OMEGA

OHIO MID-EASTERN GOVERNMENTS ASSOCIATION

2017

Comprehensive Economic Development Strategy Report

OMEGA
OHIO MID-EASTERN GOVERNMENTS ASSOCIATION

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Officers and Director

L to R: Mayor of Steubenville, Domenick Mucci – Vice President; Chief of Staff, Ohio Development Services Agency, Andrew Pusateri (keynote speaker at OMEGA meeting); OMEGA Executive Director, Jeannette Wierzbicki, P.E.; Tuscarawas County Commissioner, Chris Abbuhl – Secretary; Executive Director of the Coshocton County Port Authority, Dorothy Skowrunski – Treasurer; Holmes County Commissioner, Ray Eyler – President; and Director of the Governor's Office of Appalachia, Jason Wilson (special guest at OMEGA meeting)

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2017 Executive Board Members

J.P. Dutton	Commissioner	Belmont County
Robert Krajnyak	Mayor	City of Martins Ferry
Jeff Ohler	Commissioner	Carroll County
Mike Halleck	Commissioner	Columbiana County
Ryan Stovall	Mayor	City of East Liverpool
John C. Berlin	Mayor	City of Salem
Tiffany Swigert	Port Authority Director	Coshocton County
Steve Mercer	Mayor	City of Coshocton
Skip Gardner	Commissioner	Guernsey County
Dale Norris	Commissioner	Harrison County
Ray Eyler	Commissioner	Holmes County
Evan Scurti	Port Authority Director	Jefferson County
Domenick Mucci	Mayor	City of Steubenville
John Parker	Mayor	City of Toronto
Mollie Crooks	Commissioner	Muskingum County
Jeff Tilton	Mayor	City of Zanesville
Chris Abbuhl	Commissioner	Tuscarawas County
Richard Homrighausen	Mayor	City of Dover
Joel B. Day	Mayor	City of New Philadelphia
Rick Dorland	Mayor	City of Uhrichsville

Comprehensive Economic Development Strategy (CEDS)

Committee Members

Tait Carter, Director	Economic Development Office	Carroll County
James Kacsmar, CPA	Kacsmar & Company	Belmont County
Mike Mancuso, Director	Salem Area Sustainable Opportunity Development Center	Columbiana County
Brian Kennedy	Port Authority & Business Owner	Columbiana County
Heinz Stucki, PhD	Professor and Retired Community Improvement Corporation Director	Coshocton County
Norm Blanchard, Director	Cambridge-Guernsey County Community Improvement Corporation	Guernsey County
Nick Homrighausen Director	Economic Development Office	Harrison County
Arnold Oliver, Director	Planning Commission	Holmes County
Evan Scurti, Director	Port Authority	Jefferson County
Anthony Adornetto Executive Director	Zane State College Institutional Advancement	Muskingum County
Jason Ricker	Economic Development and Finance Alliance	Tuscarawas County
Bill Beisel, Director	Kent State University at Tuscarawas Business and Community Services	Tuscarawas County

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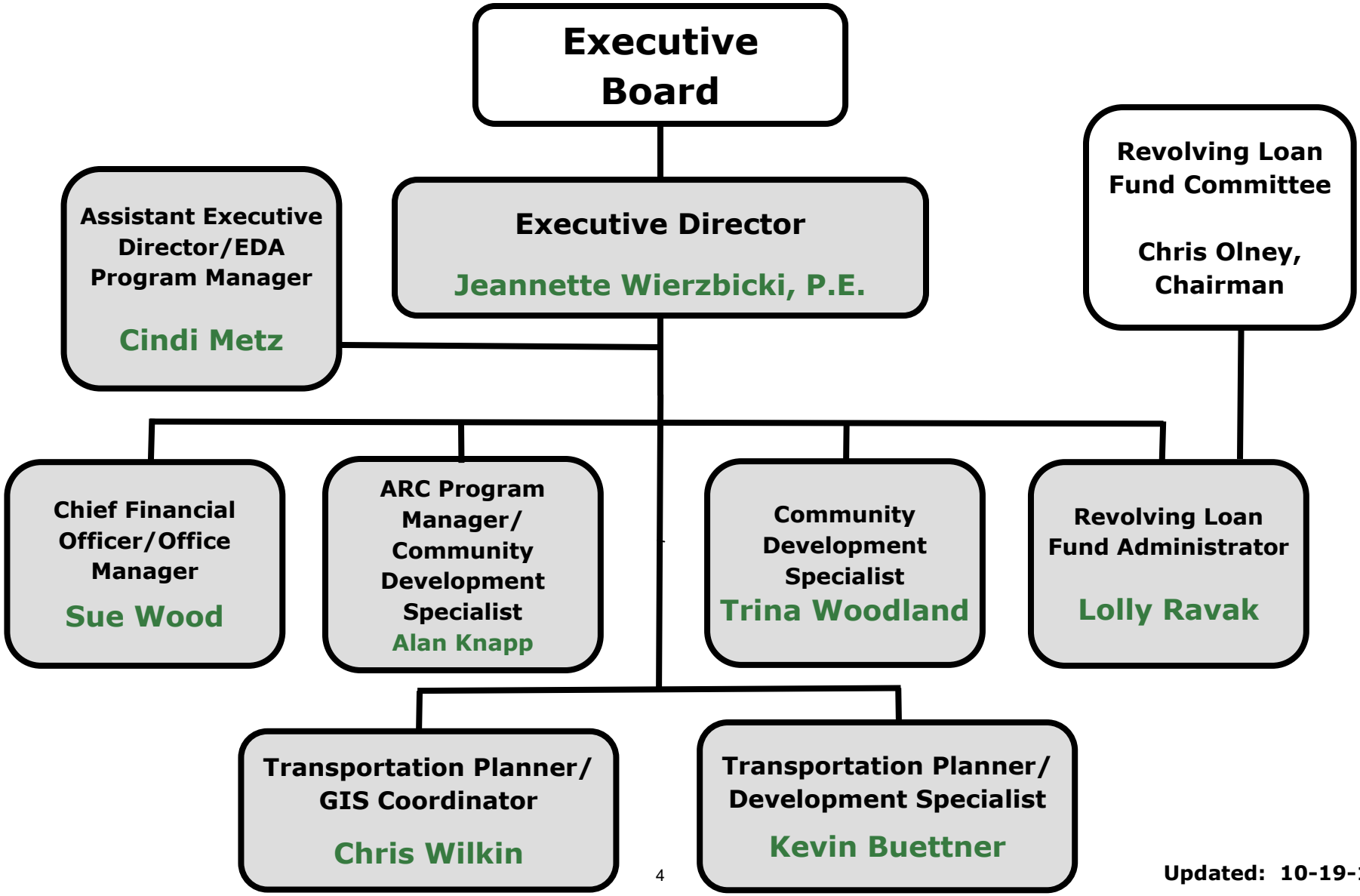

Updated: 10-19-17

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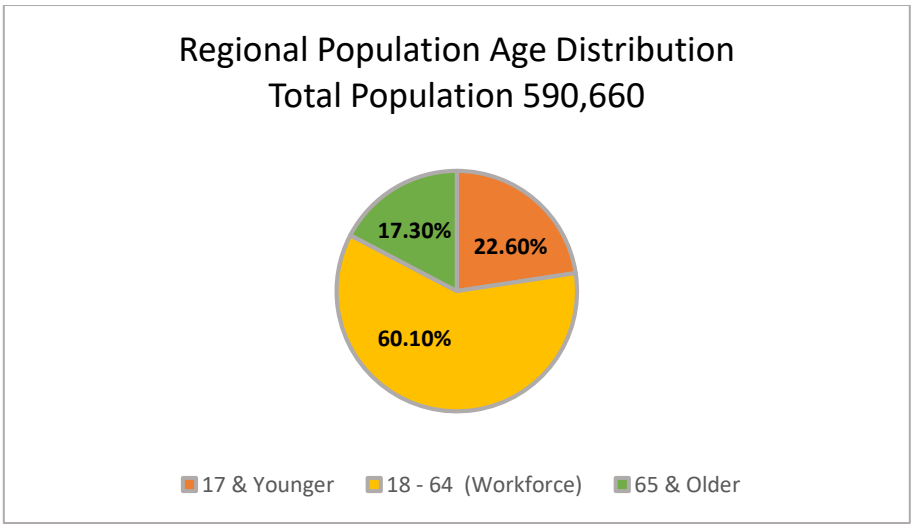
OMEGA is a collaborative body of member governments that serves as a facilitator between state and federal government agencies and local entities to provide opportunities in economic and community development through networking, education, planning, research, and allocation of resources.

Counties served: Belmont, Carroll, Columbiana, Coshocton, Guernsey, Harrison, Holmes, Jefferson, Muskingum, & Tuscarawas.



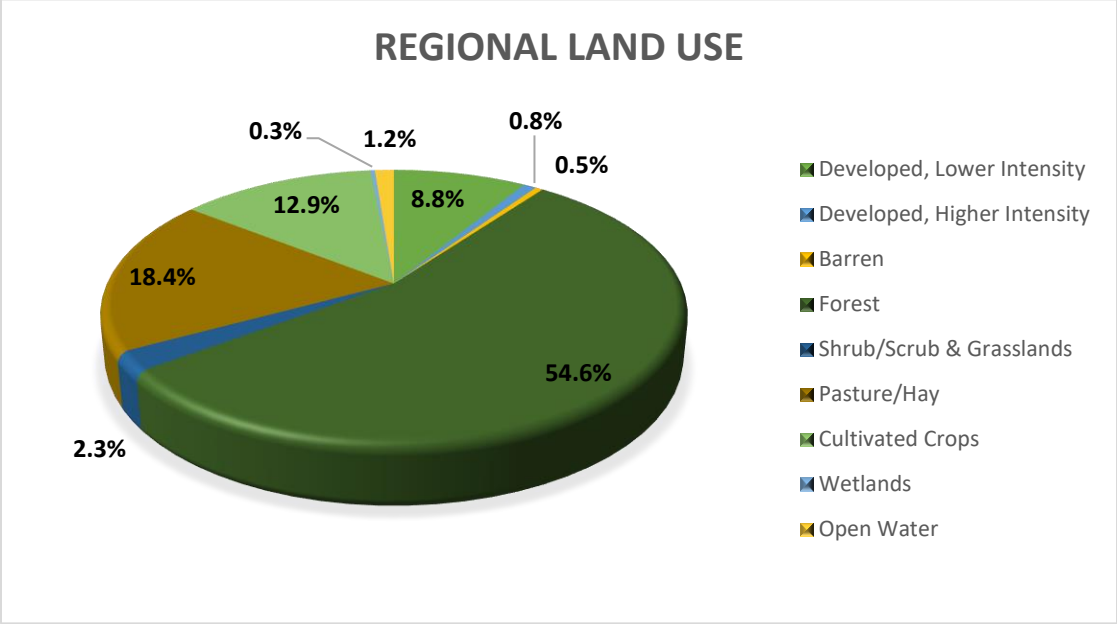
OMEGA serves just over a half million people residing in the 10-county region. The age distribution of these residents is depicted on the left. The average regional per capita income is **77.4%** of the national average.

