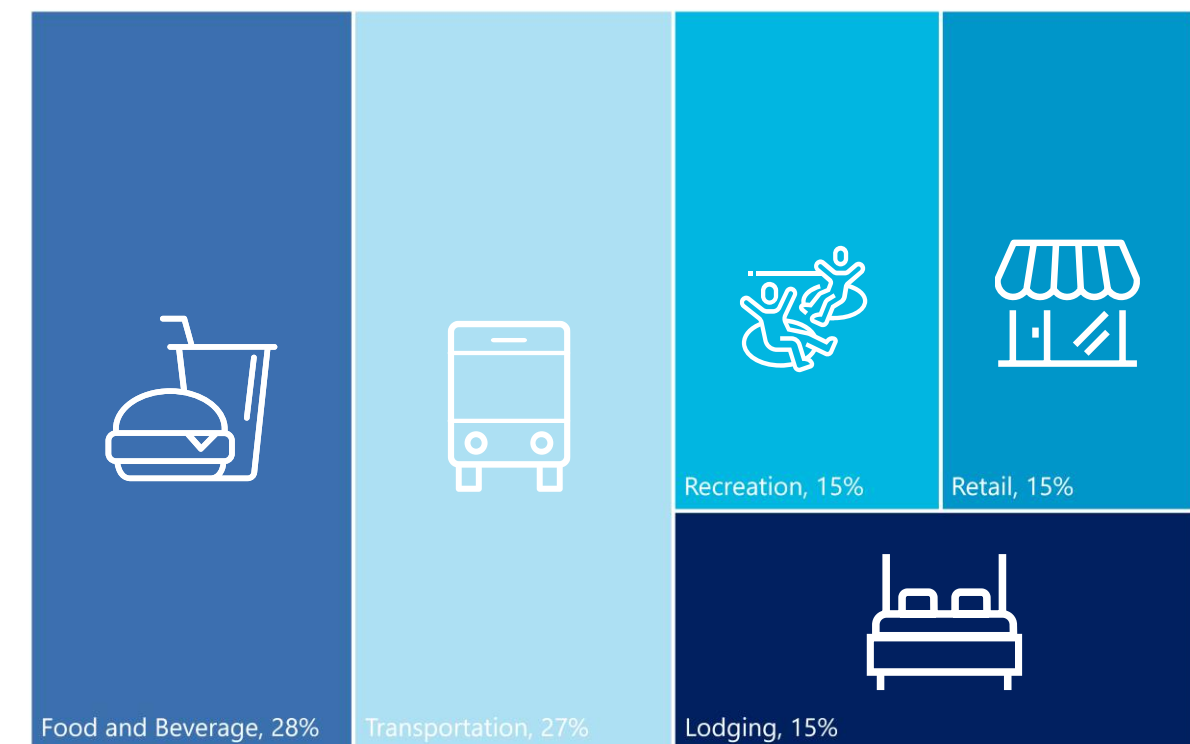
Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

BALTIMORE COUNTY ECONOMIC IMPACTS

More than 17,000 visitor-supported jobs represent almost 5% of all jobs in Baltimore County.

Visitor impacts in Baltimore County

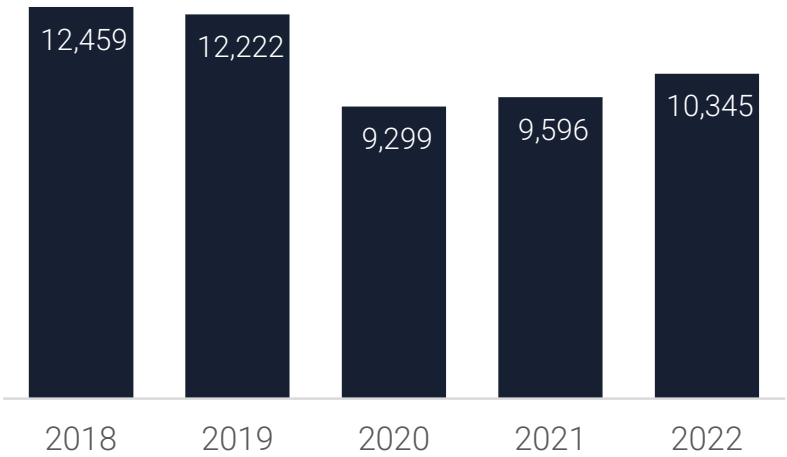
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	12,459	12,222	9,299	9,596	10,345	7.8%	84.6%
Total	20,715	20,425	16,040	16,172	17,234	6.6%	84.4%
Share of State	9.16%	9.02%	9.66%	9.31%	9.20%		
Labor Income							
Direct	\$469.8	\$474.8	\$362.4	\$381.3	\$424.9	11.5%	89.5%
Total	\$929.8	\$945.1	\$753.0	\$767.5	\$836.4	9.0%	88.5%
Share of State	9.01%	8.90%	9.30%	8.79%	8.64%		
Tax revenues							
Federal	\$189.8	\$192.4	\$138.4	\$149.0	\$167.6	12.4%	87.1%
State & Local	\$194.8	\$197.0	\$152.3	\$168.1	\$191.8	14.1%	97.4%
Hotel	\$10.3	\$10.2	\$7.9	\$10.5	\$13.1	24.7%	128.1%
Total	\$394.9	\$399.6	\$298.5	\$327.6	\$372.5	13.7%	93.2%

Source: Tourism Economics

Baltimore County direct employment timeline

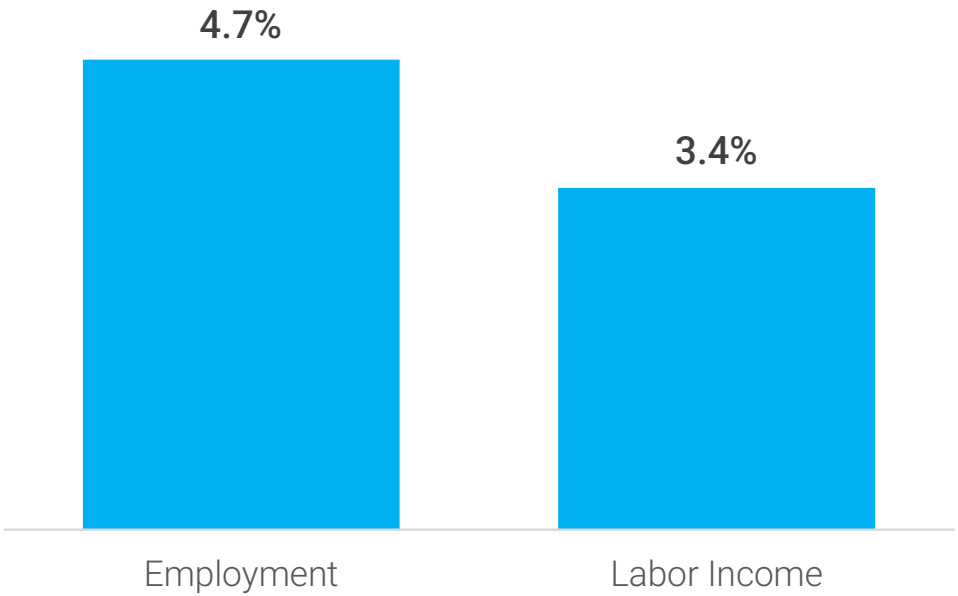
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



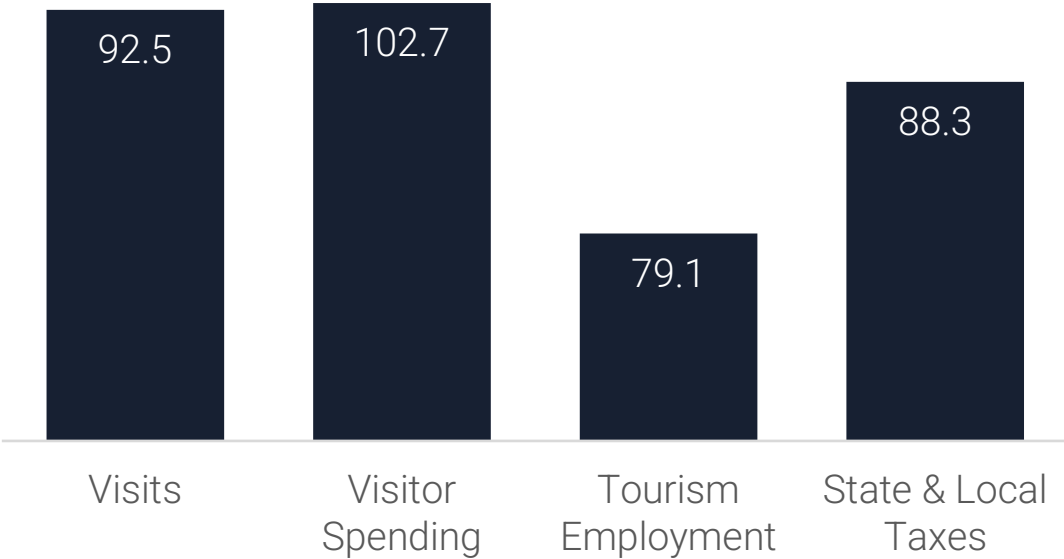
Source: BLS, Tourism Economics



CALVERT COUNTY HIGHLIGHTS

Visits and taxes supported by visitors in Calvert County have recovered to around 90% of pre-pandemic (2019) levels in 2022.

Calvert County key indicators
Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

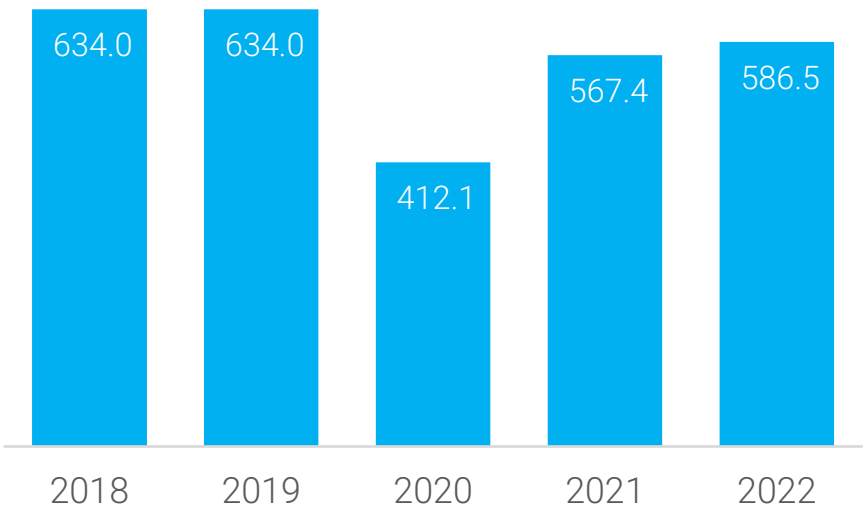
Visitor volume in 2022 in Calvert County rebounded to 93% of 2019 levels.

Calvert County visitor volume
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	335.1	337.7	229.7	327.5	351.3
Overnight	298.9	296.4	182.4	239.9	235.2
Total Visitors	634.0	634.0	412.1	567.4	586.5
Growth rate		0.0%	-35.0%	37.7%	3.4%

Source: D. K. Shifflet, Tourism Economics

Calvert County visitor volume
Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



CALVERT COUNTY VISITOR SPENDING

Visitor spending grew 2% in Calvert County past pre-pandemic levels

Calvert County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$141.2	\$143.7	\$108.2	\$144.7	\$147.7	2.1%	102.7%
Lodging*	\$44.8	\$45.5	\$33.0	\$42.1	\$42.3	0.5%	93.0%
Food & beverage	\$36.7	\$37.7	\$29.9	\$38.2	\$38.3	0.2%	101.8%
Retail	\$15.8	\$15.8	\$13.6	\$16.7	\$17.4	4.4%	110.1%
Recreation	\$22.2	\$22.6	\$15.5	\$20.2	\$20.9	3.7%	92.5%
Transportation**	\$21.7	\$22.2	\$16.2	\$27.4	\$28.7	4.7%	129.5%

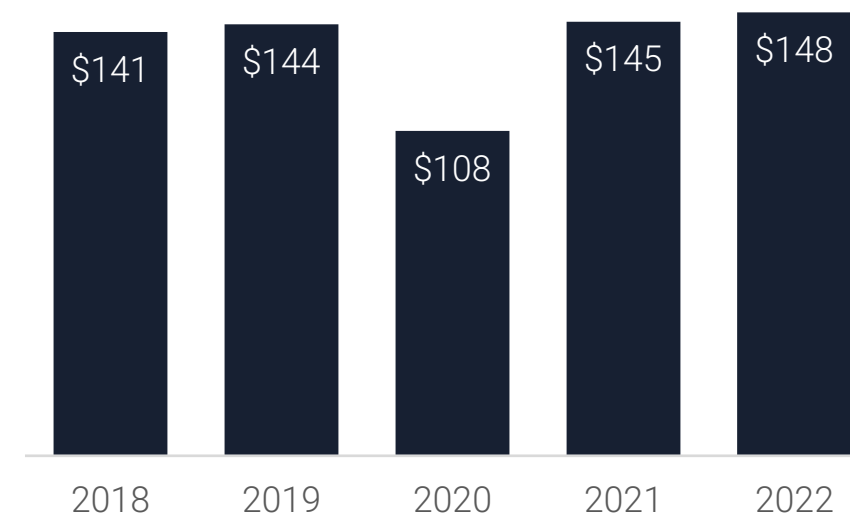
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Calvert County visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

CALVERT COUNTY ECONOMIC IMPACTS

More than 1,600 visitor-supported jobs represent 7.5% of all jobs in Calvert County.

Visitor impacts in Calvert County

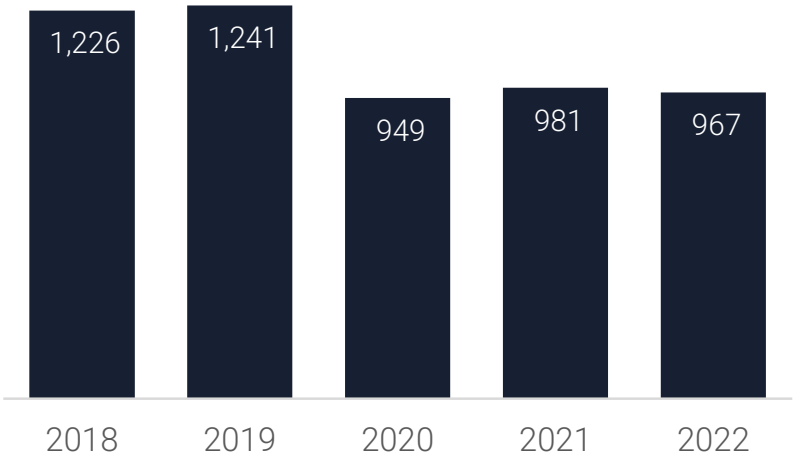
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	1,226	1,241	949	981	967	-1.5%	77.9%
Total	2,013	2,034	1,607	1,622	1,610	-0.7%	79.1%
Share of State	0.89%	0.90%	0.97%	0.93%	0.86%		
Labor Income							
Direct	\$41.6	\$43.5	\$34.9	\$36.6	\$36.8	0.8%	84.7%
Total	\$87.0	\$90.7	\$74.9	\$76.2	\$76.4	0.3%	84.3%
Share of State	0.84%	0.85%	0.92%	0.87%	0.79%		
Tax revenues							
Federal	\$18.2	\$18.8	\$14.0	\$15.1	\$15.5	2.3%	82.2%
State & Local	\$20.2	\$20.6	\$16.2	\$18.2	\$18.2	-0.4%	88.3%
Hotel	\$0.8	\$0.7	\$0.4	\$0.6	\$0.7	10.7%	93.7%
Total	\$39.1	\$40.1	\$30.7	\$34.0	\$34.3	1.0%	85.5%

Source: Tourism Economics

Calvert County direct employment timeline

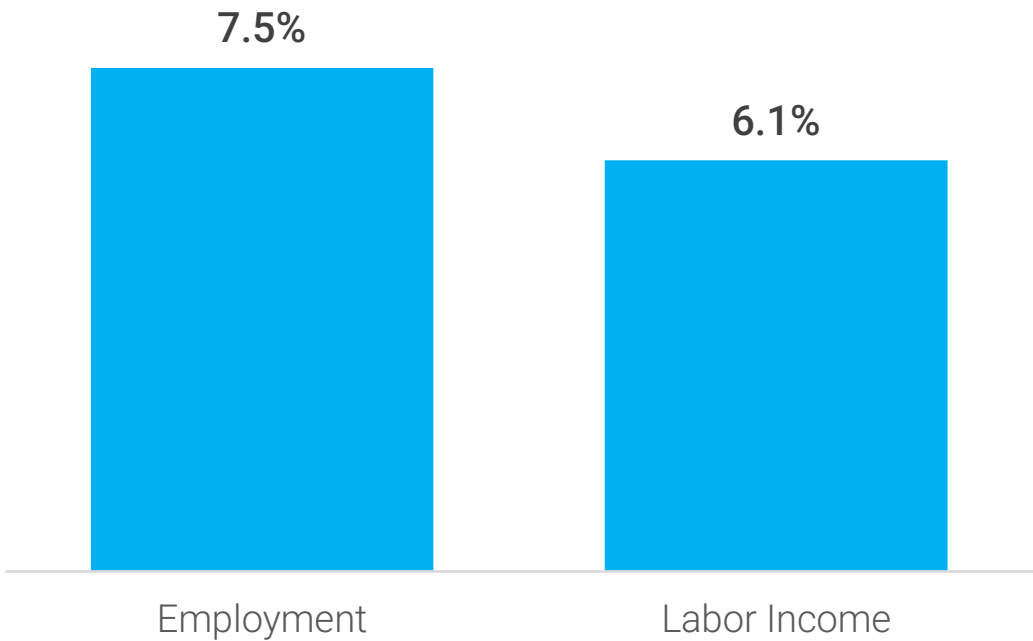
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



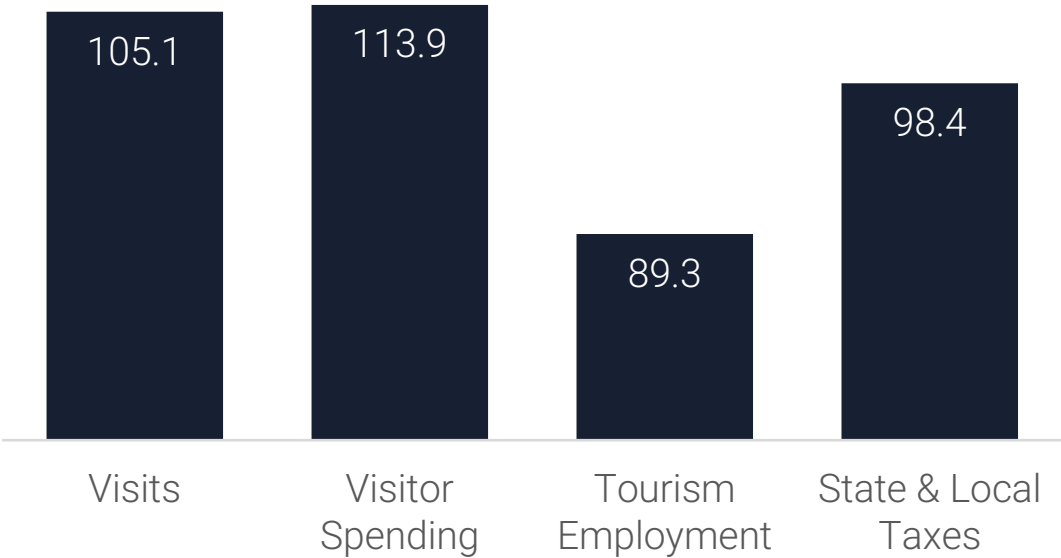
Source: BLS, Tourism Economics



CAROLINE COUNTY HIGHLIGHTS

Visits and visitor spending in Caroline County surpassed pre-pandemic (2019) levels in 2022.

Caroline County key indicators
Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Caroline County rebounded to 105% of 2019 levels.

Caroline County visitor volume

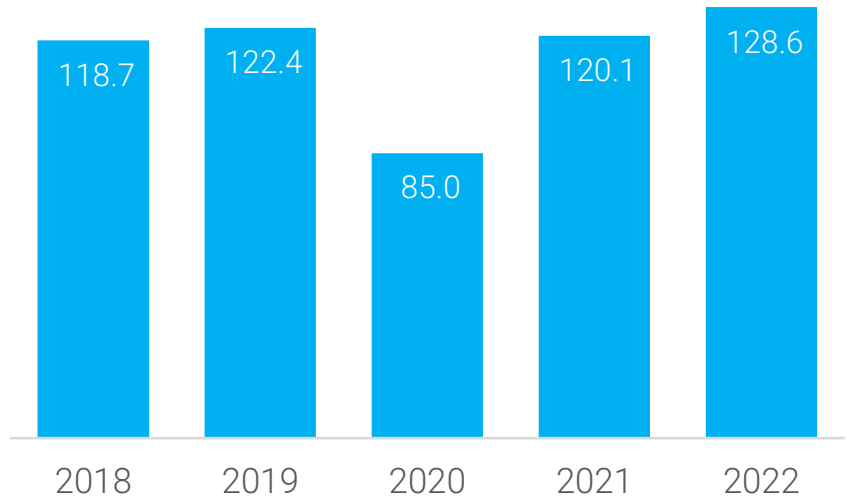
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	39.8	41.3	40.6	59.7	66.6
Overnight	79.0	81.0	44.4	60.4	62.0
Total Visitors	118.7	122.4	85.0	120.1	128.6
Growth rate		3.1%	-30.5%	41.2%	7.1%

Source: D. K. Shifflet, Tourism Economics

Caroline County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



CAROLINE COUNTY VISITOR SPENDING

Visitor spending grew 16% in Caroline County to 114% of pre-pandemic levels

Caroline County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$15.7	\$16.4	\$12.0	\$16.0	\$18.7	16.6%	113.9%
Lodging*	\$3.0	\$3.1	\$2.3	\$2.8	\$3.1	9.7%	98.4%
Food & beverage	\$3.9	\$4.3	\$3.3	\$4.3	\$5.0	16.2%	116.2%
Retail	\$2.0	\$2.0	\$1.8	\$2.3	\$2.6	11.3%	130.5%
Recreation	\$1.2	\$1.1	\$0.7	\$1.0	\$1.3	22.2%	109.0%
Transportation**	\$5.6	\$5.8	\$3.8	\$5.5	\$6.7	21.5%	115.7%

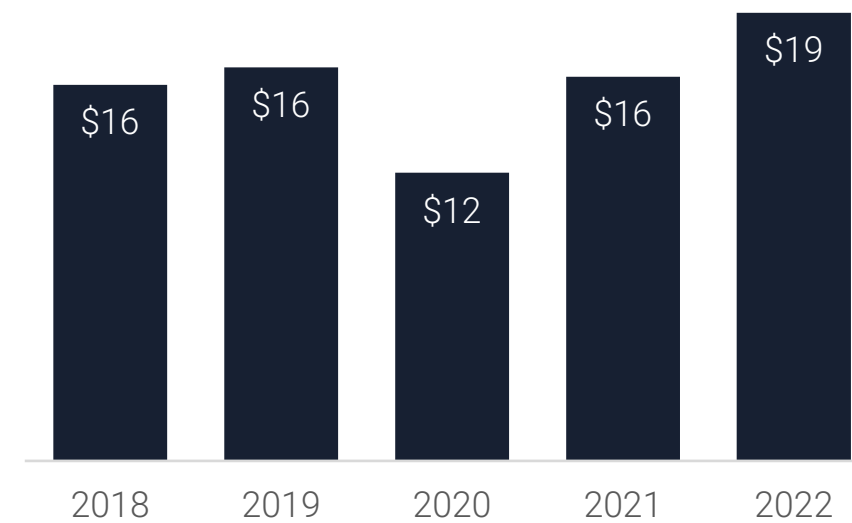
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Caroline County visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

CAROLINE COUNTY ECONOMIC IMPACTS

425 visitor-supported jobs represent 4.3% of all jobs in Caroline County.

Visitor impacts in Caroline County

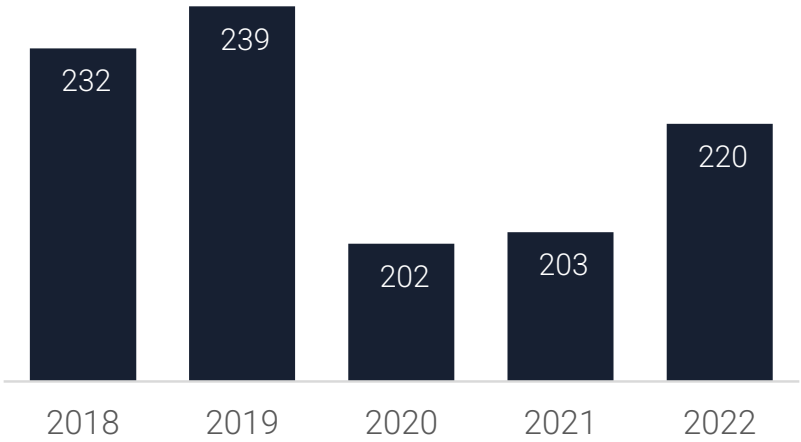
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	232	239	202	203	220	8.4%	92.3%
Total	467	476	397	397	425	7.1%	89.3%
Share of State	0.21%	0.21%	0.24%	0.23%	0.23%		
Labor Income							
Direct	\$7.6	\$8.1	\$6.6	\$6.9	\$7.8	12.6%	96.2%
Total	\$20.3	\$21.4	\$17.5	\$18.1	\$19.9	10.1%	93.0%
Share of State	0.20%	0.20%	0.22%	0.21%	0.21%		
Tax revenues							
Federal	\$3.9	\$4.1	\$3.0	\$3.3	\$3.7	13.0%	90.8%
State & Local	\$2.8	\$2.9	\$2.3	\$2.6	\$2.8	10.8%	98.4%
Hotel	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	24.4%	120.1%
Total	\$6.7	\$7.0	\$5.3	\$5.9	\$6.6	12.1%	94.1%

Source: Tourism Economics

Caroline County direct employment timeline

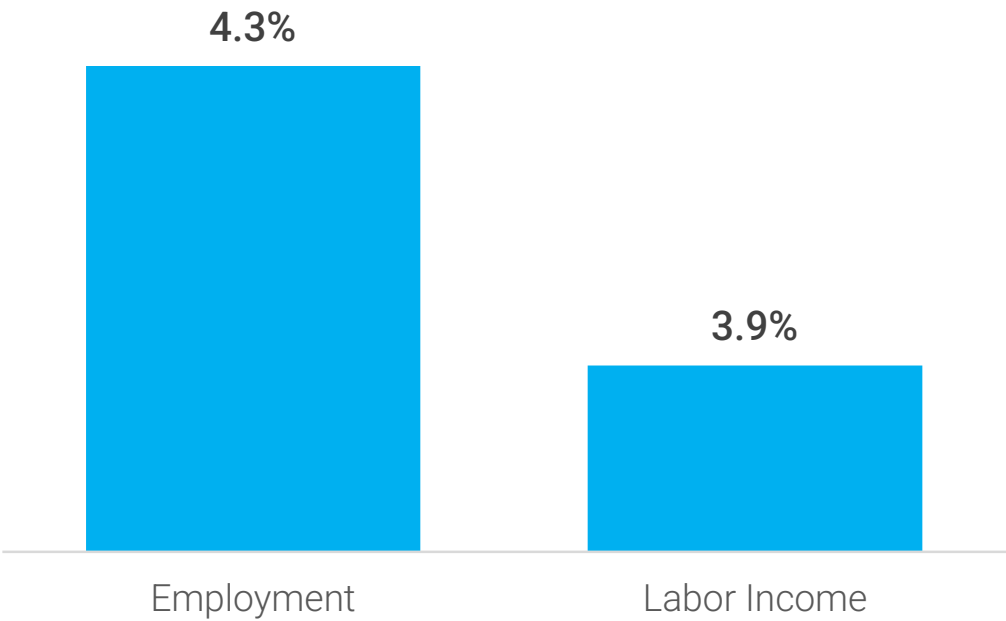
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



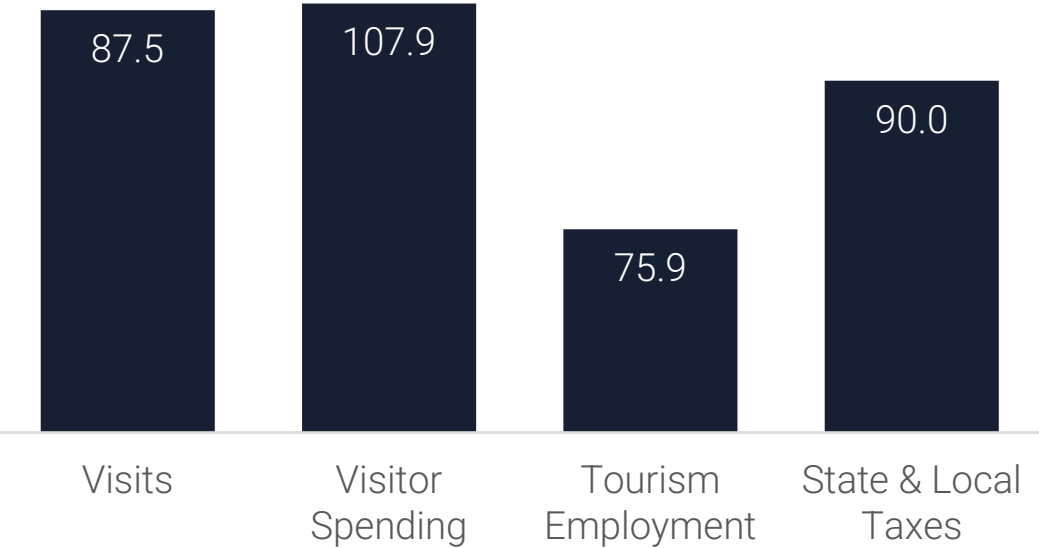
Source: BLS, Tourism Economics



CARROLL COUNTY HIGHLIGHTS

Visitor spending in Carroll County surpassed pre-pandemic levels for the first time in 2022.

Carroll County key indicators
Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Carroll County rebounded to 88% of 2019 levels.

Carroll County visitor volume

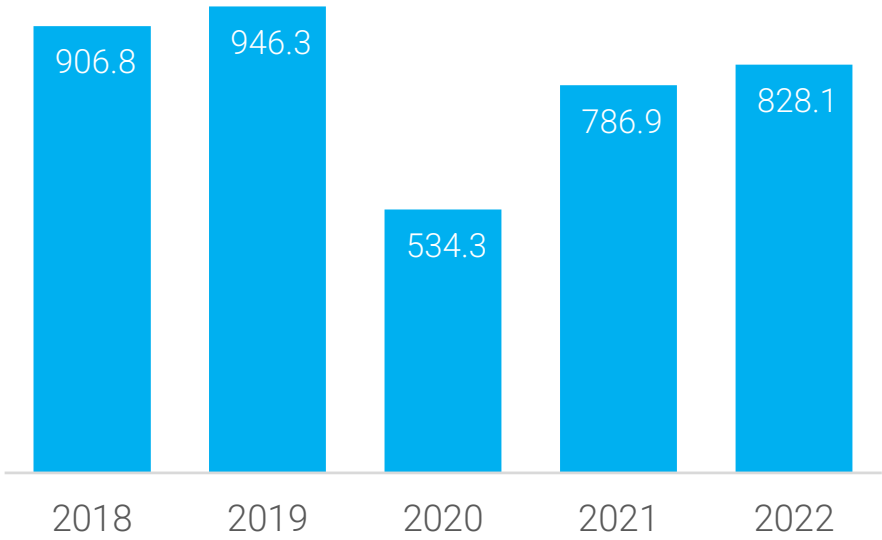
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	497.6	528.3	318.6	486.2	528.4
Overnight	409.2	418.0	215.7	300.7	299.7
Total Visitors	906.8	946.3	534.3	786.9	828.1
Growth rate		4.4%	-43.5%	47.3%	5.2%

Source: D. K. Shifflet, Tourism Economics

Carroll County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



CARROLL COUNTY VISITOR SPENDING

Visitor spending grew 13% in Carroll County in 2022, reaching \$136 million.

Carroll County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$121.6	\$126.1	\$86.2	\$120.6	\$136.1	12.9%	107.9%
Lodging*	\$12.5	\$13.1	\$9.9	\$13.1	\$14.2	8.4%	108.1%
Food & beverage	\$40.8	\$43.1	\$28.8	\$36.6	\$40.4	10.4%	93.7%
Retail	\$12.8	\$12.5	\$10.3	\$12.4	\$12.9	4.0%	102.6%
Recreation	\$18.2	\$18.8	\$11.9	\$17.2	\$19.9	15.5%	105.9%
Transportation**	\$37.2	\$38.5	\$25.3	\$41.3	\$48.7	18.1%	126.5%

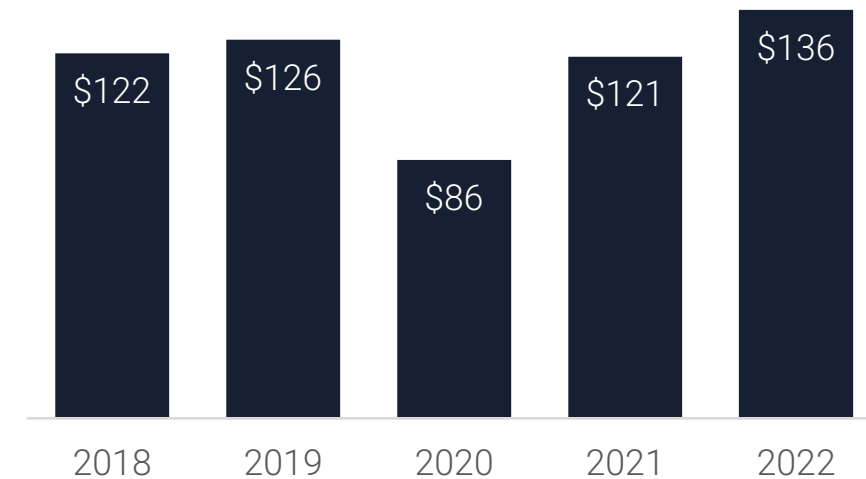
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Carroll County visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

CARROLL COUNTY ECONOMIC IMPACTS

More than 2,800 visitor-supported jobs represent 5% of all jobs in Carroll County.

Visitor impacts in Carroll County

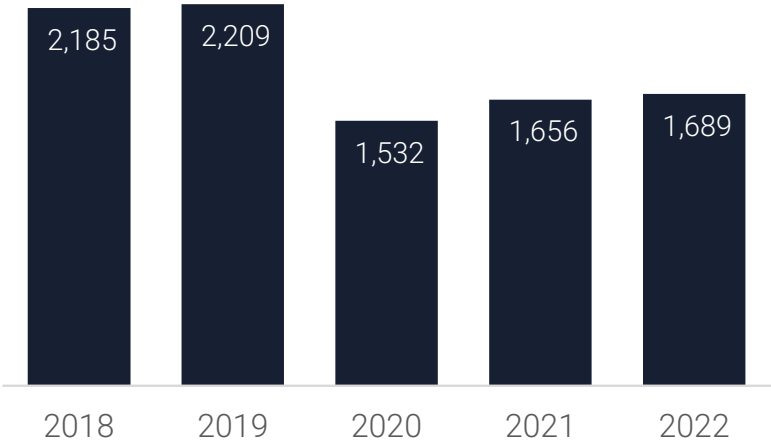
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	2,185	2,209	1,532	1,656	1,689	2.0%	76.5%
Total	3,695	3,729	2,728	2,852	2,831	-0.7%	75.9%
Share of State	1.63%	1.65%	1.64%	1.64%	1.51%		
Labor Income							
Direct	\$63.2	\$66.1	\$47.0	\$53.5	\$56.3	5.2%	85.2%
Total	\$140.6	\$146.5	\$110.6	\$119.8	\$125.8	5.0%	85.8%
Share of State	1.36%	1.38%	1.37%	1.37%	1.30%		
Tax revenues							
Federal	\$27.2	\$28.4	\$19.2	\$22.1	\$23.8	8.0%	84.0%
State & Local	\$20.8	\$21.8	\$15.5	\$18.3	\$19.6	7.1%	90.0%
Hotel	\$0.3	\$0.3	\$0.2	\$0.3	\$0.3	2.2%	100.5%
Total	\$48.4	\$50.4	\$34.9	\$40.7	\$43.7	7.5%	86.7%

Source: Tourism Economics

Carroll County direct employment timeline

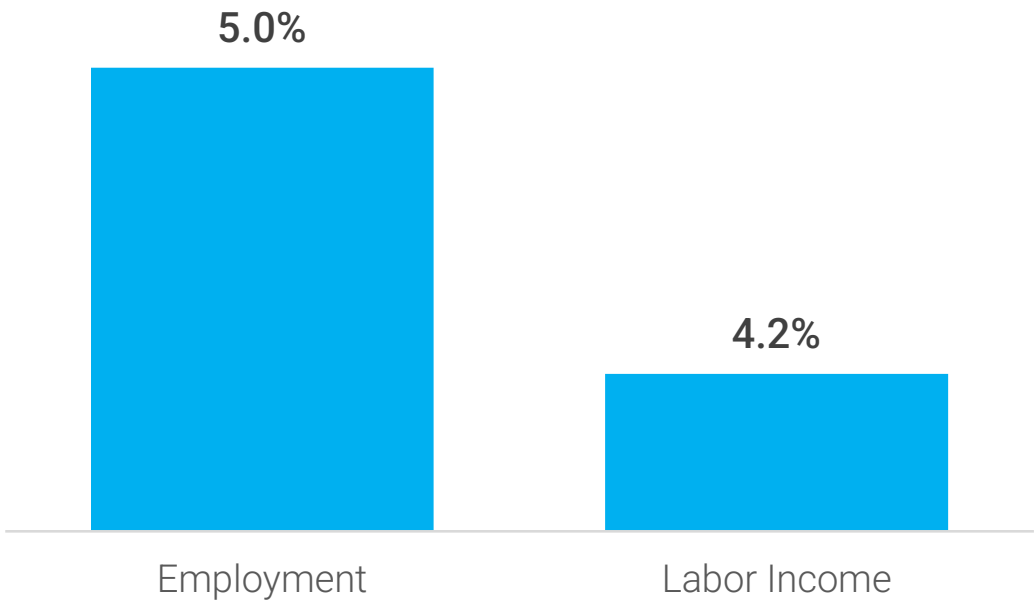
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



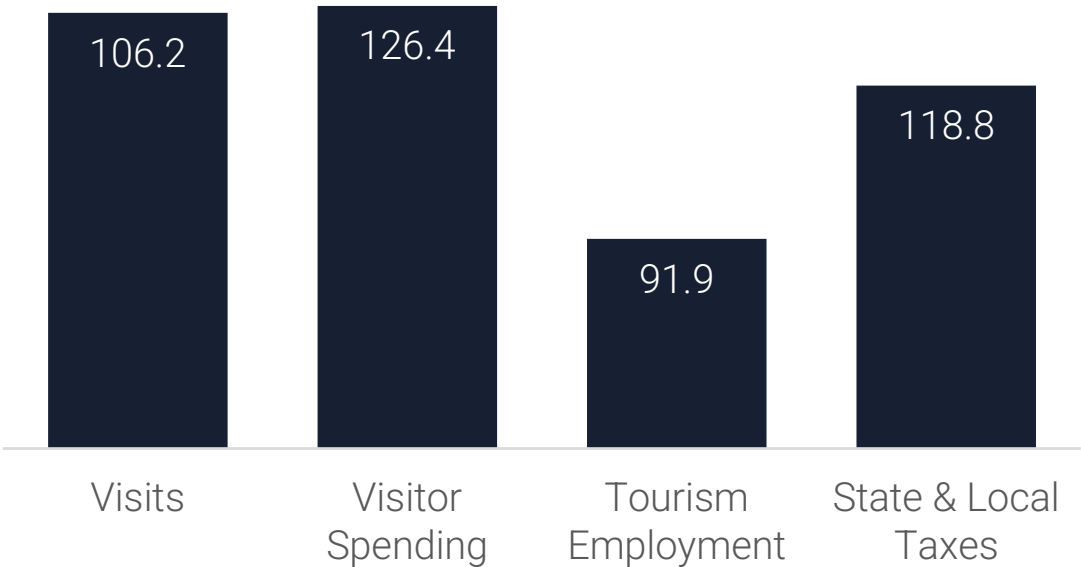
Source: BLS, Tourism Economics



CECIL COUNTY HIGHLIGHTS

Several key indicators in Cecil County has surpassed pre-pandemic (2019) levels in 2022.

