

ECONOMIC DRIVERS AND CATALYSTS:

A TARGETED ECONOMIC DEVELOPMENT STRATEGY
FOR PRINCE GEORGE'S COUNTY, MARYLAND
EXECUTIVE SUMMARY



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PREPARED BY:

BATTELLE TECHNOLOGY PARTNERSHIP PRACTICE
MITCHELL HOROWITZ, VICE PRESIDENT AND MANAGING DIRECTOR

TOGETHER WITH THE

JACOB FRANCE INSTITUTE AT THE UNIVERSITY OF BALTIMORE
RICHARD CLINCH, PH.D., DIRECTOR OF ECONOMIC RESEARCH

AND

GREEN DOOR ADVISORS
MARISA GAITHER FLOWERS, PRINCIPAL



FOR ADDITIONAL INFORMATION, COMMENTS, OR QUESTIONS, CONTACT:

Jacqueline Philson

Project Manager, Countywide Planning Division

M-NCPPC, Prince George's County Planning Department

301-952-3627 (voice) | jacqueline.philson@ppd.mncppc.org (e-mail) | 301-952-4336 (TTY)

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This report presents the results of a year-long effort to create a targeted economic development strategy that will maximize the generation of new jobs in Prince George's County and diversify and grow the tax base that supports the county's government services and quality of life. The strategy focuses on:

- Identifying and targeting key high-growth industries that have the greatest potential to contribute to economic growth and development in Prince George's County.
- Leveraging the unique assets of Prince George's County to capture economic development opportunities in a competitive regional economy.
- Setting forth targeted strategies and actions to maximize economic development.

Strategy development was guided by a Project Steering Committee comprised of senior-level representatives from the County Executive's Office, the County Council, the Prince George's County Economic Development Corporation, the County Department of Housing and Community Development and the Prince George's County Planning Department.

The strategic planning process involved a broad collaborative engagement with economic development stakeholders from private industry, economic and workforce development, labor unions, higher education, real estate development, and community and government leadership. A Project Advisory Committee representing this broad group of stakeholders met in a day-long retreat to review, in detail, the analyses and provide input into the development of strategies and actions. In addition, feedback was solicited through separate presentations to:

- The M-NCPPC Prince George's County Planning Board
- The Prince George's County Economic Development Corporation Board and staff
- The Baltimore-Washington Chamber of Commerce
- The Greater Prince George's Business Roundtable
- The Prince George's County Chamber of Commerce
- The Andrews Business and Community Alliance

- The Bowie Chamber of Commerce
- The Maryland National Capital Building Industry Association
- The Laurel Board of Trade
- The Greater Beltsville Business Association
- Leadership Prince George's, Inc.
- Prince George's County Council members

To assist in the analysis and strategy development, a consulting team, led by the Battelle Technology Partnership Practice, was retained. The Technology Partnership Practice (TPP) is the economic development consulting arm of the world's largest independent nonprofit research and development organization. TPP is a national leader in advancing industry cluster-driven strategies with an established track record in developing and advising many of the most successful modern development programs in the United States.

Collaborating with Battelle was the University of Baltimore's Jacob France Institute, a leading Maryland research group at the University of Baltimore's Merrick School of Business—that focuses on industry, business climate, workforce development research, planning, and evaluation—and Green Door Advisors, LLC (GDA), a real estate advisory firm with comprehensive knowledge of the real estate and economic development market in Prince George's County.







Prince George's County has a diverse, high-value economy that includes the following assets:

- Presence of numerous federal installations, such as the Internal Revenue Service, Census Bureau, Joint Base Andrews, NASA Goddard, Beltsville Agricultural Research Center (BARC), the National Oceanic and Atmospheric Administration (NOAA), and the Army Research Laboratory
- Close proximity to the Nation's Capitol.
- Well-developed transportation and mass transit network.
- Well-educated workforce pipeline.
- Strong university base, which includes the region's top research university and many other higher education assets generating top talent needed by industry.
- Available land for development and competitive real estate costs.

Given this wealth of economic assets, it is not surprising that the county's industry base is comprised of a number of sectors that offer high-skilled, high-paying jobs. These industry sectors include information technology services, aerospace and defense, and the federal government. This strong industrial base, in turn, has historically contributed to Prince George's County's high standard of living.

However, as a result of ever increasing economic competition, the county's assets that were leveraged into economic prosperity in the past will not necessarily be sufficient to ensure economic growth in the future. As the economic performance of Prince George's County over the past decade has made clear, "business as usual" will not generate the jobs and growing tax base necessary to support a rising quality of life for Prince George's County residents.

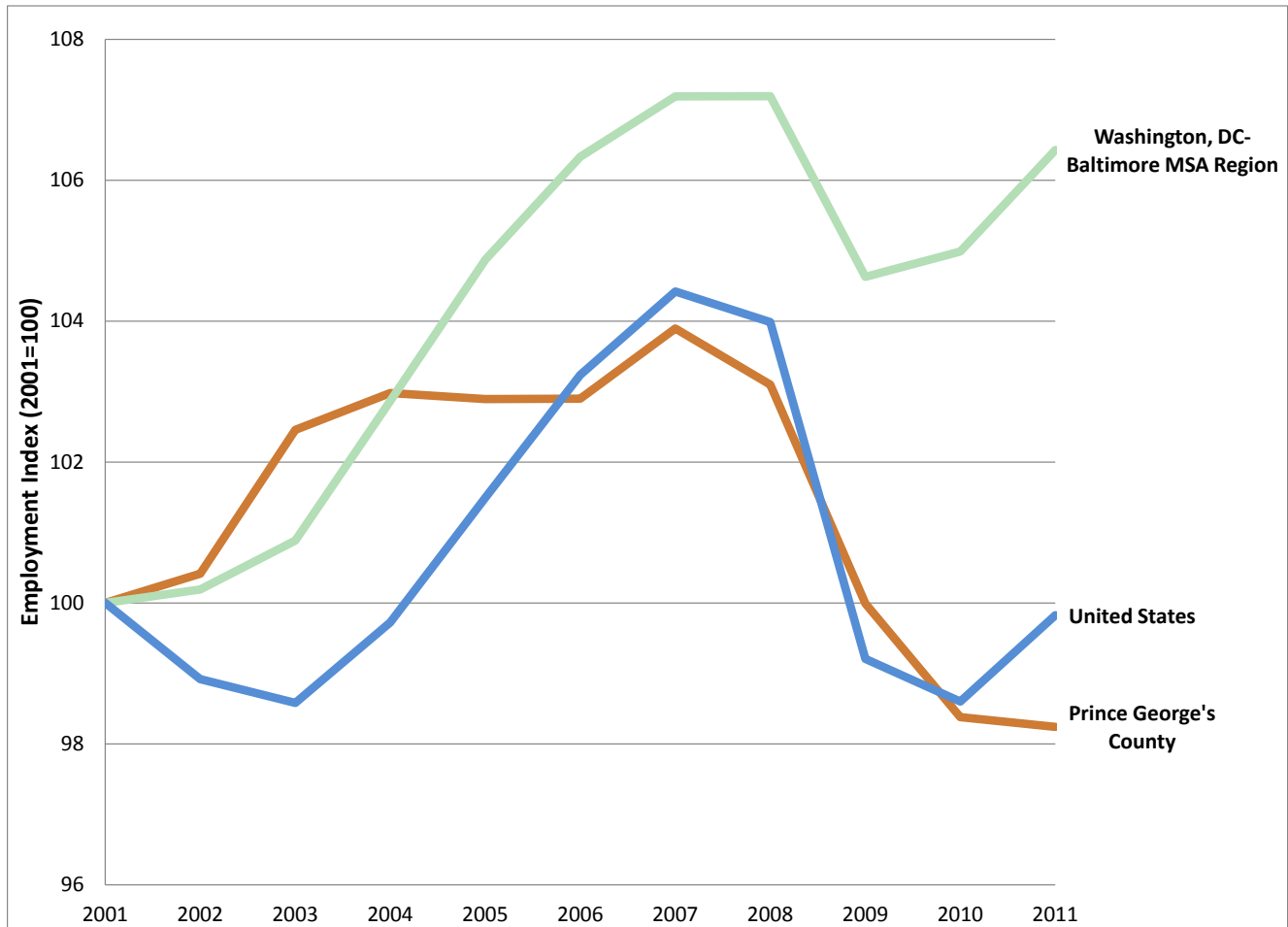
During the past decade, before the Baker Administration and the new County Council took office, Prince George's County lost ground in economic development, even as the broader Washington, D.C.-Baltimore region, in which it is centrally-located, made impressive gains. From 2001 to 2011, Prince George's County lost nearly 5,400 jobs, or 1.8 percent. During the same time, the overall Washington, D.C.-Baltimore region gained over 250,000 jobs, a gain of 6.4 percent. Importantly, the Baker Administration and County Council quickly realized the challenges and made economic development its top priority.

The economic performance over the past decade has made clear that "business as usual" will not generate the jobs to support a high quality of life for Prince George's County residents.

This weaker economic performance is also found among many of the leading high-skilled, high-paying industries driving economic growth in Prince George's County. For instance, aerospace and defense employment declined in Prince George's County by 2.7 percent from 2001 to 2011, while growing within the Washington, D.C.-Baltimore region by 9.5 percent. Similarly, information technology services employment declined in the county by 12.4 percent from 2001 to 2011, while growing 2.4 percent in the region. This trend of lagging behind regional industrial growth is even found in U.S. Federal Government employment. From 2001 to 2011, Prince George's County increased its federal employment by 6.2 percent; however, the region by comparison enjoyed an 18.4 percent rise in federal employment. Of the industry sectors analyzed, the rate of employment growth was greater in Prince George's County only for the Travel and Tourism industry sector, growing 63.8 percent for the county compared to 33.8 percent for the region.