U.S. Decennial Census (2010)

Land Use

Over one-half (54.5%) of the OMEGA region is covered by forest. Pastured land and cultivated crops are also two significant land uses/covers at 18.4% and 12.9%; respectively. Just under 10% of the total region is developed. The development rate for the state is 14.7%. The predominantly rural nature of the OMEGA region often presents challenges when considering infrastructure for new and/or improved utilities due to the vast open areas between entities being served or targeted for service.

Regional Land Use											
		Developed, Lower Intensity	Developed, Higher Intensity	Barren	Forest	Shrub/Scrub & Grasslands	Pasture/Hay	Cultivated Crops	Wetlands	Open Water	Total Acres
Belmont	Acres	29,195	3,611	3,679	198,208	12,036	72,557	20,082	481	4,023	343,872
	Percentage	*8.5%*	*1.1%*	*1.1%*	*57.6%*	*3.5%*	*21.1%*	*5.8%*	*0.1%*	*1.2%*	
Carroll	Acres	16,874	758	278	140,172	5,684	49,536	35,138	733	3,461	252,608
	Percentage	*7.0%*	*0.0%*	*0.0%*	*55.0%*	*2.0%*	*20.0%*	*14.0%*	*0.0%*	*1.0%*	
Columbiana	Acres	43,452	4,260	1,295	149,918	7,089	66,354	64,070	1,227	3,067	340,800
	Percentage	*13.0%*	*1.0%*	*0.0%*	*44.0%*	*2.0%*	*19.0%*	*19.0%*	*0.0%*	*1.0%*	
Coshocton	Acres	26,138	1,913	1,191	199,394	3,430	64,623	57,764	2,130	4,404	361,024
	Percentage	*7.2%*	*0.5%*	*0.3%*	*55.2%*	*1.0%*	*17.9%*	*16.0%*	*0.6%*	*1.2%*	
Guernsey	Acres	29,332	1,971	735	209,502	7,517	47,072	31,838	935	5,178	334,080
	Percentage	*8.8%*	*0.6%*	*0.2%*	*62.7%*	*2.3%*	*14.1%*	*9.5%*	*0.3%*	*1.6%*	
Harrison	Acres	17,745	672	2,712	161,259	7,982	41,871	19,967	723	5,373	258,304
	Percentage	*6.9%*	*0.3%*	*1.1%*	*62.4%*	*3.1%*	*16.2%*	*7.7%*	*0.3%*	*2.1%*	
Holmes	Acres	19,600	1,597	352	101,791	2,734	69,115	72,742	1,462	1,354	270,720
	Percentage	*7.2%*	*0.6%*	*0.1%*	*37.6%*	*1.0%*	*25.5%*	*26.9%*	*0.5%*	*0.5%*	
Jefferson	Acres	26,975	4,535	2,045	169,371	5,898	31,746	18,481	157	2,884	262,144
	Percentage	*10.3%*	*1.7%*	*0.8%*	*64.6%*	*2.3%*	*12.1%*	*7.1%*	*0.1%*	1.1%	
Muskingum	Acres	38,366	4,211	1,616	231,812	15,312	93,703	33,347	851	6,082	425,344
	Percentage	*9.0%*	*1.0%*	*0.4%*	*54.5%*	*3.6%*	*22.0%*	*7.8%*	*0.2%*	*1.4%*	
Tuscarawas	Acres	35,091	5,849	3,415	189,733	9,045	59,030	53,363	2,797	4,940	363,264
	Percentage	*9.7%*	*1.6%*	*0.9%*	*52.2%*	*2.5%*	*16.3%*	*14.7%*	*0.8%*	*1.4%*	
Region	Acres	282,769	29,377	17,319	1,751,159	76,727	595,607	406,793	11,497	40,767	3,212,160
	Percentage	*8.8%*	*0.8%*	*0.5%*	*54.6%*	*2.3%*	*18.4%*	*12.9%*	*0.3%*	*1.2%*	
Ohio	Acres	3,229,031	618,548	60,282	8,098,786	563,508	2,862,095	10,242,737	248,992	283,064	26,209,664
	Percentage	*12.3%*	*2.4%*	*0.2%*	*30.9%*	*2.2%*	*10.9%*	*39.1%*	*1.0%*	*1.1%*	



Source: Ohio Development Services Agency

Population

The population of the OMEGA region as of the most recent U.S. Decennial Census (2010) was **590,660**. Population has decreased slightly (**-0.30%**) between 2010 and 2016. The regional population is projected to remain relatively flat or decline slightly by 2040. The regional average minority population is 5.3% compared to 8.6% for the Appalachian Ohio Region and 19.7% for the state of Ohio.

Population Change 2010 - 2016				
	Census 2010	Census Est. 2016	Net Change 2010-2016	Annualized % Change 2010 - 2016
Ohio	11,536,504	11,614,373	77,869	0.11%
OMEGA	590,660	580,127	-10,533	-0.30%
Belmont	70,400	68,673	-1,727	-0.40%
Carroll	28,836	27,669	-1,167	-0.66%
Columbiana	107,841	103,685	-4,156	-0.63%
Coshocton	36,901	36,602	-299	-0.13%
Guernsey	40,087	39,063	-1,024	-0.41%
Harrison	15,864	15,307	-557	-0.57%
Holmes	42,366	43,936	1,570	0.58%
Jefferson	69,709	66,704	-3,005	-0.70%
Muskingum	86,074	86,068	-6	0.00%
Tuscarawas	92,582	92,420	-162	-0.03%

Holmes County is the only county in the OMEGA region that experienced annualized population growth from **2010** to **2016**; at a minimal rate of **0.58%**. On average, the ten-county region decreased in population by **-0.30%** with Jefferson County experiencing the largest decrease of **-0.70%**.

Projected Region Population 2015 - 2040							
	2015	2020	2025	2030	2035	2040	% Chg '15 -'40
Ohio	11,549,120	11,574,870	11,598,670	11,615,100	11,635,100	11,679,010	1.11%
OMEGA	586,720	582,160	578,000	573,940	571,450	572,200	-2.54%
Belmont	69,760	68,880	68,270	67,330	66,530	66,140	-5.47%
Carroll	28,810	28,770	28,750	28,720	28,790	29,040	0.79%
Columbiana	106,660	105,380	104,370	103,870	103,890	104,710	-1.86%
Coshocton	36,650	36,190	35,660	34,790	34,070	33,390	-9.76%
Guernsey	39,480	38,750	38,000	37,310	36,680	36,390	-8.49%
Harrison	15,660	15,300	15,210	15,100	15,050	15,100	-3.71%
Holmes	43,610	44,620	45,230	45,700	45,620	45,280	3.69%
Jefferson	67,780	66,540	65,580	65,330	65,820	67,410	-0.55%
Muskingum	85,790	85,420	84,870	83,900	82,810	81,900	-4.75%
Tuscarawas	92,520	92,310	92,060	91,890	92,190	92,840	0.34%

Based on the annualized data from the U.S. Census Bureau for projected population for **2020** through **2040**, three counties in the OMEGA region are projected to experience growth; Holmes County at **3.69%**, Carroll County at **0.80%**, and Tuscarawas County at **0.35%**. The remaining seven counties are projected to lose population over this time period with Coshocton County having the highest projected rate of **-9.76%**. The projected rate of loss for Guernsey County is also concerning at **-8.49%**.

Employers

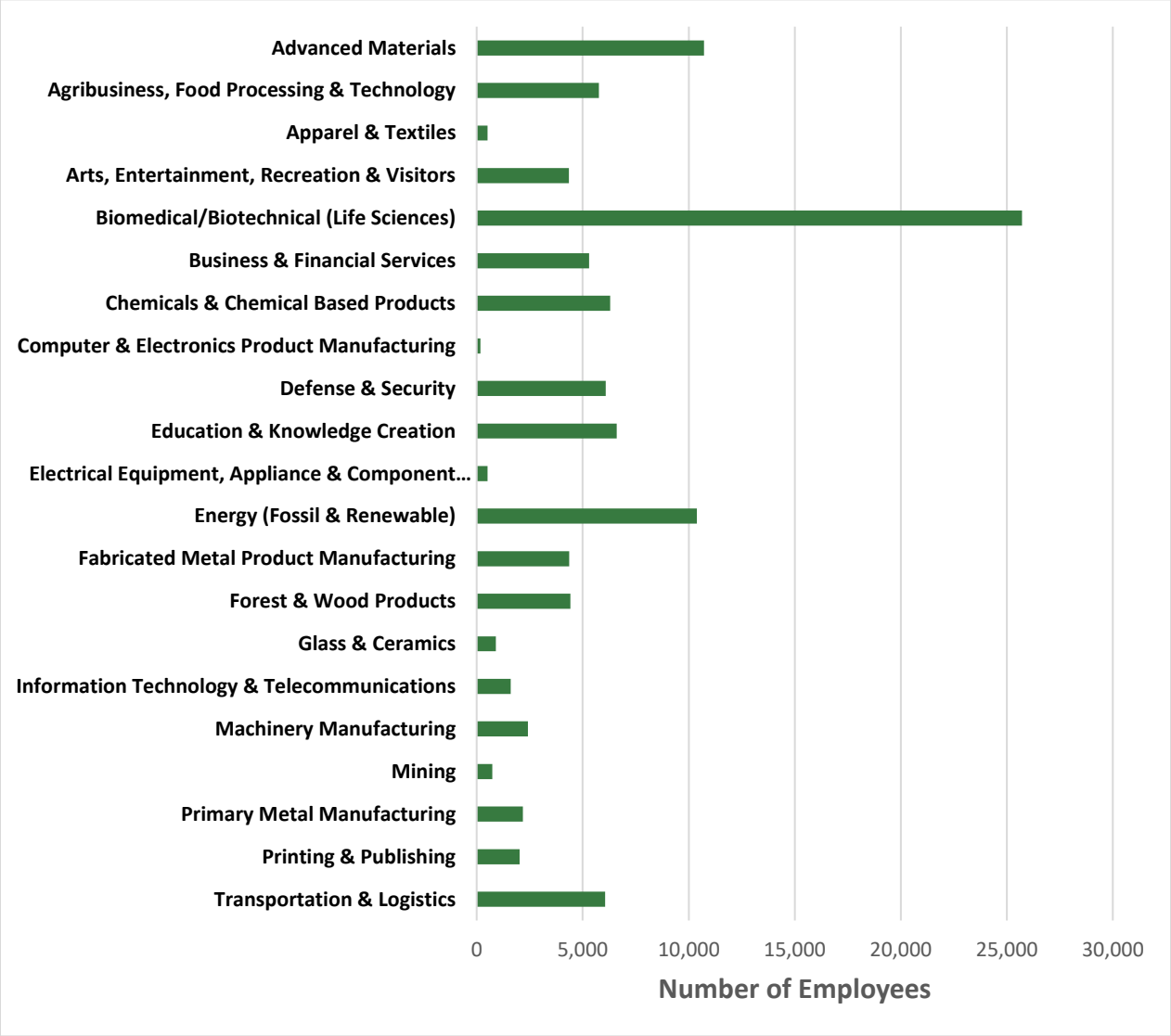
The top three employers in all of the ten counties in the OMEGA region are: **Manufacturing**, **Government**, and **Services**.

Manufacturing is the top employer in 6 of the 10 OMEGA counties. This includes manufacturing of metals, plastics, wood, ceramics and food.

Government includes city and county governments and school districts. The major **Service** employers are typically hospitals and nursing care facilities.

