Economic Development Commission - Oct 21 2026 Agenda

Wednesday, October 21, 2026 at 6:00 PM

Chesapeake Building Commissioners Conference Room, 41770 Baldridge Street, Leonardtown, MD

Page

1. CALL TO ORDER

A. Call to Order (5 min.)

2. ROLL CALL

A. Roll Call (5 min.)

B. New Member Introduction (5 min.)

3. PRESENTATIONS

A. Visit St. Mary's MD (10 min.) 3
Liz Mildenstein, Executive Director

Briefing notes

EDC_2026_VSMMD - 102126.pptx

B. Regional Workforce Study Report (10 min.) 18
Cindy Greb, DED Director

Briefing notes

SoMD_Regional Workforce Study_Final (2) - 100626.pdf

SoMD_RESI_Presentation - 100626.pptx

4. OLD BUSINESS

A. Approval of Minutes (5 min.) 102

Briefing notes

Economic Development Commission - Jul 15 2026 - Minutes - Members (1).pdf

I move to approve the minutes of the July 15, 2026 Economic Development Commission.

B. Housing Solutions White Paper Discussion (10 min.) 106

Briefing notes

M Burgan - THE ST. MARY'S 2030 PROSPERITY STRATEGY - White Paper - 071326.pdf

5. NEW BUSINESS

A. EDC Meeting Schedule for 2027 (5 min.)
Wednesday, January 20, 2027
Wednesday, April 21, 2027
Wednesday, July 21, 2027
Wednesday, October 20, 2027

B. DED Program Updates (10 min.)

C. Sector Updates (15 min.)

6. PUBLIC COMMENTS

7. ADJOURN

Appropriate accommodations for individuals with special needs will be provided upon request. In order to meet these requirements, we respectfully ask for one week□□□s prior notice. Please contact Lisa Ledman at 240-309-4021. Proceedings are televised live and/or recorded for later broadcast on television. All content of these proceedings is subject to disclosure under the Maryland Public Information Act. Photographic and electronic audio and visual broadcasting and recording devices are used during this meeting. These are public meetings and attendance at these meetings automatically grants St. Mary's County Government permission to broadcast your audio and visual image

Annual Update to the EDC

October 22, 2026



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Visit ST MARY'S MD

*Visit St. Mary's MD is the official destination marketing organization (DMO) for **Maryland's Original Destination: St. Mary's County**. We focus on attraction development, marketing, and helping our tourism partners deliver unique visitor experiences.*

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Dr. Scott Gray, Member
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Town Administrator, Town of the Leonardtown



Erin MElanson
Owner, Xella Winery



Cindy Greb, Member
Director, St. Mary's County Department of Economic Development



Claudinne Miller, Member
Owner, Dixon Family Farm



J. Scott Ridgell, Member
Owner, Buzzy's Country Store

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FY27 Focus Areas & Strategic Goals

- Oysters are for everyone – Marketing efforts to combat the decline in wild caught oyster demand
- St. Mary's Co-op Marketing Program
- Southern Maryland Tourism Marketing Series
- Update the Tourism & Hospitality Master Plan
- Tourism Ambassador Program
- Visitor Center Upgrades at Patuxent River Naval Air Museum
- 'Tourism Tides' Industry Newsletter and Members Page on Website
- Participate in the planning and execution of MD250, local 400th planning efforts and Fort to 400 Commission
- Participate in the planning and execution of the Passenger Ferry Implementation Plan
- Sustain and grow strategic partnerships



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Oysters are for Everyone Marketing Campaign











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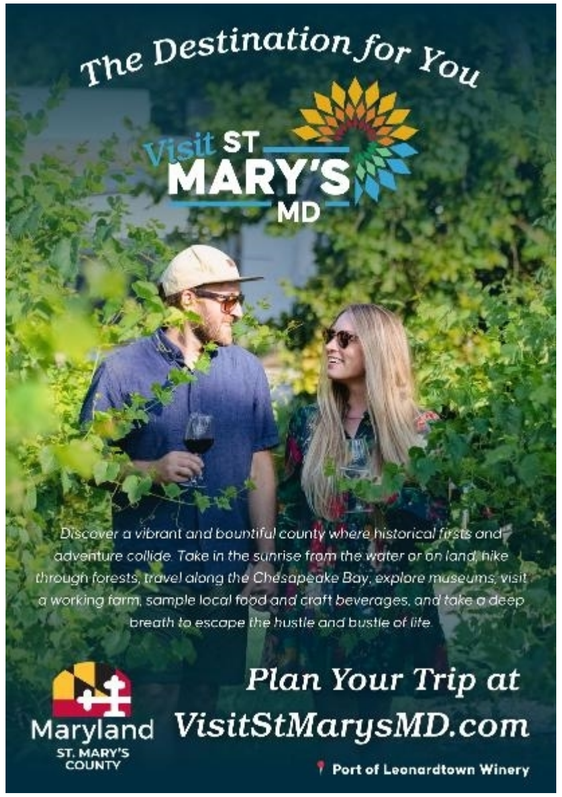


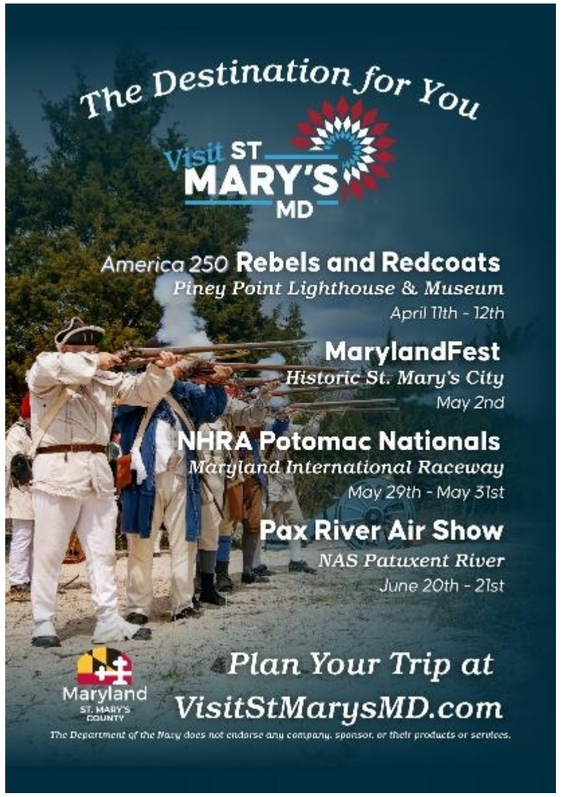
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Oyster campaign compliments “The Destination for You”

- **Focus on budget travel including free events and easy coastal getaway within hours of your home**
- **A lodging option for every budget**
- **America/MD 250**
- **Highlight the signature events that feature regional culture**
- **Target markets: Baltimore, Philadelphia, DC, Norfolk**











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St. Mary's County Tourism Ambassador Proaram









Professional development program designed for the tourism and hospitality workforce

Now accepting applications through

November 6, 2026

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Visit St. Mary's MD is the county's destination marketing organization. This partner portal is a dedicated way to share industry news, grant and funding opportunities, and marketing initiatives that support the destination and you, our partners. Stay informed, aligned, and connected with us as we continue working together to promote and strengthen our region.

SUBSCRIBE TO OUR BI-MONTHLY E-NEWSLETTER, 'TOURISM TIDES'

Previous issues are available:

August/September 2026 · June/July 2026 · April/May 2026



TING & SPONSORSHIP PROGRAM

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ST. MARY'S

Press Releases



ST. MARY'S

SmugMug Photo Gallery

- **Industry Newsletter**
- **Professional development opportunities**
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- **Marketing Photo Gallery**
- **Latest News**

https://www.visitstmarysmd.com/members/

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FY27 Focus Areas & Strategic Goals

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Economic Impact & Visitor Insights

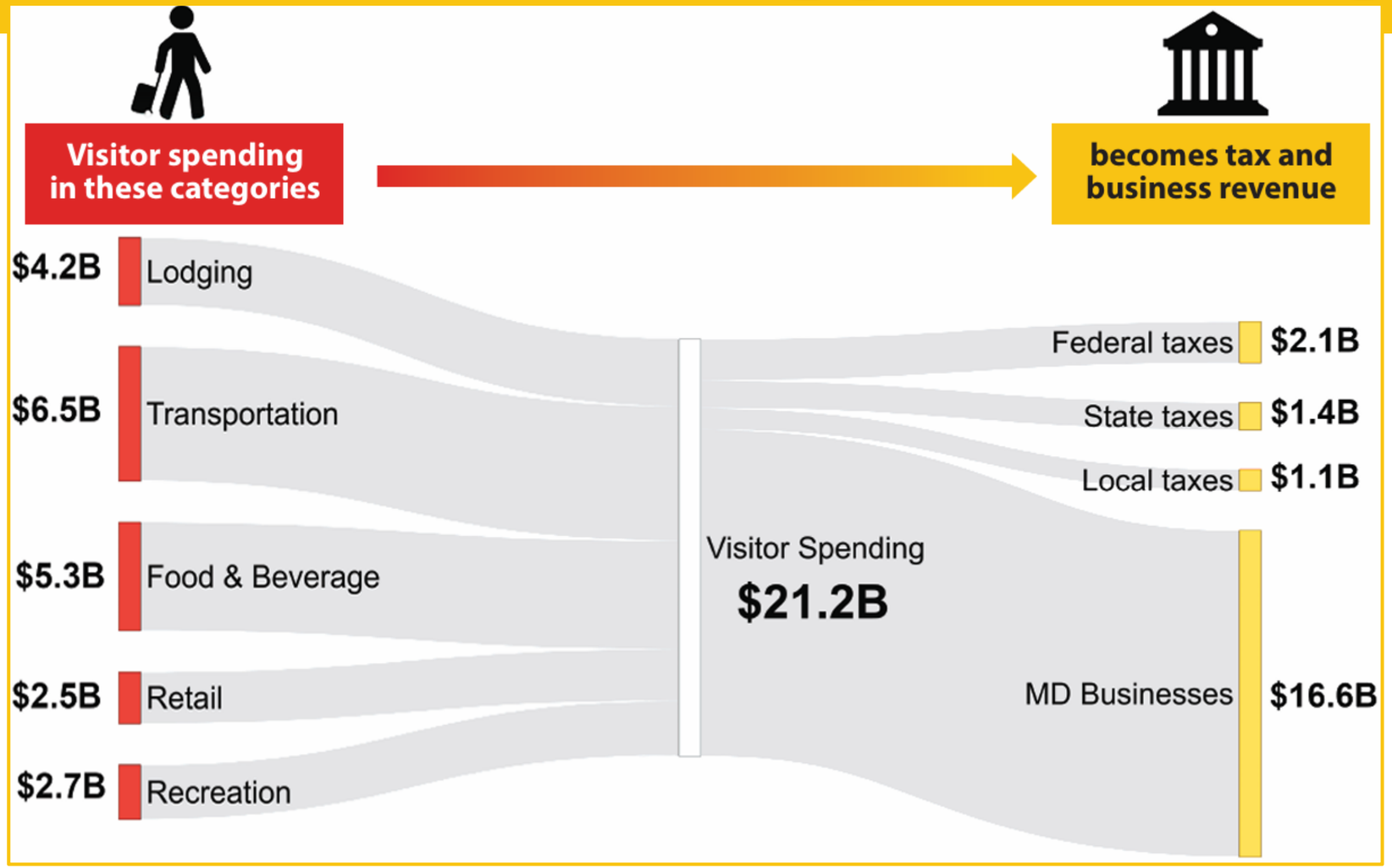




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TOURISM
is a Growth Strategy for Maryland



Source: D. K. Shifflet, Tourism Economics / Report: Economic Impact of Tourism in Maryland (2024); Gray Research

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922,500 visitors
(521K Day / 401K Overnight)



$244 million in visitor spending

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Lodging, 26%



Food/Bev, 30%



Transport, 18%



Retail, 13%



Recreation, 12%

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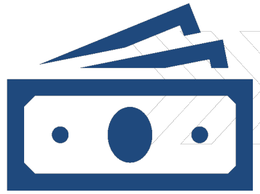
Nearly 2,170 visitor-supported jobs, representing 4.6% of all jobs in St. Mary's County

Source: D. K. Shifflet, Tourism Economics / Report: Economic Impact of Tourism in Maryland 2025

How does that translate to economic impact?



State, local and hotel tax revenue generated through tourism could pay the salaries of **615 public school teachers**



Visitors are spending an average **$676,671 each day** in the county



The $96.1M in total income generated by the visitor economy is the equivalent of **$823 for every household** in the county

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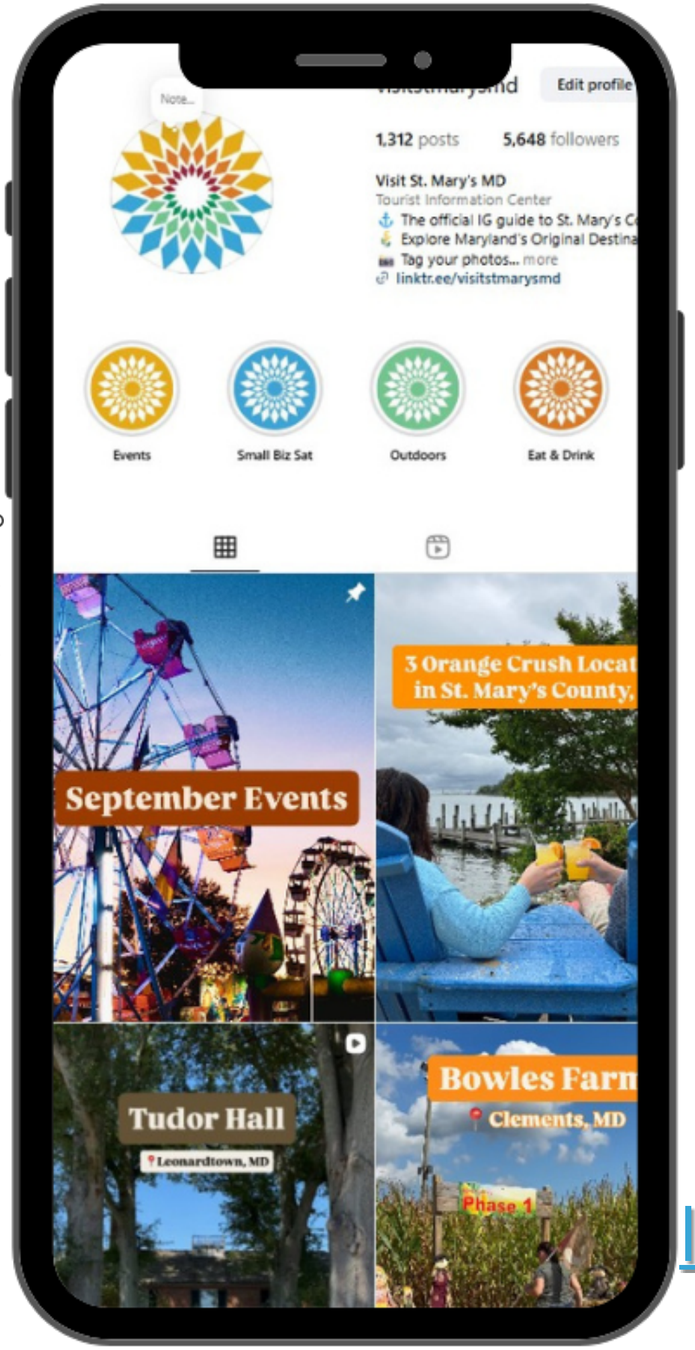
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liz@visitstmarysmd.com

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Website: www.visitstmarysmd.com



Questions?

Contact: Liz Mildenstein, Executive Director
liz@visitstmarysmd.com / info@visitstmarysmd.com

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Southern Maryland Workforce Study

Prepared for
St. Mary's County Department of Economic Development

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September 21, 2026



Towson, Maryland 21252 | 410-704-3326 | www.towson.edu/resi

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1.0 Executive Summary

The Regional Economic Studies Institute (RESI or Project Team) of Towson University was tasked by St. Mary's County Department of Economic Development (the Client) to conduct a comprehensive workforce study of St. Mary's County and the Southern Maryland (SoMD) Region. The analysis aimed to identify workforce requirements and gaps, recruitment and retention difficulties, and ways to address these challenges. To undertake the study, RESI used a multi-pronged approach that included background research, industry data analysis, and focus group sessions with local industry and regional stakeholders.

First, RESI explored demographic and socioeconomic factors to provide insight into the tri-county workforce and population. Several case studies were then conducted for areas that had been reliant on federal funding and have diversified their local economy after shifts in spending and Base Realignment and Closure (BRAC) realignments. The industry analysis progressed with a review of current labor data for SoMD to identify critical labor categories, both current and long term (5-10 years), in research, technology, engineering, and other related fields. Regional assets and industry patterns were studied to explore potential sectors for diversified growth, accounting for priorities in local regional development plans. Several focus group sessions were also held with industry stakeholders to gain additional perspectives and insights into workforce challenges and assets in the region.

Major findings from each component of the analysis are highlighted below.

1.1 Background

The SoMD Region, which is comprised of St. Mary's County, Calvert County, and Charles County, blends a backdrop of rural landscapes and scenic waterways with major defense installations and cutting-edge industry research. The region's economy is anchored by defense, engineering, and government support industries, largely driven by two significant Naval installations: Naval Air Station Patuxent River (NAS Patuxent River) and Naval Support Facility Indian Head (NSF Indian Head). While comparatively smaller, the Naval Research Laboratory Chesapeake Bay Detachment (NRL-CBD) in Calvert County also conducts research in numerous areas such as radar, optical devices, electronic warfare, communications, materials, and fire research. Activity on and around these installations has been a regional asset, providing stability and acting as a central anchor for economic activity. However, overreliance on federal funding and operations can introduce vulnerability during times of uncertainty. In 2025, there were shifts in federal funding and early retirement opportunities were offered through the Voluntary Early Retirement Authority (VERA). Although these early retirements were accepted by many of those eligible, the departing employees carried with them substantial knowledge and expertise that are difficult to replace.[1]

[1] Jessica Jennings, "Naval Support Facility Indian Head Faces 12–15% Workforce Loss, Contractors Expected to Step In," *The Baynet*, September 12, 2025, accessed March 16, 2026, https://thebaynet.com/naval-support-facility-indian-head-faces-12-15-workforce-loss-contractors-expected-to-step-in/.

While the SoMD landscape offers a unique work-life opportunity for some, it also presents challenges with growing industries and attracting residents to the area. During focus group sessions, participants were asked about any factors that made it difficult to bring new employees and residents to St. Mary's County or the SoMD Region as a whole. Throughout these discussions participants acknowledged housing as a challenge, particularly for younger workers who had limited options amid a high-cost housing market. Notably, however, housing concerns were largely overshadowed by other recruitment issues related to local entertainment, amenities, and cultural offerings. These discussions expressed a need for strategic development of dining and retail establishments in particular, while ensuring that development is guided in a way that preserves the area's rural landscape and character.

1.2 Industry Analysis

SoMD's labor market is characterized by a bifurcated economy, with very specialized, high-wage industries in defense, engineering, government, and energy existing alongside service-based industries such as healthcare, education, food service, farming, and aquaculture that generally offer average or below-average wages. At the county level, St. Mary's County is anchored by defense and engineering, Calvert County by energy production and transmission, and Charles County by a mix of service-based employment and government activities.

The region employed 126,014 workers in 2025, with the top ten industries accounting for 42 percent of total employment. *National Security* (12,221 jobs) and *Engineering Services* (6,277 jobs) remain major economic drivers and offer wages well above the state average, while *Elementary and Secondary Schools* (10,359 jobs) and *Full-Service Restaurants* (5,313 jobs) represent large sources of employment but typically offer lower wages.

The industry concentration analysis highlighted regional strengths in *National Security, Engineering Services, Nuclear Electric Power Generation*, and *Other General Government Support*. Niche industries such as *Shellfish Farming* and *Farm Product Warehousing and Storage* also demonstrated strong specialization, despite relatively small employment bases.

1.2.1 Qualification Gaps and Industry Projections

The analysis identified several workforce shortages across the region. The largest qualification gaps were *Secret Clearance* (131-worker gap); *Mathematics* (109-worker gap); *Working with Children – Education/Childcare* (101-worker gap); *Teaching/Training, Job* (83-worker gap); and *Sales* (74-worker gap). The shortage of workers with *Secret Clearance* reflects SoMD's high concentration of defense-related employment and is reportedly influenced by lengthy clearance processes and an applicant pool that has declined in recent years. While *Secret Clearance* represented the largest qualification shortage by volume, *System Integration* showed the most constrained labor market, with only 22 candidates available for 64 openings. Many of these skill gaps aligned with occupations projected to face some of SoMD's most significant workforce shortages through 2035.

Looking ahead, workforce demand in SoMD will be driven primarily by replacement needs rather than economic expansion. Among the region's largest industries, *Engineering Services* is

projected to generate the largest net employment growth between 2025 and 2035 (265 jobs); followed by *Offices of Physicians* (132 jobs); and *Limited-Service Restaurants* (126 jobs). However, *National Security* is projected to lose 564 jobs and *Elementary and Secondary Schools* are estimated to lose 150 jobs, contributing to a net decline of 77 jobs across the region's ten largest industries.

Despite limited growth, employer demand will remain due to workforce exits and transfers. Projected total demand for *Elementary and Secondary Schools* is expected to reach 9,563 positions through 2035, followed by *Full-Service Restaurants* (9,284 jobs) and *National Security* (8,882 jobs). Consistent with these projections, focus group participants expressed concern about a potential workforce "cliff" as retirements accelerate and employers face increasing challenges filling leadership, technical, and other critical positions. These trends mirror broader statewide projections and underscore the importance of workforce development, talent attraction, retention, and upskilling efforts to sustain the SoMD Region's economic competitiveness.

1.3 Areas of Focus

Based on the analysis of historical and projected workforce trends, several strategies emerged to support the economic development of the SoMD region. Workforce development efforts should focus on strengthening and retaining the existing skilled workforce considering anticipated retirements and other workforce exits. Focus group feedback also highlighted the need for additional housing options, including affordable housing for interns and early career workers to improve talent attraction and retention. Across all focus groups, participants also consistently identified a lack of cultural amenities as a challenge to recruiting and keeping workers in the region.

The region possesses several assets that support future economic development in research and innovation, such as expansion of the defense and aviation industries in the AeroPark District. Further, SoMD can also capitalize on emerging opportunities in energetics and advanced manufacturing to expand specialized industries, attract investment, and create new career pathways. Supporting this growth will require continued alignment of education and training with industry needs, as well as ongoing engagement with employers to identify evolving workforce challenges and opportunities.

Finally, the region should pursue strategies that diversify and expand local industries, particularly those that provide employment opportunities for workers with varying levels of education and training. Building on initiatives such as the St. Mary's Seafood brand, there may be an opportunity to strengthen seafood processing, distribution, and other related activities. Additional growth potential may be found in aquaculture, agriculture, tourism, and related sectors, which can broaden the region's economic base, create more accessible employment opportunities, and enhance long term economic resilience.

2.0 Introduction

The Regional Economic Studies Institute (RESI) of Towson University was tasked by St. Mary's County Department of Economic Development (the Client) to conduct a comprehensive workforce study of St. Mary's County and the Southern Maryland (SoMD) Region. To undertake the study, RESI reviewed SoMD labor force data to identify critical labor categories in research, technology, engineering and other related fields. The analysis aims to identify requirements and gaps, recruitment and retention challenges, and ways to address these challenges. These data will assist in recruitment and workforce alignment for the SoMD region, including Naval Support Facility Indian Head (NSF Indian Head), Naval Air Warfare Center Aircraft Division (NAWCAD), and Naval Surface Warfare Center Indian Head Division (NSWC IHD). RESI explored regional assets and industry patterns to explore potential sectors for diversified growth, as well as demographic and socioeconomic factors to provide greater insight into the tri-county workforce and population.

This document will continue as follows.

- Section 3 provides background information on the SoMD Region, including demographics, a broad industry overview, and regional assets and challenges;
- Section 4 highlights findings from several case studies on economic diversification;
- Section 5 contains the results of the regional industry data analysis; and
- Section 6 concludes the report.

Additionally, there are two appendices that provide detailed data tables and additional information on the focus group methodology and structure.

3.0 Background

The SoMD Region, which is comprised of St. Mary's County, Calvert County, and Charles County, blends a backdrop of rural landscapes and scenic waterways with major defense installations and cutting-edge industry research. While this contrast offers a unique work-life opportunity for some, it also presents challenges with growing industries and attracting residents to the area. To provide context surrounding the analysis, the Project Team conducted a literature review and background research on several topics. The first subsection of this review highlights demographics for the SoMD Region, including age, race, and educational attainment. Industry background for the region is then discussed, including a focus on economic goals and challenges from St. Mary's County's recent strategic plans. Throughout these subsections, comments and findings from the focus groups are incorporated to provide additional context and insight. Finally, several case studies highlight examples of defense industry diversification and commercial expansion efforts.

3.1 Socioeconomic and Demographic Highlights

The three counties that comprise SoMD vary in their demographics, household characteristics, educational levels, and employment patterns. The following subsection will highlight

differences between SoMD counties and the state overall. For additional demographic data tables, please refer to Appendix A.

Demographic characteristics including population growth rates and median age are presented in Figure 1 below.

Figure 1: Age and Gender, 2020-2024 Average

Demographic Factor	St. Mary's County	Calvert County	Charles County	Maryland
Population[2]	115,126	94,313	170,527	6,206,011
Working-age Population (18-64 Years)	71,433	57,115	106,455	3,795,770
Average Annual Population Growth	0.5%	0.4%	1.3%	0.5%
Male	50.4%	49.9%	48.2%	48.7%
Female	49.6%	50.1%	51.8%	51.3%
Median Age (Years)	37.2	40.8	38.9	39.4

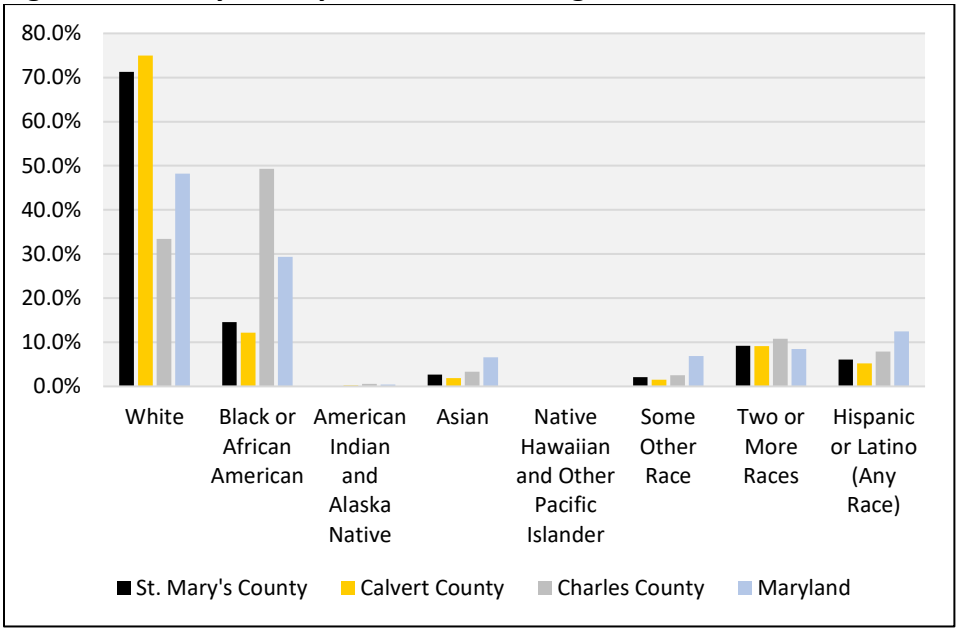
Sources: Jobs EQ, U.S. Census Bureau

As illustrated above, Calvert County had both the lowest population count and average annual growth rate of the three SoMD counties. Charles County had the highest population count in SoMD and an average annual population growth rate of 1.3 percent, over double the state's average rate. The highest working-age population, or those 18-to-64 years old, was also in Charles County at 106,455 residents. Calvert County had the lowest population growth rate at 0.4 percent, just under the state average of 0.5 percent. The median age varied slightly, with St. Mary's County having the lowest (37.2 years) and Calvert County having a higher-than-state median of 40.8 years.