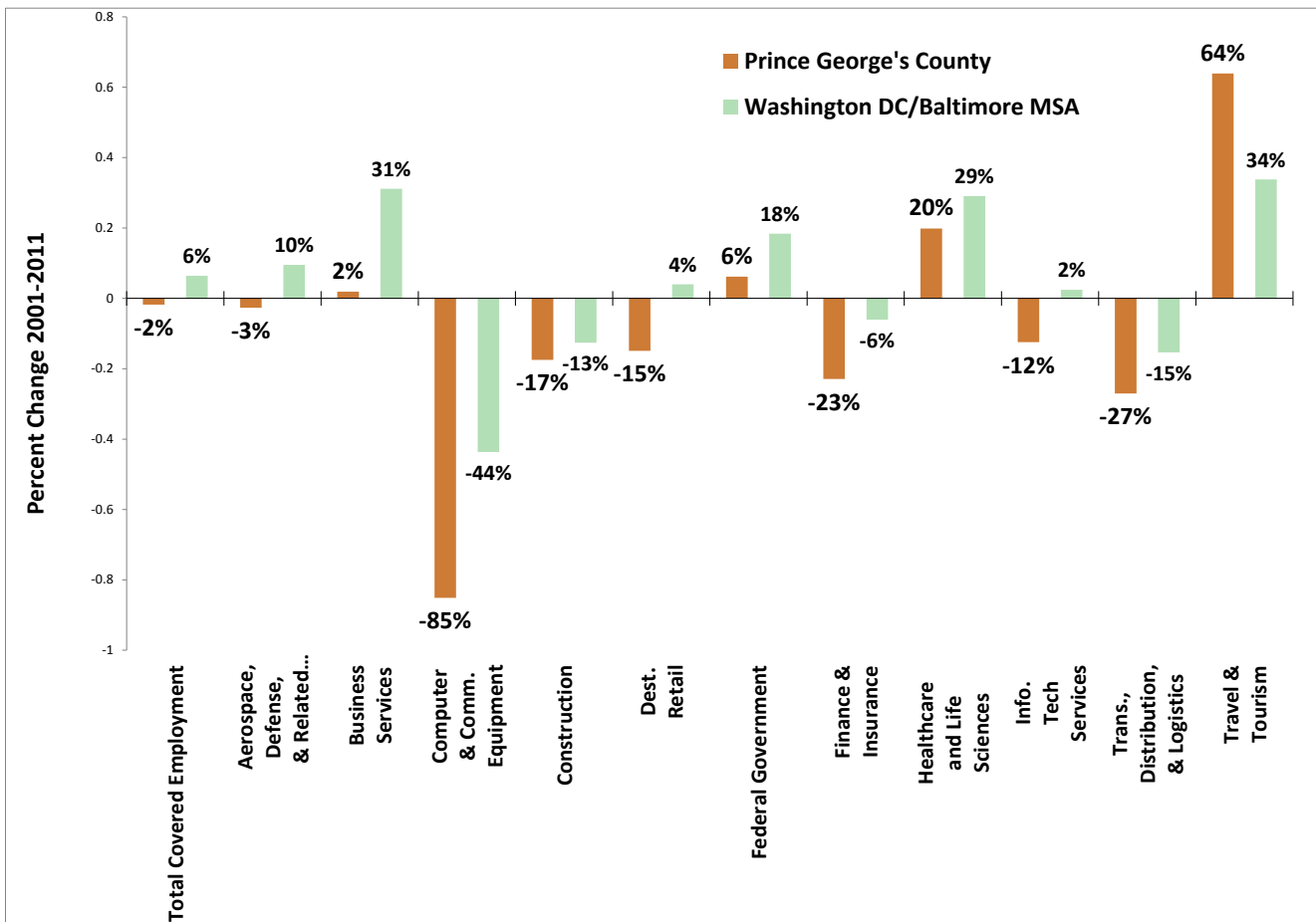
Figure ES-1: Employment Index for Prince George’s County, Washington D.C.- Baltimore Region and the United States (2001–11)¹



Source: Battelle analysis of Bureau of Labor Statistics, QCEW data; enhanced file from IMPLAN. 2011

¹ An index was used to compare the changes in employment over the eleven year period between the vastly different sized study areas of Prince George’s County, the Washington D.C.-Baltimore Region, and the United States. The index for the table and graph was calculated by taking the employment during a variable year (Year X+1) divided by a constant base year (Year X)

Figure ES-2: Percentage Change in Employment for Prince George's County and Washington D.C.-Baltimore Region (2001-11)



Source: Battelle analysis of Bureau of Labor Statistics, QCEW data; enhanced file from IMPLAN.

These economic trends imply a lack of regional economic competitiveness, which results in a lost opportunity for improving the quality of life, economic vitality, and tax base in Prince George's County. Losing economic ground undercuts the quality of life in Prince George's County by limiting job opportunities for local residents. If Prince George's County had kept pace with regional growth over the 2001 to 2011 period, there would have been a gain of over 19,000 jobs in the county rather than a loss of over 5,000. Job loss undermines local tax revenues and limits the county's ability to deliver improved services that are critical for raising the quality of life. As the Baker 2010 Transition Team Report explains: "Without a dramatic increase in the strength and breadth of its tax base, the county will not be able to pursue its ambitious initiatives and goals. In both conduct and message, the County Executive's Administration should embrace the importance of growing the county's tax base through smart and aggressive development initiatives."²

***Economic drivers** represent those industries that offer the best opportunities for advancing high quality job creation to grow the local economy.*

***Economic catalysts**, meanwhile, are the assets found in Prince George's County from its research institutions, talent base, transportation network, commercial real estate base, and other development capacities that offer competitive advantages to build upon.*

To successfully advance a targeted economic development strategy, Prince George's County must harness the economic drivers and economic catalysts found throughout the county. The most promising development opportunities for Prince George's County are those that align its economic drivers and economic catalysts—so they represent not only where the potential for economic growth across the industrial base is strongest, but where the county's economy has the capacity to grow at a scale that makes a difference to the overall economy. **Based on the economic drivers and the economic catalysts found within Prince George's County, a two-prong economic development strategy is being proposed (see Figure ES-2):**

- The first component of the strategy focuses on advancing each of the targeted industry clusters that are likely to serve as ***economic drivers*** in the years ahead.
- The second component of the strategy focuses on addressing crosscutting economic development priorities that are likely to serve as ***economic catalysts*** in the future.

² See Baker 2010 Transition Team Report, March 11, 2011, page 21.

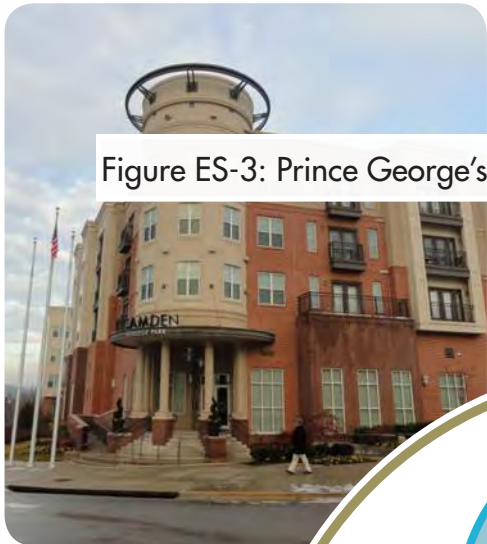


Figure ES-3: Prince George’s County Two-Prong Economic Development Strategy



- DRIVERS**
- Target Industry Cluster Development:
- Federal Government
 - Business Services
 - Healthcare and Life Sciences
 - Information, Communication, and Electronics





FOUR TARGETED INDUSTRY CLUSTERS IDENTIFIED FOR ADVANCING ECONOMIC DEVELOPMENT IN PRINCE GEORGE'S COUNTY

Past economic development strategies for Prince George's County have recognized the importance of industry clusters for the county's economic development efforts; however, these strategies were, largely, not acted upon.³ The first component for Prince George's County's targeted economic development strategy is based on a comprehensive assessment of the economic performance of industry clusters found in Prince George's County and across the region, and identifies those specific industry clusters that have the best opportunity to drive economic growth in the county in the years to come. Two guiding principles informed the identification of industry targets:

First Principle **Strategic focus on primary or economic base industries that generate new income and wealth for the county.**

Primary industries serve customers and markets that go beyond local residents and businesses, and as a result, generate income from sources outside of the county. For instance, U.S. Federal Government activities in the county are a primary, or economic base, industry because they largely serve those outside of the county and are supported by national tax revenues. Similarly, most aerospace and defense companies and information technology services also primarily serve markets beyond those of local county residents and businesses. Examples of non-primary activities include restaurants, dry cleaners, and local government services in the county, which largely serve only county residents. While these non-primary industries address local needs, and are therefore critical for the quality of life in the county, they do not generate new income in the county and instead rely primarily on local market demand.

Second Principle **Primary focus on broad industry clusters that drive economic development and recognize that individual industries do not stand alone within regional economies, but are better understood as being part of a broader complex of industries that are interrelated.**

³ The 2005 *Prince George's County Five Year Economic Development Strategy* called for a specific goal to: "Identify, grow, and attract targeted industries."

As Michael Porter, one of the world’s leading experts in business and regional competitiveness, explains:

“Clusters are a striking feature of virtually every national, regional, state and even Metropolitan economy, especially in more economically advanced nations...Clusters are not unique; however, they are highly typical—and herein lies a paradox: the enduring competitive advantages in a global economy lie increasingly in local things—knowledge, relationships, motivation—that distant rivals cannot match.”⁴

The industry clusters found within a local economy represent closely related industries that are logically connected. Many industry clusters share a common market that they serve, while others are based more on shared “know how” such as in biosciences or information technology.

Eleven broad industry clusters were identified out of an initial set of 23 industry clusters found within the county and the broader region. A detailed assessment guided the selection of industry targets for Prince George’s County.⁵ The assessment included:

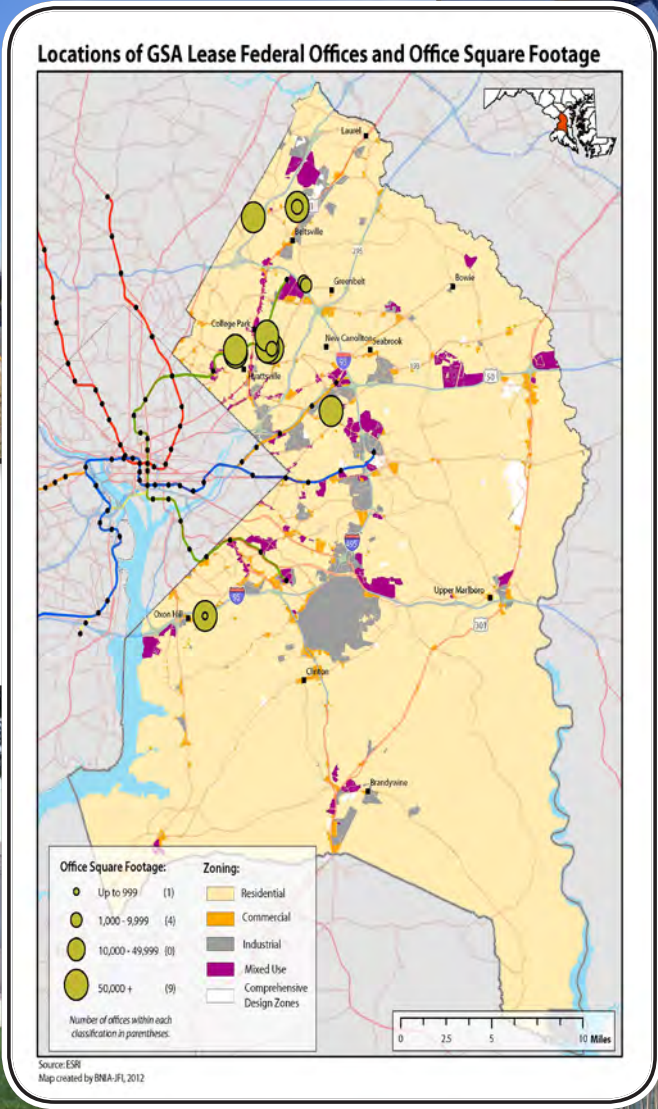
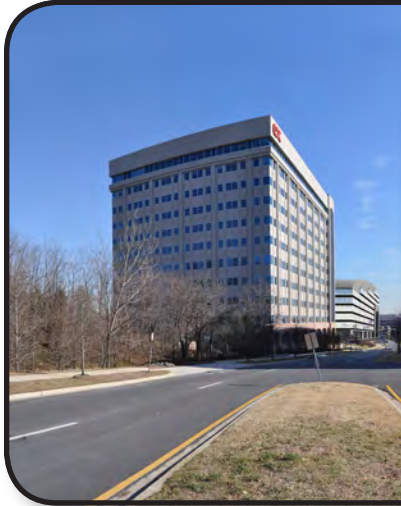
- The economic performance for each of the industry clusters, both in Prince George’s County and relative to the region and nation.
- The likely growth scenarios for the industry clusters.
- The quality of jobs generated by the industry clusters.
- The extent of broader industry linkages or multiplier impacts given the overall industry structure of Prince George’s County for each of the industry clusters.
- The presence of institutional (both federal and university) drivers to support the growth of the industry cluster in Prince George’s County.