Cecil County key indicators
Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Cecil County surpassed 2019 levels by 6%.

Cecil County visitor volume

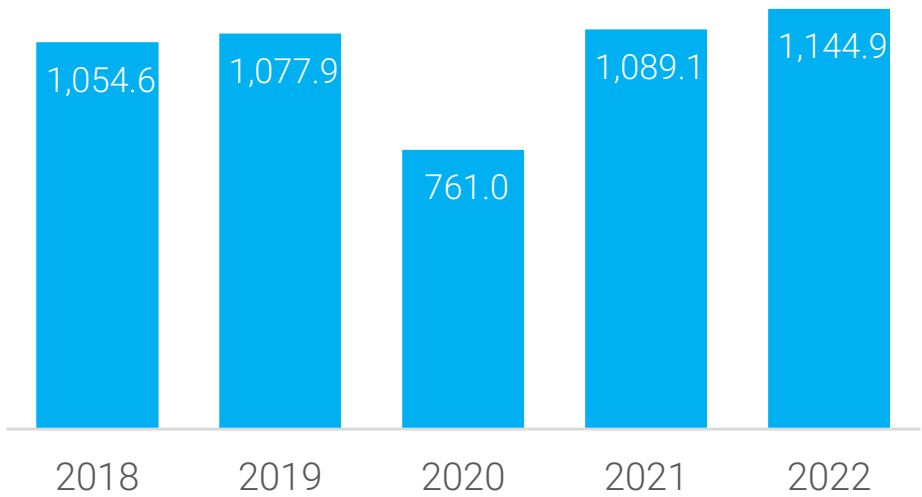
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	664.3	669.4	480.6	718.0	773.8
Overnight	390.3	408.4	280.4	371.1	371.1
Total Visitors	1,054.6	1,077.9	761.0	1,089.1	1,144.9
Growth rate		2.2%	-29.4%	43.1%	5.1%

Source: D. K. Shifflet, Tourism Economics

Cecil County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



CECIL COUNTY VISITOR SPENDING

Visitor spending grew 9% in Cecil County to surpass pre-pandemic levels by 26%.

Cecil County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$182.7	\$191.5	\$165.2	\$221.8	\$242.0	9.1%	126.4%
Lodging*	\$51.8	\$54.8	\$49.0	\$62.1	\$66.4	6.9%	121.2%
Food & beverage	\$41.1	\$43.3	\$40.9	\$52.4	\$57.3	9.3%	132.5%
Retail	\$21.9	\$22.4	\$22.8	\$29.1	\$31.0	6.4%	138.4%
Recreation	\$31.7	\$32.4	\$25.0	\$35.2	\$42.3	20.1%	130.6%
Transportation**	\$36.2	\$38.7	\$27.5	\$43.0	\$45.0	4.8%	116.5%

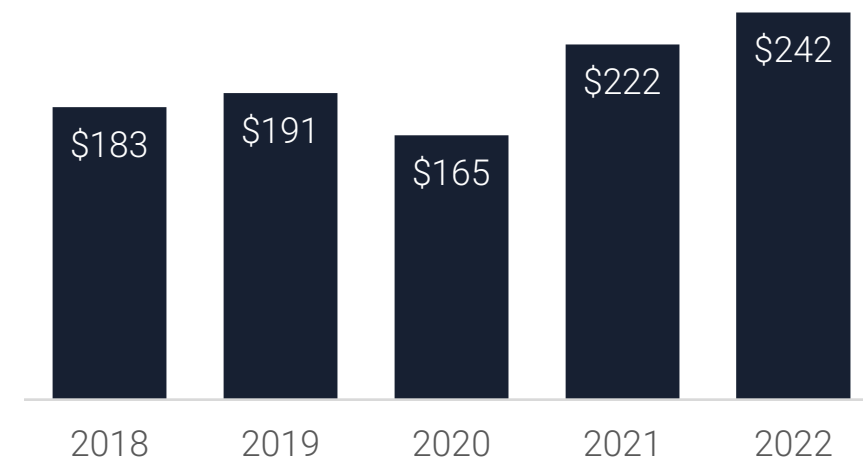
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Cecil County visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

CECIL COUNTY ECONOMIC IMPACTS

2,200 visitor-supported jobs represent 6.5% of all jobs in Cecil County.

Visitor impacts in Cecil County

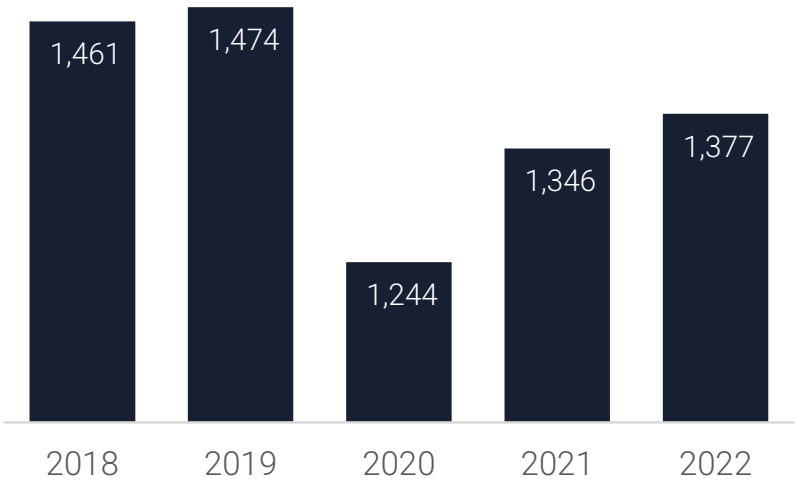
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	1,461	1,474	1,244	1,346	1,377	2.3%	93.5%
Total	2,403	2,426	2,082	2,182	2,229	2.1%	91.9%
Share of State	1.06%	1.07%	1.25%	1.26%	1.19%		
Labor Income							
Direct	\$49.3	\$52.7	\$44.4	\$51.7	\$54.2	4.9%	102.9%
Total	\$102.0	\$108.1	\$92.8	\$102.2	\$106.3	4.0%	98.3%
Share of State	0.99%	1.02%	1.15%	1.17%	1.10%		
Tax revenues							
Federal	\$21.6	\$22.8	\$18.0	\$20.7	\$22.1	6.6%	96.8%
State & Local	\$26.9	\$28.2	\$24.9	\$28.6	\$33.5	17.4%	118.8%
Hotel	\$0.9	\$0.9	\$0.7	\$1.0	\$4.7	364.2%	507.5%
Total	\$49.4	\$52.0	\$43.6	\$50.3	\$60.4	19.9%	116.0%

Source: Tourism Economics

Cecil County direct employment timeline

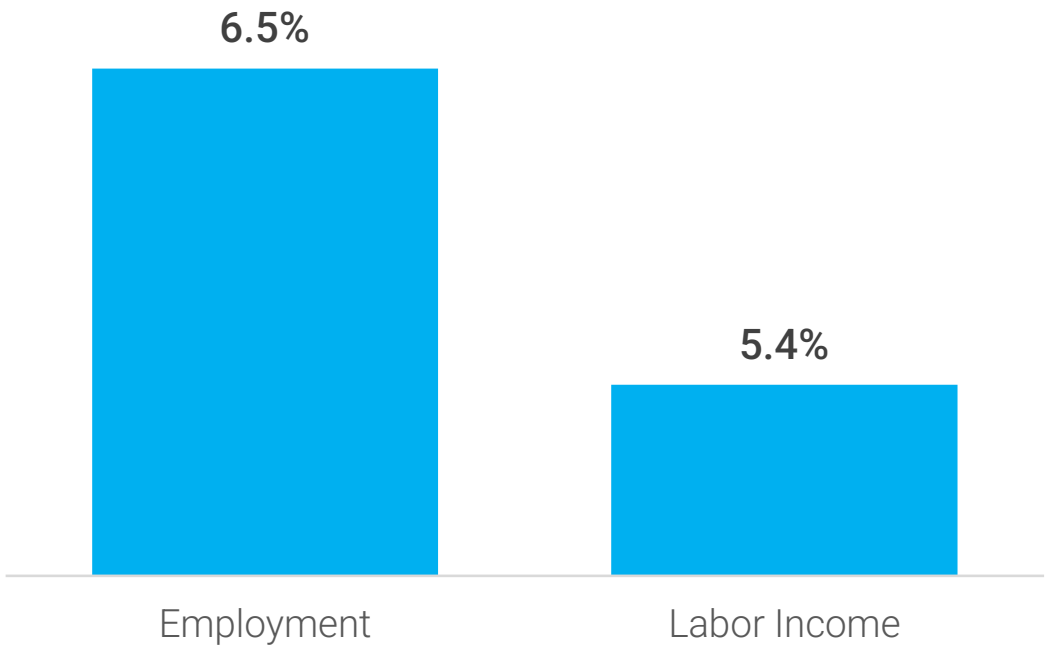
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



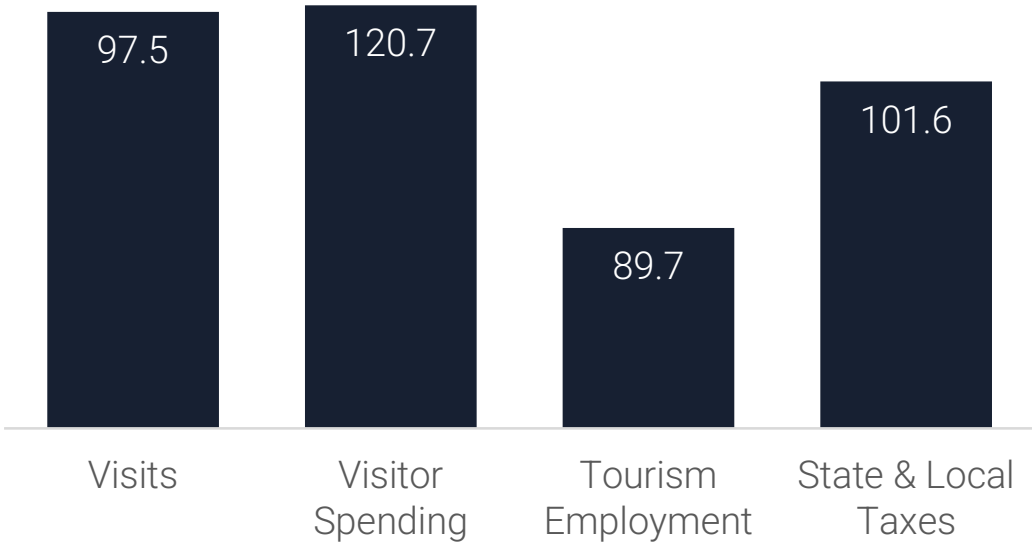
Source: BLS, Tourism Economics



CHARLES COUNTY HIGHLIGHTS

Visitor spending and tax collections in Charles County have surpassed pre-pandemic (2019) levels in 2022.

Charles County key indicators
Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Charles County rebounded to 97% of 2019 levels.

Charles County visitor volume

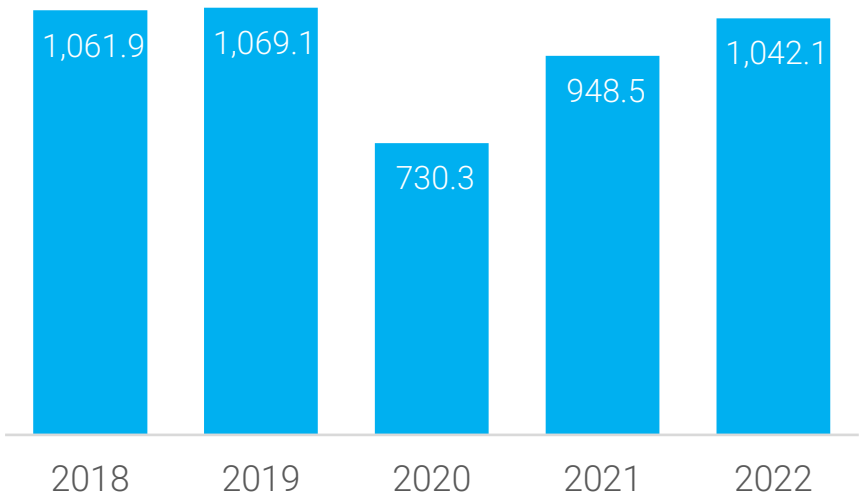
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	531.2	534.1	388.2	542.1	611.6
Overnight	530.6	535.0	342.1	406.5	430.6
Total Visitors	1,061.9	1,069.1	730.3	948.5	1,042.1
Growth rate		0.7%	-31.7%	29.9%	9.9%

Source: D. K. Shifflet, Tourism Economics

Charles County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



CHARLES COUNTY VISITOR SPENDING

Visitor spending grew 26% in Charles County to surpass pre-pandemic levels.

Charles County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$194.9	\$190.1	\$161.1	\$203.8	\$229.6	12.7%	120.7%
Lodging*	\$34.6	\$34.2	\$29.3	\$36.8	\$41.8	13.4%	122.1%
Food & beverage	\$61.3	\$60.7	\$53.3	\$64.8	\$73.9	14.1%	121.9%
Retail	\$33.3	\$31.3	\$27.3	\$30.7	\$33.7	9.8%	107.8%
Recreation	\$20.2	\$18.2	\$15.0	\$18.6	\$22.1	19.0%	121.8%
Transportation**	\$45.5	\$45.8	\$36.2	\$52.9	\$58.0	9.7%	126.6%

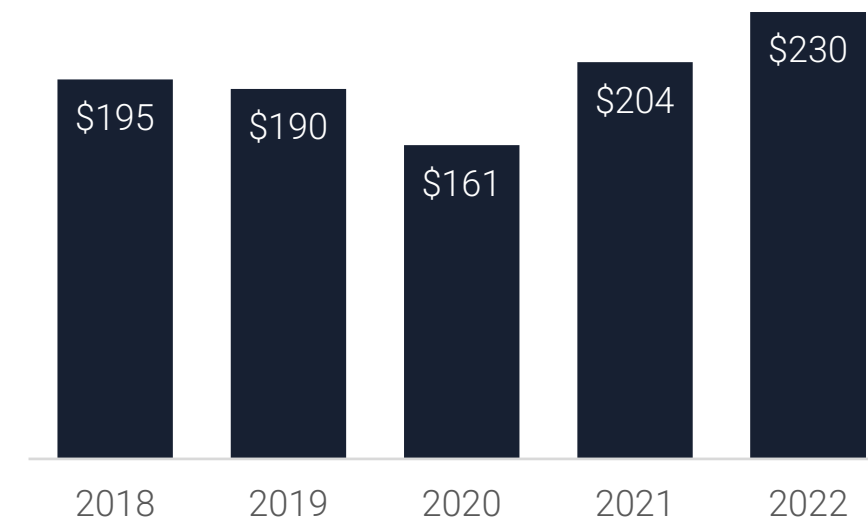
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Charles County visitor spending

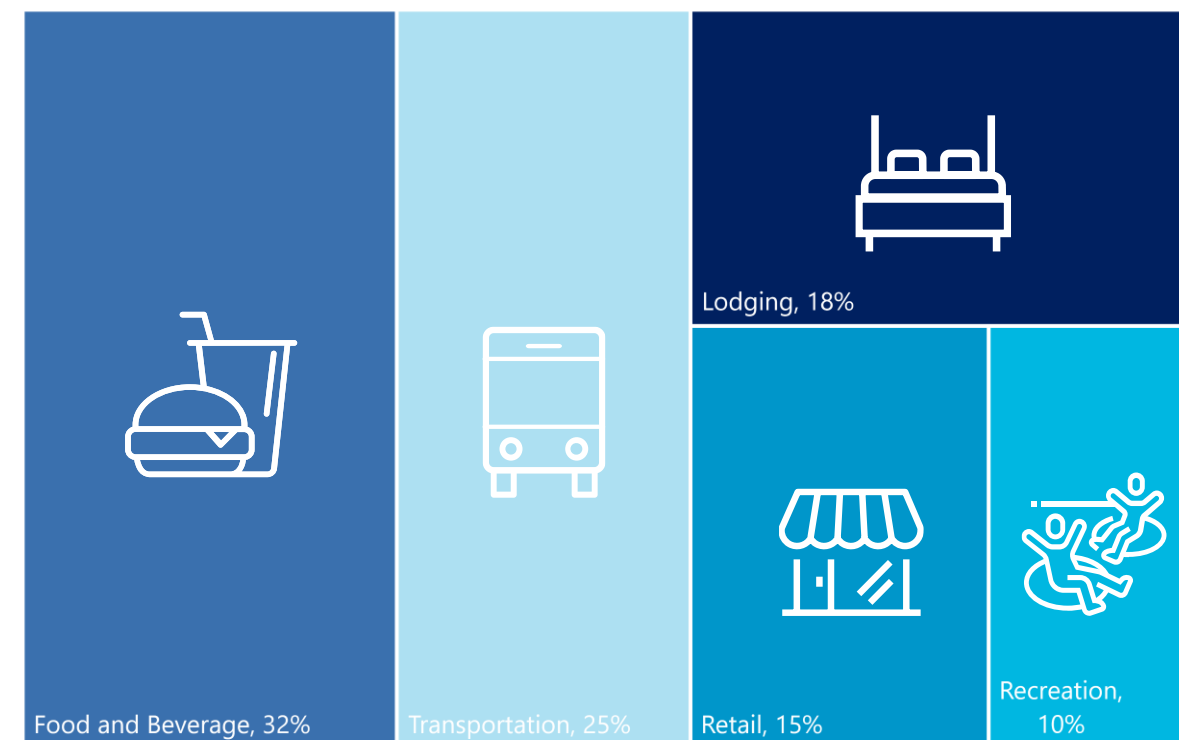
Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

CHARLES COUNTY ECONOMIC IMPACTS

Nearly 2,600 visitor-supported jobs represent 6.6% of all jobs in Charles County.

Visitor impacts in Charles County

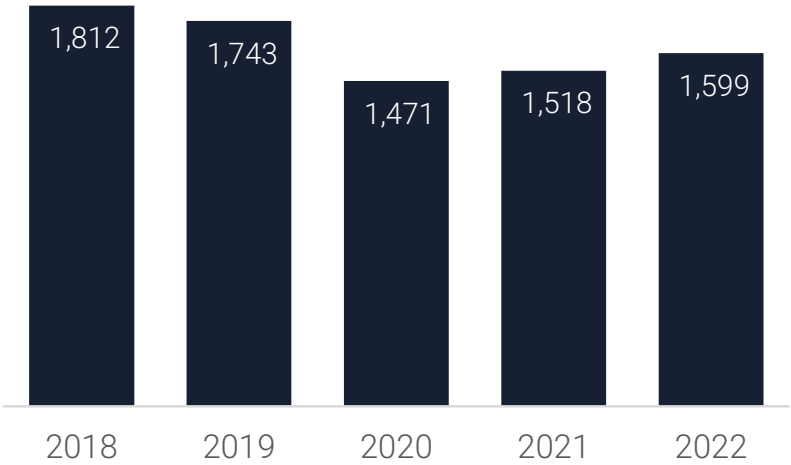
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	1,812	1,743	1,471	1,518	1,599	5.3%	91.7%
Total	3,075	2,990	2,541	2,562	2,681	4.6%	89.7%
Share of State	1.36%	1.32%	1.53%	1.48%	1.43%		
Labor Income							
Direct	\$45.2	\$44.9	\$38.5	\$43.1	\$47.6	10.6%	106.0%
Total	\$108.3	\$109.3	\$93.2	\$99.6	\$108.3	8.7%	99.1%
Share of State	1.05%	1.03%	1.15%	1.14%	1.12%		
Tax revenues							
Federal	\$23.0	\$23.0	\$18.0	\$20.0	\$22.3	11.2%	96.7%
State & Local	\$28.5	\$28.4	\$24.6	\$26.4	\$28.8	9.2%	101.6%
Hotel	\$1.1	\$1.2	\$1.0	\$1.2	\$1.4	22.9%	116.9%
Total	\$52.6	\$52.6	\$43.6	\$47.6	\$52.5	10.3%	99.8%

Source: Tourism Economics

Charles County direct employment timeline

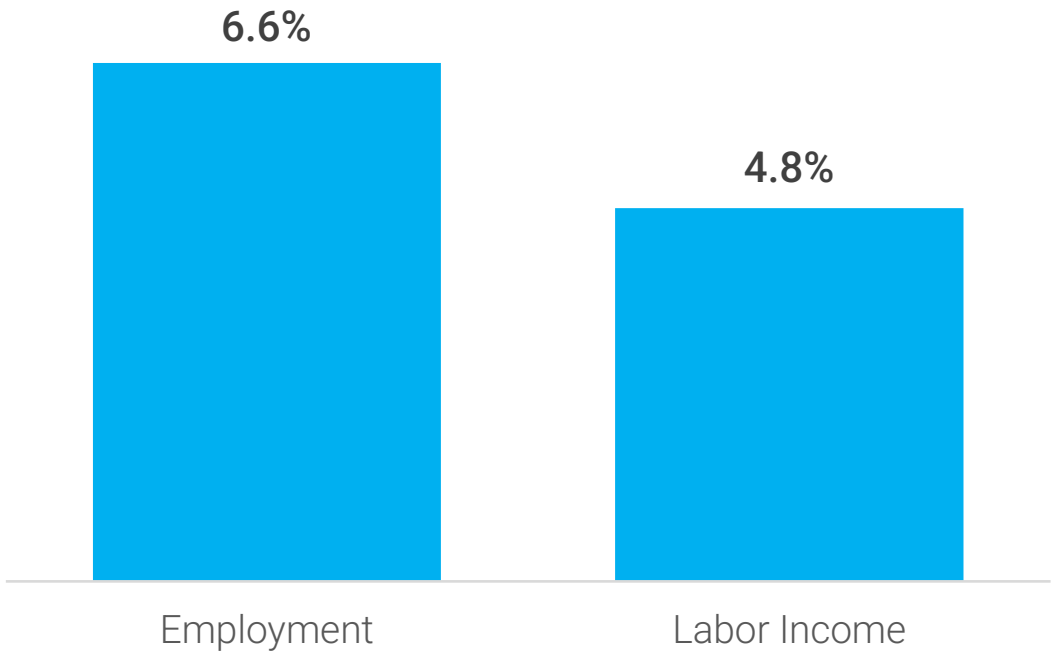
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

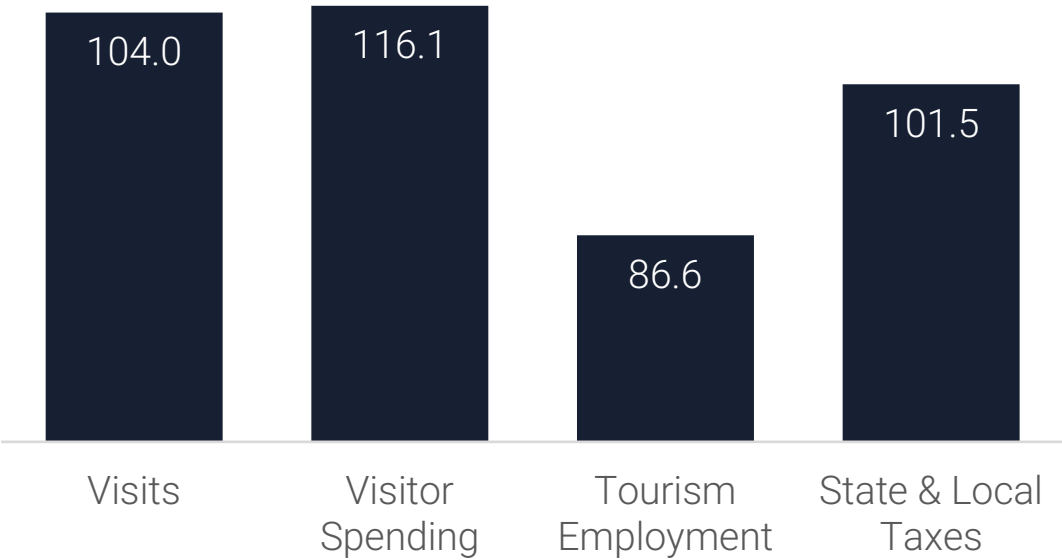


DORCHESTER COUNTY HIGHLIGHTS

Several key indicators in Dorchester County surpassed pre-pandemic (2019) levels in 2022.

Dorchester County key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Dorchester County surpassed 2019 levels by 4%.

Dorchester County visitor volume

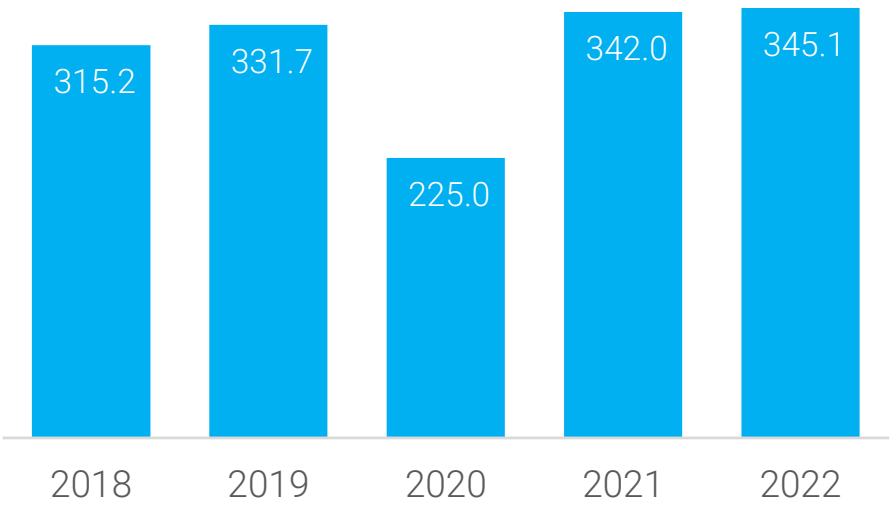
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	150.8	156.9	117.6	161.5	167.6
Overnight	164.5	174.8	107.3	180.5	177.5
Total Visitors	315.2	331.7	225.0	342.0	345.1
Growth rate		5.2%	-32.2%	52.0%	0.9%

Source: D. K. Shifflet, Tourism Economics

Dorchester County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



DORCHESTER COUNTY VISITOR SPENDING

Visitor spending grew 11% in Dorchester County to surpass pre-pandemic levels by 16%.

Dorchester County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$166.1	\$173.6	\$115.9	\$181.3	\$201.5	11.1%	116.1%
Lodging*	\$46.7	\$48.9	\$30.9	\$48.4	\$53.6	10.8%	109.6%
Food & beverage	\$40.4	\$43.1	\$30.6	\$47.9	\$54.5	13.8%	126.4%
Retail	\$22.4	\$23.0	\$17.5	\$22.3	\$24.9	11.9%	108.2%
Recreation	\$20.8	\$20.6	\$12.2	\$18.2	\$21.7	19.1%	105.5%
Transportation**	\$35.8	\$37.9	\$24.7	\$44.6	\$46.7	4.8%	123.2%

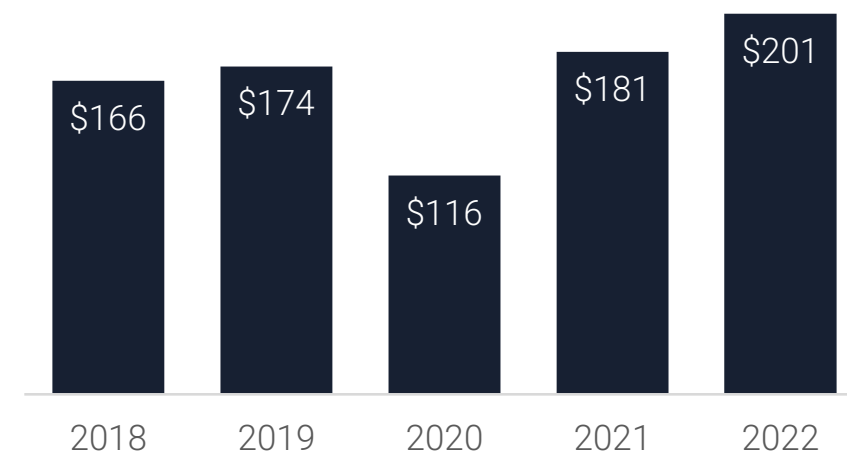
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Dorchester County visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

DORCHESTER COUNTY ECONOMIC IMPACTS

Nearly 2,000 visitor-supported jobs represent 16% of all jobs in Dorchester County.

Visitor impacts in Dorchester County

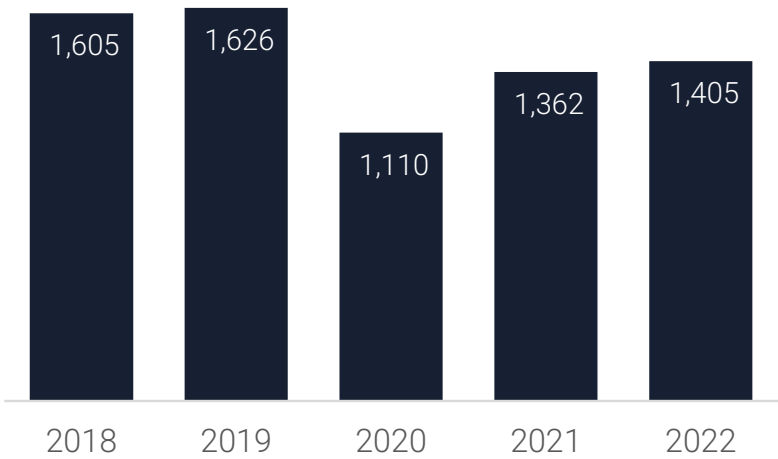
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	1,605	1,626	1,110	1,362	1,405	3.2%	86.4%
Total	2,229	2,262	1,633	1,919	1,959	2.1%	86.6%
Share of State	0.99%	1.00%	0.98%	1.10%	1.05%		
Labor Income							
Direct	\$44.2	\$47.5	\$32.4	\$42.0	\$45.1	7.5%	95.0%
Total	\$75.9	\$81.3	\$59.1	\$71.8	\$75.5	5.2%	92.9%
Share of State	0.74%	0.77%	0.73%	0.82%	0.78%		
Tax revenues							
Federal	\$16.7	\$17.8	\$11.7	\$15.0	\$16.2	7.9%	91.1%
State & Local	\$20.1	\$21.9	\$15.7	\$20.9	\$22.3	6.7%	101.5%
Hotel	\$0.3	\$1.1	\$0.7	\$1.3	\$1.5	13.7%	126.5%
Total	\$37.1	\$40.9	\$28.1	\$37.1	\$39.9	7.4%	97.6%

Source: Tourism Economics

Dorchester County direct employment timeline

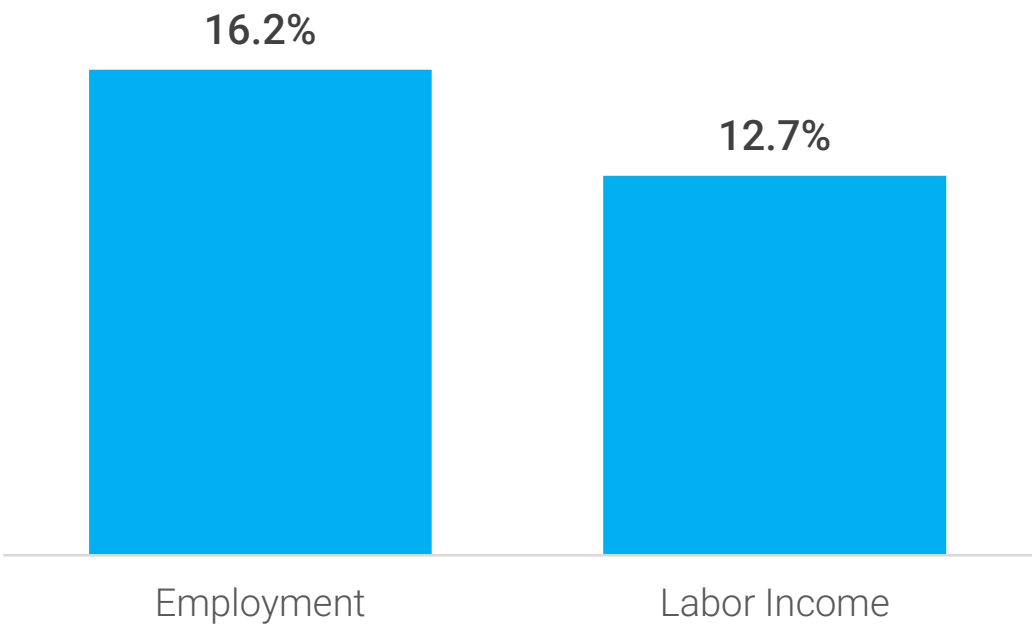
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

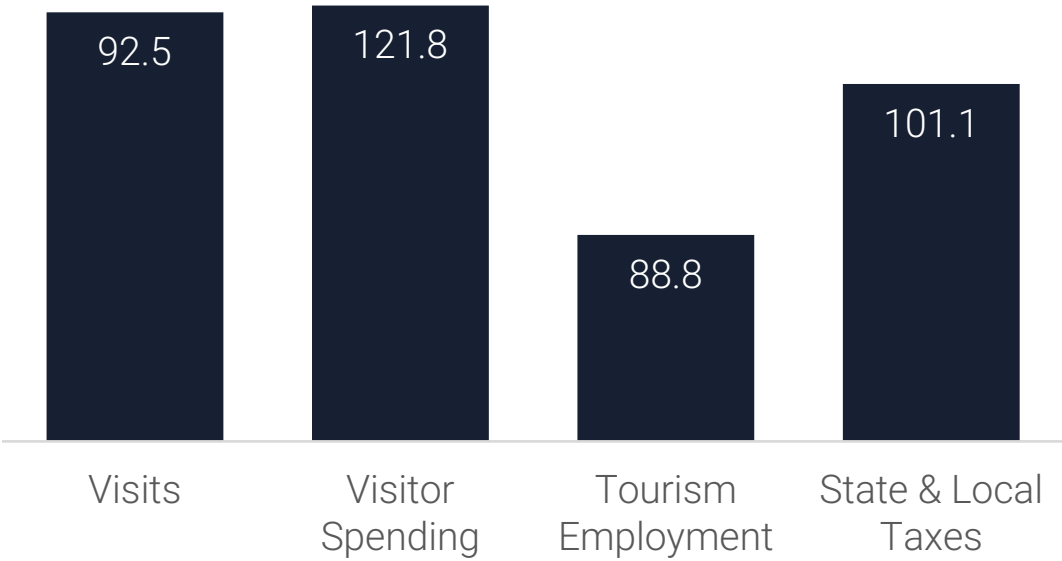


FREDERICK COUNTY HIGHLIGHTS

Visitor spending and tax collections in Frederick County have surpassed pre-pandemic (2019) levels in 2022.

Frederick County key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Frederick County rebounded to 93% of 2019 levels.

