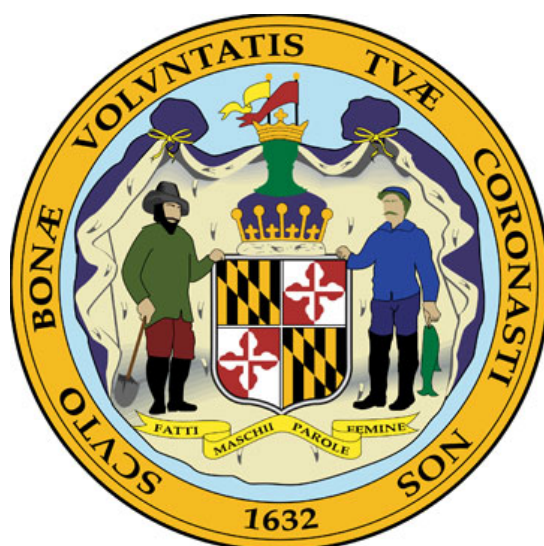


Task Force to Study a Post-Labor Day Start Date for Maryland Public Schools

Appendix XI



June 2014

Task Force to Study a Post-Labor Day Start Date for Maryland Public Schools

**Materials of Interest
March 24, 2014 Meeting**

Materials of Interest by Speaker Provided at the February 5, 2014 Meeting

Mr. Randy Mickens, Organizational Specialist, Lobbyist Maryland State Education Association

“Economic Impact of the Publicly Funded K-12 Education on the Eastern Shore of Maryland in FY 2013” Business Economic and Community Outreach Network at Salisbury University

This document provides a summary of the total economic impact of K-12 education on the Shore. Type I impacts are based on the income boost graduates receive as they improve their education and Type II impacts are based on the ability of the jurisdiction to attract and retain families with skilled and/or professional workers who are net wealth creators. Overall, the report indicates that the return on investment of the public school systems on the Eastern Shore of Maryland is approximately 95% with an annual impact of nearly 2.6 Billion and over 31,000 jobs supported.

Various Newspaper Articles Concerning Task Force to Study a Post-Labor Day Start Date for Maryland Public Schools

“School Leader Explains to Tourism Officials Why He Opposes Change To Post-Labor Day Start,” the Dispatch, February 6, 2014

Article reports that Dr. Jerry B. Wilson, Superintendent of Worcester County Public Schools was one (1) of twenty-four (24) superintendents that does not support a post-Labor-Day start date for public schools. Support for his position included the number of school related activities that start before Labor Day and that parents tend to prefer holidays breaks during the school year. He further reported that the school system surveys their parents every year and reports that the county’s parents are more satisfied now then they were in the past when the calendar started post-Labor Day. He further stated that weather is a contributing factor and that this year the school system was originally scheduled to end on June 12th but has been extended to June 18th to meet the calendar day requirements. In 2013 5% of parents commented on starting schools post-Labor Day and 55% of that 5% came from one school so it is not a county wide response. Proponents from the Ocean City’s Economic Development Committee (EDC) were dismayed by Dr. Wilson’s position and believed it is not, “only about an economic impact...it is about family and allowing extra time.” The EDC also asked that the superintendent have an open mind since, “Basically 58% of your budget is derived from Ocean City.”

“Worcester Oks Post-Labor Day Start To School; County Will Be Only One in Md.” The Dispatch, February 20, 2014

The Worcester County Board of Education voted to start schools on September 2, 2014 which is post-Labor Day. This decision was in opposition to that of Superintendent of Schools Dr. Jerry Wilson’s position. Both sides acknowledge that parent surveys did not display an overwhelming desire to return to a post-Labor Day start. Those that voted for the change indicated that Worcester County Schools are different and that the early start hurts the summer tourism

season. By changing the start date to September 2nd, the end of the year will most likely shift from June 10th to June 16th extending the year by roughly a week. This article also indicated that most likely, “the statewide task force...will submit a report endorsing legislation for all school systems to start after the Labor Day holiday...”

Chart, December 2013 through March 2014 Inclement Weather Days

This chart provides information for each LSS regarding the original closing date, the number of days built into their calendars for inclement weather, and the number of days each LSS has been closed in December, January, February, and March of this academic year.

Letters Received from Local School Systems and Local Boards of Education

This packet includes all letters received from Local School Systems and Local Boards of Education expressing their position in regard to a post-Labor Day start for public schools. This packet represents the letter received after the February 5, 2014 meeting. Letters provided at the February meeting can be found on the MSDE website at http://www.marylandpublicschools.org/taskforce/postlabordaystart/02052014_letters.html.

Maryland Tourism Information from Visitmaryland.org

“Fiscal Year 2013 Tourism Development Annual Report,” Maryland Tourism Development Board and the Department of Business and Economic Development, 2013

Task Force Member Hale Harrison provided a link to the Visit Maryland website and directed our attention to the report section, which includes the Tourism Development Annual Reports. The 2013 Annual Report provides relevant information regarding the impact of the travel and tourism industry on Maryland’s economy. Report provides a three-year prospective for three (3) distinct categories, tourism: a revenue generator, Office of Tourism Development performance measurements, and tourism sales tax revenues. The tourism sales and use tax codes are provided by county.



Economic Impact of the Publicly Funded K-12 Education on the Eastern Shore of Maryland in FY2013

The Public School Systems (grades K through 12) of the Eastern Shore of Maryland provide a wide array of benefits to the residents of each of the counties. In addition to the educational services provided to the students of the counties, the expenditures of the school system provide a significant economic impact in the counties and region

The total economic impact of K-12 education on the Shore is based on two different impact categories:

1. Type 1 Impacts:

The most obvious Type 1 impact of publicly provided K-12 education is based on the income boost graduates receive as they improve their level of education and their education outcomes. Additionally, there are the benefits derived from the public expenditures churning in the local economy through the employment of those involved in the public education enterprise, the expenditures that support the private sector vendors to the education enterprise, and the various induced economic, employment, and fiscal impacts.

2. Type 2 Impacts:

These impacts are based on the ability of the jurisdiction to attract and/or retain families with skilled and/or professional workers who are net wealth creators. On the Eastern Shore, some of these impacts are derived from the following:

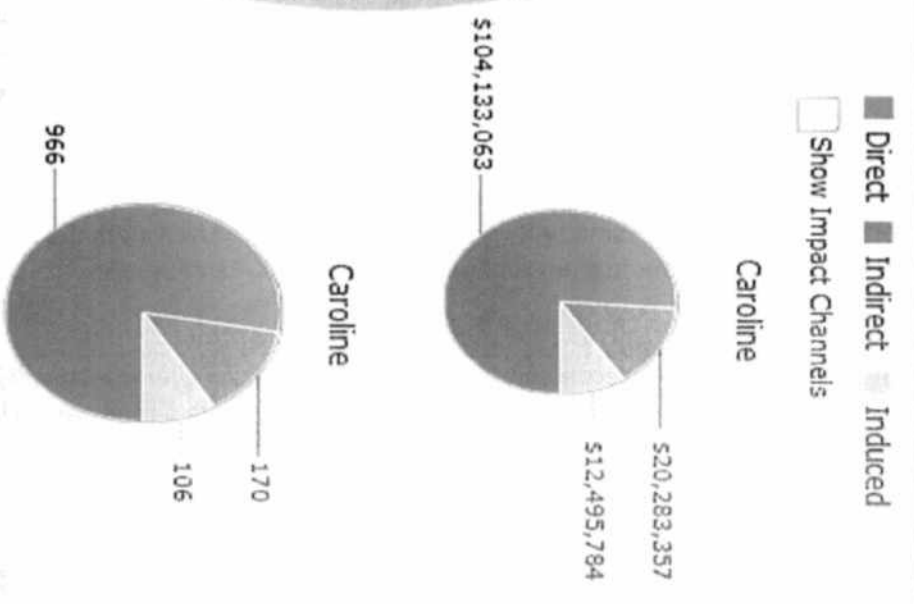
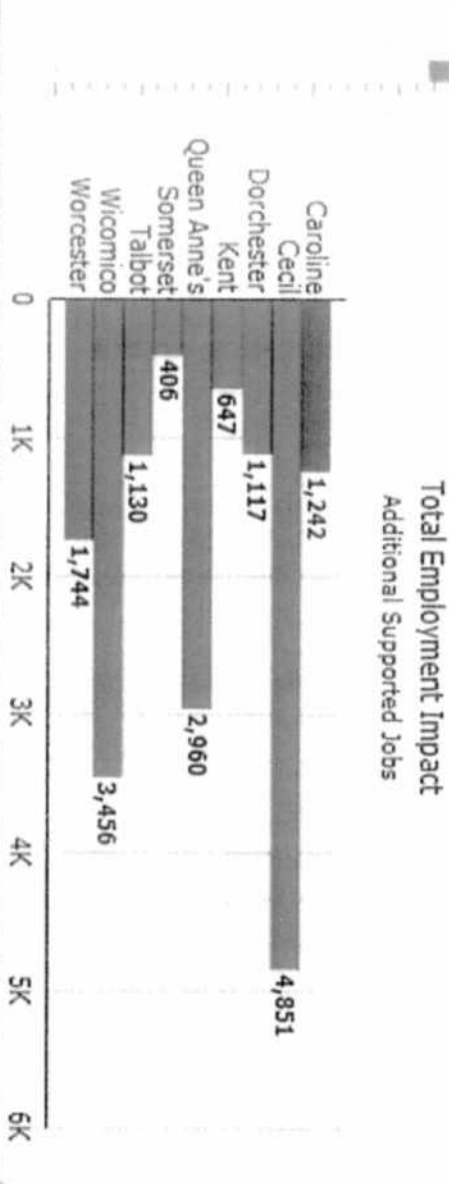
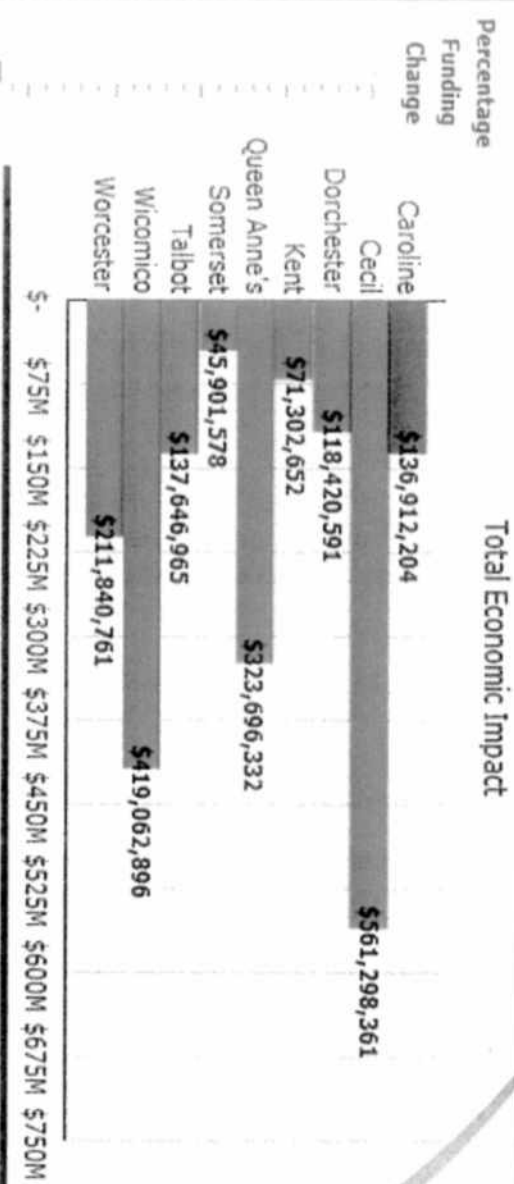
- Quality-of-Life measures that push parents to use school quality as a residential location factor;
- Quality-of-Life issues that are based on a "Sense of Well Being" for parents who believe high quality public education is essential to the success of their child's transition from high school to higher education or the labor market;
- Property value enhancements attributable to the presence of good local public schools;
- Productivity enhancements in local businesses due to quality K-12 education;
- Business, economic, workforce, and community enhancements due to increases in the number of post-secondary institution graduates in a jurisdiction due to quality K-12 education.