Based on the results of this assessment, and guidance from the Steering Committee, the Project Advisory Committee, and other key stakeholder groups, four key industry clusters were identified as the focus for targeted development strategies to advance economic development in Prince George’s County:

The **U.S. Federal Government** stands as a current industry strength across the region—indicated by its concentration of employment in comparison to the nation—and the fact that it is growing in employment at a rate that is faster than the nation. Prince George’s County, however, trailed behind the region in overall job gains from the federal government sector over the 2001 to 2010 period. While the county grew by 6.2 percent in federal government employment from 2001 to 2011, this rate of growth was significantly lower than the regional

⁴ Michael Porter, Harvard Business School Professor, “Clusters and the New Economics of Competition,” Harvard Business Review, November-December 1998.

⁵ See Prince George’s County Planning Department of The Maryland-National Capital Park and Planning Commission, A Study of Occupational Shifts and Workforce Characteristics, Prepared by Battelle Technology Practice, November 2011 for more details on the identification of the initial set of industry clusters based on county and regional industry structure. Full report can be found at: <http://www.pgplanning.org/Resources/Publications/Occupational.htm>



Photograph by the U.S. Census Bureau, Public Information Office (PIO)

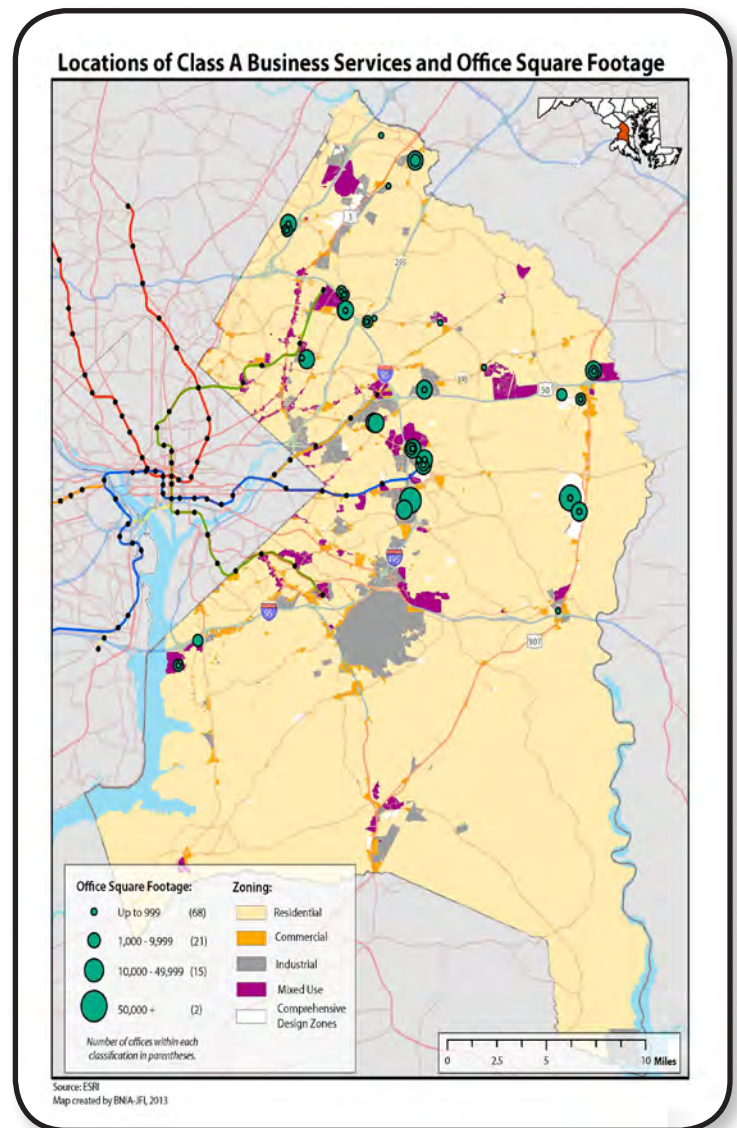
growth of 18.4 percent. Despite the fact that federal government employment is expected to decline nationally in the near-term, especially if the sequestration cuts stay in effect, it will nevertheless remain a strong presence in the region due to its historic concentration.

Prince George’s County is well positioned to maximize the competitiveness of county sites, both to maintain current federal leases in the county and to win future federal leases that are set to expire within the next several years for sites outside of the county. An analysis of federal leases by Green Door Advisors identified approximately 25 million square feet of federal leased space expiring over the next five years in the surrounding jurisdictions of Montgomery County, Fairfax County, Arlington County, and the City of Alexandria.

The potential selection of Prince George’s County as the future home for the new consolidated Federal Bureau of Investigation (FBI) headquarters presents a major opportunity for the county to expand its employment base. Prince George’s County has many advantages when competing for federal leases, including its extensive transportation and mass transit network, available land for development, competitive real estate costs, and skilled workforce. But a weakness related to attracting federal government leases is the extent and quality of transit-oriented development (TOD) in the county.

Business services stands as a current industry strength across the region and is an emerging strength in the county. The business services industry cluster involves a wide range of activities that support the operations of companies and federal government agencies—from strategic planning to marketing to back office management to building cleaning and maintenance. These services may be provided by employees of the company or may be purchased from contractors.

The growth of the business services industry cluster is highly dependent upon U.S. Federal Government procurement, and therefore its advancement is linked to growing the federal government presence in the county. Across the Washington, D.C.-Baltimore region, this industry cluster grew



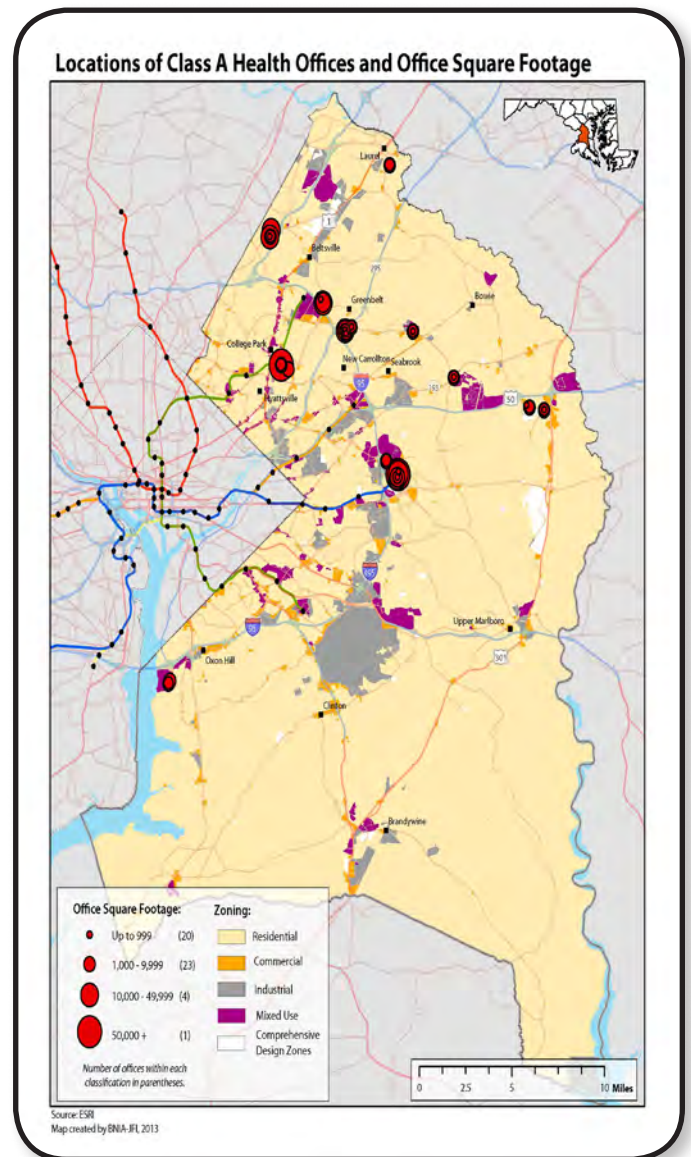
substantially—by 31.1 percent—over the 2001 to 2011 period. The business services cluster is a significant industry specialization for the region, standing 58 percent higher in its industry concentration for the region than nationally. In Prince George’s County, the business services industry cluster is not yet an industry specialization, growing at a much slower pace than the region with a 1.9 percent gain in employment from 2001 to 2011.

As an emerging industry cluster for the county, the focus needs to be on winning more of the growth taking place at the regional level. A specific opportunity for the county is to increase the amount of high-value business services offered, such as management consulting, that currently have a stronger presence across the region than in the county. High-value business services employment provides higher-skilled, higher-paying employment opportunities for the residents of Prince George’s County.

Health Care and Life Sciences stands as an emerging opportunity for the county. Prince George’s County has shown strong growth in the health care and life sciences industry cluster in recent years, growing by 13.4 percent from 2007 to 2011—a period covering the recession and the first two years of recovery. This strong recent growth in Prince George’s County well outpaced the region’s and nation’s growth rate, 9.7 percent and 7.5 percent, respectively.