Frederick County visitor volume

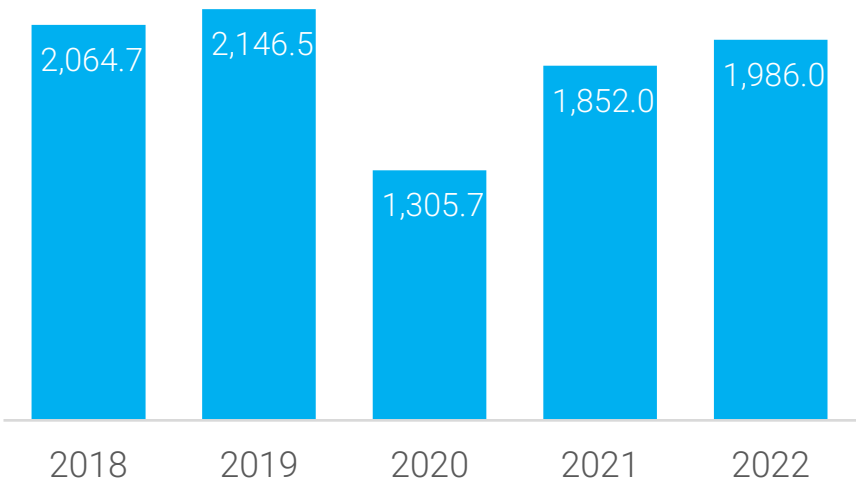
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	1,123.1	1,201.7	735.7	1,088.4	1,208.2
Overnight	941.6	944.8	570.0	763.5	777.8
Total Visitors	2,064.7	2,146.5	1,305.7	1,852.0	1,986.0
Growth rate		4.0%	-39.2%	41.8%	7.2%

Source: D. K. Shifflet, Tourism Economics

Frederick County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



FREDERICK COUNTY VISITOR SPENDING

Visitor spending grew 12% in Frederick County to surpass pre-pandemic levels.

Frederick County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$428.6	\$425.6	\$325.1	\$461.4	\$518.4	12.3%	121.8%
Lodging*	\$68.3	\$67.9	\$48.3	\$70.7	\$81.8	15.7%	120.6%
Food & beverage	\$121.3	\$125.7	\$101.3	\$134.2	\$149.9	11.7%	119.3%
Retail	\$64.0	\$60.7	\$51.8	\$63.6	\$66.8	5.0%	110.2%
Recreation	\$66.0	\$64.1	\$42.1	\$59.6	\$72.4	21.5%	112.8%
Transportation**	\$109.1	\$107.3	\$81.5	\$133.4	\$147.5	10.6%	137.5%

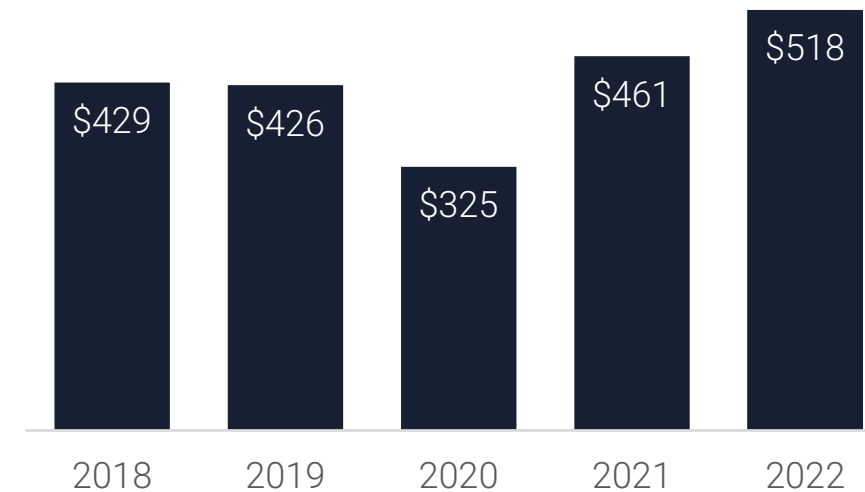
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Frederick County visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

FREDERICK COUNTY ECONOMIC IMPACTS

More than 6,000 visitor-supported jobs represent 5.9% of all jobs in Frederick County.

Visitor impacts in Frederick County

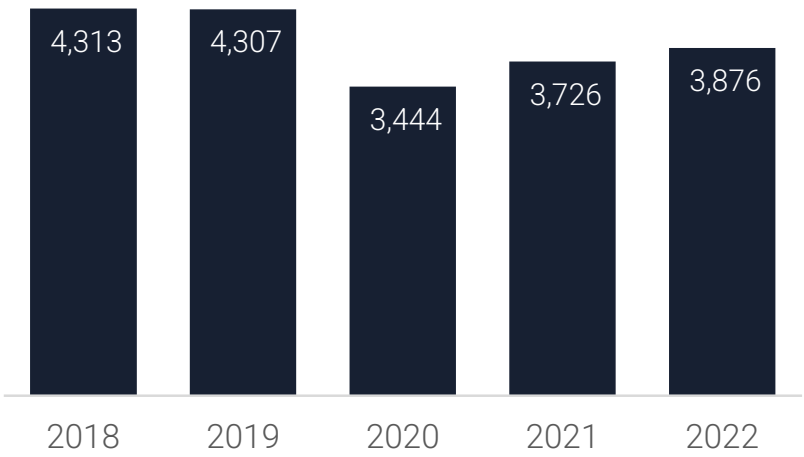
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	4,313	4,307	3,444	3,726	3,876	4.0%	90.0%
Total	6,881	6,887	5,653	5,913	6,115	3.4%	88.8%
Share of State	3.04%	3.04%	3.41%	3.40%	3.26%		
Labor Income							
Direct	\$141.0	\$144.8	\$117.8	\$133.0	\$145.4	9.3%	100.4%
Total	\$277.4	\$285.3	\$239.2	\$257.5	\$276.1	7.2%	96.8%
Share of State	2.69%	2.69%	2.95%	2.95%	2.85%		
Tax revenues							
Federal	\$57.5	\$58.7	\$44.4	\$50.7	\$55.7	9.9%	94.9%
State & Local	\$62.6	\$63.2	\$49.7	\$59.1	\$63.9	8.2%	101.1%
Hotel	\$2.5	\$2.5	\$1.4	\$2.2	\$2.6	19.1%	103.1%
Total	\$122.5	\$124.5	\$95.5	\$111.9	\$122.2	9.2%	98.2%

Source: Tourism Economics

Frederick County direct employment timeline

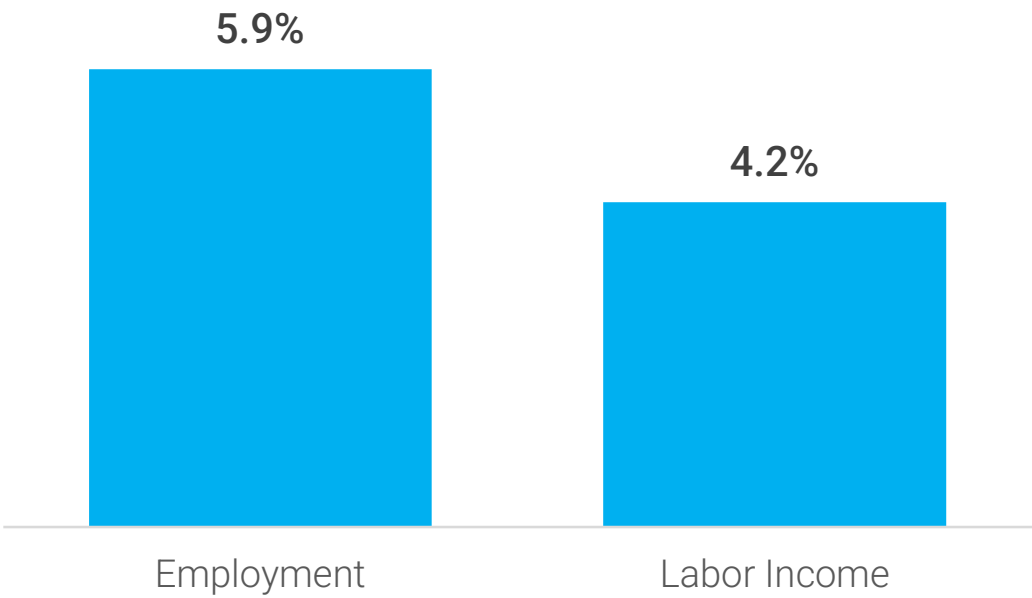
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



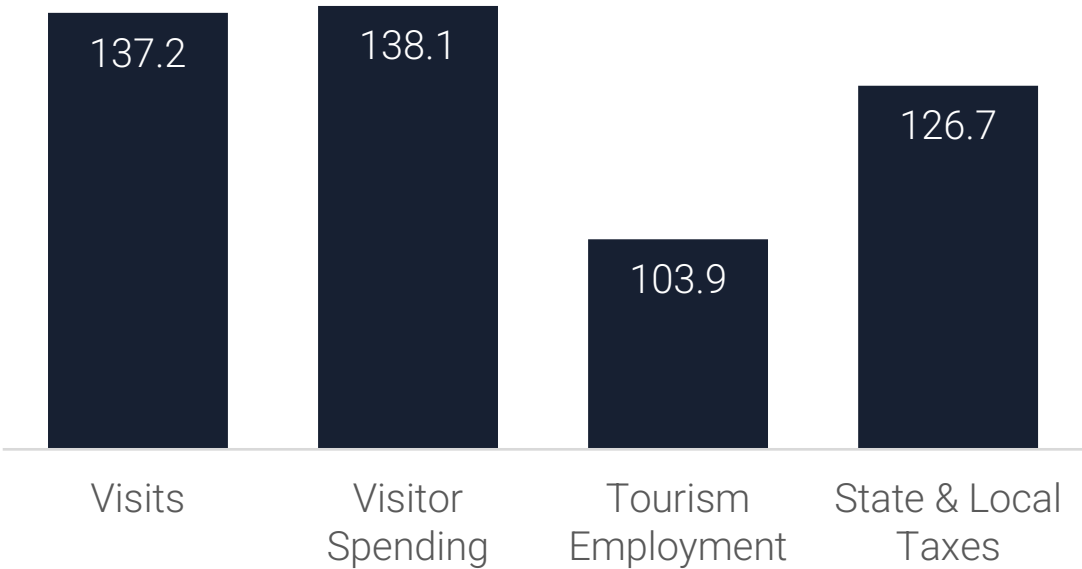
Source: BLS, Tourism Economics



GARRETT COUNTY HIGHLIGHTS

All key indicators in Garrett County have surpassed pre-pandemic (2019) levels in 2022.

Garrett County key indicators
Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Garrett County surpassed 2019 levels by more than a third.

Garrett County visitor volume

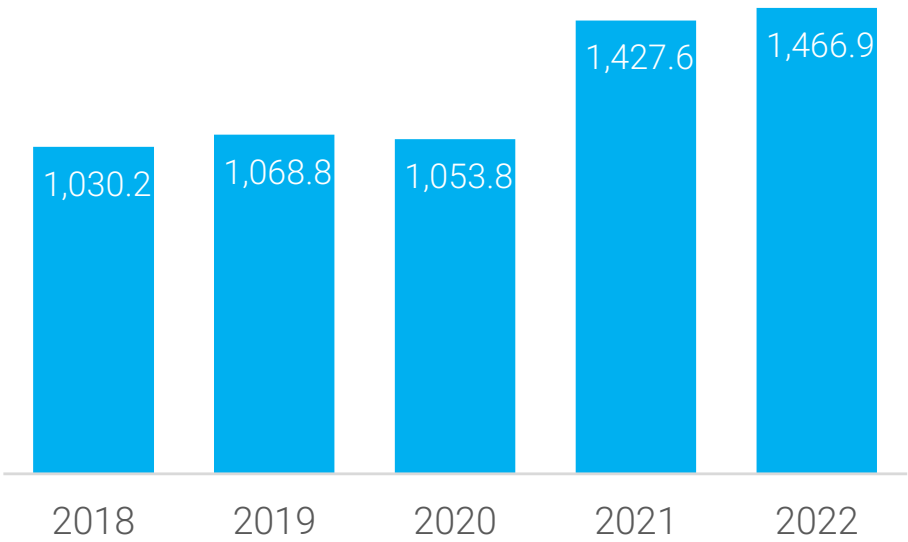
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	538.6	559.1	468.1	659.5	741.9
Overnight	491.6	509.7	585.7	768.1	724.9
Total Visitors	1,030.2	1,068.8	1,053.8	1,427.6	1,466.9
Growth rate		3.8%	-1.4%	35.5%	2.7%

Source: D. K. Shifflet, Tourism Economics

Garrett County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



GARRETT COUNTY VISITOR SPENDING

Visitor spending grew 3% in Garrett County as spending continued to grow in the county.

Garrett County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$355.7	\$361.7	\$386.7	\$485.5	\$499.6	2.9%	138.1%
Lodging*	\$100.4	\$103.6	\$117.1	\$148.8	\$152.5	2.5%	147.2%
Food & beverage	\$70.9	\$72.1	\$78.7	\$92.1	\$90.8	-1.4%	125.9%
Retail	\$40.2	\$40.4	\$47.4	\$52.4	\$54.2	3.5%	134.3%
Recreation	\$67.5	\$68.1	\$71.8	\$94.5	\$98.2	3.9%	144.3%
Transportation**	\$76.6	\$77.5	\$71.8	\$97.6	\$103.9	6.4%	134.0%

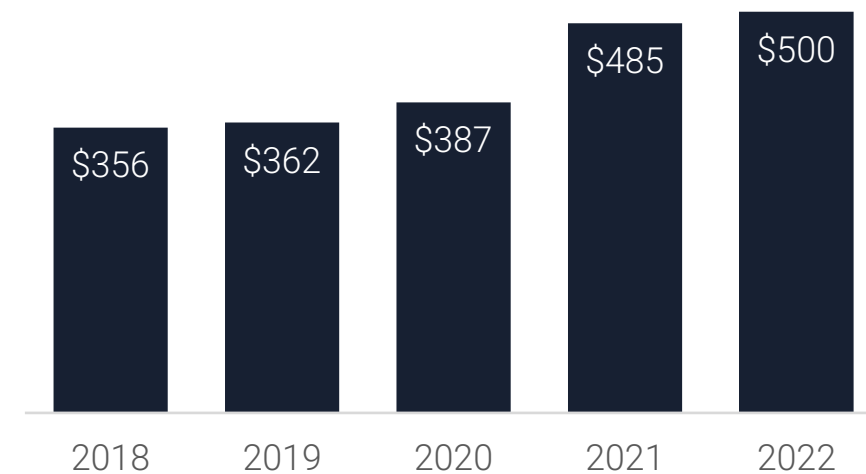
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Garrett County visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

GARRETT COUNTY ECONOMIC IMPACTS

More than 2,700 visitor-supported jobs represent 24% of all jobs in Garrett County.

Visitor impacts in Garrett County

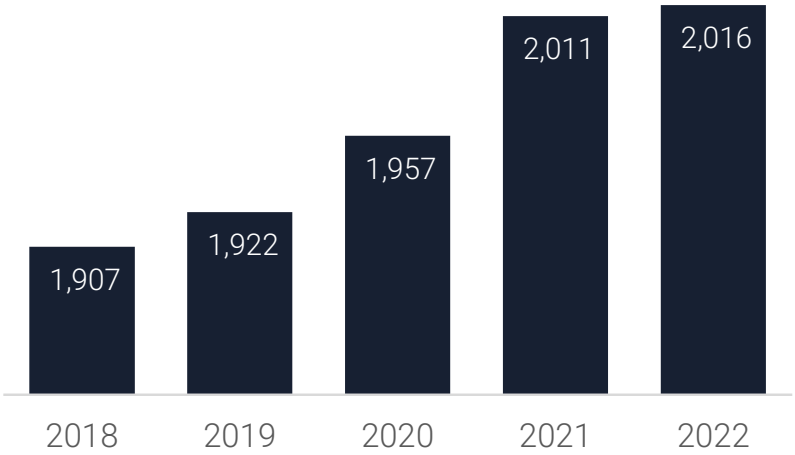
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	1,907	1,922	1,957	2,011	2,016	0.2%	104.9%
Total	2,610	2,634	2,769	2,759	2,737	-0.8%	103.9%
Share of State	1.15%	1.16%	1.67%	1.59%	1.46%		
Labor Income							
Direct	\$54.3	\$55.9	\$60.6	\$64.6	\$66.0	2.2%	118.0%
Total	\$90.6	\$93.5	\$104.0	\$105.9	\$106.1	0.1%	113.5%
Share of State	0.88%	0.88%	1.28%	1.21%	1.10%		
Tax revenues							
Federal	\$23.0	\$23.6	\$24.2	\$25.6	\$26.1	1.8%	110.6%
State & Local	\$45.3	\$46.3	\$54.7	\$59.4	\$58.7	-1.3%	126.7%
Hotel	\$3.1	\$3.2	\$5.3	\$7.4	\$7.0	-5.7%	221.7%
Total	\$71.4	\$73.1	\$84.2	\$92.5	\$91.7	-0.8%	125.6%

Source: Tourism Economics

Garrett County direct employment timeline

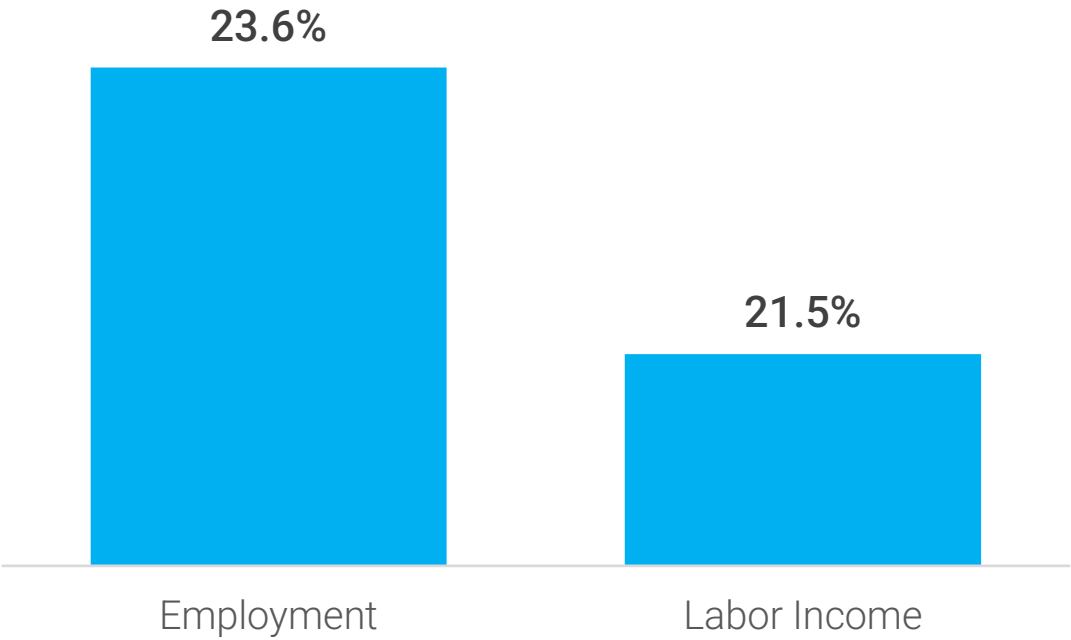
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



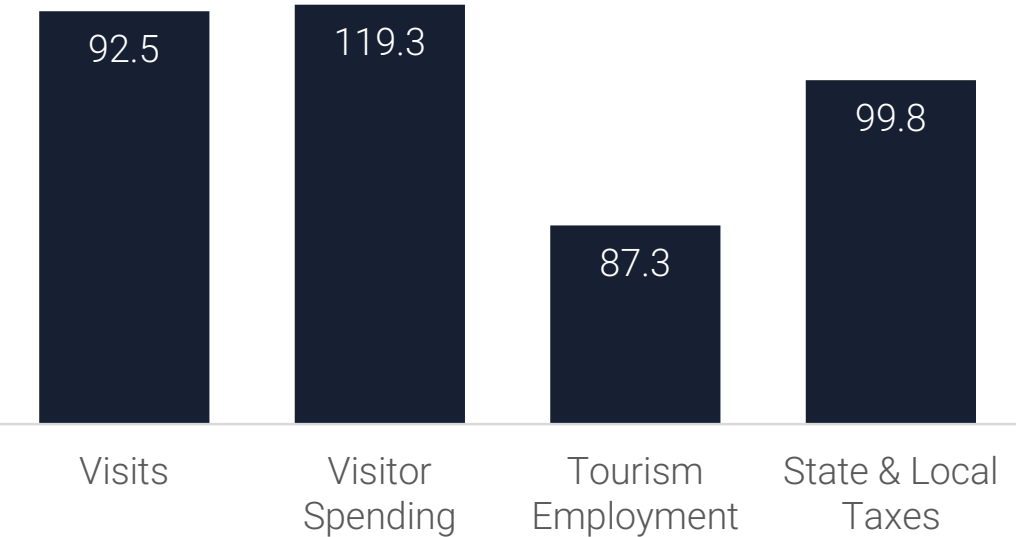
Source: BLS, Tourism Economics



HARFORD COUNTY HIGHLIGHTS

Visitor spending in Harford County has surpassed pre-pandemic (2019) levels in 2022.

Harford County key indicators
Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Harford County rebounded to 92% of 2019 levels.

Harford County visitor volume

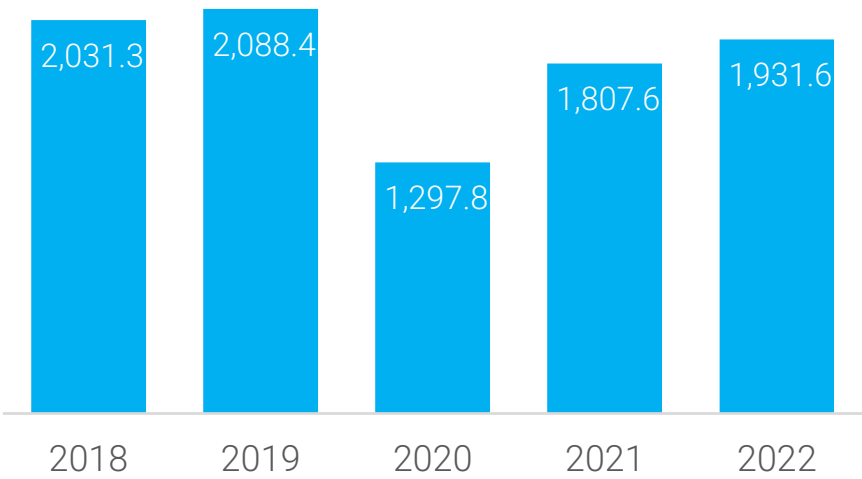
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	1,049.9	1,094.8	713.0	1,040.5	1,134.5
Overnight	981.4	993.6	584.8	767.1	797.0
Total Visitors	2,031.3	2,088.4	1,297.8	1,807.6	1,931.6
Growth rate		2.8%	-37.9%	39.3%	6.9%

Source: D. K. Shifflet, Tourism Economics

Harford County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



HARFORD COUNTY VISITOR SPENDING

Visitor spending grew 39% in Harford County in 2022.

Harford County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$394.5	\$401.5	\$313.5	\$434.2	\$479.1	10.3%	119.3%
Lodging*	\$69.7	\$71.3	\$51.5	\$73.9	\$86.1	16.5%	120.8%
Food & beverage	\$116.7	\$120.7	\$101.5	\$131.0	\$142.8	9.0%	118.4%
Retail	\$57.8	\$57.7	\$51.2	\$64.0	\$70.7	10.6%	122.7%
Recreation	\$73.9	\$73.3	\$46.8	\$66.0	\$73.9	12.0%	100.8%
Transportation**	\$76.5	\$78.5	\$62.6	\$99.3	\$105.5	6.2%	134.3%

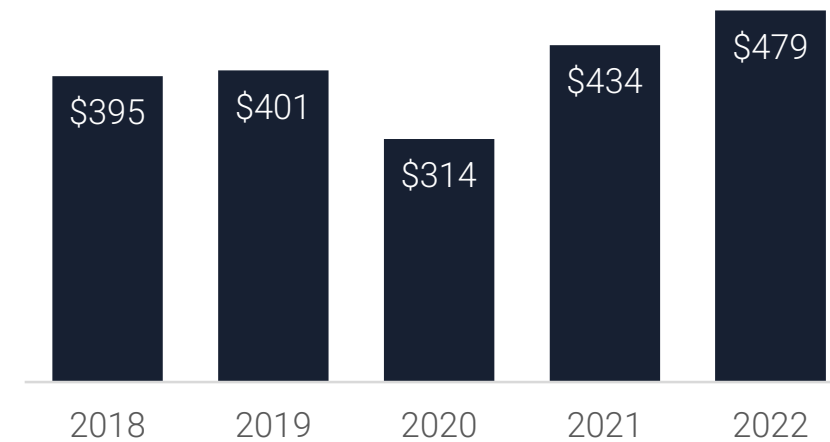
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Harford County visitor spending

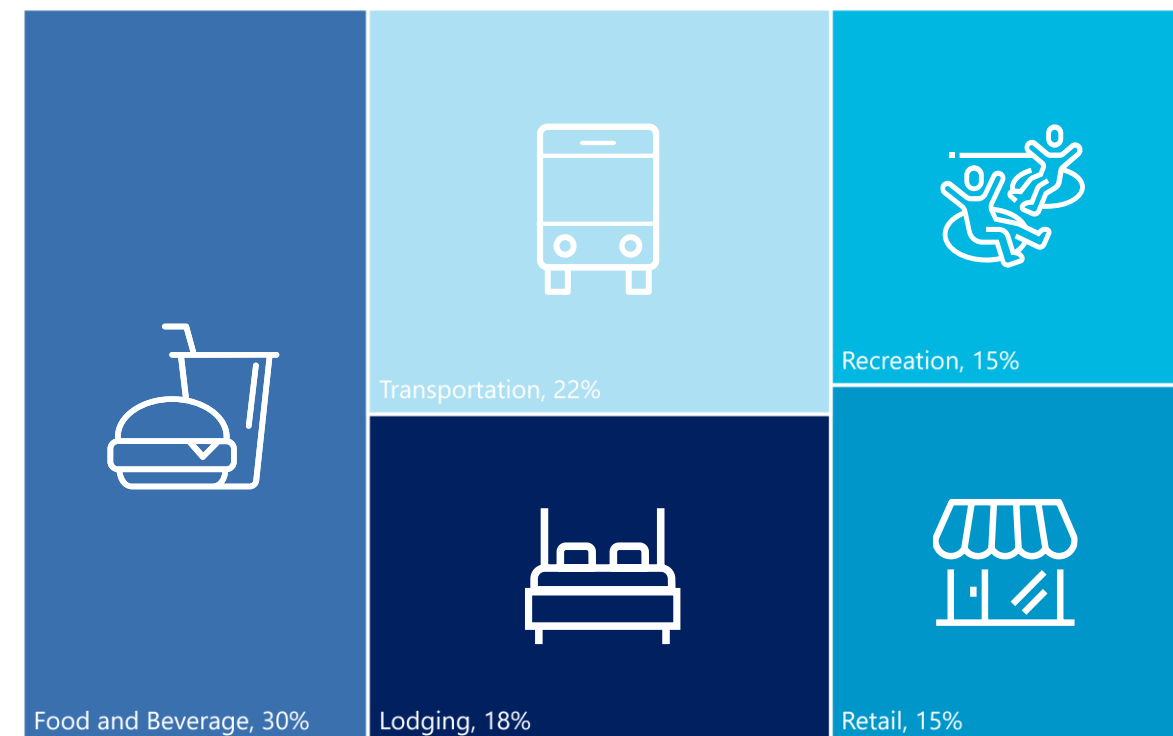
Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

HARFORD COUNTY ECONOMIC IMPACTS

More than 6,500 visitor-supported jobs represent 7.1% of all jobs in Harford County.

Visitor impacts in Harford County

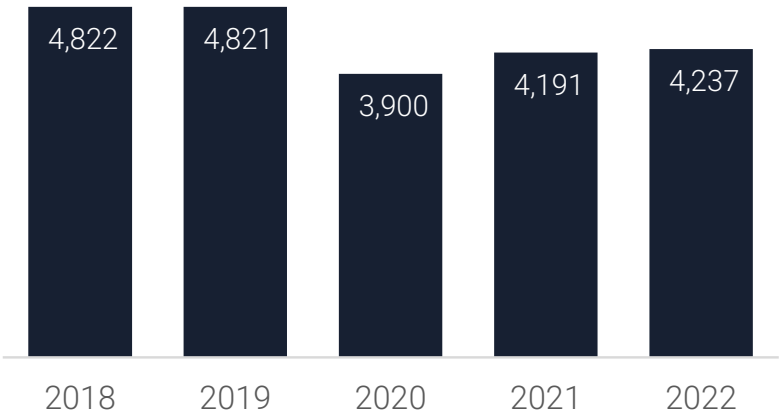
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	4,822	4,821	3,900	4,191	4,237	1.1%	87.9%
Total	7,537	7,543	6,271	6,524	6,583	0.9%	87.3%
Share of State	3.33%	3.33%	3.78%	3.76%	3.51%		
Labor Income							
Direct	\$132.7	\$138.6	\$119.2	\$132.0	\$137.1	3.9%	98.9%
Total	\$267.3	\$278.7	\$243.5	\$258.1	\$266.2	3.1%	95.5%
Share of State	2.59%	2.62%	3.01%	2.96%	2.75%		
Tax revenues							
Federal	\$55.0	\$57.1	\$44.8	\$50.4	\$53.4	6.0%	93.5%
State & Local	\$59.3	\$61.0	\$49.1	\$57.3	\$60.9	6.4%	99.8%
Hotel	\$3.0	\$3.2	\$1.9	\$2.9	\$3.4	17.4%	108.2%
Total	\$117.4	\$121.3	\$95.8	\$110.6	\$117.7	6.5%	97.1%

Source: Tourism Economics

Harford County direct employment timeline

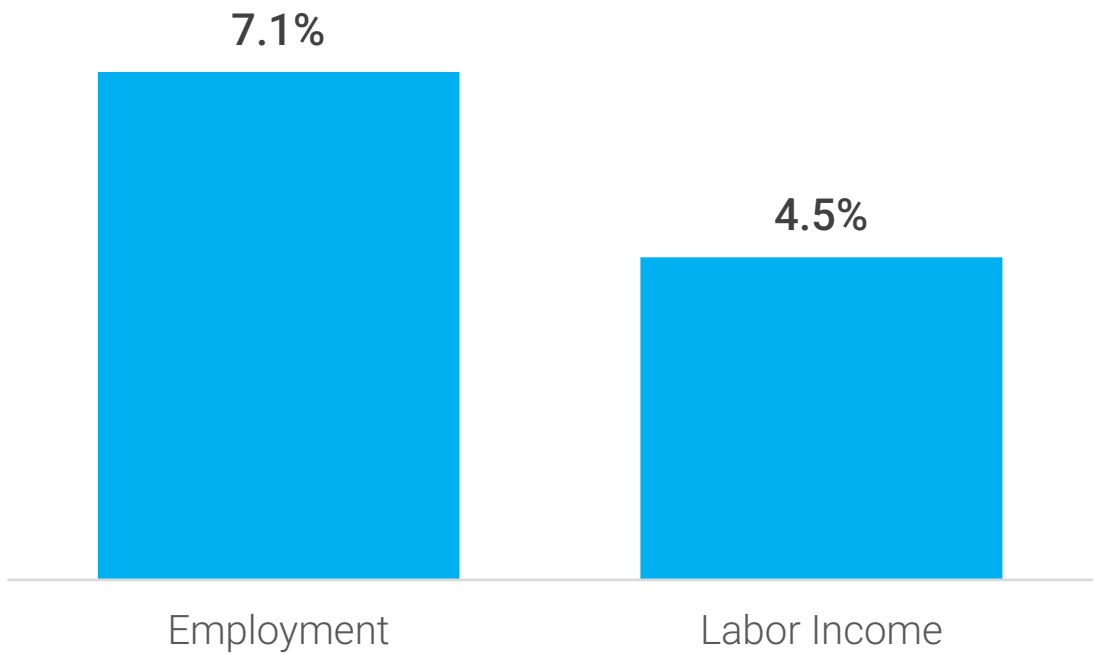
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



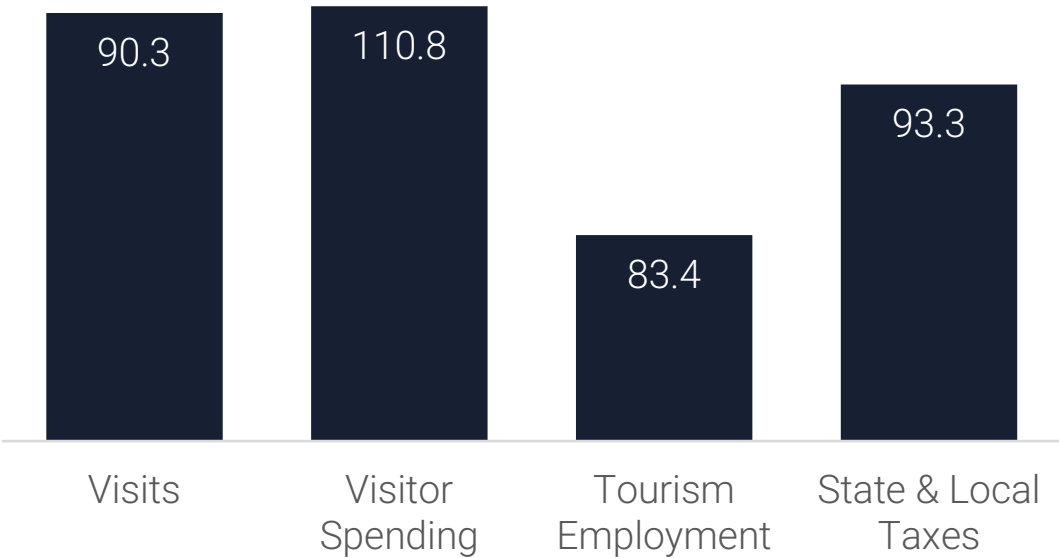
Source: BLS, Tourism Economics



HOWARD COUNTY HIGHLIGHTS

Visitor spending in Howard County surpassed pre-pandemic (2019) levels for the first time in 2022.

Howard County key indicators
Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Howard County rebounded to 90% of 2019 levels.

Howard County visitor volume

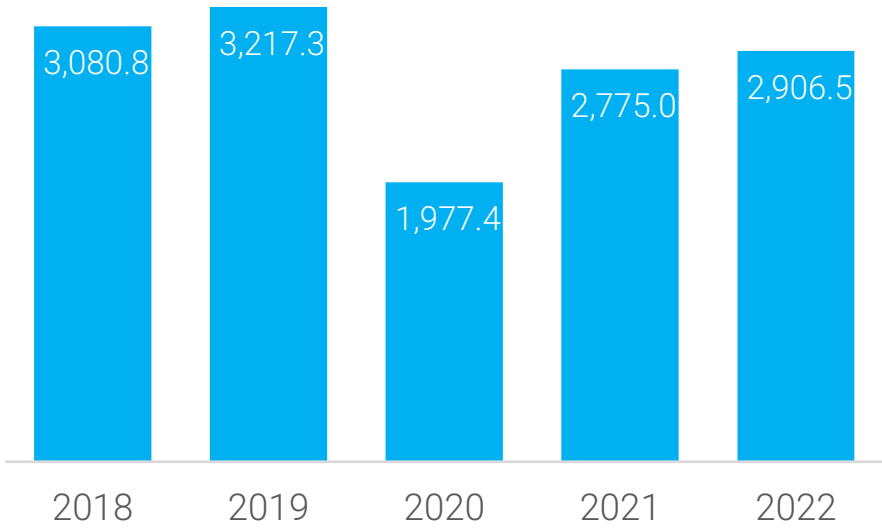
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	1,801.5	1,897.4	1,184.2	1,735.2	1,891.0
Overnight	1,279.3	1,319.9	793.1	1,039.8	1,015.5
Total Visitors	3,080.8	3,217.3	1,977.4	2,775.0	2,906.5
Growth rate		4.4%	-38.5%	40.3%	4.7%

Source: D. K. Shifflet, Tourism Economics

Howard County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



HOWARD COUNTY VISITOR SPENDING

Visitor spending grew 18% in Howard County in 2022 to reach 110% of pre-pandemic levels.

