

Appendix E: Return on Investment

This evaluation is a preliminary estimate of the economic impacts associated with implementing the *Management Plan* for the Civil War Heritage Area. The implementation strategies in this plan focus heavily on interpretation, packaging, and marketing, and reinforcing planning programs that are already in place, rather than major capital investments. This approach provides a host of benefits including increased pride of place among residents, and an enhanced visitor experience that will improve the overall quality and reputation of the region as a visitor destination, that will in turn increase visitation. However, these benefits are more difficult to quantify compared to quantifying the economic return on new capital projects. Assessing the return on investment for Maryland's Civil War Heritage Area is further complicated by the state's significant investment in marketing and visitor infrastructure for the Civil War Trails program, as this program promises to affect the return on investments made by the Civil War Heritage Area.

With these considerations in mind, an estimate was developed regarding the increase in visitation, visitor expenditures, economic impacts, and employment in the Civil War Heritage Area. Following are the findings of the analysis.

Visitation

There is limited data available to assess how other Maryland heritage areas and Civil War trail initiatives have affected visitation levels, which could lend guidance to determining visitation impacts for Maryland's Civil War Heritage Area. This is to be expected since heritage areas offer a combination of visitor experiences across a vast landscape (a pretty drive, a tour of an NPS battlefield, dinner at a charming local restaurant, etc.), rather than just a discreet experience that can be easily tracked (e.g., a visit to an amusement park). Among the available statistics, the Maryland Heritage Areas Program reports that visitation at Maryland's Canal Place Heritage Area has grown on average by nine percent annually since 1997.

In Virginia, reportedly an estimated 80,000 people tour the Virginia Civil War Trails each year (the trail program began in 1994). Visitor statistics at National Park Service Sites along the Virginia trail routes present a mixed picture: since 1996 visitation at Richmond National Battlefield has grown an average of five percent annually, while Fredericksburg & Spotsylvania NMP, Petersburg NB, and Manassas have remained essentially stable with less than 1 percent average annual growth. Anecdotal information suggests that the smaller, lesser known sites have seen significant increases in visitation as compared to the larger, more well-known NPS sites.

Also worth noting, the Maryland Office of Tourism reports that 70,000 brochures for the Antietam Campaign Civil War Trail have been distributed to interested travelers since opening the trail in fall of 2002, exhausting the available print supply.

Bearing this information in mind, an estimate of increased visitation was developed based on TravelScope data commissioned by the Maryland Office of Tourism. TravelScope data is generally considered by tourism industry officials to be a conservative accounting of tourism statistics. According to TravelScope the current estimated annual visitation in the Civil War Heritage Area totals 1.3 million person trips. Subtracting out business related travel, the qualified travel market totals 1.1 million person trips. This includes people who are traveling for pleasure or for personal/other reasons, and represents both daytrip and overnight travel by visitors who travel fifty miles or more from home. As shown in the table below, it is estimated that the implementation of the heritage area *Management Plan* will result in a six percent

increase in participation in heritage related activities. This translates into an additional 66,445 person trips each year.

Increase in Visitation to the Civil War Heritage Area

| | | Carroll | Frederick | Washington | Civil War Heritage Area Total |
|--|--------------|---------------|---------------|---------------|----------------------------------|
| Existing Qualified Visitation (person trips) | ¹ | 165,066 | 429,404 | 505,878 | 1,100,348 |
| Current Participation in Heritage Activities | ² | 8.2% | 39.3% | 36.4% | 33.6% |
| Growth in Participation in Heritage Activities | | 8% | 5% | 7% | 6% |
| Increased Visitation (person trips) | | 12,875 | 20,182 | 33,388 | 66,445 |

Sources: Maryland Office of Tourism Development, and Economics Research Associates

¹ TravelScope data provided by MOTD. Qualified visitors include those traveling for pleasure or personal/other reasons, and excludes business travelers.

² Activities include visits to Cultural Events/Festivals, Historic Sites/Museums, and National/State Parks

Visitor Spending Impacts

The assessment of visitor spending impacts includes both direct and indirect impacts for the region. The estimate of direct impacts is based on increased visitor spending on entertainment, lodging, food and retail sales, and transportation. Additional economic returns in the form of state and county tax revenues, and job creation are estimated as well.

Current average household trip expenditures for the three-county area range from \$107 to \$250, and the statewide average household trip expenditure for 2002 was \$334. A 1999 study of heritage tourism in Pennsylvania found that a heritage visitor typically spends \$107 per day (approximately \$353 per trip). According to D. K. Shifflet, in the nearby Gettysburg/Hershey/York tourism region visitors spend an average of \$91 per person per day (with a 3.0 day average length of stay this translates into \$273 per trip). As illustrated in the table below, by applying an average household trip expenditure of \$275 across all three counties, it can be expected that Maryland's Civil War Heritage Area initiative will generate an additional \$9.1 million in visitor expenditures.