The health care and life sciences industry cluster in Prince George’s County will make an even more significant leap forward with the establishment of the University of Maryland Medical System’s (UMMS) new regional medical center in the county. This new UMMS regional medical center is intended to reverse the strong outflow of Prince George’s County residents seeking medical care in neighboring jurisdictions. The presence of the new UMMS regional medical center will also encourage more research-oriented life sciences development in Prince George’s County through clinical research connections with universities in the county and life sciences companies.

In the smaller, but growing non-clinical biosciences industries, the challenge is to define a niche that Prince George’s County can serve. Prince George’s County is centrally located between the region’s hub of non-clinical biosciences industry in the Shady Grove area, the National Institutes of Health in Bethesda, the Food and Drug Administration in White Oak, and the large academic medical complexes at Johns Hopkins University and University of Maryland in Baltimore. Among the key assets for the county are the University of Maryland College

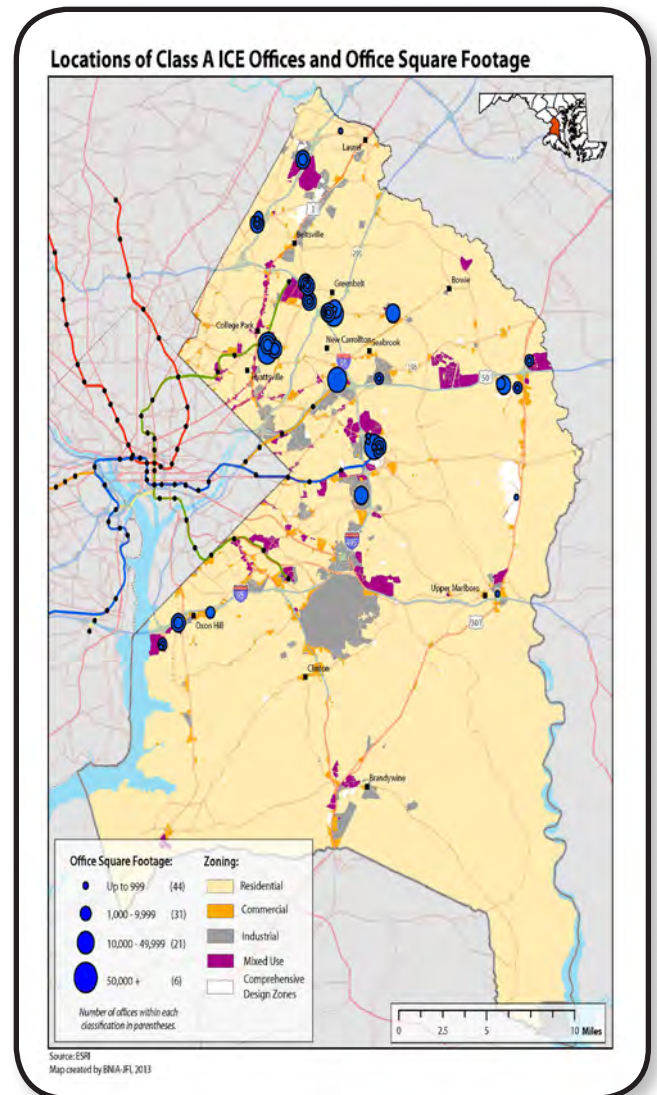


Park (UMCP), the USDA Beltsville Agricultural Research Center, and the location of a large FDA facility focused on food safety at the University of Maryland's M Square Research Park. This suggests an opportunity for Prince George's County to further gain market share of non-clinical biosciences industries by targeting specific niches. One niche might focus on clinical research connections with universities and industry at the new UMMS regional medical center. Another niche might focus on nutritional and food safety research activities with industry leveraging the presence of the Beltsville Agricultural Research Center, FDA and the University of Maryland's School of Agriculture.

Information, Communication, and Electronics (ICE) industries bring together three industry clusters involving information technology, computer and communications equipment, aerospace/defense-related research and development, and engineering. ICE represents the heart of high technology industries found within Prince George's County and across much of the region. Not surprisingly, ICE industries are a leading industry specialization in Prince George's County, with the county having a 73 percent higher industry concentration in ICE industry employment than the nation. The employment growth of the ICE industry cluster has not been strong in Prince George's County over the past decade as it declined by 12.6 percent from 2001 to 2011. Across the Washington, D.C.-Baltimore region, the ICE industry cluster is also an industry specialization, but recorded only a modest growth of 2.5 percent from 2001 to 2011.

ICE industries and their associated technologies are critical to the extensive presence of federal defense and space facilities in the county and across the region. The ICE cluster is critical to the following military and space programs.

- NASA Goddard, Army Research Labs in Adelphi
- Joint Base Andrews
- The National Oceanic and Atmospheric Administration (NOAA) with facilities in Suitland and at the University of Maryland M Square Research Park
- The National Security Agency at the University of Maryland M Square Research Park
- Fort Meade and Aberdeen Proving Ground



The rise of network-centric warfare involving the integration of computing networks, mobile communications, and electronics and computing devices on the battlefield, in particular, make these technologies essential for our nation’s defense. It is also critical to protect these networks and to find ways to attack the networks of our enemies, giving rise to the importance of cybersecurity.

For commercial uses, a similar integration of information, communications, and electronics technologies is occurring, and the critical need for cybersecurity to protect networks and information is growing. This convergence of communications, computing, and content generation is now blurring the boundaries of industries. For example, telephone and cable companies are increasingly vying to provide similar services, both offering broadband access to the Internet and, with the rise of voice-over-Internet protocol technology, each is able to offer basic voice communications. The separate worlds of telecommunications, computers, and media/entertainment electronics are becoming highly overlapping, in both uses and production. Mobile phones now offer both voice and data capabilities. Therefore, specific industry development strategies need to view the broad ICE industry cluster as an integrated grouping.

For Prince George’s County, it is important to maximize its potential as a location for this growing high technology industry cluster in serving federally-driven military and space activities, as well as in broader commercial applications.



CONTRIBUTING INDUSTRY CLUSTERS

In consultation with the Project Advisory Committee and other key stakeholders, it was also noted that all of these target industry clusters were further advanced by linking with the Travel and Tourism industry cluster and Transportation, Distribution and Logistics industry cluster. While these two clusters are important contributors to the county's economy, they do not stand alone as leading industry targets for economic development.

- The **Travel and Tourism industry cluster** is an important supportive cluster for all of the targeted industry clusters because it provides important amenities through the availability of hotels and meeting/conference spaces. This industry cluster enjoyed strong growth in Prince George's County over the 2001 to 2011 period, growing from 3,709 jobs in 2001 to 6,079 jobs in 2011. Still, it is a relatively small industry cluster in the county and paid an average wage of \$33,336 in 2011, well below the county's average wage of \$51,120. In addition, much of the growth of the Travel and Tourism cluster going forward will be related to increasing the number of hotels and other amenities around the broader development agenda for advancing transportation-oriented development and the opportunity for casino gambling recently approved by state voters to further build-out the area around National Harbor.
- The **Transportation, Distribution, and Logistics industry cluster**, meanwhile, is already a contributor to federal government activities through warehouse locations found in Prince George's County, as well as recent growth in life sciences that combines the distribution of life sciences products with laboratory services. However, by itself this industry cluster does not stand out as a target for industry development. For Prince George's County and the broader Washington, D.C.-Baltimore region, the Transportation, Distribution, and Logistics industry cluster has been declining significantly over the past decade, with the county losing 27 percent of its jobs in this industry cluster from 2001 to 2011, and the region losing 15 percent of its jobs. The Transportation, Distribution, and Logistics industry cluster's employment is also not heavily concentrated for either the county or the region. This weak economic performance does not reduce the value of having this cluster in supporting the growth of other industry drivers in the county, but suggests it is not a top target for economic development.



A PLAN OF ACTION

For the four targeted industry clusters, it is critical that Prince George's County set out an organized approach to pursue their development as part of the county's overall economic development activities and services. In traditional economic development practices, business development activities are usually focused on addressing the needs of individual businesses on an ad hoc basis. Industry cluster development, in contrast, seeks to work collectively across businesses within a cluster to identify shared needs and opportunities and pursue common services, such as addressing gaps in workforce skills, accessing financial capital, ensuring the availability of quality facilities, improving access to innovations for commercialization, among other common cluster needs.

Due to the unique nature and individualized needs of each industry cluster, cluster-specific actions are outlined in Table ES-1. In addition to the cluster-specific actions, there are also three specific actions that are being proposed across all four industry clusters to more broadly integrate cluster development into the county's economic development activities and services:

- Dedicate support for industry cluster development and networking
- Prioritize county incentives to the industry clusters
- Focus on workforce connections to the industry clusters (K-12, post-secondary, and incumbent worker).



Success in economic development depends upon identifying and advancing the key industry clusters driving economic growth specific to a particular state or local economy.

As the National Governors' Association advises in A Governor's Guide to Trade and Global Competitiveness:

"... build on the strengths found in local "clusters of innovation" – distinct groups of competing and cooperating companies, suppliers, service providers and research institutions."

Table ES-1. Tailored Development Approaches Recommended for Targeted Industry Clusters

For each of the targeted industry clusters, a set of development approaches are recommended as follows:

Federal Government

- Establish and sustain dedicated county economic development staff resources with established procedures in place to target, find, and take advantage of federal leasing opportunities.
- Proactively engage the private development and broker community to identify and pursue GSA opportunities.
- Make the needed public and private investments in transit-oriented development (TOD).
- Seek to have parity in the GSA rent cap across jurisdictions in the Washington, D.C. region and to allow rates that reflect the differences between a basic lease renewal in an existing building and one that requires new construction or costly upgrades.
- Advance the adoption of more stringent “proximity” clauses in federal government contracts by federal agencies operating in Prince George’s County in order to enhance the presence of government contractors in the county.

Business Services

- Seek support from existing business leaders to assist in the retention and expansion of business services (headquarters, administrative services, and management consulting).
- Pursue outreach to business services companies connected to key federal agencies in the county.
- Leverage TOD with the use of incentives.
- Build on existing clusters to attract business services companies from elsewhere in the region.

Table ES-1. Tailored Development Approaches Recommended for Targeted Industry Clusters (Continued)

Healthcare and Life Sciences

- Establish the planned University of Maryland Medical System (UMMS) regional medical center as an extension of this top quality academic medical center into the county. This will result in access to high-quality medical care specialties, graduate medical educations, and research. In addition, translational and clinical research connections should be advanced that link this new UMMS regional medical center with the basic biological sciences and bioengineering capacities at the University of Maryland, College Park to advance broader life sciences innovation and industry development in the county. Address the lack of commercial bioscience wet lab space available in Prince George’s County through targeted use of existing county incentives.
- Consider partnering with the Beltsville Agricultural Research Center (BARC) on its Enhanced Use Lease Capacity to offer a site for life sciences companies, particularly targeting satellite labs for the many companies that have cooperative research and development agreements (CRADAs) with BARC.