[2] Note that total population data only are from 2025, while other factors are from the ACS five-year averages for 2020-2024.

Figure **2** below shows the racial and ethnic variation between the SoMD Region's counties and the state overall.

Figure 2: Race by County, 2020-2024 Average



Sources: Jobs EQ, U.S. Census Bureau

Racial demographics varied across the counties, with some stark differences. St. Mary's and Calvert counties had a majority White population (71.3 and 75.0 percent, respectively), while Charles County had a significantly higher proportion of Black or African American residents (49.3 percent). Similarly, St. Mary's and Calvert counties had lower proportions of Hispanic or Latino residents compared to both Charles County and the state overall.

Figure 3 below shows educational attainment for SoMD and the state, showing that on average, counties in the SoMD Region had a lower level of education compared to Maryland overall.

Figure 3: Highest Level of Educational Attainment at 25+ Years, 2020-2024 Average

Educational Attainment	St. Mary's County	Calvert County	Charles County	Maryland
No High School Diploma	6.0%	4.1%	4.6%	8.3%
High School Graduate	25.5%	25.5%	27.2%	22.3%
Some College, No Degree	20.4%	22.1%	23.7%	17.2%
Associate Degree	9.2%	9.2%	9.1%	7.1%
Bachelor's Degree	22.2%	22.5%	19.6%	24.0%
Postgraduate Degree	16.8%	16.7%	15.7%	21.0%

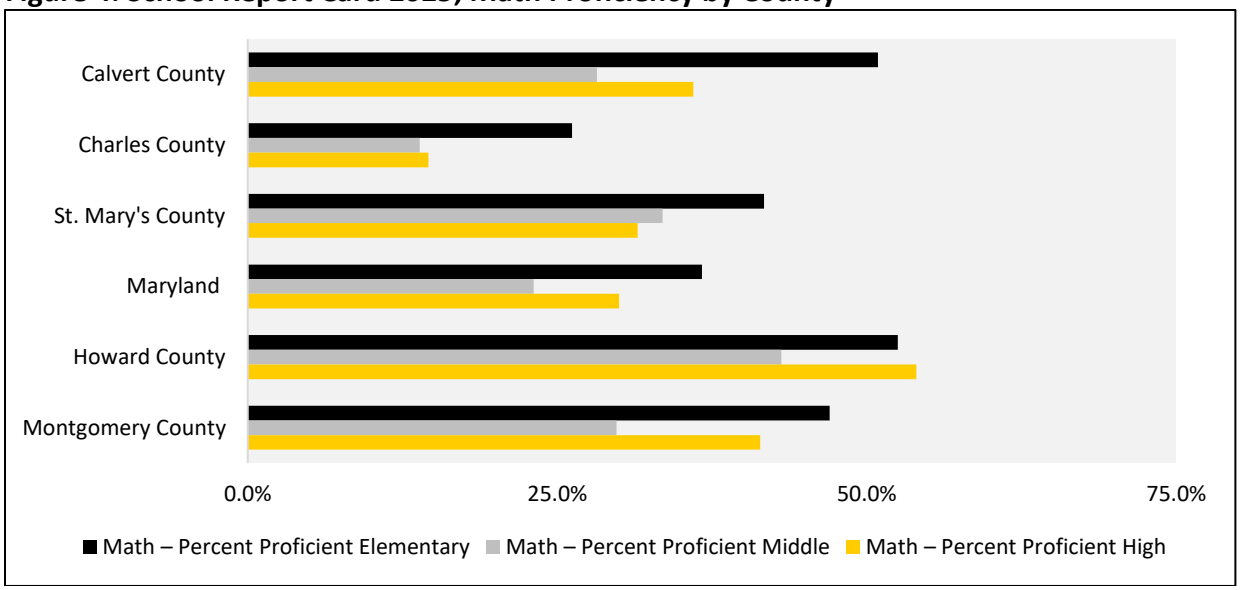
Sources: Jobs EQ, U.S. Census Bureau

Each county within the SoMD Region had a greater proportion of residents with a high school education only (ranging from 25.5 to 27.2 percent) compared to the state average of 22.3 percent. The proportion of residents with a bachelor's or postgraduate degree was also lower in SoMD compared to the state overall. This is an interesting finding, as these averages are likely

obscuring high concentrations of highly educated individuals with advanced degrees in areas within these counties. For example, the California-Lexington Park area within SoMD has the highest concentration of aerospace engineers in the country, while Charles County has the greatest concentration of energetics engineers and scientists in the U.S. Navy.[3,4] It is also notable that there is a higher-than-average proportion of residents in SoMD with some college but no degree, which may signal a mismatch of educational goals or difficulty with upskilling local populations.

During the focus group sessions, it was mentioned that some potential employees were hesitant to live in SoMD due to public school quality. This concern was not uniform across all of the region, with participants noting this was not a significant issue for Calvert County. Figure 4 below shows 2025 proficiency levels in math for each SoMD county, produced by the Maryland State Department of Education (MSDE).[5]

Figure 4: School Report Card 2025, Math Proficiency by County



Sources: Maryland State Department of Education, RESI

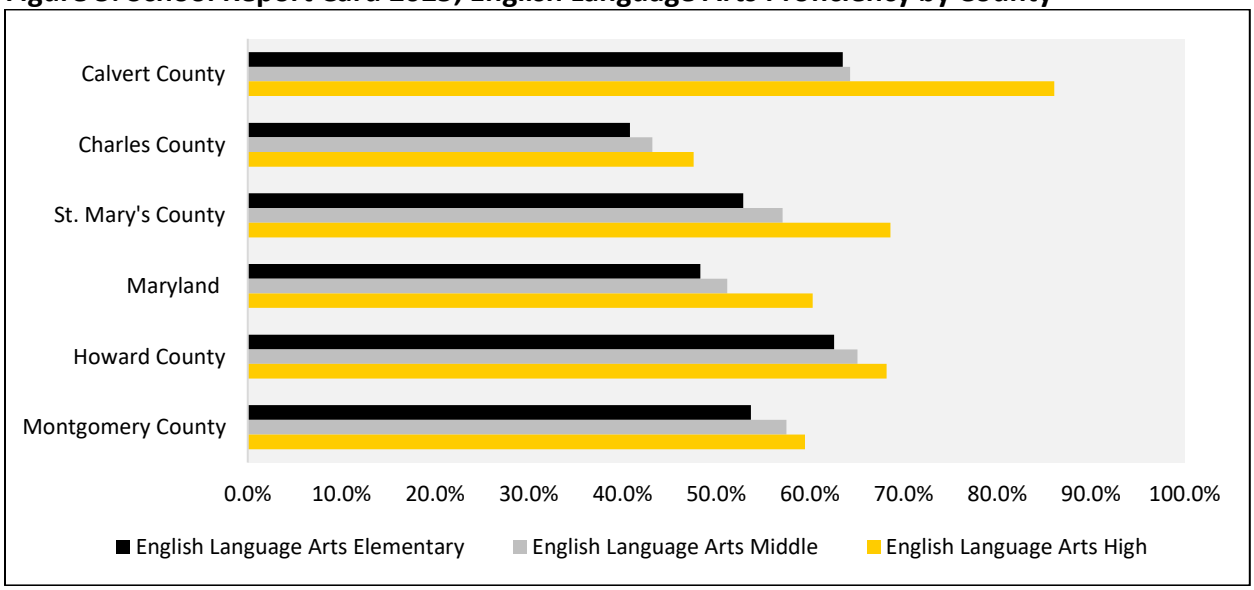
As shown above, Calvert and St. Mary's counties showed proficiency levels that exceeded the state average across all cohorts for math, while Charles County scored below state averages. When comparing SoMD to two top-performing counties in the state (Howard and Montgomery), math proficiency scores were lower for high school cohorts in particular.

[3] Maryland Department of Commerce, "Aerospace & Defense," 2, accessed June 15, 2026, https://commerce.maryland.gov/documents/researchdocument/marylandaerospaceanddefenseindustryfactsheet.pdf.
[4] Maryland Department of Commerce, "Brief Economic Facts - Charles County, Maryland," 1, accessed June 15, 2026, https://commerce.maryland.gov/documents/researchdocument/charlesbef.pdf.
[5] "2025 Maryland School Report Card," Maryland State Department of Education, accessed June 1, 2026, https://reportcard.msde.maryland.gov/.

Notably, Calvert County had the second-highest score for elementary math proficiency, while Howard County led scores for each age group.

Figure 5 below shows English Language Arts Proficiency for SoMD counties and the same comparison groups.

Figure 5: School Report Card 2025, English Language Arts Proficiency by County



Sources: Maryland State Department of Education, RESI

For English Language Arts, Calvert and St. Mary's counties showed proficiency levels that exceeded the state average across all cohorts, while Charles County scored below state averages. When comparing SoMD to top-performing counties in the state, both Calvert and St. Mary's counties were competitive with English scores. Notably, Calvert County outperformed both the state and high-ranking counties in English Language Arts for elementary and high school. With school quality being a strong motivator for some potential residents, particularly those with school-age children, higher public-school scores are likely to increase the attractiveness of the region.

Figure **6** below highlights several employment and income-related characteristics across SoMD and the state.

Figure 6: Select Employment and Income Characteristics, 2020-2024 Average

Factor	St. Mary's County	Calvert County	Charles County	Maryland
Labor Force Participation Rate (LFPR)	67.5%	66.1%	69.2%	66.9%
Work from Home	17.5%	18.5%	16.4%	19.3%
Armed Forces Labor Force	3.2%	1.5%	1.5%	0.8%
Veterans, Age 18-64	12.9%	9.4%	11.6%	4.9%
Median Household Income	$119,446	$133,922	$122,816	$103,678
Per Capita Income	$53,417	$57,710	$51,110	$52,979
Poverty Level (of all people)	8.0%	3.9%	6.9%	9.4%
Households Receiving Food Stamps/SNAP	11.2%	5.1%	9.7%	11.2%

Sources: Jobs EQ, U.S. Census Bureau

The SoMD counties were generally consistent with the state average on labor force participation rate (LFPR) and proportion of work-from-home residents. Charles County had a slightly higher LFPR and slightly lower proportion of individuals working from home compared to the state and other SoMD counties. All three SoMD counties had a higher-than-average proportion of armed forces in the labor force (ranging from 1.5 to 3.2 percent) compared to the state (0.8 percent). Similarly, each SoMD county had a greater proportion of veterans (ranging from 9.4 to 12.9 percent) than the state average of 4.9 percent. Household income across SoMD exceeded the state median, ranging from $119,446 in St. Mary's County to $133,922 in Calvert County. When evaluating income on a per capita basis, which includes those not in the labor force, only Calvert County stands out with $57,710 compared to $52,979 for the state.

Focus group participants noted that there can be benefits to working in roles that command high earnings while having a relatively lower cost of living by residing in SoMD. For this reason, several individuals noted that significant commuting times are common. Some participants also expressed concerns about the potential for traffic congestion to increase along busy commuter corridors if population levels grow without adequate infrastructure improvements.

Figure 7 below shows commuting characteristics across the SoMD Region and the state overall.

Figure 7: Commuting Characteristics, 2020-2024 Average

Factor	St. Mary's County	Calvert County	Charles County	Maryland
Worked in State of Residence	94.1%	86.8%	73.5%	87.4%
Worked in County of Residence	80.0%	52.2%	48.6%	62.4%
Worked Outside County of Residence	14.1%	34.6%	25.0%	24.9%
Worked Outside State of Residence	5.9%	13.2%	26.5%	12.6%
Commute Less than 30 Minutes	60.9%	39.5%	34.5%	51.3%
Commute 30-60 Minutes	25.8%	35.4%	36.3%	36.0%
Commute Over 60 Minutes	13.2%	25.0%	29.1%	12.7%
Mean Travel Time to Work (Minutes)	30.4	40.7	43.1	31.5

Sources: Jobs EQ, U.S. Census Bureau

The vast majority of residents in St. Mary's and Calvert counties worked in Maryland, while this was accurate for a lower proportion (73.5 percent) of Charles County residents. The data for Charles County show that 26.5 percent of residents worked outside of the state—more than double the rate for Maryland overall. Approximately 80.0 percent of St. Mary's residents also worked in the same county, while only 52.2 percent of Calvert and 48.6 percent of Charles County residents worked in their respective counties.

Calvert and Charles counties also had higher average travel times to work than residents in St. Mary's County or the state overall. When considering travel times, workers living in St. Mary's County had the shortest average of 30.4 minutes. This is in line with the state average (31.5 minutes) but lower than Calvert (40.7 minutes) and Charles counties (43.1 minutes). The percentage of workers commuting more than 60 minutes was significantly higher for Calvert (25.0 percent) and Charles counties (29.1 percent) compared to St. Mary's County (13.2 percent).

The demographics throughout this subsection illustrate the varied characteristics of residents in the SoMD Region. Notably, housing data will be discussed in Section 3.3 alongside challenges of attracting individuals to the region.

3.2 Industry in the SoMD Region

SoMD's economy is supported by complementary strengths across its three counties, including defense and aerospace in St. Mary's County; energy in Calvert County; and defense, energetics, and government activity in Charles County. Significant Naval installations are also found in the region: Naval Air Station Patuxent River (NAS Patuxent River) and Naval Support Facility Indian Head (NSF Indian Head). Located in St. Mary's County, NAS Patuxent River is home of the Naval Air Systems Command (NAVAIR) headquarters and the Naval Air Warfare Center Aircraft Division (NAWCAD). NAS Patuxent River has over 50 tenants that include federal agencies and private industry with approximately 9,800 civilian workers, 5,700 contractors, and 2,400 active-

duty military personnel.[6] In northwest Charles County, NSF Indian Head has a workforce of approximately 2,700 employees, including 900 scientists and engineers, working to advance energetics and energetics systems for the U.S. military.[7] NSF Indian Head also includes the Naval Surface Warfare Center Indian Head Division (NSWC IHD), which is the country's only design and development agent for underwater warheads and explosives.[8] While comparatively smaller, in Calvert County, the Naval Research Laboratory Chesapeake Bay Detachment (NRL-CBD) conducts research in numerous areas such as radar, optical devices, electronic warfare, communications, materials, and fire research.[9]

Activity on and around these installations has been a regional asset, providing stability and acting as a central anchor for economic activity. An economic impact analysis of major military installations in the state conducted by the Maryland Department of Commerce in 2023 highlighted the significant effects from these bases.[10] However, overreliance on federal funding and operations can introduce vulnerability during times of uncertainty. In 2025, there were shifts in federal funding and early retirement opportunities were offered through the Voluntary Early Retirement Authority (VERA). Although these early retirements were accepted by many of those eligible, the departing employees carried with them substantial knowledge and expertise that are difficult to replace.[11] At NSF Indian Head, this shift resulted in a 12 to 15 percent workforce reduction, while NAVAIR has experienced a 9.3 to 9.5 percent workforce reduction through Deferred Resignation Programs and voluntary retirements.[12,13]

The SoMD Region is not isolated to federal entities, however, with significant private and commercial interests. The following brief summaries highlight additional county attributes and efforts to bolster economic activity in the region.

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[6] "Patuxent River, MD," Naval Air Systems Command, accessed March 17, 2026, https://www.navair.navy.mil/PaxRiver.
[7] "NSWC Indian Head Is Mission Critical to Charles County and the Nation," Charles County Economic Development Department, accessed March 17, 2026, https://www.meetcharlescounty.com/blog/2023/03/14/default/nswc-indian-head-is-mission-critical-to-charles-county-and-the-nation/#:~:text.
[8] "NSWC Indian Head – What We Do," NAVSEA, accessed March 17, 2026, https://www.navsea.navy.mil/Home/Warfare-Centers/NSWC-Indian-Head/What-We-Do/.
[9] "Chesapeake Bay Detachment (CBD)," U.S. Naval Research Laboratory, accessed August 18, 2026, https://www.nrl.navy.mil/Our-Work/Field-Sites/Chesapeake-Bay-Detachment-CBD/.
[10] Maryland Department of Commerce, "Economic Impact of Maryland's Miliary Installations and the Associated Defense Ecosystem," 1-2, accessed August 18, 2026, https://commerce.maryland.gov/Documents/ResearchDocument/economic-impact-analysis-of-marylands-military-installations-fy-2021.pdf.
[11] Jennings, "Naval Support Facility Indian Head Faces 12–15% Workforce Loss, Contractors Expected to Step In."
[12] Jennings, "Naval Support Facility Indian Head Faces 12–15% Workforce Loss, Contractors Expected to Step In."
[13] Jessica Jennings, "NAVAIR Experiences 9.3 Percent Cut of Civilian Workforce Through Voluntary Resignations," The Baynet, May 7, 2025, accessed March 16, 2026, https://thebaynet.com/navair-experiences-9-3-percent-cut-of-civilian-workforce-through-voluntary-resignations/.

St. Mary's County

In the 1990s, NAS Patuxent River in St. Mary's County was selected to host Naval Air Warfare Center Aircraft Division (NAWCAD) and Naval Air Systems Command (NAVAIR) as part of the BRAC process. This shift catalyzed new research and development, testing, and attracted technology businesses, eventually growing to form a cluster of specialized employees and industry.[14] While growth around these installations has often been a regional asset, reliance on federal funding sources can create economic vulnerability during times of uncertainty. To compensate for this, other regional resources can be leveraged to further support business development and growth, such as educational institutions and local partnerships, existing infrastructure, access to multiple waterways, and skilled workers with a strong knowledge base.

In St. Mary's County, the AeroPark Innovation District represents one opportunity to expand private and commercial growth. The Innovation District includes the St. Mary's County Regional Airport; University System of Maryland Southern Maryland (USMSM); USM SMART building; USM Unmanned Aerial Test Site; the TechPort business accelerator; and private aviation and aeronautics companies.[15] TechPort serves as an important interaction point between Naval labs, private industry, educational institutions and other military branches.[16] Further, the accelerator's proximal location supports tech transfer from military into private or commercial ventures, bolstered by the available airfield and aviation resources for testing.[17] Collectively, these assets create opportunities to accelerate technology transfer, commercialization, dual-use technologies, autonomous systems, and aviation/aerospace growth in the county.

Calvert County

Approximately 40 miles southeast of Washington, D.C., Calvert County is home to the Naval Research Laboratory – Chesapeake Bay Detachment (NRL-CBD).[18] At this unique land, sea, and air facility complex that encompasses nearly 158 acres, NRL research is conducted in numerous areas such as radar, optical devices, electronic warfare, communications, materials, and fire research.[19] The location of the site outside of congested and industrial areas allows low-background radar testing. The facility has a test control center for both air and sea operations and maintains antenna support towers and a ship motion simulator to support both operations

[14] "About PAX River," U.S. Navy, accessed February 10, 2026, https://ndw.cnic.navy.mil/Installations/NAS-Patuxent-River/About/.
[15] St. Mary's County Government, "St. Mary's County Innovation District Moves Forward with New AeroPark Identity," 1, accessed March 13, 2026, https://www.stmaryscountymd.gov/pio/docs/2021-184NewsReleaseSMCInnovationDistrictNewBranding.pdf.
[16] "TechPort," St. Mary's County Government, accessed March 12, 2026, https://www.yesstmarysmd.com/TechPort/.
[17] "Techport@ The Airport," Architect Magazine, March 26, 2021, accessed March 12, 2026, https://www.architectmagazine.com/project-gallery/techport-the-airport/.
[18] "Naval Research Laboratory, Chesapeake Bay Detachment," NAVFAC, accessed August 18, 2026, https://www.navfac.navy.mil/Divisions/Environmental/Products-and-Services/Environmental-Restoration/Washington/Naval-Research-Laboratory-CBD/.
[19] "Chesapeake Bay Detachment (CBD)," U.S. Naval Research Laboratory, accessed August 18, 2026, https://www.nrl.navy.mil/Our-Work/Field-Sites/Chesapeake-Bay-Detachment-CBD/.

and research projects.[20] Further, fire research conducted at NRL-CBD aims to increase protection for Navy personnel and platforms from damage. The Navy Technology Center for Safety and Survivability (NTCSS) and Joint Maritime Test Facility (JMTF) support research on topics including fire suppression systems, fuels, chemical defense, submarine atmospheres, and damage control for ships and aircraft.[21] The NRL-CBD also disseminates findings from this applied research through technology transfer activities, supporting both government and private industries.[22]

Beyond its defense footprint, energy production, tourism, and agriculture are significant industries within Calvert County. Calvert Cliffs Nuclear Power Plant, which represents the fourth-largest employer in the county, is the only nuclear power generation site in the state.[23] The site currently produces approximately 40 percent of Maryland's total generated power and accounts for 80 percent of clean power generation in the state.[24] Agriculture and aquaculture is also strong in Calvert County, with the fertile soil and abundant coastlines offering diverse opportunities for farming and fishing.[25] The county's rural atmosphere and coastlines also support abundant recreational and tourism opportunities. Solomon's Island is a particular draw, with Navy Recreation Center Solomons offering a scenic vacation destination for military members and their families.[26]

Charles County

Charles County is located roughly 30 miles south of Washington, D.C., with proximity to the Baltimore and Richmond metro areas.[27] This location's access to major highways, airports, railroads, ports, and waterways enables businesses to more easily reach regional, national, and international markets. This location has been an asset for Naval Support Facility Indian Head (NSF Indian Head), sited in the northwest area of the county. Additionally, a seven-mile-long stretch known as the Western Charles Technology Corridor encompasses private businesses,

[20] "Chesapeake Bay Detachment (CBD)," U.S. Naval Research Laboratory.
[21] "U.S. Naval Research Laboratory - Chesapeake Bay Detachment," Maryland Department of Planning, accessed August 18, 2026, https://militarycompatibility.maryland.gov/Pages/Military-Installations-in-Maryland/nrl-chesapeake-bay-home.aspx.
[22] "U.S. Naval Research Laboratory - Chesapeake Bay Detachment," Maryland Department of Planning.
[23] "Major Employers," Calvert County Maryland, accessed August 18, 2026, https://www.calvertcountymd.gov/3209/Major-Employers.
[24] "Constellation Considering Doubling Calvert Cliffs Nuclear Capacity," World Nuclear News, November 4, 2025, accessed August 18, 2026, https://www.world-nuclear-news.org/articles/constellation-considering-doubling-calvert-cliffs-nuclear-capacity.
[25] "Agriculture," Calvert County Maryland, accessed August 30, 2026, https://www.calvertcountymd.gov/3153/Agriculture.
[26] "Navy Recreation Center Solomons," U.S. Navy, accessed August 18, 2026, https://ndw.cnic.navy.mil/Installations/NAS-Patuxent-River/About/Annexes/Navy-Recreation-Center-Solomons/.
[27] "Charles County Living," Charles County Chamber, accessed August 19, 2026, https://www.charlescountychamber.org/charles-county-living/.

research institutions, and educational partners.[28] This concentration of technology, knowledge, and industry serves as an anchoring point for businesses aiming to expand nascent technologies or join larger industry players.[29]

For example, the Energetics Technology Center (ETC) relocated to Indian Head in 2017 to enable collaboration with other stakeholders and advance research.[30] The ETC is a nonprofit center that works with the U.S. Department of Defense, state and local governments.[31] Recently in 2023, NSWC IHD developed an Energetics Comprehensive Modernization Plan to bolster the Navy's infrastructure and manufacturing capabilities to wartime requirements.[32] Over 500 infrastructure projects are planned to help increase the capacity and readiness of U.S. naval munitions to meet any potential surges in demand. Over a 15-year period the Navy is projected to invest $2.7 billion in funding for the infrastructure modernization effort, which is a critical factor in attracting and hosting tenants from both national and international companies who are interested in locating at NSWC IHD.[33]

3.3 Strategic Planning & Regional Challenges

The St. Mary County Department of Economic Development's most-recent Comprehensive Economic Development Strategy (CEDS) plan outlined both opportunities and challenges following the COVID-19 pandemic. As detailed in the report, county leaders are aiming for support and growth for core sectors in aviation, aerospace, unmanned systems, advanced manufacturing, tourism, and agriculture/aquaculture.[34] Three working groups within the county's Economic Development Commission were tasked with updating the 2017 CEDS plan, ensuring that new challenges and opportunities were reflected in the county's goals and strategies. The four main focus opportunity areas identified were workforce development and talent attraction; tech transfer, development, and innovation; local agriculture and seafood; and rural development and quality of place.[35]

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[28] "NSWC Indian Head Division Provides Modernization Update at Community Event," NAVSEA, March 17, 2026, accessed March 24, 2026, https://www.navsea.navy.mil/Media/News/Article-View/Article/4436511/nswc-indian-head-division-provides-modernization-update-at-community-event/.
[29] "Western Charles Technology Corridor," Charles County Economic Development Department, accessed March 16, 2026, https://www.meetcharlescounty.com/western-charles-technology-corridor.
[30] "Energetics Technology Center is Well-Established in Charles County's Western Tech Corridor," Charles County Economic Development Department, accessed March 16, https://www.meetcharlescounty.com/blog/2024/03/21/default/energetics-technology-center-is-well-established-in-charles-county-s-western-tech-corridor/.
[31] "About ETC," Energetics Technology Center, accessed March 16, 2026, https://www.etcmd.com/who-we-are/.
[32] Matt O'Neal, "NSWC IDH Prepares for Modernization," NAVSEA, November 14, 2023, accessed March 24, 2026, https://www.navsea.navy.mil/Media/News/Article/3587879/nswc-ihd-prepares-for-modernization/.
[33] "NSWC Indian Head Division Provides Modernization Update at Community Event."
[34] St. Mary's County Department of Economic Development, "St. Mary's CEDS Update 2022," 1, accessed February 10, 2026, https://www.yesstmarysmd.com/docs/StMarys_CEDS.pdf.
[35] St. Mary's County Department of Economic Development, "St. Mary's CEDS Update 2022," 2.

Since the plan's release, the county has made progress on several initiatives. In June 2025, the St. Mary's County Agriculture and Seafood Brand was launched as part of an effort to strengthen and promote local products.[36] Additionally, the new brand aims to increase and diversify the county's economic growth while highlighting the importance of local land and waterways. Recently in March 2026, a runway expansion at St. Mary's County Regional Airport was completed.[37] This was an important project for both AeroPark and the region, with the expansion accommodating larger aircraft and additional commercial/private aviation services.[38] The runway expansion is one component of the AeroPark renovation, with other priorities including construction of new commercial hangars, flexible spaces for aviation and related businesses, and improved road configuration.[39]

St. Mary's County released a draft of their strategic plan in February 2026, *St. Mary's 2050*, providing more-recent insights on the current environment and planning initiatives.[40] This draft outlined vision themes for the county to help guide growth and development, including provision of resident services (e.g., infrastructure, healthcare, transportation) while balancing a desire to protect and maintain environmental and agricultural resources.[41] Several challenges noted in the report are issues not just for St. Mary's County, but the SoMD Region overall. The lack of affordable housing is one focus of the report, noting factors that have exacerbated the issue including an increase in short-term rentals, seniors aging in place, and an increase in price for both land and materials.[42] Managing growth is a central goal outlined in the 2050 Plan, with a strong desire expressed to have rural areas retain low-density housing while directing development toward established communities with adequate infrastructure.[43] Along with managed growth, the protection of environmental and agricultural resources and serving the St. Mary's community through effective and efficient services were the two other primary vision themes outlined in the 2050 report.