Utility companies are also a notable employer in the OMEGA region. Included among them are American Electric Power in Coshocton County and First Energy in Jefferson County.

Industry Clusters



Source: www.statsamerica/innovation

Note – Biomedical/Biotechnical (Life Sciences) includes hospitals and other health care facilities

Workforce

Regional Civilian Labor Force			
	2014	2015	2016
Civilian Labor Force	273,700	273,200	270,100
Employment	256,400	257,700	253,200
Unemployment	17,300	16,000	16,900
Unemployment Rate	6.3%	5.9%	6.3%

Source: OhioLMI.com – Ohio Labor Market Information

From 2014 to 2016, regional unemployment rates ranged between **0.90% to 1.3% above** the state average of **5.0%**.

County Labor Force Trends		
2016 Bureau of Labor Statistics	5-Year % Change	10-Year % Change
State of Ohio	-1.0%	-3.9%
Belmont	-4.7%	-6.1%
Carroll	-5.1%	-4.6%
Columbiana	-6.9%	-9.8%
Coshocton	-10.9%	-15.1%
Guernsey	2.0%	-5.0%
Harrison	-0.2%	-6.0%
Holmes	7.0%	7.8%
Jefferson	-10.0%	-9.3%
Muskingum	-4.7%	0.2%
Tuscarawas	-0.9%	-6.6%

Source: StatsAmerica.org/USCP

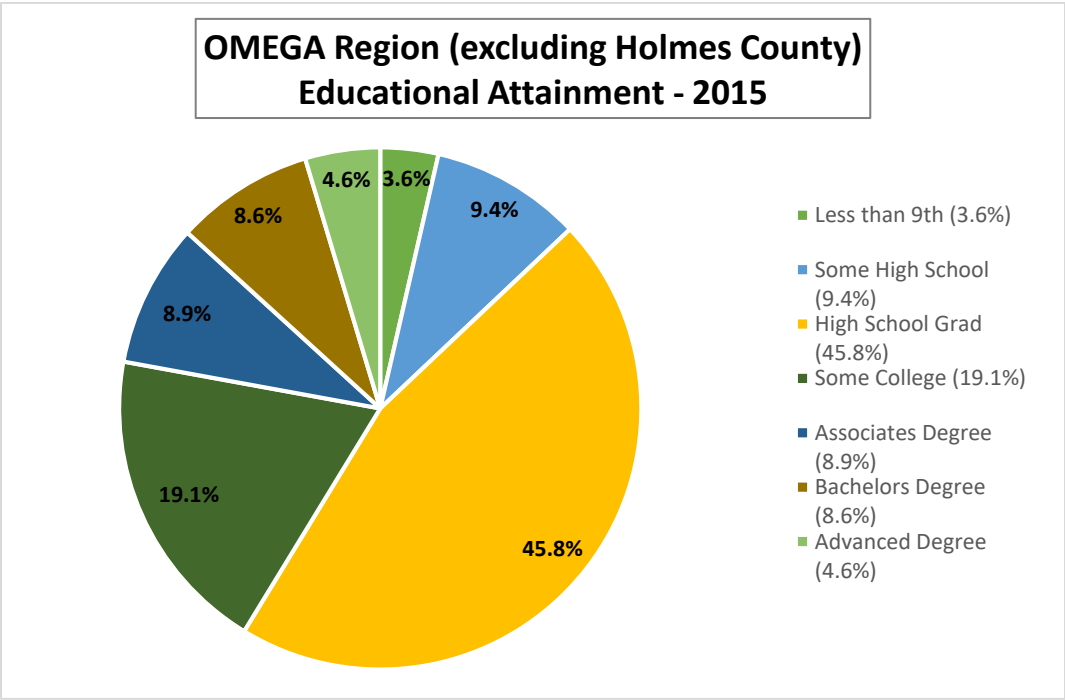
Over the last 10 years, county labor force figures have trended downward; however, in most cases the decline has slowed over the most recent 5-year period. Possible contributing factors to the 10-year rate of change are the **2008-2011 recession** and **decline in the coal industry** in the region. The slowing decline is most likely related to **increasing oil and gas industry exploration and extraction activities** in the region, as well as the **overall economic recovery taking place in the United States** following the recession of 2008 – 2011. The positive 5 and 10-year labor force trends in Holmes County are most likely due to the predominate Amish population.

Education

The OMEGA region has a wealth of educational resources, including all or part of **57** school districts and **7** colleges. According to U.S. Census Bureau 2015 Educational Attainment information, the OMEGA region exceeded the state rates of high school graduates and individuals with associates degrees, but lags behind in bachelors and advanced degrees.

Regional Educational Attainment							
	Less than 9th Grade	9th -12th No Diploma	High School Diploma	Some College No Degree	Associates Degree	Bachelors Degree	Advanced Degree
Belmont	2.4%	8.1%	43.5%	20.9%	10.0%	9.4%	5.7%
Carroll	3.9%	9.1%	47.5%	20.7%	7.4%	6.7%	4.7%
Columbiana	2.8%	10.1%	46.5%	18.2%	8.5%	9.5%	4.4%
Coshocton	5.3%	9.7%	50.3%	15.6%	7.0%	8.5%	3.6%
Guernsey	3.5%	11.4%	43.1%	19.3%	9.3%	8.5%	4.9%
Harrison	3.6%	9.4%	48.7%	19.6%	10.1%	5.4%	3.2%
Holmes	34.8%	7.5%	35.1%	10.4%	4.4%	5.3%	2.5%
Jefferson	3.1%	6.8%	42.5%	20.5%	12.0%	9.6%	5.6%
Muskingum	2.8%	10.5%	42.9%	20.1%	8.6%	9.8%	5.2%
Tuscarawas	4.9%	9.2%	46.9%	17.4%	7.1%	9.9%	4.5%
Average - Excluding Holmes County	3.6%	9.4%	45.8%	19.1%	8.9%	8.6%	4.6%
State of Ohio	3.1%	7.8%	34.1%	20.7%	8.2%	16.4%	9.7%
Source: U.S. Census Bureau, American Community Survey, 5-Year Estimates							

For the chart below, Holmes County has been removed from the average due to the relatively high percentage of individuals with less than a ninth grade education (34.8%). This statistic is attributed to the Amish population. Including this figure would have significantly skewed the regional statistics depicted below. Holmes County has the highest percentage of Amish of any county in the United States at 42%. Experts speculate that within 15 years Holmes County may be the first majority Amish county.



Housing

Housing in the OMEGA region has recently become a concern as increasing oil and gas industry exploration and extraction activities brought many new residents (temporary and permanent) to the region. In 2017, a large number of these new residents were related to pipeline construction activities. This concern was anticipated due to the impact witnessed by other areas of the country experiencing natural resource booms. Historically, similar activities have led to housing hardships for existing low and moderate income residents as they are often forced out of existing housing by tenants able to pay a higher rate to occupy the housing units. **In 2015, the occupancy rate for housing units (owner and renter occupied) was 88%.**

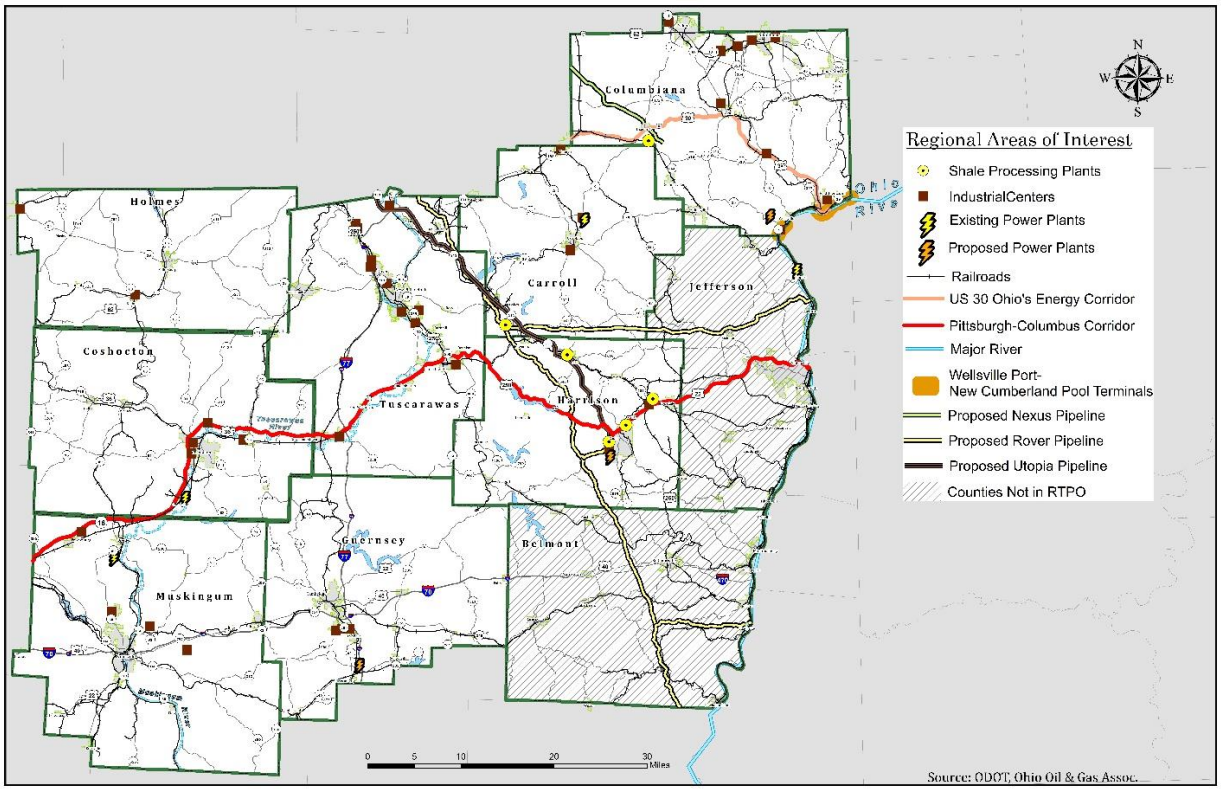
Regional Housing Information - 2015					
	Housing Units	Occupied	Owner Occupied	Renter Occupied	Vacant
Belmont	32,220	27,935	20,719	7,216	4,285
Carroll	13,610	10,972	8,593	2,379	2,638
Columbiana	46,777	42,087	29,930	12,157	4,690
Coshocton	16,408	14,335	10,672	3,663	2,073
Guernsey	19,091	15,558	11,363	4,195	3,533
Harrison	8,115	6,271	4,994	1,277	1,844
Holmes	13,607	12,685	9,661	3,024	922
Jefferson	32,604	27,958	19,796	8,162	4,646
Muskingum	37,854	34,261	22,899	11,362	3,593
Tuscarawas	40,007	36,713	25,852	10,893	3,294
Region	260,293	228,807	164,479	64,328	31,518
Source: U.S. Census Bureau - impacted by seasonal and recreational use - margin of error +/- .0001					

Many RV parks similar to the one pictured to the left have been established in eastern Ohio to meet the growing demand for housing associated with the oil and gas industry. This concept helps avoid the building of permanent structures that are often abandoned when the demand for housing declines with the natural resource-based industry.