Net New Visitor Expenditures

| | | Carroll | Frederick | Washington | Civil War Heritage Area Total |
|--|--------------|--------------------|--------------------|--------------------|-------------------------------------|
| Increased Visitation (person trips) | | 12,875 | 20,182 | 33,388 | 66,445 |
| Average HH Trip Expenditure | ¹ | \$275 | \$275 | \$275 | \$275 |
| Average HH Travel Party Size | ¹ | 2.0 | 2.0 | 2.0 | 2.0 |
| Average Per Capita Trip Expenditure | | \$138 | \$138 | \$138 | \$138 |
| Increased Visitor Spending | | \$1,770,333 | \$2,775,022 | \$4,590,846 | \$9,136,201 |

Sources: Maryland Office of Tourism Development, and Economics Research Associates

¹ TravelScope data provided by MOTD. Qualified visitors include those traveling for pleasure or personal/other reasons, and excludes

Assuming that \$80,350 in new visitor spending is required to support one additional job (per the Maryland Office of Tourism Development), there will be an additional 114 jobs created in the region by the heritage initiative.

Employment Growth

| Civil War Heritage Area | |
|---|-------------|
| New Visitor Spending | \$9,136,201 |
| New Visitor Spending Per Job ¹ | \$80,350 |
| Employment Growth | 114 |

¹ Maryland Office of Tourism Development

Sources: Maryland Office of Tourism Development; Economics Research Associates

This economic activity will result in increases in sales tax, lodging tax, and income tax revenues. The following table illustrates the annual tax revenues that the Civil War Heritage Area is expected to generate. It should be noted that the return on investment could be higher if tax mechanisms were in place at the local level (e.g., Carroll and Frederick Counties have no lodging tax). All together, the heritage region will receive an estimated \$90,695 in annual local tax benefits and the state will receive \$166,742 in new tax revenues per year. This results in a total of \$257,436 in new tax revenues per year.

Net New Tax Revenues

| Net New Visitor Expenditures by Spending Category | | Carroll | Frederick | Washington | Civil War Heritage Area Total |
|---|--------------------|--------------------|--------------------|--------------------|-------------------------------|
| General Retail & Trade | ¹ 24.0% | \$141,627 | \$222,002 | \$367,268 | \$730,896 |
| Entertainment & Recreation | 12.0% | \$70,813 | \$111,001 | \$183,634 | \$365,448 |
| Food Service | 26.0% | \$153,429 | \$240,502 | \$397,873 | \$791,804 |
| Lodging | 18.0% | \$106,220 | \$166,501 | \$275,451 | \$548,172 |
| Transportation | 10.0% | \$59,011 | \$92,501 | \$153,028 | \$304,540 |
| Miscellaneous | 10.0% | \$59,011 | \$92,501 | \$153,028 | \$304,540 |
| Net New Visitor Spending | 100.0% | \$1,770,333 | \$2,775,022 | \$4,590,846 | \$9,136,201 |

| | | | | |
|---|------------------|------------------|--------------------|--------------------|
| New Visitor Spending Per Job | \$80,350 | \$80,350 | \$80,350 | \$80,350 |
| Employment Growth | 22 | 35 | 57 | 114 |
| Average Annual Wages of Visitor Supported Jobs ² | \$23,829 | \$25,404 | \$20,062 | - |
| Taxable Wages | \$525,019 | \$877,370 | \$1,146,255 | \$2,548,643 |

| TAX REVENUES | | | | | |
|--|-------|-----------------|-----------------|------------------|------------------|
| State Income Tax | 4.75% | \$24,938 | \$41,675 | \$54,447 | \$121,061 |
| State Sales Tax | 5.0% | \$8,852 | \$13,875 | \$22,954 | \$45,681 |
| Total State Tax Revenues | | \$33,790 | \$55,550 | \$77,401 | \$166,742 |
| Local Income Tax | | 2.63% | 2.96% | 2.80% | - |
| Local Lodging Tax | | 0.00% | 0.00% | 6.00% | - |
| Local Admissions/Amusement Tax | | 10.00% | 0.50% | 5.00% | - |
| Local Income Tax Revenue | | \$13,808 | \$25,970 | \$32,095 | \$71,873 |
| Local Lodging Tax Revenue | | \$0 | \$0 | \$2,003 | \$2,003 |
| Local Admissions/Amusement Tax Revenue | | \$7,081 | \$555 | \$9,182 | \$16,818 |
| Total Local Tax Revenue | | \$20,889 | \$26,525 | \$43,280 | \$90,695 |
| Total Additional Tax Revenues | | \$54,679 | \$82,075 | \$120,681 | \$257,436 |

¹ Expenditure patterns from the Pennsylvania Heritage Tourism Study, May 1999, prepared by D.K. Shifflet & Associates

² U.S. Census Bureau, 1999 per capita income by county

Sources: Maryland Office of Tourism Development; Pennsylvania Heritage Tourism Program; U.S. Census Bureau; Economics Research Associates

Summary of Return on Investment

| | Carroll | Frederick | Washington | Civil War Heritage Area Total |
|--------------------------------------|-----------------|------------------|-------------------|--|
| Increased Visits (person trips) | 12,875 | 20,182 | 33,388 | 66,445 |
| Visitor Expenditures | \$1,770,333 | \$2,775,022 | \$4,590,846 | \$9,136,201 |
| Employment | 22 | 35 | 57 | 114 |
| Economic Impact - State | \$33,790 | \$55,550 | \$77,401 | \$166,742 |
| Economic Impact - Local | \$20,889 | \$26,525 | \$43,280 | \$90,695 |
| Total Additional Tax Revenues | \$54,679 | \$82,075 | \$120,681 | \$257,436 |