During focus group sessions, participants were asked about any factors that made it difficult to bring new employees and residents to St. Mary's County or the SoMD Region as a whole. Throughout these discussions participants acknowledged housing as a challenge, but these

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[36] St. Mary's County Government, "St. Mary's County Launches Agriculture & Seafood Brand to Support Local Producers," *The Baynet*, June 10, 2025, accessed March 25, 2026, https://thebaynet.com/st-marys-county-launches-agriculture-seafood-brand-to-support-local-producers/.
[37] Chris Van Hollen, "$22 Million Runway Upgrade Completed at St. Mary's Regional Airport," *The Baynet*, March 24, 2026, accessed March 25, 2026, https://thebaynet.com/22-million-runway-upgrade-completed-at-st-marys-regional-airport/.
[38] David M. Higgins II, "AeroPark Set for New Hangars, Road Upgrades," *Southern Maryland Chronicle*, July 23, 2025, accessed March 25, 2026, https://southernmarylandchronicle.com/2025/07/23/aeropark-set-for-new-hangars-road-upgrades/.
[39] Ibid.
[40] St. Mary's County Maryland, "St. Mary's 2050," accessed March 3, 2026, https://www.stmaryscountymd.gov/Docs/SMC_PublicReviewDraft_1_.pdf.
[41] St. Mary's County Maryland, "St. Mary's 2050," 6-7.
[42] St. Mary's County Maryland, "St. Mary's 2050," 18.
[43] St. Mary's County Maryland, "St. Mary's 2050," 11.

concerns were largely overshadowed by other recruitment issues related to local entertainment, amenities, and cultural offerings. The remainder of this subsection will focus on the housing market in the region and other challenges of attracting residents to Southern Maryland.

Housing Challenges

While not isolated to the SoMD Region, housing has become a significant issue for many areas across the country. Between 2011 and 2017, SoMD experienced the highest increase in rent of any Maryland region and the second-highest increase in home prices.[44] In the five-year period between January 2020 and January 2025 that encompassed the COVID-19 pandemic, the Maryland median home price increased by 40.5 percent.[45] The availability of affordable housing has become a continuing challenge for local officials, with a shortage of homes under $300,000 limiting the buying ability for potential middle- and low-income earners and critical employees (e.g., firefighters, nurses, teachers) who would prefer to live in the area.[46] Recent actions—such as priority childcare enrollment for first responders at a new YMCA in St. Mary's County—also highlight efforts to retain essential workers and middle earners in the area.[47]

Figure 8 below shows homeowner costs as a proportion of annual household income, specifically for those with a home mortgage.

Figure 8: Monthly Owner Costs as Percentage of Household Income, 2020-2024 Average

Percentage of Household Income	St. Mary's County	Calvert County	Charles County	Maryland
Less than 20.0 percent	58.2%	48.5%	44.3%	48.4%
20.0 to 24.9 percent	14.0%	16.8%	13.6%	15.0%
25.0 to 29.9 percent	9.2%	10.2%	9.7%	9.9%
30.0 to 34.9 percent	5.3%	6.6%	8.5%	6.7%
35.0 percent or more	13.3%	17.9%	24.0%	20.1%

Sources: RESI, U.S. Census Bureau

As detailed above, the plurality of residents both in SoMD and across the state spent less than 20.0 percent of their income on housing. Interestingly, housing costs decline as a proportion of

[44] Maryland Department of Housing and Community Development, "Maryland Housing Needs Assessment & 10-Year Strategic Plan," 65, accessed June 15, 2026, https://dhcd.maryland.gov/Documents/Other%20Publications/Report.pdf.
[45] Sami Sparber, "How the Pandemic Transformed the Housing Market in 5 Years," Axios, March 10, 2025, accessed August 20, 2026, https://www.axios.com/2025/03/10/covid-home-prices-trends.
[46] J. Bowles, "Attainable Housing or Just Talk? St. Mary's Panel Grapples with Shrinking Starter-home Supply," *The Baynet*, November 19, 2025, accessed March 10, 2026, https://thebaynet.com/attainable-housing-or-just-talk-st-marys-panel-grapples-with-shrinking-starter-home-supply/.
[47] David M. Higgins II, "Rents Ease Slightly but Maryland Housing Gap Widens Over Decades," *Southern Maryland Chronicle*, April 15, 2026, accessed August 20, 2026, https://southernmarylandchronicle.com/2026/04/15/rents-ease-slightly-but-maryland-housing-gap-widens-over-decades/.

household income until increasing for those paying 35.0 percent or more. This represents the second-greatest cohort of homeowners for Maryland, Calvert County, and Charles County, while St. Mary's had a slightly greater proportion of those spending 20.0-24.9 percent on housing costs. This finding suggests that homeowners are somewhat segmented, with the majority of homeowners under the 30 percent threshold for cost-burdened housing.[48] Those spending over 30 percent of their income on housing costs ranged from 18.6 percent in St. Mary's County to 32.5 percent in Charles County.

Comparatively, Figure 9 below illustrates rent as a proportion of annual household income.

Figure 9: Rent as Percentage of Household Income, 2020-2024 Average

Percentage of Household Income	St. Mary's County	Calvert County	Charles County	Maryland
Less than 20.0 percent	31.2%	29.3%	19.5%	23.5%
20.0 to 24.9 percent	13.0%	14.8%	15.2%	13.1%
25.0 to 29.9 percent	10.1%	8.2%	18.9%	11.9%
30.0 to 34.9 percent	7.9%	5.4%	5.8%	9.2%
35.0 percent or more	37.8%	42.4%	40.6%	42.3%

Sources: RESI, U.S. Census Bureau

As shown above, the cost burdens for renters both across the state and in SoMD were significantly greater compared to homeowners. Roughly half of all renters were cost burdened over the period studied—meaning households spent over 30 percent of income on housing—ranging from 45.7 in St. Mary's County to 51.5 percent in the state overall. St. Mary's County had the greatest proportion of renters paying under 20.0 percent of their household income for rent, while Charles County had the lowest rate at 19.5 percent. Within SoMD, renter-occupied housing is more prevalent around Waldorf, La Plata, NAS Patuxent River, Leonardtown, Lexington Park, Mechanicsville, Charlotte Hall, and Lusby, while other areas in the region are predominantly owner-occupied housing.[49,50,51]

Figure 10 below shows additional housing characteristics from the U.S. Census, providing averages for the five-year period between 2020 and 2024.

[48] "About the Gap Report," National Low Income Housing Coalition, accessed June 22, 2026, https://nlihc.org/gap/about.
[49] St. Mary's County, "Attainable Housing - Planning Commission Discussion," 16, accessed May 20, 2026, https://www.stmaryscountymd.gov/docs/SMC_PC1_Housing_25-09-12.pdf?202510071519.
[50] "Charles County, MD Housing Data," Best Neighborhood, accessed June 18, 2026, https://bestneighborhood.org/housing-data-in-charles-county-md/.
[51] "Calvert County, MD Housing Data," Best Neighborhood, accessed June 18, 2026, https://bestneighborhood.org/housing-data-in-calvert-county-md/.

Figure 10: Select Housing Characteristics, 2020-2024 Average

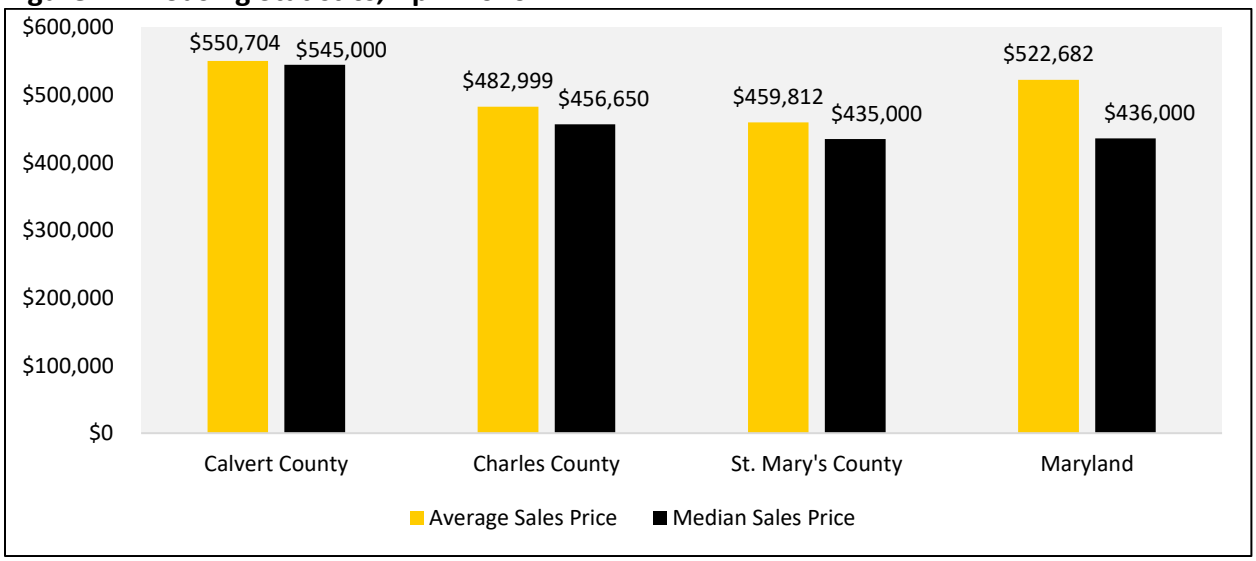
Factor	St. Mary's County	Calvert County	Charles County	Maryland
Total Housing Units	46,385	36,119	63,813	2,560,784
Median House Value (Owner-occupied units)	$407,600	$460,200	$428,500	$419,900
Homeowner Vacancy	1.4%	0.4%	0.6%	0.8%
Rental Vacancy	3.3%	4.2%	5.2%	4.7%
Renter-Occupied Housing Units (% of Occupied Units)	26.8%	12.8%	17.9%	32.4%
Owner-Occupied Housing Units (% of Occupied Units)	73.2%	87.2%	82.1%	67.6%

Sources: Jobs EQ, U.S. Census Bureau

Between 2020 and 2024, Calvert County had the highest median house value at $460,200, significantly greater than the next-highest price in Charles County at $428,500. Further, the county also had the lowest homeowner vacancy rate of 0.4 percent, with Charles County (0.6 percent), Maryland (0.8 percent), and St. Mary's County (1.4 percent) having greater vacancies. St. Mary's County had the greatest proportion of renters in SoMD at 26.8 percent, followed by Charles County (17.9 percent) and Calvert County (12.8 percent).

While the Census's averages provide longer-term trends, the housing market has recently experienced significant price increases that are not as evident in multi-year averages. Data from Maryland Realtors shown in
Figure 11 below captures recent sales data from April 2026 to illustrate current conditions across the SoMD Region.

Figure 11: Housing Statistics, April 2026



Source: Maryland Realtors

As shown above, housing values have increased substantially compared to the five-year averages provided by the Census Bureau. In Calvert County, the median price of $545,000 is a substantial increase from the multi-year value of $460,200. Similarly, Charles County, St. Mary's County, and the state overall also showed significant increases, highlighting the recent shifts and pressures on housing prices. St. Mary's County saw the greatest average price increase from one year earlier (up from $433,019 or 6.2 percent), while Calvert County saw the largest annual increase in median sales price (up from $422,500 or 29.0 percent). Although Calvert County did not have the largest proportional increase in average price, this county currently has both the highest average price ($550,704) and median price ($545,000) in the SoMD Region.

Recent housing market factors for 2026 are outlined in Figure 12 below.

Figure 12: Housing Statistics, April 2026

Factor	Calvert County	Charles County	St. Mary's County	Maryland
Units Sold, 2026	110	213	104	5,728
1-Year Change	+19.6%	+5.4%	-1.9%	-3.3%
New Listings, 2026	164	309	164	7,973
1-Year Change	-14.6%	-13.4%	-11.4%	-15.7%
Active Inventory, 2026	237	536	226	14,584
1-Year Change	-18.8%	-22.1%	-26.4%	-17.7%
Median Days on Market, 2026	14	22	10	12
Median Days on Market, 2025	7	15	9	9

Source: Maryland Realtors

Two SoMD counties (Calvert and Charles) showed an increase in the number of units sold from the previous year, while all SoMD counties showed a decline in the number of new listings compared to a year prior. Across each SoMD county and the state overall, active inventory has decreased by roughly 18 to 26 percent while homes are simultaneously spending more time on the market. Calvert County showed the median listing sitting for double the time compared to a year prior (14 days compared to 7 days), while Charles County listings have stayed on the market for a week longer than in April 2025.

Jurisdictions across the country have sought a variety of creative housing solutions to meet demand, such as the use of existing commercial structures to reduce renovation costs. One town in Wisconsin renovated a vacant school into 20 affordable apartments, made possible by $250,000 in funding from the Wisconsin Economic Development Corporation.[52] In New York, Rockland County's Home Action Loan Opportunity (HALO) Awards offers qualifying borrowers

[52] Tomas Hoppough, "Towns Are Turning Vacant Schools into Affordable Housing," KATC, September 5, 2022, accessed May 18, 2026, https://www.katc.com/news/national/towns-are-turning-vacant-schools-into-affordable-housing.

low-interest loans for the creation or preservation of affordable housing. One of the four initial HALO projects is a $3 million loan for the redevelopment of the former Haverstraw Chair Factory to create 308 affordable units along the Hudson River, with proceeds from these loans flowing back into the program for future opportunities.[53]

Other housing initiatives have involved increasing flexibility around building and expansion, some of which are currently being used or considered in the SoMD Region. Accessory dwelling units (ADUs) have become one popular tool to alleviate pressure on the housing market. These self-contained units can serve several purposes, such as creating additional rental housing units, increasing property values, or providing living spaces for aging relatives. These units are constructed on existing properties and can provide additional financial benefits, such as rental income for older homeowners who are able to downsize. ADUs can be particularly useful in rural regions or areas with limited short-term housing options. In Calvert County, zoning changes made in 2025 allow residents to build ADUs up to 1,500 square feet, increased from the previous maximum of 950 square feet.[54] Notably, building on properties that fall within the Chesapeake Bay Critical Area must still apply for permits regardless of size.[55] Similarly, in Charles County, zoning regulations are currently being updated to expand permissions for ADU construction as part of the county's 2025 affordable housing strategy.[56]

The use of ADUs has become more widespread in recent years, with jurisdictions across the country increasing housing stock using ADUs and related incentives. For example, Anchorage, Alaska residents are now permitted to have on existing single or multi-family properties.[57] Across New York state, multiple counties are offering up to $125,000 for ADU construction, with Albany County residents who build ADUs also eligible for a tax break in 2026.[58] Kansas legislation now allows residents to construct additional units inside or outside of their residence using grants up to $100,000 for low- to medium-income homeowners. The legislation is applicable to houses that are at least 25 years old and homeowners must commit to continue

[53] Beth Cefalu, "County Unveils Housing Action Loan Opportunity (HALO) Awards," Rockland County, January 31, 2025, accessed May 19, 2026, https://www.rocklandcountyny.gov/Home/Components/News/News/647/140?widgetId=3132.
[54] J. Bowles, "New Zoning Rule Changes Let Calvert Homeowners Build More, Permit-Free," *The Baynet*, April 18, 2025, accessed August 19, 2026, https://thebaynet.com/new-zoning-rule-changes-let-calvert-homeowners-build-more-permit-free/.
[55] Bowles, "New Zoning Rule Changes Let Calvert Homeowners Build More, Permit-Free."
[56] Charles County Government, "Accessory Dwelling Units Proposal Targets Housing Shortage in Charles County," *The Baynet*, March 24, 2026, accessed August 19, 2026, https://thebaynet.com/accessory-dwelling-units-proposal-targets-housing-shortage-in-charles-county/.
[57] Patricia Oh, "Increasing Housing Options in Rural Communities," AARP, January 2024, accessed May 18, 2026, https://www.aarp.org/livable-communities/housing/info-2024/rural-lab-housing.html.
[58] Joe Mahoney, "Counties Build Community: Local Leaders Driving Housing Solutions Across New York," New York State Association of Counties, October 6, 2025, accessed May 19, 2026, https://www.nysac.org/news/posts/counties-build-community-local-leaders-driving-housing-solutions-across-new-york//.

occupancy and ownership for five years following the renovation to prevent "flipping" or quick resales.[59]

Some areas have focused on making necessary repairs more accessible for rural residents, such as North Carolina's Urgent Repair Program. In rural regions of the state, over 42 percent of homes were constructed before 1980, leaving many in need of maintenance and repairs. This program has funded home repairs for over 15,000 individuals including low-income seniors, veterans, and those with a disability and has helped individuals to stay in their homes while addressing critical safety or health issues.[60] In addition to repairs, the Low-Income Housing Tax Credit has prompted rural housing development to provide affordable rental units. While Figure 13 shows that housing stock in SoMD is comparatively newer than the state overall, there may be pockets of the region in which repair programs would be impactful.

Figure 13: Age of Housing Stock, 2020-2024 Average

Year Structure Built	St. Mary's County	Calvert County	Charles County	Maryland
2000 - 2020 or later	36.8%	27.5%	34.6%	21.0%
1980 - 2000	33.6%	40.4%	37.1%	27.9%
1950 - 1980	24.0%	25.5%	23.0%	35.5%
Pre-1950	5.6%	6.4%	5.3%	15.7%

Sources: Jobs EQ, U.S. Census Bureau

When discussing housing in the focus groups, several challenges for the SoMD Region were mentioned. Finding available rental housing for interns and younger workers seems to be particularly difficult, as these employees typically have a limited budget and may not be ready for the purchase of a home. Similarly, for those offered a full-time position following an internship, focus group participants reported that it is difficult for these younger workers to afford to live in the region. This particular issue has also been seen in Crane, Indiana (detailed in the case studies, Section 4), that has caused over 10 percent of qualified interns to not accept positions due to the lack of short-term housing in the region.[61] Even for high earners, participants noted that many find the Northern Virginia or D.C. regions to be more attractive. For a similar price, it was stated that the amenities, entertainment, cultural offerings, and dining options were more desirable in other areas.

[59] Jerry Moran, "Sens. Moran, King Reintroduce Legislation to Motivate Rural Housing Construction & Expansion," March 10, 2025, accessed May 18, 2026, https://www.moran.senate.gov/public/index.cfm/2025/3/sens-moran-king-reintroduce-legislation-to-motivate-rural-housing-construction-expansion.
[60] Scott Farmer, "Rural Areas Present Unique Housing Challenges," North Carolina Housing Finance Agency, December 3, 2019, accessed May 19, 2026, https://www.nchfa.com/news/housing-developments-insights-scott-farmer/rural-areas-present-unique-housing-challenges.
[61] Ibid.

Attracting Residents

The most consistent obstacle that was discussed during focus group sessions involved attracting young residents and families to the SoMD Region. Multiple participants said the region struggles to compete with other localities, particularly in the northern Virginia area, largely due to factors that include SoMD's limited cultural and entertainment options, public school quality, and traffic congestion. While the cost of living in both areas is comparable, multiple contributors stated that there are benefits to living in a comparatively more vibrant cultural environment. Additionally, participants noted that even basic amenities, such as dining options outside of base gates, are unavailable and a common complaint among employees. Despite a longer commute, many find that the benefit of living in an area with more amenities is worthwhile.

While the SoMD Region and northern Virginia areas are not geographically distant, there are limited means to travel between these locations. The potential for alternative means such as a ferry connection was brought up during focus group sessions, presenting a topic for further discussion. Since 1964, there have been five studies to examine passenger ferry operations on the Potomac River, most recently in 2013. In a 2009 study, the authors concluded: "The study team found significant potential for a commuter ferry operation to serve that segment of the population currently commuting between Southern Maryland and Virginia. This is especially true for military installations along the Potomac River such as Fort Belvoir, NSF-Indian Head and Quantico Marine Base."[62] A subsequent 2022 study determined that there were multiple feasible routes, including Alexandria to National Harbor, however a lack of secured funding sources halted planning efforts.

Recently in 2025, a Swedish company conducted demonstrations of new electric hydrofoils on the Potomac River, highlighting their no-wake technology and low energy consumption.[63] While there are potential commuter ferries that utilize this new technology with capacity for approximately 30 passengers, no announcements have been made on firm plans to move forward.[64] Additionally, current options for "last-mile travel" across the SoMD counties—particularly to military installations—remains a significant challenge and limits the effectiveness of ferries as a regional transportation opportunity. Despite the logistical hurdles, this demonstration highlights interest in pursuing alternative means of transportation to increase accessibility to the SoMD Region.

Aside from potential new travel routes, there are several ways in which local environments could be improved while limiting growth to established areas. From regional planning

[62] "Potomac River Water Taxis and Commuter Ferry," Virginia Places, last updated October 2025, accessed June 1, 2026, https://www.virginiaplaces.org/transportation/ferrypotomac.html.
[63] Ryan Belmore, "Swedish Company to Demo Flying Electric Ferry on Potomac River," ALX Now, October 15, 2025, accessed June 2, 2026, https://www.alxnow.com/2025/10/15/swedish-company-to-demo-flying-electric-ferry-on-potomac-river/.
[64] Rob Pegoraro, "This Battery-Electric Hydrofoil Could Supercharge a Ferry Transformation," November 7, 2025, accessed June 2, 2026, https://www.fastcompany.com/91425601/candela-boat-electric-battery.

documents, it is clear that many in the SoMD Region greatly value its rural atmosphere and want to preserve these positive attributes.[65] To align with these overarching goals, development efforts could focus on specific locations that have existing infrastructure and activity, such as "outside the gate" food and retail establishments near NAS Patuxent River and NSF Indian Head. Creating localized pockets of development could improve the attractiveness of the working environment and provide more options for employees while also respecting their rural communities.

4.0 Case Study Highlights

Although the SoMD Region has generally benefited from the stability provided by federal employment, disruptions to these sources can leave areas vulnerable to budget cuts or periods of sequestration. RESI explored several regions that have diversified their defense industries to expand beyond federal reliance and grow commercial and private investments. These included areas that were impacted by Base Realignment and Closures (BRAC) and other localities that have expanded commercial operations. While each of these examples has unique regional or local attributes that contributed to their success, they offer potential strategies for stakeholders in SoMD. In general, these strategies include:

- Diversifying private and commercial investments;
- Expanding recruiting and workforce training efforts; and
- Leveraging existing infrastructure and talent to attract new businesses.

Huntsville, Alabama

Huntsville expanded its aerospace industry following the initial rocket builds that took place in the 1950s. These initial efforts helped to launch the first U.S. satellite and first American astronaut in space, establishing Huntsville's historical importance in space exploration.[66] Since that time, the region has leveraged its existing defense and aerospace infrastructure, along with a highly skilled workforce to attract and grow a number of industries. Known as Rocket City, Huntsville has strong aerospace, defense, and engineering sectors with assets such as Redstone Arsenal, a 38,000-acre campus that is home to over 70 organizations including the FBI, NASA (Marshall Space Flight Center), and the U.S. Army.

In 2025, it was announced that U.S. Space Command would also be permanently based at Redstone Arsenal, with approximately 1,400 jobs expected to move to the area in the next five years.[67] Huntsville is also home to Cummings Research Park, the second-largest research park in the U.S. with over 300 companies, space and defense agencies, business incubators, and higher

[65] St. Mary's County Maryland, "St. Mary's 2050," 6-7.
[66] David Hitt, "Yesterday, Today and Tomorrow: How Huntsville, AL, Earned the Name "Rocket City,"" Huntsville/Madison County Convention & Visitors Bureau, accessed February 24, 2026, https://www.huntsville.org/rocket-city/us-space-rocket-center/.
[67] Jerry Underwood, "Alabama's Defense Sector Enters a New Era of Strategic Growth," Made in Alabama, September 9, 2025, accessed March 9, 2026, https://www.madeinalabama.com/2025/09/alabamas-defense-sector-enters-a-new-era-of-strategic-growth/.

educational institutions.[68] Further, within the Huntsville metropolitan statistical area (MSA), the Robotics Technology Park is the country's first robotics training center. The campus includes a 60,000 square foot robotics maintenance facility, client suites provided at no cost for R&D, and a 51,000 square foot facility for production, testing, and modification.[69]

In addition to its aerospace and defense sectors, the region is also growing in advanced manufacturing, automotive manufacturing, and pharmaceutical industries. Companies locating in the region benefit from local infrastructure such as the Port of Huntsville with the largest commercial airport in the U.S., and the Alabama Technology Network, which provides support though workforce training, technical assistance, and engineering services throughout the state.[70] Interest in the area was highlighted in 2025, with Alabama announcing 234 economic development projects totaling a record $14.6 billion in investments.[71] Among these projects is a $6 billion investment by Eli Lilly for a pharmaceutical production facility in Huntsville that is expected to support 450 jobs.