Transportation

The OMEGA region has multiple modes of transportation contributing to the regional and state economy, including highway, rail, maritime, and limited public transportation. The district contains **10,350 lane miles of roadway**, **1,261 miles of railroad**, **70 miles of Ohio River frontage**, and **6 transit agencies**. Over **65%** of workers in the region travel **less than 30 minutes** to their place of employment. Less than **8%** travel **more than one hour**.

In July 2013, Ohio Mid-Eastern Governments Association became one of the five non-MPO (Metropolitan Planning Organization) regional councils in Ohio taking part in a two year pilot program to establish Regional Transportation Planning Organizations (RTPOs) in Ohio. The purpose of this pilot program was to provide the rural areas of Ohio, that are not within the service boundaries of an MPO, a method by which to provide meaningful input to transportation planning activities taking place in Ohio. The pilot program was successfully completed in June 2015.



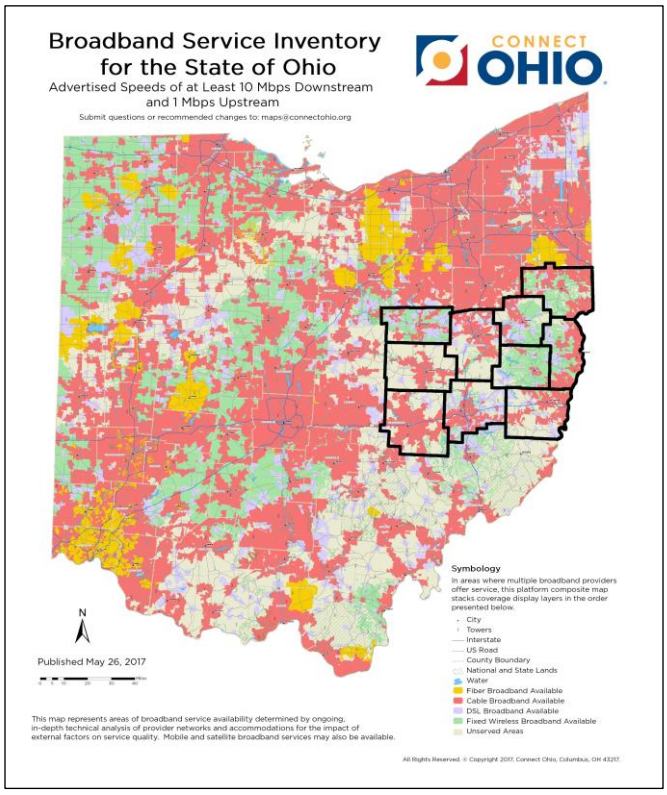
On January 27, 2016, Governor John Kasich formally designated OMEGA as an RTPO, along with four other partner organizations, pursuant to United States Code, Title 23, Section 135(m). This designation covers the Ohio counties of Carroll, Columbiana, Coshocton, Guernsey, Harrison, Holmes, Muskingum, and Tuscarawas. This RTPO designation provides for the OMEGA Executive Board, consisting primarily of local elected officials, and the Ohio Department of Transportation to conduct an ongoing regional transportation planning process focused on promoting and enhancing the transportation assets of the region. For more information on the OMEGA RTPO, visit **www.omegadistrict.org/transportation.**

Infrastructure

Water, sewer, and broadband infrastructure in the OMEGA region has always been the largest challenge facing economic development activities. These challenges include antiquated and insufficient infrastructure as well as complete lack of infrastructure in some areas. OMEGA continues to work with multiple federal and state agencies to identify and prioritize infrastructure needs in the region. Multiple grant and loan program funds are often leveraged to allow large infrastructure projects to proceed. Relative to infrastructure, it is also important to emphasize that two counties in the OMEGA region (Carroll and Holmes) currently have no 4-lane highways.

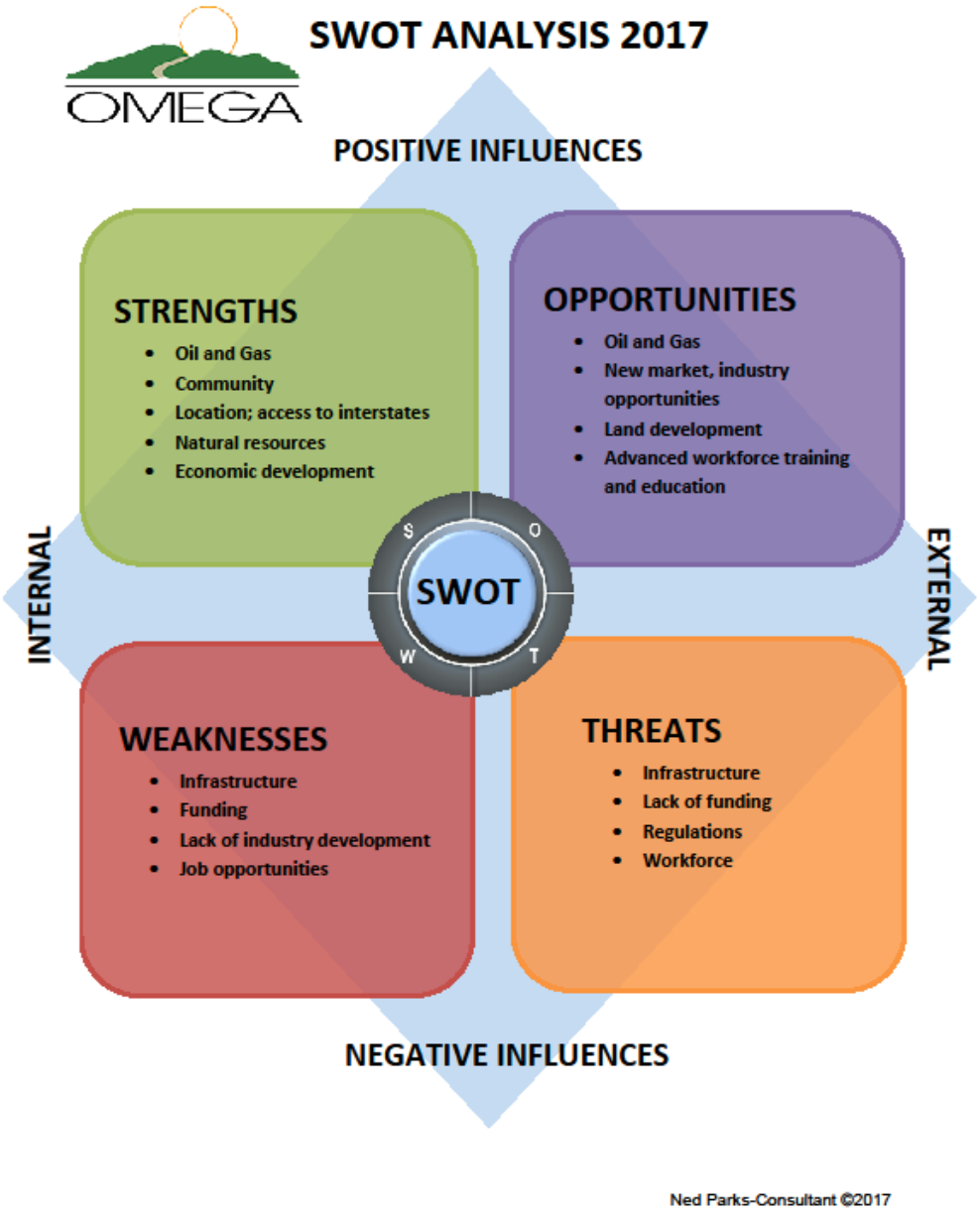
OMEGA is also supportive of the continuous improvement of broadband services in the region. According to data published by Connect Ohio, a non-profit organization that works with the state of Ohio to advance broadband issues in communities across the state, broadband availability (10 Mbps Download/1 Mbps Upload) ranged from a low of 72.16% in Coshocton County to a high of 98.17% in Holmes County. The average rate for the OMEGA region is 88.78% which is 8.36 percentage points below the state average of 97.14%.

Regional Broadband Availability	
10 Mbps Upload & 1 Mbps Download Speed	
Belmont	84.41%
Carroll	85.90%
Columbiana	94.30%
Coshocton	72.16%
Guernsey	89.75%
Harrison	86.11%
Holmes	98.17%
Jefferson	97.63%
Muskingum	90.96%
Tuscarawas	88.39%
Region	88.78%
State	97.14%
Source: Connect Ohio - May 2017	



SWOT Analysis

OMEGA partnered with Kent State University at Tuscarawas to develop and conduct an on-line **SWOT** (**Strengths**, **Weaknesses**, **Opportunities**, and **Threats**) survey of OMEGA CEDS Committee members, employees, executive board, members and representatives of affiliated organizations. A copy of the survey is located in the appendix of this report.

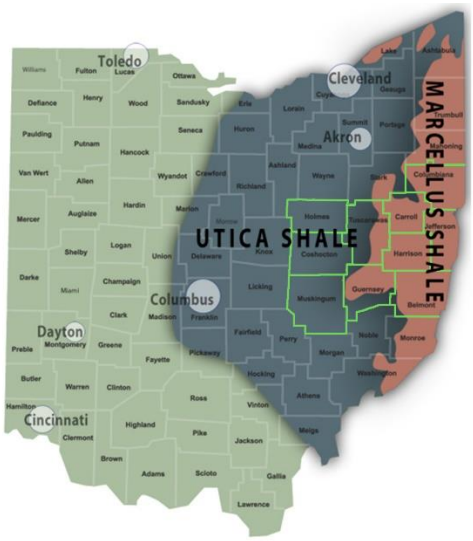


Highlight - Strength

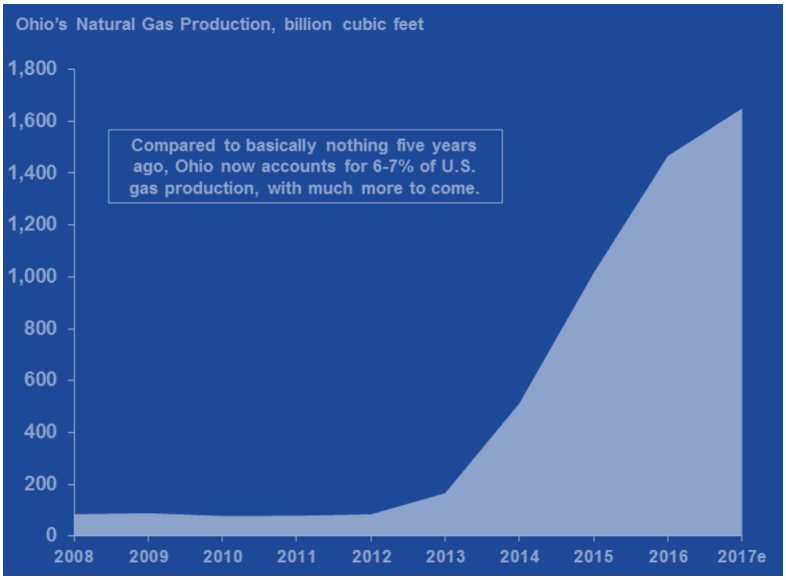
Oil and Gas

"Our newest resource — the cheapest energy in the Western Hemisphere thanks to the Utica and Marcellus Shale play." – Appalachian Partnership for Economic Growth (APEG), Regional Division of JobsOhio

Ohio's Utica Natural Gas Helps Lead the Shale Revolution



Counties included in the OMEGA region are outlined in green. All **ten** counties in the OMEGA region are included in the Utica and Marcellus Shale plays.