Source: Economics Research Associates

Hagerstown TIZ Baseline Data

Source: U.S. Census Bureau, 2001 County Business Patterns

21740

Number of establishments: 1,818
 Number of employees: 32,564
 First quarter payroll in \$1,000: 227,229
 Annual payroll in \$1,000: 929,270

Number of Establishments by Employment-size class

| Industry Code Description | Total | 1-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100- | 250- | 500- | 1000 or |
|--|-------------|------------|------------|------------|------------|-----------|-----------|----------|----------|----------|
| | Estabs | | | | | | 249 | 499 | 999 | more |
| Total | 1818 | 768 | 421 | 316 | 196 | 61 | 44 | 8 | 2 | 2 |
| Forestry, fishing, hunting, and agriculture | 2 | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| Mining | 1 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| Utilities | 3 | 1 | 0 | 0 | 1 | 0 | 1 | 0 | 0 | 0 |
| Construction | 155 | 86 | 17 | 26 | 20 | 4 | 2 | 0 | 0 | 0 |
| Manufacturing | 81 | 24 | 8 | 19 | 9 | 10 | 7 | 2 | 1 | 1 |
| Wholesale trade | 84 | 28 | 22 | 21 | 10 | 2 | 1 | 0 | 0 | 0 |
| Retail trade | 432 | 131 | 141 | 93 | 42 | 11 | 13 | 0 | 1 | 0 |
| Transportation & warehousing | 45 | 19 | 6 | 9 | 6 | 2 | 2 | 1 | 0 | 0 |
| Information | 24 | 6 | 8 | 2 | 1 | 5 | 1 | 1 | 0 | 0 |
| Finance & insurance | 110 | 41 | 48 | 14 | 3 | 2 | 1 | 0 | 0 | 1 |
| Real estate & rental & leasing | 48 | 32 | 9 | 6 | 1 | 0 | 0 | 0 | 0 | 0 |
| Professional, scientific & technical services | 120 | 80 | 17 | 15 | 8 | 0 | 0 | 0 | 0 | 0 |
| Management of companies & enterprises | 11 | 2 | 4 | 2 | 1 | 2 | 0 | 0 | 0 | 0 |
| Admin, support, waste mgt, remediation services | 75 | 31 | 9 | 12 | 12 | 4 | 4 | 3 | 0 | 0 |
| Educational services | 12 | 3 | 0 | 4 | 5 | 0 | 0 | 0 | 0 | 0 |
| Health care and social assistance | 206 | 85 | 52 | 34 | 22 | 3 | 9 | 1 | 0 | 0 |
| Arts, entertainment & recreation | 30 | 13 | 7 | 5 | 3 | 2 | 0 | 0 | 0 | 0 |
| Accommodation & food services | 148 | 49 | 19 | 28 | 40 | 10 | 2 | 0 | 0 | 0 |
| Other services (except public administration) | 216 | 128 | 52 | 24 | 10 | 2 | 0 | 0 | 0 | 0 |
| Auxiliaries (exc corporate, subsidiary & regional mgt) | 8 | 2 | 1 | 0 | 2 | 2 | 1 | 0 | 0 | 0 |
| Unclassified establishments | 7 | 6 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

21742

Number of establishments: 564
 Number of employees: 12,267
 First quarter payroll in \$1,000: 85,835
 Annual payroll in \$1,000: 352,077

Number of Establishments by Employment-size class

| Industry Code Description | Total | 1-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100- | 250- | 500- | 1000 or |
|--|------------|------------|------------|-----------|-----------|-----------|----------|----------|----------|----------|
| | Estabs | | | | | | 249 | 499 | 999 | more |
| Total | 564 | 279 | 123 | 74 | 57 | 20 | 8 | 1 | 0 | 2 |
| Construction | 63 | 35 | 20 | 4 | 3 | 1 | 0 | 0 | 0 | 0 |
| Manufacturing | 15 | 8 | 0 | 2 | 1 | 3 | 1 | 0 | 0 | 0 |
| Wholesale trade | 26 | 13 | 5 | 4 | 3 | 1 | 0 | 0 | 0 | 0 |
| Retail trade | 91 | 40 | 29 | 12 | 8 | 0 | 2 | 0 | 0 | 0 |
| Transportation & warehousing | 27 | 10 | 3 | 8 | 6 | 0 | 0 | 0 | 0 | 0 |
| Information | 8 | 5 | 0 | 1 | 1 | 0 | 0 | 1 | 0 | 0 |
| Finance & insurance | 29 | 14 | 9 | 1 | 3 | 0 | 1 | 0 | 0 | 1 |
| Real estate & rental & leasing | 15 | 11 | 2 | 2 | 0 | 0 | 0 | 0 | 0 | 0 |
| Professional, scientific & technical servi | 43 | 28 | 10 | 1 | 3 | 0 | 1 | 0 | 0 | 0 |
| Management of companies & enterprises | 4 | 2 | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| Admin, support, waste mgt, remediation ser | 24 | 13 | 5 | 6 | 0 | 0 | 0 | 0 | 0 | 0 |
| Educational services | 8 | 3 | 0 | 3 | 1 | 1 | 0 | 0 | 0 | 0 |
| Health care and social assistance | 87 | 32 | 14 | 18 | 12 | 7 | 3 | 0 | 0 | 1 |
| Arts, entertainment & recreation | 15 | 8 | 1 | 4 | 0 | 2 | 0 | 0 | 0 | 0 |
| Accommodation & food services | 33 | 12 | 5 | 4 | 8 | 4 | 0 | 0 | 0 | 0 |
| Other services (except public administration) | 68 | 42 | 17 | 3 | 6 | 0 | 0 | 0 | 0 | 0 |
| Auxiliaries (exc corporate, subsidiary & regional mgt) | 4 | 0 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 0 |
| Unclassified establishments | 4 | 3 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Middletown TIZ Baseline Data