The regional focus on workforce and educational priorities is generally aligned with industry needs, as evidenced by the partnerships and development programs in the area. One example is Calhoun Community College, which is the largest community college in the state and is ranked first nationally in advanced manufacturing degrees, offers programs for both traditional students and those currently in the workforce.[72] Huntsville also draws interest as an educational destination, with attractions that include the U.S. Space & Rocket Center (USSRC). This center is home to the oldest and largest STEM camp worldwide, with Space Camp program alumni including NASA and ESA astronauts and engineers.[73] Additionally, the USSRC serves as the official visitor center for NASA's Marshall Space Flight Center where space enthusiasts have been visiting for decades.[74]

Crane, Indiana

In Crane, Indiana, Naval Weapons Station Crane (NWS Crane, formerly Naval Support Activity Crane) serves as the installation host and provides base operating support and infrastructure for the Naval Surface Warfare Center, Crane Division (NSWC Crane) and Crane Army Ammunition Activity. NWS Crane represents the third-largest naval installation globally and has

[68] "Metro Economy," A Smart Place, accessed February 12, 2026, https://asmartplace.com/metro-economy/.
[69] "Workforce & Training," LCEDA, accessed March 9, 2026, https://lceda.com/employers-workforce/workforce-training/.
[70] "Metro Economy," A Smart Place.
[71] William Thornton, "Alabama Saw Its Highest Ever Economic Development in 2025," January 20, 2026, accessed February 12, 2026, https://www.al.com/news/2026/01/alabama-saw-its-highest-ever-economic-development-in-2025-ivey-says.html.
[72] "Career Training at Calhoun," Calhoun Community College, accessed March 9, 2026, https://calhoun.edu/programs-training/career-training/.
[73] "U.S. Space & Rocket Center," U.S. Space and Rocket Center, accessed February 24, 2026, https://www.rocketcenter.com/aboutus#ourstory.
[74] "U.S. Space & Rocket Center," Huntsville, Alabama, accessed March 9, 2026, https://www.huntsville.org/rocket-city/us-space-rocket-center/.

over 6,000 employees, including more than 3,000 STEM workers and 1,000 engineers.[75] Notably, there are less than 50 military personnel on site, making NWS Crane predominantly a civilian installation.[76] NSWC Crane's mission is to provide acquisition engineering, in-service engineering and technical support for sensors, electronics, electronic warfare, and special warfare weapons.[77] The base was originally slated for closure as part of BRAC in 2005, but after local, state, and national intervention, NWS Crane instead lost approximately 15 percent of employment. Following this reduction, NWS Crane shifted their strategy to diversify and focus on high-tech industries with private interests and building partnerships with higher education institutions.[78]

Outside of NWS Crane, WestGate@Crane Technology Park is a hub of specialized technology with over 60 tenants situated on 750 acres.[79] These tenants include research, development, and educational organizations such as Purdue Research Foundation and Indiana University, all with the collective aim of spurring innovation to meet emerging technological challenges.[80] At WestGate Academy—a 64,000-square-foot space within the park—entrepreneurial support and mentorship is provided including tools for startups, educational opportunities, and workforce development programs.[81] To help grow economic development in the region, a new master plan for WestGate@Crane was adopted in 2021 to focus on the park's assets to drive industry development while preserving the scenic settings of the area.[82] Following the completion of the master plan, the Uplands Science & Technology Foundation (USTF) was created as a nonprofit research foundation to lead the development strategy, attract new firms and activity, and strengthen Crane as a regional asset with a distinct sense of place.[83] Additionally, in 2020, the Crane Regional Defense Group was established to provide citizen-led advocacy for the community on both local and federal levels and help support diversified economic growth in the area.[84]

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[75] "Industries," Martin County Alliance, accessed February 12, 2026, https://www.martinalliance.org/services.
[76] "Naval Support Activity Crane," Military Installations, accessed February 24, 2026, https://installations.militaryonesource.mil/in-depth-overview/naval-support-activity-crane#:~:text.
[77] "NSWC Crane Naval Surface Warfare Center Crane," U.S. Navy, accessed February 12, 2026, https://www.navalsteminterns.us/nreip/labs/nswc_crane.html.
[78] Peter Blanchard, "Crane Naval Base Poised for Growth as Innovation Hub," IBJ, November 24, 2023, accessed March 10, 2026, https://www.ibj.com/articles/crane-naval-base-poised-for-growth-as-innovation-hub.
[79] "Conduit to Crane," WestGate@Crane, accessed March 2, 2026, https://westgatecrane.org/.
[80] Ibid.
[81] Steve Martin, "NSWC Crane to Expand Presence at WestGate Academy," Naval Sea Systems Command, April 20, 2022, accessed February 17, 2026, https://www.navsea.navy.mil/Media/News/Article/3005200/nswc-crane-to-expand-presence-at-westgate-academy/.
[82] Regional Opportunity Initiatives, "WestGate@Crane Master Plan," 4-5, accessed March 10, 2026, https://regionalopportunityinc.org/src-content/uploads/2021/02/20200811_marketing-master-plan-rev-low-rez-1.pdf.
[83] "About USTF," WestGate@Crane Technology Park, accessed March 10, 2026, https://westgatecrane.org/about-us/about-ustf/.
[84] "Crane Regional Defense Group," Crane Regional Defense Group, accessed February 12, 2026, https://www.craneregionaldefensegroup.org/.

In 2021, NSWC Crane became one of three designated entities leading the federal Microelectronics Commons program. This federal initiative aims to streamline laboratory-to-fabrication capabilities for innovative microelectronics, reduce supply chain risks, and strengthen the U.S. position as a global leader in these technologies.[85] More recently in February 2026, the American Center for Manufacturing & Innovation broke ground on a new National Security Industrial Hub at WestGate Academy.[86] This effort, supported by a $75 million federal award from the Munitions Campus Pilot Program, aims to expand domestic munitions and solid rocket motor production capacity and accelerate R&D projects into scalable production.[87] The project also helps to merge government demand with private investment opportunities and modern manufacturing facilities, supporting expansion beyond federal needs. In addition to increasing production capabilities, the investment is expected to strengthen partnerships between local colleges to upskill workers for high-tech jobs.[88]

There are several similarities between St. Mary's County and Martin County, with both areas having a similar industry mix of agricultural, government, manufacturing, and professional, scientific, and technical services.[89] Additionally, local leaders in Martin County have identified barriers to relocation and recruitment such as available housing, broadband access, and healthcare availability, and are working to strengthen placemaking and attracting new residents.[90] An infrastructure assessment of NSWC Crane in 2024 reported that approximately $100 million in infrastructure improvements are needed, including electrical, wastewater, water, and road repairs.[91] Additionally, the installation reported that over 10 percent of qualified interns do not accept positions due to the lack of short-term housing in the region.[92] In addition to a lack of housing diversity, many homes in Martin County (and other nearby southern Indiana counties) would require significant renovations or rehabilitation to become

[85] "The Microelectronics Commons," Microelectronics Commons, accessed March 10, 2026, https://microelectronicscommons.org/about-us/.
[86] Kristen Smith, "ACMI Breaks Ground on Indiana National Security Industrial Hub Banked by $75 DOW Award," GovCon Wire, February 20, 2026, accessed March 10, 2026, https://www.govconwire.com/articles/acmi-groundbreaking-national-security-industrial.
[87] Smith, "ACMI Breaks Ground on Indiana National Security Industrial Hub Banked by $75 DOW Award."
[88] Will Peppers, "Ground Broken at WestGate Academy for New National Security Industrial Hub," WZDM, February 22, 2026, accessed March 10, 2026, https://www.wzdm.com/2026/02/22/ground-broken-at-westgate-academy-for-new-national-security-industrial-hub/.
[89] "Welcome to the Martin County Alliance, Inc.," Martin County Alliance, accessed February 12, 2026, https://www.martinalliance.org/.
[90] Martin County, Indiana, "Quality of Place & Workforce Attraction Plan," 10, accessed February 17, 2026, https://regionalopportunityinc.org/src-content/uploads/2020/01/martin-qpat-plan-complete-reduced-file-size-1.pdf.
[91] Matt Craig, "It's Your Business: Crane Commander Shares Future Plans with Southern Indiana Partners," The Herald-Times, December 13, 2024, accessed March 10, 2026, https://www.heraldtimesonline.com/story/business/columns/2024/12/13/naval-support-activity-crane-radius-indiana-share-southern-indiana-housing-resilience-initiative/76923227007/.
[92] Ibid.

move-in-ready options for potential employees in the area.[93] These reflect some of the same challenges found in St. Mary's County, with housing availability being a notable barrier to recruitment efforts.

BRAC realignment

Several US counties and regions have successfully transitioned away from high dependence on federal agency and defense spending by leveraging Base Realignment and Closure (BRAC) processes to redevelop military, aerospace, and technology sectors. Examples include areas in Maine, Colorado, and Washington, which converted shuttered bases into commercial business hubs, while cities like Colorado Springs diversified by merging military presence with AI and cybersecurity.

Kelly Air Force Base to Port San Antonio

Kelly Air Force Base had long been an economic cornerstone in the San Antonio region when the 1995 Base Realignment and Closure (BRAC) IV Commission announced its planned closure in 2001.[94] The site had a long history of aviation with flight activity starting in 1917 and grew quickly with the onset of WWI.[95] Between the announcement and actual closure, a special redevelopment authority now known as Port San Antonio was created.[96] This independent authority was created to take ownership of the 1,900-acre complex, as required by Texas law, and repurpose the former base. This redevelopment authority had the task of converting the former base into a driver of local economic activity while preserving jobs, utilizing existing infrastructure, and expanding private and commercial opportunities. Port San Antonio is currently led by a board of directors and a president and CEO responsible for strategic growth and operations management.[97]

Port San Antonio has a number of infrastructure assets that have helped facilitate growth, including an airport, rail access, ground transportation hub, and easy access to three interstate highways.[98] Further, the entire port is covered by foreign trade zone designation which helps businesses to reduce or defer import costs.[99] Private companies including Boeing, Lockheed Martin, and StandardAero established operations in former Air Force facilities and continued

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[93] "Project Summary," Southern Indiana Housing Resilience Initiative, accessed March 10, 2026, https://www.incrementaldevelopment.org/sidc-project.
[94] Art Leatherwood and Laurie E. Jasinski, "History of Kelly Air Force Base: From Military Aviation Pioneer to Port San Antonio," Texas State Historical Association, April 4, 2018, accessed February 4, 2026, https://www.tshaonline.org/handbook/entries/kelly-air-force-base.
[95] Ibid.
[96] "Transition Era," Kelly Heritage Foundation, accessed January 22, 2026, https://kellyheritage.org/transition-era.
[97] Iris Gonzalez, "Transforming Kelly AFB: From Military Base to Job-Growth Engine," San Antonio Report, January 20, 2017, accessed February 2, 2026, https://sanantonioreport.org/transforming-kelly-afb-from-military-base-to-job-growth-engine/.
[98] "Port of Entry: Port San Antonio," Texas Comptroller, accessed February 4, 2026, https://comptroller.texas.gov/economy/economic-data/ports/2024/port-san-antonio.php.
[99] "Foreign Trade Zone (FTZ)," City of San Antonio, accessed February 4, 2026, https://www.sa.gov/Directory/Departments/EDD/Programs-Grants/Industry-Business-Development/FTZ.

maintenance work on military aviation platforms.[100] This continuity in the transition allowed many former Kelly AFB employees to retain jobs on site and created momentum for repurposing other areas on the property. Following the 2005 BRAC period, thousands of workers from the Department of Defense were consolidated in the San Antonio region, prompting $60 million in upgrades at the Port to accommodate new headquarter facilities.[101] The Port has expanded substantially in the past decade, with approximately 750,000 square feet of new office space built since 2017 to accommodate 8,000 new employees.[102]

There are currently more than 80 companies at Port San Antonio that represent both public and private tenants, generating over $5 billion in regional impacts annually.[103] These tenant companies employ approximately 14,000 workers across 2 million square feet of facilities.[104] Today, Port San Antonio is not only a major center of aviation and aerospace maintenance and modifications, but also has advanced technology sectors including robotics, AI, and cybersecurity that are central to the Port's strategic vision. The skilled workforce in the region and available facility space has also supported advanced manufacturing growth, offering means to customize facilitates and tap into efficient supply chains for global distribution.[105] Further, the strong presence of U.S. Air Force agencies has also attracted contractors that serve both federal and private aviation needs.

McClellan Air Force Base to McClellan Business Park

With a history of employing both military and civilian personnel, McClellan Air Force Base was in operation for 65 years before its closure in 2001.[106] However, in 1995 McClellan Air Force Base was included in the BRAC and was slated for closure in 2001, impacting 11,600 employees on site.[107] Local officials had to contend with not only funding shifts, but also extensive environmental remediation of a Superfund site.[108] During its operational history, the primary mission of the base included the maintenance, management, and repair of aircraft, as well as electronics and communication equipment.[109] In 1987, the base was added to the U.S. Environmental Protection Agency's (EPA's) National Priorities List due to hazardous

[100] "Transition Era," Kelly Heritage Foundation, accessed January 22, 2026, https://kellyheritage.org/transition-era.
[101] Ibid.
[102] Eric Killealea, "Running Out of Room: As Port San Antonio Faces Latest Space Crunch, It Looks to An Elevated Future," Port San Antonio, October 17, 2023, accessed February 2, 2026, https://www.portsanantonio.us/elevated-future.
[103] "Transition Era," Kelly Heritage Foundation.
[104] Killealea, "Running Out of Room: As Port San Antonio Faces Latest Space Crunch, It Looks to An Elevated Future."
[105] "Transition Era," Kelly Heritage Foundation.
[106] "Former McClellan Air Force Base (BRAC 2001)," Air Force Civil Engineer Center, accessed February 4, 2026, https://www.afcec.af.mil/Home/BRAC/McClellan-AFB/.
[107] "History," McClellan Park, accessed February 10, 2026, https://www.mcclellanpark.com/about/history.
[108] "Former McClellan Air Force Base (BRAC 2001)," Air Force Civil Engineer Center.
[109] "McClellan Air Force Base (Ground Water Contamination) Cleanup Activities," U.S. Environmental Protection Agency, accessed February 5, 2026, https://cumulis.epa.gov/supercpad/SiteProfiles/index.cfm?fuseaction=second.cleanup&id=0902759.

contaminants in groundwater and soil.[110] Over 350 contaminants were found at the site, including industrial solvents, radium paint, combustion waste product, pesticides, toxic metals, and polychlorinated biphenyls (PCBs), as well as fuel spills and other pollutants.[111] Cleanup efforts have included groundwater remediation, soil vapor and contamination extraction, and protective capping.[112]

In the years between the announcement and planned 2001 closure the area experienced a substantial economic decline, with development shuttered and the region losing approximately $1.5 billion in economic activity annually.[113] In an effort to stop the economic blight around the base, several key participants entered into public-private partnerships and began a business transition process. The U.S. Air Force, Sacramento County, and a new McClellan transition team coordinated the entry of several select businesses into existing infrastructure at the park, helping to preserve some employment and change the outcome trajectory.[114] This was a significant moment for the site that changed its trajectory, enabling the start of a reimagined economic driver for the region.

McClellan Business Park is currently home to a mix of private companies and federal, state, and local government agencies. The area has attracted $580 million for infrastructure and building improvements, comprised of both public and private investments. [115] McClellan Park has a number of amenities to support tenants, including hotel and dining options, gas and retail centers, EV charging stations, retired and active-duty Military services, and shuttle options.[116] As of late 2025, approximately 95 percent of available industrial space at McClellan Park was leased, highlighting demand for its prime location and attributes.[117] However, with entitlements for six million square feet of new buildings and the capacity for 35,000 workers, the park still has the ability to support substantial new growth.[118]

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[110] Susan Wolbarst, "Innovation Pays Off at McClellan Business Park," Energy, Installations, and Environment, September 10, 2010, accessed February 10, 2026, https://www.safie.hq.af.mil/News/Article-Display/Article/402043/innovation-pays-off-at-mcclellan-business-park/.
[111] Barbara Zumwalt, "McClellan: From Polluted Air Base to Productive Business Park," Department of Toxic Substances Control, December 2018, accessed February 5, 2026, https://dtsc.ca.gov/mcclellan-success/.
[112] "McClellan Air Force Base (Ground Water Contamination) Cleanup Activities," U.S. EPA.
[113] "Then and Now: McClellan Park's History," Sacramento McClellan Airport, accessed February 10, 2026, https://airport.mcclellanpark.com/news/mcclellan-park-history.
[114] Ibid.
[115] "History," McClellan Park.
[116] "Amenities & Services," McClellan Park, accessed June 2, 2026, https://www.mcclellanpark.com/discover/amenities-and-services.
[117] Ben van der Meer, "Southland Industries leases 107,000 square feet at McClellan Park, pushing industrial occupancy to 95%," Sacramento Business Journal, November 12, 2025, accessed June 2, 2026, https://www.bizjournals.com/sacramento/news/2025/11/12/southland-industries-mcclellan-park.html.
[118] "History," McClellan Park.

5.0 Data Analysis

This section provides an overview of workforce statistics and projections for the SoMD Region. Overall, regional data provides a picture of a bifurcated labor market. On one end are highly specialized occupations in research, engineering, and technology that require many years of experience and offer higher-than-average wages. On the other end are core industries such as healthcare, education, food service, farming, and aquaculture that typically vary in education requirements and offer average or below-average wages. Additionally, limited employment growth in these industries presents a challenge, as most projected job demand is expected to stem from separations and transfers rather than net job creation, as seen in occupational projections through 2035.

To conduct the data analysis, RESI used JobsEQ labor market software with data from the SoMD counties and the state overall. JobsEQ aggregates data from several sources including the U.S. Bureau of Economic Analysis, the Bureau of Labor Statistics, U.S. Census Bureau, and O*NET to provide accurate economic data and forecasts.[119] This analysis is based on data through Q3 2025, the most up to date information available at the time of the analysis. All data are based upon a four-quarter moving average. Figure 14 below shows the industries with the highest employment levels in SoMD.

Figure 14: SoMD Industry Snapshot, Top 10 Industries 2025

Industry	Employment	Average Annual Wages	Employment Change 2015-2025
National Security	12,221	$127,564	214
Elementary and Secondary Schools	10,359	$62,685	1198
Engineering Services	6,277	$117,797	162
Full-Service Restaurants	5,313	$26,703	1004
Limited-Service Restaurants	4,688	$23,829	-199
Other General Government Support	4,287	$72,842	1,378
General Medical and Surgical Hospitals	2,970	$82,593	-52
Supermarkets and Other Grocery Retailers (except Convenience Retailers)	2,948	$33,512	-121
Offices of Physicians (except Mental Health Specialists)	2,224	$87,987	56
Department Stores	2,092	$28,162	-166

Sources: JobsEQ, RESI

[119] "About," Chmura, accessed June 29, 2026, https://www.chmura.com/about.

In total, there were 126,014 workers across all three counties, with the top 10 industries accounting for 42 percent of all employment in SoMD. Notably, six of the top ten industries (*Elementary and Secondary Schools, Full-Service Restaurants, Limited-Service Restaurants, Other General Government Support, Supermarkets and Other Grocery Retailers, and Department Stores*) paid below the state's annual average of $78,209. The other four industries (*National Security, Engineering Services, General Medical and Surgical Hospitals, and Offices of Physicians*) earned above-average wages, and were characterized by specialized skillsets in defense, engineering, and healthcare.

5.1 Industry Concentration and County Level Highlights

RESI also examined the most concentrated industries in SoMD to assess where regional strengths exist and identify potential opportunities for expansion in niche sectors. To evaluate concentration, location quotients (LQs) were analyzed for each county and the region overall. An LQ is a statistical measure used to compare the concentration of a particular industry in a region to the national average, with interpretations described below.

- LQ > 1.0: The industry is more concentrated locally than the national average.
- LQ = 1.0: The industry has the same concentration locally as it does nationally.
- LQ < 1.0: The industry is less concentrated locally than the national average.

Figure 15 below shows the most concentrated industries in SoMD in 2025 based on their LQ.

Figure 15: SoMD Highest Concentration Industries

Industry	Employment	LQ	Average Annual Wages	Employment Change
Nuclear Electric Power Generation	920	28.8	$166,980	214
National Security	12,221	28.0	$127,564	214
Farm Product Warehousing and Storage	159	19.9	$52,579	146
Other General Government Support	4,287	12.3	$72,842	1,378
Shellfish Farming	22	11.0	$27,432	4
Facilities Support Services	1,152	7.6	$104,299	816
Regulation of Agricultural Marketing and Commodities	479	7.5	$109,579	340
Engineering Services	6,277	6.5	$117,797	162
Shellfish Fishing	36	5.8	$30,280	0
Deep Sea Freight Transportation	42	5.8	$127,160	42

Sources: JobsEQ, RESI

Notably, several of the highly concentrated industries shown above did not have very high employment levels. While *National Security, Engineering Services*, and *Other General Government Support* represented 18 percent of the workforce, the rest of the highly concentrated industries only comprised approximately 2 percent of the SoMD workforce. A high LQ paired with a low employment level may reflect niche specialization or large amounts of capital investments.

At the county level, SoMD's economic structure varied with each county exhibiting different industry strengths and workforce characteristics. For detailed county industry snapshot tables, please refer to Appendix A.

Figure 16: St. Mary's County Industry Snapshot

Industry	Employment	LQ	Average Annual Wages	Employment Change 2015-2025
Top Employment				
National Security	9,872	55.3	$129,758	1,006
Engineering Services	5,750	14.5	$118,696	1,710
Most Concentrated				
National Security	9,872	55.3	$129,758	1,006
Shellfish Farming	20	25.5	$26,554	19

Sources: JobsEQ, RESI

In St. Mary's County, high concentrations in *National* Security and *Engineering Services* reflect the county's strong defense contracting and technical workforce base. Both industries experienced substantial employment growth between 2015 and 2025, adding 1,006 and 1,710 jobs, respectively. *National Security* was also the most concentrated industry in St. Mary's County, followed by *Shellfish Farming*. Notably, *Shellfish Farming* has a very low employment count and high LQ, signaling that this is a niche industry within the region and a relatively small industry at the national level. Further, nearly all existing *Shellfish Farming* employment was created within the last decade, with 19 of the 20 total jobs being added between 2015 and 2025.

Figure 17: Calvert County Industry Snapshot

Industry	Employment	LQ	Average Annual Wages	Employment Change 2015-2025
Top Employment				
Elementary and Secondary Schools	2,471	1.9	$70,870	-128
Full-Service Restaurants	1,380	1.7	$27,087	-87
Most Concentrated				
Nuclear Electric Power Generation	920	143.0	$166,982	236
Electric Bulk Power Transmission and Control	149	24.8	$135,653	149

Sources: JobsEQ, RESI

In Calvert County, *Elementary and Secondary Schools* and *Full-Service Restaurants* were the top employment industries, reflecting the core role of education and food service in the regional economy. *Nuclear Electric Power Generation* was the most concentrated industry and one of the highest paying industries in SoMD, though total employment in the industry was relatively small. *Electric Bulk Power Transmission and Control* was even smaller in terms of employment count, with just 149 employees and a high location quotient of 24.8. Despite their relatively small employment bases, both energy-related industries experienced notable growth between 2015 and 2025, with *Nuclear Electric Power Generation* adding 236 jobs and *Electric Bulk Power Transmission and Control* adding 149 jobs. The latter industry's employment gain is equal to its current employment level, suggesting that it emerged or began establishing a significant presence in the county during the past decade.

Figure 18: Charles County Industry Snapshot

Industry	Employment	LQ	Average Annual Wages	Employment Change 2015-2025
Top Employment				
Elementary and Secondary Schools	4,648	1.9	$57,611	622
Full-Service Restaurants	2,479	1.6	$26,789	12
Most Concentrated				
Farm Product Warehousing and Storage	158	50.9	$52,608	146
Other General Government Support	2,099	15.5	$79,354	328

Sources: JobsEQ, RESI

The Charles County workforce represented a more service-based economy. *Elementary and Secondary Schools* along with *Full-Service Restaurants* comprised up a large share of employment and have grown over the past decade. *Farm Product Warehousing and Storage* and *Other General Government Support* exhibit strong regional concentrations compared to national averages. Among these, *Other General Government Support* provides relatively high average wages and added 328 jobs between 2015 and 2025, while *Farm Product Warehousing and Storage* added 146 jobs during the same period.

Major employers in each county can be seen in the following section.

5.2 Major Employers in SoMD

This section provides an overview of the leading employers in SoMD. The top three employers across the region are *Naval Air Station Patuxent River (NAS Patuxent River), Naval Support Facility (NSF) Indian Head,* and *CalvertHealth Medical Center*. Together, these organizations account for approximately 12 percent of the SoMD workforce. A breakdown of major employers by county can be seen in the following tables.

Figure 19: St. Mary's County Major Employers, 2024-2025

Employer	Product/Service	Employment
NAS Patuxent River	Military Installation	10,000
MedStar St. Mary's Hospital	Hospital System	1,200
KBR	Logistics, Engr., Oper. Mgmt.	1,000
V2X	Tech. Products, and Services	1,000
Lockheed Martin	Advanced Tech. Systems	675
BAE Systems	Tech. Products and Services	600
GDIT	Engineering, IT, Management	600
Precise Systems	Engineering, IT, Management	600
J.F. Taylor	Systems Engr. and Services	520
St. Mary's College of Maryland	Higher Education	500

Source: Maryland Department of Commerce, RESI

The St. Mary's employer base is anchored by *NAS Patuxent River*. The installation employs 10,000 workers, which is more than eight times the size of the second largest employer in the county, *MedStar St. Mary's Hospital*. Beyond these two organizations, the county's major employers are heavily concentrated in defense-related industries, including engineering, aerospace, IT, cybersecurity, logistics, and management services. Healthcare represents the largest non-defense employer category. Compared with other SoMD counties, St. Mary's County is the most reliant on federal defense activity, with many of its largest employers supporting the defense contracting ecosystem.

Figure 20: Charles County Major Employers, 2024-2025

Employer	Product/Service	Employment
NSF Indian Head	Military Installation	3,544
University of Maryland Charles Regional Medical Center	Medical Services	911
College of Southern Maryland	Higher Education	691
Walmart/Sam's Club	Retail	638
Waldorf Chevy/Cadillac, Honda, Ford, Toyota/Scion, Dodge	Retail	560
Southern Maryland Electric Cooperative (SMECO)	Energy Products and Services	534
Safeway	Retail	425
Lowe's	Retail	320
Chick-fil-A	Restaurants	301
Target	Retail	300

Source: Maryland Department of Commerce, RESI

In Charles County, *NSF Indian Head* serves as a major economic anchor, accounting for approximately 3,544 jobs. However, the remaining major employer jobs are spread across healthcare, retail, education, utilities, restaurants, distribution, and residential care services. Healthcare is particularly prominent among the county's largest employers, with the *University of Maryland Charles Regional Medical Center* providing substantial employment (911 workers). Compared with other SoMD counties, Charles County appears less dependent on defense contracting and more oriented toward core industries such as healthcare and retail.

Figure 21: Calvert County Major Employers, 2024-2025

Employer	Product/Service	Employment
CalvertHealth Medical Center	Medical and Healthcare Services	1,283
Constellation Calvert Cliffs Clean Energy Center	Nuclear Power Generation	660
Giant Food	Grocery Retail	375
Wal-Mart	Consumer Goods	326
Green Tree Health Care	Long-Term Care, Nursing Care & Assisted Living	261
Safeway (Dunkirk & Prince Frederick)	Grocery Retail	231
The Gott Company: Q-Dog Fuel, Fastop, Magic Tunnel Car Wash	Fuel/Convenience Stores/ Car Wash	206
Berkshire Hathaway Energy Company: Cove Point LNG	Liquefied Natural Gas Export Facility	205
The Arc of Southern Maryland	Intellectual & Developmental Disability Assistance	201
Rod 'N' Reel Resort	Hospitality, Gaming & Marina	200

Source: Maryland Department of Commerce, RESI

Calvert County's largest employer is *CalvertHealth Medical Center*, which employs approximately 1,283 workers, followed by *Constellation's Calvert Cliffs Clean Energy Center* with 660 employees. Other significant employers include major grocery retailers, healthcare providers, energy facilities, residential care centers, and hospitality businesses. Healthcare represents a particularly important sector within the county's economy. Healthcare or related human services in Calvert County include hospitals, nursing and residential care facilities, and services for individuals with intellectual and developmental disabilities.

Altogether, major employers in SoMD reflect the region’s economic diversity and the unique strengths of each county. St. Mary’s County is anchored by defense and engineering activity centered on *NAS Patuxent River*, while Charles County maintains a more balanced mix of government, healthcare, and retail employment. Calvert County’s employment base is led by healthcare, energy, retail and hospitality industries. Together, these employment patterns

highlight the importance of federal installations, energy, healthcare, and retail industries as the primary drivers of the SoMD economy.

5.3 SoMD Qualification Gaps

RESI also examined existing qualification gaps to gain insight into potential workforce challenges within SoMD. Figure 22 highlights the top skill gaps across SoMD, showing where employer demand is expected to exceed the available workforce.