Information, Communication and Electronics Industries

- Accelerate and enhance the development of the University of Maryland M Square Research Park as a high-quality mixed-use, “live-work-play” development since it stands as the epicenter for talent and research in information, communications, and electronics in Prince George’s County.
- Leverage the research industry drivers and their technology transfer activities with an active commercialization and entrepreneurial development organization that can integrate and help grow the technology business community.
- Advance industry networking in Prince George’s County to focus on digital media, e-commerce, and big data to serve both federal and commercial activities leveraging statewide efforts of the Technology Council of Maryland and other organizations in the region.

DEVELOPMENT STRATEGIES FOR CROSSCUTTING ECONOMIC PRIORITIES

The second component of the strategy builds upon the analysis of economic catalysts in Prince George’s County to address crosscutting economic development priorities. The purpose of this focus is to foster and sustain growth across the targeted industry clusters as well as the broader economic base. When reviewing the county’s economic catalysts that can support or impact the development of the selected target industry clusters, numerous development factors were examined in-depth, including:

- Business Climate Perceptions of Industry
- Technology Commercialization Activity
- Development Infrastructure
- Financial Resources
- Small and Minority Business Environment
- Labor Market
- Quality of Life Factors
- Tax Climate
- Commercial Real Estate



The assessment of economic catalysts found a number of specific strengths and opportunities in Prince George’s County, including:

- **Presence of major research university and federal research labs.** Prince George’s County is home to one of the nation’s largest land-grant universities–The University of Maryland College Park (UMCP)–as well as several leading federal research institutions, including the Beltsville Agricultural Research Center (BARC), the National Oceanic and Atmospheric Administration (NOAA), the Army Research Lab, and NASA Goddard.
- **Presence of highly-skilled talent pipeline found among its residents who must commute to jobs outside of the county and new graduates from universities and colleges.** As detailed in the 2011 Study of Occupational Shifts and Workforce Characteristics report, Prince George’s County possesses a strong pipeline of highly-skilled talent.

One key talent pool of well-educated and experienced workers is found among the 61 percent of employed county residents who commute for jobs outside of the county. These out-commuters are more highly educated than residents working in the county, with 44 percent of out-of-state commuters (primarily to Washington,

D.C. and Virginia) and 32 percent of commuters to other Maryland jurisdictions having attained a bachelor's degree or above, compared to 29 percent for all residents aged 25 and older.

There is also a strong pipeline of graduates in highly-skilled occupational areas, such as computer sciences, engineering, and business and financial operations, which will exceed expected job growth in the county even under high-growth scenarios. This strong pipeline reflects the breadth of post-secondary institutions found in the county, including the University of Maryland College Park (UMCP), Bowie State University, Capitol College, University of Maryland University College, and Prince George's Community College.



- **Central location and extensive road network and mass transit infrastructure.** This includes the recently completed Intercounty Connector bridging Prince George's County and Montgomery County, interstates I-95 and I-495, the Washington-Baltimore Parkway, and I-295 linking with the District of Columbia and Northern Virginia. The county also has a considerable mass transit infrastructure with 15 Metro stations found across the Blue, Orange, and Green lines, as well as an AMTRAK station and MARC stations.

- **Large base of small and minority business.** Based on latest data available from the U.S. Census, the county was home to 3,780 minority businesses employing 33,379 workers in 2007 and representing 33 percent of county businesses and 13 percent of county employment in minority businesses. This stands as they highest share of minority business employment among counties and cities in the Washington, D.C.-Baltimore region.

- **Availability and affordability of commercial real estate as well as lower cost of land and many sites for development.** Prince George's County has a sizable commercial real estate market with approximately 8.5 million square feet of Class A office space, 52.6 million square feet of industrial space, and 11 million square feet of flex market space. The average leasing rates for Class A office space in Prince George's County is \$20.29 per square foot in the first quarter of 2012, compared to \$36.55 per square foot for the Washington, D.C. Metropolitan area—a significant \$16.26 per square foot difference. Similarly, Prince George's County has lower leasing rates than the Washington, D.C. region for industrial and flex commercial space, though the differences are smaller: \$2.10 per square foot for flex commercial space and \$0.54 per square foot for industrial space. Unfortunately, there is also a sizable vacancy rate in Prince George's County of 22 percent in 2012 for Class A commercial office space, 18 percent in flex market space, and 9 percent in industrial office space.



- **Growth of amenities found in the fast growing travel and tourism sector.** The travel and tourism industry sector has grown significantly in Prince George’s County representing growth in hotels, meeting and conference space, and other amenities. This industry cluster enjoyed strong growth in Prince George’s County over the 2001 to 2011 period, growing from 3,709 jobs in 2001 to 6,079 jobs in 2011. National Harbor has been a key development for this sector.

Still, there are critical gaps and weaknesses in Prince George’s County’s economic asset base that needs to be addressed, including:

- Low rates of new business start-ups and low levels of venture capital investment combined with a poor track record in keeping high-growth potential technology start-ups located in the county as the companies grow and expand.
- Lack of identity and brand for Prince George’s County in industry development and broader economic assets.
- A lack of TODs offering walkable “live-work-play” areas in the county, together with a burdensome development process.
- Quality of life concerns relative to the region.



The opportunities and gaps found in this analysis of economic catalysts suggest three development priorities:

- **Promote Entrepreneurship, Talent, and Innovation Collaborations** to better leverage the presence of major research university and other university/college and federal lab assets.
- **Establish Competitive Places for Development** in the county for business development that address development process and advance walkable “live-work-play” communities as a key component for transportation-oriented development.
- **Launch Pro-active Outreach Marketing and Raise Quality of Life** to increase the awareness of the county’s competitive advantages for business development, address the business image of the county, and continue to raise the quality of life in the county.

PROMOTE ENTREPRENEURSHIP, TALENT, AND INNOVATION COLLABORATIONS

STRATEGIC NEED FOR PRINCE GEORGE'S COUNTY

Given the extensive presence of research institutions in Prince George's County, including a leading research university and several federal laboratories, the focus on driving economic development by promoting connections to innovative research, entrepreneurship, and talent would seem to be a natural one. But, despite this extensive research and talent base, the evidence is that Prince George's County is not doing well in translating these research, entrepreneurship, and talent assets into economic development that sticks.

Typically, the presence of a leading research university generates a strong environment for innovation and technology industry development for local jurisdictions within major Metropolitan areas. This environment includes having access to top talent, start-up companies based on new research discoveries, and specialized labs that can assist industry. However, it is the ability to create a physical "live-work-play" environment around these research universities that creates a powerful economic development driver. This has been the case for Cambridge, Massachusetts in the Boston region, Boulder, Colorado in the Denver region, and Palo Alto, California in the Silicon Valley, among others. ***It is imperative for Prince George's County to work with its research institutions to advance this kind of development.***

Prince George's County is home to the University of Maryland College Park, one of the nation's largest research universities—as well as several leading federal research institutions including the Beltsville Agricultural Research Center (BARC), the National Oceanic and

Build upon key strengths:

- Presence of major research university and federal research labs
- Presence of high-skilled talent across both residents commuting to jobs outside of the county and new graduates.

Address key weakness:

- Low rates of overall new business start-ups
- Poor track record in keeping high growth potential technology start-ups in the county
- Low levels of venture capital



Atmospheric Administration (NOAA), the Army Research Lab, and NASA Goddard. An assessment of how this collection of research institutions relate to the targeted industry clusters finds a strong degree of connection with the Information, Communications, and Electronics industry cluster as well as with the Healthcare and Life Sciences industry cluster.

Even with these major research assets, Prince George's County is falling short in gaining major economic benefits from this innovation activity. For instance, the new, high growth potential technology ventures being started in Prince George's County are not staying. The UMCP Office of Technology Commercialization tracks start-up companies formed based on licensed university technology.⁶ Based on data from their website, a total of 21 start-up companies have been formed to commercialize UMCP technology since FY 2006. By FY 2011, the vast majority of these 21 companies remain located in Maryland (18), but only five of these companies are located in Prince George's County. Thus, while UMCP is clearly a key regional generator of technology and start-up companies, many of these companies choose to locate outside of the county.

More broadly, this strategic effort can address the finding that the economic base industry clusters in Prince George's County have not fared well in the job gains from new company formation. There was a substantially higher level of employment losses from business establishment closings than gains in employment from business establishment births in the county, with a birth to closing ratio of just 0.68. Moreover, the level of venture capital investments in the county—a measure of having high growth potential new businesses—is low.

PROPOSED ACTIONS:

Four specific actions are being proposed to advance this crosscutting economic development priority:

- Create a Prince George's County Innovation and Commercialization Collaborative.
- Develop Financing Approaches for High Growth Potential Emerging Technology Companies.
- Advance and Link with Local MBE Development.
- Promote Talent Bridges to Connect Companies in Targeted Industry Clusters with Top Talent Being Generated or Attracted by Universities and Federal Labs in the County.



⁶ See University of Maryland web site <http://www.otc.umd.edu/Start-ups.html#09>. The Jacob France Center at the University of Baltimore conducted a company by company analysis using their databases and identified the location of each University of Maryland start-up company.

ESTABLISH COMPETITIVE PLACES FOR DEVELOPMENT

STRATEGIC NEED FOR PRINCE GEORGE'S COUNTY

Prince George's County appears to have a sufficient supply of real estate available at prices that are lower than in peer jurisdictions. This is a significant competitive advantage for the county. In particular, Prince George's County has a much higher vacancy rate in Class A office space and flex market space than found across the region, which has persistently stood near or above 20 percent over the last five years in the county, and has translated into lower leasing rates, especially for Class A office space. In industrial space, the county has a significant share of the region's industrial space and is on par with the region in its level of vacancy, although leasing rates are below the average in the Washington, D.C. Metropolitan area.

Another advantage for Prince George's County is its central location in the region, neighboring multiple counties and the District of Columbia, as well as an extensive road network, including the recently completed Intercounty Connector with Montgomery County, interstates I-95 and I-495, the Washington-Baltimore Parkway, and I-295 linking with the District of Columbia and Northern Virginia. The county also has a considerable mass transit infrastructure with 15 Metro stations found across the Blue, Orange, and Green lines as well as an AMTRAK station and MARC stations.

Despite these many advantages, Prince George's County has not experienced substantial TOD around its 15 Metro stations, as compared to neighboring jurisdictions in Montgomery County and Virginia. More typical for Prince George's County is the location of its commercial real estate built in traditional office and industrial parks, many of which are not near Metro stations, and offer few amenities and housing options. As regional development patterns evolve, resident/employer preferences continue to increasingly choose vibrant, mixed-use environments for places to live and work.