Source: U.S. Census Bureau, 2001 County Business Patterns

21769

Number of establishments: 211
 Number of employees: 2,564
 First quarter payroll in \$1,000: 14,875
 Annual payroll in \$1,000: 63,929

Number of Establishments by Employment-size class

| Industry Code Description | Total Estabs | 1-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100-249 | 250-499 | 500-999 | 1000 or more |
|---|--------------|------------|-----------|-----------|-----------|----------|----------|----------|----------|--------------|
| Total | 211 | 131 | 32 | 25 | 16 | 4 | 1 | 1 | 1 | 0 |
| Forestry, fishing, hunting, and agriculture | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Construction | 59 | 33 | 12 | 11 | 2 | 0 | 1 | 0 | 0 | 0 |
| Manufacturing | 4 | 3 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| Wholesale trade | 10 | 7 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Retail trade | 30 | 18 | 4 | 3 | 3 | 2 | 0 | 0 | 0 | 0 |
| Transportation & warehousing | 5 | 2 | 0 | 0 | 3 | 0 | 0 | 0 | 0 | 0 |
| Information | 4 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Finance & insurance | 10 | 4 | 2 | 2 | 1 | 1 | 0 | 0 | 0 | 0 |
| Real estate & rental & leasing | 7 | 7 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Professional, scientific & technical services | 29 | 22 | 4 | 2 | 1 | 0 | 0 | 0 | 0 | 0 |
| Admin, support, waste mgt, remediation ser | 9 | 4 | 2 | 0 | 1 | 0 | 0 | 1 | 1 | 0 |
| Educational services | 2 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Health care and social assistance | 8 | 4 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 0 |
| Arts, entertainment & recreation | 8 | 2 | 1 | 2 | 3 | 0 | 0 | 0 | 0 | 0 |
| Accommodation & food services | 19 | 13 | 2 | 4 | 0 | 0 | 0 | 0 | 0 | 0 |
| Other services (except public administration) | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Unclassified establishments | 5 | 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Taneytown TIZ Baseline Data

Source: U.S. Census Bureau, 2001 County Business Patterns

21787

Number of establishments: 176
 Number of employees: 2,007
 First quarter payroll in \$1,000: 13,526
 Annual payroll in \$1,000: 57,461

Number of Establishments by Employment-size class

| Industry Code Description | Total Estabs | 1-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100-249 | 250-499 | 500-999 | 1000 or more |
|---|--------------|-----------|-----------|-----------|-----------|----------|----------|----------|----------|--------------|
| Total | 176 | 99 | 39 | 15 | 17 | 3 | 2 | 1 | 0 | 0 |
| Forestry, fishing, hunting, and agriculture | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Construction | 40 | 27 | 7 | 3 | 2 | 1 | 0 | 0 | 0 | 0 |
| Manufacturing | 10 | 3 | 1 | 0 | 2 | 1 | 2 | 1 | 0 | 0 |
| Wholesale trade | 7 | 4 | 2 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| Retail trade | 30 | 14 | 6 | 5 | 5 | 0 | 0 | 0 | 0 | 0 |
| Transportation & warehousing | 11 | 8 | 1 | 2 | 0 | 0 | 0 | 0 | 0 | 0 |
| Information | 2 | 1 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| Finance & insurance | 7 | 3 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Real estate & rental & leasing | 2 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Professional, scientific & technical services | 11 | 9 | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 0 |
| Admin, support, waste mgt, remediation ser | 13 | 9 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Educational services | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Health care and social assistance | 12 | 5 | 4 | 2 | 1 | 0 | 0 | 0 | 0 | 0 |
| Arts, entertainment & recreation | 2 | 0 | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| Accommodation & food services | 7 | 2 | 0 | 1 | 3 | 1 | 0 | 0 | 0 | 0 |
| Other services (except public administration) | 19 | 11 | 7 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| Unclassified establishments | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Appendix F: Certified Heritage Structures

National Register-Eligible Properties in TIZs

The active TIZ boundaries largely coincide with the boundaries of local or, more commonly, National Register of Historic Places historic districts. Those properties within a historic district are already eligible for the state's tax credits on rehabilitation. Any properties in current active or future activated TIZs that are eligible for the National Register but not within a designated historic district can become Certified Heritage Structures and receive the state tax credit. To begin identifying these sites, TIZ representatives and the heritage area's management entity should consult the Maryland Inventory of Historic Properties for the respective county and work with local historic preservationists.