Howard County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$651.8	\$666.7	\$433.0	\$628.3	\$738.5	17.5%	110.8%
Lodging*	\$109.7	\$112.6	\$66.3	\$100.5	\$131.3	30.6%	116.6%
Food & beverage	\$178.0	\$187.0	\$134.5	\$181.7	\$203.7	12.1%	108.9%
Retail	\$120.6	\$115.8	\$79.8	\$99.5	\$108.1	8.6%	93.3%
Recreation	\$105.6	\$109.6	\$60.2	\$91.6	\$111.0	21.2%	101.3%
Transportation**	\$138.0	\$141.8	\$92.1	\$154.9	\$184.5	19.1%	130.1%

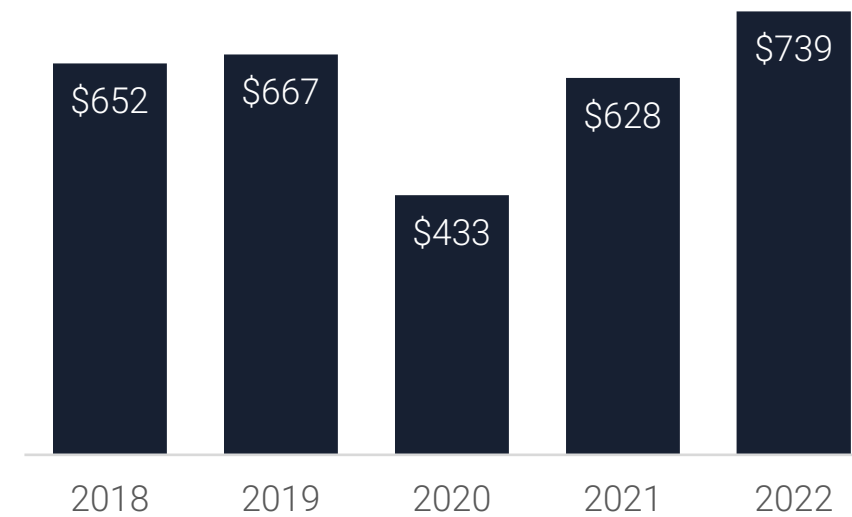
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Howard County visitor spending

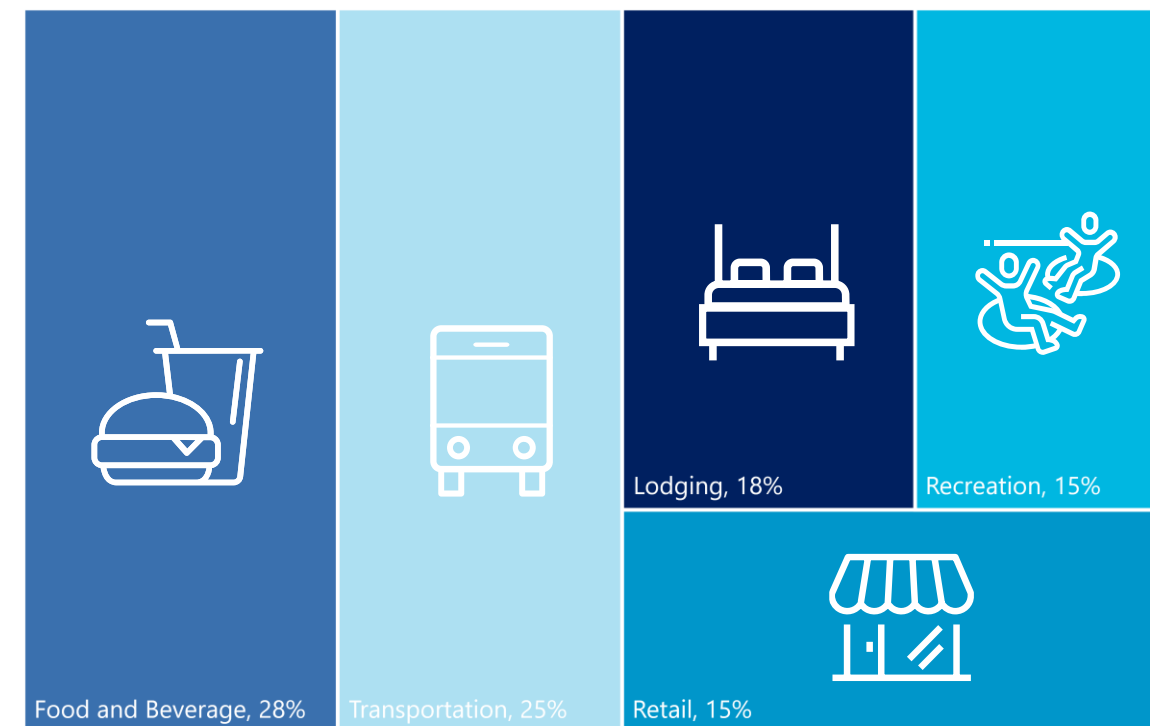
Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

HOWARD COUNTY ECONOMIC IMPACTS

More than 9,000 visitor-supported jobs represent 5.7% of all jobs in Howard County.

Visitor impacts in Howard County

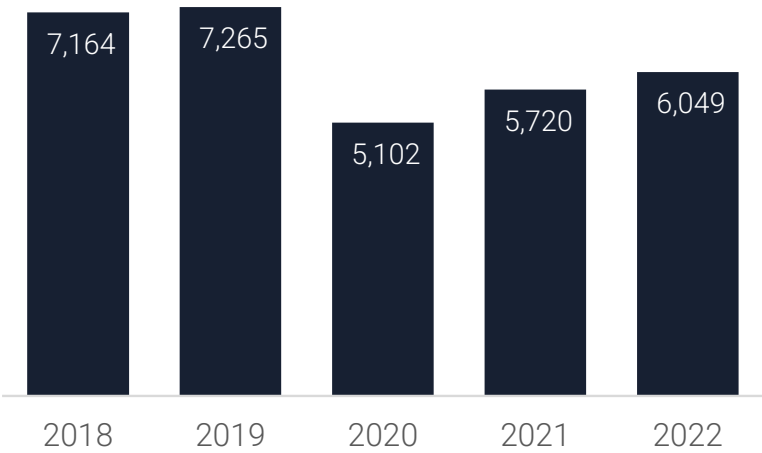
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	7,164	7,265	5,102	5,720	6,049	5.8%	83.3%
Total	11,046	11,192	8,266	8,906	9,331	4.8%	83.4%
Share of State	4.88%	4.94%	4.98%	5.13%	4.98%		
Labor Income							
Direct	\$210.6	\$224.6	\$160.4	\$193.1	\$210.3	8.9%	93.6%
Total	\$398.2	\$422.5	\$319.6	\$362.4	\$387.2	6.8%	91.6%
Share of State	3.86%	3.98%	3.95%	4.15%	4.00%		
Tax revenues							
Federal	\$83.2	\$87.7	\$59.2	\$71.0	\$78.3	10.3%	89.3%
State & Local	\$95.7	\$99.2	\$67.7	\$82.9	\$92.6	11.6%	93.3%
Hotel	\$5.4	\$5.7	\$2.0	\$4.0	\$5.1	29.0%	89.9%
Total	\$184.2	\$192.6	\$129.0	\$157.9	\$176.0	11.4%	91.4%

Source: Tourism Economics

Howard County direct employment timeline

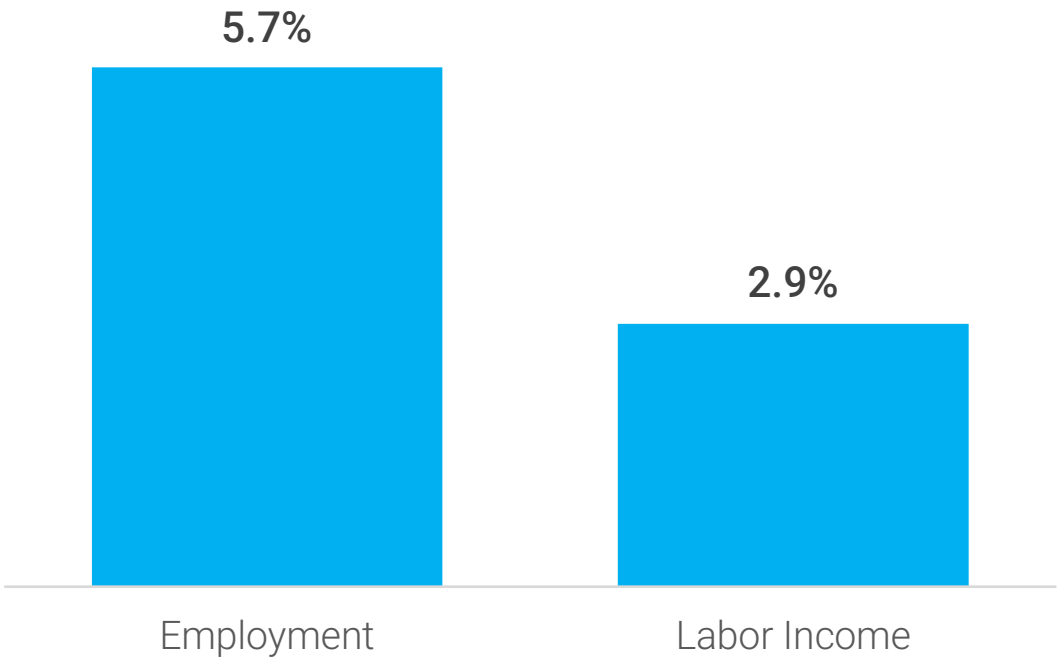
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



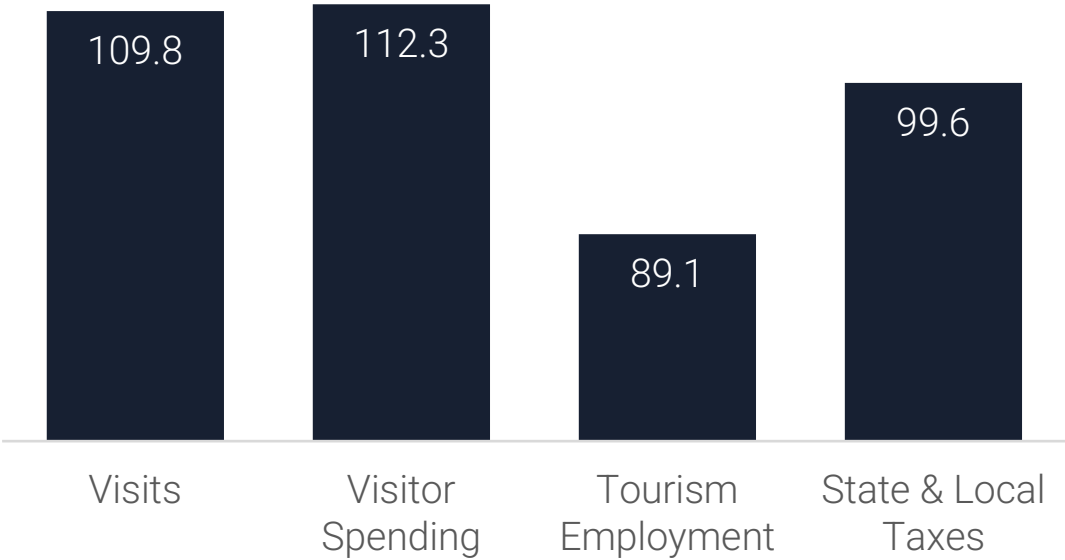
Source: BLS, Tourism Economics



KENT COUNTY HIGHLIGHTS

Several key indicators in Kent County are near or have surpassed pre-pandemic (2019) levels in 2022.

Kent County key indicators
Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Kent County has grown to 109% of 2019 levels.

Kent County visitor volume

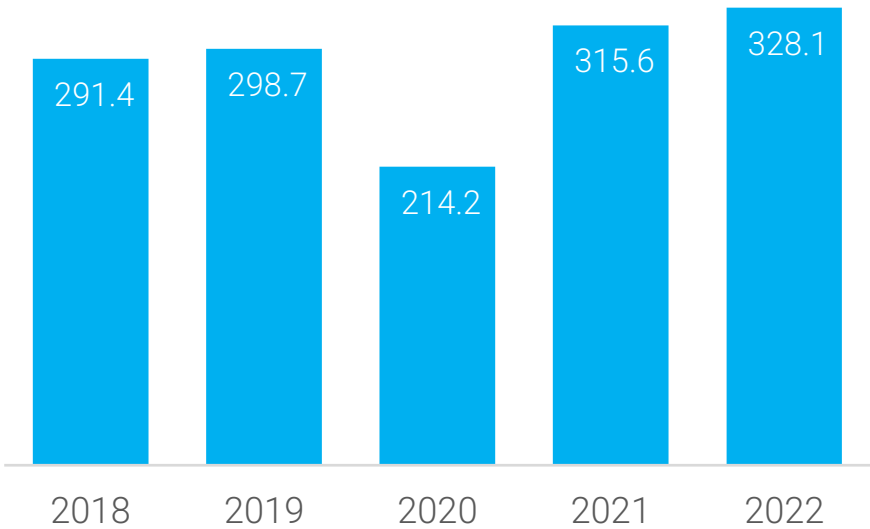
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	193.5	201.9	136.1	206.4	225.3
Overnight	97.9	96.8	78.1	109.1	102.8
Total Visitors	291.4	298.7	214.2	315.6	328.1
Growth rate		2.5%	-28.3%	47.4%	4.0%

Source: D. K. Shifflet, Tourism Economics

Kent County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



KENT COUNTY VISITOR SPENDING

Visitor spending grew 5% in Kent County in 2022, growth of over \$21 million.

Kent County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$63.2	\$63.9	\$46.9	\$68.4	\$71.8	5.0%	112.3%
Lodging*	\$31.1	\$32.4	\$22.8	\$29.5	\$32.7	10.7%	100.9%
Food & beverage	\$10.5	\$10.8	\$8.4	\$13.3	\$12.9	-2.7%	119.6%
Retail	\$5.1	\$4.8	\$4.2	\$6.2	\$6.5	3.3%	134.5%
Recreation	\$9.0	\$8.6	\$6.1	\$9.4	\$9.3	-1.0%	108.1%
Transportation**	\$7.5	\$7.3	\$5.4	\$10.0	\$10.4	4.8%	142.1%

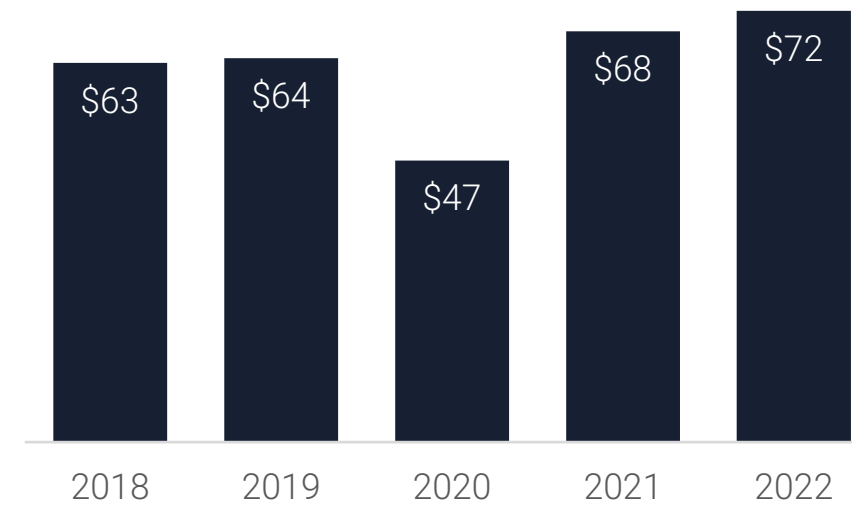
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Kent County visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

KENT COUNTY ECONOMIC IMPACTS

Nearly 640 visitor-supported jobs represent 8.4% of all jobs in Kent County.

Visitor impacts in Kent County

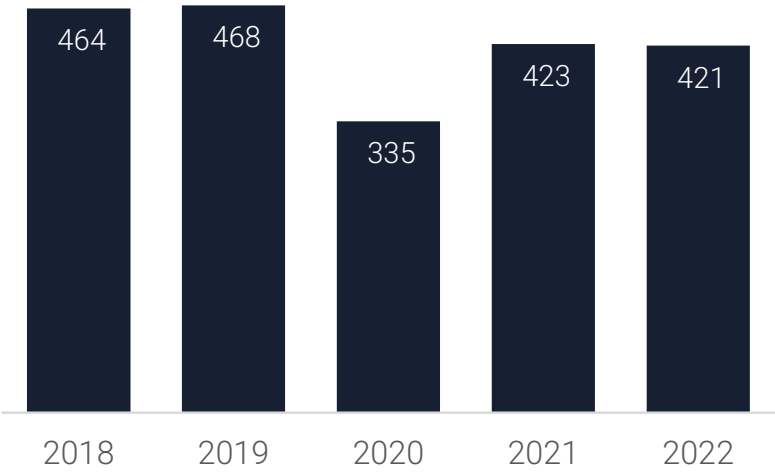
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	464	468	335	423	421	-0.4%	90.1%
Total	707	712	534	639	635	-0.6%	89.1%
Share of State	0.31%	0.31%	0.32%	0.37%	0.34%		
Labor Income							
Direct	\$14.4	\$14.6	\$12.3	\$16.4	\$16.5	0.6%	112.9%
Total	\$27.2	\$27.8	\$24.1	\$29.7	\$29.6	-0.1%	106.7%
Share of State	0.26%	0.26%	0.30%	0.34%	0.31%		
Tax revenues							
Federal	\$6.1	\$6.2	\$4.8	\$6.1	\$6.2	2.3%	101.2%
State & Local	\$8.7	\$8.8	\$7.0	\$8.7	\$8.8	1.0%	99.6%
Hotel	\$0.3	\$0.3	\$0.2	\$0.4	\$0.4	-4.3%	122.4%
Total	\$15.1	\$15.3	\$11.9	\$15.2	\$15.4	1.4%	100.7%

Source: Tourism Economics

Kent County direct employment timeline

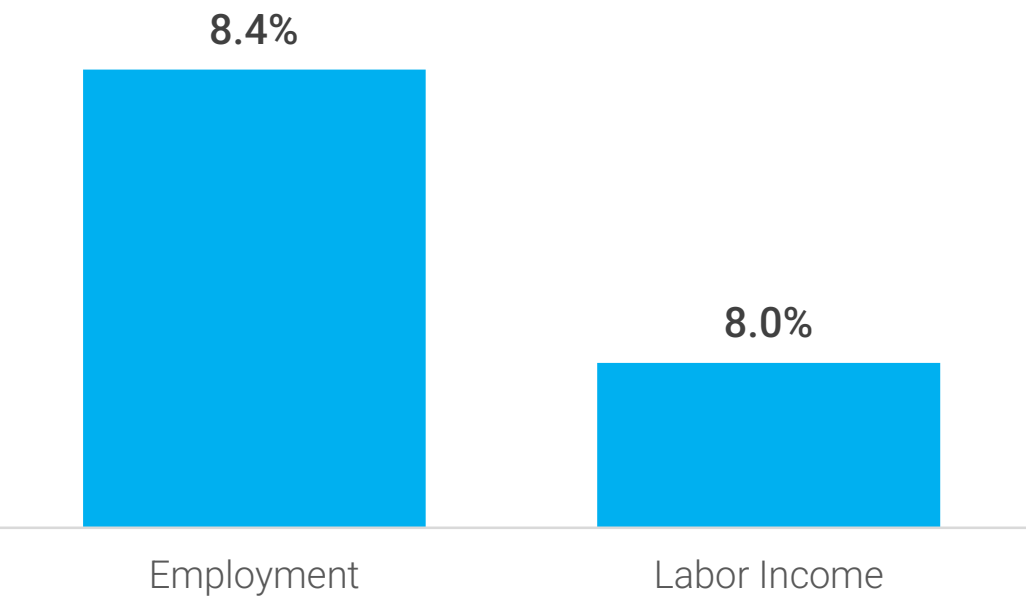
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

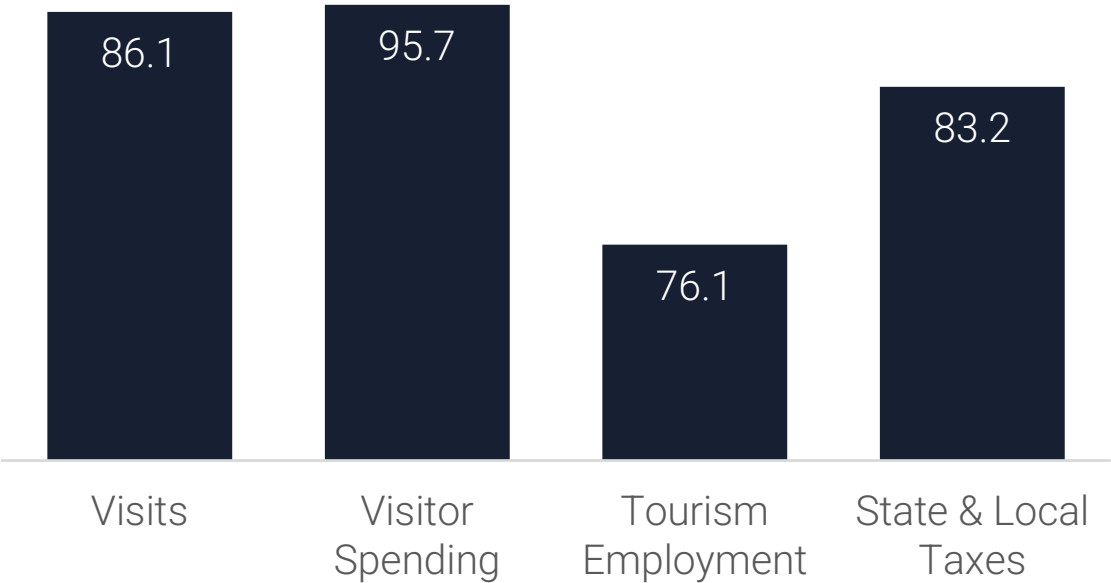


MONTGOMERY COUNTY HIGHLIGHTS

Key indicators in Montgomery County nearly recovered to two-thirds pre-pandemic (2019) levels of visitor spending in 2022.

Montgomery County key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Montgomery County has grown to 86% of 2019 levels.

Montgomery County visitor volume

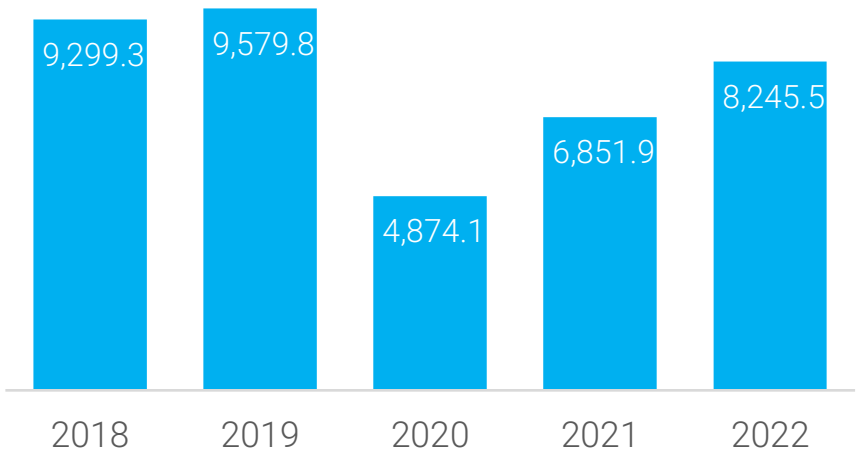
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	5,419.4	5,622.3	3,053.3	4,493.0	5,527.7
Overnight	3,879.9	3,957.5	1,820.8	2,358.9	2,717.8
Total Visitors	9,299.3	9,579.8	4,874.1	6,851.9	8,245.5
Growth rate		3.0%	-49.1%	40.6%	20.3%

Source: D. K. Shifflet, Tourism Economics

Montgomery County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



MONTGOMERY COUNTY VISITOR SPENDING

Visitor spending grew 30% in Montgomery County in 2022.

Montgomery County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$1,938.1	\$1,981.6	\$1,103.5	\$1,463.2	\$1,896.9	29.6%	95.7%
Lodging*	\$349.1	\$355.1	\$143.1	\$201.9	\$306.1	51.6%	86.2%
Food & beverage	\$564.6	\$588.0	\$328.7	\$422.0	\$565.5	34.0%	96.2%
Retail	\$304.1	\$303.0	\$188.0	\$228.7	\$260.0	13.7%	85.8%
Recreation	\$289.9	\$292.9	\$125.3	\$173.4	\$211.0	21.7%	72.0%
Transportation**	\$430.4	\$442.7	\$318.3	\$437.3	\$554.3	26.8%	125.2%

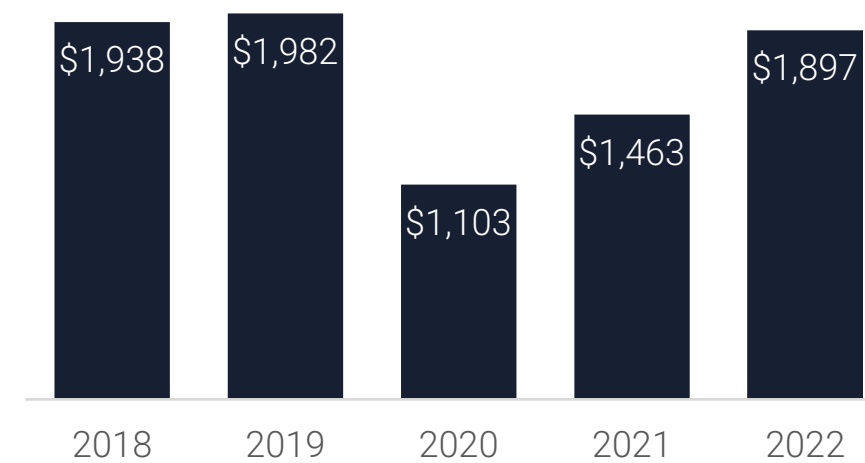
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Montgomery County visitor spending

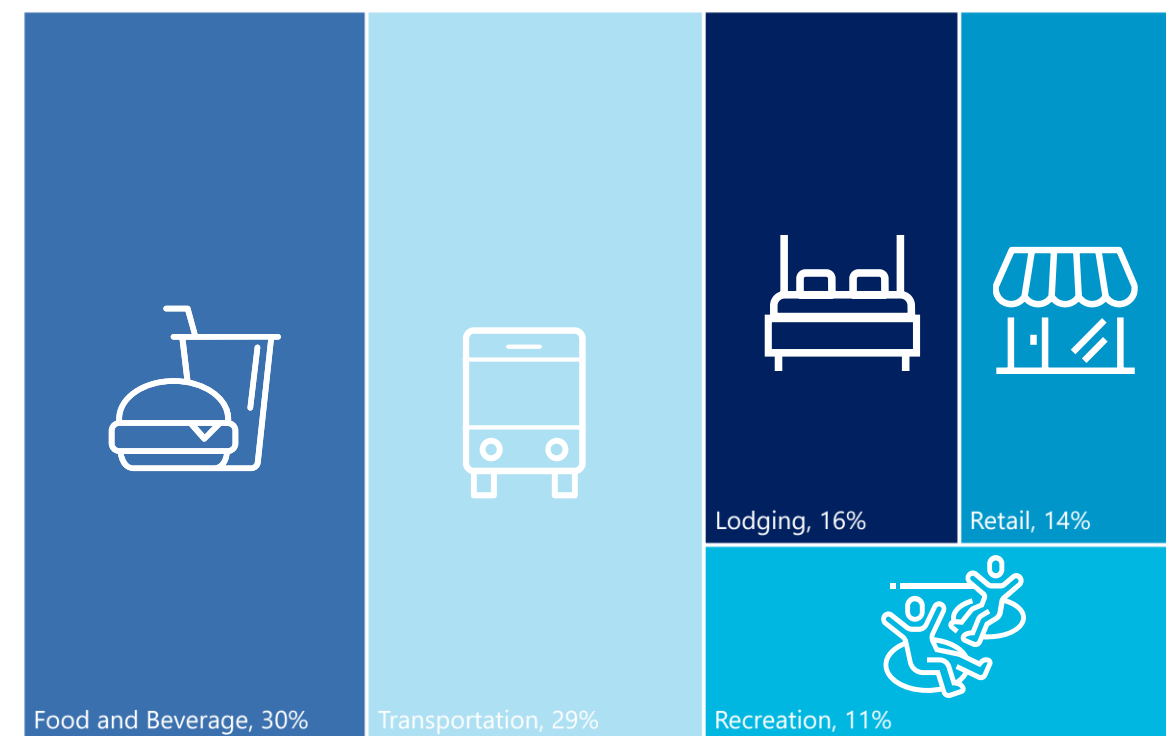
Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

MONTGOMERY COUNTY ECONOMIC IMPACTS

Over 20,000 visitor-supported jobs represent 5% of all jobs in Montgomery County.

Visitor impacts in Montgomery County

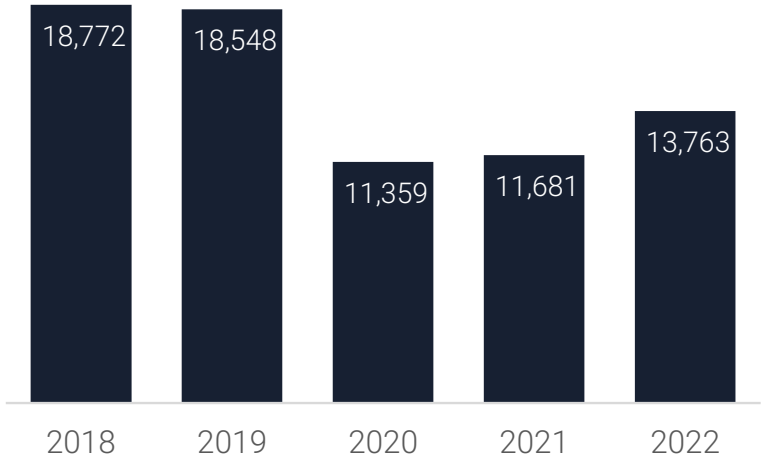
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	18,772	18,548	11,359	11,681	13,763	17.8%	74.2%
Total	29,884	29,626	19,634	19,729	22,534	14.2%	76.1%
Share of State	13.21%	13.08%	11.83%	11.36%	12.03%		
Labor Income							
Direct	\$821.8	\$832.8	\$542.2	\$577.6	\$708.1	22.6%	85.0%
Total	\$1,513.0	\$1,539.9	\$1,080.4	\$1,109.5	\$1,304.2	17.5%	84.7%
Share of State	14.66%	14.50%	13.34%	12.71%	13.47%		
Tax revenues							
Federal	\$305.5	\$310.8	\$193.1	\$210.0	\$254.5	21.2%	81.9%
State & Local	\$299.8	\$308.2	\$181.3	\$204.5	\$256.5	25.4%	83.2%
Hotel	\$21.0	\$21.8	\$7.1	\$10.1	\$17.9	77.4%	82.2%
Total	\$626.3	\$640.8	\$381.5	\$424.6	\$528.9	24.6%	82.5%

Source: Tourism Economics

Montgomery County direct employment timeline

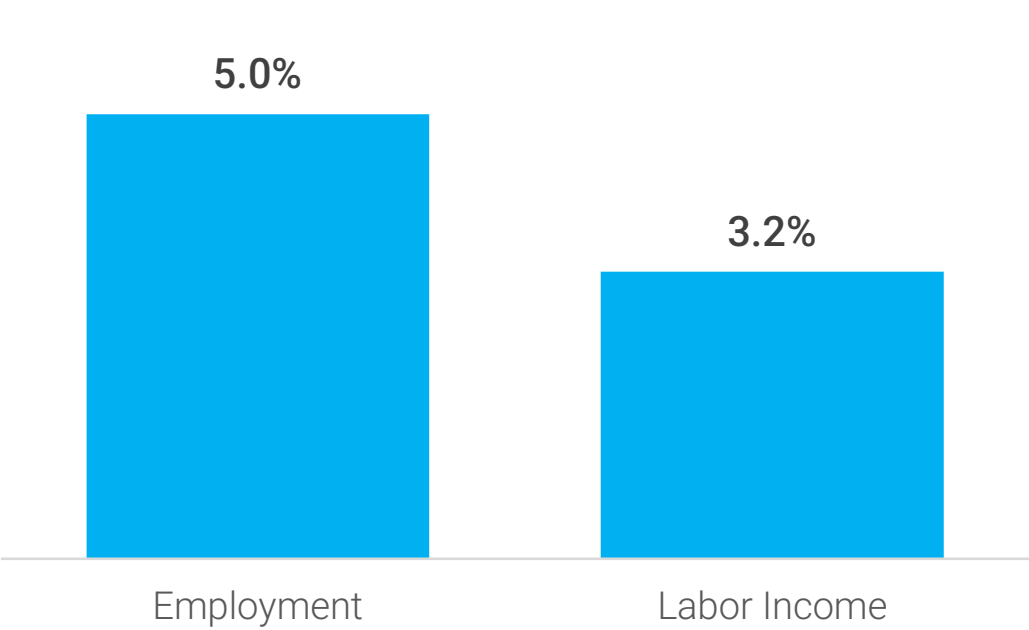
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

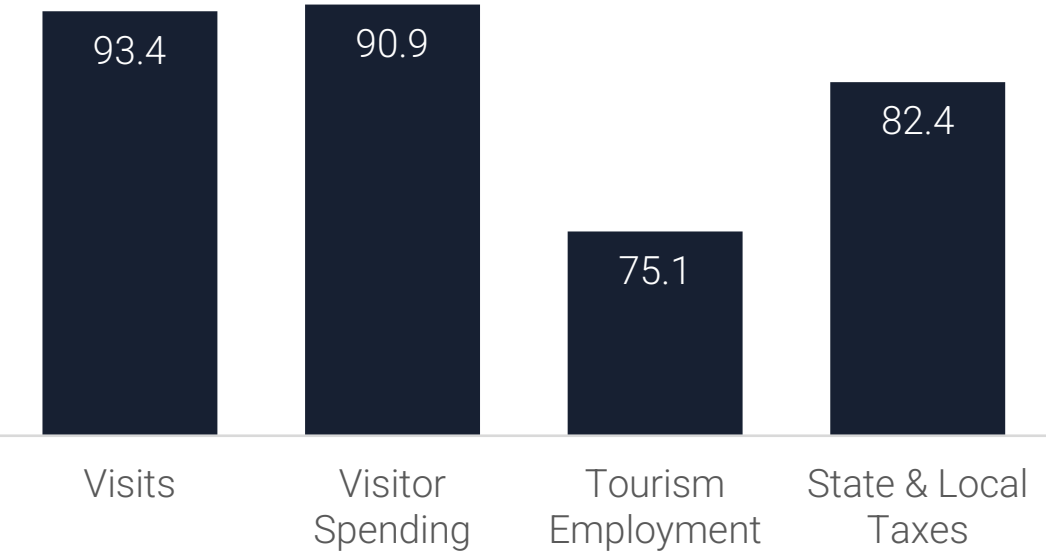


PRINCE GEORGE'S COUNTY HIGHLIGHTS

Led by visitors and visitor spending, all key tourism indicators have recovered to 75% or more of pre-pandemic levels.

Prince George's County key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Prince George's County has rebounded to 93% of 2019 levels.

Prince George's County visitor volume

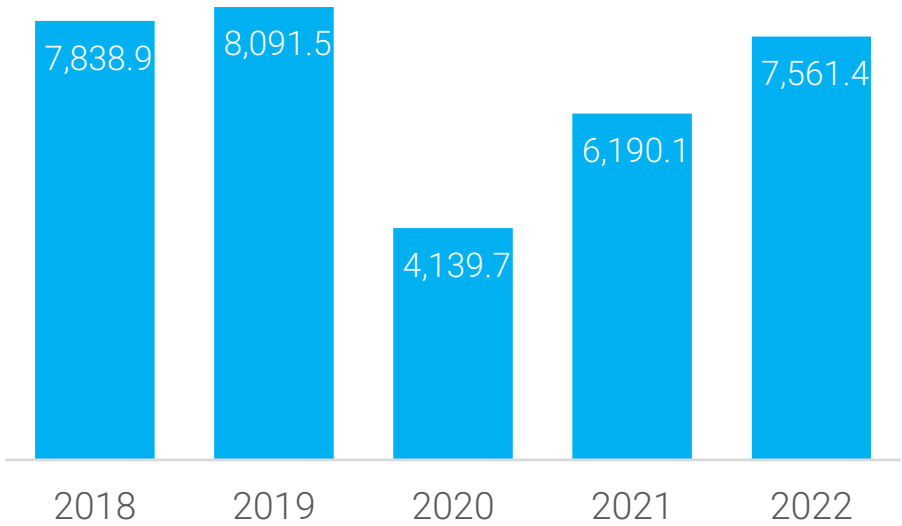
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	3,936.1	4,106.8	2,232.3	3,505.1	4,610.2
Overnight	3,902.8	3,984.8	1,907.4	2,685.0	2,951.2
Total Visitors	7,838.9	8,091.5	4,139.7	6,190.1	7,561.4
Growth rate		3.2%	-48.8%	49.5%	22.2%

Source: D. K. Shifflet, Tourism Economics

Prince George's County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



PRINCE GEORGE'S COUNTY VISITOR SPENDING

Visitor spending grew 26% in Prince George's County in 2022.

Prince George's County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

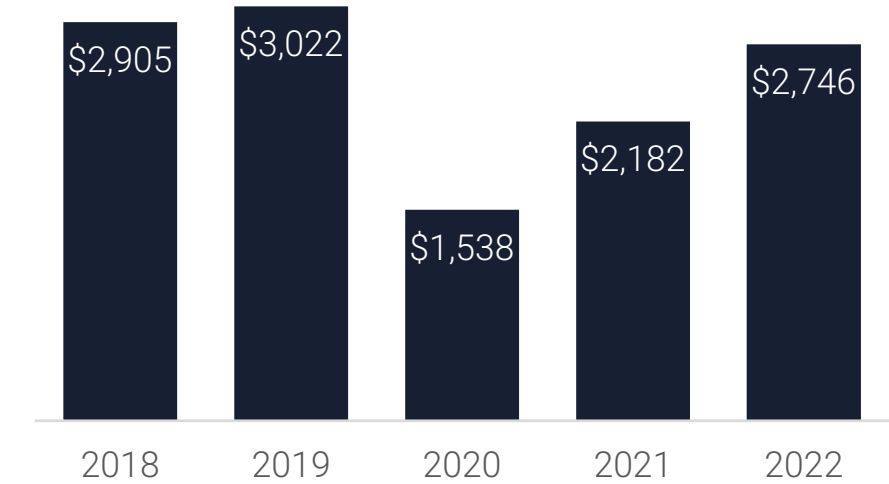
	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$2,904.8	\$3,021.6	\$1,537.9	\$2,181.7	\$2,745.5	25.8%	90.9%
Lodging*	\$566.3	\$591.1	\$233.1	\$358.9	\$540.3	50.5%	91.4%
Food & beverage	\$790.9	\$844.4	\$434.8	\$584.1	\$745.7	27.7%	88.3%
Retail	\$442.3	\$453.7	\$255.9	\$329.3	\$361.1	9.7%	79.6%
Recreation	\$399.8	\$386.6	\$162.1	\$235.7	\$270.2	14.6%	69.9%
Transportation**	\$705.5	\$745.9	\$452.0	\$673.7	\$828.2	22.9%	111.0%

* Lodging includes 2nd home spending
** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Prince George's County visitor spending

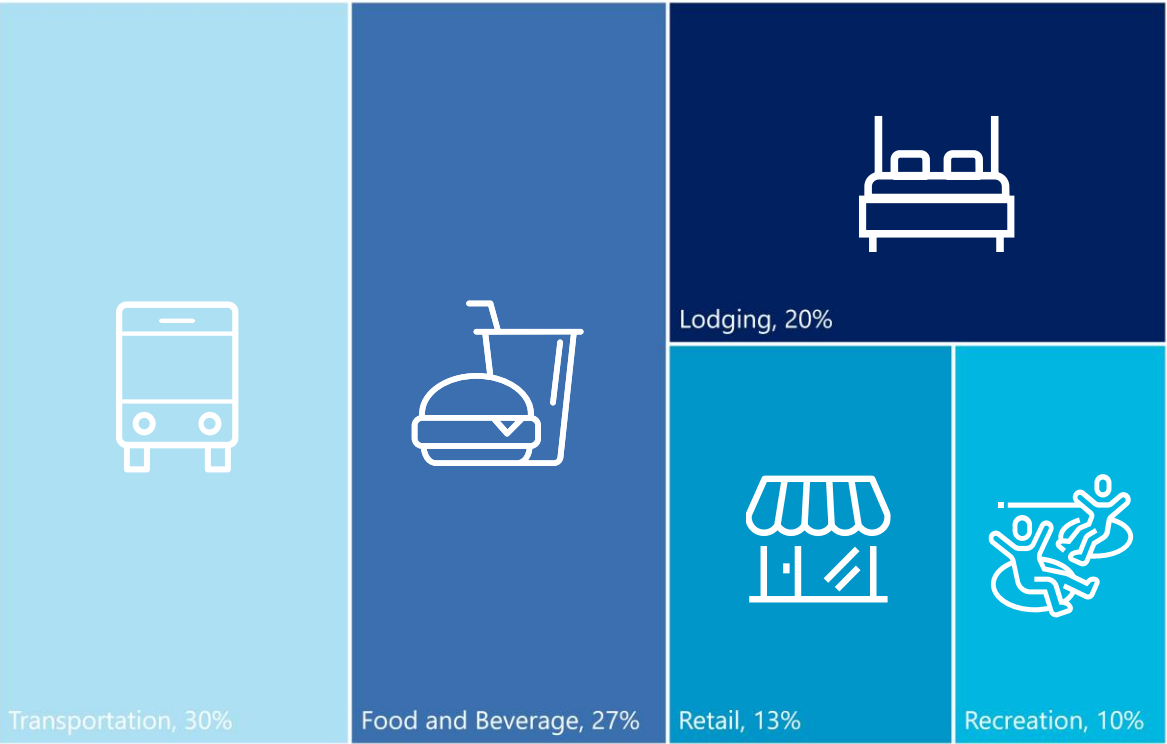
Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

PRINCE GEORGE'S COUNTY ECONOMIC IMPACTS

More than 30,000 visitor-supported jobs represent 9.6% of all jobs in Prince George's County.