In Summary: The return on investment (local economic impact compared to taxpayer investment) of the public school systems on the Eastern Shore of Maryland is approximately **95%** with a total annual impact of nearly **\$2.6 Billion** and over **31,000 jobs supported**.

Eastern Shore of Maryland Education Consortium Economic and Employment Impacts of Publicly Funded Pre-K - 12 Education on the Eastern Shore

Impact Comparisons County by County Appropriations About the Dashboard

Total Eastern Shore Impacts	
Economic Impact	\$2,486,663,846
Additional Supported Jobs	21,052
Total Employment Impact	30,894



School Leader Explains To Tourism Officials Why He Opposes Change To Post-Labor Day Start

Posted on 02/06/2014 by DispatchAdmin, [The Dispatch](#)

Students at Berlin Intermediate School seek out their buses after their first day of school on Aug. 23, 2013. File Photo

OCEAN CITY – The leader of Worcester County's public schools system was met with dismay this week as Ocean City's Economic Development Committee expressed frustration with his opposition in having public schools start after Labor Day. Wednesday morning's Ocean City Economic Development Committee (EDC) special speaker was Superintendent of Worcester County Public Schools Dr. Jerry B. Wilson, who immediately acknowledged the hot topic of proposed legislation to have Maryland public schools return to starting the school year after Labor Day.

"I was one of 24 superintendents across the state that signed a letter saying we do not support the Labor Day change," Wilson said.

Wilson began the superintendent's reasoning of opposition by pointing out there is a number of school-related activities that begin prior to Labor Day, such as football practice.

"Those kids practice outdoors, and we have rules developing in our state that require us to have practices beginning prior to Aug. 15 because of heat conditions and the amount of time they are able to practice," Wilson said. Wilson continued it is parent tendencies to prefer holiday breaks during the school year, such as a two-week break given during Christmas.

"We have had an academic calendar in Worcester County several years ago that started after Labor Day, and we survey our parents every year, and mostly our parents are more satisfied currently than they were in the past," he said. Wilson furthered inclement weather has to be taken into account in designing the school calendar. The current school year was scheduled to end June 12 and due to the number of canceled school days as of right now the calendar has been extended to June 18. He pointed out if school were to start past Labor Day, plus snow days, the end of school would be pushed back later in summer.

"That also impacts the economic development in Ocean City, so there are tradeoffs on either side," Wilson said. "This is going to be in the hands of the legislature, and looking at it as the local superintendent, the legislature is going to act on it, take the position they are going to take, and we are going to have to adapt to it. I just wanted to let you know why I signed onto the letter of opposition. I know where I live. I know the importance of tourism to our county's success and to your success."

The committee had a hard time understanding how the superintendent was under the impression parents preferred a two-week winter break over an extended summer vacation.

"We have not done a survey to that degree," Wilson said.

Worcester County Public Schools conducts three surveys a year – a parent survey, a calendar survey and a communications survey, which all provide the opportunity for parents to submit comments.

"Our largest response comes from the parent survey because we solicit comments ... if the calendar is on their minds we will hear about it," Worcester County Department of Education Coordinator of Public Relations and Special Programs Barbara Witherow said.

In 2013, 4,014 parent survey forms were processed, which represents a 60-percent return rate. The third highest topic of comments submitted with 33 responses was parents who wanted school to start after Labor Day. Two responses came from Buckingham Elementary, 27 were from Ocean City Elementary and four were from Berlin Intermediate.

"We had about 5 percent of our parents comment on it, and about 55 percent of those comments came from one school ... so it was not county wide," Witherow said.

Worcester County Board of Education President Bob Rothermel furthered the calendar survey provides a selection and the option of having a longer Christmas holiday is selected most often.

"In working together, we should see how the school year benefits our students, our community and our state," Mayor Rick Meehan said. "It is about having a can do attitude, not about how we can't do it, but how can we do it." Meehan recalled when the academic calendar changed in 2008 by having school start prior to Labor Day.

"It is not only about an economic impact ... it is also about family and allowing extra time," the mayor said. "Many of our students and teachers work during the summer, and that revenue is important to them. I actually think if you put it on the ballot in Worcester County and ask voters which way they want to go most of them would say after Labor Day." Meehan asked the room to raise their hands if they went to school before Labor Day and only one hand was raised.

"If you look around, these are some of our business leaders and an educated group ...," the mayor said.

Meehan concluded by expressing his disappointment that Worcester County's superintendent would be opposed to the legislation pushing the start of schools to after Labor Day.

"I ask you to have an open mind," he said to Wilson. "I think our legislators and our citizens are listening to the superintendents, but I think the superintendents also need to listen to what we are trying to say. It is a great economic benefit ... Ocean City is 58 percent of the assessable base in Worcester County. Basically 58 percent of your budget is derived from Ocean City ..."

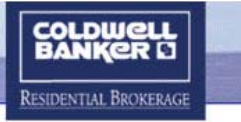
This article was written by DispatchAdmin, Joanne Shriner. Bookmark the permalink.



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OCEAN CITY – A fresh spark may come to the 4th of July fireworks show downtown this summer as the new Caroline Street Comfort Station opens an opportunity to test out a “pyromusical” display. The Recreation and Parks Department’s Special Events division has been working to bring new and exciting events to Ocean City as well as modernizing current events, ...

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Eighteen students in Worcester Technical High School’s Biomedical Science and Pre-Engineering

Worcester OKs Post-Labor Day Start To School; County Will Be Only One In Md.

Posted on **02/20/2014** by **DispatchAdmin**



SNOW HILL — For the first time in five years, Worcester County Public Schools (WCPS) will be the only school system in Maryland to start classes after Labor Day for the 2014-2015 school year.

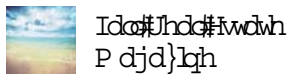
WCPS broke ranks with the rest of the state this week when the Board of Education voted to return to a post-Labor Day start of Sept. 2.

“I didn’t mind being the last school district in the state to go before Labor Day,” said Board of Education President Bob Rothermel, “and I don’t mind being the first school district to go after Labor Day. Maybe it will send a message.”

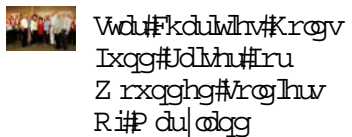
The debate over when the school year should begin has raged in Worcester since it became the last school system to begin classes before Labor Day back in the 2009-2010 school year. Opponents have argued that the early start hurts resort businesses since they lose their student workers before the end of the busy summer season as well as the fact families cut short their vacation seasons. Proponents have countered that the extra time is needed to prepare for exams and that an earlier last day is better for students and parents.

Rothermel’s stance is in opposition to that of Superintendent of

programs recently conducted a community partnership project involving redesigning a new emergency department waiting room for AGH. Some of the students are pictured above presenting the concept to AGH officials earlier this month.



Click link to view more than 100 listings of local real estate:
<https://interactivepdf.uniflip.com/2/64036/314397/pub/>



Anna Foults's Star Charities held its latest fund raiser at the Ocean Pines Community Center Sept. 20 to raise funds to benefit Wounded Soldiers of Maryland. Pictured, from left, are Charles and Sharon Sorrentino, Worcester County Commissioner Judy Boggs, Anna Foults, candidate for Maryland House of Delegates for District 38C Mary Beth Carozza, Senator Jim Mathias, Co-host Gilly Foults and Emcee Larry Walton. ...
Continue reading →

because of heat conditions and the amount of time they are able to practice," Wilson said.

Wilson continued it is parent tendencies to prefer holiday breaks during the school year, such as a two-week break given during Christmas.

"We have had an academic calendar in Worcester County several years ago that started after Labor Day, and we survey our parents every year, and mostly our parents are more satisfied currently than they were in the past," he said.