Non-Historic Properties in the Heritage Area

MHAA will consider for certification those rehabilitations of non-historic properties that enhance the cultural, historical, or architectural quality of the heritage area/visitor experience. The Maryland Civil War Heritage Alliance will assess potential Certified Heritage Structures using the following criteria before recommending them to MHAA for approval.

Uses

- Must support the vision and goals of HCWHA as expressed in this plan or in subsequent plan amendments.
- Must conform to local zoning/land use regulations.
- Must create or improve a facility that serves or attracts visitors.
- Must be related to heritage/cultural tourism and may include, among others, interpretation, transportation, accommodation, food service, retail, and attractions. Some preferred uses are listed below:
 - **Lodging**, especially inns and bed and breakfasts. Chain hotels should not be precluded, but rather encouraged to locate in appropriate settings (ex: Downtown Hagerstown) and with added benefit to the heritage area, such as rehabilitation of a key building in downtown attempting revitalization.
 - **Dining**, especially fine dining and locally owned/operated restaurants. National fast food chains should be discouraged from utilizing the tax credits unless the project offers additional benefits to the heritage area, such as locating in an area with a shortage of food service options for visitors.
 - **Recreation-related services**, especially those linked to the area's major recreation resources. The Appalachian Trail and the C&O Canal offer opportunities for bicycle rental/repair, horseback riding facilities, tack shops,

hiking gear, and other outfitters. Unused lockhouses along the C&O in particular may make appealing small business sites.

Rehabilitation

- Project must total \$5,000 or more over a 24-month period.
- Project must follow the surrounding scale, setback, massing, architectural style, and streetscape appearance. New or changed exterior elements should strive to incorporate details and features sympathetic to the project's community.
- Projects should offer aesthetic benefit by eradicating blight; removing, mitigating, or replacing incompatible structures/sites; or otherwise adding to the historic appearance of the heritage area.

Economic Impact

The use supported by the rehabilitation project must create economic benefit for the heritage area in the form of added jobs, increased visitation, and/or increased tourism revenues. The project must create economic benefit by either serving or attracting visitors.

Appendix G: TIZ Activation Forms

TIZ Activation Form

1-5; 1= low, 3 = acceptable or satisfactory, 5 = high

| General Criteria Category | Specific Criteria | Score |
|------------------------------------|---|-------|
| Data Collection | Boundaries coincide with other program boundaries (Main Street, Downtown Planning District, etc.) | |
| | Boundaries coincide with census tract, zip code, or other data collection boundaries | |
| Public/Private Support | Planned or current new development within or adjacent to TIZ | |
| | Mixed uses, including commercial, civic, and residential | |
| | Support of elected and appointed officials | |
| | Support of business and property owners within TIZ (downtown organizations, business associations, etc.) | |
| Overlap with Other Programs | Federal Programs (National Register of Historic Places, etc.) | |
| | State Programs (Main Street Maryland, Priority Funding Area, Enterprise Zone, etc.) | |
| | Local Initiatives (Local revolving loans and grants, technical assistance programs, etc.) | |
| Ability to Leverage Results | Are needs proportionate to resources available through designation? | |
| | Do zoning/regulatory guidelines allow for expansion of commercial/tourism uses? | |
| | Concentration of underutilized/vacant properties | |
| | Are there potential private sector projects ready to commence within the next 12 months? | |
| Visitor Readiness | Pedestrian environment (Sidewalks, crosswalks, safety considerations, compact geography, etc.) | |
| | Parking availability | |
| | Major/anchor heritage attractions | |
| | Accessibility to key Civil War sites (Antietam, Monocacy, South Mountain, Harper's Ferry, Gettysburg, and others) | |
| | Visitor-ready accommodations, dining, retail, etc. | |
| Historic Integrity | Concentration of historically significant structures | |
| | Few major unsympathetic modernizations to historic buildings | |
| | Little encroaching unsympathetic development | |
| | Civil War history related to key interpretive themes | |

TIZ Questionnaire

What is the rationale for the TIZ boundaries?

What planned or current development is taking place in the TIZ?

What mix of uses exists in the TIZ?

How have local officials, businesses, property owners, and others exhibited support for the TIZ designation?

What programs and initiatives overlap with the TIZ area?

How is the pedestrian environment within the TIZ characterized?

How well is parking provided and planned?

What major or anchor heritage attractions exist in the TIZ?

What key Civil War sites are most accessible from the TIZ? How will visitors go between the TIZ and these sites?

What visitor-ready accommodations, dining, retail, etc. exist in the TIZ? What is planned for development?

Is there a concentration of historically significant structures? If so, are those structures designated on any register or district? Have many been modified unsympathetically?

How prevalent are “modern” development patterns, especially those with street front parking, in the TIZ?

Is there Civil War history in the TIZ? What interpretive themes will the TIZ explore?