This is a considerable disadvantage for Prince George's County at a time when a locality's competitiveness for growth depends on its ability to generate, attract, and retain companies and talent and to create physical environments that facilitate more "live-work-play" interactions. Not surprisingly, regions across the nation are advancing development complexes as key components in creating the physical environments that can generate, attract, and retain companies and talent. One example is the new wave of strategically planned "mixed-use" campus expansions that are taking place across major research universities in urban settings. Communities from Raleigh, Seattle, Portland (Oregon), New York City, Denver, Chicago, and San Francisco are engaged in these significant, new mixed-use campus expansions for their leading research universities.

Build upon key strengths:

- Availability and affordability of commercial real estate as well as lower cost of land and many sites for development.
- Central location and extensive road network and mass transit infrastructure.

Address key weakness:

- Lack of TODs and walkable "live-work-play" places
- Difficult development process with overly burdensome and process-oriented local development ordinances
- Real and perceived quality of life concerns

In the Washington, D.C. region, mixed-use developments are also on the rise and have become premier locations for industry, amenities, and housing. For instance, in Montgomery County there are several significant mixed-use developments, including downtown Bethesda, downtown Rockville, and the area around White Flint. In Virginia, beyond established developments in Crystal City, Ballston, and Alexandria, there is soon to be a significant town center with Metro access developed at Tyson's Corner, already one of the region's most significant developments.



Going forward, there are important implications from the target industry clusters identified in this strategy that relate to place-based development approaches in Prince George's County. While not all of the target industry clusters are well-suited for broad real estate development across the county, as a combined set of industry targets, they do offer opportunities for broad-based development efforts. More specifically:

- Federal Government and Business Services-targeted industry clusters offer the broadest place-based development opportunities with a focus on more high quality TOD sites.
- The Healthcare and Life Sciences-targeted industry cluster is best suited to be advanced near specific institutional drivers, particularly if the planned UMMS hospital complex development in the county goes forward. Locating this complex near a Metro station would bring additional benefits.
- The Information, Communications, and Electronics-targeted industry cluster is best suited to be located close to UMCP in a mixed-use campus development complex to take advantage of the research, innovation, and talent generation found at the campus.

PROPOSED ACTIONS:

Three specific actions are being proposed to advance the economic development priority of establishing competitive places for development in Prince George's County, including:

- Create a "priority approvals process" or "by right zoning" for a set of targeted development sites associated with TOD, UMMS, etc., that vastly streamlines the approval processes.
- Make the build out of M Square as a "live-work-play" location a top county economic development priority.
- Examine the establishment of pre-packaged development tools for TOD such as a pre-designated TIF (tax increment financing), creation of BIDs (business improvement districts), and targeted industry incentives (e.g., real estate tax abatements for targeted tenants, use of grants and/or loans).

LAUNCH PRO-ACTIVE OUTREACH MARKETING AND RAISE QUALITY OF LIFE

STRATEGIC NEED FOR PRINCE GEORGE'S COUNTY

While growing existing businesses and fostering new start-ups must be priorities for Prince George's County in its targeted industry cluster activities, there is also a significant opportunity for attracting businesses into the county. Prince George's County is situated in one of the most economically robust regions of the nation, which has outperformed the national economy consistently over the past ten years in both periods of economic expansion and economic downturn. This strong regional performance is also found in the targeted industry clusters.

Yet, a close examination of the business development in Prince George's County suggests a major challenge in persuading business establishments in the region to consider the county as a place to do business. Prince George's County is still losing more jobs to business establishments moving out of the county than they are gaining from the companies that are moving into the county. From 2001 to 2009, for every 1 job gained from business establishments in primary industries moving into the county, Prince George's County lost 1.1 jobs from existing business establishments moving out of the count. This suggests that Prince George's County has not been convincing its existing business establishments, and those businesses outside of the county, to consider the county as a place to expand.

One factor negatively impacting the ability of Prince George's County to compete for existing business retention and attraction is the previously noted lack of transportation-oriented development sites around the county's 15 Metro stations, able to offer vibrant, mixed-use environments for places to live and work.

Also, concerns about quality of life remain an issue for Prince George's County, and negatively impact business attraction and retention. Reducing crime and improving schools are particularly important quality of life issues for Prince George's County since it performs poorly in its crime rate and K-12 academic performance compared to competing suburban counties in the Washington, D.C.- Baltimore region.

Build upon key strengths:

- Existing businesses have a more positive perception of business climate than across Maryland.

Address key weakness:

- Quality of life concerns relative to region colors public perception.
- Lack of identity and brand.

PROPOSED ACTIONS:

Two specific actions are being proposed to advance the launch of pro-active outreach marketing for Prince George's County:

- Create a pro-active marketing and branding campaign.
- Develop an "alliance marketing" outreach approach for each targeted industry cluster.

FROM STRATEGY TO ACTION PLAN

The full action plan for the two-prong strategic approach is presented below. It includes details on the level of resources required, time frame for implementation, and lead organizations to move the actions forward.

There are 16 specific actions called for in this comprehensive and targeted strategic economic development plan, requiring between \$1.15 million to \$1.7 million in increased county economic development funding when fully implemented. This will also require a one-time \$500,000 investment to develop a branding campaign that builds upon the current county branding study. Many of the actions do not call for new resources, but seek to prioritize or reallocate existing economic development resources in support of the targeted industry clusters and crosscutting initiatives.

While this is a considerable sum, it is important to recognize that it is an investment that will generate increased tax revenues from heightened business development and job growth in Prince George's County. In addition, many of the efforts can be phased in over time so that the targeted industry cluster development and crosscutting priority actions can demonstrate results, which in turn will help to secure additional funding for more long-term initiatives based on the early success.

Given the critical nature of this effort, most of the actions should be implemented in the next two years. In fact, the proposed action, to put in place dedicated staff support for industry cluster development, has already been implemented by the Prince George's County Economic Development Corporation. There is one longer-term proposed action to advance a new intermediary organization for technology commercialization and entrepreneurial development, which may take three to five years to fully implement. If done well, this can be a transformative activity that will pay dividends for decades, similar to the impact of San Diego CONNECT.

The implementation plan outlined in Table ES-2 illustrates how the 16 actions can work to revitalize the economy of Prince George's County and put it on a path to fully participate in the broader regional growth found in the Washington, D.C.-Baltimore region.



Table ES-2: Summary of Implementation Plan

Strategy Components	Initiatives	Action	Time Frame ⁷	County Resources Required	Lead Organization
Strategy Component I: Development Strategies for the Targeted Industry Clusters in Prince George's County	Implement Tailored Industry Cluster Development Strategies For The Four Identified Industry Clusters	Federal Government Cluster	Immediate to Long-term	Supported through other actions.	Prince George's County Economic Development Corporation
		Business Services Cluster	Immediate to Long-term	Supported through other actions.	Prince George's County Economic Development Corporation
		Healthcare and Life Sciences Cluster	Immediate to Long-term	Supported through other actions.	Prince George's County Economic Development Corporation
		Information, Communications and Electronics Technology Cluster	Immediate to Long-term	Supported through other actions.	Prince George's County Economic Development Corporation
	Organizing Economic Development Resources to Support Targeted Industry Clusters	Dedicate Staff Support for Industry Cluster Development and Networking	Immediate	Already implemented, so no additional resources required	Prince George's County Economic Development Corporation
		Prioritize County Incentives to Targeted Industry Clusters	Immediate	No new resources.	Prince George's County Executives Office
		Focus on Workforce Connections to Targeted Industry Clusters	Near-term	\$150,000 annually for skill centers, plus \$100,000 to \$200,000 for industry experiential coordinator and support services	Prince George's County Economic Development Corporation and Prince George's County Public Schools

⁷ Immediate refers to within the current fiscal year; Near Term is generally in the next 1-2 years; Longer term is 2–5 years out. Immediate to Long-term reflects a more complex action that can be partially implemented in the near term, but will require a longer time period to be fully implemented.

Strategy Components	Initiatives	Action	Time Frame ⁷	County Resources Required	Lead Organization
Strategy Component II: Development Strategies for Crosscutting Economic Priorities	Promote Entrepreneurship, Talent and Innovation Collaborations	Creating a Prince George's County Innovation and Commercialization Collaborative	Long-term	\$300,000 to \$500,000 annually	Prince George's County Economic Development Corporation
		Establish Financing Approaches for High Growth Potential Emerging Technology Companies	Immediate	No new resources	Prince George's County Economic Development Corporation Prince George's County Financial Services Corporation First
		Advance and Link Talent and Innovation Activities with Local Minority Business Enterprise Development	Near-term	\$250,000 annually	Supplier Development and Diversity Division of the Prince George's County Government
		Promote Talent Bridges to Connect Companies in Targeted Industry Clusters with Top Talent Being Generated or Attracted by Universities and Federal Labs in the county	Near-term	\$150,000 to \$300,000 for the internship grant program \$200,000 to \$300,000 for the fellowship grant program	Prince George's County Economic Development Corporation
	Establish Competitive Places for Development	Create a "By Right Zoning" for a set of targeted development sites associated with Transit-oriented development	Immediate	No new resources	Prince George's County Council and Planning Department
		Make the Build Out of M Square as a Mixed-Use Campus Development a Top County Economic Development Priority	Near-term	No new resources	Prince George's Development Corporation, Prince George's Planning Department, UMCP
		Continue to Examine Feasibility and Advance New Development Tools	Immediate	No new resources	Prince George's County Executive's Office, Department of Housing and Community Development, Redevelopment Authority and Planning Department

Strategy Components	Initiatives	Action	Time Frame ⁷	County Resources Required	Lead Organization
Strategy Component II: Development Strategies for Crosscutting Economic Priorities	Launch Pro-Active Outreach Marketing	Implement a Branding Campaign	Near-term	\$500,000 one time funding	Coalition of Prince George's County business groups, Conference and Visitors Bureau, and Prince George's County Economic Development Corporation
		Develop an Alliance Marketing Approach for Each Targeted Industry Cluster	Immediate	No new funding	Prince George's County Economic Development Corporation

PRINCE GEORGE'S COUNTY TARGETED ECONOMIC DEVELOPMENT STRATEGIC PLAN STEERING COMMITTEE

PROJECT STEERING COMMITTEE

Derick P. Berlage

Chief, Countywide Planning Division
M-NCPPC, Prince George's County Planning Department

Eric C. Brown

Director
Prince George's County Department of Housing and Community Development

Jackie W. Brown

Committee Director
Prince George's County Council
Planning, Zoning and Economic Development (PZED) Committee

The Honorable Derrick Leon Davis

Councilmember
Prince George's County Council, District 6

David S. Iannucci

Assistant Deputy Chief Administrative Officer
Prince George's County Office of the County Executive

Gwen S. McCall

President/Chief Executive Officer
Prince George's County Economic Development Corporation

Aubrey D. Thagard

Assistant Deputy Chief Administrative Officer
Prince George's County Office of the County Executive

Jacqueline Philson

Project Manager, Countywide Planning Division
M-NCPPC, Prince George's County Planning Department

PROJECT ADVISORY COMMITTEE AND OTHER STAKEHOLDERS

Timothy Adams

President and CEO

Systems Application Technologies, Incorporated Chairman,
Prince George's County Business Roundtable Board of Directors

Vanessa Akins-Mosely

Chief, Strategy and Implementation

M-NCPPC Prince George's County Planning Department

Ollie P. Anderson Jr.