Wilson furthered inclement weather has to be taken into account in designing the school calendar. The current school year was scheduled to end June 12 and due to the number of canceled school days as of right now the calendar has been extended to June 18. He pointed out if school were to start past Labor Day, plus snow days, the end of school would be pushed back later in summer.

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This article was written by [DispatchAdmin](#), [Joanne Shriner](#). Bookmark the [permalink](#).

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One comment on “School Leader Explains To Tourism Officials Why He Opposes Change To Post-Labor Day Start”



Joan Wood on [02/07/2014 at 10:04 am](#) said:

December 2013 and January 2014 Inclement Weather Days

System/last day	Inclement weather	12/9/13	12/10/13	1/3/14	1/6/14	1/7/14	1/10/14	1/21/14	1/22/14	1/23/14	1/24/14	1/27/14	1/28/14	1/29/14	1/30/14
Alegany 5/30	12 days	Closed	Closed 2 hr 12/12	Closed	Mt. Ridge 2 hr del	Closed 2 hr 1/8/14	Closed	Closed	Closed	2 hr del	Closed	2 hr del	Closed	2 hr del Mt. Ridge closed	2 hr del
Anne Arundel 6/17	4 days	2 hr del	Closed	Closed				Closed	Closed	2 hr del	2 hr del			Closed-PD	Closed-PD
Balto. City 6/16	5 days	Closed	Closed	Closed			2 hr del	Closed	Closed	2hr. del				2 hr del	
Baltimore Co 6/17	7 days	Closed	Closed	Closed		2 hr del	2 hr del	Closed	Closed-PD	2 hr del				2 hr del	
Calvert 6/12	5 days	2 hr del	Closed	Closed				Closed	Closed	Closed	2 hr del			Closed-PD	2 hr del
Caroline 6/13	4 days	2 hr del	Closed	Winter				Closed-PD	Closed	Closed	Closed	2 hr del		Closed	2 hr del
Carroll 6/12	5 days	Closed	Closed	Closed			2 hr del	Closed	Closed-PD	2 hr del				2 hr del	
Cecil 6/6	6 days	Closed	Closed	Closed		Closed	Closed	Closed	Closed	2 hr del	2 hr del			2 hr del	
Charles 6/12	4 days	2 hr del	Closed	Winter			Closed	Closed	Closed	2 hr del				Closed	
Dorchester 6/10	5 days	Al. Closed		Closed				Closed	Closed	Closed	Closed	2 hr del		Closed	Closed
Frederick 6/11	5 days	Closed	Closed	Closed	2 hr del		2 hr del	Closed	Closed	2 hr del				2 hr del	
Garrett 6/3	6 days	Closed	2 hr del	Closed	Closed	Closed/ Closed- 1/8/14	2 hr del 2 hr del	Closed	Closed	Closed	Closed	Closed	Closed	Closed	2 hr del
Harford 6/9	6 days	Closed	Closed	Closed	2 hr del		2 hr del	Closed-PD	Closed-PD	2 hr del	2 hr del			Closed	
Howard 6/18	5 days	Closed	Closed	Closed			2 hr del	Closed-PD	Closed	2 hr del				2 hr del	
Kent 6/13	4 days	2 hr del	Closed	Closed		2 hr del		Closed-PD	Closed	Closed	Closed	90 min		Closed	2 hr del
Montgomery 6/12	4 days	Closed	Closed	Closed			2 hr del	Closed-PD	Closed	2 hr del	Closed			2 hr del	
Pr. George's 6/6	4 days	2 hr del	Closed	Closed		2 hr del		Closed	Closed	2 hr del	2 hr del			2 hr del	
Queen Anne 6/12	5 days	90 min	Closed	Closed			2 hr del	Closed-PD	Closed-PD	Closed	Closed	90 min		Closed	90 min
St. Mary's 6/12	5 days	2 hr del	Closed	Closed		2 hr del	Closed	Closed-PD	Closed-PD	Closed	Closed			Closed	2 hr del
Somerset 6/12	3 days			Winter				Closed	Closed	Closed	Closed-PD			Closed	Closed
Talbot 6/11	0 eoc	90 min	Closed	Closed				Closed-PD	Closed	Closed	Closed	2 hr del		Closed	2 hr del
Washington 6/12	5 days	Closed		Closed		Closed		Closed-PD	Closed	2 hr del				Closed	
Wicomico 6/6	5 days			Winter				Closed	Closed	Closed	Closed-PD			Closed	Closed
Worcester 6/12	3 days			Winter				Closed	Closed	Closed	Closed			Closed	Closed
SEED	5 days	Closed		Winter				Closed	Closed	Closed	Closed				

MARCH School Closings

System/last day	Inclement weather	3/3/14	3/4/14	3/5/14	3/17/14	3/18/14	3/26/14			
Allegany 5/30	12 days	Closed			Closed		2 hr del			
Anne Arundel 6/17	4 days	Closed	Closed		Closed					
Balto. City 6/16	5 days	Closed	2 hr delay		Closed					
Baltimore Co 6/17	7 days	Closed	2 hr delay		Closed	2 hr del				
Calvert 6/12	5 days	Closed	Closed	2 hr del	Closed	2 hr del				
Caroline 6/13	4 days	Closed	Closed	2 hr del	Closed	2 hr del	2 hr del			
Carroll 6/12	5 days	Closed	Closed		Closed					
Cecil 6/6	6 days	Closed	2 hr delay		Closed					
Charles 6/12	4 days	Closed	Closed	2 hr del	Closed					
Dorchester 6/10	5 days	Closed	Closed	2 hr del	Closed	2 hr del	2 hr del			
Frederick 6/11	5 days	Closed	Closed		Closed					
Garrett 6/3	6 days	Closed			Closed		2 hr del			
Harford 6/9	6 days	Closed	2 hr delay		Closed					
Howard 6/18	5 days	Closed	Closed		Closed	2 hr del				
Kent 6/13	4 days	Closed	Closed	2 hr del	Closed					
Montgomery 6/12	4 days	Closed	Closed		Closed					
Pr. George's 6/6	4 days	Closed	Closed		Closed					
Queen Anne 6/12	5 days	Closed	Closed	90 min	Closed					
St. Mary's 6/12	5 days	Closed	Closed	2 hr del	Closed	2 hr del				
Somerset 6/12	3 days	Closed	Closed		Closed		Closed			
Talbot 6/11	0 eoc	Closed	Closed	2 hr del	Closed	2 hr del	90 min			
Washington 6/12	5 days	Closed			2 hr del					
Wicomico 6/6	5 days	Closed	Closed	2 hr del	Closed		Closed			
Worcester 6/12	3 days	Closed	Closed	1 hr del	Closed		Closed			
SEED	5 days	Closed	Closed							

TASK FORCE TO STUDY A POST-LABOR DAY START DATE FOR MARYLAND PUBLIC SCHOOLS

February 5, 2014

West County Area Library Meeting Room A

Letters Received From Local School Systems and Local Boards of Education

Baltimore City Public Schools	Signed by: Ms. Tisha Edwards, Interim CEO
Baltimore County Public Schools	Signed by: Dr. S. Dallas Dance, Superintendent and Mr. Lawrence E. Schmidt, President of the Board
Board of Education of Cecil County	Signed by: Ms. Dawn K. Branch, President, Cecil County Board of Education
Charles County Public Schools	Signed by: Dr. Kimberly A. Hill, Superintendent
The Board of Education of Dorchester County	Signed by: Philip L. Bramble, President and Dr. Henry V. Wagner, Jr. Superintendent
Garrett County Board of Education	Signed by: Thomas A. Carr, Rodney A. Reckart, Cynthia Downton, Charlotte A. Sebold and Matthew Paugh- Board Members
Garrett County Public Schools	Signed by: Dr. Janet S. Wilson, Superintendent
Maryland Association of Boards of Education	Signed by: Kathryn B. Groth, President
Queen Anne's County Public Schools	Signed by: Dr. Carol A. Williamson, Superintendent
St. Mary's County Public Schools	Signed by: Dr. Michael J. Martirano, Superintendent
Somerset County Public Schools	Signed by: Dr. John B. Gaddis, Interim Superintendent

2/8/14 Letters Received From Local School Systems and Local Boards of Education since the meeting

Allegany County Public Schools	Signed by: Dr. David A Cox, Superintendent and Mrs. Laurie Marchini, Board of Education
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Letters Received Continued:

Calvert County Public Schools

Signed by: Ms. Nancy V. Highsmith, Interim Superintendent

Board of Education of Frederick County

Signed by: Ms. Joy Schaefer, President

Frederick County Public Schools

Signed by: Ms. Paulette Anders, Co-Chair, Frederick County Calendar Committee, and Ms. Tracey Lucas, Frederick County Calendar Committee

Harford County Public Schools

Signed by: Joseph Licata for Mrs. Barbara Canavan, Interim Superintendent

Board of Education of Kent County

Signed by: Dr. Karen M. Couch, Superintendent

Prince Georges County Public Schools

Signed by: Dr. Kevin M. Maxwell, Chief Executive Officer

Talbot County Public Schools

Signed by: Mrs. Kelly L. Griffith, Interim superintendent and Juanita S. Hopkins, Esq., Board President

Montgomery County Public Schools

Signed by: Dr. Joshua P. Starr, Superintendent

Board of Education of Wicomico County

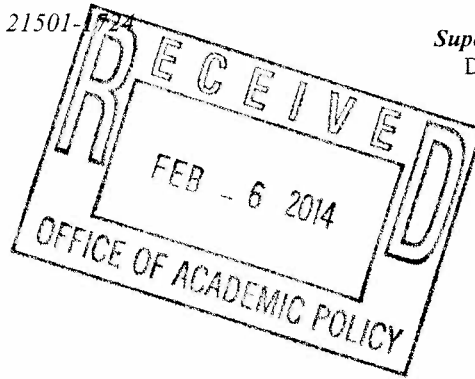
Signed by: Dr. John Fredericksen, Superintendent



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Members of the Board of Education
Laurie P. Marchini, President
Nicholas T. Hadley, Vice President
Sara-Beth James
Michael A. Llewellyn, Esq.
Edward L. Root, Ed.D.

Superintendent of Schools
David A. Cox, Ed.D.



February 5, 2014

Mr. William Cappe, Chairman,
Post Labor Day School Start Taskforce
Maryland Department of Education
200 West Baltimore St
Baltimore, MD 21201

Dear Mr. Cappe:

With regard to the charge your committee was given by legislation enacted by Senate Bill 963 in 2013, **we are** compelled and encouraged to provide you perspectives on this matter that are extremely important to Allegheny County Public Schools. It is **our** most sincere hope that you will receive these thoughts as **we** intend, and that is the impact on the school year calendar on our core mission and duty – to educate our children to increasingly high standards to the best of our ability. Certainly time is one of the most important resources necessary when delivering a program of instruction to a diverse population of learners. A school year calendar represents the most comprehensive management of our instructional time resource.

As you and your committee are acutely aware, Maryland is currently embracing and effecting more simultaneous change in our instructional program than at any other time within the past fifty (50) or more years. Transitioning to the Common Core Curriculum Framework, new PARCC Assessments, and a new Teacher and Principal Evaluation System are important and monumental efforts that require much planning, care, and excellent stewardship of our precious time resources.

Maryland has a lot to be proud of with its traditions of excellence in public education. Part of that tradition has included a historically good balance of Executive, Legislative and Departmental Leadership with that of the Local leadership of duly elected and/or appointed Boards of Educations and local school system leadership. **We are** proud to be part of, and local contributors to that well known and celebrated tradition of excellence that makes up Maryland's Public Schools.

In response to the concern and prospect of upsetting the current demonstrated effective balance of state versus local control of our precious instructional time resource as we deliver our program of

"Better Schools, Brighter Futures"

instruction, The Allegany County Board of Education included in its 2014 Legislative Priorities a strong statement that asks The Western Maryland Delegation to the General Assembly to: *“Support locally elected Boards of Education by preserving their ability to set their own school calendars, school start times, and all other areas that impact the local delivery of the instructional program, and oppose any legislation that would undermine this local control”*.

Locally elected/appointed Boards of Education, superintendents, principals, teachers, parents and students are all working harder than ever so that our children are better ready for College and Careers. This work is in response to the appropriate action and leadership of the Governor, The Maryland General Assembly, The State Board of Education, and our State Superintendent. We believe that we must be allowed to continue to meet those challenges with the flexibility to organize our school year time resources in a way that has proven effective over the course of many years.

In Western Maryland and in Allegany County we have challenges and factors that we consider locally as we set our school year calendar. We seek and consider input from our community, teachers, principals, and other instructional leaders. Among our broad local constituency, it is generally agreed that instructional days are of far greater value earlier in the academic year than later.

There are several reasons for this conclusion, which has dissuaded us from adopting a post Labor Day start. First, we have worked hard to partner with Frostburg State University and most especially Allegany College of Maryland, years before Senate Bill 740 was enacted, to provide for and encourage our high school student to take college courses during the school year. Unless both partner institutions would also start after Labor Day (which they currently do not) our students would be at a distinct disadvantage by missing valuable instruction time in their college courses. Secondly, we have lots of winter weather that greatly impacts and disrupts our school year schedule. In many years, including this current year, we are very likely to miss as many as 10 days or more due to inclement weather. In such years, starting after Labor Day easily would extend the school year to July 1. Not all of our schools are yet air conditioned, even though we have made it a priority and have made much progress toward that goal.


A third, and highly important consideration is the time resource needed – especially now – to provide high quality professional development thorough out the school year to our teachers and principals to meet the demanding changes to our programs of instructional delivery and accountability to get our students better ready for college and careers. Having this time during the school year provides time for reflection, refinement and practice. Starting school after Labor Day would force a compressed school year calendar and would inhibit our ability to deliver professional development during the school year.

There are many other reasons that we could share, but in summary, **we** have been asked to meet increasingly higher academic standards for all of our children and not rest on the fact that Maryland has been the highest performing state in K-12 public educations for five years running. We are working hard every day in every classroom to meet higher standards and higher challenges. We have demonstrated time after time that we can meet those challenges with appropriate local control of our instructional time resource.

We urge a comprehensive consideration all the factors and inputs from all of Maryland, and not to hastily conclude your work in deference to deliver an expedited report so that legislation can be considered during the 2014 Session of the General Assembly. Senate Bill 963 was passed with the important caveat that your Task Force would have an appropriate time resource until June 14, 2014 to thoughtfully consider and complete your work. **We** expect that many members of the General Assembly voted for this legislation because of that caveat.

Thank you for your consideration of our inputs as you give consideration to your recommendations. If **we** can provide further information or clarification on our position, please contact **us**.

Sincerely,



Dr. David A. Cox



Mrs. Laurie Marchini

DAC/LM/ram

Calvert County Public Schools

Nancy V. Highsmith, Interim Superintendent of Schools

1305 Dares Beach Road
Prince Frederick, MD 20678
Telephone: (410) 535-1700
(301) 855-1834
FAX: (410) 535-7298
TDD: (410) 535-6852
<http://www.calvertnet.k12.md.us>

February 7, 2014

Mr. William Cappe
Maryland State Department of Education
200 West Baltimore Street
Baltimore, MD 21201

Dear Mr. Cappe:

I am writing to recommend that Maryland public school systems continue to have autonomy in determining their annual operational calendars. Each year, Calvert County Public Schools convenes a calendar committee for this purpose.

The calendar committee consists of a number of stakeholders, including community members, parents, union representatives, and employees. Constituent groups include, but are not limited to, the Citizens' Advisory Council, the Calvert County Council of Parents/Teachers Association, the Calvert Education Association, the Calvert Association of Educational Support Staff, the Calvert Association of Supervisors and Administrators, the Local Accountability Coordinator, the Director of Finance, a representative from the Department of Instructional and Information Technology, and the committee chairperson.

Following a series of meetings last winter, the calendar committee presented to our Executive Team and Board of Education a proposed operational calendar for the 2014-2015 school year. The proposed calendar was posted for public review and comment for a period of thirty (30) days. Upon completion of the review period, the Board of Education has the option to approve with or without revisions or to remand the calendar back to the committee for further study. The operational calendar for 2014-2015 has already been approved by the Board of Education and presented to the public.

In the development of the operational calendar, the committee considers a number of factors including federal holidays, federal/state/local elections (schools are used as polling sites), national/state/local testing mandates and schedules, local community events, negotiated agreements with employee associations, professional staff development needs and requirements, opportunities to hold parent/teacher conferences, contingencies for national/state/local emergencies and inclement weather, and other community needs or preferences.

In Calvert County, the first school day for students has traditionally occurred before Labor Day. This year, August 20, 2013, was the first day for students. For 2014-2015, the first school day for students will be August 19, 2014. The first school day for students is usually the last date set during calendar development since days in August must be added so that the calendar satisfies the annual requirement of 180 school days for students.

Mr. William Cappe
Page 2
February 7, 2014

Our operational calendar has traditionally contained other events based on the interests of our community, parents, and staff, such as:

- Youth Day – opportunity for students and their families to attend the Calvert County Fair
- Winter Recess – length of break varies depending where Christmas and New Year's Day fall on the calendar
- Spring Recess – usually occurs either the week before or after Easter Sunday
- Contingency days – five (5) school days are built-in to allow for closings due to emergencies and/or inclement weather

In closing, I want to reiterate that the loss of autonomy in the operational calendar development process would negatively impact our ability to establish an operational calendar that is conducive to student learning and sensitive to the interests of our community. On behalf of our students, employees, parents, community members, and Board of Education, I strongly recommend that Maryland public school systems continue to have autonomy in determining their annual operational calendars.

Sincerely,



Nancy V. Highsmith
Interim Superintendent

BOARD OF EDUCATION OF FREDERICK COUNTY

191 South East Street
Frederick, Maryland 21701

Telephone 301-696-6850
FAX 301-696-6950

Joy Schaefer
President

February 5, 2014

Mr. William Cappe, Chair
Ms. Sarah Spross, Co-Chair
TASK FORCE TO STUDY A POST-LABOR DAY START DATE
FOR MARYLAND PUBLIC SCHOOLS
c/o State Department of Education
Division of Educator Effectiveness
Nancy S. Grasmick State Education Building
200 West Baltimore Street
Baltimore, Maryland 21201-2595

Dear Mr. Cappe and Ms. Spross,

Thank you for your service and work on this issue. I had hoped to attend your February 5th meeting to give public comment. Unfortunately, I have to attend a meeting in Annapolis at the last minute and am unable to attend. Instead, on behalf of the Board of Education of Frederick County, I would like to take the opportunity to submit written comment regarding your work.

We feel strongly that dictating the start date for school systems statewide would pose a host of challenges for many school systems in providing adequate instruction in the face of more rigorous and complex learning standards. We also contend that setting a statewide start date would eliminate the flexibility for local schools to meet the unique needs of the communities they serve, and encroach on local autonomy and local governance.

The School Calendar as an Instructional Tool

Traditionally, developing the academic calendar is one of the most difficult tasks we take on each year as a school board. We have a good deal of limitations and requirements that we must first take into consideration, including the required 180 days of instruction, mandated federal and state holidays, as well as the dates designated for the administration of required performance assessments and exams that fulfill graduation requirements.

Currently, with the adoption of the new Common Core State Standards (CCSS), our students face increased rigor in the classroom. Our teachers juggle meeting individual learners' needs while mastering new content and developing new curriculum. Teachers and school system staff must acquire an understanding of the new state assessments and how to use the resulting data to drive instruction.

In order to meet the expanding needs of our students, educators must take a hard look at our traditional calendar. Now more than ever, the calendar plays a critical role in promoting student growth and achievement, supporting our teachers in helping students

reach their full potential, and in providing the time needed for effective and meaningful teaching and learning.

Local Governance and Accountability

Our Board feels strongly that local control and decision-making authority is the best way to monitor and improve student performance, allocate and marshal resources effectively and efficiently, and ensure accountability. As the local authority, we are accountable for our students' performance and progress. As such, we must have the flexibility to address each student's unique learning needs.

Our communities have unique needs as well. The local authority is the best entity to conduct public engagement that is best able to protect local tradition, values and priorities. Frederick County is an agricultural county and is culturally and economically different from many of Maryland's diverse counties across the state. Our school calendar reflects our county's singular identity.

Taking into consideration these issues, we respectfully ask that the task force keep in mind the importance of allowing local school districts to retain their ability to determine what is best for their students, families and communities by allowing us to make the most basic decision regarding the school calendar – what day will be our students' first day of school.

Sincerely,

Signed by Joy Schaefer

Joy Schaefer
President

c: Members, Board of Education
Dr. Theresa Alban, Superintendent
Members, Frederick County Delegation to the General Assembly
Frederick County Board of County Commissioners

OFFICE OF SCHOOL ADMINISTRATION &
LEADERSHIP PreK-12
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Frederick, Maryland 21701
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www.fcps.org

Tracey Lucas
Executive Director
tracey.lucas@fcps.org

Cheryl Bales
Senior Executive Secretary
cheryl.bales@fcps.org



Frederick County Public Schools

Reach. Challenge. Prepare.

February 4, 2014

Mr. William Cappe
Maryland State Department of Education
200 West Baltimore Street
Baltimore, Maryland 21201

Dear Mr. Cappe,

For the past two years, the Frederick County Public School Calendar Committee has put forth great effort to establish an instructional calendar for the families and students of Frederick County. To that end, the committee, consisting of parent, teacher, administrator, business, transportation, curriculum and central office representatives has worked diligently to develop a school year calendar that focuses on instruction above all else.

The committee spent significant time researching calendars across the state and nation as well as researching start of day and length of day. As the committee developed proposed calendars, it presented the calendars for broad-based stakeholder feedback via the Frederick County Public Schools website, social media and community meetings led by our Board of Education. The Committee feels strongly that local input from local stakeholders provides the best guidance to the local Board of Education which ultimately makes this decision.

The Frederick County Public School Calendar Committee firmly supports school year calendar decisions remaining at the local level. With two of our committee members currently serving on the State Labor Day Task Force, and having heard the rationale for a state-mandated post-Labor Day start for all Maryland schools, our committee is fundamentally opposed to school calendars being driven by economics and not instruction. Our committee asserts that it is critically important that local autonomy be established and recommend the school calendar for the subsequent school year remain intact. The committee also maintains that the following are critical to an instructional calendar and have not been fully considered by the Task Force:

- local preference of parents, students and community members
- weather related impact on individual districts which are geographically diverse
- ongoing professional development and training needs of individual systems
- state and local testing windows/mandates
- extra-curricular programs
- optimal learning environment for students pre K – 12.
- local community events

Again, the Frederick County Public School Calendar Committee respectfully reiterates its position that the school calendar remain under the authority of local Boards of Education. This is the only way to maintain a calendar that meets the needs of the individual districts and focuses on instruction, not economics.

Respectfully,

Paulette Anders, Co- Chair, Frederick County Calendar Committee
Tracey Lucas, Co- Chair, Frederick County Calendar Committee



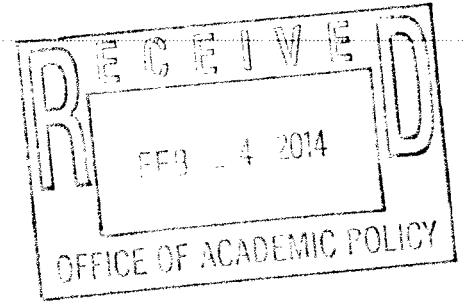
HARFORD COUNTY
PUBLIC SCHOOLS

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Barbara P. Canavan, Superintendent of Schools
102 S. Hickory Avenue, Bel Air, Maryland 21014
Office: 410-838-7300 • www.hcps.org • fax: 410-893-2478

February 3, 2014

Mr. William Cappe
Maryland State Department of Education
200 West Baltimore Street
Baltimore, Maryland 21201



Dear Mr. Cappe:

The Harford County Public Schools (HCPS) opposes any legislative or regulatory initiatives which would have the effect of reducing local board governance in matters such as setting the school calendar. HCPS has a calendar committee made up of a variety of community and school system stakeholders which examines calendar options to better meet the instructional needs of our students.

HCPS sees five primary advantages to maintain an earlier start to the school year:

- Aligns the HCPS calendar with local colleges and universities for better access for students who participate in dual enrollment courses (taking a college class while in high school).
- Provides more instructional time for teachers and students before the PARCC and MSA/HSA testing.
- Ever increasing numbers of high school students are taking the national Advanced Placement tests. The College Board sets the dates these tests are administered in the spring, not the local school system. A school calendar starting before Labor Day allows our students to have more pretest instructional time.
- Gives greater scheduling flexibility in case of a large number of weather-related closings.
- Ends the school year a week earlier in June. Proponents of measures to start school after Labor Day argue that it will boost the state tourism industry and tax revenue. However, for some families with school-age children, a vacation in mid-June or July is far more feasible than one in the last week of August. By that time, our high school students are immersed in sports, band, orientations and numerous other school activities.

I want to thank you and the Labor Day Task Force for the opportunity to comment on this important issue.

Sincerely,

Barbara P. Canavan
Interim Superintendent of Schools

**BOARD OF EDUCATION OF KENT COUNTY****5608 BOUNDARY AVENUE * ROCK HALL, MARYLAND 21661 * PHONE 410-778-7113
FAX # 410-778-2350****OFFICE OF THE SUPERINTENDENT
KAREN M. COUCH, ED.D.**

February 5, 2014

Mr. William Cappe
Maryland State Department of Education
200 West Baltimore Street
Baltimore, Maryland 21201

Re: Statewide Mandate for Start of School Year

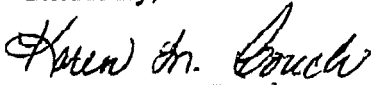
Dear Mr. Cappe,

The Kent County Public Schools (KCPS) opposes a statewide mandate to begin the school year after Labor Day. School calendars reflect the unique needs of each community; therefore, local autonomy must remain intact to afford us that option. KCPS involves many stakeholders throughout the development of our school calendar; therefore, the final recommendation is a product of community "wants" and "needs" of the school system. The marriage of all these priorities is a time intensive task as we must consider time allocation for academic planning, professional development to unpack the new standards, scheduled holidays, and flexibility for inclement weather, which has been very challenging this year.

In order for KCPS to maintain these priorities, our school year would have to be extended until the end of June, due to a later start. In my community, parents would be equally upset about having to delay their vacations because of a statewide mandate. It is very important for each school system to be afforded the autonomy to decide what is best for their community of learners. Therefore, I urge the Task Force to reject any recommendation that would place these decisions in the hands of those who are not familiar with our communities needs.

Thank you for your leadership and facilitation of the work of the Task Force.

Sincerely,


Dr. Karen M. Couch
Superintendent of Schools

SUCCESSFUL LEARNING FOR ALL STUDENTS



Kevin M. Maxwell, Ph.D.
Chief Executive Officer

February 7, 2014

Mr. William Cappe
Task Force to Study a Post-Labor Day Start Date of Maryland Public Schools
Maryland State Department of Education
200 West Baltimore Street
Baltimore, Maryland 21201

Dear Task Force Members:

As Chief Executive Officer of the 2nd largest school system in the state of Maryland, Prince George's County Public Schools, I would like to express my position on seeking a state law requiring all school systems to commence school after Labor Day.

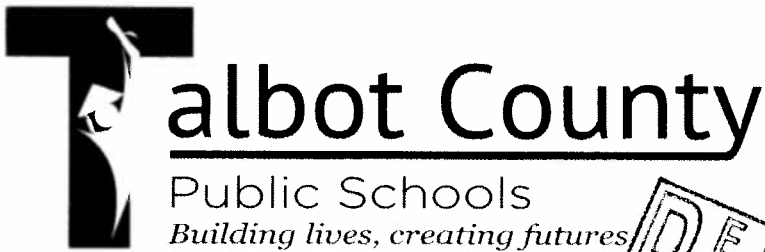
I am strongly OPPOSED to any legislation that would diminish our Board's ability to have local autonomy to create a school calendar that meets the needs of our parents, students, staff, and community members. We receive input from a wide range of constituent groups in the creation of our school calendar which takes into consideration national, state and local variables when making recommendations to our school board. These considerations are academic related (i.e., dates of Advanced Placement and International Baccalaureate examinations); centered around professional growth experiences for our staff; extracurricular experiences; and even preferences from our parents, students, and community members. Moreover, any earlier start permits an earlier ending, giving our students an advantage over those in the District of Columbia and Virginia as they seek summer employment opportunities.

Seeking a state law requiring all local educational agencies to conform to the same schedule would not be conducive to the diverse needs of the twenty-four (24) districts in the state of Maryland. This year's inclement weather has shown, again, why districts need maximum flexibility. I am encouraging you to take into consideration the plea of each superintendent in Maryland and the State Superintendent of Schools not to move forward with a recommendation that would mandate a post-Labor Day start.

If you have any additional questions, please do not hesitate to contact me.

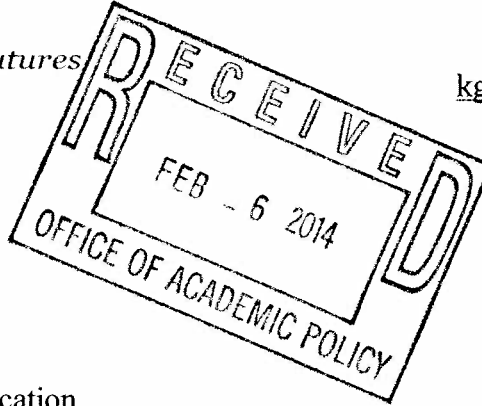
Sincerely,

Kevin M. Maxwell, Ph.D.
Chief Executive Officer



P.O. Box 1029
Easton, MD 21601
Phone: (410) 822-0330

Kelly L. Griffith
Interim Superintendent
kgriffith@tcps.k12.md.us



January 31, 2014

Mr. William Cappe
Maryland State Department of Education
200 West Baltimore Street
Baltimore, Maryland 21201

Dear Mr. Cappe,

The Talbot County Board of Education strongly supports local autonomy in establishing and recommending the school calendar. We have a calendar committee made up from a wide range of constituent groups that take national, state and local variables into consideration prior to making the best recommendation for our district.