Visitor impacts in Prince George's County

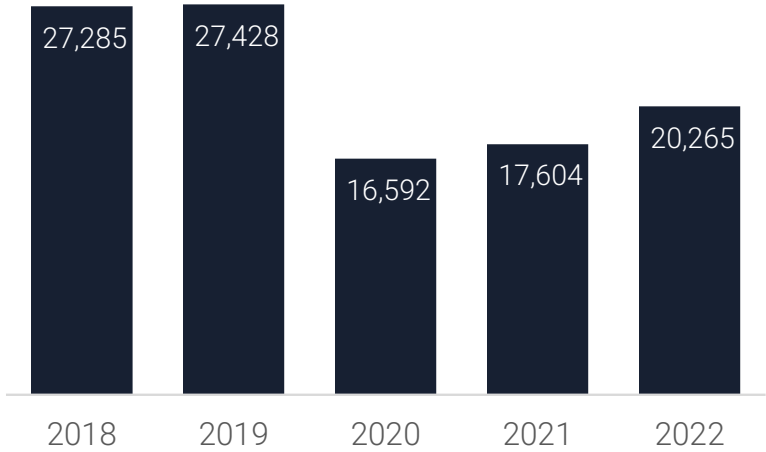
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	27,285	27,428	16,592	17,604	20,265	15.1%	73.9%
Total	39,697	39,928	25,896	26,637	30,006	12.6%	75.1%
Share of State	17.55%	17.63%	15.60%	15.34%	16.02%		
Labor Income							
Direct	\$999.0	\$1,058.2	\$659.5	\$751.1	\$902.1	20.1%	85.3%
Total	\$1,751.2	\$1,851.0	\$1,244.7	\$1,349.4	\$1,564.4	15.9%	84.5%
Share of State	16.97%	17.42%	15.37%	15.46%	16.16%		
Tax revenues							
Federal	\$366.7	\$386.1	\$227.8	\$261.9	\$312.7	19.4%	81.0%
State & Local	\$403.7	\$421.8	\$232.0	\$279.8	\$347.4	24.2%	82.4%
Hotel	\$32.7	\$34.6	\$12.1	\$18.7	\$32.9	76.1%	95.0%
Total	\$803.1	\$842.5	\$471.9	\$560.3	\$693.0	23.7%	82.2%

Source: Tourism Economics

Prince George's County direct employment timeline

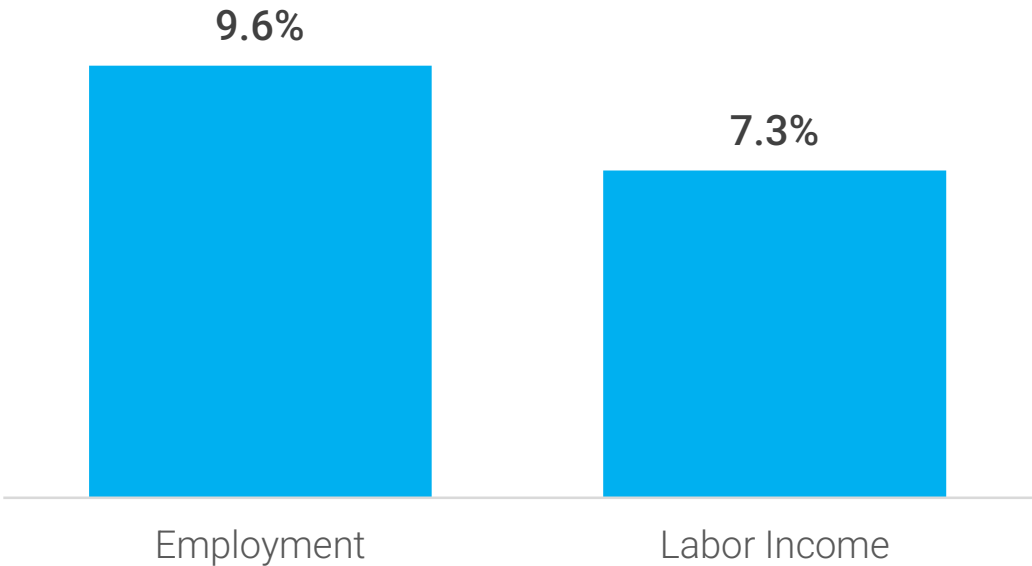
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

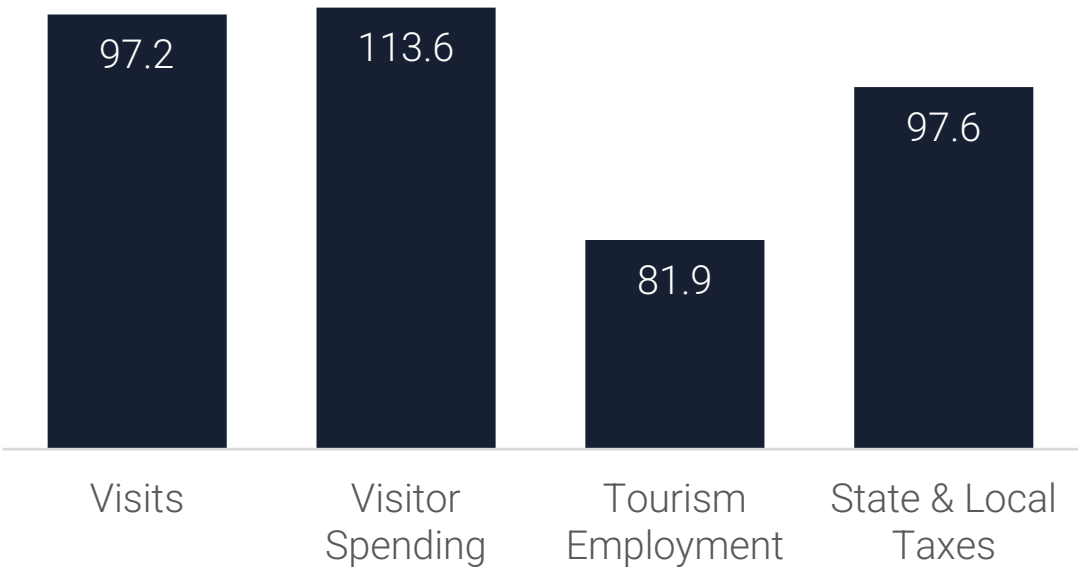


QUEEN ANNE'S COUNTY HIGHLIGHTS

With visitor spending surpassing pre-pandemic (2019) levels in Queen Anne’s County, visits and tax revenues have also mostly recovered.

Queen Anne's County key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Queen Anne's County has grown to 97% of 2019 levels.

Queen Anne's County visitor volume

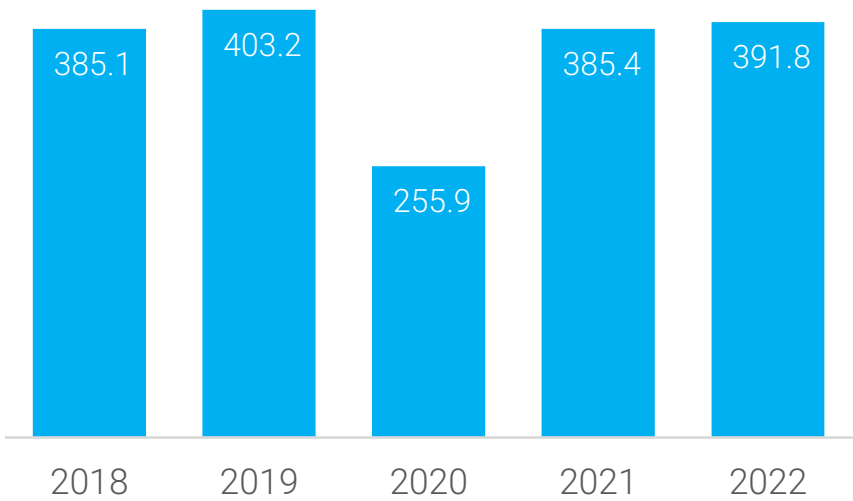
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	207.8	221.2	147.3	227.7	233.4
Overnight	177.2	182.0	108.5	157.7	158.4
Total Visitors	385.1	403.2	255.9	385.4	391.8
Growth rate		4.7%	-36.5%	50.6%	1.7%

Source: D. K. Shifflet, Tourism Economics

Queen Anne's County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



QUEEN ANNE'S COUNTY VISITOR SPENDING

Visitor spending grew 7% in Queen Anne's County in 2022.

Queen Anne's County visitor spending and annual growth

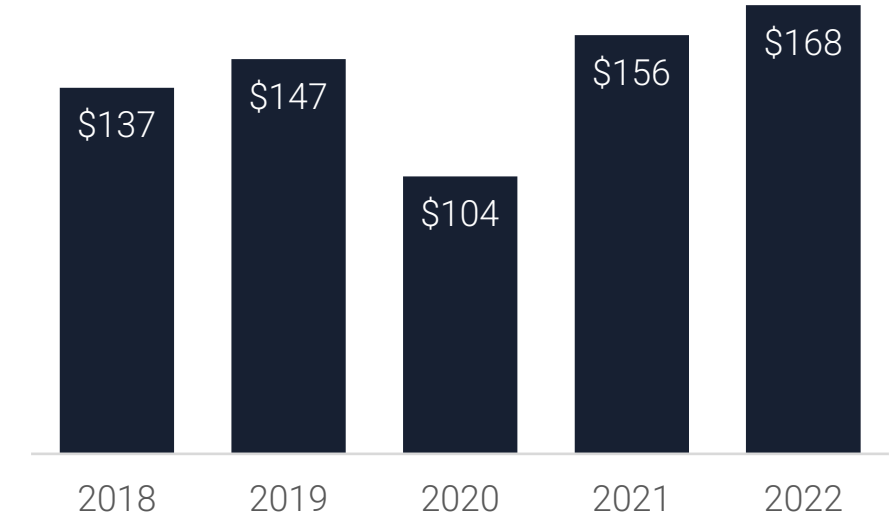
Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$136.7	\$147.4	\$103.6	\$156.3	\$167.5	7.1%	113.6%
Lodging*	\$41.1	\$43.9	\$28.1	\$37.6	\$41.8	11.1%	95.3%
Food & beverage	\$27.1	\$30.3	\$25.5	\$35.6	\$37.4	5.1%	123.4%
Retail	\$19.1	\$20.0	\$16.8	\$23.2	\$24.5	5.9%	122.4%
Recreation	\$17.1	\$17.6	\$11.4	\$17.5	\$19.1	8.7%	108.6%
Transportation**	\$32.3	\$35.6	\$21.8	\$42.4	\$44.7	5.3%	125.5%

* Lodging includes 2nd home spending
** Transportation includes both ground and air transportation
Source: D. K. Shifflet, Tourism Economics

Queen Anne's County visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

QUEEN ANNE'S COUNTY ECONOMIC IMPACTS

More than 1,500 visitor-supported jobs represent 10% of all jobs in Queen Anne's County.

Visitor impacts in Queen Anne's County

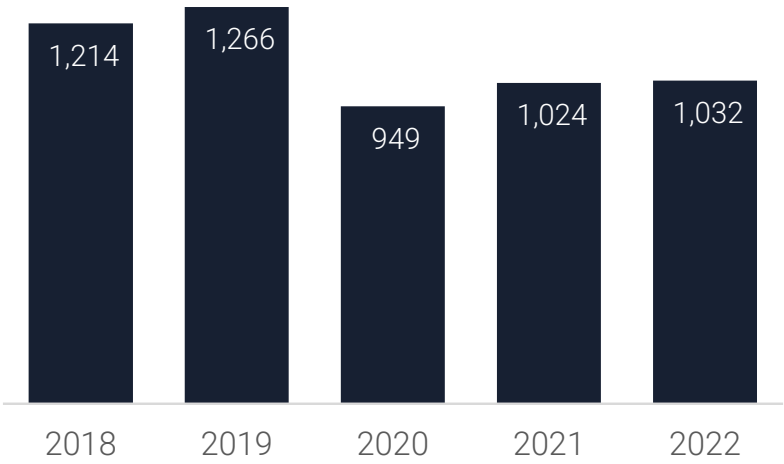
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	1,214	1,266	949	1,024	1,032	0.8%	81.5%
Total	1,807	1,878	1,469	1,533	1,539	0.4%	81.9%
Share of State	0.80%	0.83%	0.88%	0.88%	0.82%		
Labor Income							
Direct	\$41.4	\$44.7	\$33.1	\$36.8	\$37.9	2.9%	84.7%
Total	\$75.8	\$81.4	\$63.5	\$67.4	\$68.7	1.8%	84.3%
Share of State	0.73%	0.77%	0.78%	0.77%	0.71%		
Tax revenues							
Federal	\$16.1	\$17.3	\$12.1	\$13.9	\$14.5	4.4%	83.7%
State & Local	\$18.0	\$19.4	\$14.5	\$18.3	\$18.9	3.5%	97.6%
Hotel	\$0.6	\$0.7	\$0.4	\$0.8	\$0.9	19.0%	133.1%
Total	\$34.7	\$37.3	\$27.1	\$32.9	\$34.3	4.2%	91.8%

Source: Tourism Economics

Queen Anne's County direct employment timeline

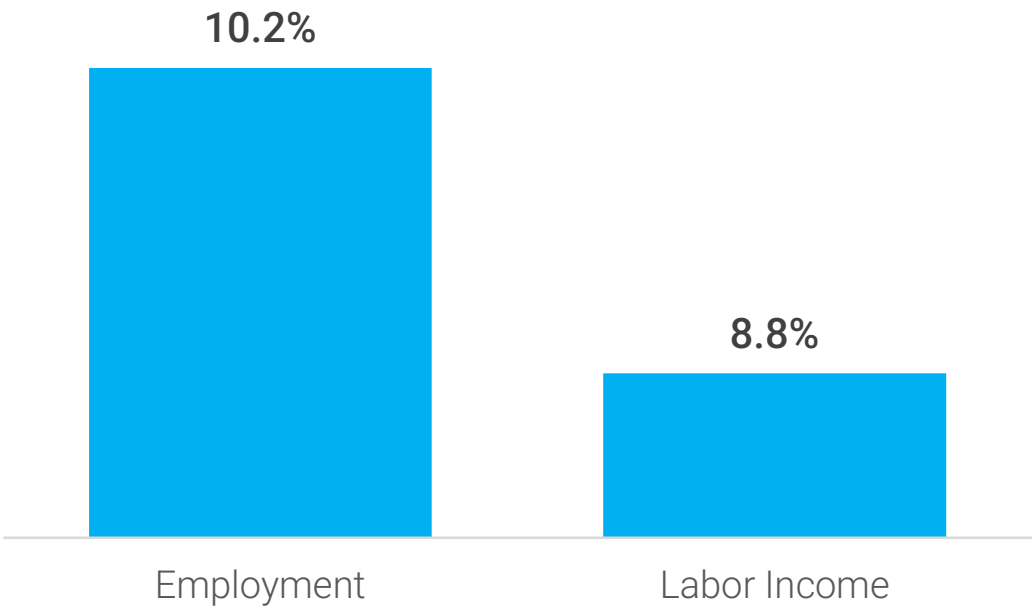
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

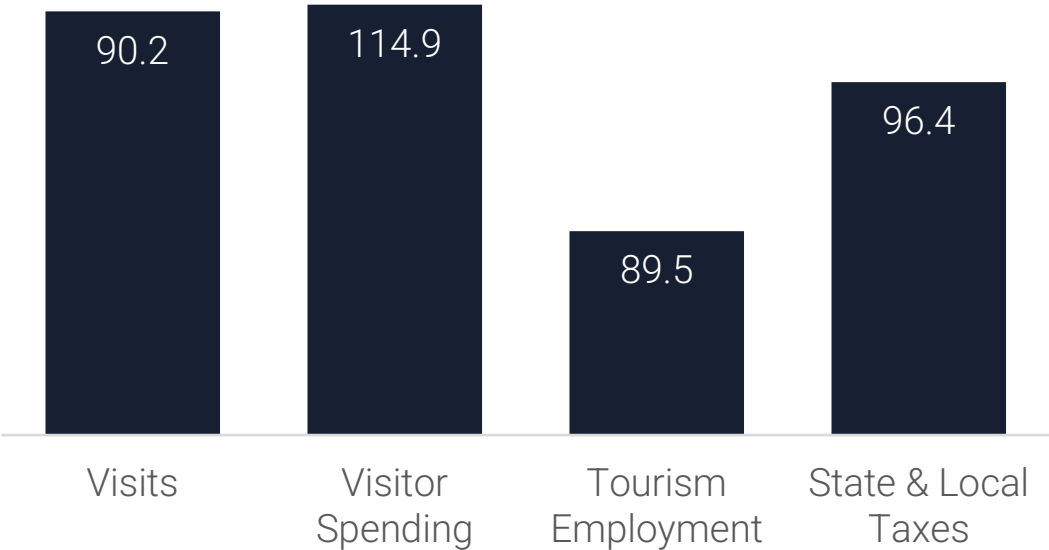


ST. MARY'S COUNTY HIGHLIGHTS

Led by visitor spending, all key tourism indicators reached 90% of pre-pandemic levels in 2022.

St. Mary's County key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in St. Mary's County has recovered to 90% of 2019 levels.

St. Mary's County visitor volume

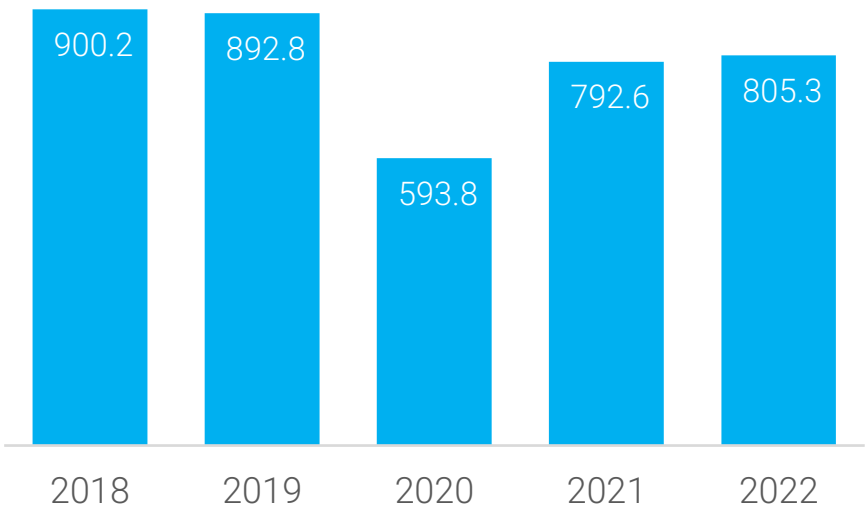
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	444.9	449.4	315.1	435.1	445.9
Overnight	455.3	443.4	278.6	357.5	359.4
Total Visitors	900.2	892.8	593.8	792.6	805.3
Growth rate		-0.8%	-33.5%	33.5%	1.6%

Source: D. K. Shifflet, Tourism Economics

St. Mary's County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



ST. MARY'S COUNTY VISITOR SPENDING

Visitor spending grew 5% in St. Mary's County in 2022 with all categories exceeding pre-pandemic levels.

St. Mary's County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$173.5	\$177.7	\$145.9	\$195.0	\$204.2	4.7%	114.9%
Lodging*	\$51.6	\$53.5	\$41.6	\$52.8	\$56.0	6.0%	104.7%
Food & beverage	\$44.8	\$47.4	\$42.8	\$53.6	\$55.1	2.7%	116.4%
Retail	\$23.8	\$23.6	\$22.9	\$27.8	\$28.7	2.9%	121.3%
Recreation	\$18.5	\$17.8	\$15.6	\$20.8	\$22.8	9.4%	127.5%
Transportation**	\$34.8	\$35.4	\$23.0	\$39.9	\$41.7	4.5%	117.7%

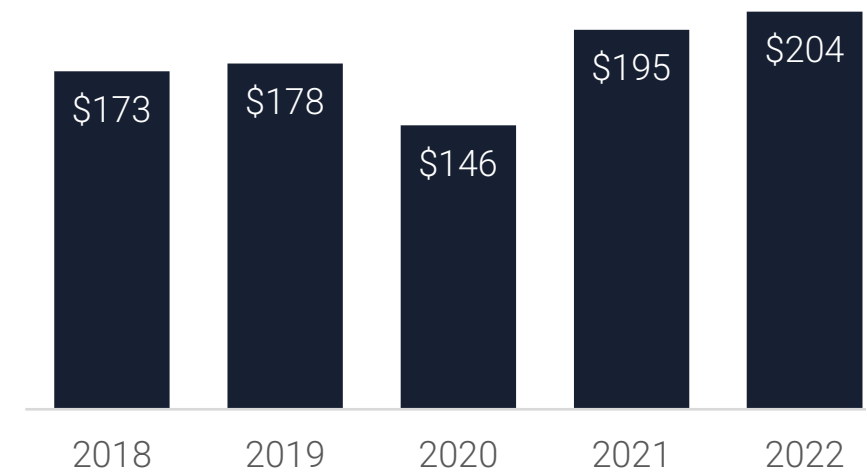
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

St. Mary's County visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

ST. MARY'S COUNTY ECONOMIC IMPACTS

Nearly 2,200 visitor-supported jobs represent 4.7% of all jobs in St. Mary's County.

Visitor impacts in St. Mary's County

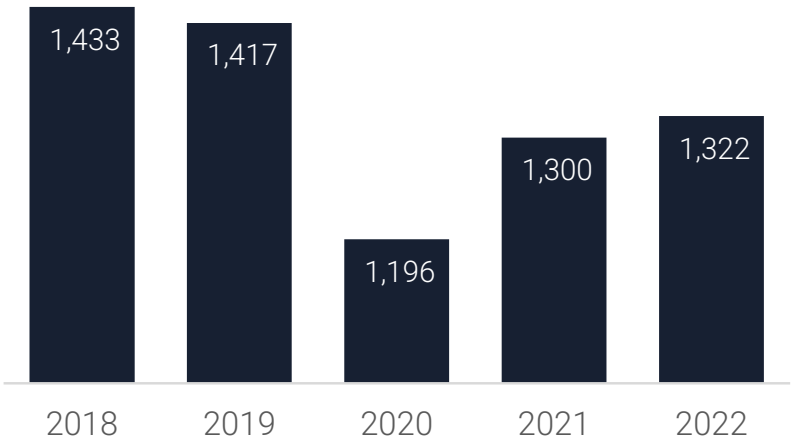
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	1,433	1,417	1,196	1,300	1,322	1.7%	93.3%
Total	2,442	2,429	2,074	2,178	2,174	-0.2%	89.5%
Share of State	1.08%	1.07%	1.25%	1.25%	1.16%		
Labor Income							
Direct	\$41.8	\$43.3	\$37.0	\$42.4	\$43.5	2.4%	100.5%
Total	\$92.2	\$95.3	\$82.1	\$89.3	\$90.7	1.5%	95.1%
Share of State	0.89%	0.90%	1.01%	1.02%	0.94%		
Tax revenues							
Federal	\$19.7	\$20.3	\$15.9	\$18.2	\$18.8	3.7%	92.7%
State & Local	\$25.1	\$25.6	\$21.7	\$24.3	\$24.7	1.5%	96.4%
Hotel	\$1.1	\$1.0	\$0.7	\$0.9	\$1.1	18.5%	107.1%
Total	\$45.9	\$47.0	\$38.2	\$43.4	\$44.6	2.8%	95.0%

Source: Tourism Economics

St. Mary's County direct employment timeline

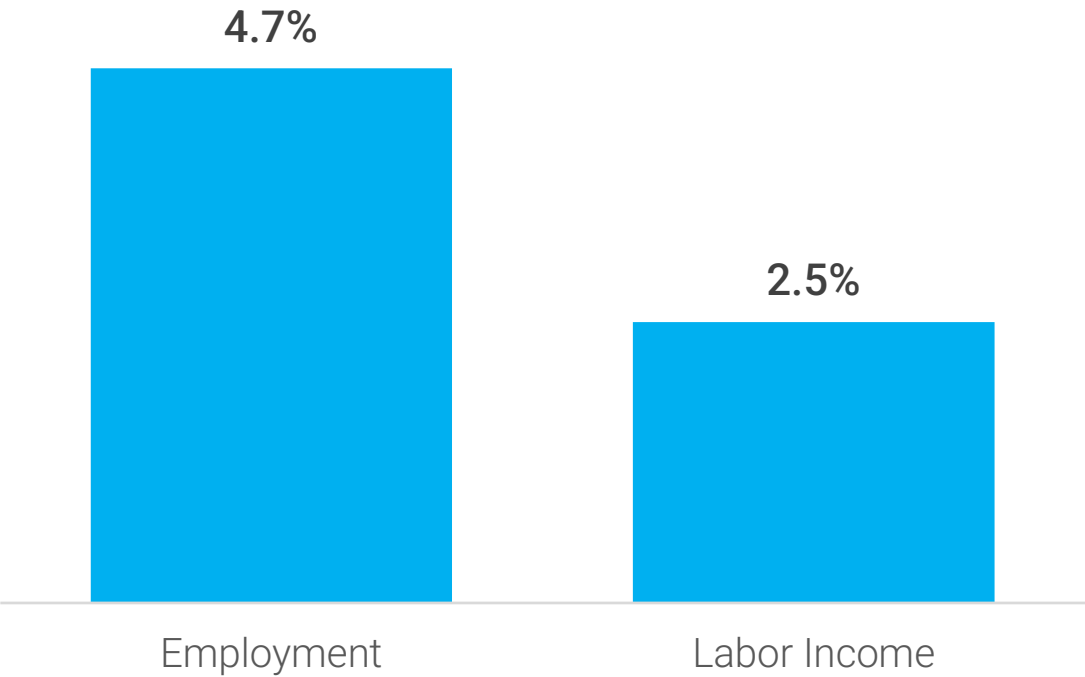
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

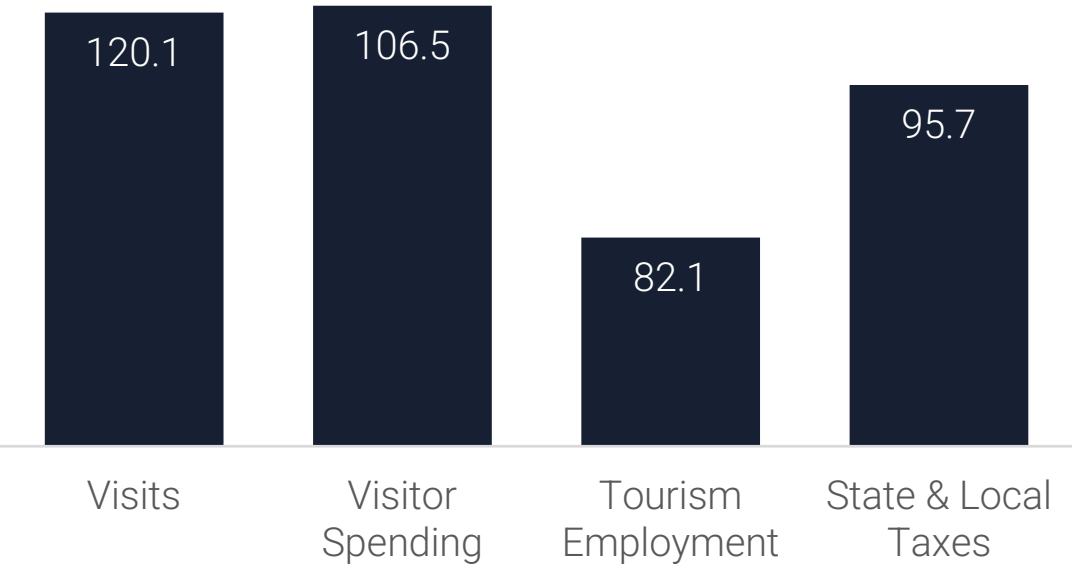


SOMERSET COUNTY HIGHLIGHTS

Several key indicators in Somerset County are near or have surpassed pre-pandemic (2019) levels in 2022.

Somerset County key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Somerset County has grown to 120% of 2019 levels.

Somerset County visitor volume

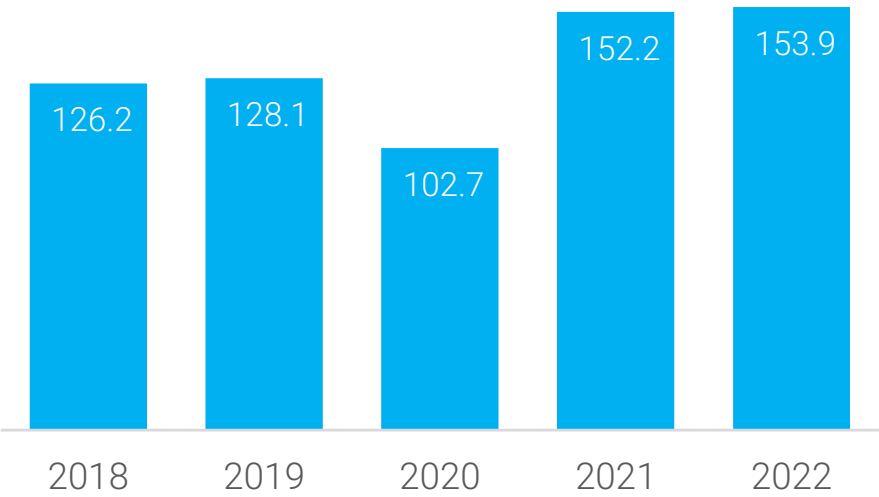
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	51.5	52.7	44.5	65.4	67.4
Overnight	74.6	75.3	58.2	86.8	86.5
Total Visitors	126.2	128.1	102.7	152.2	153.9
Growth rate		1.5%	-19.8%	48.2%	1.1%

Source: D. K. Shifflet, Tourism Economics

Somerset County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



SOMERSET COUNTY VISITOR SPENDING

Visitor spending grew 4% in Somerset County in 2022.

Somerset County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$26.5	\$28.1	\$21.6	\$28.8	\$29.9	3.7%	106.5%
Lodging*	\$13.4	\$14.2	\$11.0	\$13.3	\$13.7	3.4%	96.1%
Food & beverage	\$3.8	\$3.9	\$2.9	\$3.8	\$3.9	3.9%	99.4%
Retail	\$1.7	\$1.8	\$1.8	\$2.5	\$2.5	1.7%	135.4%
Recreation	\$1.6	\$1.7	\$1.3	\$1.7	\$1.9	6.1%	106.0%
Transportation**	\$6.0	\$6.3	\$4.6	\$7.6	\$7.9	4.3%	125.9%

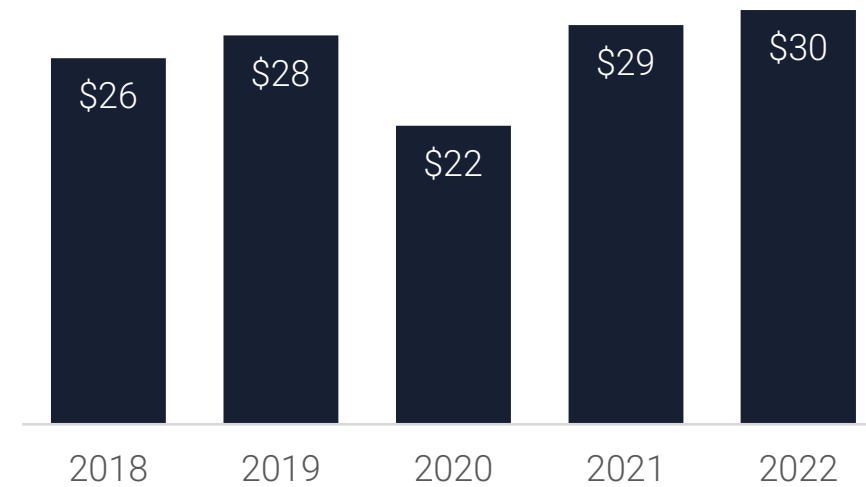
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Somerset County visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

SOMERSET COUNTY ECONOMIC IMPACTS

Nearly 330 visitor-supported jobs represent 5% of all jobs in Somerset County.

Visitor impacts in Somerset County

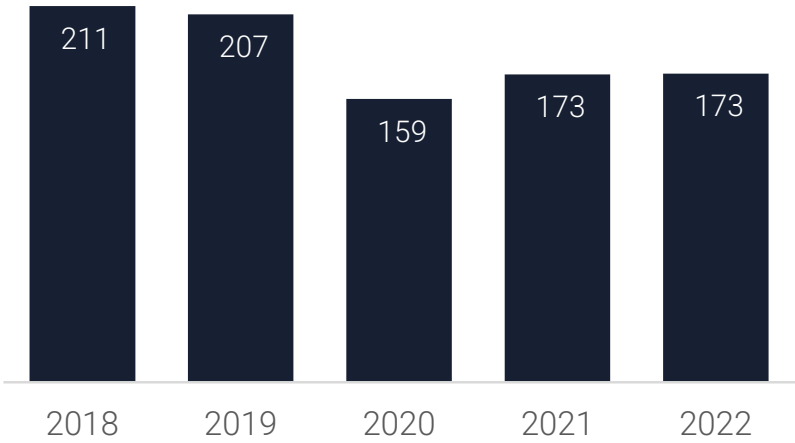
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	211	207	159	173	173	0.3%	84.0%
Total	401	396	310	326	325	-0.3%	82.1%
Share of State	0.18%	0.17%	0.19%	0.19%	0.17%		
Labor Income							
Direct	\$6.2	\$6.4	\$5.5	\$6.2	\$6.2	0.8%	96.4%
Total	\$16.5	\$17.0	\$14.3	\$15.4	\$15.5	0.8%	91.1%
Share of State	0.16%	0.16%	0.18%	0.18%	0.16%		
Tax revenues							
Federal	\$3.4	\$3.6	\$2.7	\$3.0	\$3.1	3.0%	88.4%
State & Local	\$3.8	\$4.0	\$3.3	\$3.8	\$3.8	0.0%	95.7%
Hotel	\$0.1	\$0.1	\$0.1	\$0.1	\$0.1	-0.9%	108.3%
Total	\$7.3	\$7.6	\$6.1	\$7.0	\$7.0	1.3%	92.4%

Source: Tourism Economics

Somerset County direct employment timeline

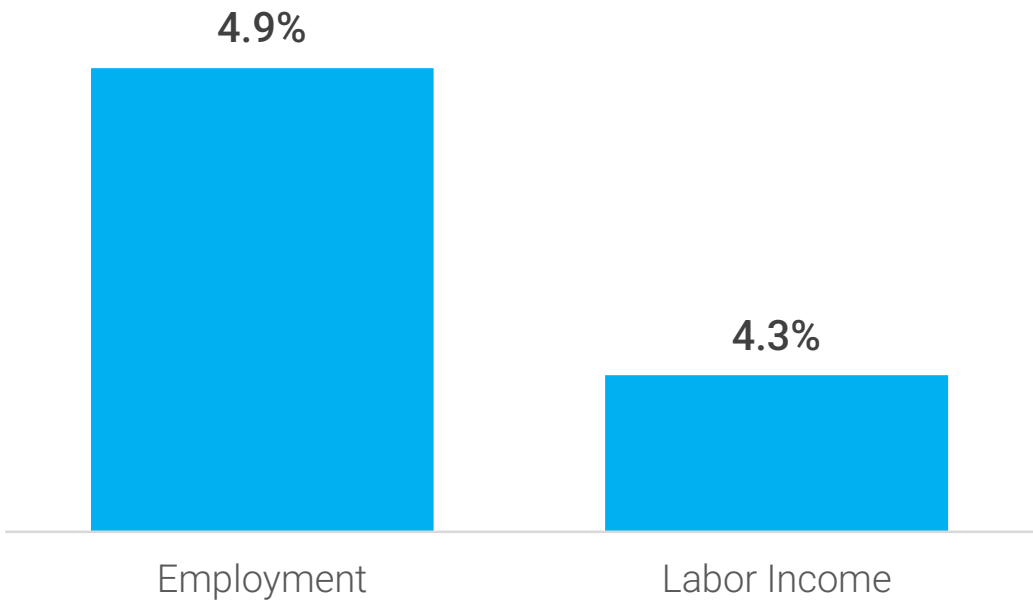
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



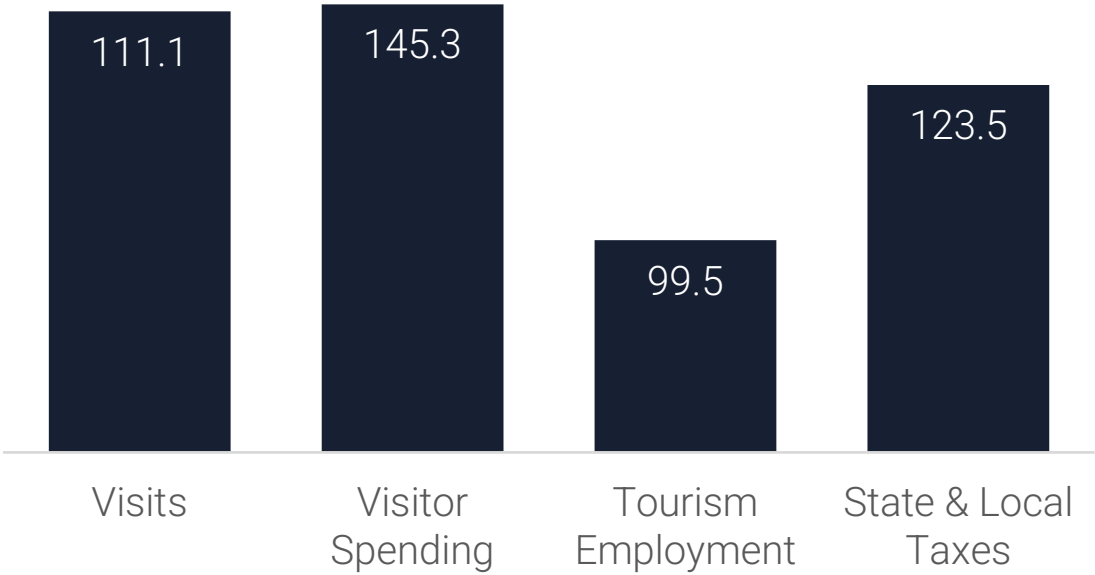
Source: BLS, Tourism Economics



TALBOT COUNTY HIGHLIGHTS

All key indicators in Talbot County are near or have surpassed pre-pandemic (2019) levels in 2022.