Figure 22: Top 10 Qualification Gaps in SoMD, 2025

Skill or Qualification	Candidates	Openings	Gap
Secret Clearance	128	259	-131
Mathematics	276	385	-109
Working With Children – Education/Childcare	86	187	-101
Teaching/Training, Job	246	329	-83
Sales	275	349	-74
Teaching/Training, School	515	573	-58
Bilingual	57	109	-52
System Integration	22	64	-43
Food Preparation	185	221	-35
Marketing	78	107	-28

Sources: JobsEQ, RESI

The largest regional shortfall for many defense-related jobs was qualifying for the *Secret Clearance* requirement. The other top skills gaps further reflect the footprint of service-based work within the SoMD economy. Gaps in *Mathematics* are mainly represented by *Retail Sales Workers, Cooks* and *Food Preparation Workers*, and *Information and Record Clerks*. The skill gap in *Working with Children – Education/Childcare* and *School-related Teaching/Training* reflects shortages in education, childcare and coaching occupations, while *Sales and Job-based Teaching/Training* highlight challenges in retail and administrative services. Additional skill gaps include *Bilingual, System Integration, Food Preparation,* and *Marketing.*

There are several issues impacting worker's ability to obtain *Secret Clearance.* Conflicting state and federal marijuana laws may limit the pool of workers eligible for *Secret Clearance*, as past or current marijuana use can disqualify some candidates. A 2020 survey found that 20 percent of respondents had declined to apply to a federal job due to restrictive cannabis policies, while 10 percent withdrew their application based on these policies.[120] While some agencies have relaxed their hiring guidelines to accommodate more applicants, 25 percent of survey respondents stated they would not seek employment requiring a security clearance in the future due to the federal marijuana policy.[121]

[120] Kyle Jaeger, "Many Young Adults Won't Apply for Federal Jobs Due to Cannabis Policies," Filter, May 19, 2023, accessed March 25, 2026, https://filtermag.org/marijuana-federal-employment/.
[121] Ibid.

Focus group participants also highlighted the lengthy administrative process required to obtain *Secret Clearance*. Some participants reported declines in applicant pools driven because of the lengthy onboarding processes, and reduced interest in federal employment stemming from recent uncertainty within the government. Despite these challenges, participants indicated that they continue to receive an adequate number of applications and are generally able to identify qualified candidates. However, the region's rural character can make it more difficult to attract and retain skilled workers who are willing to live and work in SoMD. The primary occupations impacted by this requirement are *Computer Occupations*, *Software Developers*, and *Secretaries and Administrative Assistants*.

Although the largest skill gaps by count occur in *Secret Clearance* and *Mathematics*, *System Integration* represented the most constrained labor market, with only 22 candidates available for the 64 job openings. This suggests that specialized technical skills face the greatest relative shortage despite having fewer total openings. Many of the top skill gaps in the region are also represented amongst the occupations projected to have the largest shortages through 2035. The following subsection provides an overview of projected industry growth and occupation gaps.

5.4 SoMD Industry Growth

Figure 23 shows total demand projections for SoMD's largest industries over the next ten years. For context, total demand is the sum of projected growth demand and separation demand. Separation demand consists of job openings created by workers exiting the labor force, including retirements and workers transferring to other occupations. Growth demand reflects the increase or decrease in employment resulting from the expansion or contraction of an industry's overall workforce. By 2035, job openings created by employee exits and transfers are expected to drive demand, resulting in a total demand of 57,409 positions over the projection period.

Figure 23: SoMD Largest Industries Growth Projections, 2025 to 2035

Industry	Exits	Transfers	Growth	Total Demand
National Security	3,921	5,526	-564	8,882
Elementary and Secondary Schools	4,770	4,943	-150	9,563
Engineering Services	1,824	2,823	265	4,912
Full-Service Restaurants	4,059	5,153	71	9,284
Limited-Service Restaurants	3,996	4,916	126	9,039
Other General Government Support	1,718	2,273	17	4,007
General Medical and Surgical Hospitals	1,120	1,172	78	2,370
Supermarkets and Other Grocery Retailers (except Convenience Retailers)	2,052	2,392	-76	4,368
Offices of Physicians (except Mental Health Specialists)	842	957	132	1,931
Department Stores	1,377	1,652	24	3,053
Total	**25,679**	**31,807**	**-77**	**57,409**

Sources: JobsEQ, RESI

Several of the industries listed are projected to see slight expansion between 2025 and 2035, with growing industries adding approximately 71 jobs to the SoMD economy each year on average. The industry with the greatest net job growth is projected to be *Engineering Services* with 265 new positions, followed by *Offices of Physicians* (132 jobs) and *Limited-service Restaurants* (126 jobs).

Conversely, net employment growth is projected to be negative for the *National Security*, *Elementary and Secondary Schools*, and *Supermarkets and Other Grocery Retailers* industries, with an average loss of 79 jobs annually across the three industries between 2025 and 2035. The *National Security* industry is projected to contract the most between 2025 and 2035, with a loss of 564 jobs projected during the ten-year period.

5.5 Projected Occupational Gaps

Figure 24 identifies projected occupation gaps over the next 10 years in SoMD. Across all occupation groups listed, the majority of job demand will be due to replacements for exiting workers rather than new employment growth.

Figure 24: Projected Occupation Gaps, 2025 to 2035

Occupation	Supply Gap	Growth Demand	Total Separations	Total Demand	Total Projected Employment
Management Occupations	-480	390	8,610	9,000	11,700
Computer and Mathematical Occupations	-350	490	2,810	3,300	5,544
Construction and Extraction Occupations	-330	280	5,130	5,410	6,578
Installation, Maintenance, and Repair Occupations	-280	110	4,050	4,150	4,748
Healthcare Practitioners and Technical Occupations	-250	320	3,810	4,140	7,382
Business and Financial Operations Occupations	-140	110	8,010	8,120	10,442
Architecture and Engineering Occupations	-140	90	2,670	2,760	4,331
Healthcare Support Occupations	-90	240	5,350	5,590	4,048
Transportation and Material Moving Occupations	-30	350	10,082	11,170	8,699
Production Occupations	-20	-70	2,420	2,350	2,158
Building and Grounds Cleaning and Maintenance Occupations	-20	60	5,670	5,730	4,271
Arts, Design, Entertainment, Sports, and Media Occupations	-10	20	1,660	1,680	1,825

Sources: Jobs EQ, RESI

As illustrated above, the greatest gaps are projected for *Management Occupations*, *Computer and Mathematical Occupations*, and *Construction and Extraction Occupations*. Employees in these occupations can work in a variety of industries based on local needs. Figure 25 below shows the primary industries that are driving demand for the occupations with the greatest projected employment gaps.

Figure 25: Industries Driving Demand for Occupations with the Largest Supply Gaps, 2025 to 2035

Industry Title	Exits	Transfers	Growth	Total Demand
National Security and International Affairs	2,560	3,536	-315	5,781
Architectural, Engineering, and Related Services	1,486	2,346	232	4,064
Building Equipment Contractors	967	1,638	147	2,752
General Medical and Surgical Hospitals	852	878	79	1,809
Computer Systems Design and Related Services	559	946	356	1,860
Services to Buildings and Dwellings	1,199	1,499	13	2,711
Elementary and Secondary Schools	953	949	-15	1,887
Executive, Legislative, and Other General Government Support	716	941	21	1,678
Offices of Physicians	589	683	141	1,413
Management, Scientific, and Technical Consulting Services	478	759	141	1,377
Grocery and Convenience Retailers	786	1,086	62	1,934
Other Specialty Trade Contractors	468	696	62	1,226

Source: JobsEQ, RESI

The projected occupational gaps identified in Figure 24 have implications across a diverse set of industries. *National Security and International Affairs* and *Architectural, Engineering, and Related Services* are expected to be the primary drivers of demand for occupations projected to face the most significant labor shortages. *National Security and International Affairs* ranks first, generating demand for an estimated 5,781 workers, followed by *Architectural, Engineering, and Related Services* with demand for 4,064 workers. Although employment in *National Security and International Affairs* is projected to decline by 315 jobs by 2035, workforce demand will remain substantial due to the large number of workers expected to exit the labor force or transfer to other occupations. In contrast, *Architectural, Engineering, and Related Services* is projected to grow by 232 jobs over the period, further increasing hiring needs. *Computer Systems Design and Related Services* is expected to experience the strongest employment growth, adding 356 jobs by 2035. Other industries with notable projected demand include *Building Equipment Contractors* (2,752 workers), *Services to Buildings and Dwellings* (2,711 workers), and *Grocery and Convenience Retailers* (1,934 workers).

5.6 Statewide Labor Force Projections

The trends seen in SoMD are reflective of a broader trend at the state level. Figure 26 below shows projected employment demand across major industries in Maryland, highlighting a labor market characterized by minimal or negative employment growth overall. While total industry employment is projected to decline slightly, demand remains substantial due to replacement needs rather than net job creation. A large share of projected openings reflects exits from the workforce, underscoring that much of the hiring activity will be focused on maintaining existing capacity rather than expanding it. This trend also indicates that employers will potentially

compete for existing workers rather than replacing retirees or labor force departures. As retirements accelerate, some focus group participants anticipated a potential workforce "cliff" in the future, with insufficient personnel available to fill leadership and other critical positions. This challenge underscores the importance of workforce development and talent attraction initiatives to ensure continuity in key occupations and industries.

Figure 26: Projected Industry Growth in Maryland, 2025 to 2035

Industry	Total Demand	Exits	Transfers	Employment Growth	Annual Growth
Health Care and Social Assistance	456,134	222,023	222,970	11,141	0.2%
Professional, Scientific, and Technical Services	265,493	99,754	148,687	17,052	0.5%
Educational Services	256,090	128,927	137,637	-10,475	-0.4%
Retail Trade	346,545	165,674	197,948	-17,077	-0.6%
Public Administration	216,732	100,219	134,164	-17,651	-0.7%
Accommodation and Food Services	394,151	176,334	220,625	-2,808	-0.1%
Construction	158,892	63,528	94,520	843	0.0%
Administrative and Support and Waste Management and Remediation Services	202,627	88,598	115,989	-1,960	-0.1%
Transportation and Warehousing	146,703	66,357	82,846	-2,501	-0.2%
Other Services (except Public Administration)	150,795	67,062	84,959	-1,226	-0.1%
Total - All Industries	**3,129,724**	**1,404,737**	**1,751,874**	**-3,389**	**-0.1%**

Sources: JobsEQ, RESI

Overall, the table above emphasizes that Maryland's workforce challenge is less about rapid expansion and more about replacement, retention, and reskilling—particularly in essential sectors that underpin public services and economic stability. Another important consideration when evaluating occupational growth is the expected impact of AI on certain job roles, such as computer-related occupations. While U.S. Bureau of Labor Statistics (BLS) projections capture the impacts of technological change, they assume that the rate at which these changes impact employment will be consistent with historical patterns. However, the models used by BLS are not equipped to capture rapid technological change.[122] While experts factor in potential AI impacts, the extent to which this technology will fully replace certain jobs versus changing their daily role is yet to be determined.

[122] "Incorporating AI Impacts in BLS Employment Projections: Occupational Case Studies," U.S. Bureau of Labor Statistics, February 2025, accessed March 19, 2026, https://www.bls.gov/opub/mlr/2025/article/incorporating-ai-impacts-in-bls-employment-projections.htm.

6.0 Conclusion

Based on the analysis of historical and projected workforce trends, several strategies emerged to support the economic development of the SoMD Region. Workforce development efforts should focus on strengthening and retaining the existing skilled workforce considering anticipated retirements and other workforce exits. Focus group feedback also highlighted the need for additional housing options, including affordable housing for interns and early career workers to improve talent attraction and retention. Across all focus groups, participants also consistently identified a lack of cultural amenities as a challenge to recruiting and keeping workers in the region.

Despite workforce and quality-of-life challenges, the region possesses several assets that support future economic development, including a highly skilled workforce, partnerships among educational institutions, industry, and government, and infrastructure that facilitates research and innovation. The AeroPark District provides an opportunity to strengthen technology transfer and support the growth of private-sector firms connected to the region's defense and aviation industries.

The region can also capitalize on emerging opportunities in energetics and advanced manufacturing. Growth associated with the broader energetics ecosystem presents an opportunity to expand specialized industries, attract investment, and create new career pathways. Supporting this growth will require continued alignment of education and training with industry needs, as well as ongoing engagement with employers to identify workforce challenges and opportunities.

Finally, the region should pursue strategies that diversify and expand local industries, particularly those that provide employment opportunities for workers with varying levels of education and training. Building on initiatives such as the St. Mary's Seafood brand, there may be an opportunity to strengthen seafood processing, distribution, and other related activities. Additional growth potential may be found in aquaculture, agriculture, tourism, and related sectors, which can broaden the region's economic base, create more accessible employment opportunities, and enhance long term economic resilience.

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Appendix A—Detailed Demographic and Industry Tables

A.1 Detailed Demographic Tables

Figure 27: Age and Gender, 2020-2024 Average

Demographic Factor	St. Mary's County	Calvert County	Charles County	Maryland
Population[123]	115,126	94,313	170,527	6,206,011
Average Annual Population Growth	0.5%	0.4%	1.3%	0.5%
Male	50.4%	49.9%	48.2%	48.7%
Female	49.6%	50.1%	51.8%	51.3%
Median Age (Years)	37.2	40.8	38.9	39.4
Under 18 Years	23.9%	23.1%	23.9%	22.2%
18 to 24 Years	8.6%	7.7%	8.3%	8.5%
25 to 34 Years	14.0%	11.5%	12.5%	13.2%
35 to 44 Years	13.9%	13.5%	13.7%	13.6%
45 to 54 Years	12.0%	12.7%	13.9%	12.6%
55 to 64 Years	13.5%	15.1%	14.1%	13.3%
65 to 74 Years	8.4%	9.7%	8.5%	9.9%
75 Years and Over	5.6%	6.7%	5.2%	6.8%
Working-age Population (18-64 Years)	71,433	57,115	106,455	3,795,770

Sources: Jobs EQ, U.S. Census Bureau

Figure 28: Race and Ethnicity, 2020-2024 Average

Demographic Factor	St. Mary's County	Calvert County	Charles County	Maryland
Race				
White	71.3%	75.0%	33.4%	48.2%
Black or African American	14.6%	12.2%	49.3%	29.4%
American Indian and Alaska Native	0.1%	0.2%	0.6%	0.4%
Asian	2.7%	1.9%	3.3%	6.6%
Native Hawaiian and Other Pacific Islander	0.0%	0.0%	0.1%	0.0%
Some Other Race	2.1%	1.5%	2.5%	6.9%
Two or More Races	9.2%	9.1%	10.8%	8.5%
Ethnicity				
Hispanic or Latino (Any Race)	6.1%	5.2%	7.9%	12.5%

Sources: Jobs EQ, U.S. Census Bureau

[123] Note that population data only are from 2025, while other factors are from the ACS five-year averages.

Figure 29: Select Housing Characteristics, 2020-2024 Average

Factor	St. Mary's County	Calvert County	Charles County	Maryland
Total Housing Units	46,385	36,119	63,813	2,560,784
Median House Value (of owner-occupied units)	$407,600	$460,200	$428,500	$419,900
Homeowner Vacancy	1.4%	0.4%	0.6%	0.8%
Rental Vacancy	3.3%	4.2%	5.2%	4.7%
Renter-Occupied Housing Units (% of Occupied Units)	26.8%	12.8%	17.9%	32.4%
Owner-Occupied Housing Units (% of Occupied Units)	73.2%	87.2%	82.1%	67.6%

Sources: Jobs EQ, U.S. Census Bureau

Figure 30: Housing Statistics, April 2026

Factor		St. Mary's County	Calvert County	Charles County	Maryland
Units Sold	2026	104	110	213	5,728
	1-Year Change	-1.9%	+19.6%	+5.4%	-3.3%
Average Sales Price	2026	$459,812	$550,704	$482,999	$522,682
	1-Year Change	+6.2%	+5.3%	+1.0%	+0.3%
Median Sales Price	2026	$435,000	$545,000	$456,650	$436,000
	1-Year Change	+6.1%	+29.0%	+3.1%	+0.2%
New Listings	2026	164	164	309	7,973
	1-Year Change	-11.4%	-14.6%	-13.4%	-15.7%
Active Inventory	2026	226	237	536	14,584
	1-Year Change	-26.4%	-18.8%	-22.1%	-17.7%
Median Days on Market	2026	10	14	22	12
	2025	9	7	15	9

Source: Maryland Realtors

Figure 31: Highest Level of Educational Attainment at 25+ Years, 2020-2024 Average

Educational Attainment	St. Mary's County	Calvert County	Charles County	Maryland
No High School Diploma	6.0%	4.1%	4.6%	8.3%
High School Graduate	25.5%	25.5%	27.2%	22.3%
Some College, No Degree	20.4%	22.1%	23.7%	17.2%
Associate Degree	9.2%	9.2%	9.1%	7.1%
Bachelor's Degree	22.2%	22.5%	19.6%	24.0%
Postgraduate Degree	16.8%	16.7%	15.7%	21.0%

Sources: Jobs EQ, U.S. Census Bureau

Figure 32: School Report Card 2025 – High School Indicators

Indicator	Possible Points	Calvert	Charles	St. Mary's	Maryland
Academic Achievement	30	18.8	12.4	16.1	15.1
Graduation Rate	15	14.2	13.7	13.7	13.2
Progress in Achieving English Language Proficiency	10	2.9	1.9	3.4	2.3
Readiness for Post-Secondary Success	10	9.6	7.6	9.1	8.7
School Quality and Student Success	35	21.2	15.6	17.6	16.6

Sources: Maryland State Department of Education, RESI

Figure 33: School Report Card 2025, Educational Proficiency by County

Achievement - All Students	Math – Percent Proficient			English Language Arts		
	Elementary	Middle	High	Elementary	Middle	High
Southern Maryland						
Calvert County	50.9%	28.2%	36.0%	63.5%	64.3%	86.1%
Charles County	26.2%	13.9%	14.6%	40.8%	43.2%	47.6%
St. Mary's County	41.7%	33.5%	31.5%	52.9%	57.1%	68.6%
State Overall						
Maryland	36.7%	23.1%	30.0%	48.3%	51.2%	60.3%
High-Ranking Counties						
Howard County	52.5%	43.1%	54.0%	62.6%	65.1%	68.2%
Montgomery County	47.0%	29.8%	41.4%	53.7%	57.5%	59.5%

Sources: Maryland State Department of Education, RESI

Figure 34: Select Employment and Income Characteristics, 2020-2024 Average

Factor	St. Mary's County	Calvert County	Charles County	Maryland
Labor Force Participation Rate (LFPR)	67.5%	66.1%	69.2%	66.9%
Work from Home	17.5%	18.5%	16.4%	19.3%
Armed Forces Labor Force	3.2%	1.5%	1.5%	0.8%
Veterans, Age 18-64	12.9%	9.4%	11.6%	4.9%
Median Household Income	$119,446	$133,922	$122,816	$103,678
Per Capita Income	$53,417	$57,710	$51,110	$52,979
Poverty Level (of all people)	8.0%	3.9%	6.9%	9.4%
Households Receiving Food Stamps/SNAP	11.2%	5.1%	9.7%	11.2%

Sources: Jobs EQ, U.S. Census Bureau

Figure 35: Commuting Characteristics, 2020-2024 Average

Factor	St. Mary's County	Calvert County	Charles County	Maryland
Worked in State of Residence	94.1%	86.8%	73.5%	87.4%
Worked in County of Residence	80.0%	52.2%	48.6%	62.4%
Worked Outside County of Residence	14.1%	34.6%	25.0%	24.9%
Worked Outside State of Residence	5.9%	13.2%	26.5%	12.6%
Commute Less than 30 Minutes	60.9%	39.5%	34.5%	51.3%
Commute 30-60 Minutes	25.8%	35.4%	36.3%	36.0%
Commute Over 60 Minutes	13.2%	25.0%	29.1%	12.7%
Mean Travel Time to Work (Minutes)	30.4	40.7	43.1	31.5

Sources: Jobs EQ, U.S. Census Bureau

A.2 Detailed Industry Tables

Figure 36: St. Mary's County Highest Employment Industries

Industry	Employment	LQ	Average Annual Wages	Employment Change 2015-2025
National Security	9,872	55.3	$129,758	1,006
Engineering Services	5,750	14.5	$118,696	1710
Elementary and Secondary Schools	3,240	1.2	$63,721	535
Computer Systems Design Services	1,465	4.1	$115,253	53
Full-Service Restaurants	1,454	0.9	$26,192	38
Limited-Service Restaurants	1,444	1.0	$23,067	95
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	1,409	7.9	$130,037	452
General Medical and Surgical Hospitals	1,136	0.6	$93,142	13
Facilities Support Services	1,054	17.0	$109,301	896
Administrative Management and General Management Consulting Services	1,008	3.3	$114,414	-368

Source: JobsEQ, RESI

Figure 37: St. Mary's County Most Concentrated Industries

Industry	Employment	LQ	Average Annual Wages	Employment Change 2015-2025
National Security	9,872	55.3	$129,758	1,006
Shellfish Farming	20	25.5	$26,554	19
Facilities Support Services	1,054	17.0	$109,301	896
Engineering Services	5,750	14.5	$118,696	1,710
Other Support Activities for Air Transportation	375	8.5	$97,906	-777
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	1,409	7.9	$130,037	452
Home and Garden Equipment Repair and Maintenance	19	7.5	$51,293	16
Shellfish Fishing	18	7.2	$27,813	-15
Printing and Writing Paper Merchant Wholesalers	25	7.2	$51,106	25
Regulation of Agricultural Marketing and Commodities	181	6.9	$62,268	50

Source: JobsEQ, RESI

Figure 38: Charles County Highest Employment Industries

Industry	Employment	LQ	Average Annual Wages	Employment Change 2015-2025
Elementary and Secondary Schools	4,648	1.9	$57,611	622
Full-Service Restaurants	2,479	1.6	$26,789	12
National Security	2,263	13.3	$118,796	495
Other General Government Support	2,099	15.5	$79,354	328
Limited-Service Restaurants	2,075	1.5	$25,114	-105
Department Stores	1,140	4.0	$29,030	-248
Junior Colleges	1,088	5.9	$56,644	90
Supermarkets and Other Grocery Retailers (except Convenience Retailers)	1,022	1.3	$35,516	1
Offices of Physicians (except Mental Health Specialists)	999	1.1	$84,974	-8
General Medical and Surgical Hospitals	897	0.5	$73,650	-99

Source: JobsEQ, RESI

Figure 39: Charles County Most Concentrated Industries

Industry	Employment	Average Annual Wages	LQ	Employment Change 2015-2025
Farm Product Warehousing and Storage	158	$52,608	50.9	146
Other General Government Support	2,099	$79,354	15.5	328
Deep Sea Freight Transportation	42	$127,680	14.8	42
National Security	2,263	$118,796	13.3	495
Ice Manufacturing	24	$40,604	10.9	9
Regulation of Agricultural Marketing and Commodities	206	$134,724	8.2	201
Other Performing Arts Companies	25	$23,769	7.0	24
Regulation, Licensing, and Inspection of Miscellaneous Commercial Sectors	198	$156,121	6.4	161
Cafeterias, Grill Buffets, and Buffets	157	$25,957	6.2	109
Junior Colleges	1,088	$56,644	5.9	90

Source: JobsEQ, RESI

Figure 40: Calvert County Highest Employment Industries

Industry	Employment	LQ	Average Annual Wages	Employment Change 2015-2025
Elementary and Secondary Schools	2,471	1.9	$70,870	-128
Full-Service Restaurants	1,380	1.7	$27,087	-87
Other General Government Support	1,238	17.7	$67,626	602
Limited-Service Restaurants	1,169	1.7	$22,490	279
Supermarkets and Other Grocery Retailers (except Convenience Retailers)	1,096	2.7	$33,636	198
General Medical and Surgical Hospitals	937	1.0	$78,366	-89
Nuclear Electric Power Generation	920	143.0	$166,982	236
Department Stores	482	3.2	$28,643	-6
Offices of Physicians (except Mental Health Specialists)	401	0.9	$78,310	-164
Child Care Services	378	2.0	$34,234	-74

Source: JobsEQ, RESI

Figure 41: Calvert County Most Concentrated Industries

Industry	Employment	Average Annual Wages	LQ	Employment Change 2015-2025
Nuclear Electric Power Generation	920	$166,982	143.0	236
Electric Bulk Power Transmission and Control	149	$135,653	24.8	149
Direct Mail Advertising	120	$46,085	23.9	-85
Other General Government Support	1,238	$67,626	17.7	602
Locksmiths	63	$45,655	14.5	22
Offices of Physicians, Mental Health Specialists	203	$98,794	12.7	111
Other Electric Power Generation	9	$156,278	12.0	9
Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing	22	$54,666	9.8	3
Other Nonresidential Exterior Contractors	43	$61,948	9.7	12
Finfish Fishing	16	$38,432	8.0	-3

Source: JobsEQ, RESI

Appendix B—Focus Groups Structure

To contextualize the preliminary findings from the data analysis and literature review, the Project Team organized three targeted focus groups. These sessions were meant to contextualize specific critical issues discovered in the preliminary research.

A strategic participant matrix was developed to ensure balanced representation across Calvert, Charles, and St. Mary's counties. Initial prospects were identified, and participants were recruited from three distinct cohorts outlined in the Statement of Work:

- *Group 1: Small to Medium-sized Businesses (SMEs)*
  Focusing on niche innovation, lifecycle support, pipeline challenges, and identifying gaps in the regional supply chain.
- *Group 2: Medium to Larger Businesses (Primes)*
  Focusing on large-scale Navy RDT&E, managing large employee pipelines, regional competition, and broader economic shifts.
- *Group 3: Navy and Federal Installations*
  Targeting leadership from NAWCAD, NSWC IHD, and NSF Indian Head to focus on full-spectrum mission readiness, localized specialization, demographic shifts, and long-term strategic needs (5–10 years).

The questioning methodology used a "funnel effect" to guide participants from broad regional trends down to highly specific local challenges. The questioning models were structured in three distinct phases:

- *Validating the Broad "What"*
  Opening questions that ask participants to confirm overarching data regarding current vacancies, 5- to 10-year occupational forecasts, and broad industry growth potential.
- *Identifying the Narrower "Why"*
  Transition questions to diagnose the root causes of the data, such as determining if workforce gaps are primarily "structural" (e.g., lacking specific engineering degrees) or "demographic" (e.g., an aging workforce retiring faster than they can be replaced).
- *Drilling Down into the Specific "How"*
  Targeted key questions that address localized barriers, including geographic grounding (e.g., the impact of rural commutes and housing shortages) and the "Military-Civilian filter" (e.g., the specific bottleneck of hiring entry-level, uncleared talent versus fully cleared experts).

To make sure the discussions were built directly on the initial data, the Project Team prepared specific follow-up questions. Based on the research and preliminary findings from the quantitative analysis, several questions and themes emerged. These questions are outlined below.

Focus Group Questions

The "Military-Civilian" Filter and Security Clearances

While the data shows a need for technical roles, researchers are highly interested in the specific bottleneck caused by Department of Defense clearance requirements.

- *Questions of interest:* When recruiting new graduates versus experienced professionals, what specific barriers do you face in acquiring entry-level, uncleared talent compared to fully cleared experts? How is the competition for labor shifting between the 'cleared' Defense Industrial Base and 'uncleared' commercial technology or engineering sectors in the region? Has the federal employment environment changed with regard to attractiveness of positions or difficulty filling roles?

Diagnosing Structural vs. Demographic Gaps

To understand why large-scale Navy RDT&E pipelines are facing high turnover and long vacancies, investigators want to pinpoint the root causes of the talent shortage and accurately forecast 5- to 10-year needs.

- *Questions of interest:* Are the current workforce shortages primarily "structural" (a lack of candidates with the right degrees and certifications) or "demographic" (an ageing workforce retiring faster than they can be replaced)? As you forecast technological needs for 2031 to 2036, what new, specialized skills will be absolutely mandatory for the incoming workforce?

Non-Industry Barriers, Infrastructure, and Geography

The team is focusing on how localized, non-industry hurdles—specifically spatial variations between urban and rural areas—create a "trapped" workforce and hinder retention.