President, Anderson International, LLC

Secretary, Executive Committee

Prince George's County Economic Development Corporation Board

Michael Asante

Planner Coordinator, Countywide Planning Division, Special Projects

M-NCPPC, Prince George's County Planning Department

Christine Barrow, Ph.D.

Dean, Sciences, Tech Engineering and Math

Prince George's Community College

BioPharma Task Force, PGCC Representative

Laurie A. Baty

Deputy Director

NCRTV Museum

Chalita Brandly *(former employee)*

Senior Planner (Project Coordinator)

Countywide Planning Division, Research

M-NCPPC Prince George's County Planning Department

Judy Britz, Ph.D.

Executive Director, Biotechnology

Maryland Department of Business and Economic Development

BioPharma Task Force

Jacqueline L. Brown, Ph.D.

Director, Community and Government Affairs

Prince George's Community College

Carl E. Brown, Jr.

Executive Director

Center for Minority Business Development
Prince George's Community College

Marva Jo Camp, Esq.

MJ Camp and Associates

Vice-Chair, Executive Committee

Prince George's County Economic Development Corporation Board
BioPharma Task Force
Leadership Prince George's, Inc.

Mark A. Coles

Business and Legislative Representative

Washington Building and Construction Council

Prince George's County Economic Development Corporation Board

Lynne Cooper

Site Location Consultant, facility LOGIX

BioPharma Task Force

Alma Cravins-Essex

President

Applied Quality Communications

Prince George's County Economic Development Corporation Board

Brian Darmody

Associate Vice President, Research and Economic Development

University of Maryland

Tanya Diggs

Administrator, Procurement and Finance

Prince George's County Redevelopment Authority

Albert G. Dobbins, III, AICP

Deputy Planning Director

M-NCPPC Prince George's County Planning Department

Charles A. Duke

Chairman, Executive Committee

W.F. Chesley Real Estate, Incorporated

Prince George's County Economic Development Corporation Board

Linda Ellerton

Business Development Specialist, MD Biotech Center
Maryland Department of Business and Economic Development
BioPharma Task Force, DEED Representative

James (Jim) R. Estepp

Director of Operations
Greater Prince George's Business Roundtable/Andrews Business and Community Alliance

M. H. Jim Estepp

President and CEO
Greater Prince George's Business Roundtable/Andrews Business and Community Alliance

Conni Evans

President
The Ancon Group, LLC
Prince George's County Economic Development Corporation Board

Sonja Ewing

Planner Coordinator, General Plan Team
M-NCPPC Prince George's County Planning Department

Pradeep Ganguly

Executive Vice President
Prince George's County Economic Development Corporation

Kelly W. Garisto

Vice President
TD Bank

Danielle Glaros

The Office of Councilmember Eric Olson
Prince George's County Council, District 3

Thomas H. Graham

President, Pepco Region
PEPCO
Prince George's County Economic Development Corporation Board

Jason L. Groves, Esq.

Chair, Executive Committee

Prince George's County Economic Development Corporation Board

Executive Vice President and General Counsel, Medifast

Jamie Gunnell

Special Assistant to the President and CEO

Prince George's County Economic Development Corporation

Dr. Emma Hadley

Executive Director

Charis Center for the Arts

Artis Hampshire-Cowan

Senior Vice President and Secretary

Howard University

BioPharma Task Force

David Harrington

President and CEO

Prince George's County Chamber of Commerce

Melvin C. High

Sheriff

Prince George's County Office of the Sheriff

Prince George's County Economic Development Corporation Board

E. Frank Hodal Jr.

President and CEO

Little Calumet Holdings, LLC

BioPharma Task Force

Bernard Holloway

Analyst

Prince George's CountyStat, Economic Development

Diana Jackson

Business Development Specialist

Prince George's County Economic Development Corporation,

Business Development, Retention and Expansion

Tristian Johnson

The Office of Councilmember Andrea Harrison
Prince George's County Council, District 5

Nellvenia (Nell) Johnson

The Office of Councilmember Derrick Davis
Prince George's County Council, District 6

Michelle Johnson

Owner
Painted Faces Inc

Roland L. Jones

Executive Director
Prince George's County Office of Central Services
Supplier Development and Diversity Division

Stephen Jordan, Ph.D.

Bowie State University

Emmett V. Jordan

Mayor Pro Tem
City of Greenbelt Maryland

John Henry King

Economic Development Director
City of Bowie Maryland

Ted Kowaluk

Senior Planner, Countywide Planning Division, Special Projects
M-NCPPC, Prince George's County Planning Department

Dr. Mukesh Kumar, Sr.

Director, Regulatory Affairs Amarex Clinical Research
BioPharma Task Force, Industry Representative

Raymond D. Lambert, Sr.

Treasurer, Executive Committee
Prince George's County Economic Development Corporation Board
Regional Sales Manager, Retail Administration Banking Group at M&T Bank

Patricia L. Larrabee

*President, Facility Logix
BioPharma Task Force, Site Location Consultant*

Brendon Laster

*The Office of Councilmember Mel Franklin
Prince George’s County Council, District 9*

Ivy Lewis

*Chief, Community Planning Division
M-NCPPC, Prince George’s County Planning Department*

David Lewis

*Program Manager
DBED, Office of Strategic Initiatives, Maryland Department of
Business and Economic Development
BioPharma Task Force, Tax Incentives Expert*

Dr. Irv McConnell

*President
The McConnell Group
BioPharma, Task Force, Industry Representative*

Kierre McCune

*Planner Coordinator, General Plan Team
M-NCPPC Prince George’s County Planning Department*

Roberta Melton

*Director, Entrepreneurial Innovation
Prince George’s County Economic Development Corporation
BioPharma Task Force*

Gary W. Michael

*Managing Director
NAI Michael Commercial Real Estate Services
Prince George’s County Economic Development Corporation Board*

Dwayne Mingo

*The Office of Councilmember Karen R. Toles
Prince George’s County Council, District 7*

Rama Modali

President, Bioserve

Craig M. Muckle

*Manager, Public Affairs and Governmental Relations
Safeway, Incorporated*

J. Matthew Neitzey

*Executive Director, Prince George's County Conference & Visitors Bureau
Prince George's County Economic Development Corporation Board*

Jennie Nevin

*Analyst
Prince George's CountyStat, Economic Development*

Adam Ortiz

*Acting Director
Prince George's County Department of Environmental Resources*

Altmann Pannell

*The Office of Councilmember Ingrid M. Turner
Prince George's County Council, District 4*

Christine Patterson

*Controller, Chief of Finance
Prince George's County Revenue Authority*

Jon Peterson

*Senior Vice President, Commercial Development
The Peterson Companies
Prince George's County Economic Development Corporation Board*

Wanda L. Plumber

*Director, Business Development
Prince George's County Economic Development Corporation*

Abba Polangin, AIA, AICP

*A|P Architects
Greater Bowie Chamber of Commerce Board Member*

Jim Poulos

Technology Transfer Coordinator
USDA Beltsville Agricultural Research Center
BioPharma Task Force, BARC Representative

Eddie L. Pounds, Esq.

General Counsel
Prince George's County Economic Development Corporation

Carla Maxwell Ray

Director, Strategic Partnerships & External Relations at Vitamin Angels
Prince George's County Economic Development Corporation Board

George Redmond

Prince George's County Resident

Carla A. Reid

Deputy Chief Administrative Officer
Economic Development and Public Infrastructure
Prince George's County Office of the County Executive

Kipling Reynolds

Planning Supervisor, General Plan Team
M-NCPPC Prince George's County Planning Department

Bradford L. Seamon

Chief Administrative Officer
Prince George's County Office of the County Executive

Bill Shipp

Managing Director
O'Malley, Miles, Nylan and Gilmore, P.A.

Sylvia M. Syphax

Project Manager
Renaissance Medical Group, Incorporated
Prince George's County Economic Development Corporation Board

Deborah Scott Thomas

Owner, Data Solutions & Technology Incorporated
Prince George's County Economic Development Corporation Board

John Peter Thompson

Chairman, NARA-B
BioPharma Task Force, Resource Person

Walt Townsend

President/CEO
Baltimore Washington Chamber of Commerce

Gwen Vaccaro, RN

The Pleasant Touch
BioPharma Task Force, Greenbelt CDC

David M. Valderrama

Valderrama America
Prince George's County Economic Development Corporation Board

Gayatri Varma, Ph.D.

Executive Director, Office of Technology Commercialization
University of Maryland

Marsha Voigt

BioPharma Task Force, Greenbelt CDC

Bridgette Warren

The Office of Councilmember Mary A. Lehman
Prince George's County Council, District 1

Alonzo Washington

The Office of Councilmember Will Campos
Prince George's County Council, District 2

Sangrea Watkins

Executive Assistant
Prince George's County Economic Development Corporation
BioPharma Task Force, Staff

Ellis F. Watson

The Office of Councilmember Obie Patterson
Prince George's County Council, District 8

Howard Ways III

Executive Director
Prince George's County Redevelopment Authority

Patricia White

Executive Director
Prince George's County Economic Development Corporation,
Workforce Services Division

Floyd E. Wilson, Jr.

Minority Business Development Consultant
Prince George's County Economic Development Corporation Board

**Organizational titles are for identification only.*

ACKNOWLEDGEMENTS

The Targeted Economic Development Strategic Plan for Prince George’s County reflects the input from economic development officials and staff, government leaders and elected officials, business organizations and the consultant team led by the Battelle Technology Partnership Practice, with the Jacob France Institute and Green Door Advisors.