Currently we have transitioned to the common core state standards and adopted the new state assessments. These will require on-going professional development and include a variety of testing mandates for graduation. All of these dates will need to be considered when developing the school calendar for our local community.

Whether school begins before or after Labor Day, this decision should be made in the best interest of students, staff, and our local community by the local school board. We appreciate your support.

Sincerely,

A handwritten signature in black ink, appearing to read 'Kelly L. Griffith'. The signature is fluid and cursive.

Kelly L. Griffith
Interim Superintendent

A handwritten signature in black ink, appearing to read 'Juanita S. Hopkins'. The signature is in a cursive style.

Juanita S. Hopkins, Esq.
Board President



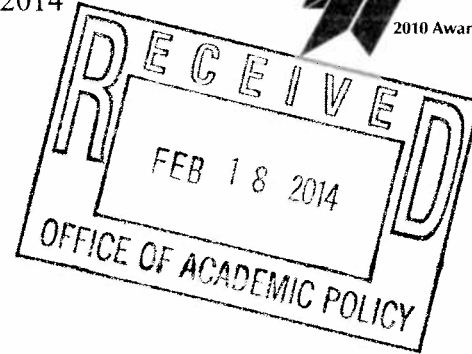
MONTGOMERY COUNTY PUBLIC SCHOOLS
MARYLAND

www.montgomeryschoolsmd.org

February 6, 2014



Malcolm Baldrige
National Quality Award
2010 Award Recipient



Mr. William Cappe, Chair
Task Force to Study a Post-Labor Day
Start Date for Maryland Public Schools
Division of Educator Effectiveness
Maryland State Department of Education
200 West Baltimore Street
Baltimore, Maryland 21201-2595

Dear Mr. Cappe,

We are writing to provide our strong support for the current practice of providing autonomy to local school districts to establish their own school year calendars. We have serious concerns that any recommendation otherwise will infringe on the decision making of local districts to exercise their own judgment on when to open schools—decisions that are contingent on a variety of variables that districts are uniquely positioned to consider. We urge you to recommend the current practice whereby local districts determine their own school calendars.

Each year, Montgomery County Public Schools (MCPS) forms a calendar committee comprising a broad range of stakeholders to consider future-year school year calendars. Our calendar committee takes into consideration a range of factors before making its recommendation to the Board of Education for approval. For the past 12 years, and for many years prior, local preference has been to open schools before Labor Day. This is the local decision that has been made in collaboration with our community and our employee associations. We firmly believe that starting the school year before Labor Day with a full five-day week allows for us to generate instructional momentum at the optimal time for our students, and the feedback from this practice has been overwhelmingly positive from our local community.

Delaying the start of school to after Labor Day will end this practice, and it will push school very late into June. This will impact our summer schools and extended school year programs, as well as our partnerships with organizations, such as summer camps, which provide extracurricular options for students during the summer. We also program for extensive professional development in June, the time we find yields the best results for these activities. Our school schedules have been built around this schedule, and changing them will have a tremendous impact on tens of thousands of families unnecessarily.

Office of the Superintendent of Schools

850 Hungerford Drive, Room 122 ♦ Rockville, Maryland 20850 ♦ 301-279-3381

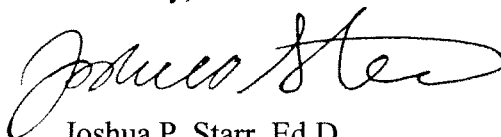
MCPS factors other variables into our local decision making for creating our school calendar. These variables include but are not limited to:

- University partnerships and the start of summer graduate school enrollment
- State and local testing windows
- Local community events
- Creating the best learning environment for students
- Local preference of students, parents, employee associations, and community members

Should the Task Force recommend anything other than the current practice, it will be recommending to end local autonomy to make decisions that we believe are in the best interest of students and that have allowed MCPS to succeed. We ask that you continue the current practice that has worked so well for so long.

Thank you for your support for the students, staff, and families of MCPS.

Sincerely,

A handwritten signature in black ink, appearing to read "Joshua Starr", written in a cursive style.

Joshua P. Starr, Ed.D.
Superintendent of Schools

JPS:sln

BOARD OF EDUCATION OF WICOMICO COUNTY



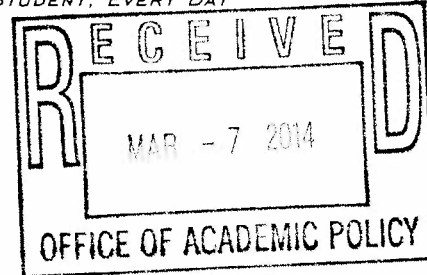
JOHN E. FREDERICKSEN, PH.D.
SUPERINTENDENT OF SCHOOLS

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CAROLYN J. ELMORE, ED.D.
KIMBERLY S. HUDSON



March 4, 2014

William Cappe, Education Program Specialist
Maryland Department of Education
200 West Baltimore Street
Baltimore MD 21201

RE: Post-Labor Day School Start

Dear Mr. Cappe:

Thank you for the opportunity to respond to the request that the State of Maryland statutorily require schools to open after Labor Day. Currently, schools may start before or after Labor Day, based on local decision-making for the best results for student achievement. I support continuing to make this a local decision to allow those closest to their students to make the decision on when to start school in the autumn based on student success, faculty effectiveness, and family needs.

Our students tend to respond the best when we can create the best environment for their learning. It also helps us to address local and state assessment procedures to make sure that the students are ready to do their best to compete with other students in their age cohorts across Maryland and America. We take everything available into consideration when making this decision such as: what our families prefer, faculty training needs (and professional development/training/evaluation plans), and any anticipated facility changes such as construction, refitting, and major renovations. Wicomico County is the source of the greatest agricultural commerce (by aggregate sales) in Maryland as well as having one of the most urban profiles (for our Salisbury metropolitan area), creating an added incentive for us to listen closely to our customers. By being responsive to our faculties and families, we boost attendance, increase the focus on learning, and build stronger bonds between families and our school teachers. We also consider weather issues, as several of our buildings lack air-conditioning and we seek to strike a balance that avoids the hottest weather.

Thank you for the opportunity to provide input on this topic. Please know that you're welcome to contact us if you have additional information needs.

Respectfully,

A handwritten signature in black ink, appearing to read 'John E. Fredericksen'.

John E. Fredericksen, Ph.D.
Superintendent



Fiscal Year | **2013**



**TOURISM DEVELOPMENT
ANNUAL REPORT**

DEAR TOURISM INDUSTRY PARTNERS:

Pursuant to Section 5 of Chapter 471 Acts of 1997 (HB 685), I am pleased to present the Fiscal Year 2013 Maryland Tourism Development – Fund Annual Report (Annual Report).

Each year, the Maryland Tourism Development Board (Board) and the Department of Business and Economic Development (Department) report on the impact the travel and tourism industry has on Maryland's economy. As someone who has been involved in the Maryland tourism industry for more than 20 years, I know firsthand the economic impact visitors have on my bottom line.

This year's annual report highlights the economic impact of Maryland's tourism industry from the recently released *Economic Impact of Tourism in Maryland – Calendar Year 2012 Tourism Satellite Account* report from Tourism Economics, a leading tourism industry research firm. The Tourism Satellite Account reported more than **\$14.9 billion** in visitor spending and more than **\$2 billion** in State and local taxes.

Economic Impact and Advertising Effectiveness are generally reported by **calendar year**; all other metrics in the Annual Report are Fiscal Year 2013 (July 2012-June 2013).

Another measurement highlighted in the Annual Report is the sales tax code performance formula, a direct result of the passage of the Tourism Promotion Act of 2008. Eight key tourism tax codes are tracked, reported and considered in calculating future tourism budgets. Comparisons, by county, of Fiscal Year 2012 and Fiscal Year 2013 codes are included in this report. The Board is also now mandated to submit a report, in cooperation with the Maryland Association of Destination Marketing Organizations (MDMO), on the effectiveness of mandatory funding and the passage of the Tourism Promotion Act in increasing visitor attendance and visitor spending in Maryland. We've included the content of that report in this Annual Report, and will continue to do so in the future.

While the results of a Tourism Satellite Account are only available on an annual basis, many performance metrics—including the tourism tax codes, are available on a more frequent basis. Recognizing the importance of more timely information, the Department's Office of Tourism Development (OTD) distributes an electronic *Tourism Monitor*, which reports tourism trends and key performance metrics on a monthly basis. Included in the Annual Report is a year-end recap of the *Tourism Monitor*, including the metrics tracked in the Department of Budget & Management's Managing for Results (MFR) program and the StateStat performance reporting system.

As a small business owner, I scrutinize every aspect of business with an eye toward return on investment. In order to ensure that we were being the most effective steward of the Maryland Tourism Development Board Fund, the Board commissioned a leading market research company that specializes in tourism advertising effectiveness studies, Strategic Marketing and Research, Inc. (SMARI), to measure the recognition and effectiveness of OTD's 2012 advertising placements. SMARI found that OTD's return on invested advertising dollar compared favorably to other state studies; you'll find further details on this study in the Annual Report. **I am pleased to report that the efforts of the OTD in 2012 delivered a powerful return on investment of \$4.79 in State sales tax for every dollar invested in tourism funding.**

I am proud of the work of the Board and the OTD, and the positive impact that the tourism industry has on our State and its citizens.