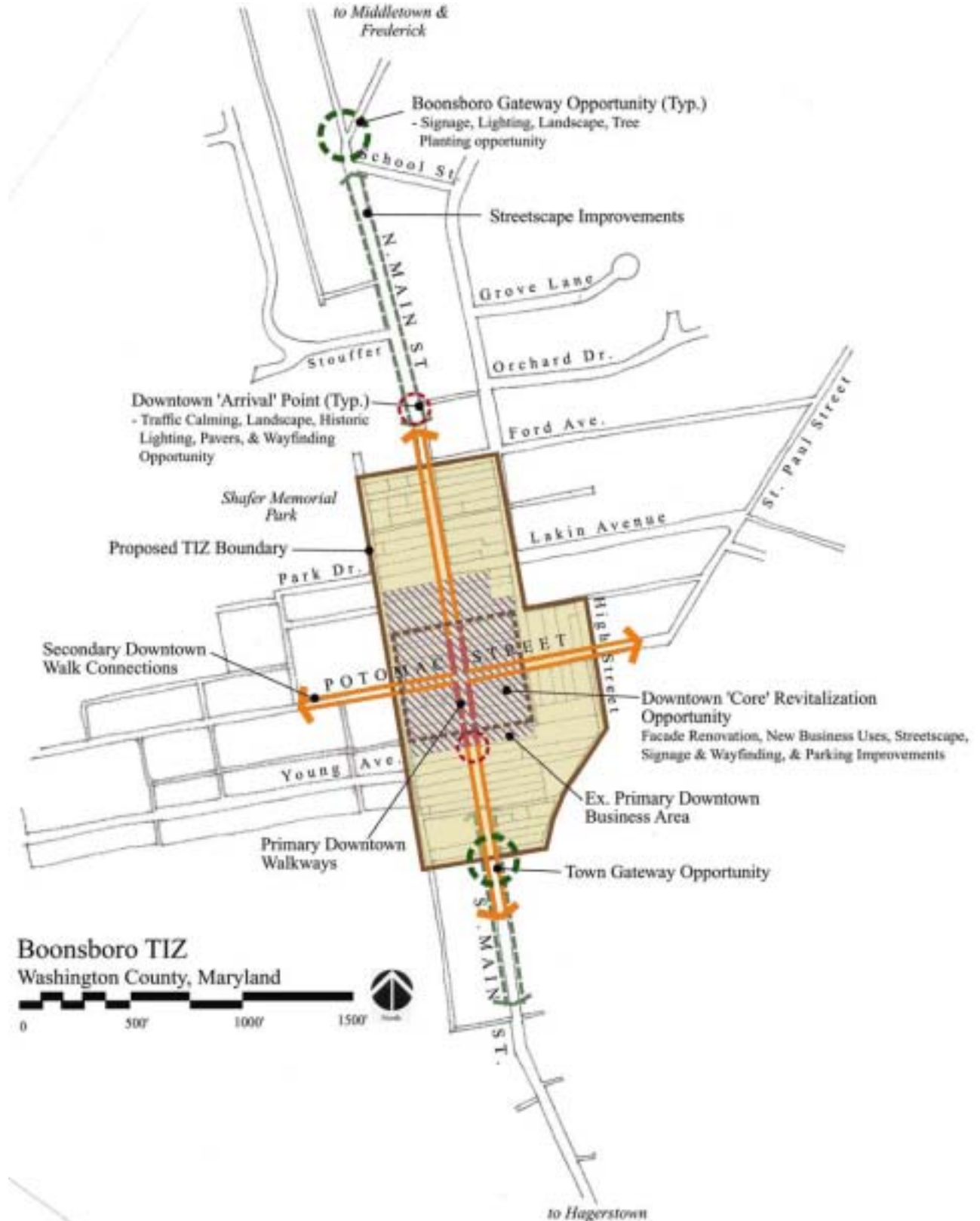
TIZ Work Program Description

The TIZ work program should include:

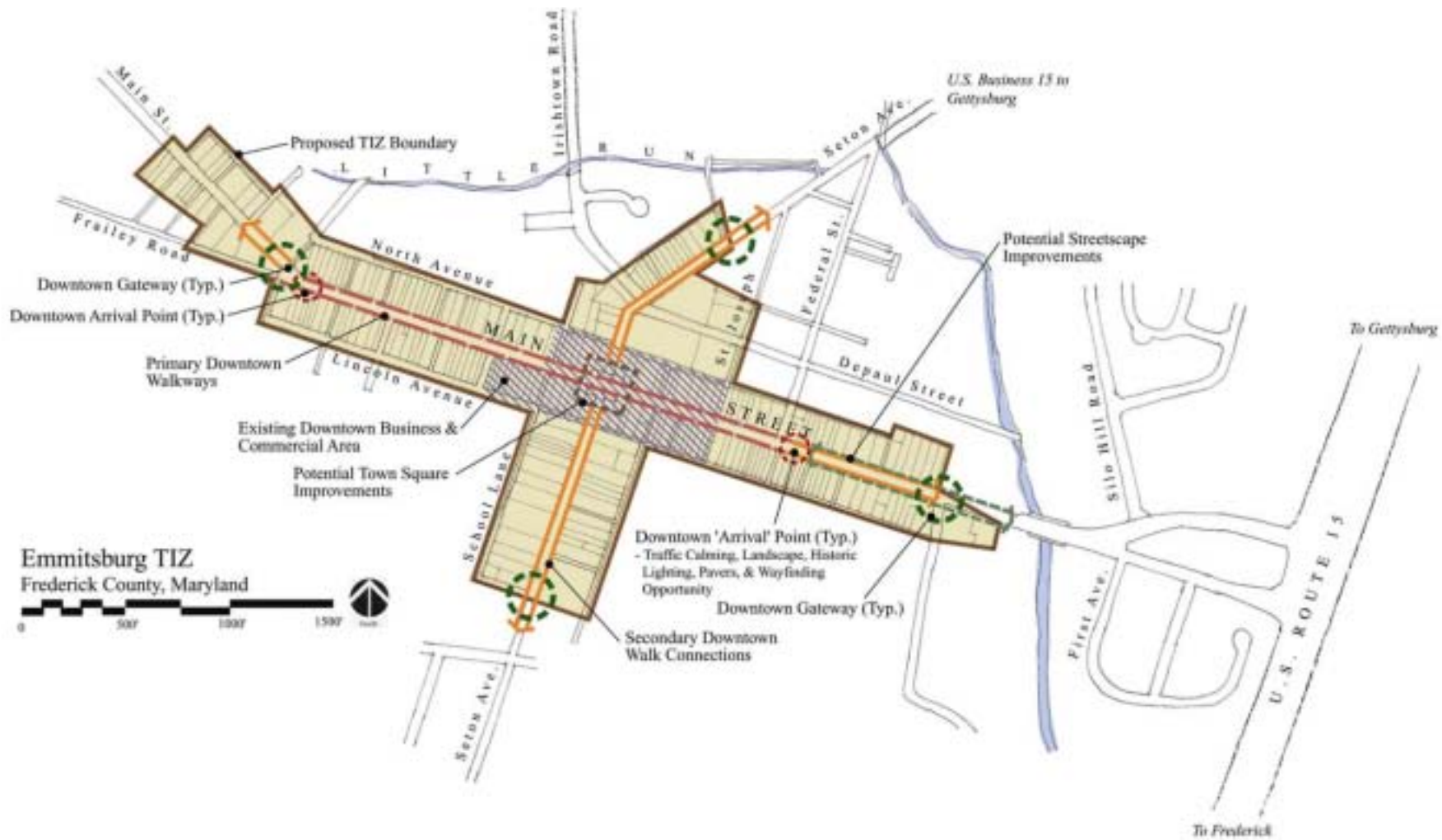
- Map of the TIZ boundaries
- General rationale for why the TIZ is being pursued
- Short history of the TIZ
- Major resource inventory, including heritage, natural/recreational, scenic, and visitor-serving commercial resources
- Identification of major issues facing the TIZ
- Identification of key opportunities within the TIZ
- Key recommendations
- Priorities for implementation and funding

Appendix H: Target Investment Zone Maps

Boonsboro

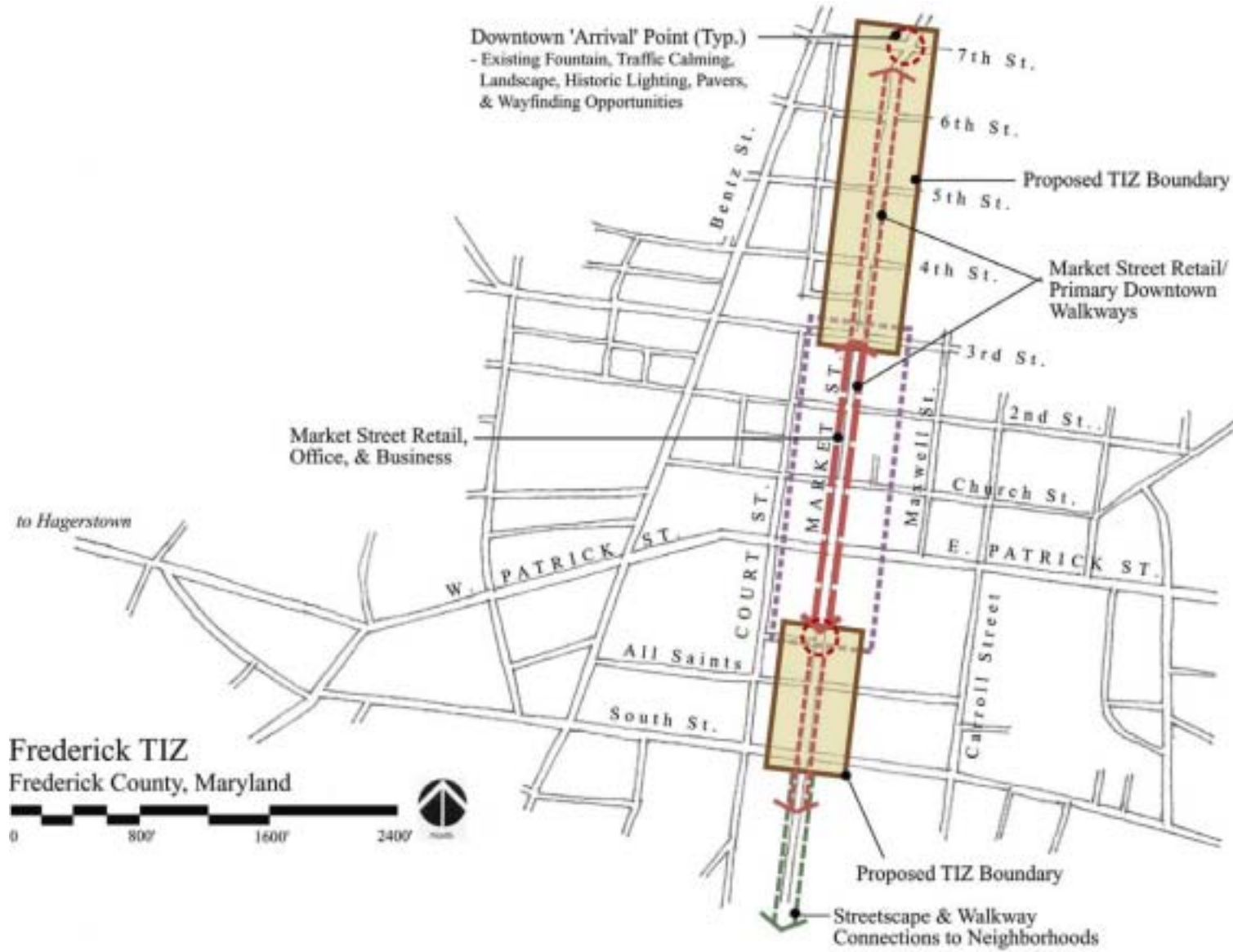


Emmitsburg



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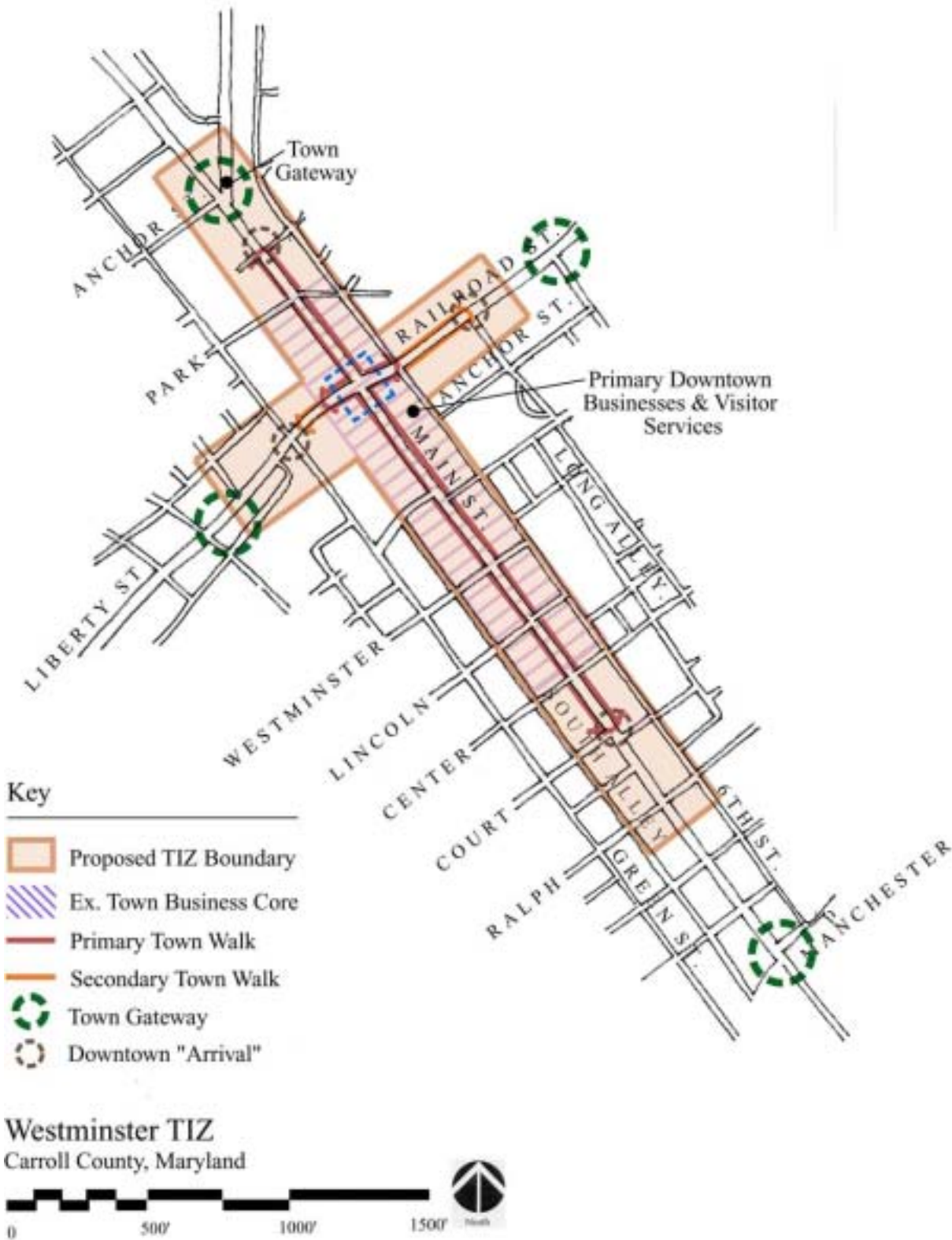
Frederick



Sykesville



Westminster



Williamsport



- Key**
- Proposed TIZ Boundary
 - Ex. Town Business Core
 - Primary Town Walk
 - Secondary Town Walk
 - Town Gateway
 - Downtown "Arrival"

Williamsport TIZ Washington County, Maryland