Talbot County key indicators
Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Talbot County has grown to 111% of 2019 levels.

Talbot County visitor volume

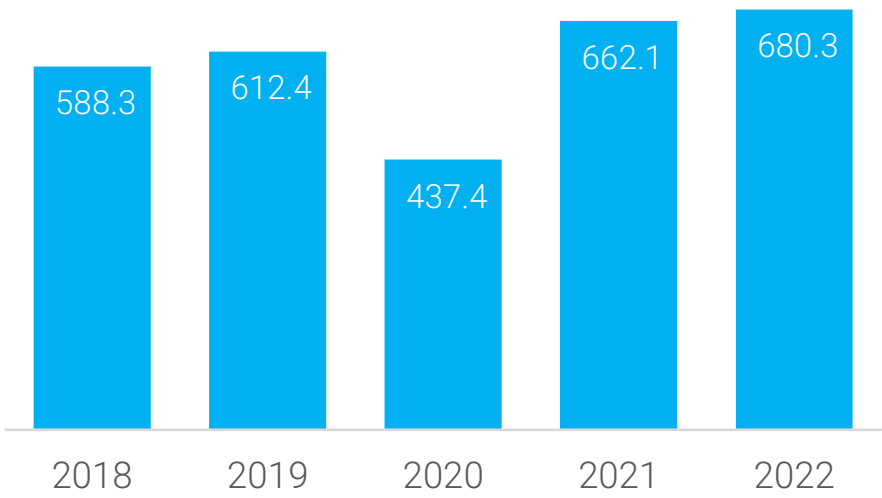
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	357.2	371.6	261.5	406.1	416.4
Overnight	231.1	240.8	175.9	256.0	263.9
Total Visitors	588.3	612.4	437.4	662.1	680.3
Growth rate		4.1%	-28.6%	51.4%	2.8%

Source: D. K. Shifflet, Tourism Economics

Talbot County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



TALBOT COUNTY VISITOR SPENDING

Visitor spending grew 7% in Talbot County in 2022, 35% more than in 2019.

Talbot County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

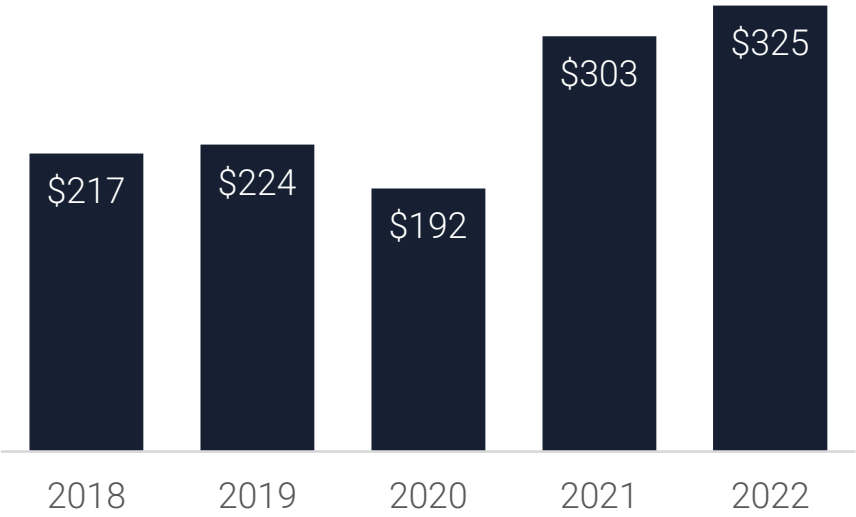
	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$217.2	\$223.6	\$191.7	\$302.8	\$325.0	7.3%	145.3%
Lodging*	\$65.8	\$68.4	\$53.7	\$78.8	\$83.7	6.1%	122.4%
Food & beverage	\$49.3	\$50.7	\$48.8	\$72.6	\$76.2	4.9%	150.2%
Retail	\$27.3	\$27.3	\$27.1	\$39.3	\$41.9	6.7%	153.4%
Recreation	\$28.3	\$28.7	\$22.0	\$34.7	\$36.7	5.8%	127.8%
Transportation**	\$46.5	\$48.5	\$40.0	\$77.4	\$86.5	11.8%	178.6%

* Lodging includes 2nd home spending
** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Talbot County visitor spending

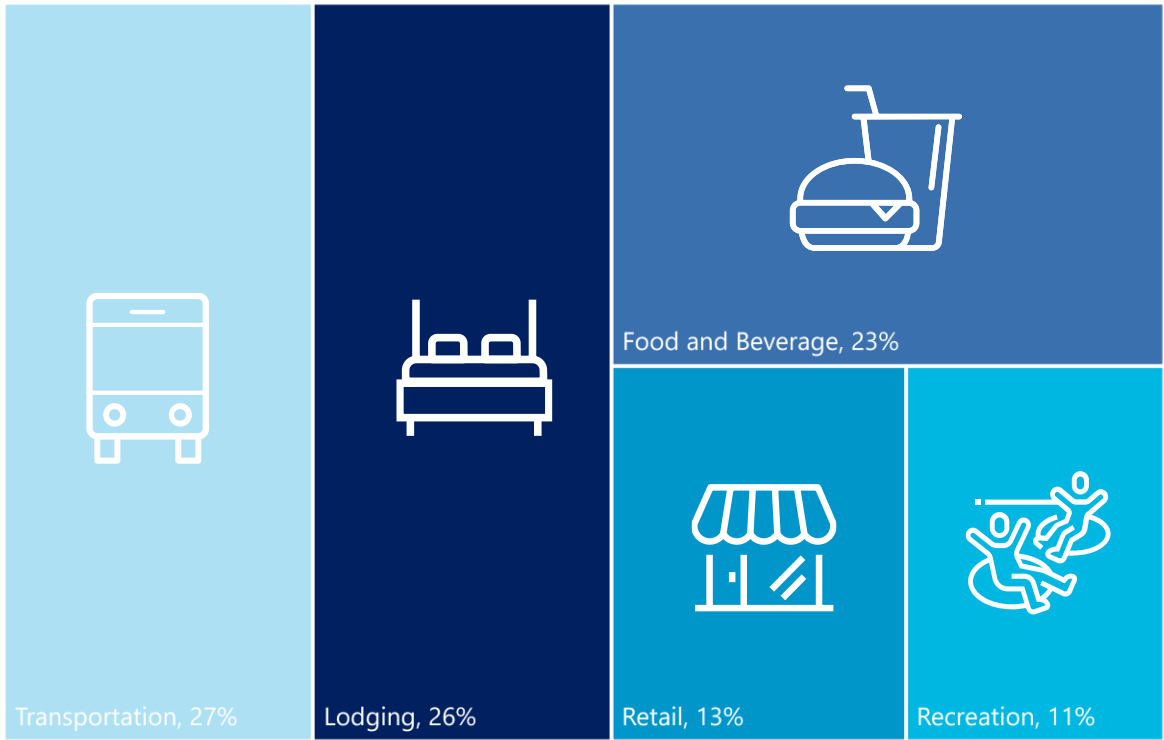
Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

TALBOT COUNTY ECONOMIC IMPACTS

Nearly 2,800 visitor-supported jobs represent 16% of all jobs in Talbot County with jobs very close to pre-pandemic levels.

Visitor impacts in Talbot County

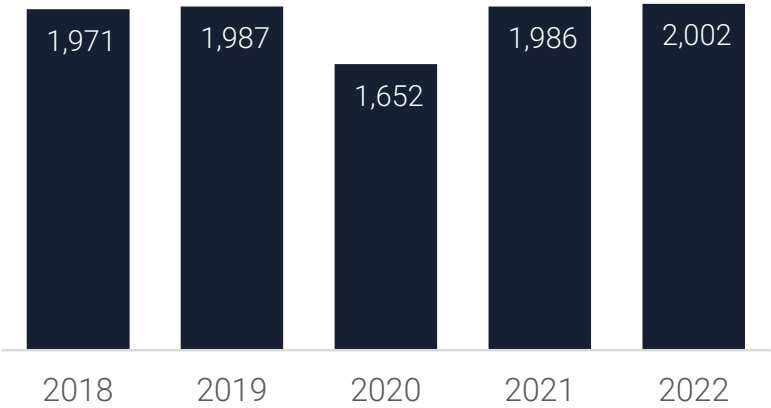
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	1,971	1,987	1,652	1,986	2,002	0.8%	100.8%
Total	2,755	2,775	2,397	2,766	2,762	-0.1%	99.5%
Share of State	1.22%	1.23%	1.44%	1.59%	1.47%		
Labor Income							
Direct	\$67.8	\$68.9	\$63.0	\$79.8	\$81.3	2.0%	118.0%
Total	\$113.3	\$115.4	\$109.5	\$131.1	\$130.9	-0.1%	113.4%
Share of State	1.10%	1.09%	1.35%	1.50%	1.35%		
Tax revenues							
Federal	\$24.3	\$24.8	\$21.2	\$26.9	\$27.7	2.8%	111.7%
State & Local	\$28.7	\$29.5	\$26.8	\$35.5	\$36.5	2.8%	123.5%
Hotel	\$1.4	\$1.4	\$1.1	\$2.0	\$2.0	2.8%	141.9%
Total	\$54.4	\$55.7	\$49.1	\$64.3	\$66.1	2.8%	118.7%

Source: Tourism Economics

Talbot County direct employment timeline

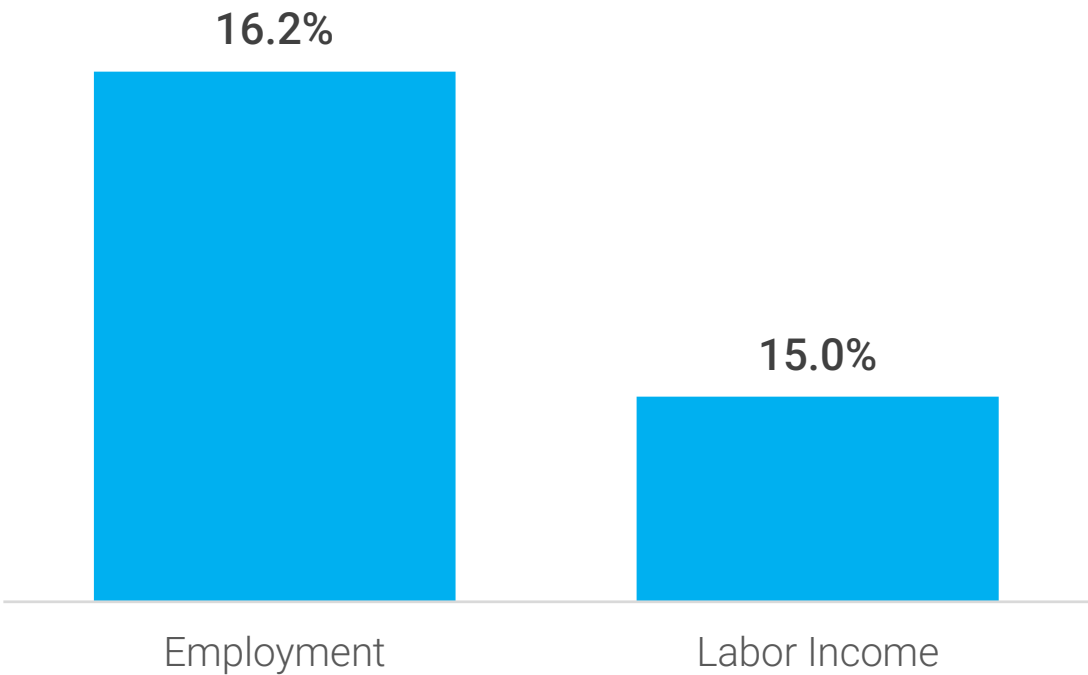
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

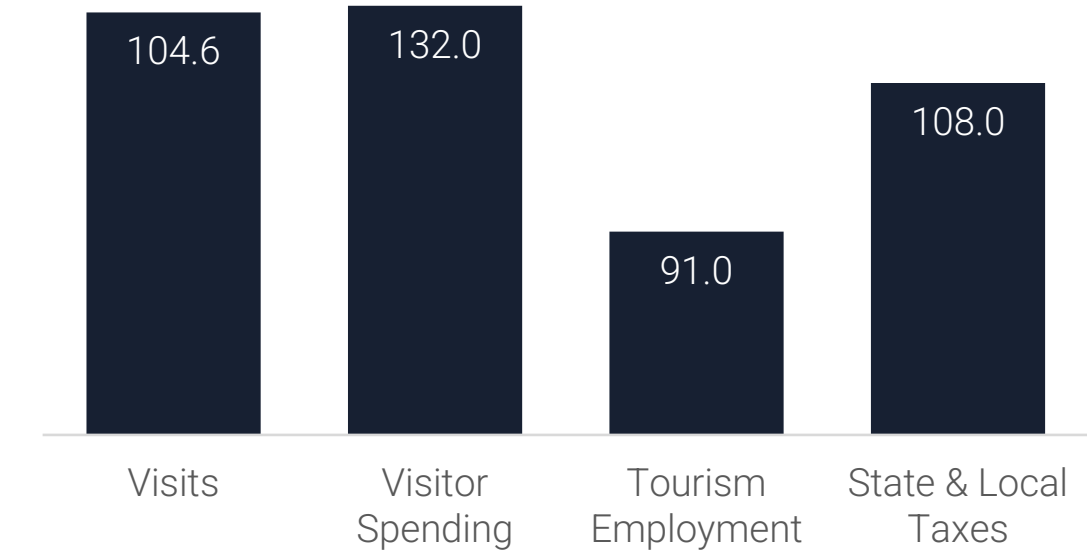


WASHINGTON COUNTY HIGHLIGHTS

Several key indicators in Washington County are near or have surpassed pre-pandemic (2019) levels in 2022.

Washington County key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Washington County has recovered to 104% of 2019 levels.

Washington County visitor volume

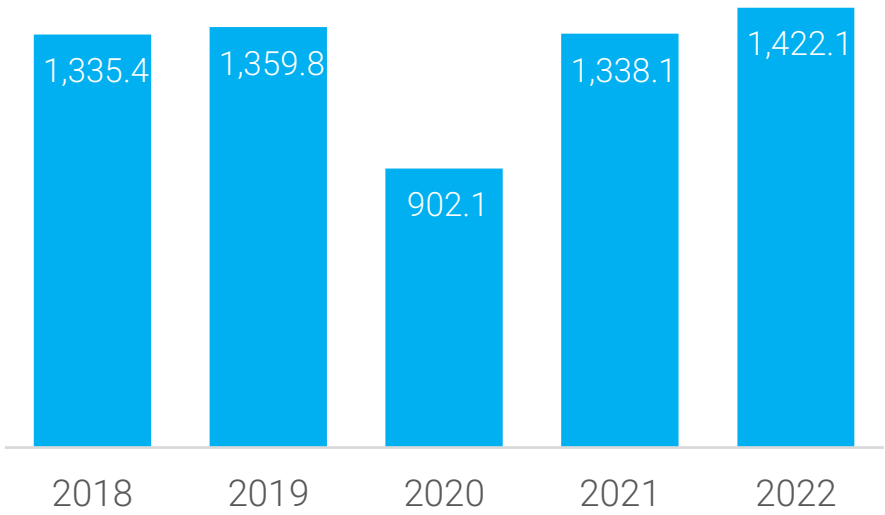
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	712.6	723.8	486.8	751.9	796.9
Overnight	622.8	636.0	415.3	586.3	625.1
Total Visitors	1,335.4	1,359.8	902.1	1,338.1	1,422.1
Growth rate		1.8%	-33.7%	48.3%	6.3%

Source: D. K. Shifflet, Tourism Economics

Washington County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



WASHINGTON COUNTY VISITOR SPENDING

Visitor spending grew 11% in Washington County in 2022 to reach \$356 million in 2022.

Washington County visitor spending and annual growth

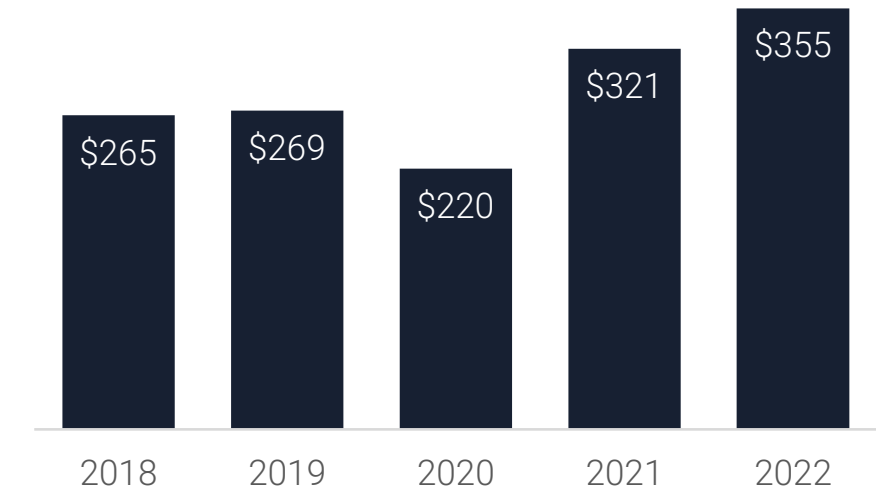
Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$265.2	\$269.2	\$220.2	\$321.4	\$355.5	10.6%	132.0%
Lodging*	\$52.2	\$53.1	\$40.2	\$59.1	\$66.5	12.6%	125.2%
Food & beverage	\$72.5	\$75.1	\$66.5	\$89.6	\$97.3	8.6%	129.5%
Retail	\$56.5	\$56.7	\$47.1	\$58.4	\$63.1	8.0%	111.3%
Recreation	\$37.6	\$37.7	\$26.5	\$39.8	\$43.9	10.3%	116.4%
Transportation**	\$46.4	\$46.5	\$39.9	\$74.6	\$84.6	13.5%	181.9%

* Lodging includes 2nd home spending
** Transportation includes both ground and air transportation
Source: D. K. Shifflet, Tourism Economics

Washington County visitor spending

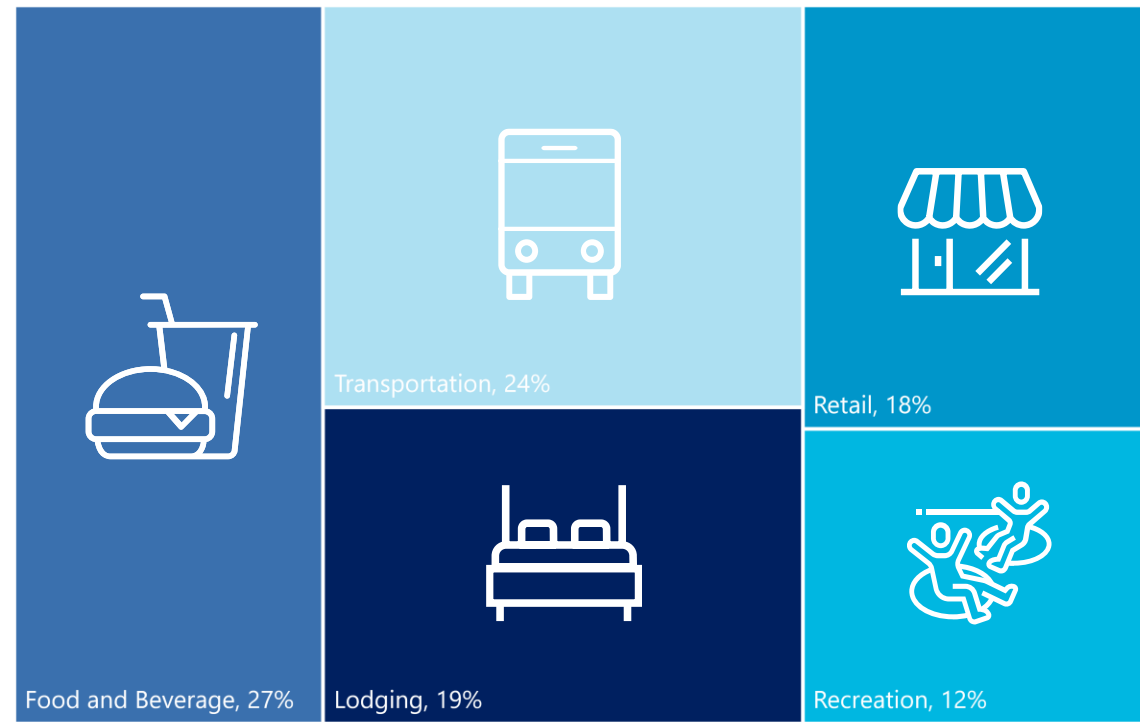
Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

WASHINGTON COUNTY ECONOMIC IMPACTS

Nearly 4,800 visitor-supported jobs represent 7.6% of all jobs in Washington County

Visitor impacts in Washington County

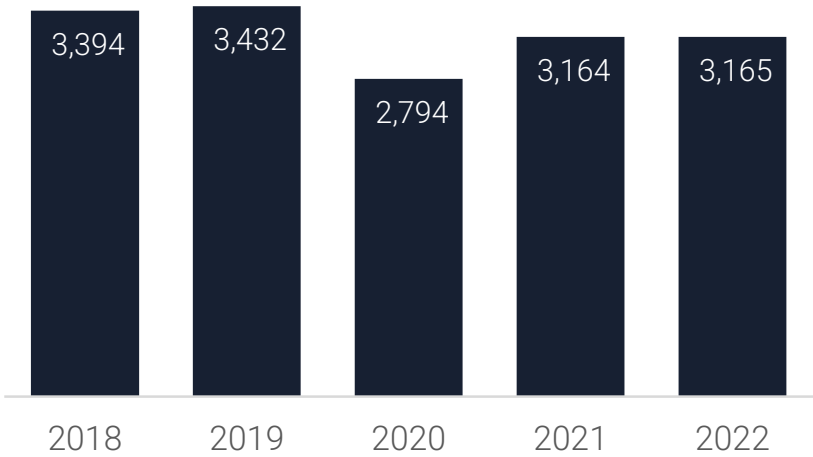
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	3,394	3,432	2,794	3,164	3,165	0.0%	92.2%
Total	5,202	5,252	4,399	4,788	4,779	-0.2%	91.0%
Share of State	2.30%	2.32%	2.65%	2.76%	2.55%		
Labor Income							
Direct	\$90.3	\$94.7	\$86.0	\$100.1	\$105.6	5.6%	111.5%
Total	\$176.7	\$184.9	\$169.6	\$187.0	\$194.7	4.1%	105.3%
Share of State	1.71%	1.74%	2.09%	2.14%	2.01%		
Tax revenues							
Federal	\$36.4	\$37.9	\$31.2	\$36.6	\$39.1	6.9%	103.2%
State & Local	\$39.8	\$40.8	\$34.6	\$42.5	\$44.1	3.7%	108.0%
Hotel	\$2.2	\$2.3	\$1.5	\$2.4	\$1.6	-33.5%	69.9%
Total	\$78.4	\$81.0	\$67.3	\$81.5	\$84.8	4.1%	104.7%

Source: Tourism Economics

Washington County direct employment timeline

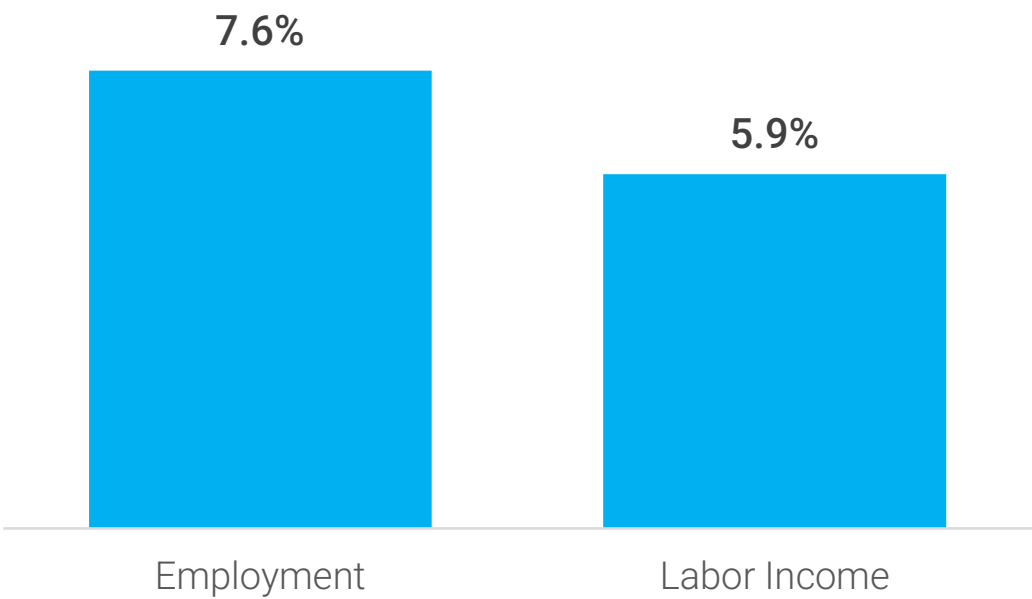
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

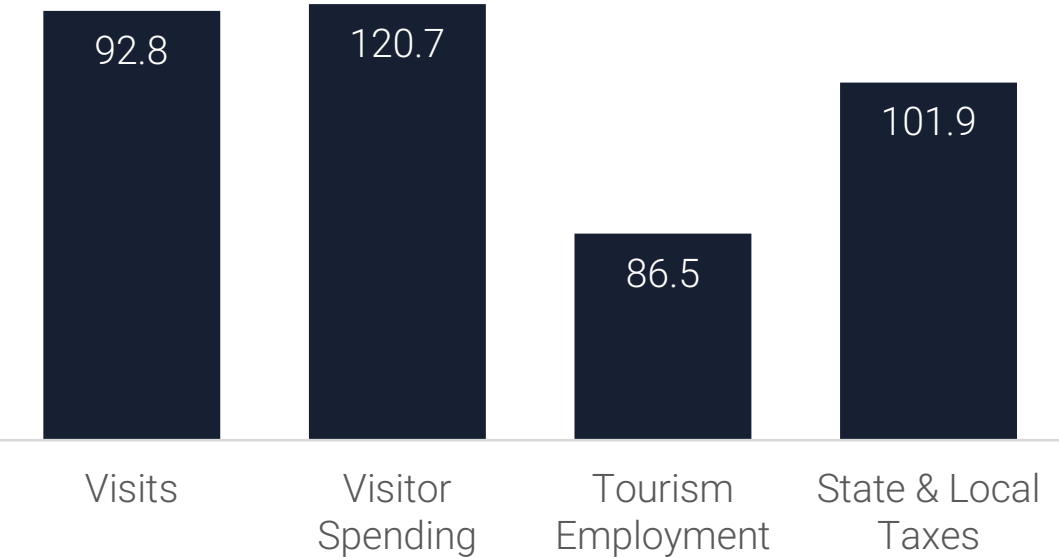


WICOMICO COUNTY HIGHLIGHTS

Led by visitor spending, several key indicators in Wicomico County are near or have surpassed pre-pandemic (2019) levels in 2022.

Wicomico County key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Wicomico County has recovered to 93% of 2019 levels.

Wicomico County visitor volume

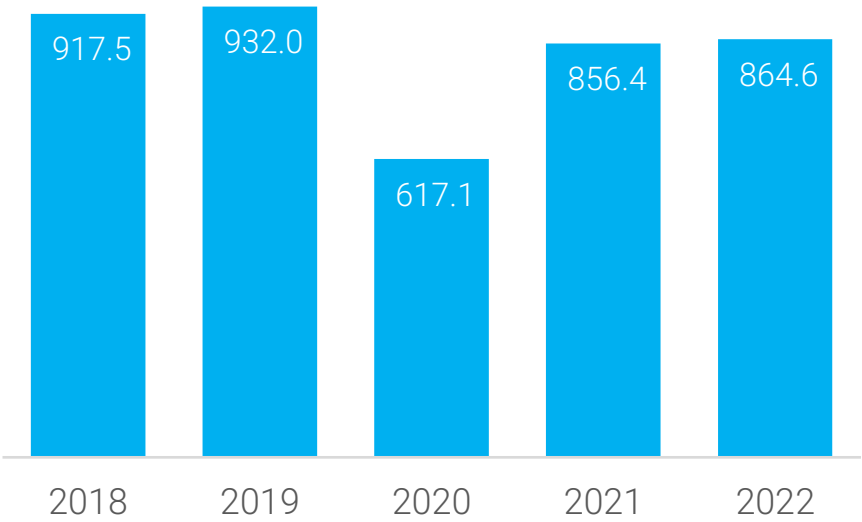
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	473.9	482.9	340.8	501.5	511.6
Overnight	443.6	449.2	276.3	354.8	353.0
Total Visitors	917.5	932.0	617.1	856.4	864.6
Growth rate		1.6%	-33.8%	38.8%	1.0%

Source: D. K. Shifflet, Tourism Economics

Wicomico County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



WICOMICO COUNTY VISITOR SPENDING

Visitor spending grew 1% in Wicomico County in 2022 as all categories surged to new highs.

Wicomico County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

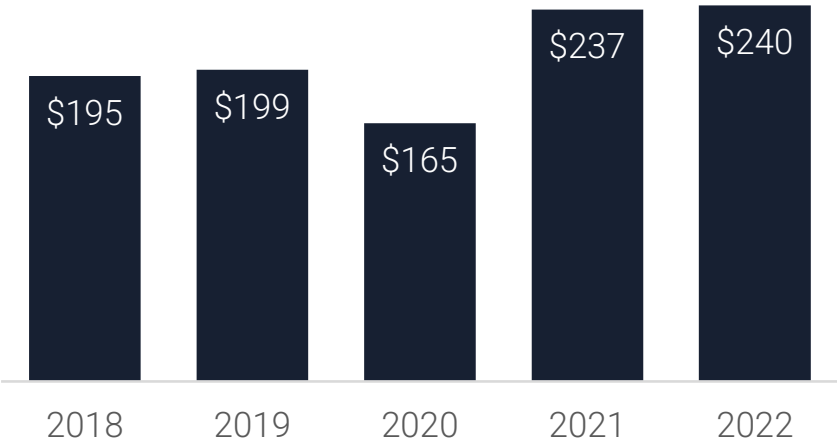
	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$194.8	\$198.6	\$164.7	\$237.1	\$239.7	1.1%	120.7%
Lodging*	\$40.2	\$41.1	\$31.8	\$45.6	\$46.6	2.1%	113.2%
Food & beverage	\$57.3	\$59.5	\$51.5	\$68.4	\$68.9	0.7%	115.8%
Retail	\$35.6	\$35.3	\$31.8	\$40.9	\$39.0	-4.7%	110.6%
Recreation	\$22.7	\$22.4	\$16.4	\$23.8	\$25.1	5.6%	112.2%
Transportation**	\$39.0	\$40.3	\$33.2	\$58.4	\$60.2	3.0%	149.2%

* Lodging includes 2nd home spending
** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Wicomico County visitor spending

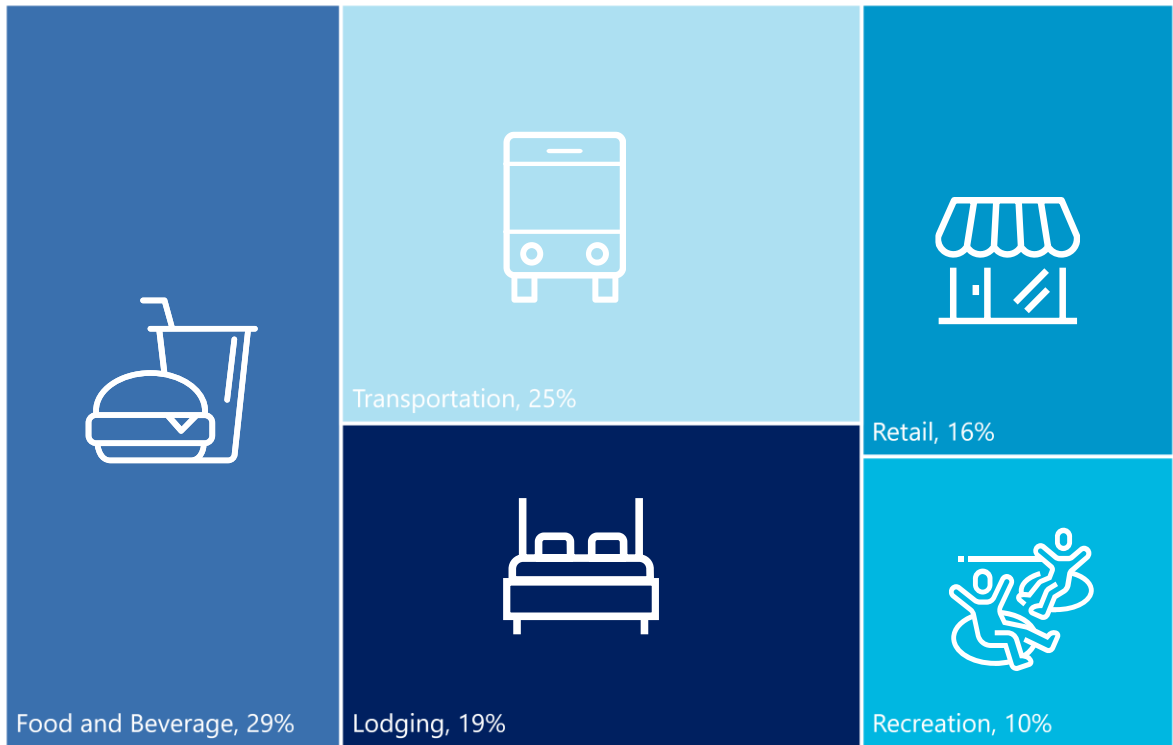
Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

WICOMICO COUNTY ECONOMIC IMPACTS

More than 3,200 visitor-supported jobs represent 7.1% of all jobs in Wicomico County.