Sincerely,

GREG SHOCKLEY CHAIR > *Maryland Tourism Development Board*
OWNER > *Shenanigan's Irish Pub, Ocean City*

TOURISM: A REVENUE GENERATOR

THE TRAVEL AND TOURISM ECONOMY AND ITS IMPACT IN MARYLAND

Measuring the tourism industry is somewhat difficult, as the industry is not measured in standard economic accounting systems. Most industries are accounted via the supply-side: businesses are categorized into North American Industry Classification System (NAICS) codes and surveyed about jobs, revenues and costs.

But tourism is a demand-side activity: the focus is on what the traveler buys before and during a trip. As a result, tourism touches many industries.

This year's Annual Report reflects the data collected by a Tourism Satellite Account (TSA) -- the emerging industry standard now being used by other progressive and competitive states, as well as the U.S. Travel Association.

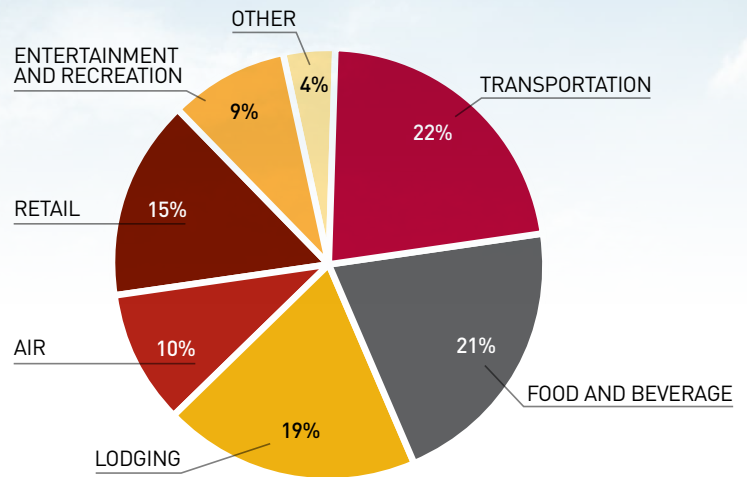
A TSA provides measurements of tourism that are designed to be consistent with the System of National Accounts, which facilitates inter-industry comparisons. It also includes a wider view of tourism demand, such as second home activity, capital investment, and government spending -- not just visitor spending. This broader measurement is referred to as the tourism economy. The latest TSA conducted by Tourism Economics, an Oxford Economics company, reported that Maryland's total tourism economy generated \$15.9 billion in 2012.

While this broader definition is important to track from a comparability standpoint, the key industry statistics will focus on visitor spending -- the spending in Maryland by visitors on travel purchases, and will not include capital investment or government spending.

\$14.9 BILLION IN VISITOR SPENDING IN 2012

Maryland tourists and travelers spent \$14.9 billion on travel expenses in 2012. Local transportation, food and beverage, and lodging each represent about 20 percent of tourism industry sales. Retail closely follows, representing 15 percent of direct industry sales. Total spending increased 4.5 percent over 2011. Visitor spending has grown by more than four percent for three straight years -- and expanded more than 17 percent since the recession.

VISITOR SPENDING CATEGORIES



Economic Impact Study: Tourism Economics

MORE THAN 135,000 DIRECT TOURISM JOBS WITH A PAYROLL OF \$4.5 BILLION

Tourism is the 10th largest private sector employer in the State, supporting 135,741 direct full-time equivalency jobs in 2012 in leisure and hospitality, retail, transportation, and other sectors impacted by visitor spending. For these employees, tourism jobs provided \$4.5 billion in wages and salaries in 2012.

VISITOR SPENDING IS AN IMPORTANT REVENUE GENERATOR FOR STATE AND LOCAL GOVERNMENTS

In 2012, visitor spending generated more than \$2 billion in State and local taxes, including income taxes from the wages of industry employees, sales taxes for tourism goods and services, hotel occupancy taxes, property taxes, and other corporate taxes.

VISITOR SPENDING (IN MILLIONS)

	2010	2011	2012	% CHANGE 2011-12
TRANSPORTATION	\$2,789.6	\$3,174.6	\$3,317.8	4.5%
FOOD & BEVERAGE	\$2,755.7	\$2,856.3	\$3,063.3	7.2%
LODGING	\$2,616.7	\$2,721.2	\$2,888.6	6.2%
RETAIL	\$1,934.8	\$2,083.8	\$2,201.1	5.6%
AIR	\$1,439.0	\$1,533.3	\$1,536.3	0.2%
ENTERTAINMENT AND RECREATION	\$1,117.0	\$1,206.4	\$1,271.7	5.4%
OTHER	\$608.1	\$672.0	\$629.4	(6.3%)
TOTAL	\$13,261.0	\$14,247.5	\$14,908.4	4.6%
PERCENT CHANGE	4.4%	7.4%	4.6%	

OFFICE OF TOURISM DEVELOPMENT PERFORMANCE MEASUREMENTS

The performance of the OTD is tracked against a variety of different measures, through the Department of Budget & Management's Managing for Results (MFR) system as well as StateStat. ➦ One of OTD's key goals is to influence prospective visitors in targeted markets to plan a trip to Maryland. Marketing activities are then developed with the objective of increasing Web visits and quality leads for potential visitors. ➦ All performance measures were estimated to decline in Fiscal Year 2013, given that there was no special event planned on the magnitude of the Fiscal Year 2012 Star-Spangled Sailabration War of 1812 Bicentennial launch event. Only two of these measures saw a decline from Fiscal Year 2012, and all three performance measures were up significantly from Fiscal Year 2011 results: unique web visitors were up 28 percent; advertising-generated inquiries were up 37 percent; and travel media exposure was up 43 percent. This positive performance was thanks in part to the Federal Scenic Byways reimbursable funds that have been allocated to online, print and television advertising in fiscal years 2012 and 2013. OTD will utilize the last of these grant funds in Fiscal Year 2014. Unfortunately, this federal funding source is no longer available.

THREE PERFORMANCE METRICS ARE TRACKED AGAINST THIS OBJECTIVE:

NUMBER OF UNIQUE WEB VISITORS

OTD increased its online advertising budget 17 percent to offset the expected decline in FY 2013 performance measures, after the high volumes driven by Sailabration. In FY 2013, the number of unique web visitors to VisitMaryland.org grew 9 percent; the overall decline in unique web visitors was driven by a reduction of 420,000 in traffic to War of 1812/Sailabration websites.

	FY 2011	FY 2012	FY 2013	%CHANGE 2012-13
VISITMARYLAND.ORG	1,371,930	1,527,389	1,665,713	9.0%
VISITMD.MOBI MOBILE SITE		118,486	45,762	(61.4%)
1812/SAILABRATION WEB SITE(S)	17,706	495,269	67,499	(86.4%)
TOTAL TRAFFIC TO ALL WEBSITES	1,389,636	2,141,144	1,778,974	(16.9%)
ONLINE ADVERTISING BUDGET	\$457,140	\$488,677	\$572,925	17.2%

Google Analytics data

ADVERTISING-GENERATED INQUIRIES

OTD receives request for travel kits in response to print, radio, outdoor, electronic and TV advertising. OTD increased its advertising budget for traditional media (print, radio, outdoor and TV) by 36 percent to offset the expected decline in FY 2013 performance measures, after the high volumes driven by Sailabration. This strategy paid off, with increases in both the number of advertising-generated inquiries from traditional media (up 22.9 percent) and website requests for travel kits (up 43.9 percent.) The advertising budget for traditional media (print, radio, outdoor and TV) increased by 36 percent while overall media spending increased 30.7 percent.

	FY 2011	FY 2012	FY 2013	% CHANGE 2012-13
NUMBER OF ADVERTISING GENERATED INQUIRIES	39,018	44,314	54,460	22.9%
NUMBER OF TRAVEL KITS ORDERED VIA WEBSITE	21,550	19,904	28,649	43.9%
TOTAL NUMBER OF TRAVEL REQUESTS	60,568	64,218	83,109	29.4%
PRINT, RADIO, TV, OUTDOOR AD BUDGET	\$557,405	\$1,244,582	\$1,693,000	36.0%
TOTAL ADVERTISING BUDGET	\$1,014,545	\$1,733,260	\$2,265,925	30.7%

PUBLIC RELATIONS EFFORTS

Public relations activities – press outreach, familiarization tours, and visiting journalists – generated \$13.7 million in advertising value for Maryland tourism products and services. Travel media exposure only declined by \$1.7 million from the previous year – and Sailabration had accounted for more than \$7 million in advertising equivalency in FY 2102.

	FY 2011	FY 2012	FY 2013	% CHANGE 2012-13
TRAVEL MEDIA EXPOSURE	\$9,576,094	\$15,378,375	\$13,696,468	(10.9%)

USING RESEARCH TO ENSURE ADVERTISING EFFECTIVENESS

The OTD strives to make informed decisions regarding advertising placements and expenditures. Following the 2012 Maryland of _____ campaign, the Board commissioned a leading market research company, Strategic Marketing and Research, Inc. (SMARI) to measure the recognition and effectiveness of OTD's 2012 advertising placements. SMARI found that OTD's return on invested advertising dollar compared favorably to other studies – and was, in fact, one of the highest returns on each dollar that they have ever measured compared to other destinations.

The study concluded that OTD-placed advertisements that included the Maryland of _____ images and content generated \$317 million in visitor spending and \$44.4 million in State and local taxes. 265,067 trips to Maryland can be attributed to this campaign. These trips supported 2,925 jobs.

One dollar spent on the Maryland of _____ campaign by the OTD returned \$160 dollars in visitor spending, more than \$22 in State and local revenue, and nearly \$5 in State sales tax revenue.

One new tourism job was supported for every \$680 in OTD advertising.

Given the high return on investment for the Maryland of _____ advertisements, the Board has allocated \$750,000 of the additional \$1 million appropriated to the Board Fund in Fiscal Year 2014 to media buys targeting prospective visitors.