THE ECONOMIC DEVELOPMENT STRATEGIC PLAN STEERING COMMITTEE ACTIVELY GUIDED THE DEVELOPMENT OF THIS PLAN

David S. Iannucci, Assistant Deputy Chief Administrative Officer
Office of the County Executive

Gwen S. McCall, President/Chief Executive Officer
Prince George’s County Economic Development Corporation

Aubrey Thagard, Assistant Deputy Chief Administrative Officer
Office of the County Executive

The Honorable Derrick L. Davis, Councilmember (District 6)
Prince George’s County Council

Jackie W. Brown, Committee Director
Prince George’s County Council
Planning, Zoning and Economic Development (PZED) Committee

Eric Brown, Director
Prince George’s County Department of Housing and Community Development

Derick P. Berlage, AICP, Division Chief
M-NCPPC, Prince George’s County Planning Department, Countywide Planning

Jacqueline E. Philson, Project Manager and Facilitator
M-NCPPC, Prince George’s County Planning Department, Countywide Planning

SPECIAL RECOGNITION AND APPRECIATION IS EXTENDED TO:

Battelle Technology Partnership Practice
Mitchell Horowitz, Vice President and Managing Director
Ryan Helwig, Senior Economic Development Analyst

University of Baltimore’s Jacob France Institute
Richard Clinch, Ph.D., Director of Economic Research

Green Door Advisors
Marisa Gaither-Flowers, Principal
Jon Stover, Analyst

PRINCE GEORGE'S COUNTY OFFICE OF THE COUNTY EXECUTIVE

Rushern L. Baker, III
Prince George's County Executive

Bradford L. Seamon, Chief Administrative Officer

Carla A. Reid, Deputy Chief Administrative Officer for Economic Development
and Public Infrastructure

THE PRINCE GEORGE'S COUNTY COUNCIL

The Honorable Andrea Harrison, Chair
Councilmember, District 5

The Honorable Obie Patterson Vice-Chair
Councilmember, District 8

The Honorable Mary A. Lehman
Councilmember, District 1

The Honorable Will Campos
Councilmember, District 2

The Honorable Eric Olson
Councilmember, District 3

The Honorable Ingrid M. Turner
Councilmember, District 4

The Honorable Derrick Leon Davis
Councilmember, District 6

The Honorable Karen R. Toles
Councilmember, District 7

The Honorable Mel Franklin
Councilmember, District 9

**THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION
PRINCE GEORGE'S COUNTY PLANNING BOARD**

Elizabeth M. Hewlett, Chairman
Dorothy F. Bailey, Vice Chairman
Manuel R. Geraldo
John P. Shoaff
A. Shuanise Washington

**THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION,
PRINCE GEORGE'S COUNTY PLANNING DEPARTMENT**

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Derick P. Berlage, AICP, Chief
Countywide Planning Division

Ivy Lewis, AICP, Chief
Community Planning Division

Vanessa Akins-Mosely, Chief
Strategy and Implementation

PROJECT TEAM

The Maryland-National Capital Park and Planning Commission,
Prince George's County Planning Department

COUNTYWIDE PLANNING DIVISION

Derick P. Berlage, AICP, Chief

Jacqueline Philson, Project Facilitator and Manager

Chalita Brandly, Project Coordinator (*former employee*)

Michael Asante, Ph.D., Planner Coordinator

Ted Kowaluk, Senior Planner

Brenda Spears-Travis, Senior Administrative Assistant

OFFICE OF THE PLANNING DIRECTOR

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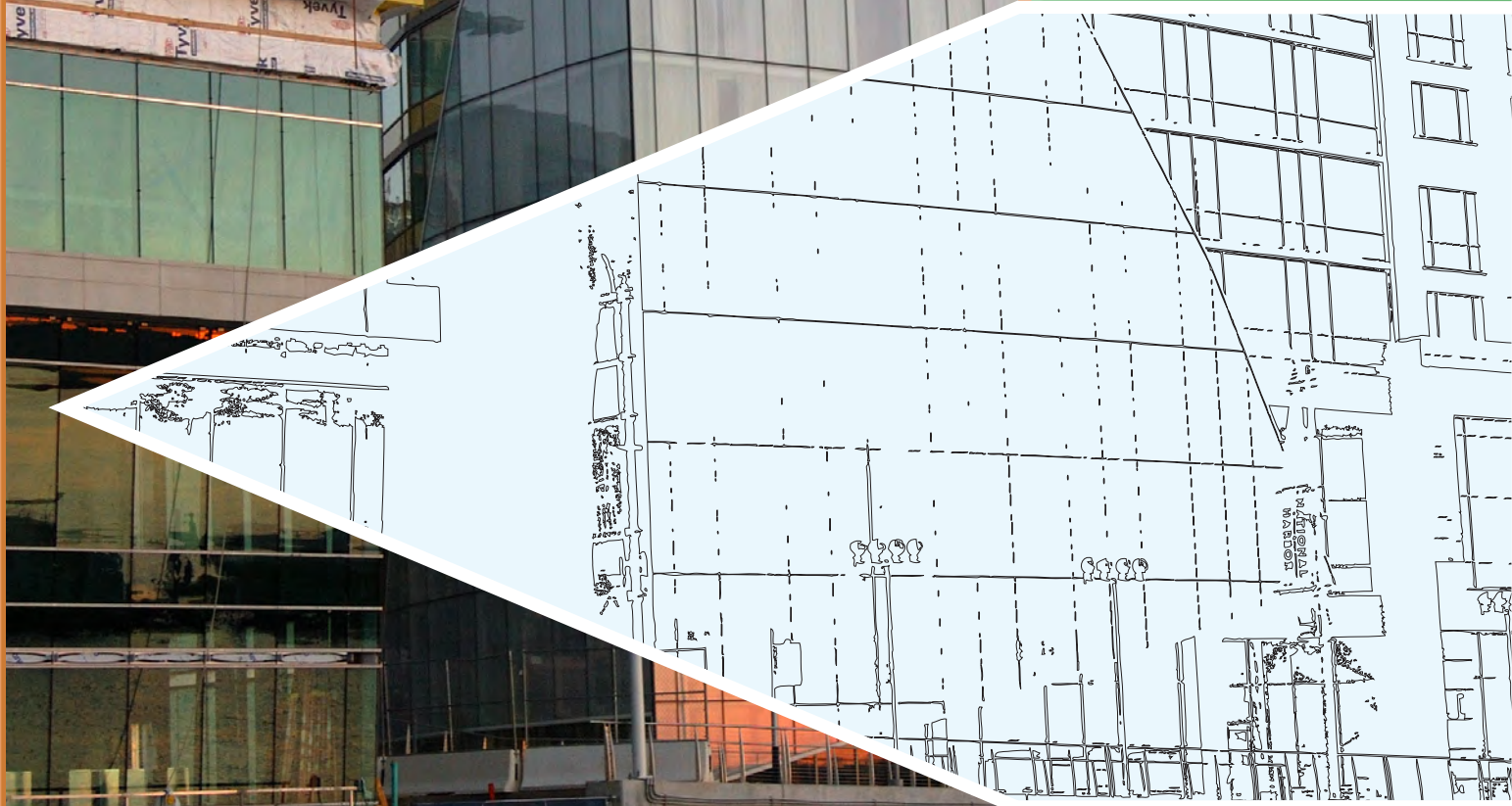
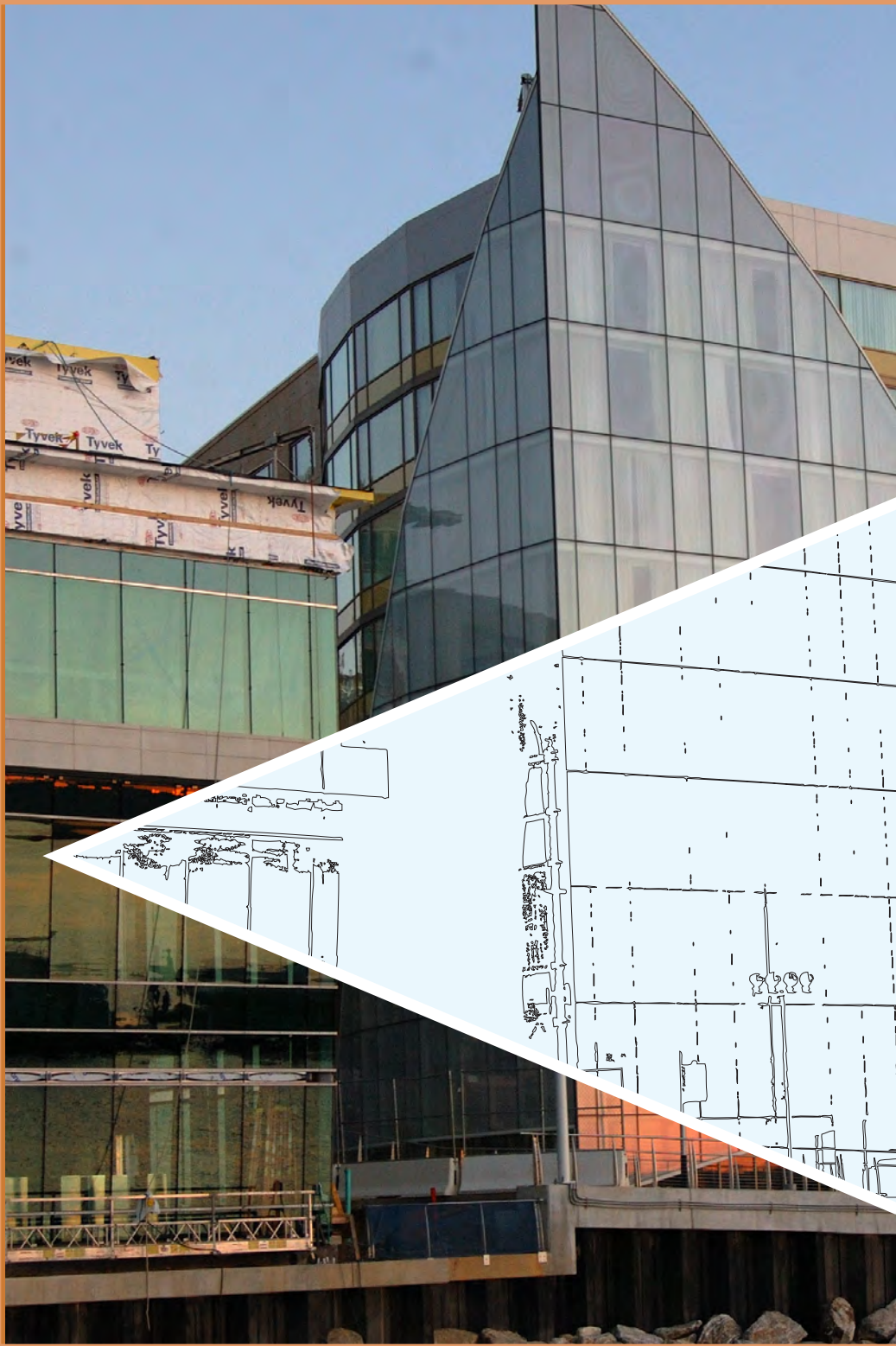
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