- *Questions of interest:* What are the biggest non-industry barriers (such as housing stock availability or a lack of affordable childcare) to recruiting employees and attracting businesses to the region? How do localized geographic barriers, such as the commute from rural areas to installation gates, limit access to the broader Tri-County labor pool?

Economic Shifts and Dual-Use Technology Expansion

Researchers want to understand how employers are reacting to federal reliance and exploring opportunities in commercial markets.

- *Questions of interest:* How have federal funding shifts over the past year impacted operations? Regarding the focus on dual-use technologies (for both government and commercial use), what specializations are seeing the most commercial interest, and what are the barriers to expanding them in the SoMD Region? [124]

END OF DOCUMENT

[124] St. Mary's County Department of Economic Development, "St. Mary's CEDS Update 2022," 11.

Southern Maryland Workforce Study

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Shelby Francis
Senior Economist
Regional Economic Studies Institute

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Study Objectives

- Identify workforce requirements and talent gaps
- Assess recruitment and retention challenges
- Examine long-term workforce trends (2025-2035)
- Explore opportunities for economic diversification
- Support workforce alignment for regional employers and defense installations

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Southern Maryland's Economic Foundation

The Southern Maryland economy is anchored by defense, engineering, and government support industries.

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- Regional assets include:
  - NAS Patuxent River
  - NSF Indian Head
  - NRL Chesapeake Bay Detachment

- Strong concentration of research, engineering, and technical talent
- Defense activity remains the region's primary economic engine

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Workforce Strengths and Risks

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Strengths

- High-wage defense and engineering jobs
- Skilled workforce
- Research institutions and defense labs

Risks

- Federal funding uncertainty
- Workforce separations
- Heavy dependence on defense spending

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Demographic & Workforce Snapshot



Key Population Characteristics

- Regional population of 379,966
- Charles County is the fastest-growing county (1.3% from 2020-2024)
- Median incomes exceed Maryland averages
- Large veteran population across all three counties
- Educational attainment generally trails statewide levels

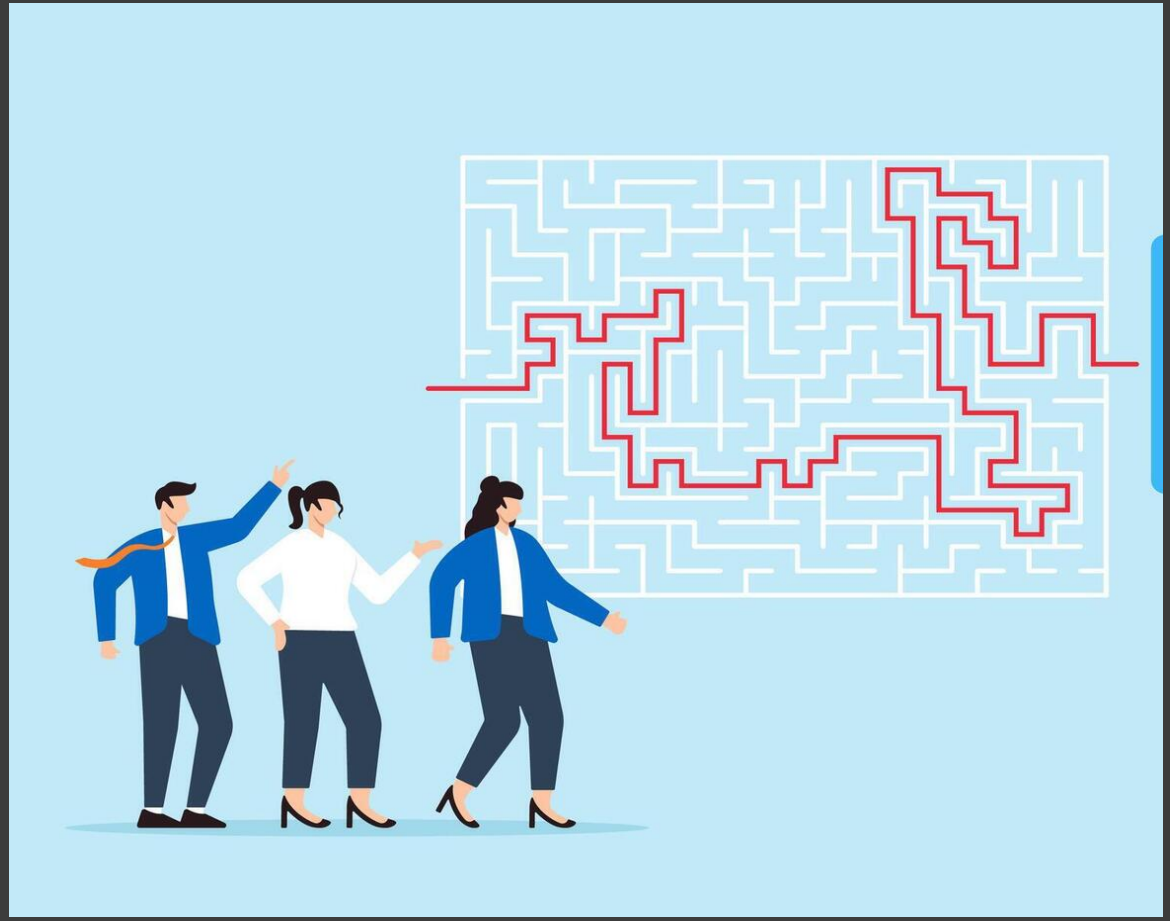
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Recruitment Challenges

Focus group participants identified:

- Housing affordability challenges
- Limited housing options for interns and early-career workers
- Competition from Northern Virginia and D.C.
- Limited dining, entertainment, and cultural amenities
- Lengthy administrative processes



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The Workforce Cliff

The biggest workforce challenge may be replacing talent rather than creating jobs.

- VERA retirements accelerated workforce departures
- Significant loss of institutional knowledge
- Difficulty replacing experienced technical workers
- Concerns over leadership succession
- Increasing replacement demand across industries

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Southern Maryland's Labor Market

Large differences exist between specialized and service-sector employment opportunities.

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High-Wage Sectors

- National Security
- Engineering Services
- Energy Production
- Government Support

Lower-Wage Sectors

- Education
- Food Service
- Retail
- Agriculture & Aquaculture

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Industry Concentration (2025Q3)

Industry	Employment	LQ	Average Annual Wages
Nuclear Electric Power Generation	920	28.8	$166,980
National Security	12,221	28.0	$127,564
Farm Product Warehousing and Storage	159	19.9	$52,579
Other General Government Support	4,287	12.3	$72,842
Shellfish Farming	22	11.0	$27,432
Facilities Support Services	1,152	7.6	$104,299
Regulation of Agricultural Marketing and Commodities	479	7.5	$109,579
Engineering Services	6,277	6.5	$117,797
Shellfish Fishing	36	5.8	$30,280
Deep Sea Freight Transportation	42	5.8	$127,160

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Workforce Qualification Gaps (2025Q3)

Skill or Qualification	Candidates	Openings	Gap
Secret Clearance	128	259	-131
Mathematics	276	385	-109
Working With Children (Education/Childcare)	86	187	-101
Teaching/Training, Job	246	329	-83
Sales	275	349	-74
Teaching/Training, School	515	573	-58
Bilingual	57	109	-52
System Integration	22	64	-43
Food Preparation	185	221	-35
Marketing	78	107	-28

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Workforce Demand Through 2035

Workforce demand will be driven primarily by replacement needs, not expansion.

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Largest projected growth:

- Engineering Services (+265)
- Offices of Physicians (+132)

Largest projected declines:

- National Security (-564)
- Elementary & Secondary Schools (-150)

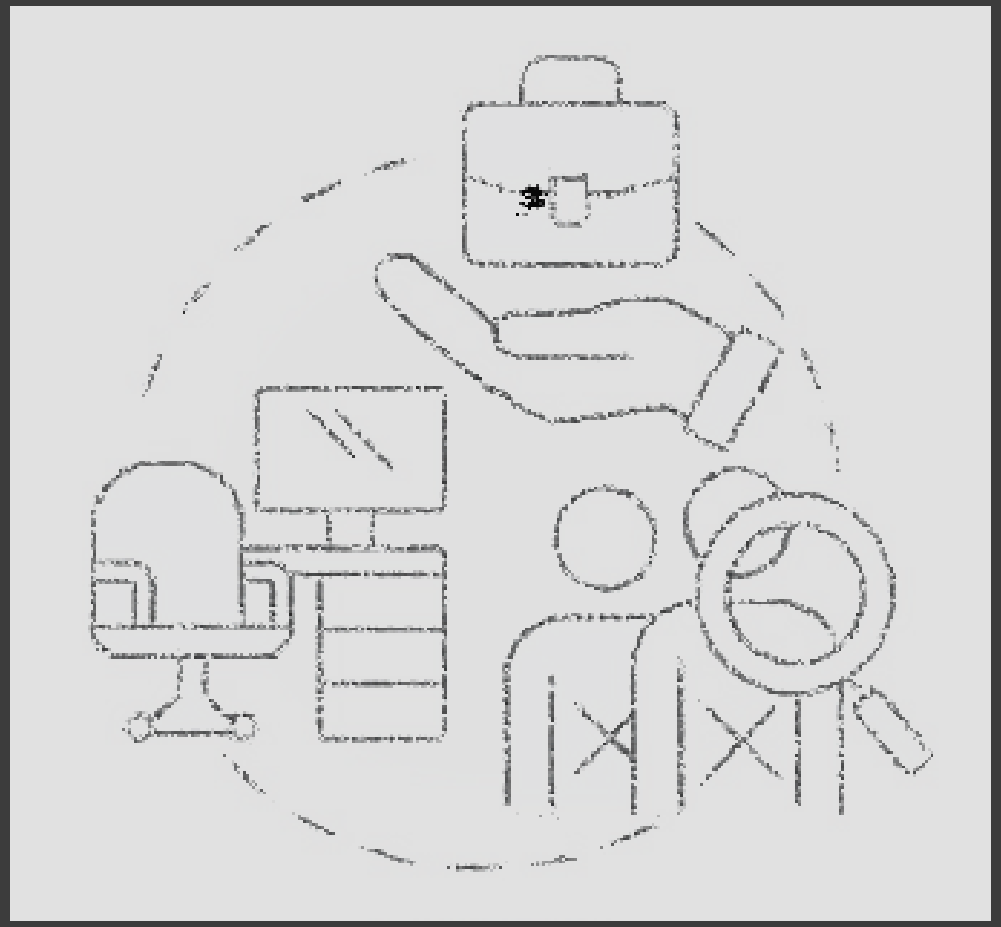
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Projected Occupation Shortages (2025 to 2035)

Greatest expected shortages:

- Management Occupations (-480)
- Computer & Mathematical Occupations (-350)
- Construction & Extraction (-330)
- Installation, Maintenance & Repair (-280)
- Healthcare Practitioners (-250)



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Lessons from Other Regions

Successful regions shared common strategies:

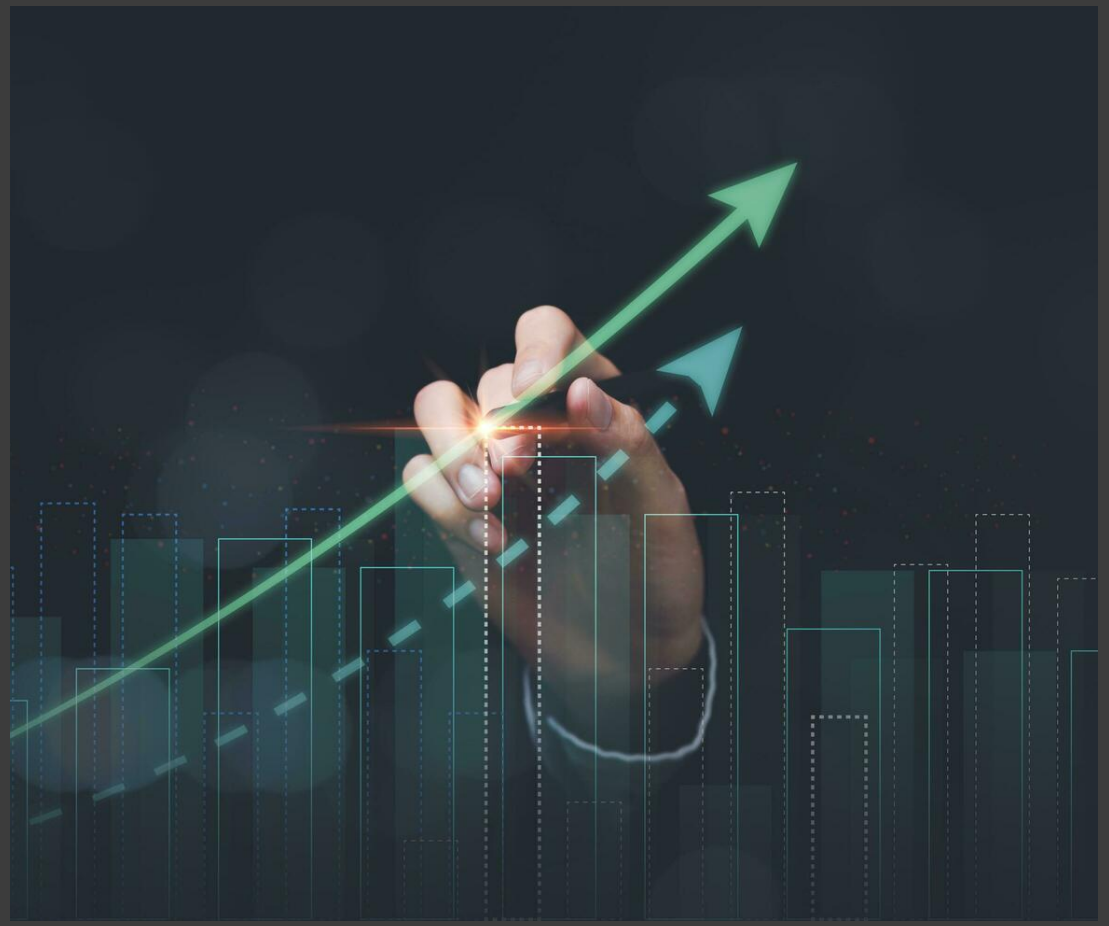
- Diversified beyond federal spending
- Built research and innovation ecosystems
- Expanded industry partnerships
- Invested in workforce development
- Leveraged existing defense assets

Examples: Huntsville, Alabama, Crane, Indiana, Port San Antonio, McClellan Business Park

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Opportunities for Future Growth



- Aerospace and aviation expansion
- Technology transfer and dual-use technologies
- Energetics and advanced manufacturing
- Healthcare growth
- Agriculture and aquaculture
- Tourism and seafood-related industries

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Key Takeaways

To promote long-term economic competitiveness, Southern Maryland should focus on four strategic priorities:

1. Prepare for workforce separations.
2. Improve housing and quality-of-place amenities.
3. Expand education and industry partnerships.
4. Diversify workforce while leveraging defense assets.

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Economic Development Commission - Jul 15 2026 Minutes

Wednesday, July 15, 2026 at 6:00 PM

Chesapeake Building Commissioners Conference Room, 41770 Baldridge Street, Leonardtown, MD

1. CALL TO ORDER

2. ROLL CALL

A. Roll Call

Members present:
Curtis Brown
Dr. Asif U Dowla
Mark Harris
Matthew Burgan
Richard Tarr
Leona Charles
Jacob Keller
Dr. Dale L. Moore

Members not present
Nicholas Hooper
Dr. Rupan Talukder
Dr. Silvio Borrero Caldas
Lisa Colavito

St. Mary's County Economic Development Staff present
Cindy Greb, Director
Kellie Hinkle, Deputy Director

B. Welcome new member, Mark Harris

3. PRESENTATIONS

Southern Maryland Navy Alliance

Dr. Dale L. Moore and James Bolin, Executive Vice President, presented the EDC with information on the Southern Maryland Navy Alliance (SMNA) and the Maryland Aerospace and Technology Commission (MATC).

The SMNA is a non-profit private organization dedicated to increasing awareness, fostering collaborations and building partnerships with other Department of Defense affiliates, industry partners, nonprofits, and academic institutions that advance U.S. Naval Aviation at the Naval Air Station, Patuxent River, Maryland.

The SMNA focuses on advocating for policy, programs, and fiscal resources that enhance the strategic importance and long-term viability for the installation components and surrounding community. This will help meet the Department of Defense and Joint warfare mission capabilities and readiness requirements globally while sustaining and growing the economic viability of the region.

The MATC was created to promote innovation in the fields of space exploration and commercial aerospace opportunities, including the integration of space, aeronautics, and aviation industries into the economy of the State. Initially the MATC will develop a strategic plan with the goal to create designated aerospace and technology zones in the State.

SMNA MATC July 2026 EDC Mtg - update 9 July 2026.pdf

4. OLD BUSINESS

A. Approval of Minutes

Economic Development Commission - Apr 15 2026 - Minutes - Public - DRAFT - 041526.docx

I move to approve the minutes of the April 15, 2026 Economic Development Commission (EDC)

Moved by: Curtis Brown; seconded by: Asif Dowla

Motion Carries

B. Resolution/By-law Updates

John Houser, Deputy County Attorney, informed the Commission that the Commissioners of St. Mary's County voted on July 14, 2206 to approve a Resolution to Amend Membership of the EDC. Current membership will not change, however when terms renew or expire, voting members will be appointed to fill industry/sector positions consisting of :
(1) One (1) representative of the defense/commercialization of defense technologies industries;
(2) One (1) representative of the unmanned and autonomous systems industries;
(3) One (1) representative of the advanced manufacturing industries;
(4) One (1) representative of the aviation and aircraft modification industries;
(5) One (1) representative of the agriculture and aquaculture industries;
(6) One (1) representative of the tourism industry;
(7) One (1) representative of the small business community;
(8) One (1) representative of the institutions of higher learning;

(9) Three (3) other representatives with experience and knowledge relevant to the economic development of St. Mary's County.
As well as the following non-voting ex officio members:
(1) One (1) designee from Naval Air Warfare Center Aircraft Division Patuxent River; and
(2) One (1) designee from the St. Mary's County Chamber of Commerce.

Additionally, the Commissioners of St. Mary's County may designate one (1) alternative with experience and knowledge relevant to the economic development of St. Mary's County to sit on the Economic Development Commission in the absence of any voting member.

EDC - Resolution Amending Membership - APPROVED by CSMC - 071426.pdf

5. NEW BUSINESS

A. Housing Solutions Discussion

Matt Burgan outlined his St. Mary's County 2030 Prosperity Strategy which he drafted compiling concerns from citizens of how St. Mary's County is approaching growth and also articulating the need for smart intentional growth. Mr. Burgan is actively seeing input to strengthen this document.

The EDC would like to see this information included in the Comprehensive Economic Development Strategy (CEDS). Cindy Greb announced that as part of the approved FY27 Budget, the CEDS will begin an update and/or rewrite.

M Burgan - THE ST. MARY'S 2030 PROSPERITY STRATEGY - White Paper - 071326.pdf

I move to review the St. Mary's County 2030 Prosperity Strategy and provide input to Mr. Burgan for further discussion at the October 2026 EDC Meeting.

Moved by: Curtis Brown; seconded by: Dr Dale Moore

Motion Carries

B. DED Program Updates

Ms. Greb announced that the Commissioners approved the FY27 Budget which includes funding to update the CEDS.

The St. Mary's 2050 Comprehensive Plan is at the Planning Commission Public Hearing stage. Once the Planning Commission has discussed and implemented it's input, the Plan will be forwarded to the Commissioners where a new Public Hearing process will start.

Staff attended the Housing Symposium hosted at St. Mary's College. This event included over 120 attendees from community stakeholders, academia, intuitional, County Government, realtors.

The Governor has created an Economic Competitiveness Sub Cabinet. In June, St. Mary's County was invited to share recommendations of how Maryland can become even more competitive and how our County can help Maryland become stronger. Highlights

included our ecosystem and assets, there is no reason we can not become the State's Hub for autonomy (Lighthouse Sector designation).

DED has process two Property Tax Incentive Agreements in the past months. Platform Aerospace is expanding into an additional 80,000 sqft. space adding about 200 jobs. MAXXPR plans to add 30-35 jobs to a renovated fast food restaurant that was sitting vacant.

Kellie Hinkle updated the EDC about participation in the SelectUSA Investment Summit, partnering with the Maryland Department of Commerce and other Maryland jurisdictions to participate in the highest profile event in the United States to facilitate business investment by connecting investors, companies, economic development organizations, and industry experts.

Ms. Greb announced the following Memorandum of Understandings (MOUs) were renewed to continue partnerships with the Small Business Development Center and Visit St. Mary's. St. Mary's County also renewed it's Partnership Intermediary Agreement with Naval Air Warfare Center Aircraft Division (NAWCAD) for 10 years.

105,000 attendees for the Air Show held at Patuxent River Naval Air Station.

Ms. Hinkle shared that the NHRA Nationals were held at Maryland International Raceway in Budds Creek. DED partnered with Visit St. Mary's to host a driver meet and greet event at the Barns at New Market which was well attended.

Ms. Greb shared that the Foreign Liaison Officer Program is doing well, organically growing stronger.

Ms. Hinkle announced the redesignation of the existing Opportunity Zones Program. DED is seeking nominations to present to the Governor for tax incentives to bushiness who are investing Capital Gains into opportunity funds in designated areas, St. Mary's County has 4 eligible areas through census tracks. Currently, DED is recommending 2 of those census tracks to move forward to the Governor.

Ms. Greb updated the EDC that the Navy will be releasing the updated ACUIZ and Noise Contours Study soon, which will include additional buffers. An Open House will be hosted at the Frank Knox Building on August 4th from 430 - 630, a RealID will be required to attend.

C. Sector Updates

No updates.

D. Next EDC Meeting will be on October 21, 2026 in person in the Commissioners Meeting Room, Chesapeake Building, 41770 Baldridge Street, Leonardtown, MD 20650 (video & audio)

6. ADJOURN

I move to adjourn the July 15, 2026 Economic Development Commission Meeting.

Moved by: Curtis Brown; seconded by: Dr Dale Moore

Motion Carries

THE ST. MARY'S 2030 PROSPERITY STRATEGY

A Civic Strategy for Strengthening the Community That Supports NAS Patuxent River

Prepared for

The St. Mary's County Economic Development Commission, Planning Commission, Commissioners and the People of St. Mary's County

"The purpose of intentional growth is not to make St. Mary's County bigger.

It is to make St. Mary's County stronger."

Editorial Draft



Dedicated to the Next Generation

Every generation inherits more than a place.

It inherits a responsibility.

The responsibility to preserve what is worth protecting.

To strengthen what can be improved.

And to prepare opportunities for those who will one day call this community home.

May the ideas contained within this strategy contribute, in some small way, to a St. Mary's County that continues to support those who defend our Nation, honor those who built our past, and inspire those who will shape our future.

The St. Mary's Promise

A Preamble

St. Mary's County is unlike any other community in Maryland.

It is where Maryland's story began.

It is a place shaped by the Chesapeake Bay, the Patuxent River, generations of farmers and watermen, historic churches, small towns, military service, and families who have chosen to build their lives here.

It is also home to Naval Air Station Patuxent River—one of the Nation's premier centers for naval aviation research, engineering, testing, evaluation, and acquisition.

Few communities enjoy such a remarkable combination of innovation and tradition.

These strengths didn't happen by accident.

They are the product of generations of thoughtful stewardship.

Each generation has accepted the responsibility of protecting what makes St. Mary's County extraordinary while preparing it for those who would come next.

That same responsibility now belongs to us.

The decisions made during the coming decade will influence not only today's residents, but the families who will call St. Mary's County home for generations.

Those decisions deserve more than short-term thinking.

Editorial Draft

They deserve a shared vision rooted in stewardship, fiscal responsibility, and thoughtful planning.

This strategy begins with several enduring beliefs.

We believe the long-term success of Naval Air Station Patuxent River and the long-term prosperity of St. Mary's County are inseparable.

We believe thoughtful growth and rural preservation are complementary objectives—not competing priorities.

We believe every family should have the opportunity to live, work, and thrive in the community they serve.

We believe today's prosperity should become tomorrow's opportunity through intentional investment in education, infrastructure, workforce development, and future generations.

Above all, we believe leadership is measured not simply by the decisions it makes, but by the legacy those decisions leave behind.

From these convictions arise four enduring commitments.

Preserve Our Rural Heritage.

Invest in the Next Generation.

Support NAS Patuxent River.

Strengthen Our Workforce.

These commitments are more than guiding principles.

They represent a promise.

A promise that every decision should leave St. Mary's County stronger than we found it.

Our Purpose

This strategy was not written to advocate for growth.

Nor was it written to oppose growth.

It was written to advocate for thoughtful stewardship.

It recognizes that the Planning Commission and the County Commissioners are entrusted with balancing competing priorities that rarely present simple answers:

Editorial Draft

Housing.

Education.

Infrastructure.

Economic development.

Fiscal responsibility.

Environmental stewardship.

Transportation.

Quality of life.

Each deserves thoughtful consideration.

None exists independently.

Rather than prescribing a single course of action, this strategy offers a framework through which future decisions may be evaluated.

A framework grounded in objective analysis.

Consistent with the St. Mary's County Comprehensive Plan.

Supportive of Naval Air Station Patuxent River.

Protective of the County's rural heritage.

Respectful of differing viewpoints.

Focused upon one enduring objective:

Leaving St. Mary's County stronger than we found it.

Editorial Draft

Executive Summary

A Strategy for a Stronger St. Mary's County

Every generation is presented with defining opportunities.

For St. Mary's County, one of those opportunities is now before us.

Maryland has identified a projected housing need.

Naval Air Station Patuxent River continues to evolve as one of the Nation's most strategically important military installations.

The County's Comprehensive Plan already establishes a thoughtful vision for where future growth should occur while preserving the farms, forests, waterways, and rural landscapes that define St. Mary's County.

Viewed independently, each of these realities represents an important public policy discussion.

Viewed together, they represent an extraordinary opportunity.

This strategy begins with one simple belief.

The purpose of intentional growth is not to make St. Mary's County larger.

It is to make St. Mary's County stronger.

A stronger workforce.

Stronger schools.

Stronger fiscal capacity.

Stronger partnerships with NAS Patuxent River.

Stronger communities.

And greater opportunity for the next generation.

Throughout this strategy, housing is intentionally presented not as an end in itself, but as one component of a broader vision for strengthening the community that supports one of America's premier military installations.

Success will not ultimately be measured by the number of homes constructed.

It will be measured by whether future generations inherit a St. Mary's County that remains prosperous, beautiful, fiscally responsible, and uniquely its own.

Editorial Draft

The opportunities presented throughout this strategy are therefore offered not as mandates, but as invitations for thoughtful discussion.

They seek to build upon the County's existing Comprehensive Plan, strengthen its partnership with NAS Patuxent River, preserve its rural character, and prepare future generations for continued success.

The question before us is not simply whether St. Mary's County will change.

The question is whether we will intentionally shape that change in a manner that strengthens the community we hope to leave behind.

Editorial Draft

Executive Dashboard

The Opportunity Before Us

4,097

Additional Housing Units

Projected by the State of Maryland to meet anticipated housing needs through 2030.

10,000+

Future Residents

Supporting the workforce, families, schools, and businesses that strengthen the County.

Approximately $2.3 Billion

Illustrative Additional Taxable Assessment

Providing long-term fiscal capacity for future public investment.

Approximately $19 Million

Illustrative Annual Property Tax Revenue

Recurring annual revenue supporting County operations and public services.