2012 ADVERTISING CAMPAIGN

MEDIA BUDGET	\$1,988,518
INCREMENTAL TRIPS GENERATED	265,067
VISITOR SPENDING	\$317 MILLION
STATE SALES TAX GENERATED	\$9.5 MILLION
STATE/LOCAL TAX GENERATED	\$44.4 MILLION
ADDITIONAL JOBS	2,925
VISITOR SPENDING per ad dollar	\$159.56
STATE SALES TAX REVENUE per ad dollar	\$4.79
STATE AND LOCAL TAX REVENUE per ad dollar	\$22.34

**2,925 NEW JOBS,
EQUALING ONE JOB FOR EVERY \$680 IN ADVERTISING**

MARYLAND'S TOURISM MARKETING WORKS IN ATTRACTING MORE VISITORS

The OTD has been a highly effective steward of the Board marketing funds, particularly during recent budget reductions. In Fiscal Year 2013, the U.S. Travel Association reported that Maryland's tourism budget was \$10.4 million -- \$9.1 million in general funds and \$1.3 million in special and reimbursable funds generated by the Board through advertising sales as well as the Federal Highway Administration Scenic Byways grant award. The amount allocated to domestic advertising and sales promotion was \$2.6 million. The states that compete most heavily with Maryland – which have similar beach, urban, cultural heritage or mountain destinations – have historically had larger advertising and sales promotion budgets and have targeted the same prospective visitors: in Fiscal Year 2013, both Virginia and North Carolina allocated more than \$5.8 million to domestic advertising and sales promotion, in comparison to Maryland's \$2.6 million.

In order to combat this disparity, OTD began to refocus marketing efforts in 2008, targeting the key feeder markets of Washington, D.C., Philadelphia and Baltimore with year-round advertising based on new consumer research that helped crystalize key messaging. The new marketing campaign connected with consumers on an emotional level and aided in Maryland attracting 35.4 million domestic travelers in 2012, an increase of 2.9 percent from 2011 and an increase of 30 percent from 2007's 27.2 million visitors. Maryland saw growth in leisure, as well as both day trips and overnights. Maryland outperformed national trends, and led the region with the largest percent growth in the leisure and overnight segments, according to an annual national survey of U.S. travelers conducted by D.K. Shifflet and Associates, a leading travel industry research firm. In comparison to 2007 visitor volume, Maryland realized more growth than any state in the region, both overall and in the leisure segment.

Maryland's 30 percent increase – representing an additional 8.2 million visitors from 2007 to 2012 – was substantially greater than the 9.2 percent increase the United States saw during that same time period. Maryland's increase in visitation was significantly greater than the performance of other mid-Atlantic states. Maryland has increased market share 19.1 percent since 2007, outperforming national and regional leisure travel trends during this challenging economic climate.

The OTD works closely with the local tourism offices, both individually as well as through the MDMOs, on a variety of product development and marketing programs. New partner marketing and cooperative advertising opportunities were developed in Fiscal Year 2011 in response to the larger grant pool. Working collaboratively with a unified message makes everyone's marketing dollars go further.



TOURISM SALES TAX REVENUES OUTPERFORM OVERALL RETAIL SALES TAX COLLECTIONS

The passage of the Tourism Promotion Act of 2008 enacted a new potential funding source based on the tourism sector's growth year over year. This funding formula provides another quantitative, policy-backed way to report the impact that visitor spending has on sales revenue in Maryland. Eight sales tax codes are tracked and multiplied by a tourism factor – the amount deemed attributable to visitor spending – by the Comptroller. The Board qualifies for additional funding if this tourism tax increment exceeds three percent of the tourism tax revenues from the previous year.

The Bureau of Revenue Estimates reported actual tourism expenditures of \$392 million for FY 2013; after adjusting for the sales tax rate increase on the sale of alcohol, these revenues totaled \$381.4 million. Adjusted tourism revenues increased 1.0 percent, outperforming the growth of overall sales tax categories. Five of the eight performance measures saw increases in FY 2013, with slight decreases in Hotels, Motels Selling Food (with beer, wine and liquor license) by 1.3 percent; Automobile, Bus and Truck Rentals by 3.2 percent; and Airlines-Commercial by 14.3 percent. These three categories are associated more with business travel, and anecdotal evidence from Southern Maryland and Anne Arundel County raises concerns about the impact of sequestration on government travel.

SALES TAX CATEGORY	TOTAL SALES TAX REVENUES (\$)				TAX FACTOR	ADJUSTED TOURISM TAXES (\$)		
	FY 2013 WITH ALCOHOL INCREASE	FY 2013 WITHOUT ALCOHOL INCREASE	FY 2012 WITH ALCOHOL INCREASE	FY 2012 WITHOUT ALCOHOL INCREASE		FY 2013 WITHOUT ALCOHOL INCREASE	FY 2012 WITHOUT ALCOHOL INCREASE	GROWTH WITHOUT ALCOHOL INCREASE
111 HOTELS, MOTELS SELLING FOOD <i>w/BWL</i>	\$42.8	\$41.9	\$43.5	\$42.4	100%	\$41.9	\$42.4	(1.3%)
901 HOTELS, MOTELS, APARTMENTS, COTTAGES	\$91.8	\$91.0	\$89.8	\$88.7	100%	\$91.0	\$88.7	2.5%
108 RESTAURANTS, LUNCHROOMS, DELIS	\$323.7	\$317.1	\$314.9	\$310.3	33%	\$105.7	\$103.4	2.2%
112 RESTAURANTS AND NIGHTCLUBS <i>w/BWL</i>	\$247.0	\$227.4	\$245.9	\$222.3	33%	\$75.8	\$74.1	2.3%
306 GENERAL MERCHANDISE	\$156.6	\$156.2	\$153.7	\$153.4	5%	\$7.8	\$7.7	1.8%
407 AUTOMOBILE, BUS AND TRUCK RENTALS	\$62.4	\$62.4	\$64.4	\$64.4	90%	\$56.2	\$58.0	(3.2%)
706 AIRLINES — COMMERCIAL	\$0.3	\$0.3	\$0.3	\$0.3	50%	\$0.1	\$0.2	(14.3%)
925 RECREATION AND AMUSEMENT PLACES	\$6.1	\$5.9	\$6.0	\$5.9	50%	\$3.0	\$2.9	1.1%
TOURISM TAX CATEGORIES SUBTOTAL	\$930.7	\$902.1	\$918.7	\$887.8		\$381.4	\$377.5	1.0%
ALL SALES TAX CATEGORIES SUBTOTAL	\$4,126.8		\$4,095.7					0.76%

Since FY 2007, sales tax revenues attributable to tourism have grown 31.4 percent, far outperforming the 19.7 percent growth of overall sales tax collections. These tourism revenues now account for more than 9 percent of all sales tax collections.



TOURISM REVENUE GROWTH FAR OUTPACES OVERALL SALES TAX COLLECTIONS

	OVERALL SALES TAX COLLECTIONS	ADJUSTED TOURISM TAX CODES	% OF TOTAL
FY 2007	\$3,447.9 BILLION	\$290.3 MILLION	8.4%
FY 2008	\$3,748.9 BILLION	\$298.2 MILLION	7.95%
FY 2009	\$3,851.8 BILLION	\$346.3 MILLION	8.99%
FY 2010	\$3,761.9 BILLION	\$342.0 MILLION	9.09%
FY 2011	\$3,898.0 BILLION	\$359.5 MILLION	9.22%
FY 2012	\$4,095.7 BILLION*	\$377.5 MILLION	9.22%
FY 2013	\$4,126.9 BILLION*	\$381.4 MILLION	9.24%
% GROWTH FY 07-FY 13	19.7%	31.4%	10%

* Includes alcohol tax increase



Across the State, county to county, no matter the region, visitor spending makes a significant impact. The following chart details actual tourism expenditures for Maryland's 23 counties and Baltimore City, broken out by geographic region.

TOURISM SALES & USE TAX CODES BY COUNTY — ADJUSTED FOR TOURISM FACTOR

COUNTY	FY 2013 TOURISM SALES TAX REVENUE WITH ALCOHOL INCREASE	FY 2012 TOURISM SALES TAX REVENUE WITH ALCOHOL INCREASE	% CHANGE
ALLEGANY	\$3,859,737	\$3,595,947	7.3%
GARRET	3,114,991	2,930,133	6.3%
WASHINGTON	7,179,852	7,329,570	(2.0%)
WESTERN REGION	\$14,154,580	\$13,855,650	2.2%
FREDERICK	11,632,595	11,035,475	5.4%
MONTGOMERY	66,848,893	67,059,516	(0.3%)
PRINCE GEORGE'S	52,408,296	52,268,538	0.3%
CAPITAL REGION	\$130,889,784	\$130,363,529	0.4%
ANNE ARUNDEL	58,424,967	57,437,083	1.7%
BALTIMORE CITY	48,658,337	47,407,142	2.6%
BALTIMORE COUNTY	42,053,485	41,531,480	1.3%
CARROLL	5,315,291	5,242,876	1.4%
HARFORD	9,976,513	10,054,163	(0.8%)
HOWARD	\$16,037,307	15,802,252	1.5%
CENTRAL REGION	\$180,465,900	\$177,474,996	1.7%
CALVERT	2,814,993	3,073,123	(8.4%)
CHARLES	6,988,488	7,058,775	(1.0%)
ST. MARY'S	4,372,429	4,552,976	(4.0%)
SOUTHERN REGION	\$14,175,910	\$14,684,874	(3.5%)
CAROLINE	\$566,678	\$572,415	(1.0%)
CECIL	\$3,735,045	\$3,825,334	(2.4%)
DORCHESTER	\$2,752,924	\$2,962,648	(7.1%)
KENT	\$886,202	\$888,454	(0.3%)
QUEEN ANNE'S	\$2,569,058	\$2,458,920	4.5%
SOMERSET	\$376,551	\$358,056	5.2%
TALBOT	\$4,048,525	\$3,946,045	2.6%
WICOMICO	\$5,263,089	\$5,334,838	(1.3%)
WORCESTER	\$24,474,031	\$23,719,185	3.2%
EASTERN SHORE	\$44,672,103	\$44,065,895	1.4%

DEPARTMENT OF BUSINESS & ECONOMIC DEVELOPMENT

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MARGOT A. AMELIA, Executive Director of the Office of Tourism