In 2016, the 10-county OMEGA region produced **89.5%** of the state's oil from horizontal wells (**16,118,866** barrels) and **72.8%** of the state's natural gas from horizontal wells (**1,010,794,539** MCF).

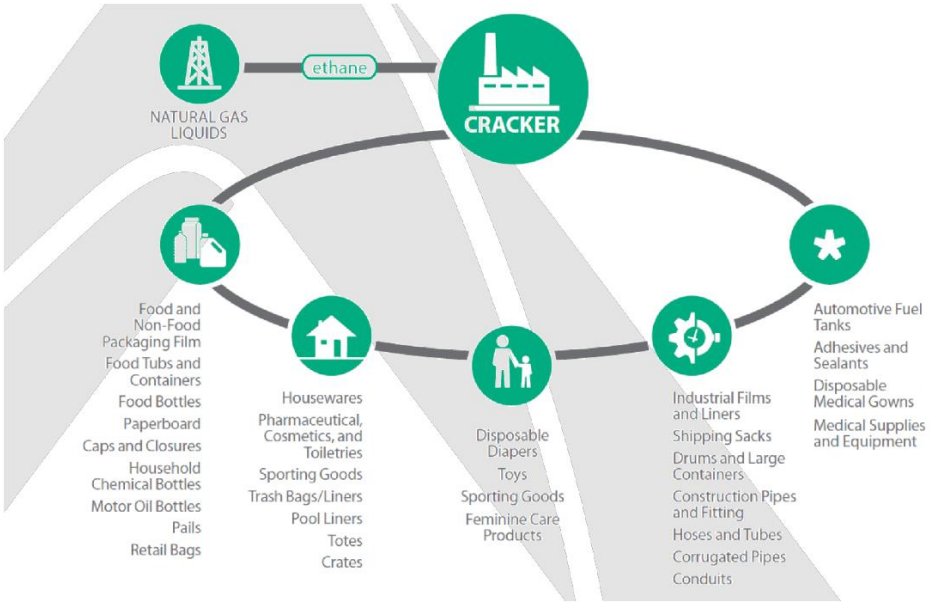
Highlight - Opportunity

New Market, Industry Opportunities

The OMEGA region recently became the home to several natural gas-fired power plants and natural gas processing and fractionation facilities. Carroll County Energy is scheduled to be in operation by the end of 2017. Three additional plants are scheduled to be in operation in Columbiana, Guernsey (recently approved by the Ohio Power Siting Board), and Harrison counties by 2020. Total investment for these facilities is anticipated to exceed **$3 billion**, create **1,500 construction jobs**, and **over 100 permanent jobs**. MarkWest Energy has invested **$3.85 billion** in processing and fractionation infrastructure in three facilities in Harrison County. Utica East Ohio invested **$1.2** billion in processing facilities. PTT Global Chemical America, Thailand's largest and Asia's leading integrated petrochemical and refining company, is considering development of an ethane cracker near the Ohio River in Belmont County. PTT Global conducted a **$10 million** pre-engineering study that showed positive results. This study was followed by a **$100 million** investment to determine a cost estimate for the full project. A final decision is anticipated for fourth quarter of 2017 or first quarter of 2018. If the project moves forward, it will take approximately four years to build the ethane cracker facility. Interest in the proposed site in Belmont County is due to its location in the Marcellus and Utica shale region and its access to major highway, rail, pipeline and port infrastructure that would increase efficiency while reducing the environmental and financial costs of transportation. If built, the facility would create **hundreds of full-time jobs, thousands of construction jobs and multiple billions of dollars in investments**.

Below is a diagram included in the *Shale Energy Development Economic Impact Analysis* produced by The Ohio State University, Extension Office in May 2017.

Downstream Value Chain Markets



Effects of Energy Sector Expansion on Employment (Non-Metropolitan Counties)

Between the 2001 and 2013 energy boom, approximately 6.5 new net jobs were created for a non-metro county with median employment which is 0.1% of the annual job growth.

Analysis shows that there is a positive effect of energy sector expansion in other sectors.

For example, 10 new energy jobs are associated with:

Year One:

3 additional jobs in other industries on average.

Year Three:

2 additional jobs in other industries on average.

Year Six:

20 additional jobs in other industries on average.

Year Ten:

7 additional jobs in other industries on average.

Tsvetkova, A. and Partridge, M. (2016) Economics of modern energy boomtowns: Do oil and gas shocks differ from shocks in the rest of the economy?, Energy Economics, Volume 59, September 2016, Pages 81-95, ISSN 0140-9883.

Highlight - Weakness

Infrastructure

1 in **4** respondents to the SWOT survey listed inadequate or lack of infrastructure as a weakness in the region. In 2017, OMEGA received **29** pre-applications requesting funding from the Appalachian Regional Commission/Governor's Office of Appalachia (ARC/GOA). **19** of the **29** pre-applications involved infrastructure. More specifically, **13** of the **19** were focused on water and wastewater treatment.

1 in 4

Survey respondents listed infrastructure as a weakness

19 of 29

ARC/GOA pre-applications requested funds for infrastructure

Highlight - Threat

Lack of Funding

1 in **5** survey respondents listed lack of funding as a threat to the region. Typically, OMEGA receives ARC/GOA pre-applications requesting funds at a rate of **3:1**. In 2017, **29** pre-applications were received requesting a total of **$4.5 million**. **$1.5 million** is available to be awarded.

1 in 5

Survey respondents listed lack of funding as a threat

3:1

Ratio of ARC/GOA funds requested to funds available

Strategic Direction and Action Plan

Based upon an analysis of the SWOT surveys, OMEGA and Kent State University identified eight Focus Areas for the region. Listed below are the **8 Focus Areas** and issues identified to be related to each.

Focus Area 1:
Oil and Gas Industry

Strategic Plan

Reinvest in community

Adaptability

Sustainability

Resiliency

Education

Environment

Availability of Capital

Focus Area 2:
Infrastructure/Funding

Broadband

Water and Sewer

Roads and bridges/New construction/Rehabilitate old

New industrial parks/Access roads

Community facilities

Downtown Revitalization/Smart Growth

Brownfields

Lobbying/Federal and State

Environmental

Downtown revitalization/Smart growth

Educational facilities

Coordinated engineering

Focus Area 3:

Local Leadership

Capacity Building

Focus Area 4:

Grant Writing

Promote awareness of what OMEGA offers (i.e. ARC, EDA, OPWC)

Help with grant writing process

Sustainability – what about after the grant?

Collaboration

Regional group meetings

Focus Area 5:

Collaboration

Outreach

Regional priorities

Project prioritization

Focus Area 6:

Revolving Loan Fund

Marketing

Job creation and retention

Partnership opportunities

RLF administration for other entities

Consider additional loan funds (ARC, EDA, USDA)

Focus Area 7:
Transportation

Infrastructure

Collaboration

Maintenance/Preservation

Transit

Funding

Active Transportation

Corridor Studies

Safety

Focus Area 8:
Workforce

Involve business and industry

Prevent young educated workforce from leaving the region

Convening stakeholders

Apprenticeships

Work with U.S. Dept. of Labor and economic development groups

Address Live/Work/Play Concerns

Small business development

Funding

Student loans

JobsOhio

Career centers

Resume/job seeking

Jobs paying a living wage

Training/re-training

Drugs

Manufacturing summer camps

By taking coordinated action steps in the **8 Focus Areas**, OMEGA's goals are to reduce unemployment, increase income, reduce poverty, and improve the standard of living for the region.

Success will be measured by using the following indicators as benchmarks:

- **Unemployment Rate**
- **Median Household Income**
- **Poverty Rate**
- **Population Changes**
- **Educational Attainment Rate**
- **Affordable Housing**
- **Number of Businesses/Organizations/Individuals Participating in or Benefitting from a Program or Project**
- **Number of Jobs Created and/or Retained in the Region**
- **Amount of Private Sector Investment in the Region after Implementation of the CEDS**
- **Square Footage of Manufacturing and Industrial Space Occupied**
- **Miles of Roadway Constructed or Improved**
- **Linear Feet of water or Sewer Line Installed or Improved**
- **Change in Access and Demand for Social and Medical Services**

As OMEGA continues the strategic planning process (facilitated by Kent State University), a score card will be developed with specific goals and objectives related to each focus area to assess progress. The scorecard will be updated annually. The seven goals listed in the 2016 CEDS report will reviewed throughout this process and incorporated into the new goals as appropriate.

Resiliency

Disasters often strike with little or no warning and the damage can be staggering. In addition to the dramatic social and humanitarian consequences a disaster can cause, communities can also experience sudden economic losses and dislocation. In disaster-impacted communities, emergency management agencies, economic development organizations (such as OMEGA) and chambers of commerce often lead economic recovery efforts by helping local businesses respond to impacted employees, facilities, customers, and supply networks. They have the existing relationships with local officials and businesses. These relationships are crucial during and after a major event as communication channels have become disruptive and chaotic. They can also facilitate a strategic planning process for economic recovery and work on recovery actions by coordinating involvement and leverage resources from the community and beyond.

Below is a chart illustrating both the traditional role of economic development professionals and their additional responsibilities in the event of a disaster as well as what they should be doing to ensure their business community is better prepared. A clear understanding of these roles & responsibilities will assist OMEGA in helping to spur economic recovery in the event a disaster should occur.

Role of Economic Development Professional

	Pre-Disaster Role	Post-Disaster Role
Analyst	Understand how possible disasters could impact local businesses /industries	Understand current conditions/damage to critical industries, businesses, property and infrastructure Assess impacts on long-term viability of businesses/industries Provide cost/benefit analysis of recovery projects
Catalyst	Establish Business Recovery Task Force to work on preparedness activities	Participate in Business Recovery Task Force to identify immediate and long-term recovery efforts Garner input and support for critical recovery initiatives Update strategic plans to match current realities

Gap Filler	Outreach to public and private institutions about setting up a bridge loan program for a disaster event	Conduct concerted outreach to reconnect with businesses and identify at-risk companies Assist with bridge-loan financing until SBA loan approval Provide business recovery assistance and services Develop programs/initiatives as needed to support long-term recovery
Advocate	Advocate for mitigation and preparedness efforts Advocate for tiered business re-entry procedures Address impacts/adequacy of community's emergency management plan from businesses' perspective	Seek funding opportunities for recovery initiatives Communicate priorities and need for policy changes to state and federal leaders
Educator	Educate small businesses on business continuity planning Educate business community on community's emergency management plan	Facilitate flow of accurate information to businesses Communicate "open for business" and "we need help and resources" messages Develop and distribute a disaster recovery guide
Visionary	Engage key stakeholders in visioning process to identify scenarios for post-disaster redevelopment	Envision how community can build back stronger, more resilient Connect public/private resources for building back a more resilient community