Visitor impacts in Wicomico County

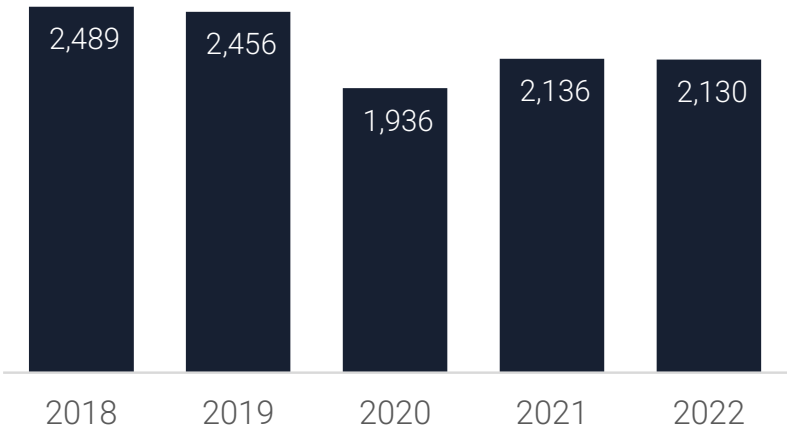
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	2,489	2,456	1,936	2,136	2,130	-0.3%	86.7%
Total	3,766	3,726	3,041	3,239	3,223	-0.5%	86.5%
Share of State	1.66%	1.65%	1.83%	1.86%	1.72%		
Labor Income							
Direct	\$63.6	\$66.5	\$55.5	\$62.6	\$65.9	5.2%	99.1%
Total	\$123.1	\$128.4	\$110.2	\$118.5	\$123.1	3.9%	95.9%
Share of State	1.19%	1.21%	1.36%	1.36%	1.27%		
Tax revenues							
Federal	\$25.6	\$26.6	\$20.7	\$23.7	\$25.0	5.2%	94.0%
State & Local	\$28.6	\$28.8	\$24.7	\$29.8	\$29.4	-1.3%	101.9%
Hotel	\$1.6	\$1.0	\$0.8	\$1.4	\$1.4	-0.1%	138.3%
Total	\$55.8	\$56.4	\$46.3	\$54.9	\$55.8	1.6%	98.8%

Source: Tourism Economics

Wicomico County direct employment timeline

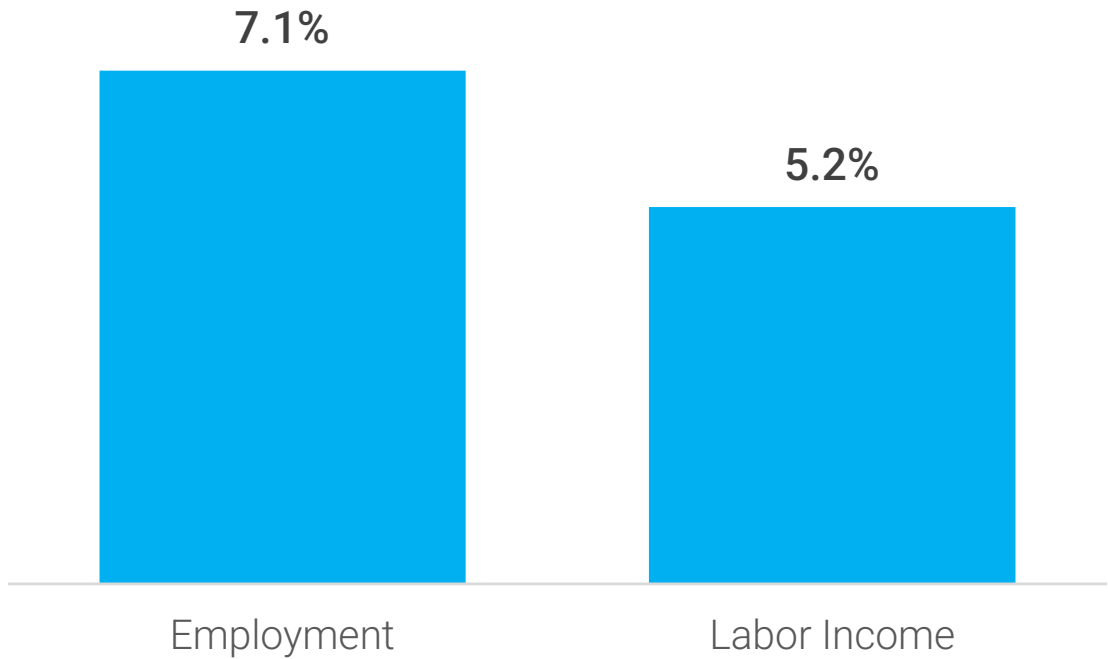
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



Source: BLS, Tourism Economics

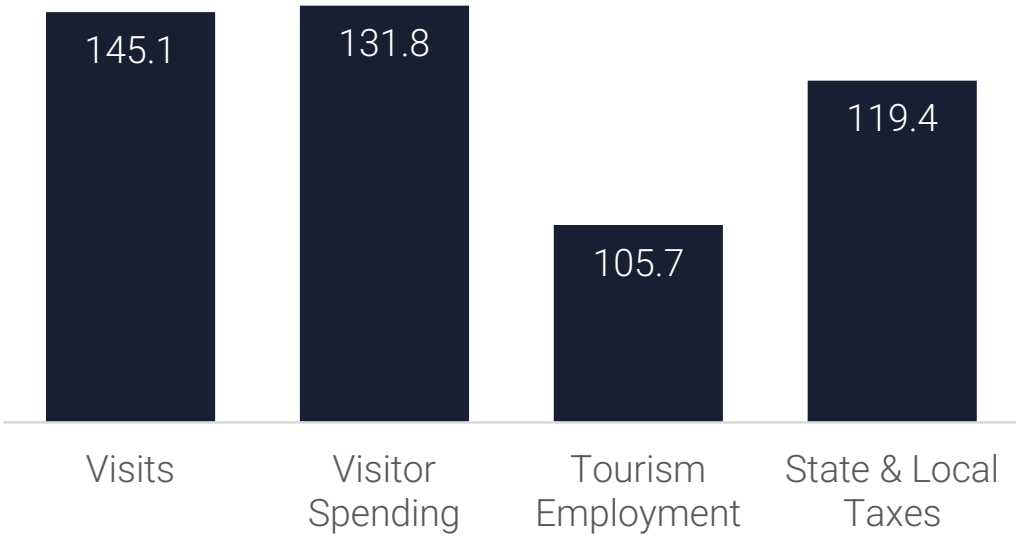


WORCESTER COUNTY HIGHLIGHTS

Highlighted by beach and outdoor attractions, Worcester County has maintained its growth.

Worcester County key indicators

Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Worcester County has grown to 142% of 2019 levels.

Worcester County visitor volume

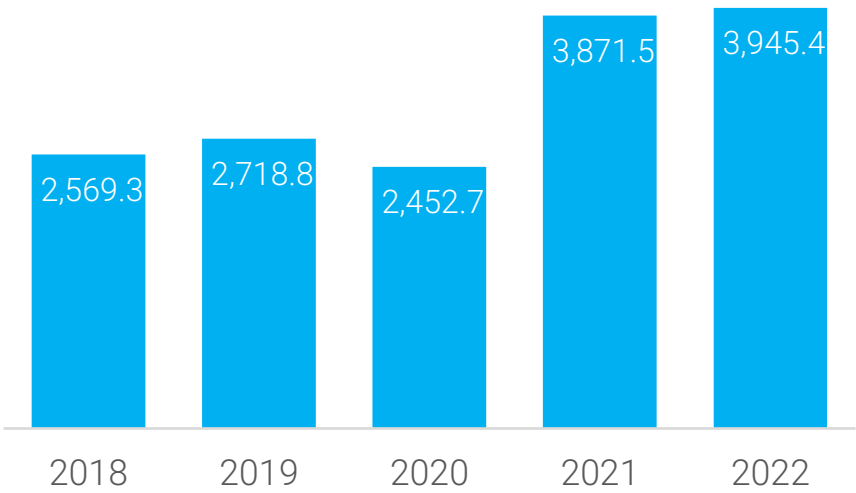
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	1,332.0	1,432.3	1,215.9	1,866.0	1,934.1
Overnight	1,237.3	1,286.5	1,236.8	2,005.5	2,011.3
Total Visitors	2,569.3	2,718.8	2,452.7	3,871.5	3,945.4
Growth rate		5.8%	-9.8%	57.8%	1.9%

Source: D. K. Shifflet, Tourism Economics

Worcester County visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



WORCESTER COUNTY VISITOR SPENDING

Visitor spending grew 5% in Worcester County in 2022, surpassing \$2.5 billion.

Worcester County visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

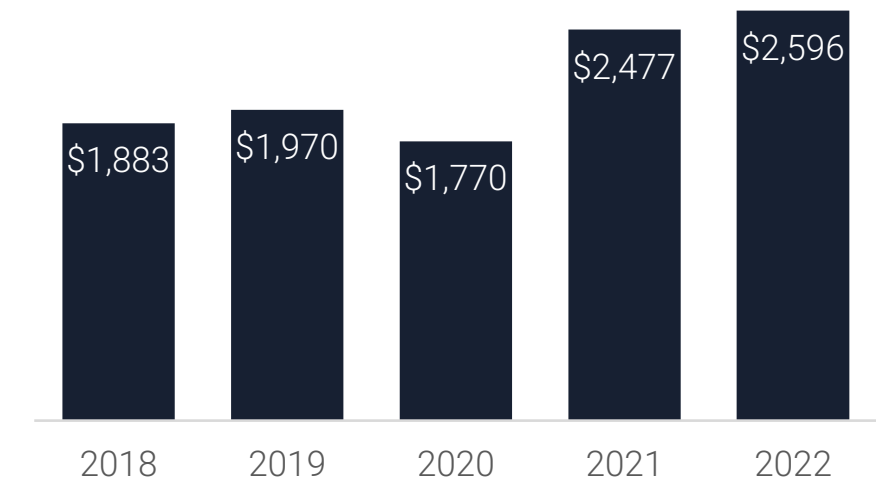
	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$1,883.3	\$1,969.7	\$1,770.2	\$2,476.8	\$2,596.1	4.8%	131.8%
Lodging*	\$700.5	\$735.9	\$664.8	\$904.1	\$933.4	3.2%	126.8%
Food & beverage	\$400.3	\$425.1	\$429.0	\$592.8	\$623.5	5.2%	146.7%
Retail	\$230.5	\$238.5	\$233.5	\$305.1	\$319.9	4.8%	134.1%
Recreation	\$252.9	\$256.0	\$227.4	\$334.0	\$362.6	8.5%	141.6%
Transportation**	\$299.0	\$314.1	\$215.5	\$340.7	\$356.7	4.7%	113.5%

* Lodging includes 2nd home spending
** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Worcester County visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

WORCESTER COUNTY ECONOMIC IMPACTS

More than 15,000 visitor-supported jobs represent the majority of jobs in Worcester County.

Visitor impacts in Worcester County

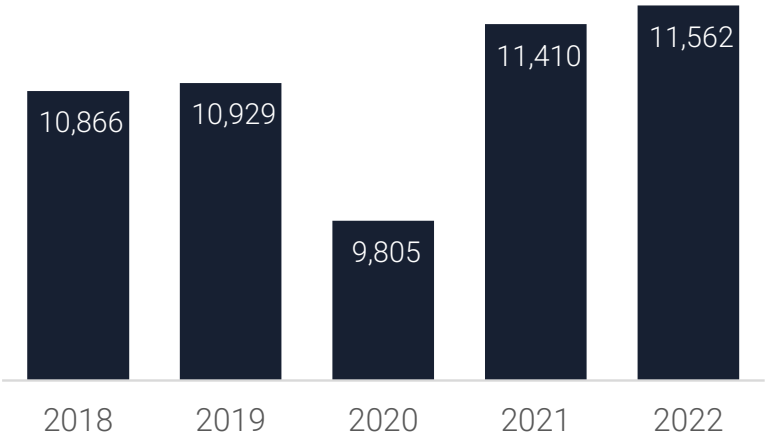
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	10,866	10,929	9,805	11,410	11,562	1.3%	105.8%
Total	14,228	14,329	13,479	15,158	15,151	0.0%	105.7%
Share of State	6.29%	6.33%	8.12%	8.73%	8.09%		
Labor Income							
Direct	\$368.0	\$381.1	\$374.9	\$472.9	\$489.3	3.5%	128.4%
Total	\$573.5	\$594.9	\$615.2	\$737.9	\$743.6	0.8%	125.0%
Share of State	5.56%	5.60%	7.60%	8.45%	7.68%		
Tax revenues							
Federal	\$138.5	\$143.7	\$132.7	\$164.0	\$168.8	3.0%	117.5%
State & Local	\$228.0	\$239.0	\$232.4	\$280.9	\$285.4	1.6%	119.4%
Hotel	\$16.9	\$18.2	\$16.0	\$25.1	\$27.2	8.5%	149.8%
Total	\$383.4	\$400.9	\$381.1	\$470.0	\$481.4	2.4%	120.1%

Source: Tourism Economics

Worcester County direct employment timeline

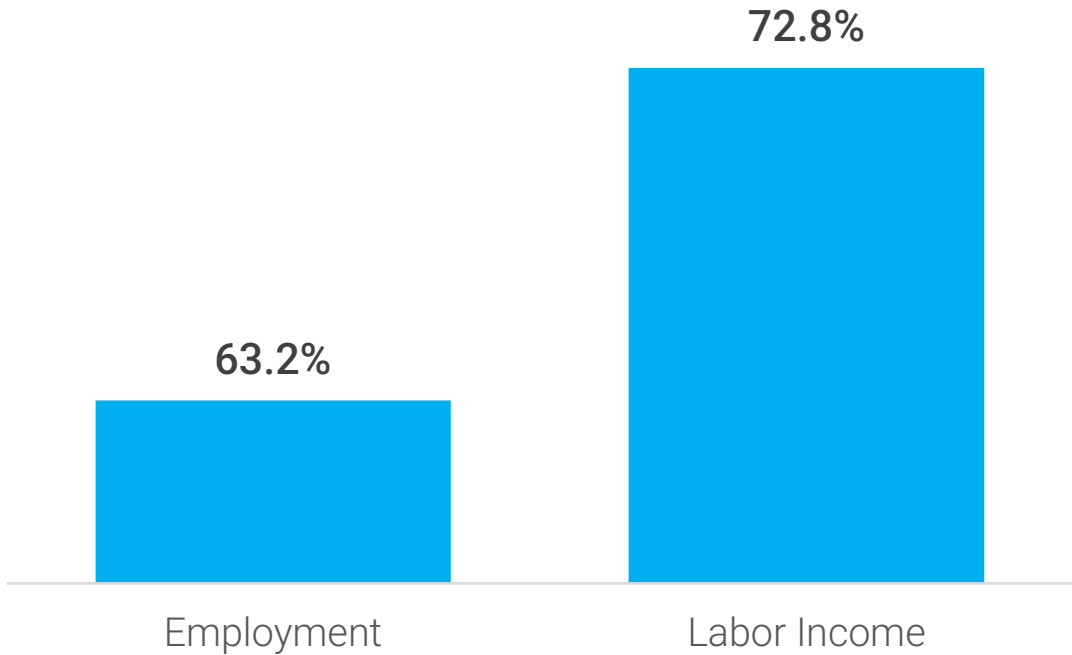
Amounts in jobs



Source: Tourism Economics

Tourism share of county economy

Tourism share of payroll employment and income



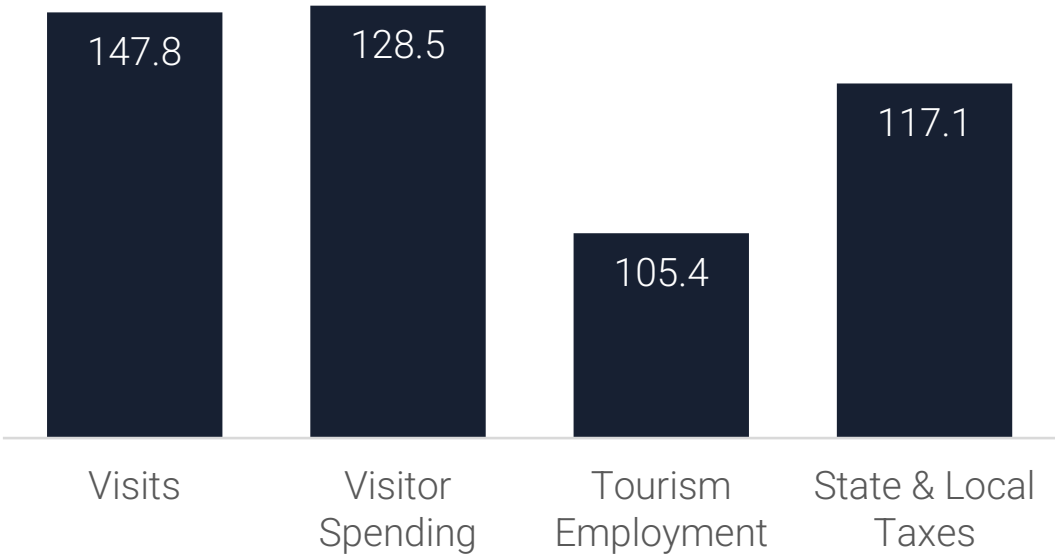
Source: BLS, Tourism Economics



OCEAN CITY HIGHLIGHTS

All key indicators maintained above 2019 levels in Ocean City in 2022.

Ocean City key indicators
Comparison of 2022 with 2019 data, 2019=100



Source: D. K. Shifflet, Tourism Economics

VISITOR VOLUME

Visitor volume in 2022 in Ocean City has grown to nearly 150% of 2019 levels.

Ocean City visitor volume

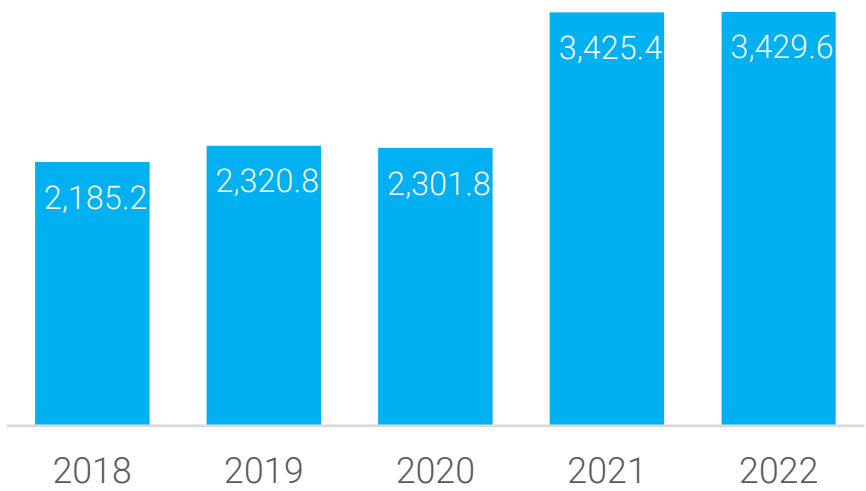
Amounts in thousands of visitors

	2018	2019	2020	2021	2022
Visitors					
Day	1,154.1	1,234.0	1,183.9	1,817.5	1,869.9
Overnight	1,031.1	1,086.8	1,117.9	1,607.9	1,559.7
Total Visitors	2,185.2	2,320.8	2,301.8	3,425.4	3,429.6
Growth rate		6.2%	-0.8%	48.8%	0.1%

Source: D. K. Shifflet, Tourism Economics

Ocean City visitor volume

Amounts in thousands of visitors



Source: D. K. Shifflet, Tourism Economics



OCEAN CITY VISITOR SPENDING

Visitor spending grew 5% in Ocean City to reach \$2.3 billion in 2022.

Ocean City visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$1,675.2	\$1,751.9	\$1,538.5	\$2,149.3	\$2,251.8	4.8%	128.5%
Lodging*	\$659.0	\$692.2	\$613.6	\$833.6	\$860.7	3.2%	124.3%
Food & beverage	\$342.1	\$363.3	\$355.6	\$491.3	\$516.8	5.2%	142.2%
Retail	\$203.4	\$210.5	\$199.1	\$260.2	\$272.8	4.8%	129.6%
Recreation	\$221.1	\$223.8	\$192.1	\$282.1	\$306.2	8.5%	136.8%
Transportation**	\$249.6	\$262.2	\$178.1	\$282.0	\$295.3	4.7%	112.6%

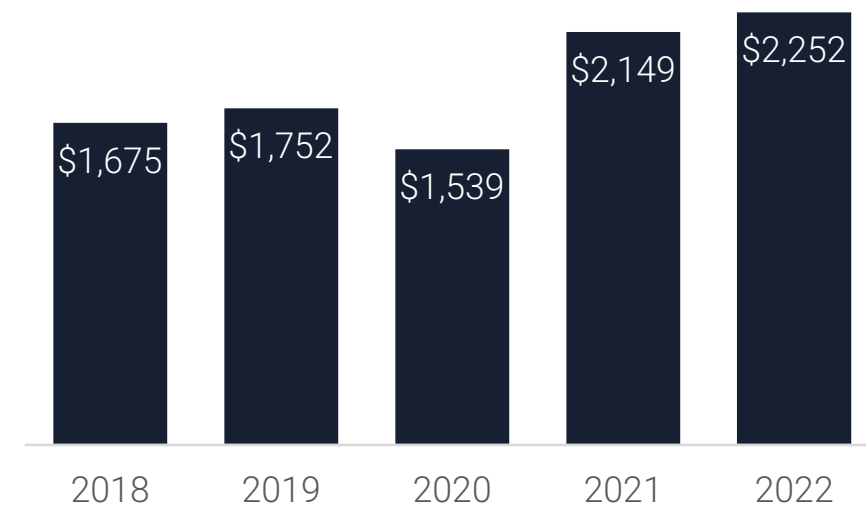
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: D. K. Shifflet, Tourism Economics

Ocean City visitor spending

Amounts in \$ millions



Source: D. K. Shifflet, Tourism Economics

Visitor spending by category

Percent of total



Source: D. K. Shifflet, Tourism Economics

OCEAN CITY ECONOMIC IMPACTS

Ocean City visitors supported more than 13,200 jobs and provided \$246 million to state and local governments, an increase of \$3 million.

Visitor impacts in Ocean City

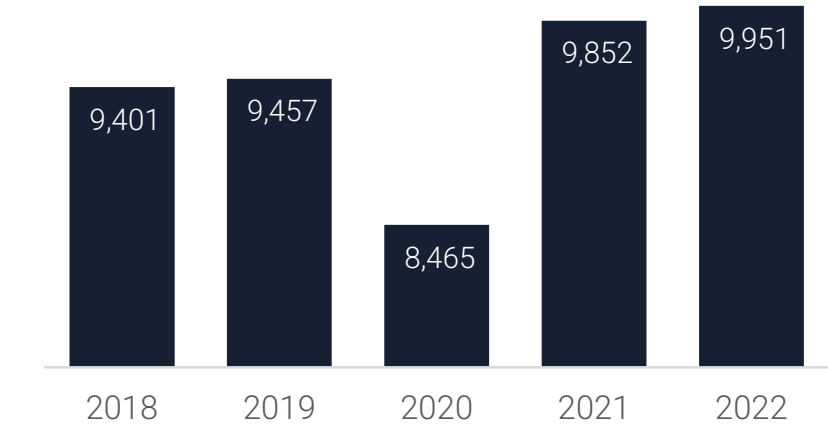
Employment in units, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Direct	9,401	9,457	8,465	9,852	9,951	1.0%	105.2%
Total	12,383	12,512	11,720	13,221	13,183	-0.3%	105.4%
Share of State	5.47%	5.53%	7.06%	7.61%	7.04%		
Labor Income							
Direct	\$316.7	\$327.4	\$320.5	\$407.6	\$421.1	3.3%	128.6%
Total	\$431.2	\$446.6	\$454.4	\$555.2	\$562.8	1.4%	126.0%
Share of State	4.18%	4.20%	5.61%	6.36%	5.81%		
Tax revenues							
Federal	\$109.2	\$113.2	\$102.6	\$128.0	\$132.2	3.3%	116.8%
State & Local	\$200.8	\$210.5	\$201.4	\$242.8	\$246.5	1.5%	117.1%
Hotel	\$15.9	\$17.0	\$14.7	\$23.3	\$25.3	8.7%	148.7%
Total	\$325.9	\$340.7	\$318.7	\$394.1	\$404.0	2.5%	118.6%

Source: Tourism Economics

Ocean City direct employment timeline

Amounts in jobs



Source: Tourism Economics

Glossary – Spending Definitions

Term	Description
Lodging	Includes visitor spending in the accommodation sub-sector. This includes food and other services provided by hotels, rentals and similar establishments.
Food and beverage	Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.
Recreation	Includes visitor spending within the arts, entertainment and recreation sub-sector.
Shopping	Includes visitor spending in all retail sub-sectors within the local economy.
Local transport	Includes visitor spending on local transport services such as taxis, limos, trains, rental cars, buses, and the local share of air transportation spending.
Service stations	Visitor spending on gasoline.
Second homes	Where applicable, spending associated with the upkeep of seasonal second homes for recreational use as defined by the Census Bureau.

Glossary – Economic Impact Definitions

Term	Description
Direct Impact	Impacts (business sales, jobs, income, and taxes) created directly from spending by visitors to a destination within a discreet group of tourism-related sectors (e.g. recreation, transportation, lodging).
Indirect Impact	Impacts created from purchase of goods and services used as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected tourism-related sectors (i.e. economic effects stemming from business-to-business purchases in the supply chain).
Induced Impact	Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor spending.
Employment	Jobs directly and indirectly supported by visitor activity (includes part-time and seasonal work). One job is defined as one person working at least one hour per week for fifty weeks during the calendar year.
Labor income	Income (wages, salaries, proprietor income and benefits) supported by visitor spending.
Value Added (GDP)	The economic enhancement a company gives its products or services before offering them to customers.
Local Taxes	City and County taxes generated by visitor spending. This includes any local sales, income, bed, usage fees, licenses and other revenues streams of local governmental authorities – from transportation to sanitation to general government.
State Taxes	State tax revenues generated by visitor spending. This will include sales, income, corporate, usage fees and other assessments of state governments.

ABOUT TOURISM ECONOMICS

Tourism Economics is an Oxford Economics company with a singular objective: combine an understanding of the travel sector with proven economic tools to answer the most important questions facing our clients. More than 500 companies, associations, and destination work with Tourism Economics every year as a research partner. We bring decades of experience to every engagement to help our clients make better marketing, investment, and policy decisions. Our team of highly-specialized economists deliver:

- Global travel data-sets with the broadest set of country, state, and city coverage available
- Travel forecasts that are directly linked to the economic and demographic outlook for origins and destinations
- Economic impact analysis that highlights the value of visitors, events, developments, and industry segments
- Policy analysis that informs critical funding, taxation, and travel facilitation decisions
- Market assessments that define market allocation and investment decisions

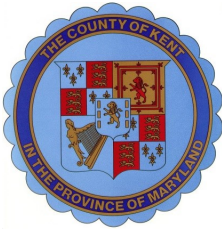
Tourism Economics operates out of regional headquarters in Philadelphia and Oxford, with offices in Belfast, London, Frankfurt, Ontario, and Sydney.

Oxford Economics is one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC, we employ over 400 full-time staff, including 300 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists.

For more information:

admin@tourismeconomics.com





Jim Miller, Director, Human Resources
12/19/2023
County Commissioners Meeting

Item Summary:

Modification to Department of Planning, Housing & Zoning Staff Duties

ATTACHMENTS:

Description

Job Description - Associate Planner

Job Description - Planning Specialist

KENT COUNTY GOVERNMENT

Job Description

Job Title: Associate Planner	Grade: 7
Department: Planning, Housing, and Zoning	FLSA Status: Exempt
Revised Date: 03/23/2021	Approved Date:

Job Summary: This is professional level work directly serving the general public and government agencies including federal, State, and local jurisdictions. The primary duty of the Associate Planner is to work in a multi-disciplinary setting and conduct all aspects of land use, zoning, and planning efforts for Kent County.

Essential Functions

Functions listed are intended only as illustrations of the various types of work performed. The omission of specific duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.

- Reviews and is responsible for development applications and building permits regarding their consistency with the adopted Comprehensive Plan and Land Use Ordinance including impacts on the environment, quality of site design, architecture, compatibility with neighboring uses, planning principles, availability, and capacity of public facilities to include water, sewer, and transportation.
- Facilitates the interagency review process and ensures projects are in compliance with requirements, criteria, standards, and issues and review comments are addressed prior to approval, including advertising, mailings, postings, etc.
- Initiates actions necessary to correct deficiencies in applications and building permits as well as correct violations of regulations in coordination with the County Code Enforcement work group.
- Works with applicants and their agents to resolve issues; identifies problems, formulates solutions, and implements actions to address problems and issues identified independently in the environs.
- Conducts significant and extensive research, including policy and County and State legislation.
- Reviews and analyzes proposals for zoning text amendments, applications for Special Exception, and Variances; generates comments; and prepares staff reports for Planning Commission and the Board of Appeals; and other Boards as assigned.
- Serves as Executive Secretary to the Agriculture Advisory Commission (AAC).
- Acquires and maintains a thorough familiarity of State and Federal wetlands protection programs and the administration of the programs; assists in the administration and enforcement of the County's natural resource protection standards; refers matters to State agencies as appropriate.
- Monitors and provides grants assistance for the County's Watershed Implementation Plan (WIP).
- Participates in project review under the National Flood Insurance Program; participates on local committees who coordinate outcomes with state and federal requirements, including Watershed Implementation Plan and Total Maximum Daily Load drafting and reporting requirements.
- Serves as County's representative to the Maryland Heritage Areas Authority (MHAA), the Eastern Shore's Stories of the Chesapeake Heritage Area program, Eastern Shore Climate Adaptation Partnership (ESCAP), and the Chesapeake Country National Scenic Byway.
- Prepares and issues RFP's; manages the consultant, the project and the budget; also staffs citizen committees; schedules and conducts meetings with developers and the general public.
- Serves on various task forces and committees. Serves as the County's liaison and representative.
- Negotiates effectively with developers, property owners and other participants in the development review process on project specific issues.
- Consults with County attorneys regarding land use legal issues and applies information obtained.
- Serves as a Planning Director's designee as Hearing Examiner for Special Exceptions or Variances.

- Assists in the drafting of Land Use Ordinance and Comprehensive Plan updates.
 - Performs other duties as required.
-

Supervision: The position reports to the Deputy Director of Planning. Position does not supervise staff.

Required Knowledge, Skills, and Abilities

The employee is expected to perform or possess the following:

- **Problem Solving:** Anticipates problems; sees how a problem and its solution will affect other areas; gathers information before making decisions; weighs alternatives against objectives and arrives at reasonable decisions.
 - **Attention to Detail:** Is alert; follows detailed procedures and ensures accuracy; carefully monitors plans or processes; concentrates on routine work details. Recognizes and accurately evaluates the signs of a problem; and handles the problem accordingly.
 - **Analytical Skill:** Ability to diagnose complex problems and break them down into the lowest common denominators to solve.
 - **Customer Service:** Ability to assist and support constituents in a timely and pleasing manner.
 - **Flexibility:** Adapts well to changing priorities, deadlines, and directions; works to eliminate all processes which do not add value; is willing to take action, even under pressure, criticism or tight deadlines; takes informed risks.
 - **Technical Skill:** Ability to understand legal aspects of land use planning and zoning. Familiar with general agricultural related land use issues, soil conservation practices, storm water management, public water and sewer, on-site well and septic systems. Ability conduct research, read and interpret ordinances and structures. Working knowledge of wetland regulations, the State Forest Conservation Act, historic preservation and architecture, the Secretary of Interior's Standards for Historic Rehabilitation, various tax credit programs, landscape architecture, as well as land preservation and conservation programs. Ability to draft legislation such as land use regulations for adoption as part of the County Code.
 - **Responsiveness:** Responds to requests for service in a timely and thorough manner; does what is necessary to ensure customer satisfaction; prioritizes customer needs.
 - **Project Management:** Ability to handle a variety of projects with conflicting deadlines and needs.
 - **Communication and Persuasion:** Ability to communicate with non-technical and technical end users, to gain cooperation and understanding of technical ideas and systems and project scopes. Ability to produce well written and well thought out documents for constituents use.
 - **Computer Related Skills:** Ability to work with MS Office and database packages.
-

Education and Experience:

- Master's Degree in planning, urban planning, landscape architecture, public administration, or a related field is required.
 - Two years of experience in local planning and zoning, or three years related experience.
 - Or equivalent technical training, education, or experience.
 - Valid Maryland Driver's License and an acceptable motor vehicle record.
 - AICP (American Institute of Certified Planners) preferred.
-

Physical and Environmental Conditions:

Work is conducted in an office setting with comfortable lighting, temperature, and air conditions. The position occasionally requires stooping or bending. Occasional very light lifting, such as three or four reams of paper, books, or other materials (up to 20 pounds) may be required.

Work environment involves everyday risks or discomforts which require normal safety precautions typical of such places as offices or meeting rooms, e.g. use of safe work place practices with office equipment, and/or avoidance of trips and falls and observance of fire regulations. Occasional outdoor weather conditions may include exposure to varied weather conditions. There may be some exposure to hazards on building sites that occasionally expose the employee to high, precarious places and risk of electrical shock. Precautions similar to those taken on a construction site should be observed in these instances.

The above job description is not intended as, nor should it be construed as, exhaustive of all responsibilities, skills, efforts, or working conditions associated with this job.

This and all County positions are subject to transfer, based on need.

Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions of this job.

I have read and understand this job description.

Employee Signature

Date

KENT COUNTY GOVERNMENT
Job Description

Job Title: Planning Specialist

Grade:4

Department: Planning, Housing, & Zoning

FLSA_Status: Non-Exempt

Revised Date: 12/17/19

Approved Date: 9/16/2015

Job Summary: The primary duty of the Planning Specialist (PH&Z) is to assist the public with projects, permits and land/property information.

Essential Functions

- Assists (front office) team with answering telephones for the Planning department and assists customers with questions pertaining to building permits, property information and electrical/plumbing licensing.
 - Prepares project materials for the Technical Advisory Committee; distributes correspondence to the applicants and/or the applicant's representative.
 - Assists the Planners with updating and managing project files.
 - Reviews all application submittals for completeness, notifies the adjacent property owners and other interested parties via letter, public notice, and/or property posting.
 - Schedules Planning Commission, Board of Appeals, and Administrative hearings; prepares and distributes the agendas and meeting packets, clerks the meetings (day and evening), prepares meeting minutes for Director and Planning Staff review, and mails decision letters.
 - Sets up meeting room logistics for hearings and meetings.
 - Assists the front office team with building permit intake (in the absence of the permit specialist and/or when the outer office is extremely busy), assessing the fees, and entering the information into the permit database.
 - Performs other duties as required.
-

Supervision: The position reports to the Office Manager. Position does not supervise staff.

Required Knowledge, Skills, and Abilities

The employee is expected to perform or possess the following:

- Communication and Persuasion: Ability to communicate with end users, to gain cooperation and understanding of programs and processes.
- Customer Service: Ability to assist and support constituents in a timely and pleasing manner.
- Analytical Thinking: Ability to think things through from an analytical perspective.
- Detail Orientation: Ability to update information for users as it relates to instructions and directions, which are clear and concise and easy to understand.
- Flexibility: Ability to deal with complex and varied work, requiring a complete knowledge of a wide variety of operations and practices consistently using independent judgment.

- **Technical Skills:** Ability to understand department processes and apply them accurately and in a consistent manner.
- **Decision Making:** Ability to exercise strong decision making and good judgement as decisions made impact the department and County residents.
- **Computer Related Skills:** Ability to work with MS Office and other software packages, including basic internet use.

Education and Experience:

- Requires an Associate degree.
- Two years relevant experience.
- Or equivalent technical training, education or experience.

Physical and Environmental Conditions:

Work is conducted in an office setting with comfortable lighting, temperature and air conditions. The position occasionally requires stooping or bending. Occasional very light lifting, such as three or four reams of paper, books, or other materials (up to 20 pounds) may be required.

Work environment involves everyday risks or discomforts which require normal safety precautions typical of such places as offices or meeting rooms, e.g. use of safe workplace practices with office equipment, and/or avoidance of trips and falls and observance of fire regulations.

The above job description is not intended as, nor should it be construed as, exhaustive of all responsibilities, skills, efforts, or working conditions associated with this job.

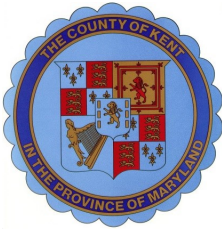
This and all County positions are subject to transfer, based on need.

Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions of this job.

I have read and understand this job description.

Employee Signature

Date



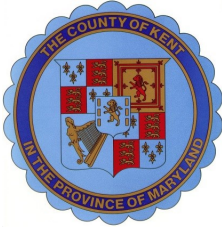
Jim Miller, Director, Human Resources
12/19/2023
County Commissioners Meeting

Item Summary:

Teleworking Policy

ATTACHMENTS:

Description



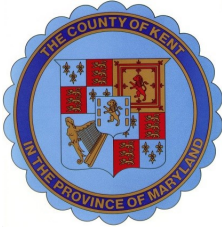
Jay Silcox, President, Kent County Library Board of Trustees
12/19/2023
County Commissioners Meeting

Item Summary:

Kent County Library Board of Trustees

ATTACHMENTS:

Description



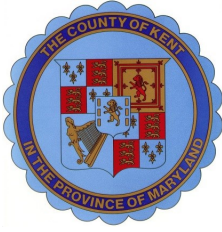
Jill Coleman, Director, Parks and Recreation
12/19/2023
County Commissioners Meeting

Item Summary:

Kent County Parks and Recreation Advisory Board (PRAB)

ATTACHMENTS:

Description



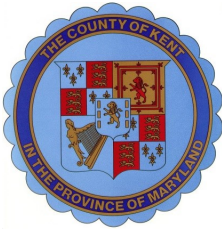
Ashley Albia, Treasury Accountant, Office of Finance
12/19/2023
County Commissioners Meeting

Item Summary:

State Fiscal Year 2025, State Aid For Police Protection (SAPP) Fund

ATTACHMENTS:

Description



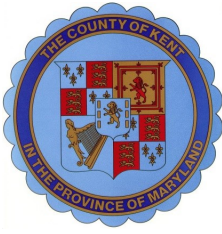
Agricultural Advisory Commission 12/19/2023 County Commissioners Meeting

Item Summary:

Member Appointments

ATTACHMENTS:

Description



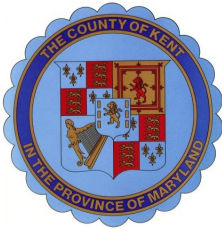
**Zoning Appeals Board
12/19/2023
County Commissioners Meeting**

Item Summary:

Member Appointments

ATTACHMENTS:

Description



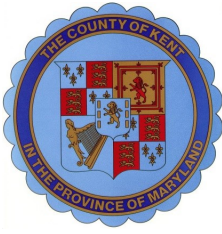
Historic Preservation Commission 12/19/2023 County Commissioners Meeting

Item Summary:

Member Appointments

ATTACHMENTS:

Description



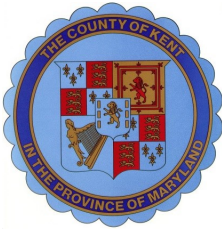
Planning Commission
12/19/2023
County Commissioners Meeting

Item Summary:

Member Appointments

ATTACHMENTS:

Description



Procedures For Public Comment 12/19/2023 County Commissioners Meeting

ATTACHMENTS:

Description

Press and Public Comments

Press and Public Comments

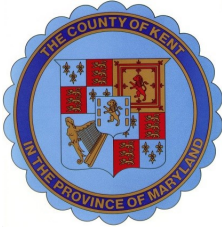
Time is allotted at the beginning and end of each meeting for the Commissioners to receive comments from the public. Anyone interested in speaking must sign up on the provided The Public Comment sign-up sheet is located on the table inside the meeting room.

The President of the Board will call the names of the listed individuals when it is time to speak. When making comments, individuals are asked to speak slowly, clearly, and concisely. Precede all comments with your name and address and speak only on the subject under discussion.

Comments in writing are welcomed and should be given to the staff after your presentation. Any person making personal, impertinent, or slanderous remarks, or whose speech or actions become disruptive, will be asked to leave the meeting.