Approximately $27 Million

Illustrative Residential Excise Tax Revenue

One-time revenue supporting future infrastructure and capital investment.

Editorial Draft

Four Enduring Commitments

Preserve Our Rural Heritage

Protect the landscapes, waterways, farms, forests, and historic communities that define St. Mary's County.

Invest in the Next Generation

Transform today's prosperity into tomorrow's opportunities through thoughtful investment in education, infrastructure, and community.

Support NAS Patuxent River

Strengthen the community that supports one of America's most important military installations.

Strengthen Our Workforce

Create opportunities for the people whose talents drive the County's economy.

"The best time to prepare the future is before it arrives."

Editorial Draft

BUILDING TODAY FOR A STRONGER TOMORROW

A CONNECTED APPROACH TO COMMUNITY PROSPERITY

St. Mary's County, Maryland



Editorial Draft

When we align planning, housing, jobs, investment and community well-being,
we create opportunity for today and security for tomorrow.

STRONGER COMMUNITIES
Safe, connected and welcoming for all.

SUSTAINABLE GROWTH
Balancing development with conservation for future generations.

ECONOMIC VITALITY
A robust economy with opportunities for residents and businesses.

BRIGHTER FUTURES
Quality education empowers students and strengthens our workforce.

LASTING PROSPERITY
Smart choices today lead to a stronger, more resilient County for generations to come.

Growing Together. Investing Today. Thriving Tomorrow.

THE ST. MARY'S 2030 PROSPERITY STRATEGY

Understanding Our Opportunity

Every community inherits opportunities.

Some are created by history.

Others are created by the choices we make today.

St. Mary's County stands at one of those moments.

Few communities possess the extraordinary combination of assets found here.

A nationally significant military installation.

A highly educated workforce.

Historic communities that tell the story of Maryland's earliest beginnings.

Working farms and waterfronts that continue to define the landscape.

A quality of life that attracts families, entrepreneurs, educators, public servants, and innovators alike.

These strengths have positioned St. Mary's County for continued success.

They also create an important responsibility.

The decisions made today regarding housing, education, infrastructure, workforce development, and land use will influence not only today's residents, but generations yet to come.

Fortunately, St. Mary's County is not beginning this conversation from scratch.

Maryland has identified future housing needs.

The County has already adopted a Comprehensive Plan that establishes where future growth should occur while preserving the rural character that residents value.

NAS Patuxent River continues to evolve as one of the Nation's premier centers for naval aviation research, engineering, testing, and acquisition.

Together, these realities present an extraordinary opportunity.

Not simply to accommodate future growth.

Editorial Draft

But to intentionally strengthen the community that supports one of America's most important military installations while preserving the character that makes St. Mary's County unlike anywhere else in Maryland.

The chapters that follow establish the foundation for every opportunity presented throughout this strategy.

Before discussing recommendations, it is first necessary to understand why this moment matters.

Editorial Draft

Protecting the Economic Foundation of St. Mary's County

Supporting the Community That Supports NAS Patuxent River

Chapter Overview

The economy of St. Mary's County is unlike that of almost any other county in Maryland.

Since April 1, 1943, Naval Air Station Patuxent River has grown to serve as the County's economic foundation, attracting one of the Nation's most highly educated workforces while supporting thousands of military personnel, civilian employees, engineers, scientists, acquisition professionals, contractors, educators, healthcare providers, entrepreneurs, and small businesses.

Understanding this relationship is essential to understanding every chapter that follows.

Housing, education, infrastructure, transportation, workforce development, and fiscal stewardship are not separate conversations.

They are interconnected components of a single question.

How can St. Mary's County continue strengthening the community that supports one of America's premier military installations?

Why NAS Patuxent River Matters

The story of modern St. Mary's County cannot be told without first understanding the remarkable role of Naval Air Station Patuxent River.

Established in 1943 during the Second World War, NAS Patuxent River has grown from a wartime testing facility into one of the world's foremost centers for naval aviation research, development, testing, evaluation, engineering, and acquisition.

Its mission is critical to the readiness of the United States Navy and Marine Corps.

Its influence upon St. Mary's County has been equally profound.

Today, the installation supports one of the most highly educated concentrations of engineers, scientists, acquisition professionals, and technical specialists anywhere in the Nation.

Thousands of military personnel, civilian employees, and defense contractors contribute daily to programs that shape the future of naval aviation.

Editorial Draft

The installation's impact extends well beyond the security fence surrounding the base.

Its presence supports local businesses.

It strengthens the regional economy.

It creates opportunities for educators, healthcare providers, skilled trades, entrepreneurs, and countless service industries.

Simply stated, NAS Patuxent River is not merely located in St. Mary's County.

It is one of the principal reasons the modern economy of St. Mary's County exists.

More Than an Employer

Economic impact is often measured through jobs, payroll, and tax revenues.

While those measures are important, they tell only part of the story.

NAS Patuxent River has helped cultivate something even more valuable.

A community defined by innovation.

The installation has attracted generations of professionals whose expertise extends beyond engineering and defense acquisition.

These individuals have become business owners.

Teachers.

Volunteer firefighters.

Youth coaches.

Church leaders.

Nonprofit volunteers.

Parents.

Neighbors.

The relationship between NAS Patuxent River and St. Mary's County therefore extends far beyond economics.

Together, they have created a community where public service, technical excellence, and civic engagement reinforce one another.

This partnership represents one of the County's greatest competitive advantages.

Editorial Draft

It deserves continued investment.

The Community That Supports the Mission

Military installations do not operate independently of the communities that surround them.

Their long-term success depends upon the ability to attract, retain, and support talented people.

Engineers evaluating career opportunities also evaluate communities.

Military families consider school systems, neighborhoods, healthcare, recreation, and quality of life.

Engineers and acquisition professionals seek places where they can build careers while raising families and investing in their communities.

These decisions influence more than individual households.

Collectively, they shape the long-term competitiveness of the installation itself.

A community capable of attracting exceptional people strengthens the mission it supports.

For this reason, investments in housing, education, transportation, public safety, healthcare, and recreation should not be viewed independently.

Together, they create the environment necessary for talented people to choose St. Mary's County not simply as a place to work, but as a place to build their lives.

Looking Ahead

Supporting the community that supports NAS Patuxent River requires more than appreciation for its past.

It requires preparation for its future.

The following chapter explores Maryland's projected housing needs and explains why thoughtful housing should be understood not as an objective unto itself, but as one element of a broader workforce strategy designed to strengthen the County for generations to come.

Editorial Draft

THE ST. MARY'S 2030 PROSPERITY STRATEGY

Meeting Maryland's Housing Need

Understanding the Opportunity Before Us

Chapter Overview

Maryland has identified a projected need for approximately **4,097 additional housing units** in St. Mary's County by 2030.

Few numbers have generated more discussion.

Few have also generated more misunderstanding.

This figure is often interpreted as a mandate for rapid development or an expectation that every available parcel of land should be built upon.

It is neither.

Rather, it represents an estimate of future housing demand based upon projected household formation and anticipated economic conditions.

Understanding what this projection means—and what it does not mean—is essential to having a productive conversation about the County's future.

This chapter explores the State's housing analysis, examines common misconceptions, and explains why thoughtful planning gives St. Mary's County the opportunity to shape growth rather than simply react to it.

Editorial Draft

Understanding Maryland's Housing Projection

Maryland's housing needs assessment was developed to help counties evaluate anticipated housing demand over the coming decade.

It is not a directive requiring local governments to approve a specific number of residential units.

Nor does it dictate where housing should occur.

Instead, it provides local leaders with a planning benchmark—a starting point for evaluating how future housing needs may influence economic development, workforce availability, infrastructure, and community planning.

For St. Mary's County, the projected need for approximately 4,097 additional housing units reflects several long-term trends.

An evolving workforce.

Changing household sizes.

Population growth.

Housing replacement.

Economic opportunity.

Taken together, these factors suggest that additional housing will likely be necessary if the County wishes to remain competitive in attracting and retaining the workforce that supports NAS Patuxent River and the broader regional economy.

The projection is therefore best understood not as a construction target, but as an opportunity to prepare thoughtfully for the future.

Sidebar

Myth vs. Reality

Myth

The State has ordered St. Mary's County to build 4,097 homes.

Reality

The State has identified a projected housing need to assist counties with long-range planning. Local land use decisions remain the responsibility of local government through established planning and public participation processes.

Myth

Meeting future housing demand requires developing rural farmland.

Reality

The County's Comprehensive Plan already identifies Development Districts intended to accommodate future growth while preserving agricultural land and rural landscapes.

Myth

Housing growth and rural preservation are competing priorities.

Editorial Draft

Reality

Thoughtful implementation of the Comprehensive Plan allows both objectives to advance together.

Editorial Draft

Members-only attachment

Planning Rather Than Reacting

Communities generally experience one of two futures.

They either prepare for growth before it occurs.

Or they react after growth has already begun.

Preparation allows infrastructure to be planned.

Schools to be anticipated.

Transportation improvements to be coordinated.

Utilities to be expanded efficiently.

Development to occur where it has been intentionally envisioned.

Reaction rarely offers those same advantages.

When communities fail to prepare, growth often occurs in ways that create unnecessary pressure upon infrastructure, schools, and public services.

Thoughtful planning provides the opportunity to shape outcomes before they become challenges.

That opportunity already exists in St. Mary's County.

Figure 2.1

Two Approaches to Growth



Editorial Draft

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Why Housing Matters

Throughout this strategy, housing has intentionally been presented as something larger than residential construction.

Housing supports workforce recruitment.

Housing influences affordability.

Housing affects commute patterns.

Housing strengthens neighborhoods.

Housing contributes to the County's fiscal capacity.

Most importantly, housing creates opportunities for people to become part of the community.

When viewed through that broader lens, housing becomes one component of a comprehensive workforce strategy.

The objective is therefore not simply to increase housing production.

The objective is to strengthen the community that supports one of America's premier military installations while preserving the qualities that make St. Mary's County unique.

Housing and Workforce Competitiveness

Highly skilled professionals increasingly possess choices regarding where they live.

Communities that provide diverse housing opportunities, excellent schools, quality healthcare, recreational amenities, and a strong sense of place are often better positioned to attract and retain talented individuals.

This is particularly important in regions supporting highly specialized industries such as aerospace, engineering, defense acquisition, cybersecurity, and advanced research.

The workforce supporting NAS Patuxent River represents one of the County's greatest assets.

Ensuring that future generations of engineers, scientists, military personnel, healthcare professionals, educators, entrepreneurs, and skilled tradespeople have opportunities to establish roots within St. Mary's County strengthens both the community and the installation.

Housing is one component of that equation.

Not the destination.

A means toward a stronger future.

Editorial Draft

Figure 2.2

Housing Supports More Than Housing



Editorial Draft

Looking Ahead

Understanding future housing demand is only one part of the conversation.

Equally important is understanding where future growth should occur.

Fortunately, St. Mary's County has spent decades developing a thoughtful vision for that future.

The next chapter examines how the County's Comprehensive Plan already provides the framework for accommodating future housing needs while preserving the farms, forests, waterways, historic communities, and rural character that define St. Mary's County.

THE ST. MARY'S 2030 PROSPERITY STRATEGY

The Comprehensive Plan Already Provides the Framework

Building Upon a Shared Vision

Chapter Overview

Communities often spend years developing comprehensive plans.

Citizens participate in public meetings.

Planning professionals conduct research.

Elected officials weigh competing priorities.

After extensive discussion, a shared vision emerges.

St. Mary's County has already completed that work.

The Comprehensive Plan represents decades of thoughtful planning and public engagement. It establishes where growth should occur, where rural landscapes should be preserved, and how future development should be supported by infrastructure, transportation, and public investment.

This chapter begins with a simple observation.

The challenge before St. Mary's County is not to create a new vision.

It is to faithfully implement the vision that already exists.

Planning Is One of the County's Greatest Strengths

Long-term prosperity rarely occurs by accident.

It is almost always the result of consistent planning, disciplined leadership, and a willingness to think beyond immediate needs.

The St. Mary's County Comprehensive Plan reflects those principles.

Rather than encouraging unmanaged expansion, the Plan recognizes that communities function best when housing, employment, transportation, schools, utilities, recreation, and environmental stewardship are considered together.

That philosophy appears throughout the document.

Editorial Draft

Growth should occur intentionally.

Infrastructure should support development.

Agricultural land and natural resources should remain protected.

Communities should retain the qualities that make them distinctive.

These principles are not new.

They have guided County planning for years.

This strategy simply affirms them.

Development Districts: Growth by Design

One of the Comprehensive Plan's greatest strengths is its recognition that not every part of St. Mary's County should experience the same type of development.

Instead, the County has identified Development Districts intended to accommodate future housing, employment, commercial activity, and supporting infrastructure.

This approach accomplishes two important objectives simultaneously.

First, it directs growth toward locations where public investment can be provided more efficiently.

Roads.

Utilities.

Schools.

Public safety.

Parks.

Transportation.

Second, it protects the farms, forests, waterways, rural roads, and historic communities that define much of St. Mary's County's identity.

Growth and preservation are therefore not competing philosophies.

When implemented thoughtfully, they become complementary outcomes.

Every home built within an appropriate Development District reduces pressure to expand into areas intended to remain rural.

Editorial Draft

In this way, well-planned growth becomes one of the County's most effective preservation strategies.

Figure 3.1

The County Already Has the Blueprint



Editorial Draft

Sidebar

Preservation Through Planning

Thoughtful planning asks a different question than “Where can we build?”

Instead, it asks:

“Where should we build so that we preserve everything else?”

The Comprehensive Plan already provides that answer.

The Value of Predictability

Communities benefit when residents, businesses, property owners, and developers understand the long-term vision for growth.

Predictability creates confidence.

Residents understand how their communities may evolve.

Businesses make investment decisions with greater certainty.

Public infrastructure can be planned efficiently.

Developers better understand community expectations before submitting proposals.

Perhaps most importantly, local government maintains the ability to evaluate each proposal within a consistent planning framework rather than making isolated decisions one project at a time.

Predictability does not eliminate public discussion.

Nor does it guarantee approval of any individual proposal.

Rather, it establishes a shared framework through which each proposal can be thoughtfully evaluated.

That consistency strengthens public confidence in the planning process itself.

Preservation Is an Active Choice

The preservation of rural character is often described as preventing change.

The Comprehensive Plan offers a more constructive perspective.

Editorial Draft

Preservation is achieved through intentional choices.

Choosing where growth should occur.

Choosing where agriculture should remain.

Choosing to protect forests and waterways.

Choosing to invest in existing communities.

Choosing to strengthen town centers.

Choosing to preserve scenic roads and historic landscapes.

Every one of these decisions contributes to the County's identity.

The goal is therefore not to stop change.

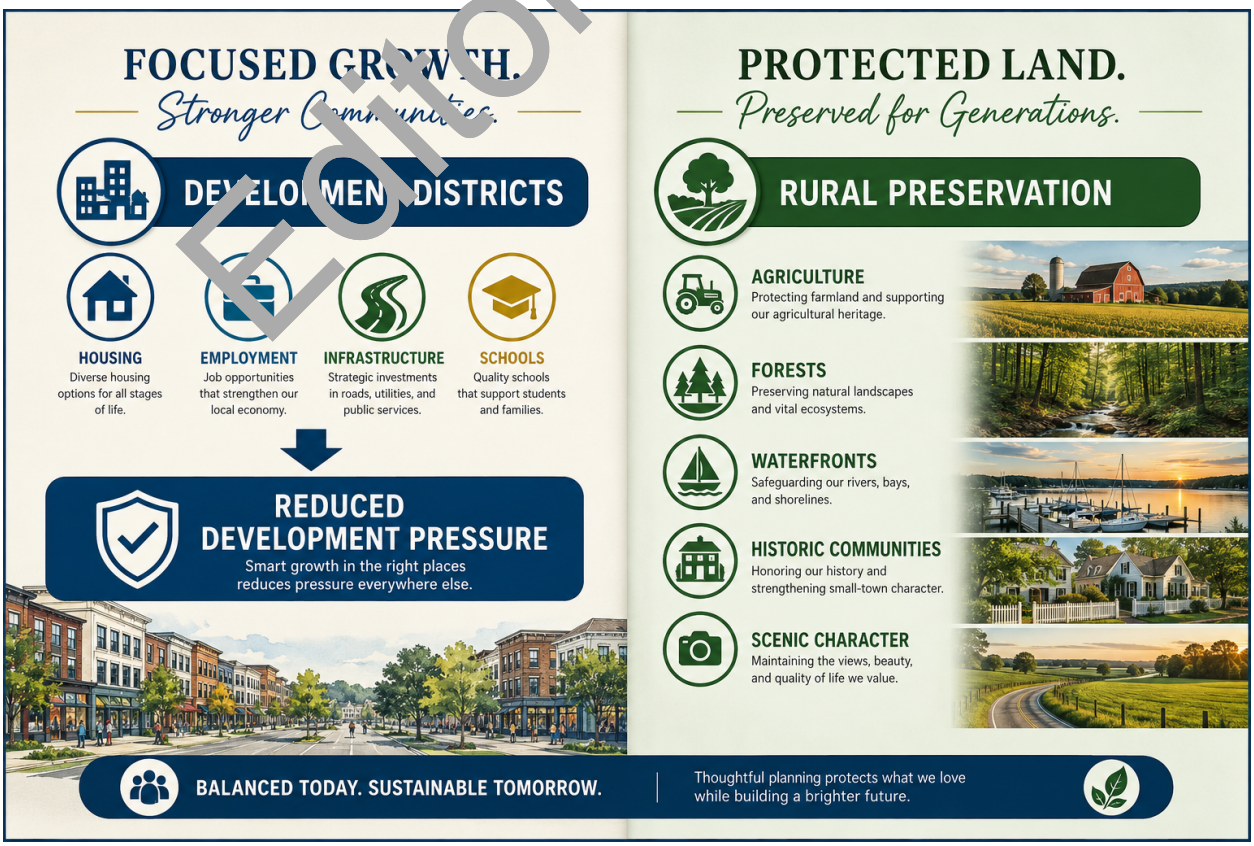
It is to guide change thoughtfully.

Communities that intentionally direct growth are often better positioned to preserve the places residents value most.

Editorial Draft

Figure 3.2

Growth and Preservation Work Together



Confidence in the Process

One of the themes woven throughout this strategy is confidence.

Confidence in the people of St. Mary's County.

Confidence in its institutions.

Confidence in its long-term planning.

Confidence in the Comprehensive Plan.

The County does not face a choice between preserving its rural heritage and preparing for future generations.

Its adopted planning framework already demonstrates how both objectives can be pursued together.

That is perhaps one of the most encouraging findings contained within this strategy.

The blueprint already exists.

The opportunity before today's leaders is to continue implementing it with consistency, transparency, and thoughtful stewardship.

Looking Ahead

Understanding where future growth should occur naturally leads to another question.

Why does it matter?

The following chapter explores the relationship between housing, workforce competitiveness, and the long-term success of Naval Air Station Patuxent River.

It argues that supporting the community surrounding the installation is not simply good planning.

It is one of the County's most important economic development strategies.

Editorial Draft

PART II

Strengthening the Community That Supports NAS Patuxent River

Communities are not strengthened simply by what they build.

They are strengthened by the people they inspire to build a life there.

St. Mary's County has always been defined by the character of its people.

Generations of military families, educators, farmers, watermen, entrepreneurs, engineers, healthcare professionals, and public servants have created a community whose strength extends well beyond economic statistics.

As the County prepares for the future, its greatest opportunity is not simply to accommodate growth.

It is to create a community where talented people choose to remain.

A place where military families put down roots.

Where young professionals purchase their first homes.

Where children receive an exceptional education.

Where retirees remain engaged.

Where neighbors become volunteers, coaches, mentors, and civic leaders.

The following chapters explore how thoughtful investment in people ultimately strengthens every institution that makes St. Mary's County extraordinary.

Editorial Draft

THE ST. MARY'S 2030 PROSPERITY STRATEGY

Supporting the Workforce That Supports NAS Patuxent River

Housing as Workforce Infrastructure

Chapter Overview

Throughout its history, Naval Air Station Patuxent River has adapted to meet the evolving needs of the United States Navy.

Aircraft have changed.

Technology has advanced.

Mission requirements have evolved.

One constant has remained.

Success has always depended upon exceptional people.

Engineers.

Scientists.

Military personnel.

Acquisition professionals.

Cybersecurity specialists.

Healthcare providers.

Educators.

Entrepreneurs.

Skilled trades.

Every mission begins with people.

Communities that successfully attract, support, and retain talented people strengthen not only their own economies, but the institutions those people serve.

Editorial Draft

This chapter explores why housing should be viewed as an essential component of workforce infrastructure and why strengthening the community surrounding NAS Patuxent River represents one of the County's most important long-term investments.

Infrastructure Is More Than Roads

When most people hear the word *infrastructure*, they think of roads, bridges, utilities, airports, and public buildings.

Those investments remain essential.

They always will.

Yet communities competing for highly educated professionals increasingly recognize another form of infrastructure.

The community itself.

The neighborhoods where families live.

The schools children attend.

The parks where they gather.

The restaurants they frequent.

The trails they explore.

The churches they attend.

The small businesses they support.

These community assets influence whether talented people choose not simply to accept employment—but to establish roots.

Infrastructure, therefore, should be understood not only as physical assets, but as the environment that enables people to thrive.

Editorial Draft

Sidebar

Rethinking Infrastructure

Traditional Infrastructure

- Roads
- Bridges
- Utilities
- Public Buildings

Community Infrastructure

- Housing
- Schools
- Parks
- Healthcare
- Public Safety
- Recreation
- Neighborhoods

Together, these investments create communities where people choose to build their lives.

Editorial Draft

The Workforce Behind the Mission

Every successful flight test.

Every engineering breakthrough.

Every acquisition milestone.

Every advancement in naval aviation begins with people whose expertise has been developed over years—often decades.

Those individuals are among the Nation's most valuable professional resources.

Their decisions about where to live increasingly consider more than employment opportunities.

They evaluate quality of life.

Educational opportunities for their children.

Housing availability.

Commute times.

Healthcare.

Outdoor recreation.

Community character.

The ability to become part of something larger than their careers.

Communities that recognize these priorities position themselves to compete successfully for exceptional talent.

Communities that overlook them risk becoming places where people work – but choose not to live.

A Community Worth Choosing

This strategy has consistently emphasized that the objective is not simply to attract workers.

It is to attract neighbors.

People who coach youth sports.

Volunteer in local schools.

Support nonprofit organizations.

Serve in civic clubs.

Mentor students.

Open businesses.

Raise families.

Strengthen neighborhoods.

These contributions rarely appear in economic impact studies.

Yet they are among the most valuable investments a community can receive.

The true measure of success is therefore not how many people commute into St. Mary's County each morning.

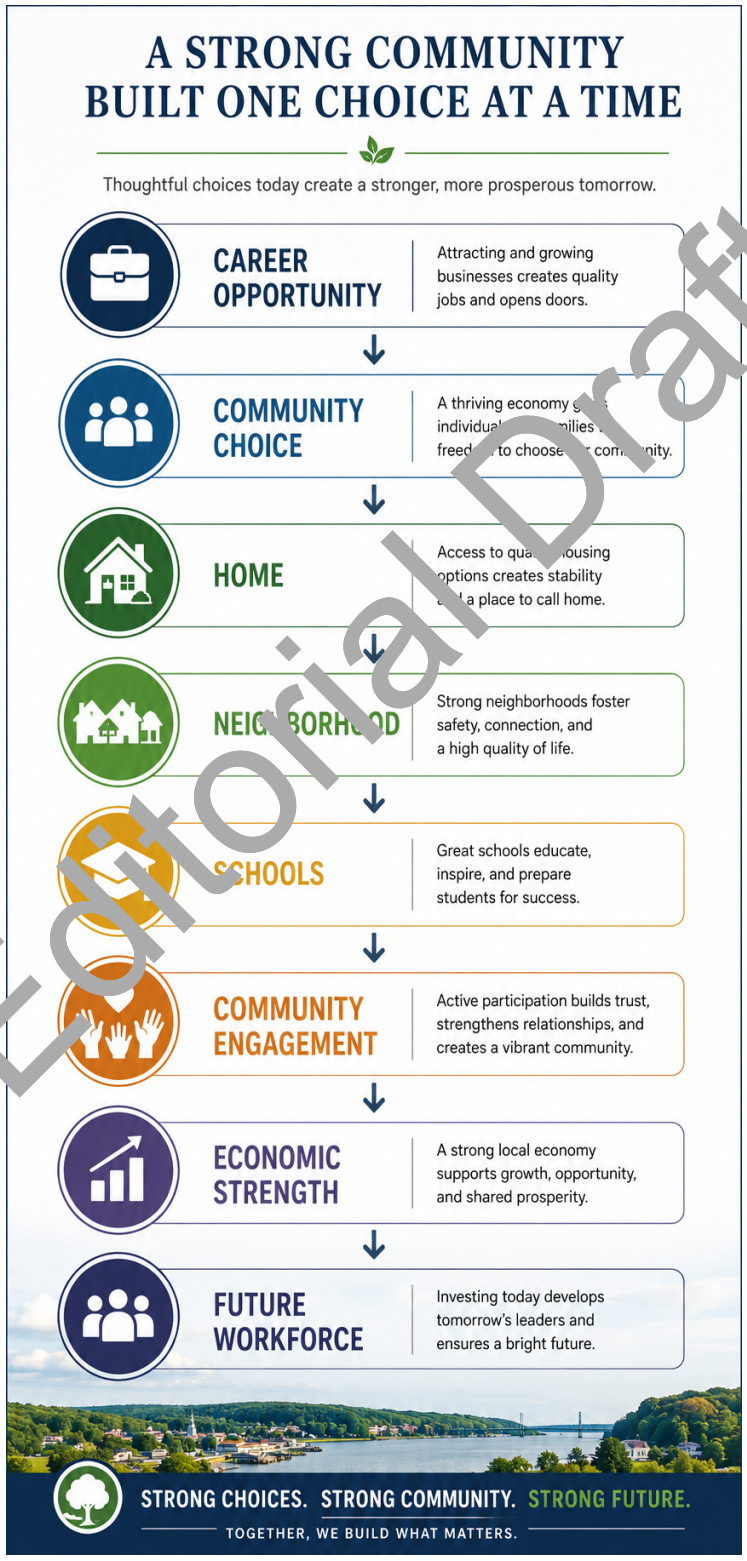
It is how many choose to remain when the workday is over.

Editorial Draft

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Figure 4.1

The Workforce Cycle



Editorial Draft

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Preparing for Tomorrow

The relationship between NAS Patuxent River and St. Mary's County has always evolved.

As technology advances and workforce needs continue changing, the surrounding community must also continue evolving.

This does not require abandoning the County's rural heritage.

Nor does it require sacrificing the qualities that make St. Mary's County unique.

It requires thoughtful investment.

Investment in schools and education.

Investment in neighborhoods.

Investment in transportation.

Investment in quality of life.

Investment in opportunities that encourage talented individuals and families to remain part of the community long after accepting a position at NAS Patuxent River.

These investments strengthen both the County and the installation.

They also prepare St. Mary's County for opportunities that cannot yet be predicted.

The Next BRAC Begins Today

Discussions regarding Base Realignment and Closure often focus upon future commissions and federal decisions.

This strategy intentionally takes a different perspective.

The next BRAC begins long before any federal commission convenes.

It begins with the choices communities make every year.

Communities that invest in education strengthen their workforce.

Communities that strengthen their workforce become more competitive.

Communities that remain competitive create environments where innovation continues to flourish.

None of these actions guarantee future missions.

Nor should they.

Editorial Draft

They do, however, reinforce a simple truth.

Communities that continually invest in themselves are best positioned to support institutions that continue investing in them.

This chapter is therefore not about predicting future federal actions.

It is about embracing local stewardship.

The future competitiveness of NAS Patuxent River is strengthened when St. Mary's County remains one of America's premier places to live, work, and raise a family.

Looking Ahead

Supporting today's workforce is only part of the responsibility entrusted to community leaders.

An equally important responsibility is preparing tomorrow's workforce.

The next chapter explores how today's prosperity can become tomorrow's opportunity through intentional investment in education, STEM initiatives, and future generations.

Editorial Draft

Investing in the Next Generation

Transforming Today's Prosperity into Tomorrow's Opportunity

The greatest measure of stewardship is not what we inherit.

It is what we choose to leave behind.

St. Mary's County has long benefited from the extraordinary talents of the men and women who support Naval Air Station Patuxent River.

One of the greatest opportunities before today's leaders is to ensure that future generations are equally prepared to lead, innovate, and serve.

Preparing tomorrow's workforce begins long before a student submits a résumé.

It begins in classrooms.

In science laboratories.

On athletic fields.

In technical education programs.

In apprenticeships.

And in communities that believe every child deserves the opportunity to succeed.

The following chapter explores how intentional investment in education can transform today's prosperity into a lasting legacy for future generations.

Editorial Draft

THE ST. MARY'S 2030 PROSPERITY STRATEGY

Investing in the Next Generation

Transforming Today's Prosperity into Tomorrow's Opportunity

Chapter Overview

Successful communities measure prosperity differently.

They understand that true prosperity is not defined solely by economic growth, expanding tax bases, or rising property values.

It is measured by the opportunities created for future generations.

Every generation inherits the responsibility of preparing those that follow.

Sometimes that responsibility means constructing roads.

Sometimes it means preserving farmland.

Sometimes it means strengthening schools.

Always, it means thinking beyond the next budget cycle.

This chapter introduces one of the central ideas within this strategy:

The Next Generation Fund

Not as a specific financial mechanism.

But as a philosophy of stewardship.

A commitment that a portion of tomorrow's prosperity should be intentionally invested in tomorrow's people.

Editorial Draft

Prosperity Is a Responsibility

Periods of economic strength present communities with an extraordinary opportunity.

Additional revenue can simply be absorbed into annual operating budgets.

Or it can become the foundation for investments that transform a community for generations.

Throughout history, communities remembered for exceptional leadership have consistently chosen the latter.

They viewed prosperity not as something to consume, but as something to steward.

That philosophy has shaped universities.

Libraries.

Public parks.

Historic preservation.

Transportation systems.

And public schools that continue serving generations long after their original construction.

St. Mary's County now possesses a similar opportunity.

Thoughtful implementation of the Comprehensive Plan, combined with long-term economic growth, creates the potential to strengthen public investment without sacrificing fiscal responsibility.

The question is not whether additional revenue should be generated.

The question is what legacy that revenue should create.

Editorial Draft

Sidebar

Stewardship

Stewardship asks a different question.

Instead of asking:

“How should today’s revenue be spent?”

It asks:

“What opportunities should today’s prosperity create for tomorrow?”

That single change in perspective has the power to reshape long-term decision making.

Introducing the Next Generation Fund

Throughout this strategy, several opportunities have emerged.

Future schools.

Transportation improvements.

Public safety.

STEM education.

Career and technical education.

Parks and recreation.

Broadband infrastructure.

These investments share one characteristic.

They create value for decades.

The Next Generation Fund is built upon a simple principle.

When thoughtful growth expands the County’s long-term fiscal capacity, a portion of that new capacity should be intentionally reserved for transformational investments that benefit future generations.

The concept is deliberately flexible.

It does not prescribe a funding formula.

It does not dictate future budgets.

Editorial Draft

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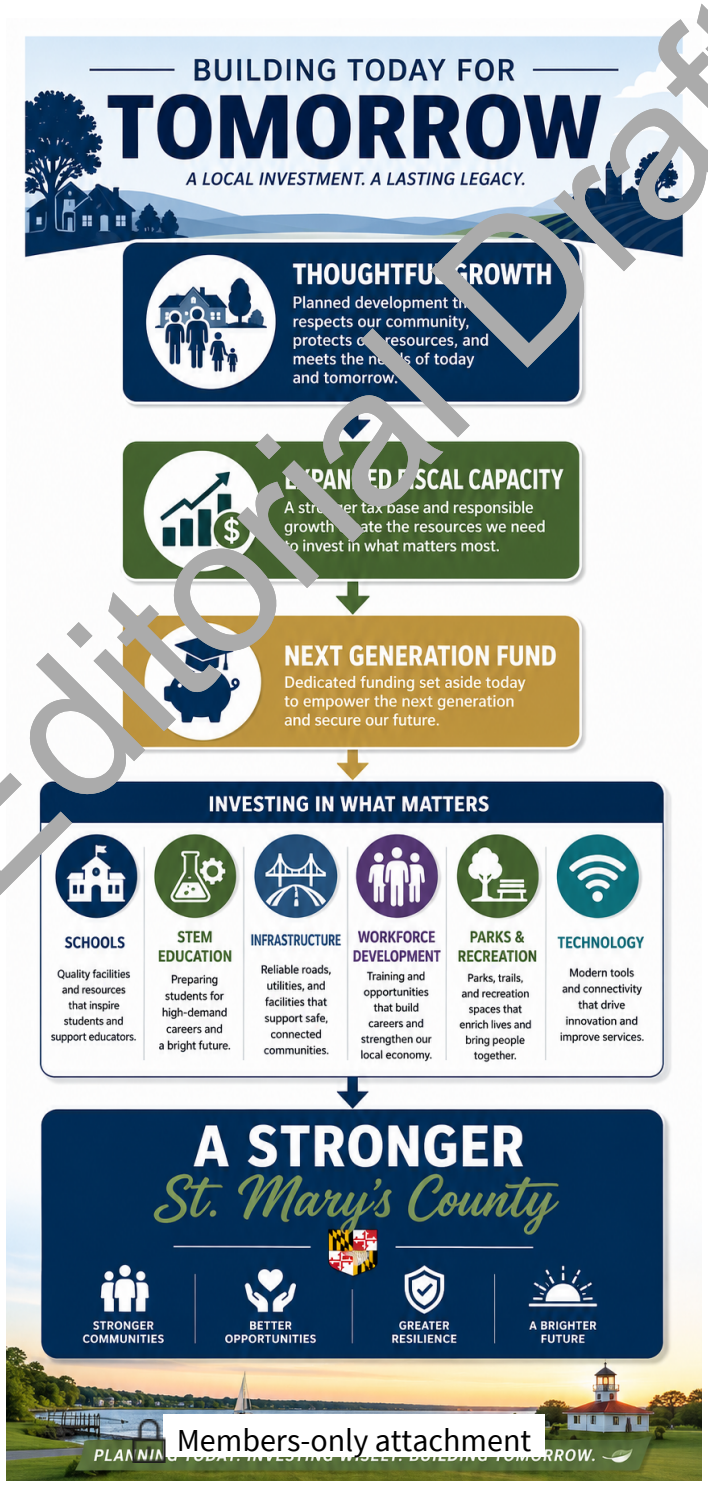
It does not limit the authority of future County Commissioners.

Rather, it establishes a philosophy.

Prosperity should create lasting opportunity.

Figure 5.1

The Next Generation Fund



Editorial Draft

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A Future High School

Perhaps no investment better illustrates this philosophy than the construction of a future comprehensive high school.

Schools represent more than buildings.

They are long-term investments in people.

They prepare future engineers.

Future teachers.

Future entrepreneurs.

Future military officers.

Future healthcare professionals.

Future public servants.

The additional fiscal capacity created through intentional growth presents an opportunity to begin preparing for those future investments long before construction becomes an immediate necessity.

Rather than viewing future school construction as a financial challenge, **the County can begin viewing it as a long-term objective supported through disciplined planning and responsible stewardship.**

Communities that prepare early often preserve greater flexibility later.

Preparing Tomorrow's Workforce

Few communities in America possess the educational opportunity available to St. Mary's County.

The County is home to one of the Nation's premier centers for aerospace engineering, defense acquisition, and advanced research.

The opportunity before local leaders is to strengthen the educational pipeline connecting today's classrooms with tomorrow's careers.

Strategic investment in science, technology, engineering, and mathematics education can help prepare local students for careers that already exist within their own community.

Partnerships with St. Mary's County Public Schools, the College of Southern Maryland, The Patuxent Partnership, local employers, and NAS Patuxent River can strengthen that pipeline even further.

Editorial Draft

The objective is not simply workforce development.

It is opportunity.

Opportunity for young people to build meaningful careers without leaving the community they call home.

Sidebar

Imagine 2035

Imagine a student entering kindergarten this year.

By the time that student graduates from high school, today's planning decisions will have become tomorrow's reality.

The question before today's leaders is simple:

What kind of St. Mary's County do we hope that student inherits?

Beyond Education

Although education sits at the heart of the Next Generation Fund, its vision extends further.

Communities thrive when investments reinforce one another.

Schools strengthen neighborhoods.

Parks improve quality of life.

Transportation supports economic development.

Broadband expands opportunity.

Public safety strengthens confidence.

Together, these investments create places where families choose not only to arrive—but to remain.

That is the ultimate objective.

A Legacy Worth Leaving

The most successful public investments are often appreciated long after the leaders who authorized them have completed their service.

Editorial Draft

Future generations rarely remember individual appropriations.

They remember the schools they attended.

The parks where they played.

The roads that connected communities.

The libraries where they learned.

The opportunities they inherited.

The Next Generation Fund embraces that philosophy.

It asks today's leaders to think not only about balancing next year's budget, but about preparing the next generation for success.

That is stewardship in its highest form.

Looking Ahead

Communities create prosperity through thoughtful planning.

The next chapter examines how that prosperity can translate into measurable fiscal capacity, demonstrating how intentional housing can strengthen County finances while expanding opportunities for schools, infrastructure, and future public investment.

Editorial Draft

THE ST. MARY'S 2030 PROSPERITY STRATEGY

PART III

Capturing the Prosperity Dividend

The Prosperity Dividend

Understanding the Fiscal Opportunity

Chapter Overview

Discussions regarding residential growth often begin with an understandable question.

What will it cost?

Schools.

Roads.

Public safety.

Infrastructure.

Those questions deserve thoughtful consideration.

Responsible communities should always evaluate the public investments necessary to support future growth.

Equally important, however, is another question.

What opportunities become possible when thoughtful planning expands a community's long-term fiscal capacity?

This chapter examines that question.

It explores how intentional growth can strengthen County finances while creating opportunities to invest in schools, infrastructure, public safety, parks, workforce development, and future generations.

The objective is not to suggest that growth is without cost.

Editorial Draft

Rather, it is to demonstrate that thoughtful growth also creates long-term value.

Looking Beyond Costs

Every investment carries both costs and benefits.

Communities routinely invest in roads because they create economic opportunity.

They invest in schools because they prepare future generations.

They invest in public safety because thriving communities require safe neighborhoods.

Housing should be evaluated through the same balanced lens.

New residential development requires public investment.

At the same time, it expands the tax base that supports those investments over future decades.

The conversation therefore should not ask only,

“What will growth cost?”

It should also ask,

“What lasting opportunities will thoughtful growth create?”

That broader perspective transforms the discussion from one focused solely upon expense to one centered upon stewardship.

Understanding the Prosperity Dividend

Throughout this strategy, the term **Prosperity Dividend** has been used intentionally.

It describes the long-term community benefits created when thoughtful growth strengthens a county’s fiscal capacity.

Unlike one-time economic gains, the Prosperity Dividend continues producing value year after year.

Every new resident contributes in multiple ways.

Property ownership expands the tax base.

Employment supports local income tax revenue.

Families support local businesses.

Consumer spending strengthens entrepreneurs.

Editorial Draft

Volunteerism strengthens neighborhoods.

Community engagement enriches civic life.

Each contribution reinforces the next.

Prosperity therefore becomes cumulative.

Over time, communities become stronger not because of any single development, but because of thousands of individual decisions made by families choosing to invest in the place they call home.

Illustrative Fiscal Capacity

The following planning scenario demonstrates the approximate magnitude of long-term fiscal opportunity associated with approximately **4,097 additional housing units.**

The purpose of this illustration is not to predict future revenues.

It is to demonstrate how recurring revenue accumulates over time and expands the County's ability to invest in future priorities.

Table 6.1

Illustrative Long-Term Fiscal Capacity

Revenue Source	Illustrative Impact
Additional Taxable Assessment	Approximately $2.3 Billion
Annual Property Tax Revenue	Approximately $19 Million
Residential Excise Tax Revenue	Approximately $27 Million
Recordation & Transfer Taxes	Significant One-Time Revenue
Building Permit Revenue	Significant One-Time Revenue
Local Income Tax Growth	Recurring Annual Revenue
Consumer Spending	Continuing Economic Activity

Illustrative planning scenario. Final publication will incorporate verified County financial data.

Editorial Draft

More Than Revenue

Financial capacity is meaningful only because of what it makes possible.

Expanded fiscal capacity creates opportunities to:

Construct future schools.

Improve transportation infrastructure.

Strengthen public safety.

Expand parks and recreational facilities.

Invest in broadband and technology.

Support workforce development.

Enhance public services.

These investments improve quality of life for existing residents while preparing the County for future generations.

The Prosperity Dividend should therefore be understood not simply as additional revenue, but as expanded opportunity.

Sidebar

A Different Way to Measure Success

Success should not be measured by the number of homes constructed.

Success should be measured by the opportunities those homes make possible.

The Return on Stewardship

Every generation makes investments whose greatest benefits are realized decades later.

Previous generations invested in roads that continue serving today's residents.

Schools that educated today's workforce.

Parks enjoyed by today's families.

Public buildings that remain at the center of civic life.

Today's leaders possess the same opportunity.

Editorial Draft

Thoughtful planning creates fiscal capacity.

Fiscal capacity creates opportunity.

Opportunity becomes legacy.

That is the Prosperity Dividend.

Looking Ahead

Financial strength tells only part of the story.

Communities are ultimately defined by people rather than budgets.

The next chapter explores the extraordinary value created when talented professionals choose not simply to work in St. Mary's County, but to build their lives, raise their families, and invest their futures here.

The Community Dividend

The Value of a Resident

The greatest contribution a resident makes cannot be measured on a balance sheet.

St. Mary's County has never been defined solely by its economy.

It has always been defined by its people.

The following chapter explores why attracting and retaining residents creates value that extends far beyond tax revenue and why the true return on thoughtful growth is ultimately measured in stronger neighborhoods, stronger schools, stronger volunteer organizations, and stronger communities.

Editorial Draft

THE ST. MARY'S 2030 PROSPERITY STRATEGY

The Community Dividend

The Value of a Resident

Chapter Overview

Economic development is often measured through numbers.

Jobs created.

Businesses recruited.

Tax revenue generated.

Square footage constructed.

Those measures are important.

They help communities evaluate economic performance.

Yet they tell only part of the story.

Communities are ultimately strengthened not by buildings, but by people.

Every new resident brings experience, talents, relationships, and aspirations that cannot be fully measured within a financial statement.

Some become business owners.

Some become teachers.

Some coach Little League.

Others mentor students, volunteer at churches, serve on nonprofit boards, or answer emergency calls in the middle of the night.

These contributions rarely appear in budget documents.

Yet they are among the most valuable assets any community possesses.

This chapter explores what this strategy defines as **the Community Dividend**—the immeasurable return created when talented people choose not simply to work in St. Mary's County, but to build their lives here.

Editorial Draft

Beyond the Commute

Every morning, a growing number of talented professionals cross county lines to support the mission of Naval Air Station Patuxent River.

Many arrive from neighboring jurisdictions.

They contribute their expertise to St. Mary's County.

Then, at the end of the day, they return home.

When they do, something important leaves with them.

Their property tax supports another county.

Their local income tax supports another county.

Much of their shopping, dining, charitable giving, and civic engagement occurs somewhere else.

Their evenings coaching youth sports.

Serving on nonprofit boards.

Volunteering in churches.

Mentoring young people.

Participating in civic organizations.

Those contributions enrich another community.

This observation should not be viewed as a criticism of neighboring counties.

Calvert County and Charles County are valued regional partners.

Rather, it highlights an opportunity.

Every family that chooses to live in St. Mary's County strengthens not only the local economy, but the social fabric of the community itself.

Editorial Draft

Figure 7.1

The Community Dividend



Editorial Draft

The Value of One Family

Imagine a young engineer accepting a position at NAS Patuxent River.

She and her spouse choose to purchase their first home in St. Mary's County.

Their children enroll in local schools.

On weekends, they volunteer with youth sports.

They support local restaurants.

Join a church.

Participate in community festivals.

Serve on the PTA.

Perhaps, years later, one of their children graduates from a St. Mary's County high school and begins a career at NAS Patuxent River, teaches in the local school system, or starts a business downtown.

That single decision—to build a life in St. Mary's County—creates value that extends across generations.

No economic model fully captures that return.

Yet every community benefits from it.

Sidebar

The Community Dividend

Some investments produce financial returns.

Others produce stronger communities.

The Community Dividend is measured not only in dollars, but in relationships, leadership, volunteerism, mentorship, and the countless acts of service that make a community feel like home.

Building Community

Throughout this strategy, housing has been discussed as one component of a broader vision.

By this point, it becomes possible to state that vision more clearly.

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The purpose of intentional growth is not simply to accommodate additional residents.

It is to strengthen community.

Communities are strengthened when neighbors know one another.

When children have mentors.

When civic organizations attract volunteers.

When schools benefit from engaged parents.

When small businesses thrive because residents choose to shop locally.

When people invest not only their income, but also their time.

These investments create a quality of life that cannot be replicated through public spending alone.

They arise naturally when people decide they belong.

Retaining the Next Generation

The Community Dividend extends beyond attracting new residents.

It also includes retaining those who already call St. Mary's County home.

Each year, talented students graduate from local schools.

Many pursue higher education.

Some return.

Others establish careers elsewhere.

Communities that create meaningful employment opportunities, attainable housing, excellent schools, and exceptional quality of life increase the likelihood that future generations will choose to return home.

Perhaps the greatest success would be hearing a graduate say:

"I could have lived anywhere.

I chose to build my future here."

That decision strengthens St. Mary's County in ways that extend far beyond economics.

Editorial Draft

A Community Worth Leaving Better

Every generation benefits from those who came before.

The parks enjoyed today exist because previous generations invested in them.

The schools educating today's students were built through long-term planning.

The neighborhoods people cherish were once someone's vision for the future.

Today's residents inherit that same responsibility.

The Community Dividend reminds us that the true measure of prosperity is not found in financial statements.

It is found in stronger neighborhoods.

Greater civic engagement.

Thriving local businesses.

Dedicated volunteers.

Children who grow into community leaders.

Neighbors who become lifelong friends.

These are the investments that define communities.

These are the investments that endure.

Looking Ahead

The preceding chapters have explored the County's economic foundation, workforce, education, fiscal opportunity, and community strength.

One question remains:

How should these ideas guide future leadership?

The final section of this strategy presents opportunities for collaboration that build upon the County's existing vision while preparing St. Mary's County for the decades ahead.

Editorial Draft

THE ST. MARY'S 2030 PROSPERITY STRATEGY

PART IV

Leading Forward

Leadership is not measured by the decisions that are easy.

It is measured by the willingness to make thoughtful decisions that serve future generations.

Leading Forward

Every generation inherits the responsibility of preparing the community for those who follow.

Some generations build schools.

Others preserve farmland.

Others expand infrastructure, strengthen local businesses, or invest in parks and public spaces.

Each leaves a legacy that extends far beyond its own time.

The opportunities presented throughout this strategy are offered in that same spirit.

They are not intended as mandates.

Nor are they intended to suggest that every development proposal should be approved or that every proposal should be denied.

Those decisions rightly belong to the Planning Commission, the County Commissioners, and the public process established by the citizens of St. Mary's County.

Instead, this chapter invites consideration of a broader question.

What kind of community do we hope future generations inherit?

Editorial Draft

Opportunities for Leadership

Building Upon the County's Existing Vision

Opportunity One

Continue Implementing the Comprehensive Plan

Perhaps the greatest strength of St. Mary's County is that its long-term vision has already been thoughtfully established.

The Comprehensive Plan reflects years of public engagement, professional planning, and community discussion.

Rather than pursuing new planning philosophies, County leadership has an opportunity to continue faithfully implementing the vision already adopted.

Directing future growth toward designated Development Districts remains one of the County's most effective tools for strengthening infrastructure while preserving rural landscapes, agricultural land, historic communities, and environmental resources.

Successful implementation should continue emphasizing consistency, transparency, and thoughtful stewardship.

Communities earn public confidence when long-term plans are implemented with discipline.

Opportunity Two

Recognize Community as Workforce Infrastructure

Throughout this strategy, one central theme has consistently emerged.

Communities compete for talent.

Roads and utilities remain essential.

So do schools.

Healthcare.

Housing.

Public safety.

Editorial Draft

Parks.

Recreation.

Neighborhoods.

Together, these assets create community infrastructure.

One opportunity before County leadership is to continue viewing these investments as components of a broader workforce strategy that strengthens both St. Mary's County and NAS Patuxent River.

The strongest workforce is built not simply through employment opportunities, but through communities where talented people choose to establish roots.

Opportunity Three

Establish the Next Generation Fund

Future prosperity presents an extraordinary opportunity.

County leadership may wish to explore establishing a dedicated reserve that captures a portion of new recurring revenues associated with long-term growth and invests those resources in transformational projects benefiting future generations.

Potential areas of investment could include:

- Future school construction.
- STEM education.
- Career and technical education.
- Transportation infrastructure.
- Parks and recreation.
- Broadband expansion.
- Public safety facilities.

The purpose of such a fund would not be to constrain future leaders.

Rather, it would create a lasting commitment that today's prosperity should continue creating tomorrow's opportunity.

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Opportunity Four

Strengthen the Partnership with NAS Patuxent River

The relationship between St. Mary's County and NAS Patuxent River represents one of the County's greatest strategic advantages.

Continued collaboration among County Government, NAS Patuxent River, educational institutions, The Patuxent Partnership, the College of Southern Maryland, local employers, and regional economic development organizations can further strengthen that partnership.

Communities that intentionally support the institutions supporting their economy are often best positioned for continued long-term success.

Opportunity Five

Continue Building the Workforce Pipeline

Preparing tomorrow's workforce begins long before tomorrow arrives.

County leadership can continue supporting partnerships that expand STEM education, apprenticeships, technical education, internships, and career pathways connecting local students with opportunities throughout Southern Maryland.

One of the greatest opportunities before St. Mary's County is ensuring that today's students become tomorrow's innovators, educators, entrepreneurs, military officers, healthcare professionals, and community leaders.

Opportunity Six

Preserve What Makes St. Mary's County Unique

Growth should never come at the expense of the qualities that make St. Mary's County extraordinary.

The County's rivers.

Its forests.

Its farms.

Its waterfront communities.

Its historic towns.

Editorial Draft

Its rural landscapes.

These resources are not obstacles to prosperity.

They are among its greatest strengths.

Thoughtful planning allows prosperity and preservation to advance together.

Opportunity Seven

Measure Success Differently

Communities often evaluate success through statistics.

Housing units.

Commercial development.

Tax revenues.

Population growth.

Those measures remain valuable.

Yet they do not tell the whole story.

The strongest communities also measure

Workforce retention.

Educational achievement.

Volunteerism.

Housing attainability.

Community engagement.

Fiscal sustainability.

Public trust.

Preservation of rural character.

The true measure of success is not simply what a community builds.

It is the quality of life created for the people who call it home.

Editorial Draft

Sidebar

Leadership

Leadership is rarely the pursuit of perfect answers.

More often, it is the discipline of balancing competing priorities with humility, transparency, and a commitment to the long-term public good.

A Shared Opportunity

Reasonable people will continue holding differing opinions regarding housing, growth, land use, infrastructure, and economic development.

Those differing perspectives deserve respect.

They reflect a community whose residents care deeply about the future of St. Mary's County.

This strategy was never intended to eliminate those differences.

Instead, it seeks to illuminate a shared opportunity.

An opportunity to strengthen the community supporting NAS Patuxent River.

To preserve the County's rural heritage.

To prepare future generations.

To invest wisely.

To implement the Comprehensive Plan thoughtfully.

To leave St. Mary's County stronger than we found it.

Those objectives belong to everyone.

Editorial Draft

Looking Ahead

The work of strengthening a community is never truly complete.

Every generation contributes another chapter.

The final pages of this strategy offer one closing reflection—not about housing or planning—but about stewardship, legacy, and the extraordinary opportunity entrusted to the people of St. Mary's County.

Closing Reflection

Looking Toward 2030

"Communities are not remembered for the challenges they faced.

They are remembered for how they chose to meet them."

Throughout its history, St. Mary's County has never stood still.

Generations before us transformed a quiet peninsula into the birthplace of Maryland.

They built churches whose steeples continue to define our skylines.

They cultivated farms that still shape our landscape.

They established waterfront communities whose identity remains inseparable from the Chesapeake Bay.

They welcomed Naval Air Station Patuxent River and built one of the Nation's most extraordinary partnerships between a military installation and the community supporting it.

Each generation inherited unique challenges.

Each also inherited extraordinary opportunities.

Today, those opportunities belong to us.

The decisions made during the coming decade will influence housing, education, infrastructure, transportation, economic development, environmental stewardship, and fiscal responsibility.

Reasonable people will continue approaching those decisions from different perspectives.

That diversity of thought is one of the defining characteristics of a healthy community.

The purpose of this strategy has never been to eliminate those differences.

Rather, it has been to illuminate one possible path forward.

A path grounded in objective analysis.

Guided by the Comprehensive Plan.

Supportive of NAS Patuxent River.

Protective of the County's rural heritage.

Focused upon future generations.

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The purpose of intentional growth is not to make St. Mary's County bigger.

It is to make St. Mary's County stronger.

Stronger schools.

Stronger neighborhoods.

Stronger partnerships.

Stronger fiscal stewardship.

Stronger opportunities.

And ultimately, a stronger community.

If future generations inherit a County that remains prosperous, beautiful, fiscally responsible, and uniquely St. Mary's, then today's leaders will have fulfilled one of the highest responsibilities of public service.

Not simply solving today's challenges.

Preparing tomorrow's opportunities.

If this strategy contributes, in some small way, to that effort…

Then it will have accomplished its purpose.

Editorial Draft

The St. Mary's Promise

We believe the future of St. Mary's County is strengthened through thoughtful stewardship.

We believe prosperity and preservation are partners.

We believe the success of NAS Patuxent River and the success of St. Mary's County are inseparable.

We believe today's prosperity should create tomorrow's opportunity.

We believe every generation has a responsibility to leave this community stronger than it found it.

This is our promise.

Not to pursue growth for its own sake.

Not to preserve the past by resisting every change.

But to move thoughtfully forward.

With humility.

With courage.

With stewardship.

For the benefit of those who will one day call St. Mary's County home.

Editorial Draft

THE ST. MARY'S 2030 PROSPERITY STRATEGY

A Civic Strategy for Strengthening the Community That Supports NAS Patuxent River

Prepared for

The St. Mary's County Economic Development Commission, Planning Commission, County Commissioners and the People of St. Mary's County

"The future of St. Mary's County will not be determined by the challenges we face…

…but by the wisdom, stewardship, and courage with which we choose to meet them."

First Edition

Editorial Manuscript

Matthew Burgan

Editorial Draft