Source: www.restoreyoureconomy.org

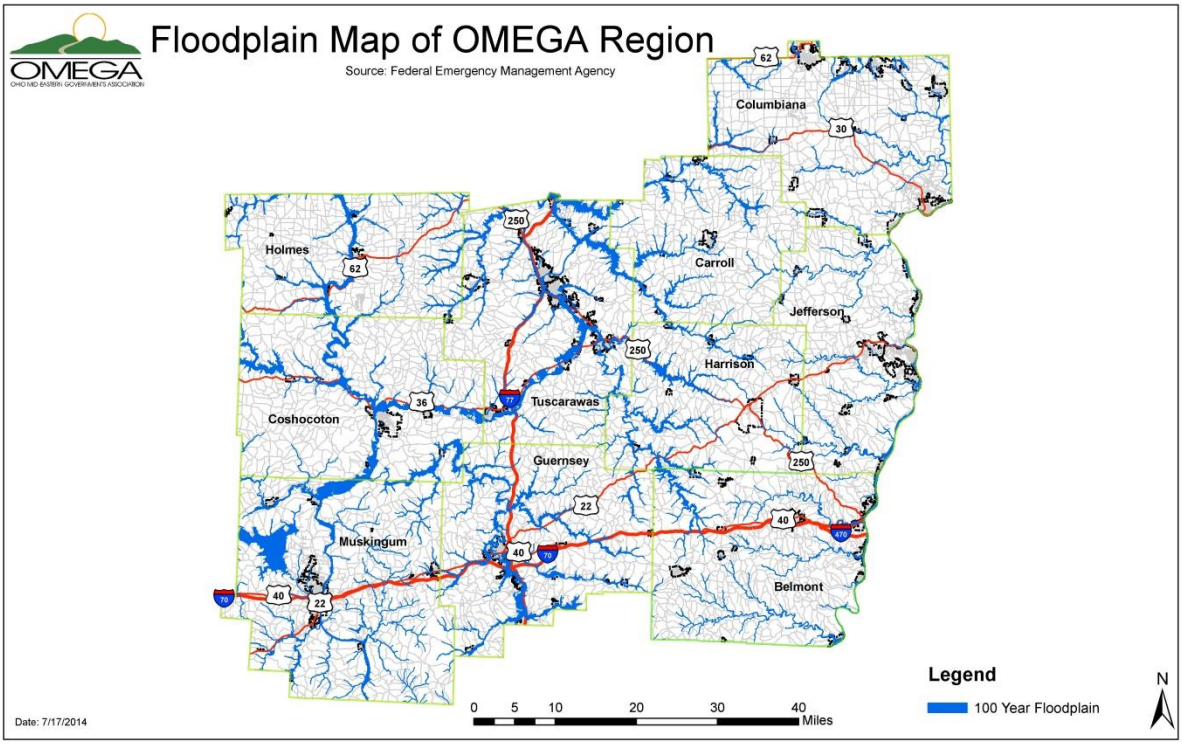
Three Most Common Causes of Natural Disaster in Eastern Ohio

- **Flooding**
- **Landslides**
- **Strong Seasonal Storms**

OMEGA counties designated in green

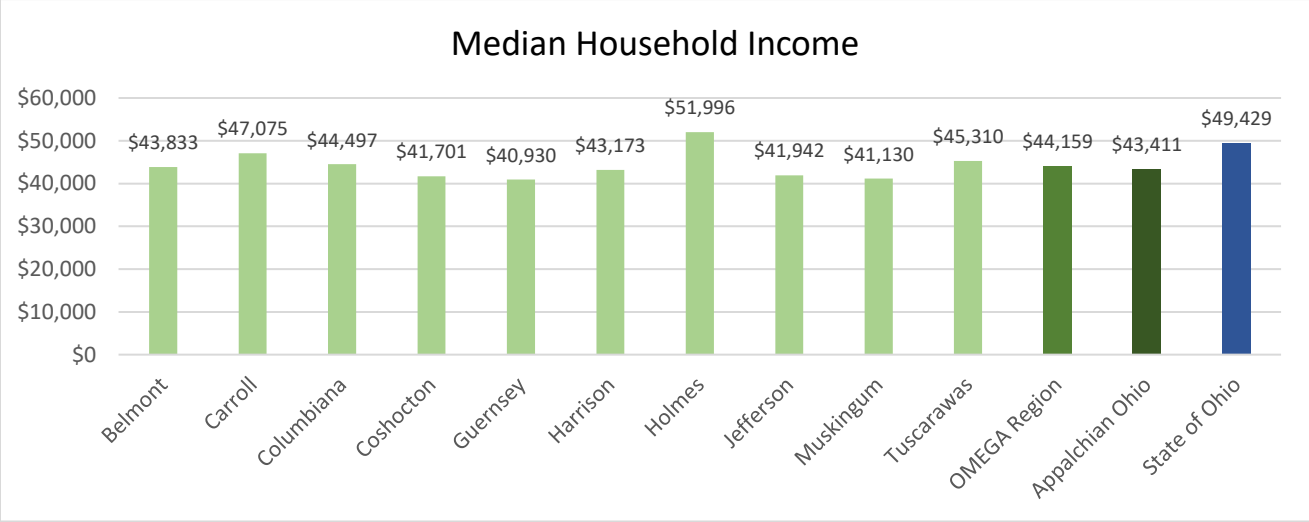
Note: Mine subsidence also contributes to the potential for disasters in the OMEGA Region.

Below is a map of the floodplains in the OMEGA Region. Floodplain management plays a critical role in disaster resiliency in eastern Ohio.

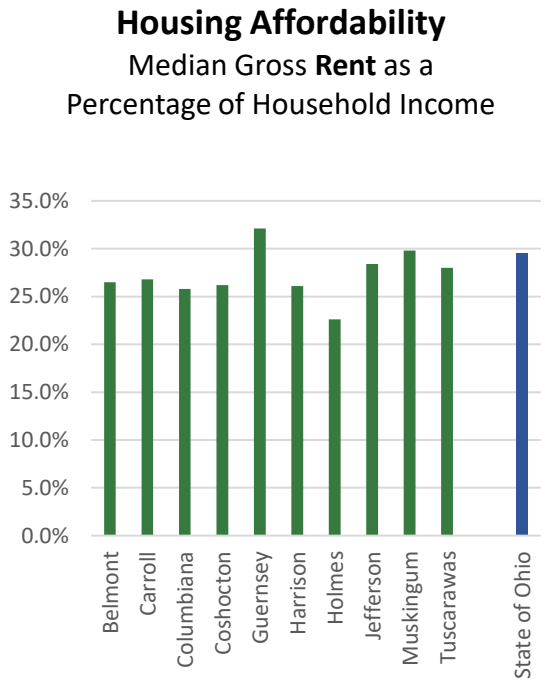


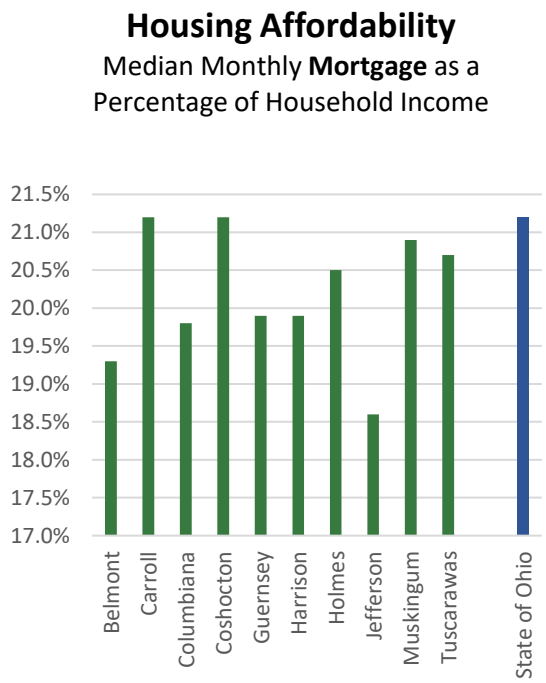
Indicators

Below is a selection of economic and demographic indicators important to understanding the OMEGA region.