Interested parties may address the Commissioners in writing at any time about any matter pertaining to County business. Written statements can be hand-delivered or mailed to:

The County Commissioners of Kent County, Maryland
400 High Street
Chestertown, MD 21620



Maryland Department of the Environment 12/19/2023 County Commissioners Meeting

Item Summary:

Notice of Water Appropriation and Use Permit Issued

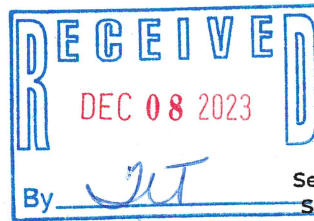
ATTACHMENTS:

Description

12.19.23 Maryland Department of the Environment Water Appropriation and Use Permit KE2021G001(01)



Maryland
Department of
the Environment



Wes Moore, Governor
Aruna Miller, Lt. Governor

Serena McIlwain, Secretary Designate
Suzanne E. Dorsey, Deputy Secretary

December 5, 2023

**RE: Water Appropriation and Use Permit No.: KE2021G001(01)
Publication of Permit Decision**

Dear Property Owner, Public Official, Interested Person or Applicant:

On November 20, 2023, the Water and Science Administration (Administration) issued Water Appropriation and Use Permit No. KE2021G001(01) to Harborview Farms Partnership to appropriate and use an annual average of 258,500 gallons of water per day (gpd) and an average of 1,571,000 gpd during the month of maximum use for crop irrigation. Water is to be withdrawn from up to eight wells in the Aquia aquifer. The site is located on the east side of Airy Hill Road, approximately 0.5 mile south of its intersection with Chestertown Road, Chestertown, Kent County, Maryland.

After examination and consideration of the documents received and evidence in the application file and record, the Administration has determined that the application meets the statutory and regulatory criteria necessary for issuance of a Water Appropriation and Use Permit. The Impact Analysis Summary used in reaching this determination is enclosed with this permit decision, as is the Water Supply Program's response to comments received on the application. A copy of Water Appropriation and Use Permit No. KE2021G001(01) is available upon request.

This is a final agency determination; there is no further opportunity for administrative review. The applicant or any person with standing who participated in the public participation process through the submission of written or oral comments may petition for judicial review in the Circuit Court in the County where the permitted activity is to occur. The petition for judicial review must be filed within 30 days of the publication of the permit decision. Please see the attached fact sheet for additional information about the judicial review process.

If you have any questions or need any additional information, please do not hesitate to contact me at (410) 537-3590.

Sincerely,

Robert Peoples
Water Supply Program

Enclosures

Harborview Farms Partnership
(Name of Applicant)

KE2021G001/01
(Application No.)

John J. Anthony
(Assigned WSA Project Manager)

October 16, 2023
(Date Form Completed)

IMPACT ANALYSIS SUMMARY

I. REASONABLENESS OF THE AMOUNT OF WATER REQUESTED IN RELATION TO THE ANTICIPATED LEVEL OF USE DURING THE PERMIT PERIOD.

The applicant requests to appropriate and use an annual average of 258,500 gallons of groundwater per day (gpd) and 1,571,000 gpd during the month of maximum use for crop irrigation. Water will be withdrawn from up to eight wells in the Aquia aquifer. Water demand is based on the type of crops to be irrigated, irrigated acreage, soil type(s), and type of irrigation system to be used. The applicant requests to irrigate approximately 258 acres of grain corn (water demand = 11.7 inches) in silt loam soil, using a low-pressure center pivot system, with a water loss factor of 15 percent. The proposed quantities are reasonable for the requested use.

II. REASONABLENESS OF THE IMPACT OF THE REQUESTED WITHDRAWAL ON THE RESOURCE.

Based on information from Maryland Geological Survey Report of Investigation No. 68, the Aquifer Information System (AIS), and on-site well logs, it was determined that the surficial aquifer and the Aquia aquifer form one unconfined hydrologic unit in the area. The impact of the requested withdrawal on a water table (unconfined) aquifer like the Aquia is based on the annual rainfall (47.4 inches, PRISM) that falls in the area, the amount of recharge (infiltration) on the applicant's property during a drought year, and the amount of groundwater set aside to maintain stream baseflow. In addition, 15% of the irrigation water which is not used by crops infiltrates back into the aquifer. Based on the factors above, the Administration's analysis indicates that the long-term consumptive use of the proposed withdrawal is 51% of the drought year recharge available at the site. Hence the proposed withdrawal from the Aquia aquifer is sustainable. No unreasonable impact to the resource is expected.

III. REASONABLENESS OF THE IMPACT OF THE REQUESTED WITHDRAWAL ON OTHER USERS OF THE RESOURCE.

The wells will be drilled to a depth of approximately 132 feet. Impacts due to the withdrawal were evaluated using data from geological reports and investigations available to the Water and Science Administration and from data collected during an on-site aquifer test conducted on the property in July of 2022. Projections of aquifer drawdown were developed using a transmissivity of 1,060 ft²/day and storage coefficient of 0.01. Pumping the wells at the maximum rate of 1,571,000 gpd for 60 days with no recharge to the aquifer produces a drawdown of about 19 feet at the closest domestic well (about 2,300 feet away). A review of the State's well database for wells in this area was conducted. There are approximately 483 wells in the vicinity drilled in the Aquia aquifer within an approximately two-mile radius. Three hundred eighteen wells are for domestic use, seven are for farm use, seven are municipal supply wells, seventeen are industrial wells, and 133 are test wells. The applicant will be responsible for mitigating impacts to domestic wells in the area should an investigation determine the well impacts are a direct result of lowered water levels caused by the applicant's pumping.

MARYLAND DEPARTMENT OF THE ENVIRONMENT
WATER AND SCIENCE ADMINISTRATION
WATER SUPPLY PROGRAM
RESPONSE TO COMMENTS RECEIVED
IN THE MATTER OF:

Water Appropriation and Use Permit Application No: KE2021G001/01
Harborview Farms Partnership

HEARING DATE: May 17, 2023

End of Public Comment Period: May 24, 2023

The above referenced project is located on the east side of Airy Hill Road, 0.5 miles southeast of its intersection with Chestertown Road (High Street), Kent County, Maryland. The Maryland Department of the Environment, Water Supply Program (WSP) received an application from Harborview Farms Partnership (the Applicant) for a permit to appropriate and use groundwater for crop irrigation. The application was received on July 16, 2021. On November 24, 2021, test well information was submitted. On December 15, 2021, the Applicant received a package of instructions informing them of the additional steps needed to complete their application. By December 28, 2021, the Applicant had submitted all the information needed to complete the application. On January 25, 2022, subsequent to the notification of contiguous property owners of the project by the Applicant, the application materials were sent to the public upon formal request. On July 26, 2022, a voluntary 24-hour aquifer test was completed in support of the application. On March 30, 2023, the project was advertised in the Kent News inviting public comment and or requests for a public informational hearing. The WSP received requests for a public informational hearing on the application by April 14, 2023, which was the deadline for comments or requests. On May 2, 2023, a public information hearing notice was mailed to interested parties. The notice stated that a public informational hearing would be held at Washington College in the Toll Science Center at 5 PM on May 17, 2023, in Chestertown, Maryland. The notice also indicated that comments could be provided at the informational hearing. The informational hearing was held as scheduled with approximately 50 persons in attendance.

At the hearing, the WSP Project Manager, Mr. John Anthony, made a presentation explaining how the Applicant's request for an appropriation of water was evaluated. Maryland law allows property owners a reasonable use of water for the requested purpose, if the use does not cause unreasonable impacts to other users, and if the resource is able to sustain the request. Mr. Anthony explained how the water demand was calculated, how the source of water (Aquia aquifer) was identified, and how the use of water would impact water levels in the aquifer in the region of the withdrawal. He also identified the projected drop in water levels during periods of maximum use at the nearest user in the Aquia aquifer. Mr. Anthony explained that the Aquia aquifer in this area functions as an unconfined aquifer, presented figures showing the recharge process, and quantified the sustainability of the request through a water balance analysis. It was concluded that the quantity of water needed for the Applicant's crop irrigation was reasonable, that the Aquia aquifer could sustain the requested withdrawal, and that any impacts projected to occur to nearby wells were not unreasonable given appropriate permit conditions.

At the conclusion of the presentation, participants were invited to make statements and ask questions. Some questions were previously provided in writing to the WSP, and the answers were discussed during

the hearing. The primary question raised was how the use might affect individual domestic wells in the region and who would be financially responsible for addressing an adverse impact due to the proposed withdrawal. The Hearing Officer and Mr. Anthony provided the Department's position on those questions. The hearing audio was recorded. The comment period remained open until May 24, 2023. A summary of the WSP's technical analysis is contained in the Impact Analysis Summary, which is enclosed with the Final Permit Decision letter, a separate document. This document will briefly summarize the responses to the major questions raised before, during, and after the hearing and will address the written comments received.

Summary of written and oral comments/questions and the Program's responses:

1. *Question:* Who would be responsible should a domestic well be impacted and what is the procedure should an issue occur?

Response: The WSP is committed to ensuring that any large user of water does not adversely impact domestic supplies. Special conditions will be written into any approved permit in order to protect private domestic users in the area. Loss of water from a private well can be the result of a number of factors including: natural iron clogging, electrical failure, pressure tank failure, pump failure or lowered water levels. Therefore, if a homeowner experiences a well yield problem, they should first contact a licensed well driller or plumber to determine the cause of the water loss. If the loss of water is attributed to lowered water levels in the well, then the WSP's Source Protection and Water Appropriation Division should be contacted immediately. The phone number is 410-537-3590. Information that will be requested by the WSP includes: the well location and tag number, the date(s) of occurrence, the measured level of water in the well by the well driller and/or plumber you have contacted, the date of the water level measurement and well completion information. The WSP will follow-up the complaint and will conduct an investigation in order to make a determination as to whether any large nearby users are contributing to the drop in water levels. If this investigation determines that a large nearby user(s) is causing the drop in water level resulting in loss of well yield, the permitted user will be directed to reduce or cease water use and provide bottled water or an alternative source of water to the affected homeowner immediately. The permittee must cease water use until the replacement source of drinking water has been provided to the affected homeowner. The Applicant has agreed to cover the cost of well repair, replacement, or any other damages which are the direct result of lowered water levels in the well should the WSP investigation determine the initial loss of well yield is a result of the permitted users pumping.

The Aquia aquifer is one of the most productive aquifers in Kent County. While the Aquia aquifer is used extensively for irrigation in Kent County, such uses have not resulted in unreasonable impacts to other individuals utilizing drilled wells with submersible pumps. The water level drawdown analysis performed by the WSP assumes the continuous use of water at the maximum rates for 60 consecutive days with no rainfall. Irrigation water use is normally for a few days at a time with periods of rest between. During periods of rest, aquifer water levels recover back to pre-pumping levels. Thus, it is unlikely that the modeled drawdown projections would be fully reached due to the intermittent usage patterns.

2. *Pre-hearing Question:* What are the permit conditions that will be written into the final permit to protect homeowners?

Response: At least two special conditions will be written into any approved final permit to protect homeowners. The first is a “well setback” condition which will limit the ability of the applicant to drill any irrigation wells within 1,400 feet of the Applicant’s western property boundary along Airy Hill Road. The second is an “impacts to wells condition” which will require the permittee to cover the cost of well repair or replacement should an investigation by the WSP determine that the drop in water level resulting in loss of well yield at a homeowner’s domestic well is a direct result of the permittee’s pumping.

3. *Pre-Hearing Question:* Would the ‘guarantees’ and/or permit conditions be transferred?

Response: State Water Appropriation and Use permits have a term of 12-years. Permit conditions typically remain in effect for the full term of the permit, should it remain active. Water Appropriation permits are non-transferable. Should the property be sold to a new landowner or should a major change in water use occur at the property, it would be necessary to submit a new application to the WSP. The Department maintains broad authority to add, modify, or remove permit conditions.

4. *Pre-Hearing Question:* Is a change in water quality anticipated as a result of this water withdrawal?

Response: The withdrawal of water due to the applicant’s pumping under this permit is not expected to directly cause a change water quality in the aquifer. The WSP and the Maryland Geological Survey (MGS) have no documented evidence of water quality changes in the unconfined coastal plain aquifers in Maryland as a result of water level changes from the pumping of large users.

5. *Hearing Question:* Why was the nearby Town wastewater lagoon not considered for irrigation?

Response: There are many factors related to both water quality and quantity that must be considered when utilizing municipal wastewater for spray irrigation on crops. According to the Environmental Protection Agency (EPA), Maryland approved the reuse of reclaimed water for agriculture in areas with restricted access and applicable buffer zones (Maryland DEM, 2010; Maryland DEM, 2016). All applicable provisions of the Clean Water Act (CWA) (33 U.S.C. §§ 1251 et seq.), must be met in order for this use to occur. Additionally, commercial food crop growing operations may be subject to any relevant rule requirements under the Food Safety Modernization Act (FSMA) (124 Stat. 3885). The Applicant has agreed to explore the feasibility of utilizing the wastewater lagoon as a supplemental source of irrigation water should it be legally permissible and economically viable.

6. *Hearing Question:* How does the month of maximum use allocation of 1,571,000 gallons per day (gpd) compare to other agricultural permits in the State of Maryland?

Response: The average during the month of maximum use allocation of 1,571,500 gpd proposed under this permit may be considered typical of the approximately 1,500 agricultural groundwater permits with a water demand > 10,000 gpd currently active in the State. The month of maximum use allocation is determined by taking half of the total allocation and dividing it by 30 days. This is the standard method for all allocations granted for the purpose of crop irrigation.

7. *Hearing Question:* Is the permit allocation "set in stone"? What about if rainfall changes over time?

Response: Water Appropriation permits have a 12-year permit term. At the end of the permit term, a renewal application must be submitted in order for the permit to remain active. During the application renewal process, the application will be re-evaluated using the water balance method which considers National Oceanic and Atmospheric Association (NOAA) 30-year normal precipitation values. Any requested modification to the permitted use, allocation, location, or water source prior to the expiration date would require a new permit application and an updated evaluation. The Department maintains broad authority to add, modify, or remove permit conditions.

8. *Hearing Question:* If a new well requires a conditioning system, is Mr. Hill only required to replace the well or is the conditioning system included?

Response: Should an investigation determine that the loss of well yield at a homeowner's domestic well is the result of lowered water levels due to a permittees pumping, the permittee would be responsible for all costs associated with the complete restoration of the affected persons water supply. A new or retrofitted well shall meet the minimum yield requirements established in COMAR 26.04.04.26 and approval of use requirements established in COMAR 26.04.04.30, and County Environmental Health Department approval.

9. *Hearing Question:* Does Harborview Farms Partnership "waste" water in their agricultural operation?

Response: Agricultural irrigation is considered a beneficial water use. The allocated quantities have been informed by the University of Maryland Cooperative Extension research, "Estimating Irrigation Water Requirements, Fact Sheet 447" by Herbert Brodie, 1990. Per the applicant, Harborview Farms Partnership also deploys moisture sensors in the ground that can guide decisions about when to irrigate the fields so as to not run the irrigation system unnecessarily.

10. *Hearing Questions/Comments:* Questions were raised regarding the need for water level monitoring:

Response: The WSP received various questions and comments around water level monitoring as it relates to the withdrawal. It was presented during the Hearing that the WSP utilizes long-term water level data obtained from the Maryland Geological Survey's (MGS) State-wide Monitoring Well Network to help assess regional groundwater trends and to guide water management decisions. An analysis of the two closest Aquia aquifer monitoring wells in the Network displayed no discernable trends in water levels in the region other than typical seasonal fluctuation. This suggests that the Aquia aquifer is functioning as an unconfined aquifer in the region and is showing no long-term aquifer declines due to groundwater use in the area. While useful, regional water level monitoring networks were not designed to detect and record water level fluctuations due to an individual water user. The withdrawal from Harborview Farms may not be detected in the MGS monitoring wells due to the distance to the wells (2.2 miles). An assessment of local changes to the water table due to an individual user requires monitoring wells in a closer proximity to the withdrawal. The Applicant volunteered to conduct a 24-hr aquifer test at the property in order to obtain site-specific data on how the local aquifer will respond to pumping. Two on-site test wells equipped with data loggers were utilized as monitoring wells, the furthest of which was approximately 900 feet from the pumping well. Data collected on-site was used in models utilizing a multi-Theis analysis to

calculate the long-term (60 day) maximum pumping drawdown models. The maximum drawdown scenarios presented during the Hearing would only be realized if the irrigation system was run continuously for 60 days whereas typical irrigation schedules involve running the system for a few days and then turning the system off for a period of time.

At this time, the WSP will not require additional water level monitoring, however, the permittee will be required to keep the test wells available as monitoring locations. The WSP does not manage the resource to ensure that water levels in the unconfined aquifer always remain at or above a certain level. Water level monitoring is not necessary because the applicant has agreed to pay the costs associated with mitigating any impacted water supplies if the Administration determines the Permittees pumping caused a well failure due to water level declines. A requirement to measure water levels would not provide useful information above what can be obtained from pumping records and a water level measurement from a potentially impacted well. Moreover, any owner of an existing well may choose to do their own water level monitoring.

11. *Hearing Question:* Will there be impacts to the Shore Hospital groundwater remediation site?

Response: The WSP contacted the Oil Control Program (OCP) for their expertise on potential impacts to the Shore Hospital remediation site due to the withdrawal. The OCP is not concerned with the mobilization of petroleum product at the site as a result of changing water levels associated with the withdrawal. Fluctuations of approximately two feet were modeled at the Shore Hospital site during maximum 60-day pumping scenarios. No adverse impacts to the remediation site are anticipated.

12. *Hearing Question:* Will there be impacts to Chestertown's municipal water supply?

Response: The drawdown analysis indicates a groundwater fluctuation of approximately two feet at Chestertown's Aquia aquifer well field during maximum pumping scenarios. No adverse impacts to the Town wells are anticipated.

13. *Hearing Question:* How do I find out the depth of my well?

Response: All wells drilled in Maryland are identified using a unique 'well tag' number which is engraved on a faceplate and affixed directly to the wellhead using a metal band. In Kent County, the number will be in the form of KE-XX-XXXX. The Kent County Health Department can provide homeowners with a copy of their well completion report which will provide basic information on well construction including the depth, construction materials used, static water level at time of drilling, and the lithology of the borehole. Homeowners may also reach out to the WSP for assistance with well completion reports.

14. *Hearing Comment:* Comments were made regarding the public notice procedure:

Response: The WSP followed the requirements and procedures for public participation as outlined in Environment Article § 5-204 for this application. The WSP received certification from the applicant that all contiguous property owners received a notice of the applicant's Water Appropriation and Use Permit application. The WSP program mailed notices to all persons on the interested parties list following our initial review of the application. The WSP ensured that the notice of project was

advertised in the local paper, notice of the hearing was distributed to all members of the interested parties list, and that adequate time was provided prior to the holding of the informational hearing. The WSP ensured that the facility was set up for the hearing in advance. The WSP provided time during the hearing for anyone who wished to make a statement or ask a question to do so. The WSP provided for a comment period following the hearing and indicated that our file was open for review for anyone who wished to come to our offices. The open public comment period allowed adequate time for anyone who could not make the meeting to obtain the information they needed to provide comments.

15. *Hearing Comment:* Why was the unconfined Aquia aquifer selected instead of a deeper aquifer?

Response: It is a policy of the WSP to direct irrigation requests to the surficial, unconfined aquifer in the coastal plain region of Maryland. The sand gravel aquifers of the coastal plain aquifer system are highly permeable beds of unconsolidated sediment that have the capacity to store large quantities of water which may be accessed for drinking, irrigation, and industrial uses. Unconfined aquifers display characteristics that make them suitable for large withdrawals such as rapid response to precipitation events and a less severe response to pumping when compared to confined aquifers. Unconfined aquifers in Maryland generally have fewer issues related to the long-term sustainability of withdrawals.

16. *Hearing Question:* Does the salt water / freshwater interface change in response to pumping?

Response: A high withdrawal rate does not indicate by itself that an aquifer is at risk of saltwater intrusion. Within Maryland's coastal plain, areas close to tidal waters in the shallow unconfined surficial aquifer are at risk to saltwater intrusion if the pressure gradients are reversed from normal so that tidal water recharges the aquifer over a sufficient time period. The risk factors for saltwater intrusion for Maryland's surficial aquifer withdrawals are proximity to salty surface water, a hydraulic gradient toward the withdrawal, and the length of pumping. Since the groundwater and the saltwater-freshwater interface moves slowly, the head-gradient would have to persist over a relatively long period to create an unreasonable risk. Considering the distance of the points of withdrawal to the salty water and that the permittee's withdrawal is seasonal, the change in heads (pressure gradients) are not anticipated to be depressed long enough to contribute to saltwater intrusion because when pumping stops, the heads will return to pre-pumping conditions with discharge from the aquifer toward the salty water, thus creating a flushing effect.

17. *Hearing Question:* Does the application meet the Department's determination for reasonableness?

Response: Water Appropriation permit requests are evaluated using the reasonable use doctrine which states that all property owners have the right to make a reasonable use of the water associated with their property so long as the quantity requested is reasonable, the impact to the resource is reasonable, and the impact to other users of the resource is reasonable. The water quantity requested by the Applicant has been calculated in-house using University of Maryland Ag Extension numbers for crop water demand in a drought-year. The quantities requested are reasonable for the requested use. The long-term sustainability of withdrawal on the aquifer has been evaluated. The withdrawal will not utilize more water than would fall on the property in a drought-year and therefore, no long-term dewatering of the aquifer will occur. The impact to the resource is reasonable. While the WSP recognizes that some risk may exist to shallowly constructed wells in the

area, limiting the drawdown in an area to the shallowest pump setting artificially reduces the amount of water other users in the area are able to use. The Applicant has agreed to cover the costs of well replacement should an investigation by WSP determine that a domestic well issue is the direct result of changing water levels due to the Applicant's pumping. No unreasonable impacts to other users of the aquifer are anticipated.

18. *Hearing Comment:* A few people in attendance expressed support for the application.

Summary of written comments provided to WSP at the Hearing:

19. *Question:* The amount of water to be appropriated is huge considering the size of the farm. In the 2018 Kent County Comprehensive Water and Sewer Plan Table 2-2 Water Supply Evaluation shows that: a. The TOTAL Permitted Flow (GPD) for all 8 towns in Kent County is 1.8 million gallons. The towns are: 1. Chestertown 2. Rock Hall 3. Galena 4. Betterton 5. Millington 6. Kennedyville 7. Worton-Butlertown 8. Fairlee b. The ACTUAL demand for all 8 towns based on 2017 numbers was 1.15 million gallons. c. Harborview Farms is requesting 1.571 million gallons. That's 37% more water per day than was used in all the Kent County towns. d. If all the towns in the county are permitted a max of 1.8 million gallons, how is it that one farm in Kent County is allowed to appropriate 1.571 million gallons? Does that not seem out of balance? In other words, that one farm would consume enough water to support about 5,000 EDUs (households).

Response: The United States Geological Survey (USGS), which has been tracking water use data since 1950, estimates that in the United States approximately 39,000 Mgal/d of water were withdrawn for public supply in 2015 (a decrease of 7% since 2010), while total irrigation withdrawals were 118,000 Mgal/d (an increase in 2% since 2010), which accounted for 42 percent of total freshwater withdrawals. Nationally, more water is pumped annually for irrigation purposes than for public supply. Planning estimates suggest a water demand of approximately 200 gpd/ person for public supply. The water demand for public supply can vary from 100-300 gpd/person depending on application. In Maryland, 749 Mgal/d were withdrawn for public supply in 2015, and irrigation withdrawals were 64 Mgal/d, while in Kent County public supply withdrawals were 1.1 Mgal/d and irrigation withdrawals were 3.8 Mgal/d. (USGS Circular 1441, Summary of Estimated Water Use in the United States in 2015, Dieter et. al).

Water use across the country is highly variable from region to region as water demand and water availability are highly dependent on factors like local geology/hydrology, land use, and economic activities in a given area. The Eastern Shore and greater Delmarva Peninsula rely on groundwater because the availability of the water resource is abundant and economical to obtain.

The WSP utilizes a "water balance" methodology to ensure the long term-sustainability of permitted withdrawals in the unconfined coastal plain region of Maryland. The permitted allocation cannot exceed the anticipated drought-year recharge to the aquifer over the area owned or controlled by the applicant. While groundwater may be removed from storage in the aquifer each year due to increased use during the summer months when recharge rates are lower, the aquifer is not going into a "deficit" over the long-term since less water is being removed from the aquifer than will recharge the aquifer during a drought-year. For further environmental protection, a portion of the calculated drought-year recharge available to the property is set aside for the maintenance of seasonal baseflow of groundwater to local creeks and streams.

20. *Question:* Why does Harborview Farms suddenly require so much water when it has been a successful farm for decades? a. What crops are intended to be farmed that require so much irrigation? b. Is water from any of the 8 wells going to be transported to other places? c. This farm is right in Chestertown. Has the impact of the intense withdrawal of water from the Aquia Aquifer in the dry summer months been assessed?

Response: In 2021, the property changed ownership. The WSP calculated a drought-year water demand for the proposed permit based on the irrigation of grain corn, the most water intensive crop indicated on the application. Agricultural irrigation is considered a beneficial use of water in Maryland, and landowners have the right to make a reasonable use of the water associated with their property. The WSP evaluates the impact of irrigation requests using a 60-day maximum pumping scenario which considers drought-year recharge rates to the aquifer. Should the Applicant irrigate a less water intensive crop such as vegetables for canning, the water demand at the farm will be less during those growing seasons than what is required for grain corn. Regenerative agriculture practices may also reduce water demand at the site. Water may not be transferred off-site or sold.

21. *Question:* Please describe the testing that was done. a. Who did the testing? Some Fannells Meadow residents were listed as contacts for testing, but they were not contacted. b. Was a 'proper aquifer test' done? c. What was the duration of the pumping test? d. When was it done? e. How many wells were pumped?

Response: A.C. Schultes of Delaware performed a 24-hr constant-rate aquifer test on July 26, 2022. It was performed utilizing a set of standard procedures consistent with conducting constant-rate aquifer tests in the field. The test consisted of one 8" pumping well and two 4" monitoring wells equipped with transducers for measuring changes in water level. Measurements were recorded at specific time intervals during the pre-pumping, pumping, and recovery portions of the test. Data was plotted using AQTESOLV and fitted to a type-curve enabling the calculation of site-specific aquifer characteristics which were used to develop the final drawdown model presented during the Hearing. The characteristics derived from the test fall within the range of published data in the area. The data may be obtained from the WSP project file.

22. *Question:* How was it determined that there is a need for eight wells to a depth of 130 feet? The original request was for wells 50 feet deeper. Why was it determined that the depth should be limited to 130 feet?

Response: The number of wells required for irrigation is site-specific and based on many factors including the pumping rate required to run the irrigation system, the specific capacity of wells on site, and the extent of the permeable sands within a given formation. Test wells were drilled and analyzed in order to determine the elevation of the bottom of the formation which is roughly 130' below land surface in this area. The depth of the wells fall within the range of published data for the bottom of the Aquia aquifer in the area.

23. *Question:* Permittee is responsible for the adverse impact to neighboring wells. a. What is the distance to the furthest neighboring wells? b. How is that measured? Is it from the Harborview wells or from the perimeter of the farm? c. Will all wells in Fannells Meadow be covered in the event of adverse impact to these wells? d. Does adverse impact include degradation of water quality? e. Why is there a ¼ mile radius specified? The water drawdown cone can impact an area of about a mile radius. f. Will Harborview Farms Partnership post a bond to cover their potential liability? g. Are you aware that there are 100 1-acre building lots approved contiguous to Airy Hill and John Hanson roads? They will all be on well water. Will they be protected in case of adverse impact to their wells?

Response: The furthest neighboring wells are roughly 1.2 miles (6,300 feet) from the “pumping center”, or region of maximum drawdown, created by the simultaneous pumping of the Applicants eight wells. The closest domestic well is approximately 0.4 miles (2,300 feet) from the pumping center. A distance of ¼ mile radius from the withdrawal was specified in the Kent News advertisement because that is a standard distance from the pumping center that the WSP references for legal ads. Drawdown is greatest at the pumping center and becomes less at distances greater distances from the pumping center. The Applicant has agreed to cover the cost of well repair or replacement should an investigation by WSP determine that the cause of the loss of well yield in a domestic well is due to lowered water levels in the well caused by the applicant’s pumping. This includes the domestic wells in Fannells Meadow. A change in water quality has not been documented due to changes in water levels due to pumping in Maryland’s coastal plain unconfined aquifers and is not anticipated. The applicant will be responsible for all adverse impacts determined to be water level related. The applicant will not be required via permit condition to post a bond to cover the liability. The WSP is not aware of any approved residential lots in the area. Large residential subdivisions to be served by domestic wells on individual lots would be required to obtain a Water Appropriation and Use permit for the subdivision. New subdivisions would also be required to construct wells in accordance with modern well construction standards. All water users in Maryland have the right to make a beneficial use of the water associated with their property so long as the impacts to the resource and other users of the resource are reasonable.

24. *Question:* Who will monitor the water usage? Is Harborview Farms self-reporting?

Response: Agricultural Water Appropriation and Use permit holders with an allocation of greater than 10,000 gpd as an annual average are required to report monthly water use to the WSP on an annual basis. Non-agricultural permit holders report water use on a semi-annual basis. Water use reporting is a condition of the permit. Agricultural water users report before the end of January for the previous calendar year the quantity of water withdrawn in total gallons for each calendar month. Permittees know the capacity of the irrigation system, pump capacity, and number of hours pumped which enable them to track their water usage each month. The WSP prepares and mails the reporting forms and receives the reports back. These reports are tracked, and the data from the reports are compiled and compared with the permitted quantities. Issues of noncompliance are followed up, as appropriate. Water withdrawal reports are public information that can be requested under the procedures established by the Public Information Act.

25. *Question:* In other Eastern Shore communities, how many private wells have gone bad after irrigation wells have depleted the groundwater in drought years?

Response: The WSP has no documented evidence of domestic well failure as a result of lowered water levels due to agricultural withdrawals in the unconfined coastal plain aquifers of Maryland.

26. *Question:* In the MDE Notice of Application Received for State Permit it states: 'The wells will be drilled to a depth of approximately 130 feet. Impacts to the resource and other users were evaluated using aquifer data from geologic reports available to the administration.' a. Was this the 1998 Drummond Study?

Drummond, D.D. (1998) Hydrology, Simulation of Ground-Water Flow and Ground Water Quality of the Upper Coastal Plain Aquifers in Kent County, Maryland; Maryland Geological Survey Report of Investigations 68.

Response: The above referenced publication is one of the various publications and resources that the WSP uses to evaluate water withdrawal requests in Maryland. Site specific data is preferred to published data when available. Several reports were referenced in the appropriation permit file. Citations for some additional reports used can be found below:

Andreasen, David C., Staley, Andrew W., and Achmad, Grufron .J. Maryland Geological Survey. (2013). *Maryland Coastal Plain Aquifer Information System: Hydrogeologic framework* (Open-File Report 12-02-20).

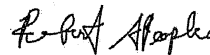
Cushing, E.M., Kantrowitz, I.H., and Taylor, K.R. United States Department of the Interior Geological Survey. (1973). *Water Resources of the Delmarva Peninsula* (Geological Survey Professional Paper 822).

Overbeck, R.M., Slaughter, T.H., and Hulme, A.E. (1958). *The Water Resources of Cecil, Kent and Queen Anne's Counties* (Bulletin 21).

Rasmussen, William C., and Andreasen, Gordon E. Maryland Geological Survey. (1959). *Hydrologic Budget of the Beaverdam Basin Maryland* (Geological Survey Water Supply Paper 1472).

11/20/2023

Date



Robert Peoples
Hearing Officer
Water Supply Program
Water and Science Administration

FACT SHEET

JUDICIAL REVIEW PROCESS

Legislation passed by the 2009 General Assembly changes procedures for certain permits issued by the Department, including water appropriation permits. The judicial review procedures took effect on January 1, 2010 and applies to final permit decisions issued on and after January 1, 2010.

Under pre-existing procedures, permit applicants and third parties with standing under Maryland law could challenge the issuance of a permit or the conditions of a permit through a request for a "contested case" adjudicatory hearing conducted by the Office of Administrative Hearings. Effective January 1, 2010, the "contested case" process no longer applies to final decisions on applications for these permits. Rather, permits can be challenged through a request for direct judicial review in the Circuit Court for the county where the activity authorized by the permit will occur. Applicants, and persons who meet standing requirements under federal law and who participated in a public comment process by submitting written or oral comments (where an opportunity for public comment was provided), may seek judicial review. Judicial review will be based on the administrative record for the permit compiled by the Department and limited to issues raised in the public comment process (unless no public comment process was provided, in which case the review will be limited to issues that are connected to the permit).

Who Has Standing?

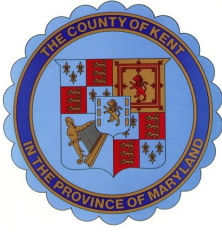
Anyone who meets the threshold standing requirements under federal law and is either the applicant or someone who participated in the public participation process through the submission of written or oral comments, as provided in Environment Article § 5-204, Annotated Code of Maryland. The three traditional criteria for establishing standing under federal law are injury, causation, and redressability, although how each criterion is applied is highly fact-specific and varies from case to case. Further, an association has standing under federal law to bring suit on behalf of its members when its members would otherwise have standing to sue in their own right, the interests at stake are related to the organization's purpose, and neither the claim asserted nor the relief requested requires the participation of individual members in the lawsuit.

What is the Procedure for Seeking Judicial Review?

Petitions for judicial review of a final determination or permit decision subject to judicial review must be filed in accordance with § 1-605 of the Environment Article no later than 30 days following publication by the Department of a notice of final determination or final permit decision and must be filed in the circuit court of the county where the permit application states that the proposed activity will occur. Petitions for judicial review must conform to the applicable Maryland Rules of Civil Procedure (Title 7, Chapter 200).

To review the legislation follow the link below:

http://mgaleg.maryland.gov/2009rs/chapters/noln/Ch_650_sb1065T.pdf



**American Rescue Plan Act (ARPA) Funds Spend Plan
12/19/2023
County Commissioners Meeting**

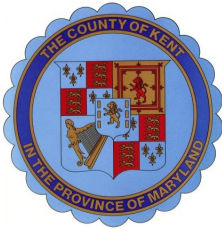
ATTACHMENTS:

Description

12-12-2023 ARPA Fund Commissioner Report

**AMERICAN RESCUE PLAN ACT FUND
AS OF COMMISSIONER MEETING MINUTES DATED
12/12/2023**

Project	Department	Project Estimate	Date Approved	Amount Approved	Date Completed
Feed the Elderly Year 1	Local Management Board	112,800	08/31/21	112,800	9/30/2022
Feed the Elderly Year 2 and 3	Local Management Board	204,115	03/08/22	204,115	
Clariflocculator Replacement Project	Water & Wastewater Fund	275,000	08/31/21	275,000	6/28/2022
Clariflocculator Replacement Project Change Order #1		2,817	01/11/22	2,817	6/28/2022
Clariflocculator Replacement Project Change Order #2		90,642	01/11/22	90,642	11/23/2022
AV System	Information Technology	71,254	10/26/21	71,254	5/17/2023
IT Software	Information Technology	27,095	10/26/21	27,095	8/10/2022
Neighborhood & Infrastructure Grants	Information Technology	258,402	12/14/21	258,402	
A/V Equipment in EOC	Emergency Operation Center	14,087	02/01/22	14,087	
SCADA Pump Station Monitoring	Water & Wastewater Fund	110,065	02/08/22	110,065	
Millington/RT301 Wastewater Treatment Feasibility Study	Water & Wastewater Fund	57,500	02/08/22	57,500	
Millington/RT301 Wastewater Conveyance System Capacity Study		9,500	09/27/22	9,500	
Tolchester Wastewater-Design Services Influent Screen	Water & Wastewater Fund	52,910	02/08/22	52,910	
Tolchester Wastewater - Bid Services and Const. Management		35,735	09/27/22	35,735	
Tolchester Wastewater Influent Screen Construction		600,914	04/25/23	600,914	
Worton WWTP Influent Lagoon Engineer Design & Bid Services	Water & Wastewater Fund	33,076	03/22/22	33,076	
Worton WWTP Influent Lagoon Engineer Const. Management		43,736	03/08/23	43,736	
Worton WWTP Lagoon Sludge Removal Contract		1,400,725	12/13/22	1,400,725	
Worton WWTP Lagoon Sludge Removal Contract Change Order #1		30,000	06/13/23	30,000	
Worton WWTP Lagoon Sludge Removal Contract Change Order #2		(486,784)	08/08/23	(486,784)	
Kennedyville Pump Station #2 Relocation Design	Water & Wastewater Fund	52,338	09/27/22	52,338	
Kennedyville Pump Station #2 Relocation Const. Management		<i>Deferred</i>			
Kennedyville Pump Station #2 Construction		<i>Deferred</i>			
Worton/Kennedyville GIS Water and Sewer Facilities Mapping	Water & Wastewater Fund	75,770	09/27/22	75,770	
Worton Vehicle Storage Building & site prep/lighting/heat	Water & Wastewater Fund	40,000	10/25/22	40,000	
Worton WWTP Solids Press Replacement Design	Water & Wastewater Fund	64,940	11/28/23	64,940	
Worton WWTP Solids Press Replacement Construction Management		20,000.00			
Worton WWTP Solids Press Replacement		250,000.00			
Total Amount of Funds Committed		<u>\$ 3,446,637</u>		<u>\$ 3,176,637</u>	
Amount of ARPA Funds		3,766,777		3,766,777	
Balance of ARPA Funds Remaining		<u>\$ 320,140</u>		<u>\$ 590,140</u>	



Contingency and Use of Fund Balance Report 12/19/2023 County Commissioners Meeting

ATTACHMENTS:

Description

12-12-2023 Commissioner Report Contingency

**FY24 CONTINGENCY & USE OF FUND BALANCE
AS OF COMMISSIONERS MEETING MINUTES DATED
December 12, 2023**

[illegible]