Source: https://development.ohio.gov/files/research





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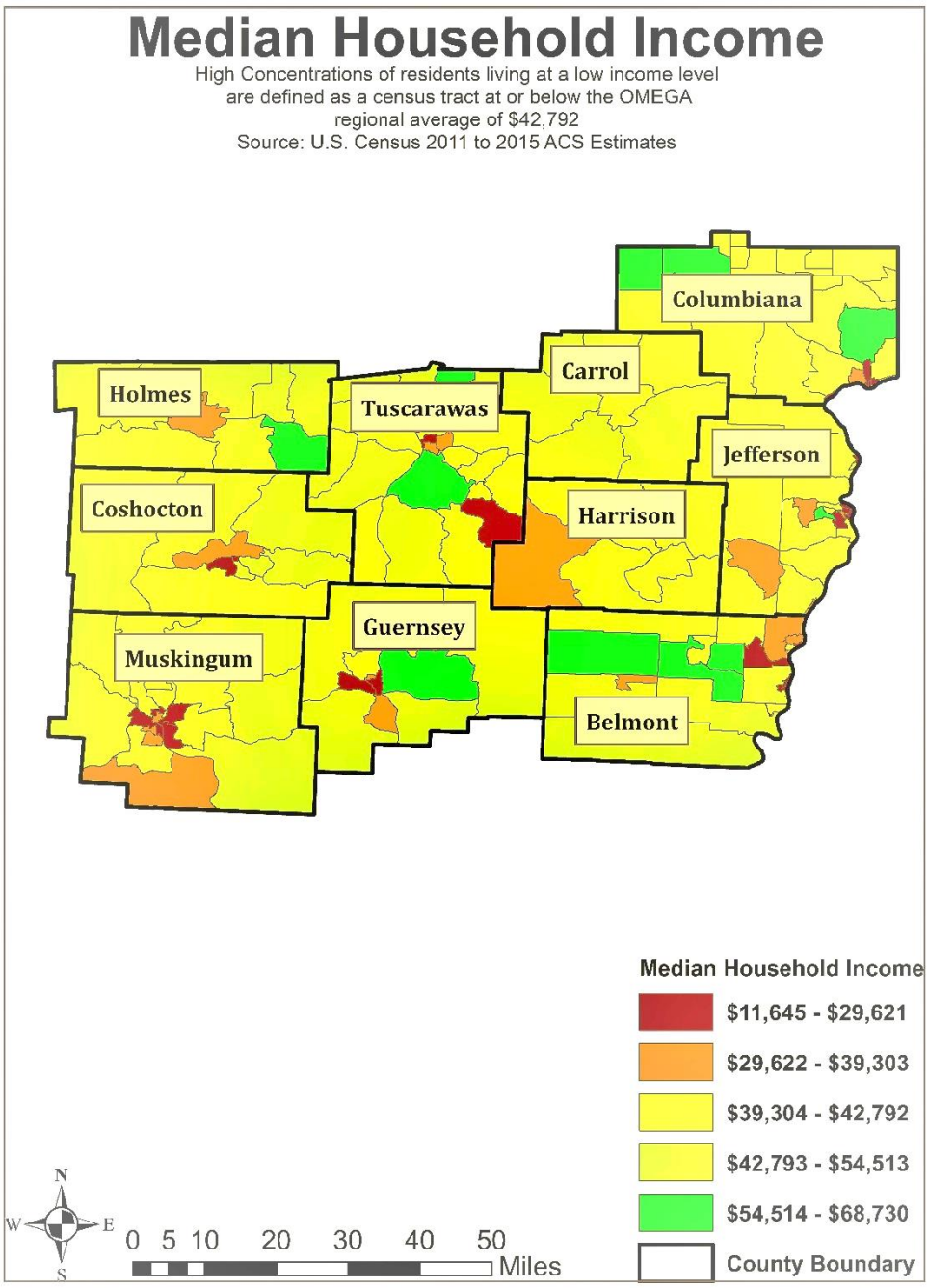
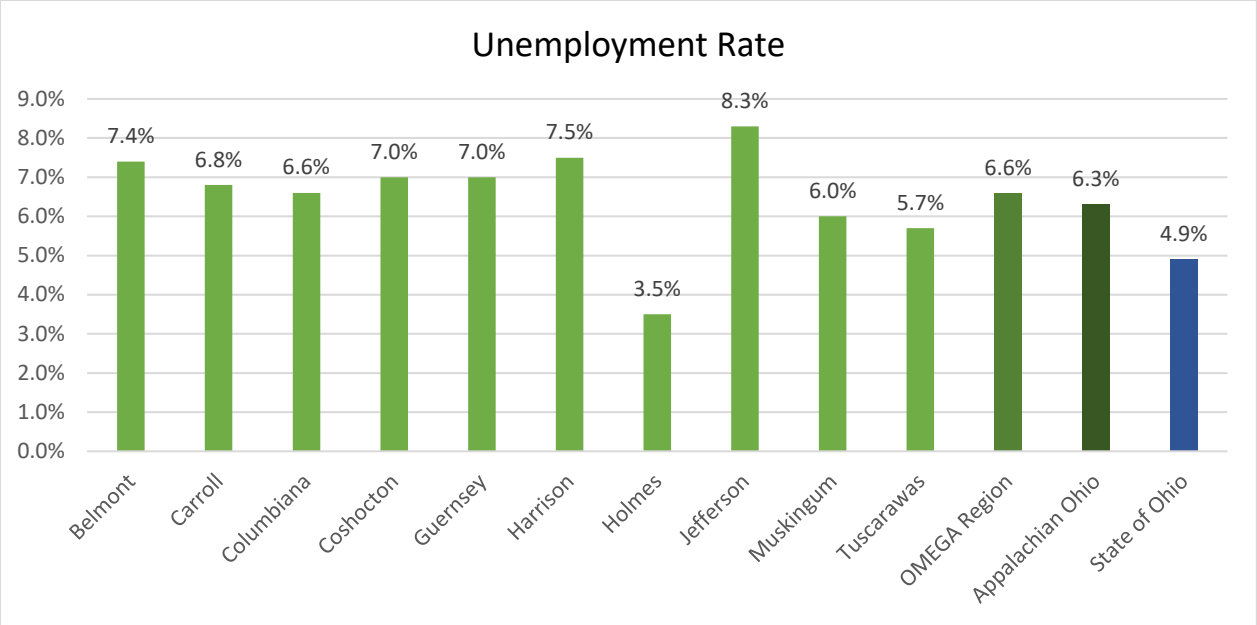
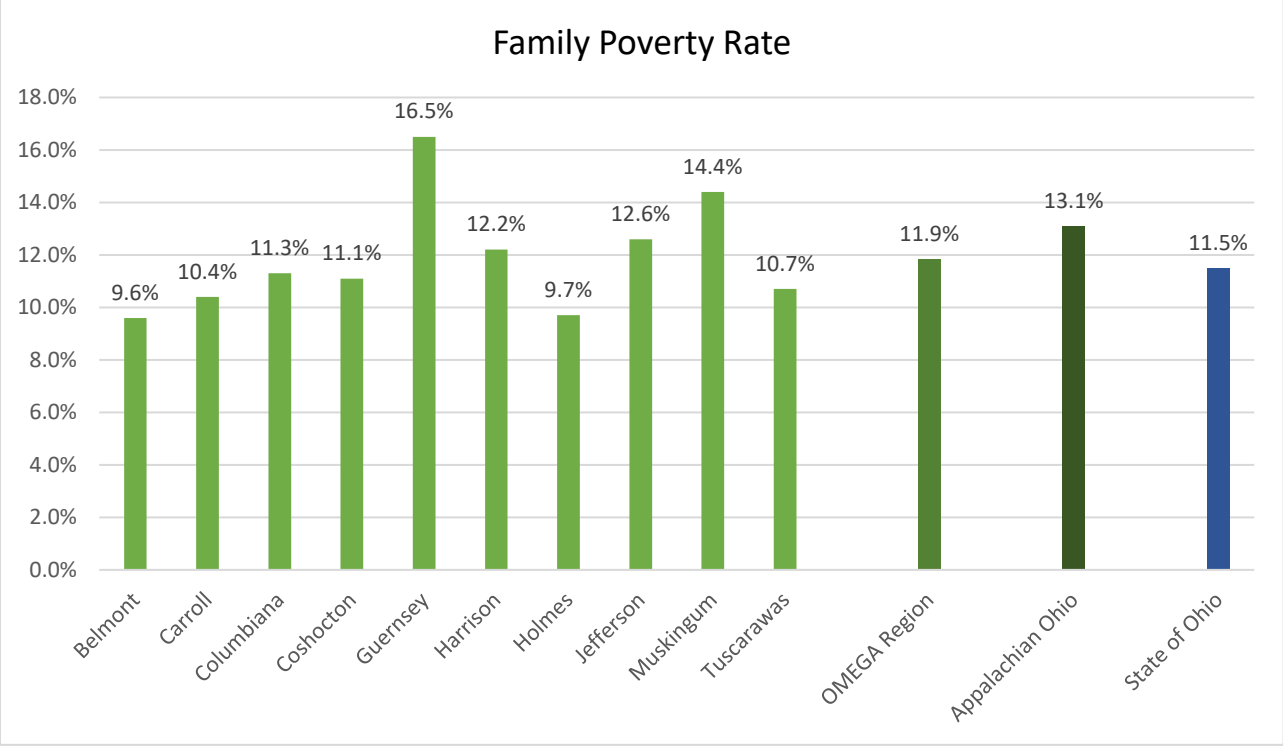
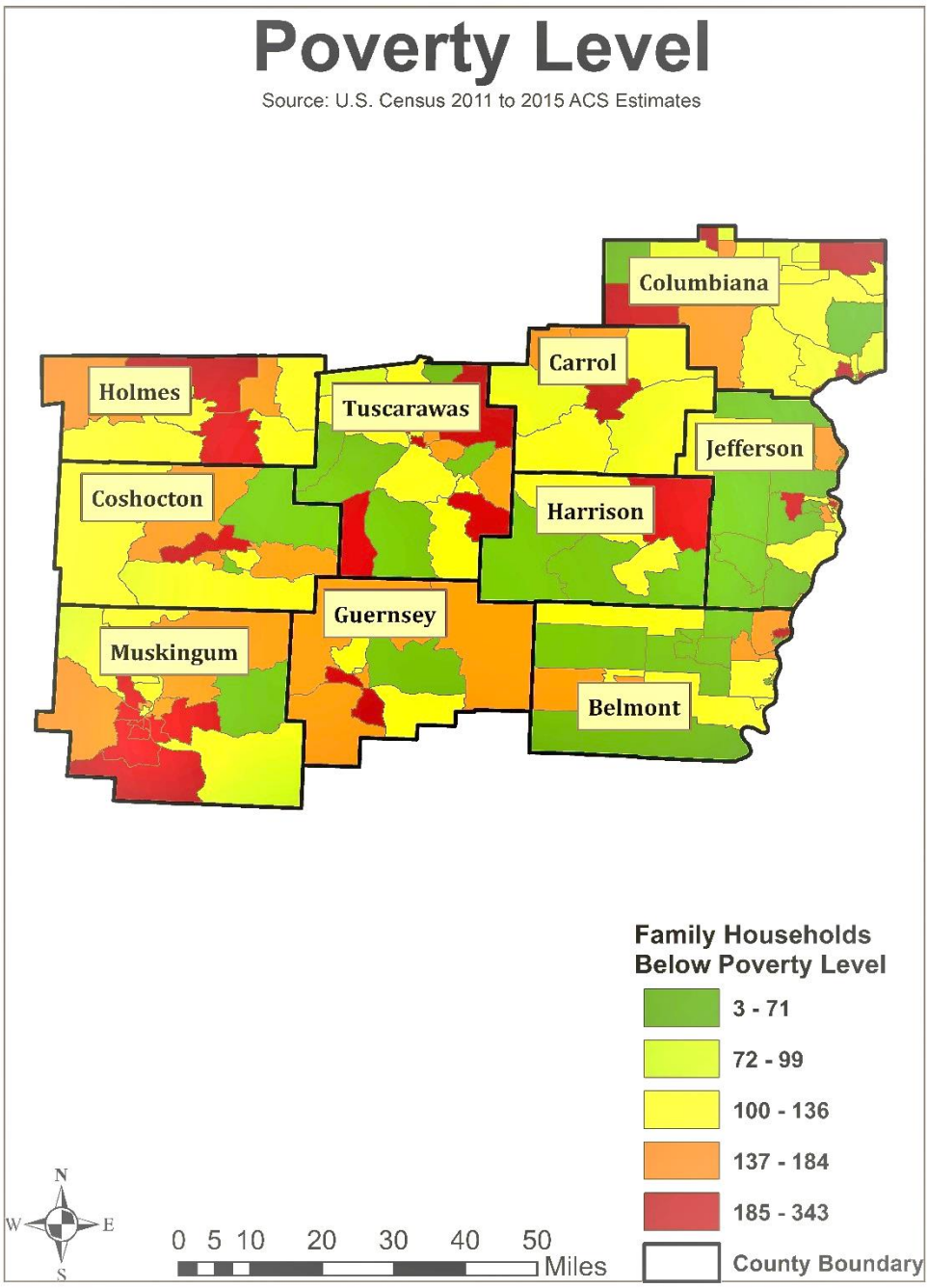

Median Household Income
High Concentrations of residents living at a low income level
are defined as a census tract at or below the OMEGA
regional average of $42,792
Source: U.S. Census 2011 to 2015 ACS Estimates
Columbiana
Carrol
Holmes
Tuscarawas
Jefferson
Coshocton
Harrison
Guernsey
Muskingum
Belmont
Median Household Income
$11,645 - $29,621
$29,622 - $39,303
$39,304 - $42,792
$42,793 - $54,513
$54,514 - $68,730
County Boundary
N
W
E
S
0 5 10 20 30 40 50
Miles

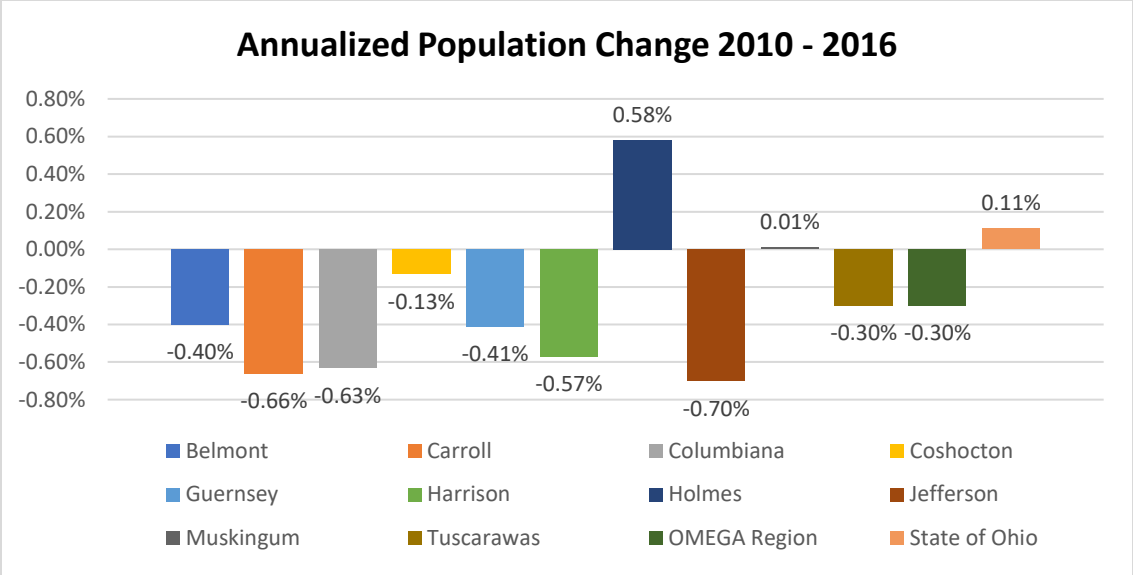


Source: https://development.ohio.gov/files/research

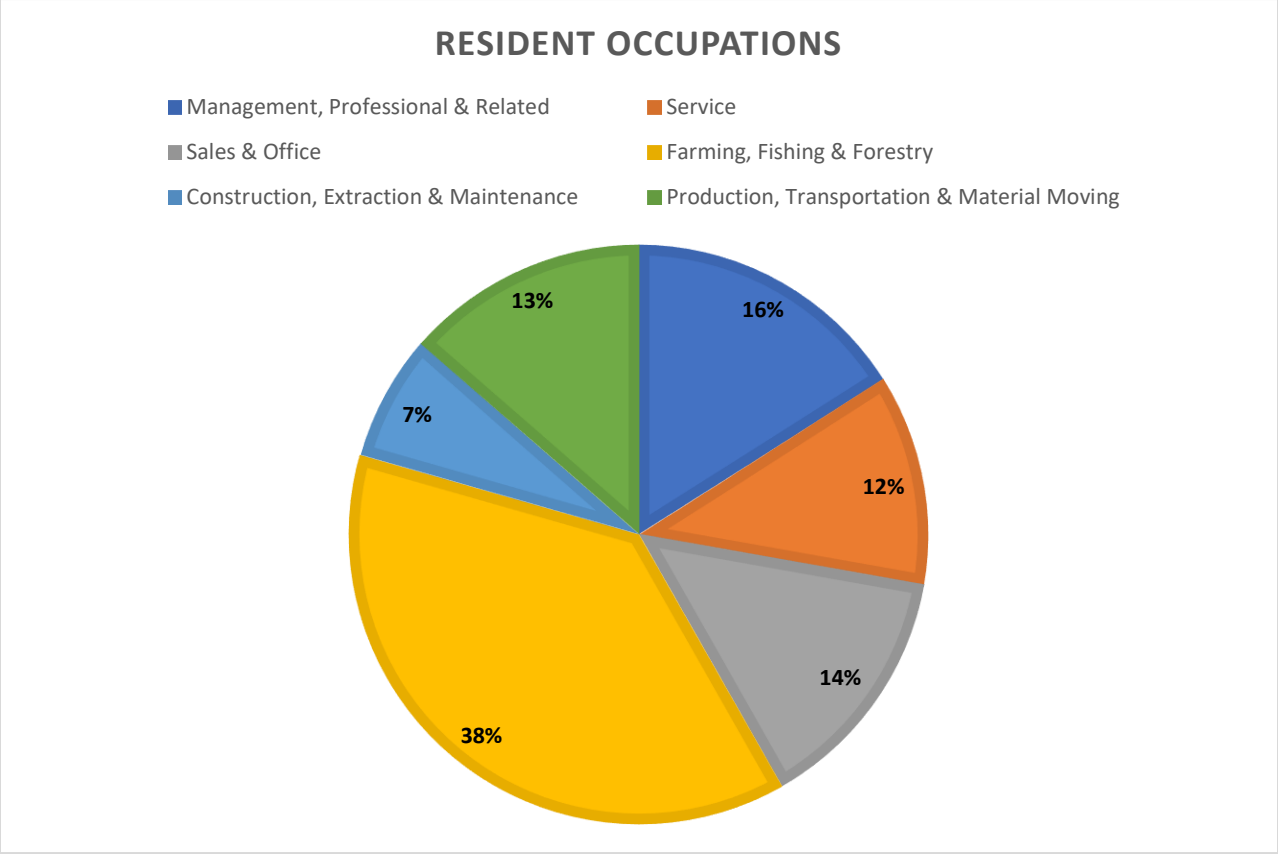


Source: https://development.ohio.gov/files/research

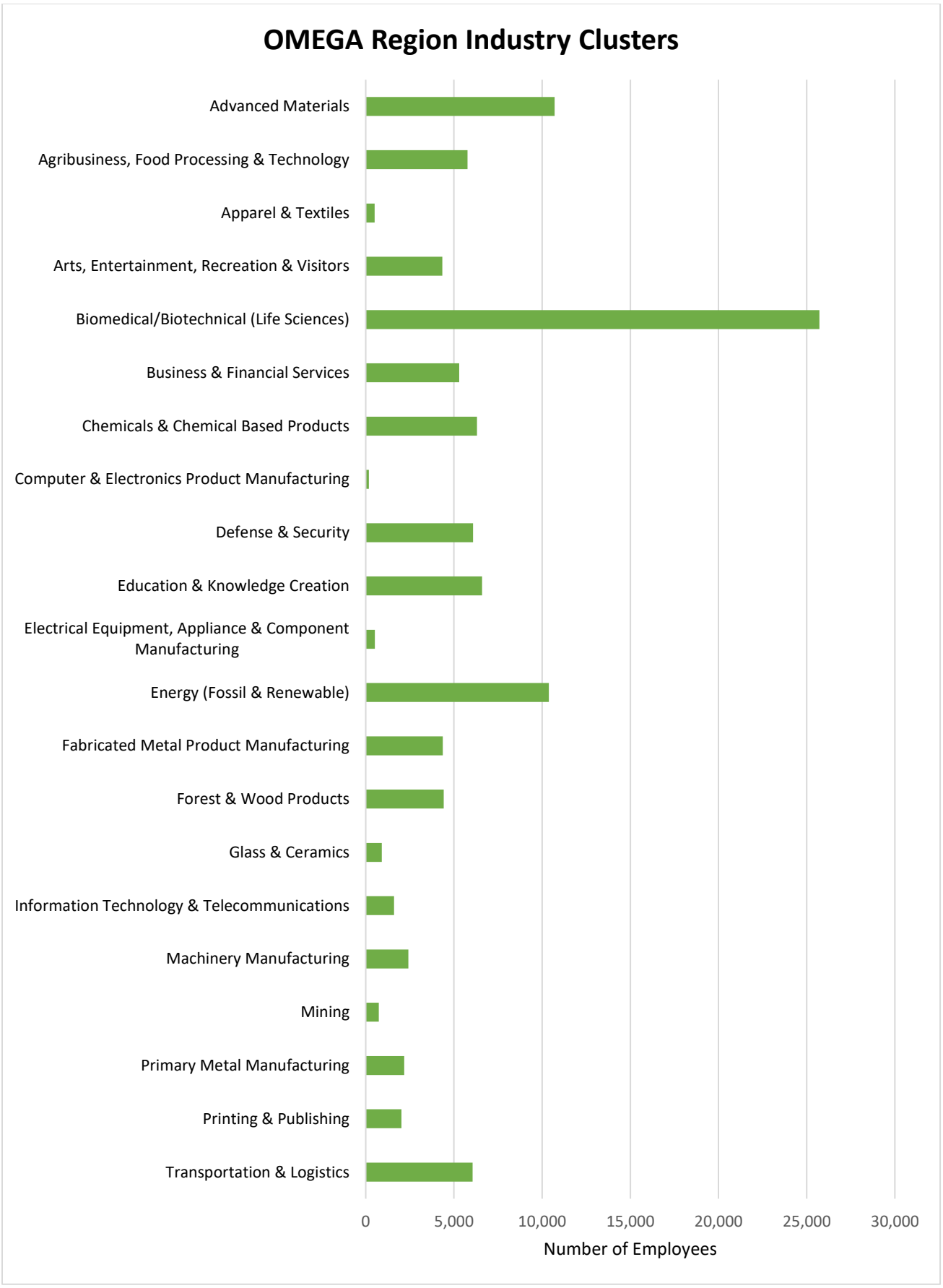

Poverty Level
Source: U.S. Census 2011 to 2015 ACS Estimates
Columbiana
Carrol
Holmes
Tuscarawas
Jefferson
Coshocton
Harrison
Guernsey
Muskingum
Belmont
Family Households
Below Poverty Level
3 - 71
72 - 99
100 - 136
137 - 184
185 - 343
County Boundary
N
W
E
S
0 5 10 20 30 40 50
Miles



Source: U.S. Census Bureau



Source: www.statsamerica.org


OMEGA Region Industry Clusters
Advanced Materials
Agribusiness, Food Processing & Technology
Apparel & Textiles
Arts, Entertainment, Recreation & Visitors
Biomedical/Biotechnical (Life Sciences)
Business & Financial Services
Chemicals & Chemical Based Products
Computer & Electronics Product Manufacturing
Defense & Security
Education & Knowledge Creation
Electrical Equipment, Appliance & Component Manufacturing
Energy (Fossil & Renewable)
Fabricated Metal Product Manufacturing
Forest & Wood Products
Glass & Ceramics
Information Technology & Telecommunications
Machinery Manufacturing
Mining
Primary Metal Manufacturing
Printing & Publishing
Transportation & Logistics
0
5,000
10,000
15,000
20,000
25,000
30,000
Number of Employees

Appendix

Survey:

The goal of this survey is to better understand the strengths, weaknesses, opportunities and threats of the 10-county region served by the Ohio Mid-Eastern Governments Association (OMEGA). This information will be incorporated into a Comprehensive Economic Development Strategy (CEDS) report that will be available to the public. OMEGA is also interested in your opinion of the services they provide.

The OMEGA 10-county region includes Belmont, Carroll, Columbiana, Coshocton, Guernsey, Harrison, Holmes, Jefferson, Muskingum, and Tuscarawas Counties.

Your responses are confidential and can only be accessed by Kent State University research professionals. The overall results of the survey will be shared with the organization in summary only; individual responses will not be reported.

A SWOT analysis is a planning method used to evaluate strengths, weaknesses, opportunities and threats of a region. Strengths and weaknesses are internal to a region, while opportunities and threats are external.

For example:

Strengths/Weaknesses
Workforce
Infrastructure

Opportunities/Threats
Funding
Economy
Regulations
Environment

Please list what you feel are the **strengths** of the 10-county region:

Please list what you feel are the **weaknesses** of the 10-county region:

Please list the **opportunities** you feel the 10-county region may have:

Please list the **threats** you feel the 10-county region is facing:

When you think of OMEGA what three words come to mind?

What services provided by OMEGA are most valuable to you?

Are there services you would like to see OMEGA add?

On a scale of 1 to 5 (with 5 being the best) how responsive is OMEGA to your needs?

What is the best way for OMEGA to communicate with your community?

Please enter your ZIP Code below:

What is your connection to OMEGA? (Please select all that apply)

Please enter additional comments here: