



The Montrose Group, LLC

TRANSFORMING YOUR WORLD

MORROW COUNTY ECONOMIC DEVELOPMENT STRATEGIC PLAN

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About the Montrose Group, LLC

The Montrose Group, LLC provides economic development planning, lobbying, marketing and public finance and incentive consulting services. The firm brings together some of the leading practitioners in economic development planning and strategy engaged in economic development planning at the state, local, and regional levels, and corporate site location. Together the team utilizes a Learn, Listen and Do approach to economic development planning that starts with fundamental economic development research to understand who a community or site is then listens to what the community wants the region or site to be and then develops a detailed action plan tied to local and outside funding sources centered on the business retention and attraction of high wage jobs and capital investment.

Nothing in this report should be considered legal advice as the Montrose Group, LLC is not a law firm and does not provide legal advice. Competent legal counsel should be sought prior to relying on any strategy outlined in this report.

About Kleinfelder – Poggemeyer Design Group

Kleinfelder- Poggemeyer Design Group is a multi-disciplinary firm specializing in municipal planning, community branding, economic and community development, grants, engineering (civil, transportation, environmental, structural, electrical, and industrial), architecture, interior design, and surveying. Kleinfelder, Inc. is an international company founded in 1961 and headquartered in San Diego, California. It has over 85 offices in the US, Canada, and Australia. Kleinfelder employs over 3,000 persons and is a national top 100 Engineering & Architecture Firm.

Kleinfelder- Poggemeyer Design Group has worked with hundreds of communities in Ohio with planning and zoning work, specifically comprehensive planning, downtown planning, parks and recreation planning, neighborhood planning, housing studies, and economic development strategies. Our architects and engineers have a long-standing history collaborating with municipal clients, bridging planning with results, to implement these planned projects in the areas of water/storm/sewer, road, electric/gas, municipal services, and municipal buildings.



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MORROW COUNTY ECONOMIC DEVELOPMENT ECONOMIC DEVELOPMENT STRATEGIC PLAN EXECUTIVE SUMMARY

Positioned approximately 30 miles north of Columbus, Morrow County is the northern most county included in the Columbus, Ohio Metropolitan Statistical Area and is less than 90 miles south of downtown Cleveland, Ohio. Morrow County has a long history of agricultural trade with much of the county landmass still utilized as farmland, although other industries such as advanced manufacturing and distribution and fulfillment operations have been growing over the years. Morrow County residents are located between two of the largest population centers in Ohio, creating access to major employment hubs, world-class healthcare and the entrepreneurial activities that flourish within the two regions. Morrow County is ripe for attracting budding technology companies, advanced manufacturing facilities, distribution and fulfillment operations, and healthcare centers, and should promote industrial site development assets to attract the robust Intel supply chain poised to expand within central Ohio. A positive regulatory environment coupled with advantageous real estate costs in the central Ohio region make Morrow County a prime area for economic development and talent attraction.

In order to achieve continued prosperity over the next five years, build on the successes around manufacturing and transportation and warehousing sector investments, capitalize on emerging industry sectors such as the semiconductor supply chain, and diversify the Morrow County economy, Morrow County's economic development department needs to enact the following action plan tactics.

1. Establish standalone Economic Development Organization via Public-Private Partnership model that brings together government and private sector stakeholders to prioritize, implement, and fund comprehensive economic development and site development priorities.
2. Morrow County should develop economic development and site development priorities that support existing business needs, builds a strong network off Morrow County business leaders, and encourages investments that creates high-value jobs and enhances the wealth of Morrow County and its residents.
3. Implement Morrow County Industrial Site Development Marketing Strategy around key sites along the Interstate 71 corridor in leading and emerging industry sectors which include Advanced Manufacturing, Semiconductor Supply Chain, and Logistics & Distribution and develop an incentives policy to attract new investment to key sites.
4. Morrow County should support private, developer-led residential investments to increase the overall housing inventory in Morrow County which will support the attraction of a diverse cross-section of talent.



MORROW COUNTY ECONOMIC DEVELOPMENT PLAN

Morrow County Economic, Demographic, Industry Cluster, and Workforce Analysis

Morrow County, Ohio has a long history of agricultural trade with much of the county landmass still utilized as farmland, although other industries like the manufacturing sector have been growing over the years. Considered one of Ohio's rural communities, Morrow County has substantial economic, demographic and community assets that position the County for valuable, targeted growth opportunities. The County is home to domestic and international manufacturers such as Cardington Yutaka Technologies Inc., Lincoln Center Manufacturing, and Yjzumi-HPM Corporation. It is important to note the strong automotive supply chain presence in the County, as well as strong agricultural sectors that have a significant employment presence in the County. From a geographic perspective, Morrow County is in the heart of Ohio. Positioned approximately 30 miles north of Columbus, Morrow County is the northern most county included in the Columbus, Ohio Metropolitan Statistical Area and is less than 90 miles south of downtown Cleveland, Ohio. Morrow County residents are positioned in between two of the largest population centers in Ohio, creating access to major employment hubs, world-class healthcare and the entrepreneurial activities that flourish within the two regions. Morrow County is deemed a location ripe for attracting budding technology companies, manufacturing facilities, Intel advanced manufacturing supply chain, and healthcare centers.

MORROW COUNTY ASSET INVENTORY

- **Industry strengths in manufacturing, automotive components, agriculture, distribution and fulfillment centers, and retail trade**
- **Central location within Columbus and Cleveland corridors**
- **Location in close proximity to Intel central Ohio site**
- **Abundance of available land for development**
- **Positive regulatory environment coupled with advantageous real estate costs in Central Ohio**

Industry Cluster Analysis

Morrow County's 2021 total population estimate is 35,151 of which 16,911 are actively in the labor force. Morrow County's labor force is transient with approximately 83 percent of the labor force travelling outside the county for employment. Additionally, Morrow County employers attract more workers from outside the community to work at their facilities. Morrow County's employment sector is largely made up of companies in the manufacturing, retail trade, healthcare, social assistance, and construction industries. These industries provide many of the jobs to residents of the County and provide a framework for what industries Morrow County should market to for future growth. The current major employers in Morrow County are primarily found within the manufacturing sector and diversified within this sector containing manufacturing opportunities for steel, automotive, lumber and more.



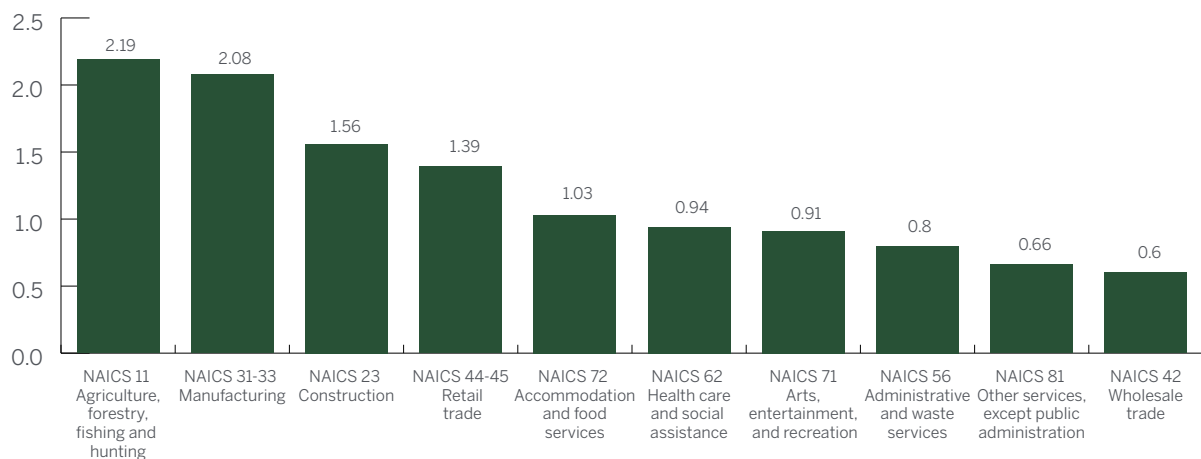
Top 10 Morrow County Employers (Non-Governmental)

Major Employers	Type
1. Cardington Yutaka Technologies Inc.	Automotive Manufacturing
2. Dollar Tree	Retail Trade
3. Bennington Glen	Healthcare
4. Fishburn Services	Agribusiness
5. Kroger	Retail Trade
6. Consolidated Electric	Utility
7. Woodside Village	Healthcare
8. Lubrication Specialties Inc.	Manufacturing
9. Morrow Manor	Healthcare
10. Mid-Ohio Sports Car Course	Automotive Racing

Source: Morrow County Development Office

A location quotient is a method of using Federal industry cluster data to identify the economic concentration of a certain industry in a state, region, county, or city compared to a base economy, such as a state or nation. A location quotient greater than 1 indicates that a locality, in this case Morrow County, has a higher concentration of companies in a specific industry sector than does the rest of the nation. For this analysis, data was gathered on the ten industry sectors with the highest location quotient. Morrow County currently features a higher concentration in the industries of agriculture, fishing and hunting, manufacturing, construction, retail trade/distribution and fulfillment, and accommodation and food services when compared to the rest of the nation. This information is not surprising when looking at the major employers in the Morrow County area. Companies like Cardington Yutaka Technologies Inc., Lincoln Center Manufacturing, Inc., and Lubrication Specialties all fall under the 2-digit NAICS manufacturing sector. While many of the major employers in the area do not fall under the agriculture sector, this segment still plays a large role in the county. There are over 865 farms in Morrow County, with an average size of 191 acres. A large majority of these farms are locally owned small businesses. Approximately 53% percent of the total land use in Morrow County is dedicated to cultivated crops. The agricultural significance here is even displayed in the Morrow County slogan *Love Life. Live Rural.* These factors explain why these industries are two of the stronger industry segments in the Morrow County area.

2021 NAICS 2-Digit Location Quotient

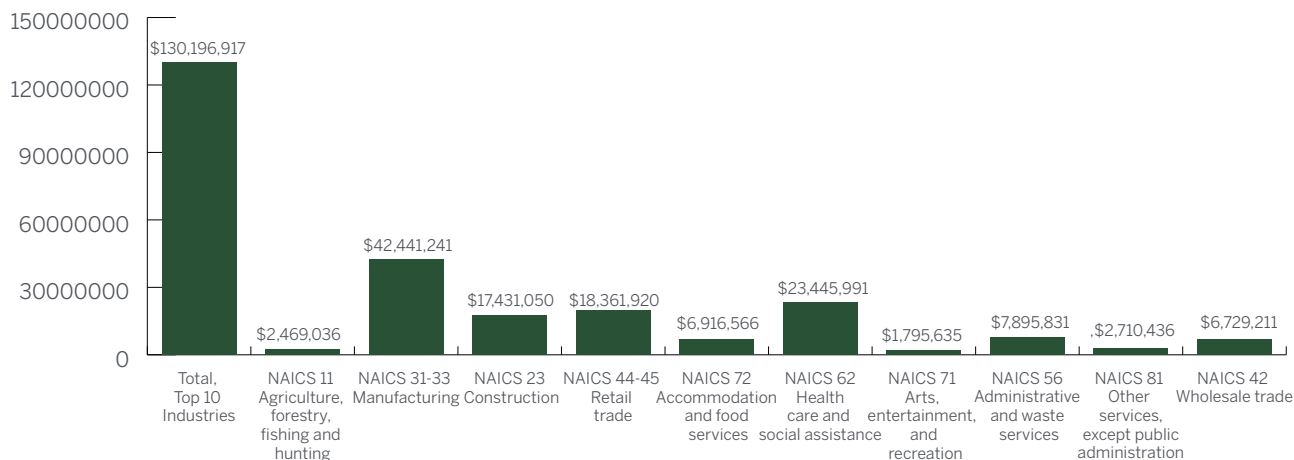


Source: U.S Bureau of Labor Statistics



The annual wages represent the amount paid out to Morrow County employees over a one-year period. Overall, the top 10 sectors paid out \$130,196,917 during the year of 2021. On average the top ten industries are providing an average of \$13,019,691 in wages to the employees working in Morrow County. Although, NAICS 31-33 manufacturing paid the highest amount, 32.59% percent of the total. While agriculture may have the highest location quotient score, they are lacking in the total wages paid section. Just 1.89% of the total annual wages for the top ten industries comes from NAICS 11 agriculture, forestry, fishing, and hunting. Morrow County is reliant on the manufacturing and healthcare industries as these two sectors represent half of the county's total annual wages for the top ten industries.

2021 NAICS 2-Digit Total Annual Wages

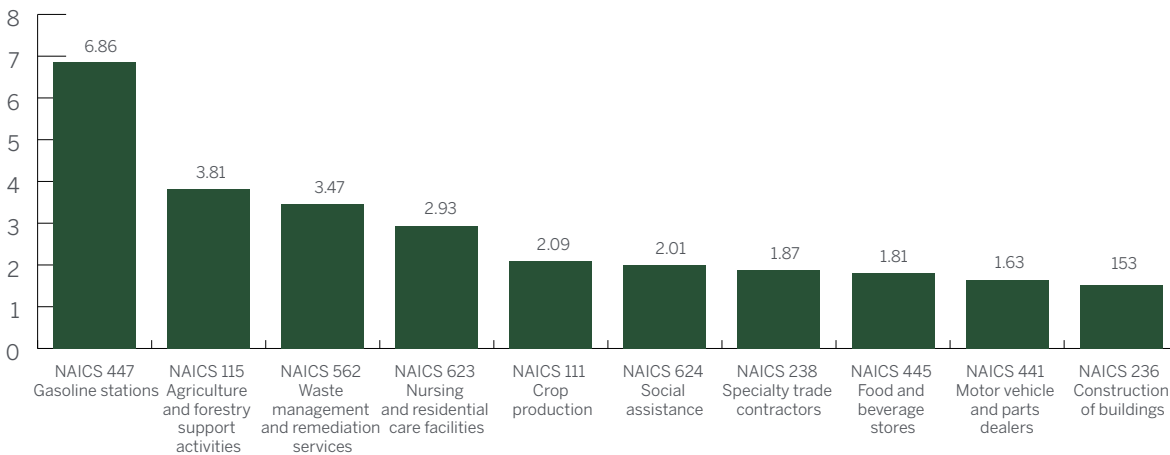


Source: U.S Bureau of Labor Statistics

Looking into the NAICS 3-digit sectors provides a more specific view of the types of industries that are prevalent inside the area. Morrow County's five highest location quotient scores are in gasoline stations, agriculture and forestry support activities, waste management and remediation services, nursing and residential care facilities, and crop production. Gasoline stations has the highest location quotient in Morrow County at 6.86 meaning the County has a 6.86 times greater concentration of gasoline stations than does the rest of the country. This can be attributed to two interchanges along the Interstate 71 corridor in eastern Morrow County. Crop production has a location quotient score of 3.81, Waste management and remediation services has a location quotient of 3.47. Nursing and residential care facilities has a location quotient of 2.93. Finally, crop production has a location quotient score of 2.09. The 3-digit scores further explain the importance of agriculture in the region as two of the top five industries fall under this sector. The graph below indicates the annual average location quotient for the year 2021 in Morrow County.



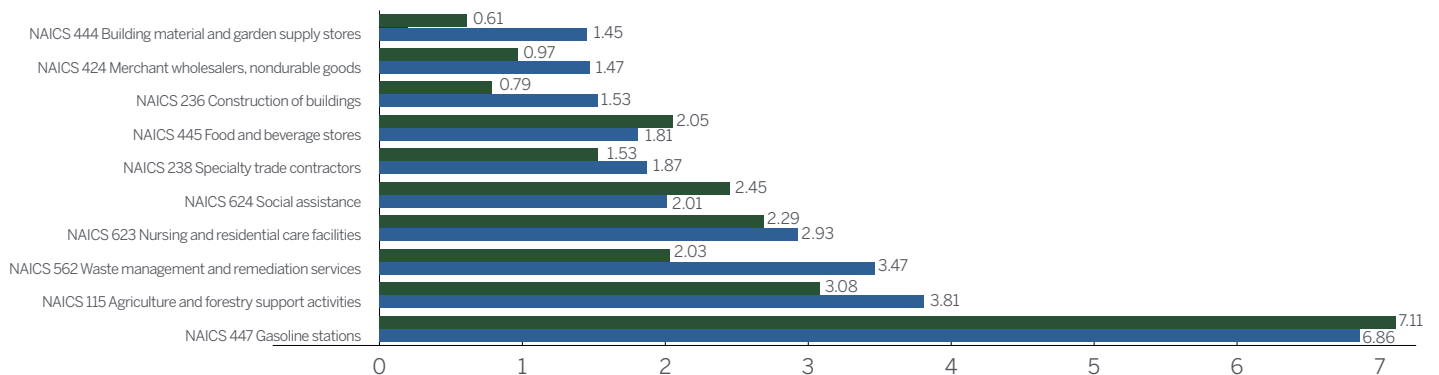
2021 NAICS 3-Digit Location Quotient



Source: U.S. Bureau of Labor Statistics

When comparing the top ten NAICS 3-digit industries from 2021 to their status in 2017 we notice that seven of the highest industries from 2021 increased from their position in 2017. NAICS 447 gasoline stations remained relatively stable, continuing its trend as the number one highest location quotient score. Only three total sectors have decreased from 2017 to 2021, NAICS 447 Gasoline stations (-3.64%), NAICS 624 Social assistance (-21.89%), and NAICS 445 Food and beverage stores (-13.26%). During this timeframe, transitions in employee status and private sector home health services occurred which likely reflect a decrease in location quotient strength in the Social assistance sector. While job openings in the Social assistance sector did not decline during this timeframe, many of these positions went unfilled during the COVID 19 pandemic. Due to the impacts of the COVID-19 pandemic, sectors like NAICS 445 Food and beverage were significantly impacted and experienced decreases in employment and business closures nationwide. Many areas like Morrow County are home to locally owned restaurants that, due to mandated shutdowns, were unable to stay open and sustain their business. The largest location quotient increase from this time period was in NAICS 444 Building material and garden supply stores, which increased by 57.93%. Following this is NAICS 236 Construction of buildings (48.37%), and NAICS 562 Waste management and remediation services (41.50%).

Morrow County NAICS Location Quotient Comparison 2017-2021

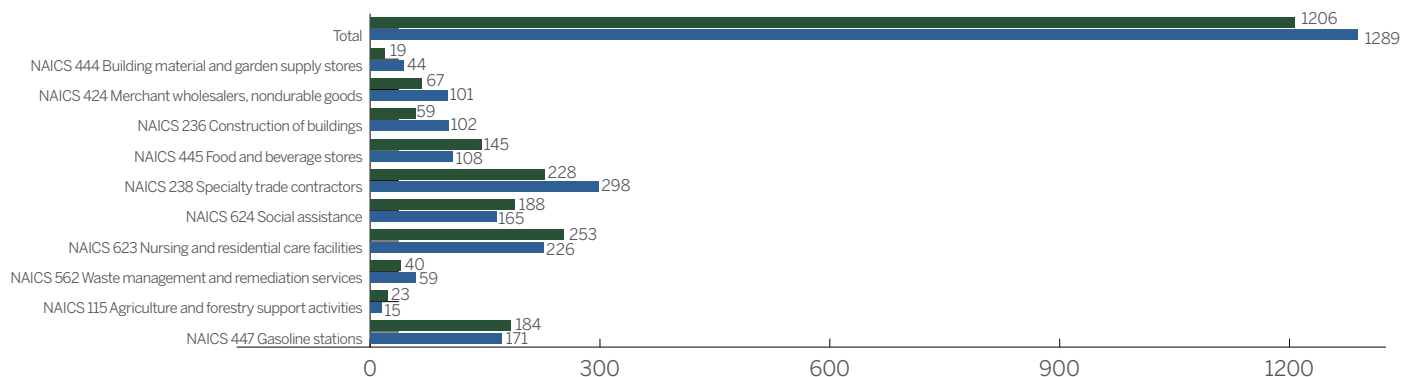


Source: Bureau of Labor Statistics



Overall employment in Morrow County experienced modest growth of 6.44% between 2017 and 2021, with 83 total net new jobs created across all industry sectors. During the same period, Morrow County's unemployment rate decreased slightly from 4.9% to 4.5% and the civilian labor force increased from 16,831 to 16,911 employees. Analyzing the top ten industry sectors by Location Quotient, four of the five of the strongest industry sectors saw average annual employment decline over the five-year period.

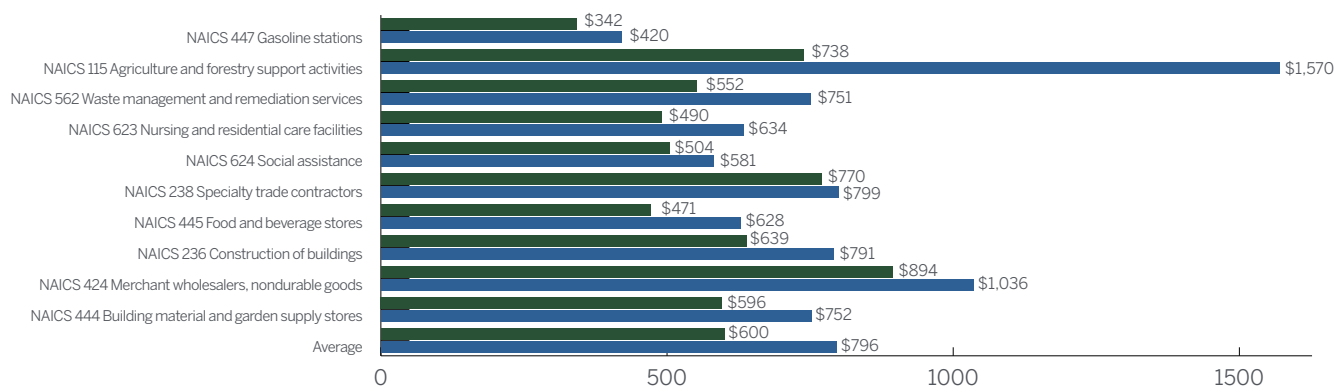
Morrow County Employees by Employment Sector, 2017-2021



Source: U.S. Bureau of Labor Statistics

When analyzing trends in employee wages across all industry sectors, Morrow County experienced an average weekly wage growth of 16.6% in the five-year period of 2017 to 2021. Drilling down into the County's leading industry sectors we see similar wage growth over the same five-year period, averaging 4.92% per year. All ten of the leading industry sectors saw average weekly wage growth over this time period. The largest increase came in the NAICS 115 Agriculture and forestry support activities. In 2017, the average weekly wage was \$738 and in 2021 it had increased 53% to \$1,570. The second largest wage increase over this five-year time span was in the NAICS 562 Waste management and remediation services. This sector increased from \$552 to \$751, a 26.5% increase. The following four largest average annual wage increases from 2017 to 2021 are as follows; NAICS 445 Food and beverage stores increased 25.0%; NAICS 623 Nursing and residential care facilities increased 22.7%; NAICS 444 Building material and garden supply stores increased 20.7%; NAICS 236 Construction of buildings increased 19.2%.

Morrow County NAICS Industry Wages Trend, 2017-2021



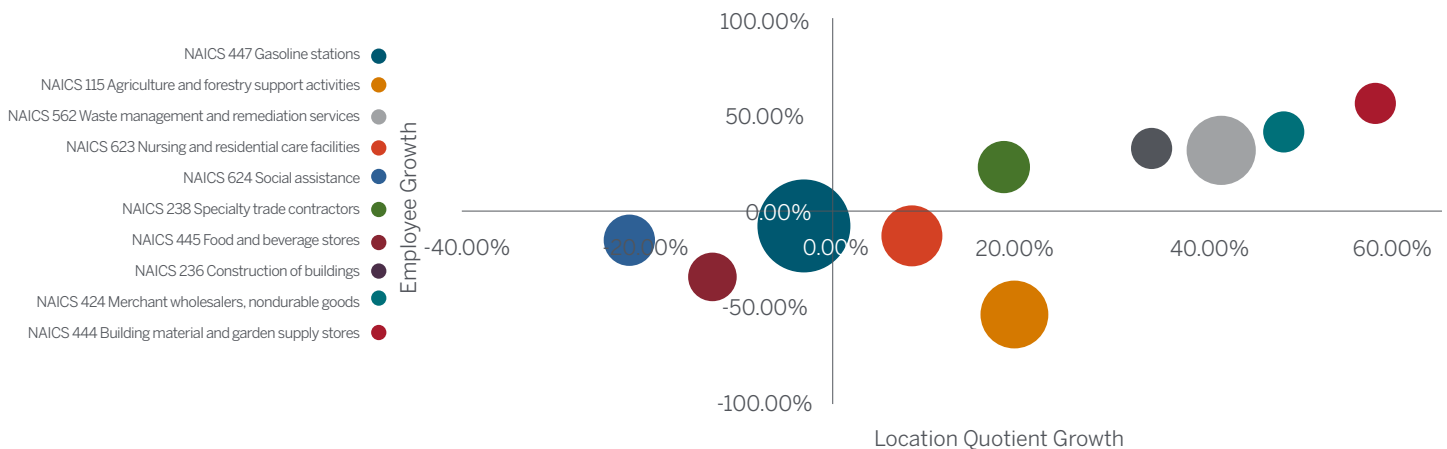
Source: U.S. Bureau of Labor Statistics



Morrow County, Ohio Sector Strength Analysis

The following chart analyzes growth trends within the 3-digit NAICS sector codes for Morrow County based on data collected over the 5-year period of 2017 to 2021. The size of the bubbles represents the current location quotient score in the industry. Industry sectors located left of the Y-axis have decreased in location quotient while industry sectors to the right have increased in location quotient. The Y-axis represents the percentage change in the number of employees for that industry sector. For example, NAICS 447 Gasoline stations represents the largest bubble on the graph. The location quotient for this sector decreased 3.64% percent, and the employee number decreased 7.6% percent. So, while Morrow County does have a larger percentage of residents working in this industry relative to the nation, the industry is declining. Other industries declining in both location quotient score and employee number is NAICS 624 Social assistance and NAICS 445 Food and beverage stores. The leading industry in this graph is NAICS 444 Building material and garden supply stores. The location quotient score for this industry grew by 57.9%, and the employee number grew by 56.8% percent. Other industries that increased in both location quotient score and employee numbers are NAICS 562 Waste management and remediation services, NAICS 238 Specialty trade contractors, NAICS 236 Construction of buildings and NAICS 424 Merchant wholesalers, nondurable goods.

Industry Sector Bubble Chart



Morrow County Business Attraction Industry Sectors

Industry	NAICS
Specialty trade contractors	238
Machinery Manufacturing	333
Transportation and warehousing	48-49
Semiconductor and related devices	33441
Merchant wholesalers, nondurable goods	424

Demographic, Labor Market, and Workforce Analysis

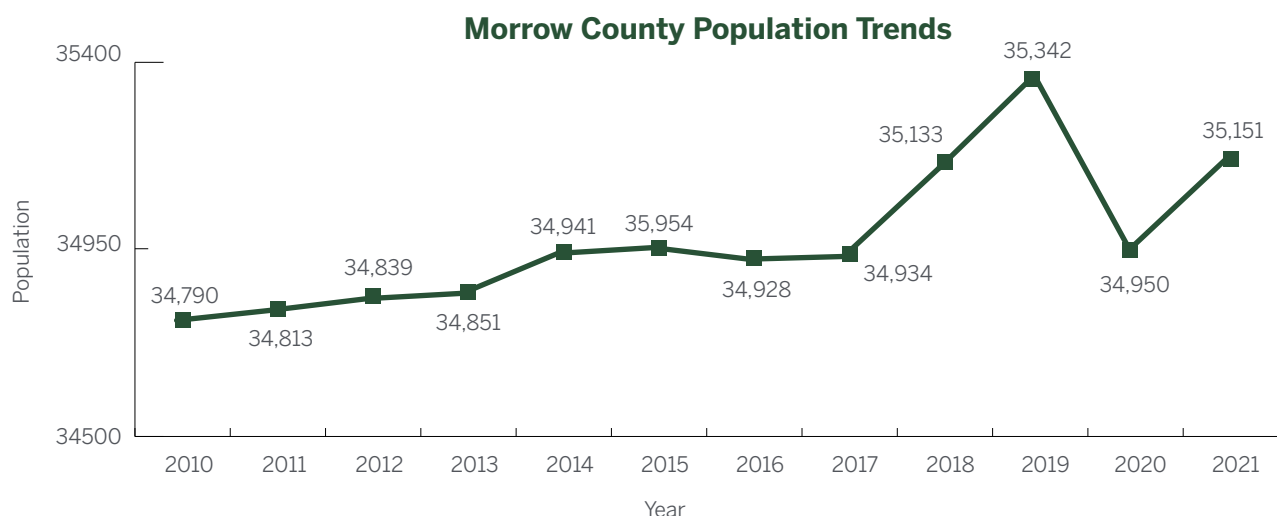
A region's workforce is a critical measure of its economic success. The retirement of the Baby Boom generation and a lack of alignment between industry and both K-12 and higher education are creating widespread shortages in qualified workforce even in times of high unemployment. Regions that are successful with the retention of a high-quality workforce start with a strategy of targeting good jobs using initial upfront training and job-matching services and create support for workers such as childcare and transportation networks plus financial incentives for companies that take such an approach. An examination of a community's workforce includes a review of its size, unemployment rate, education level, occupations, earnings levels, and more.

People	Morrow County, OH	Ohio	U.S.
2020 Population	34,950	11,799,448	328,239,523
Population Growth 2010-20	0.35%	2.28%	7.35%
Persons 65 years and over	17.8%	17.5%	16.5%
Homeownership Rate	82.5%	66.3%	63.8%
Median Home Value	\$161,000	\$160,500	\$204,900
Median Household Income	\$61,769	\$58,116	\$60,293
Poverty Rate	9.1%	13.6%	10.5%

Source: U.S. Census Bureau

According to 2020 U.S. Census Bureau data, Morrow County has an estimated population of 34,950 and ranks 69th out of Ohio's 88 total counties by population, representing 0.3% of Ohio's total population. Over the last decade, Morrow County has maintained a steady population with minor growth year over year and only two years of negative population growth since 2010. It is currently below the population growth rates experienced by the state of Ohio and the United States, however the Mid-Ohio Regional Planning Commission Comprehensive Economic Development Strategy (CEDS) report estimates Morrow County's population will see 10.2 percent growth over a thirty-year period of 2000-2030.ⁱ While many rural counties of similar size and structure have experienced population decreases over this time frame, Morrow County's location in the central Ohio region will likely be the primary factor in population increases in the next decade. In terms of population density, Morrow County currently averages 86.1 people per square mile. Population density is expressed as the average number of people per square mile of land area and with an average of 86.1 people per square mile. Morrow County currently has the smallest total population and lowest population density of the five neighboring counties that include Knox, Delaware, Marion, Crawford, and Richland County.

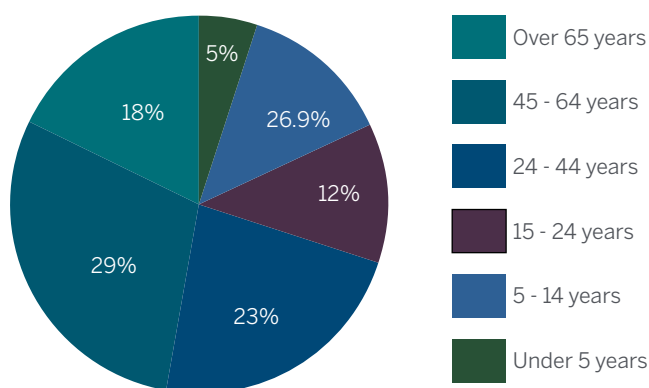




Source: U.S. Census Bureau

Fifty-two percent of Morrow County's population is in the age demographic of 25-64. This age range is deemed the prime working years for residents of the United States. The availability of a workforce primed for employment based upon age is a major advantage for any region and one that many states struggle to address. In addition, regions need a pipeline of future workers with a strong student age population. This workforce pipeline creates an opportunity for communities to grow not just through the import of workers from other regions but through the retention of their student population to remain following the completion of school or technical training. For Morrow County, the pipeline of population younger than 25 is not keeping pace with those between 25 and 64. Roughly 30% of County residents are under the age of 25 and, like most small counties, Morrow County is not retaining enough of its young people and those that live in the County are not producing enough new citizens to keep pace with future workforce needs.

Morrow County Population By Age



Source: U.S. Census Bureau

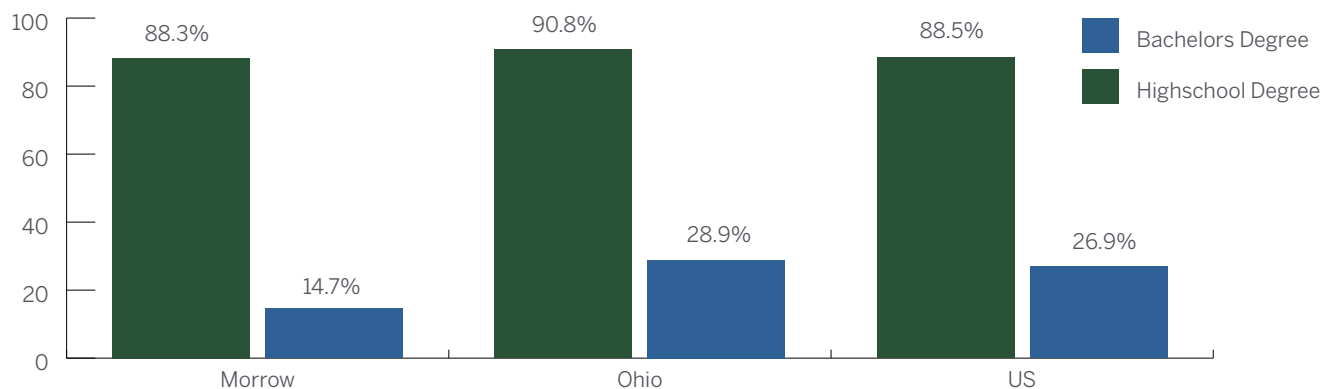
The educational attainment of a region is highly important as it relates to the availability of a skilled workforce. Those regions with a high concentration of college educated workers are primed to retain and attract high-wage, white collar jobs in financial services, information technology, health care and professional service



firms that drive many successful economies. The graph below shows the comparison between Morrow County, Ohio, and the United States in terms of high school and bachelor's degree graduation rates. Morrow County fares well in the high school graduation rate and is on par with the national average of 88.5% and is just 2.5% below the state of Ohio average. Morrow County does face a significant problem in the percentage of population that have received bachelor's degrees or other forms of higher education. Morrow County trails the state of Ohio by 14.2% in residents that have obtained a bachelor's degree or other form of higher education and is 12.2% lower than the national average. The ability to attract higher wage jobs that require advanced skill sets and a bachelor's degree or higher, and its ability to fill the jobs of management at manufacturing, transportation and engineering companies is hampered by this low baccalaureate rate. Morrow County will struggle to keep and retain residents with higher education due to the proximity of the County to larger metropolitan regions that offer diverse housing options, higher density of amenities, and walkability and mobility assets that connect people to places among other Quality of Life factors. Many residents may choose to leave the Morrow County area entirely and move to the large metropolitan areas of Columbus, Cincinnati, and Cleveland to pursue higher education opportunities and future employment. Finding ways to attract these highly educated individuals back to the community is an area of focus for Morrow County.

Morrow County school districts are part of the Mid-Ohio Educational Service Center Business Advisory Council whose mission is to advocate an active partnership between business and education in Crawford, Morrow, and Richland Counties through open communication, strategic collaboration, and specific emphasis on workforce readiness, leadership development, and civic engagement for all students in the region.ⁱⁱ Mid-Ohio ESC serves over 17,000 students in ten school districts. Mid-Ohio ESC is also a partner with Pioneer Career and Technology Center and is the community school sponsor for GOAL Digital Academy and The Tomorrow Center.ⁱⁱⁱ Morrow County educator and business involvement in the Business Advisory Council, coupled with the support of OhioMeansJobs Morrow County and Morrow County Department of Job & Family Services are excellent initiatives to build a pipeline of Morrow County's workforce of the future, retain talent in Morrow County, and meet the current and future needs of Morrow County employers. Additionally, the Morrow County Development Office is partnering with MOESC to create a Morrow County Business – Education Partnership Action Team to create career readiness activities for Morrow County students.

Morrow County Educational Attainment



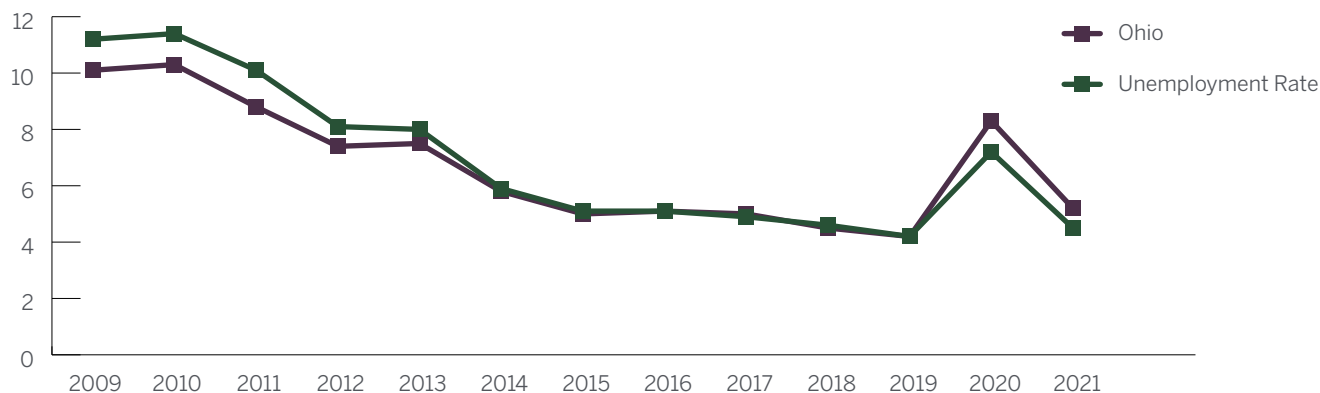
Source: U.S. Census Bureau

While no single number captures all the distinctions in the health of the labor market, the unemployment rate is considered one of the most important economic indicators. The unemployment rate measures the share of workers in the labor force who do not currently have a job but are actively looking for work. Morrow County has had major swings in their reported unemployment rate data over the previous years. The large shifts in unemployment rate are not entirely due to the behavior of Morrow County and its residents. The unemployment rate rose from 5.8% to 11.2% from 2007 to 2009, which can be attributed to the recession



experienced nationally during this period. Morrow County quickly bounced back from the high unemployment rate and from 2010 to 2015 the unemployment rate dropped over six percent and remained steady until 2020. Due to the emergence of the COVID-19 pandemic the unemployment rate jumped to 7.2% before returning back to 4.5%. Overall, Morrow County has maintained an unemployment rate on par with the state of Ohio.

Morrow County Unemployment Trends, 2009-2021



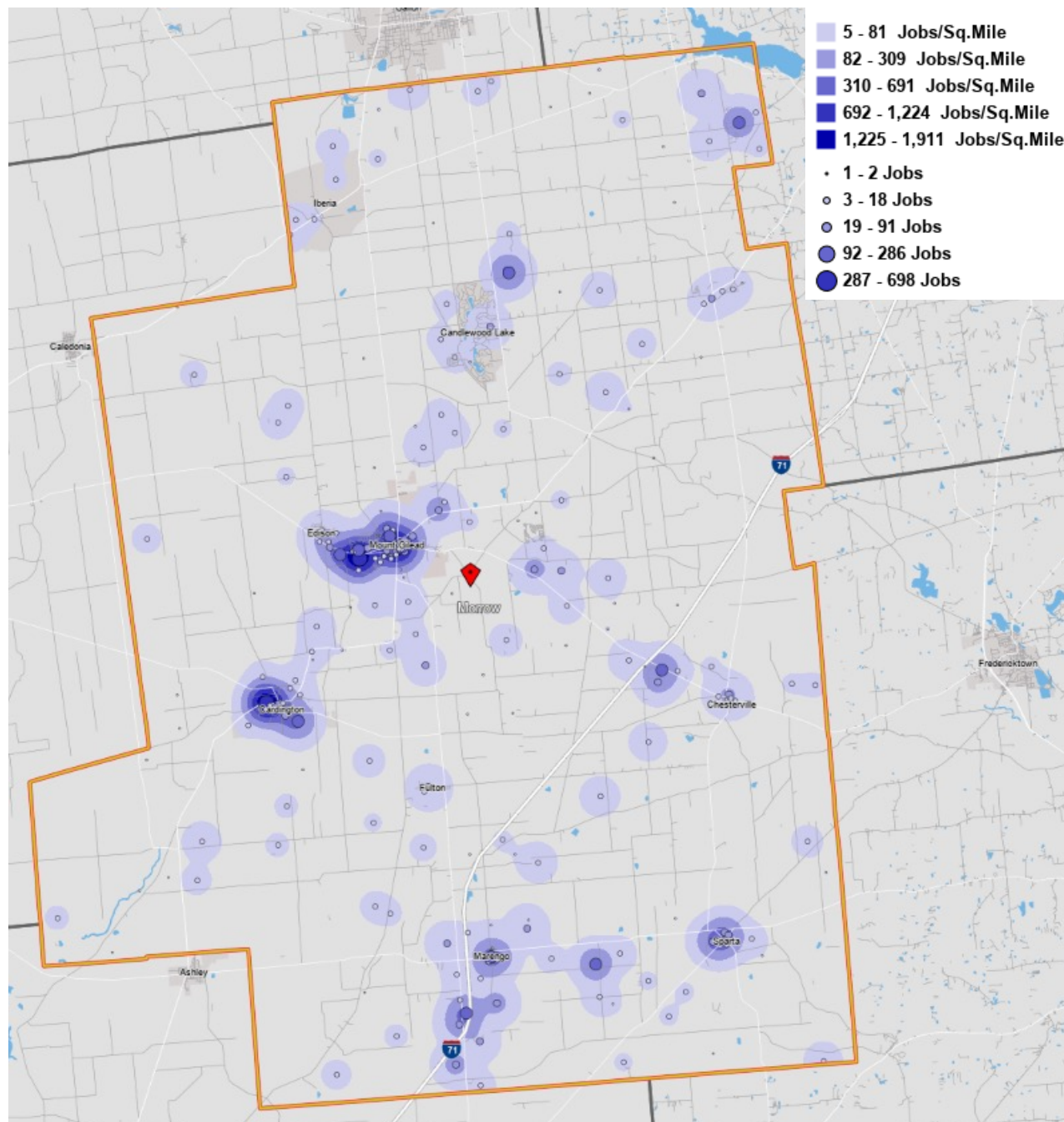
Source: U.S. Census Bureau

Morrow County Workforce Analysis

A region's workforce is a critical measure of its economic success. The retirement of the Baby Boom generation and a lack of alignment between industry and higher education are creating widespread shortages in qualified workforce even in times of high unemployment. A healthy workforce is critical for the future success of a given area. In 2020, central Ohio had a labor force of 1,157,986 and active job openings of 1,186,763.^{iv} While central Ohio is one of the state's only growing regions, it still is not growing a labor force population able to meet current employment needs, with a 28,777 deficit in labor force. Increasing not just the quantity but the quality of jobs can lead to a trickledown effect throughout an entire community. An examination of a community's workforce has five distinct components: the size, unemployment rate, and education level of the workforce; the occupation and earnings of the workforce; and the commuting patterns of the workforce.

While Morrow County's workforce is distributed evenly throughout the county, there are three main corridors where employment has a higher concentration. Mount Gilead provides the highest density of employment throughout the county. With a large concentration of the county's population comes a large amount of retail, commercial and food and beverage locations catering to the dense population center. Mount Gilead is home to County government offices and a downtown business district with locally owned retail and service operations. The village of Cardington has the second highest population density primarily due to the location of companies like Cardington Yutaka Technologies located on the western edge of the village and providing a large amount of employment opportunities for the county. The Interstate 71 corridor which runs from the southern border of the county through the eastern edge is a growing industrial corridor for Morrow County, with two interstate exits that connect the County to major commerce centers such as Cleveland and Louisville, Kentucky. Serving residents all across Ohio, this interstate averages 55,228 daily drivers throughout the portion of roadway spanning Morrow County. With the presence of I-71 and a robust highway infrastructure and proximity to the Marion Industrial Center and its intermodal facilities, major companies like the Dollar-Tree Distribution Center (located at I-71 and State Route 61) have established operations in the County. These three areas currently make up the densest employment distribution within Morrow County as identified in the map of employment distribution.





Source: U.S. Census Bureau

Morrow County Workforce Snapshot

Morrow County Workforce Statistics	Data Points
Civilian Labor Force	18,198
Unemployment Rate	4.5%
Mean Travel Time to Work	29.43 Minutes
Median Household Income	\$61,769
Per Capita Personal Income	\$44,282
Poverty Rate	9.10%

Source: St. Louis Federal Reserve Economic Data, U.S. Census Bureau



Morrow County has a civilian labor force of 18,198, and an unemployment rate of 4.5%. Comparatively, Ohio has a slightly elevated unemployment rate of 5.2%. Morrow County is uniquely positioned between counties of varying economic status. The region where Morrow County is located is a unique mixture of rural and urban demographics. While Morrow County and the counties to the north can be described as primarily rural, the counties of Delaware, Knox and Licking to the south have transitioned from primarily rural communities due to the continued growth of the City of Columbus resulting in a drastic increase in population, jobs and wealth. While these counties still possess some rural qualities they are transitioning into a more urban environment. While Morrow County still maintains a strong rural, agricultural base, the positioning of Interstate 71 and central Ohio's continued growth has had a positive impact on the County with a relatively low unemployment rate and a healthy median household income. A snapshot of the current economic standing for Morrow County and the surrounding counties demonstrates the health of the County compared to the region.

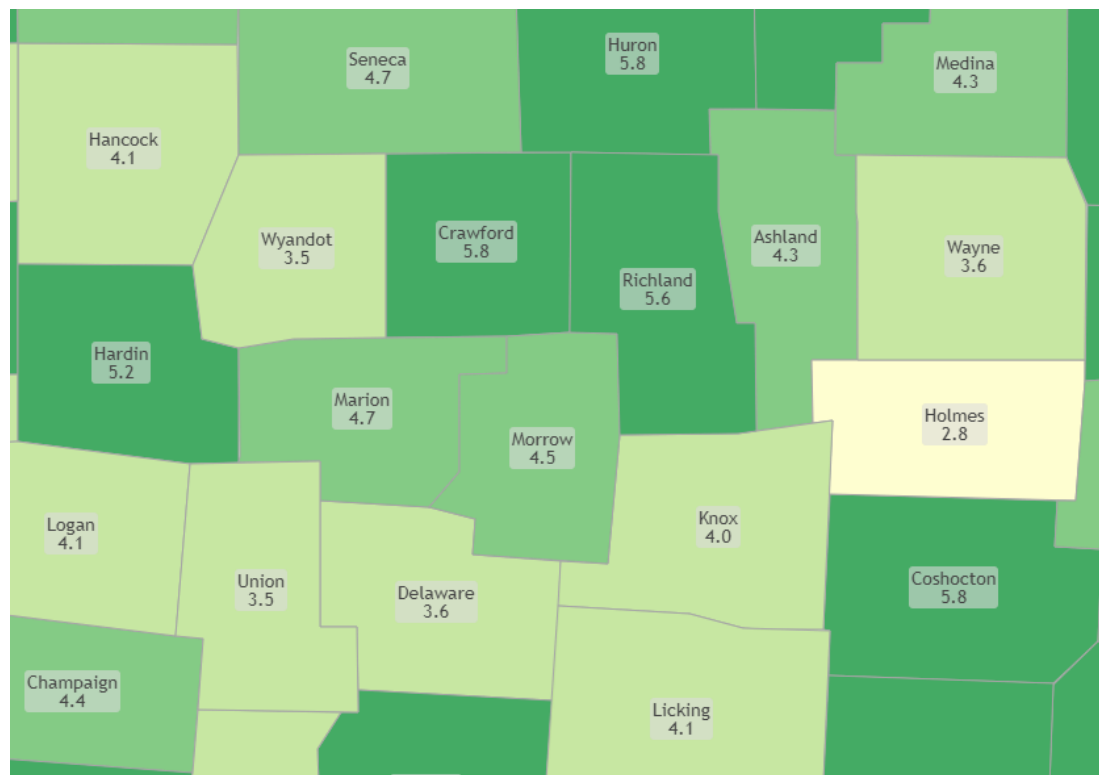
Morrow County Regional Comparison

County Name	Unemployment Rate	Median Household Income	College Graduation Rate
Morrow	4.5%	\$61,769	14.7%
Marion	4.7%	\$52,226	12.9%
Crawford	5.8%	\$45,952	15.3%
Richland	5.5%	\$52,295	17.8%
Knox	4.0%	\$68,050	22.6%
Delaware	3.6%	\$114,423	55.5%

Source: St. Louis Federal Reserve Economic Data, U.S. Census Bureau

Comparing Morrow County to the surrounding area we can see that Morrow County has the third lowest unemployment rate out of the six counties. The two counties bordering the northern edge of the county, Crawford and Richland, currently possess elevated unemployment rates of 5.8% and 5.5% respectively. A majority of the counties located to the south of Morrow County have lower unemployment rates, most likely due to the proximity to the Columbus economy.

Regional Unemployment Rate Comparison

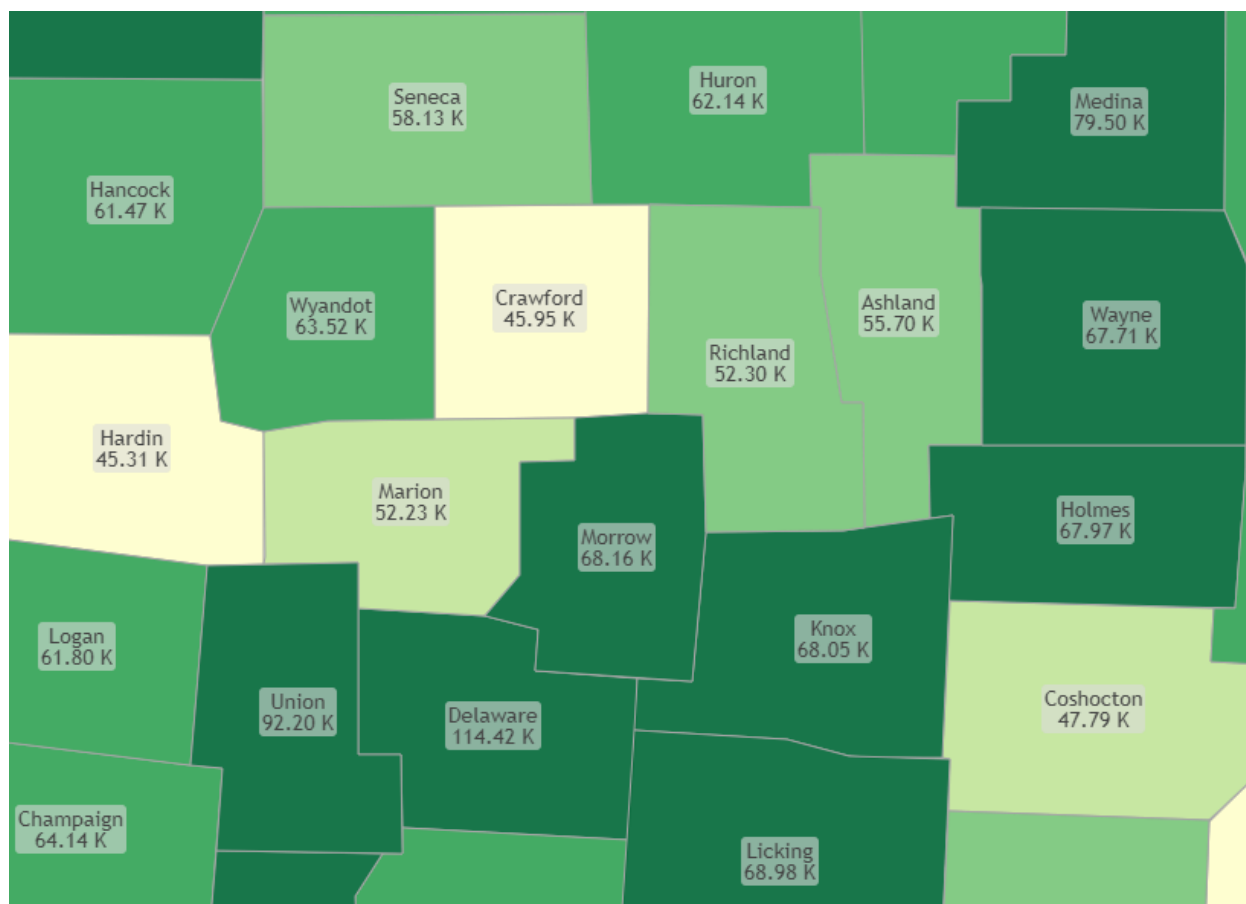


Source: St. Louis Federal Reserve Economic Data



According to the most recent data from the St. Louis Federal Reserve Economic Data, Morrow County's median household income is one of the strongest in the region at \$68,159 and trails only Delaware County which has the state of Ohio's highest median household income of \$114,420, attributed to high-earning residents living in Delaware County and working in the Columbus and central Ohio market. While this figure is slightly higher than the figure reported by the U.S. Census Bureau, both federal sources show Morrow County has routinely outperformed the other four surrounding counties and, due to the location of Interstate 71 and more private sector employers that will be attracted to the region, this number is expected to increase throughout the coming years.

Regional Median Household Income Comparison

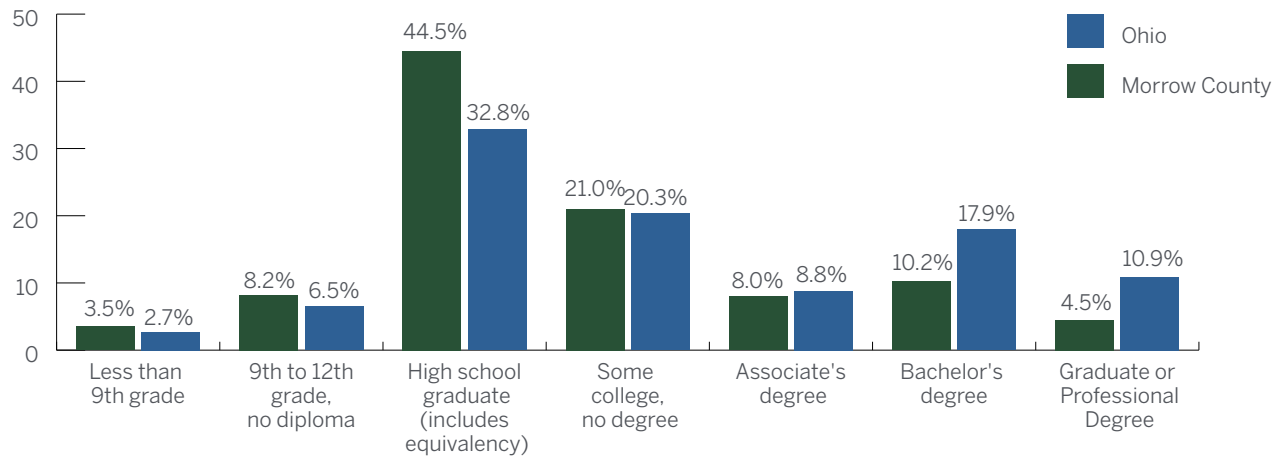


Source: St. Louis Federal Reserve Economic Data

As the graph below depicts, Morrow County has a higher share of residents with a high school diploma compared to the state of Ohio overall. Despite Morrow County having a higher concentration of high school graduates, those residents are not choosing to pursue continuing educational opportunities. While Morrow County lacks higher education facilities, the County is in close proximity to several public and private schools including The Ohio State University with Marion, Mansfield, and Columbus campuses, Ashland University, Columbus State Community College, Franklin University, Marion Technical College, Mount Union University, Mount Vernon Nazarene University, North Central Technical College, Ohio Wesleyan University, Otterbein University, and Kenyon College. Additionally, both Tri-Rivers Career Center and Pioneer Career & Technology Center serve Morrow County and provides numerous technical and certification programs. The residents from Morrow County that do pursue higher education likely leave the county to do so and, as higher education attainment rates suggest, do not return to Morrow County to live and work. Morrow County trails the state of Ohio by 7.7 % in percentage of residents with a bachelor's degree and by 6.4% in the percentage of residents with a graduate or professional degree. These two categories are very important to certain prospective employers when planning future expansions into new areas. For many private sector companies an area must prove they are capable of providing a workforce to fulfill their requirements.



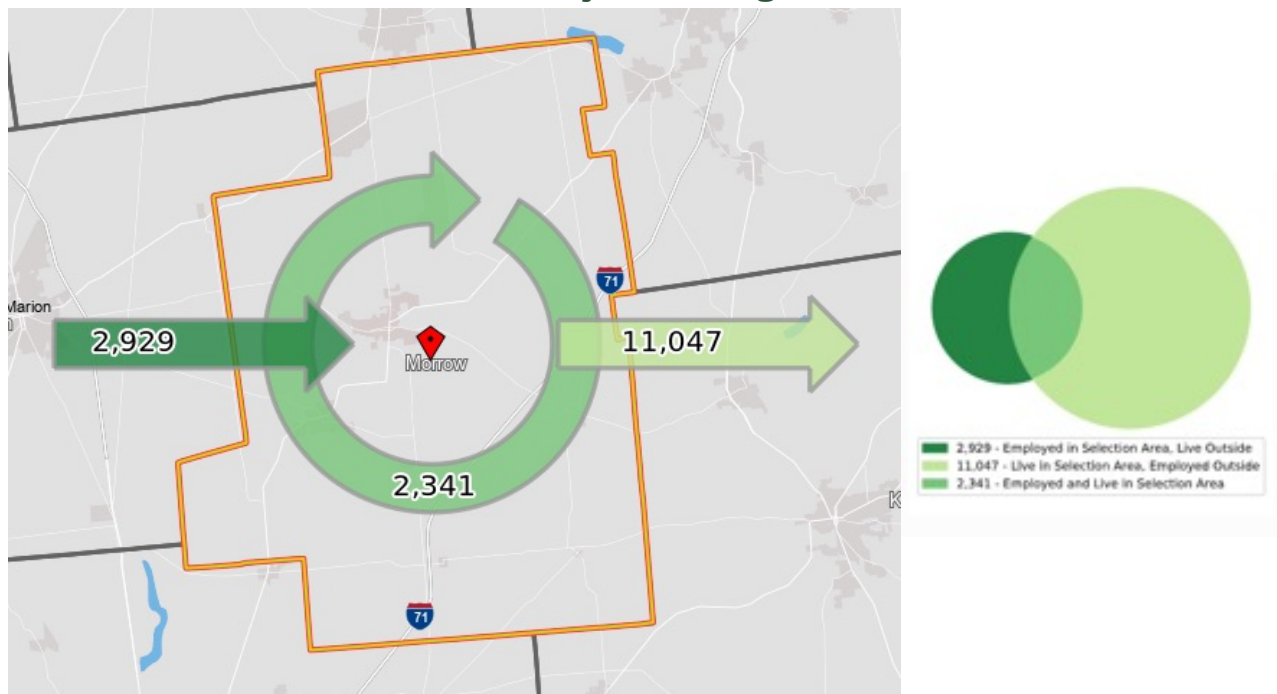
Morrow County Educational Attainment



Source: U.S. Census Bureau

As previously described, Morrow County's proximity to the Columbus metropolitan area provides positive and negative attributes. For the graphic below Morrow County has 13,388 residents living in the County; 11,047 (82.5%) of these residents live in the county but travel outside of county lines for employment and 2,341 (17.5%) of residents are employed and working inside the County. Of the 5,270 total citizens employed inside the County, 2,929 (55.6%) are employed in Morrow County but are living outside of county lines and 2,341 (44.4%) are employed and living in Morrow County. As we can see, Morrow County faces an employee retainment issue due the proximity to major metropolitan areas providing not only a higher quantity of jobs but a higher quantity of high wage jobs. As Morrow County looks to expand their attraction of private firms, the County should focus on ways to grow not only the employment base, but also its residential base.

Morrow County Commuting Patterns



Source: U.S Census Bureau



QUALITY OF LIFE INDEX

Montrose Group's quality of life index (QLI) relies less on traditional cost of doing business measures such as occupational wage rates, construction and real estate costs and other traditional costs of doing business measures that drive larger manufacturing, logistics and industrial or technology based corporate site location projects. Instead, Montrose focuses on aspects regarding social wellbeing, access to healthcare, educational attainment, and more to display the status of a community. These aspects play an important role in creating a healthy community which in turn produces an impact on the economic status of an area. Many companies are more focused on the long-term prospects for a region to succeed and to be attractive to their workers to live.

Quality of Life Index Analysis

Crime Assesses relative risk of crime in seven major crime areas including personal crime, murder, rape, robbery, assault, burglary, larceny, and motor vehicle theft	Housing Ratio of rental cost compared to income, breakdown of home prices by income, eviction rates, and cost of homeownership	Commute Times Average commute times as defined by U.S. Census Bureau compared to state averages
Walkability U.S. Environmental Protection Agency Walkability Index	Healthcare Analyzes premature deaths, adult obesity, uninsured residents, and Primary Care Physicians per resident	Education Assesses statewide performance index rating, high school graduation rate, high school degree or higher attainment, and Bachelors degree or higher attainment
Wealth Measures per capita income, poverty rate, personal savings, and per capita retail sales		

The Montrose Group Quality of Life Index is a multidimensional analysis that scores key aspects of a community and can be thought of as an analysis of a range of objectively measurable community and social wellbeing conditions in seven key areas that are measured nationally and at the statewide level. Federal, state, and proprietary data sources are used to collect and analyze Quality of Life data which are weighted to generate a community Quality of Life score that is then compared to a baseline score of 100. Communities with a baseline score of 100 or higher have a ranking that meets or exceeds federal and state statistics, a score between 60-80 indicates a good ranking, and so on. Much like the federal location quotient statistic, communities with a higher QLI score have an exceptional competitive advantage over other areas. The QLI analysis should be used to understand strengths and weaknesses and identify opportunities to drive change via community development strategies, private sector engagement, and multi-jurisdictional cooperation. This wide scope makes QLI research a powerful, practical, and effective measure of socioeconomic development policies and actions.



Morrow County Crime Index.

Morrow County Crime Index



Excellent

149

*Total Crime Index as compared to the state of Ohio

A *Crime Index* provides a view of the relative risk of crime in a community as compared to the rest of the nation using data from resources such as the Federal Bureau of Investigation's Uniform Crime Reporting system. According to economic theory, crime should decrease as economic growth and opportunity improve. Communities with lower crime indexes suggest higher labor force participation rates, stable wage rates, and lower risk for business operations. The Crime Index is an indication of the relative risk of a crime occurring and is measured against the overall risk at a national level. Values above 100 indicate the area has an above average risk of occurring compared to the US. Values below 100 indicate the area has a below average risk of occurring compared to the U.S.

CrimeRisk is intended to provide an assessment of the relative risk of seven major crime types and their summarization to the block group scale. Relative crime rates are very important in real estate applications, insurance underwriting, shopping center and stand-alone retail facilities. CrimeRisk is a block group and higher-level geographic database consisting of a series of standardized indexes for a range of serious crimes against both persons and property. It is derived from an extensive analysis of several years of crime reports from the vast majority of law enforcement jurisdictions nationwide. The crimes included in the database are the "Part 1" crimes and include murder, rape, robbery, assault, burglary, theft, and motor vehicle theft. These categories are the primary reporting categories used by the FBI in its Uniform Crime Report (UCR), with the exception of Arson, for which data is very inconsistently reported at the jurisdictional level.

Crime Indexes provide a view of the relative risk of specific crime types. It is not a database of actual crimes, but rather the relative risk in an area compared to the United States in its entirety. Updated semiannually, the database includes indexes for several categories of personal and property crime. Morrow County has a Crime Index of 149, which registers as an Excellent index rating and demonstrates the low relative risk of crime and the overall safety and well-being of the community. An Excellent Crime Index score will be important to the attraction of residential housing investments, the attraction of residents to the community, and the attraction of private sector investment into Morrow County.

Morrow County Housing Index.

Morrow County Housing Index



Excellent

113

*Housing Index as compared to state of Ohio (Rent by income, Home cost by income, Vacancy rate, Homeownership rate)



Housing is an essential sector of the economy and makes up the largest component of an individual’s wealth at almost a third of the total assets.^v Quality housing must not only be reflected in the structural aspects of a home, but also in average prices. For individuals, the lower the price, the better. For communities, the higher the price of housing, the better as property values translate into tax base. However, adequate housing across multiple price points can also facilitate labor mobility within an economy and as communities grow, corresponding growth of residential housing options must also keep pace. When looking at building a better community, housing affordability and availability is key to ensuring mobile talent considers your community as a viable community to live in and there is adequate housing stock to choose from. Morrow County residents spend less money on rent and mortgage costs when compared to the state of Ohio. The vacant property rate in Morrow County (7.86%) is slightly below the state average of 8.27% which can be attributed to the high percentage of homeownership in Morrow County and the affordability of housing as a percentage of overall income. When looking at the surrounding counties of Crawford, Delaware, Knox, Marion, and Richland, the average median gross rent is \$789, the average home value is \$159,460, and the average homeownership percentage is 71.44 percent. Of these counties, Delaware County has the highest median gross rent (\$1,118), has the highest average home value of \$320,000 and has the highest homeownership percentage of 80.7 percent. Compared to these neighboring counties, Morrow County has comparable rent rates, competitive average home values, and the highest homeownership percentage. Morrow County’s homeownership rate is also significantly higher than the rest of the state of Ohio. Overall, Morrow County scores Excellent in the Housing Index analysis and with affordable housing prices and access to metropolitan and suburban areas, is an attractive location in central Ohio to live.

Housing Comparison

Area of Study	Morrow County	Ohio
Median Gross Rent	\$773	\$1,096
Rent Cost by Income	15.02%	17.03%
Average Home Value	\$154,900	\$229,800
Home Cost by Income	23.80%	26.55%
Vacancy Rate	7.86%	8.27%
Homeownership Percentage	82.5%	66.3%

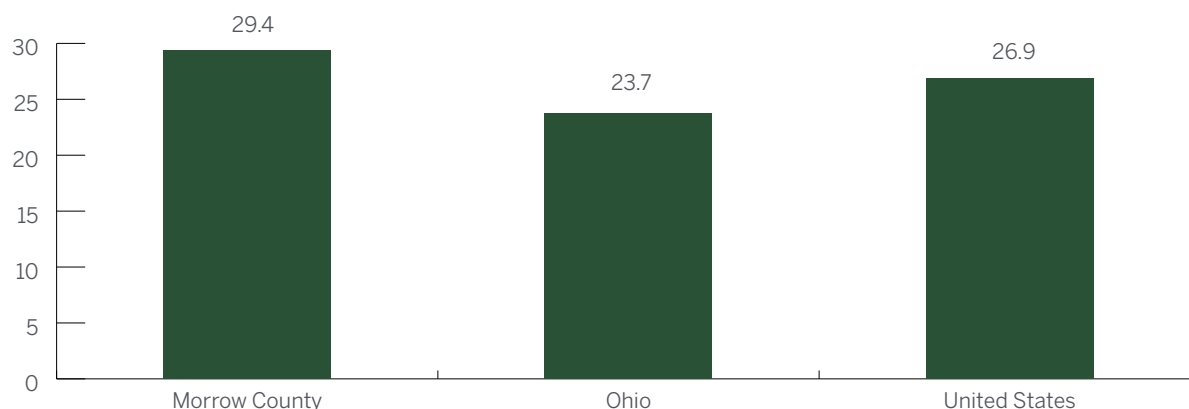
Source: U.S. Census Bureau

Morrow County Commute Time Index.



Commute Times vary depending on the geographic locations and access to multiple modes of transportation. A diverse transportation network shortens commute times, increases company productivity and competitiveness, and increases access to a broader pool of talent. Arduous commutes may deter talent from considering jobs in a given location.^{vi} As businesses look to communities with strong quality-of-life features, convenient locations, and ease of travel to work by car, bike, or foot should be considered. Morrow County has a higher mean commute time when compared to the State of Ohio and the United States. During an average five-day work week, Morrow County residents will spend an average of 28.5 minutes more commuting to work than the average Ohio residents. Assuming the average citizen works five days a week for 49 weeks out of the year, the average Morrow County resident will spend 23.27 hours more commuting to work compared to the rest of the state.

Mean Commute Time Analysis



Source: United States Census Bureau

Morrow County has invested significantly in road improvement projects in recent years, with the approval of a license tax and a county road levy that have generated financial resources to dedicate to roadways throughout the county. The Morrow County Commissioners have also built strong partnerships with the Mid-Ohio Regional Planning Commission (MORPC) and Central Ohio Regional Planning Organization (CORPO) to analyze and prioritize current and future transportation infrastructure needs that will support economic development and enhance mobility throughout the county. Through this partnership with MORPC and CORPO, Morrow County was awarded a \$200,000 grant, matched by \$50,000 in Morrow County funds, for upgrading the State Route 61 and State Route 229 intersection. In November 2022, Governor Mike DeWine announced \$3.6 million in traffic safety funding for the State Route 61 and State Route 229 intersection upgrades to start in 2025. This investment will improve traffic flows, enhance safety, and improve commute times for residents and the workforce in Morrow County. Morrow County should continue its partnership with MORPC and CORPO to plan for and address future transportation infrastructure priorities, including improvements to the State Route 95 and Interstate 71 interchange, and work in partnership with MORPC and CORPO to pursue state and federal funding for these strategic transportation improvement projects.

Morrow County Walkability Index.

Morrow County Walkability Index

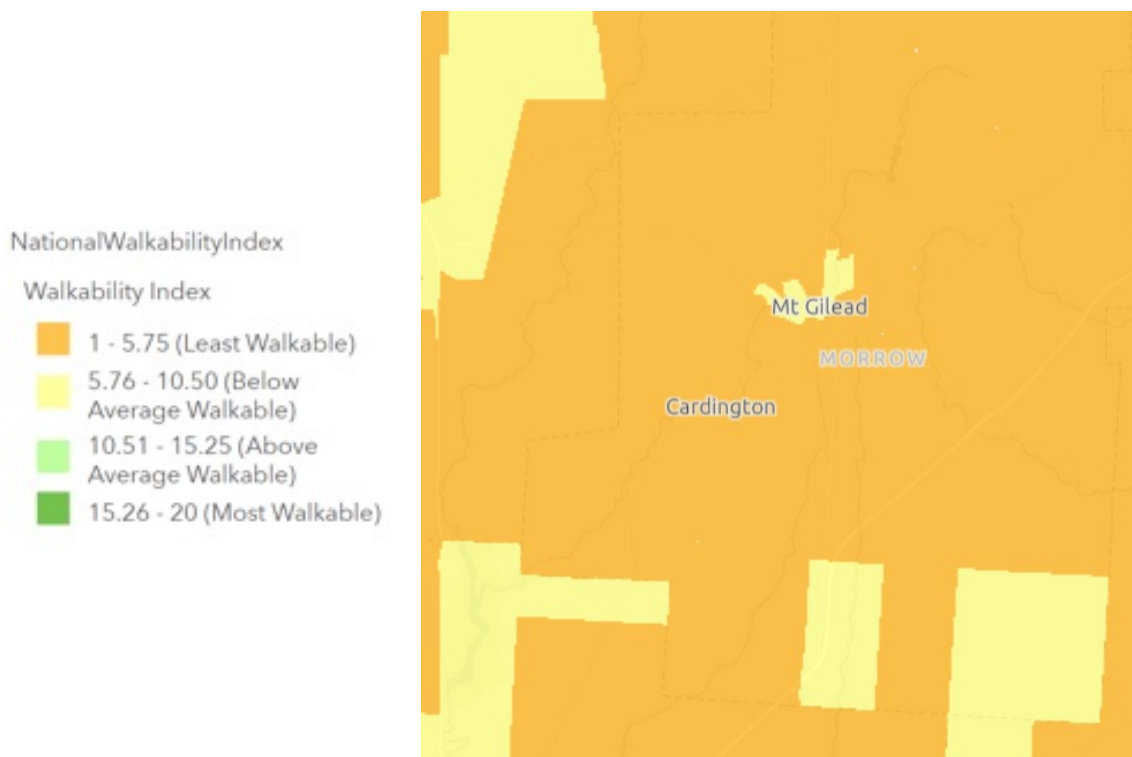


A *Walkability Index* is a nationwide geographic ranking system led by the U.S. Environmental Protection Agency. The Walkability Index uses selected variables on density, diversity of land uses, and proximity to transit to calculate the ease of walking around. Walkable communities vary depending on population and land mass (urban, suburban, rural) and take into account access to public transit.^{vii} The EPA's Walkability Index covers every census block group in the nation, providing a basis for comparing walkability from community to community. Selected variables incorporated into this index include:



- Intersection density - higher intersection density is correlated with more walk trips
- Proximity to transit stops – distance from population center to nearest transit stop in meters where shorter distances correlate with more walk trips
- Diversity of land uses:
 - Employment mix – the mix of employment types in a block group (such as retail, office, or industrial) where higher values correlate with more walk trips
 - Employment and household mix – the mix of employment types and occupied housing such that a block group with a diverse set of employment types (such as office, retail, and service) plus many occupied housing units will have a relatively high value and higher values correlate with more walk trips.^{viii}

Morrow County Walkability Index



Source: U.S. Environmental Protection Agency

Morrow County features relatively low walkability and bike scores throughout the county. The county is deemed “car-dependent” indicating that most or all errands require a car. This index was used to compare a cross-section of eight communities in Morrow County. All eight studied areas reported a bike score below 49 and these areas are considered to have minimal bike infrastructure. Communities that walk more often are impacted in a variety of positive aspects. Walking can provide increased health benefits and promote an inclusive community.^{ix}

Name	Walk Score	Bike Score
Mount Gilead	45	36
Cardington	34	34
Marengo	28	N/A
Fulton	14	31
Chesterville	17	24
Edison	23	31

Source: Walkscore

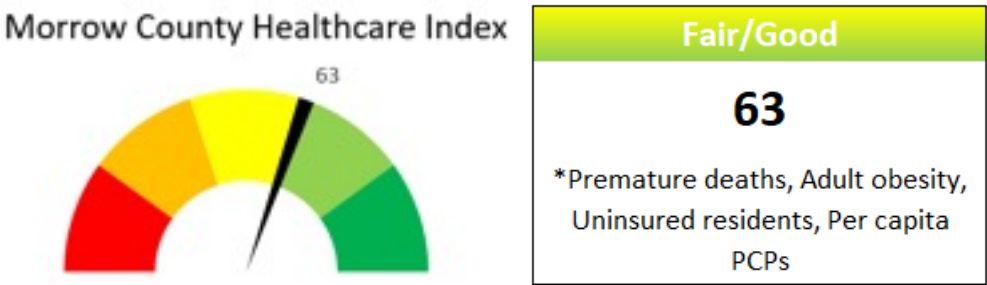


Morrow County has a Morrow County Park District that manages numerous nature preserves, park systems, and trails that are unique to each location. Ohio Park Districts are organized under Ohio Revised Code Chapter 1545 and park districts have numerous powers as it relates to preserving and protecting unique natural habitats and historical landmarks and can acquire land, easements, and secure leases. A Park District works with local governments, park districts, private organizations, and the Ohio Department of Natural Resources to ensure the best assets of a natural environment are protected for future generations. Since 2018, the Morrow County Park District has leveraged more than \$4 million in grants and private donations to enhance greenspace throughout the county.

Morrow County and its transportation agencies such as MCAT should determine ways to increase mobility throughout the county via alternative transportation routes such as bike paths and walking trails. Programs such as ODOT’s Transportation Alternatives Program (TAP) provides funding for projects defined as transportation alternatives, including on- and off-road pedestrian and bicycle facilities, infrastructure projects for improving non-driver access to public transportation and enhanced mobility, community improvement activities, and environmental mitigation; recreational trail program projects; and safe routes to school projects.^x Currently, MCAT is developing a project to connect Mount Gilead State Park to the village of Mount Gilead and is pursuing ODOT funding.

While the U.S. EPA Walkability Index for Morrow County is rated as Good, several communities in the county have made improvements to sidewalks to enhance mobility and safety for residents. Additionally, many of these communities have created access to various retail establishments and basic needs for residents. For residents needing public transportation, the Morrow County Area Transit (MCAT) service is offered to all residents.

Morrow County Healthcare Index.



Access to health care and services, and improving health outcomes, can demonstrate the health and wellbeing of a community. A *Healthcare Index* considers access to health care services and helps identify underperforming markets where barriers to health care such as social, racial, economic and physical factors may exist, and where there are markets that have the services needed to support healthy living.^{xi} The 2022 County Health Rankings used data from 2019 for this measure. Morrow County has five reported primary care physicians throughout the county that represents one primary care physician (PCP) per every 7,000 residents. The state of Ohio County Health Rankings reports a roughly 5,890 PCP ratio for every one resident in the county as shown in the health comparison table below.

Morrow County ranks 82nd out of the 88 total counties in Ohio and has a significantly higher rate of population to primary care physicians when compared to Ohio and the nation. Morrow County has a lower rate of premature deaths than the state of Ohio although, the county features a higher rate of adult obesity and uninsured residents. The health of a community is not only important to the individual, but to the economy of a community as well. As the population ages, workers begin to leave the work force and move into retirement. If a community features an overall negative healthcare system a community’s workforce will be directly impacted. Workers will leave the labor force at a younger age and be required to spend more disposable income on healthcare needs. Morrow County is home to the Morrow County Hospital and is near central Ohio which has an abundance of healthcare providers that are likely serving the Morrow County population with specialized medical care. Community health assessments, typically led by the local health department, can help identify voids in healthcare services and prioritize enhancing services and specialized care.

Health Comparison

Area of Study	County	Ohio	Percent
Premature Death	8,400	8,700	3.51%
Adult Obesity	40.0%	35.0%	-13.33%
Uninsured Residents	9%	8%	-11.76%
Primary Care Physicians Per Person	5,890:1	1,290:1	-128.13%

Source: Ohio County Health Rankings, U.S. Census Bureau

Morrow County Education Index.

Morrow County Education Index



Excellent

88

*Ohio Department of Education PI ranking,
Graduation rate, HS degree or higher,
Bachelor's degree or higher

The strategy for communities looking to attract talent and grow population should include an analysis of Education. Educational attainment has long been a cornerstone for business retention, expansion, new business attraction, and entrepreneurship. The level of education and occupational skills found in communities traditionally correlates to demonstrated economic growth and stability. Approximately half (51.4%) of all entrepreneurs hold at least a bachelor's degree.^{xiii} From an individual's perspective, higher educational attainment is generally linked to better employment prospects, higher income, and a better quality of life. And from a Placemaking and QLI standpoint, communities should maximize opportunities to attract a skilled workforce that will not only fill existing jobs but will attract new employers and generate entrepreneurial activity that will draw in new entrepreneurs and business start-ups.

The Performance Index is a calculation that measures student performance on the Ohio Achievement Assessments/Ohio Graduate Tests at the 3rd, 4th, 5th, 6th, 7th and 8th grade levels and English I, English II, Algebra I, Geometry, Integrated Math I and Integrated Math II.^{xiii} The average performance index school score for Ohio schools in 2022 was 77.048. All school districts within Morrow County were awarded higher performance index scores than the state average. In 2021 the statewide graduation rate for Ohio was 87.2%. All four Morrow County school districts featured graduation rates above this statewide average, with Highland Local and Northmor Local showcasing graduation rates over nine percent higher than the state average. Overall, the four school districts present higher student performance and graduation rates than many other schools within Ohio. Morrow County also features a slight advantage in per pupil expenditure with an average of \$31.68 in spending per pupil compared to the state of Ohio. Morrow County lags the state averages in residents that have obtained high school or bachelor's degrees. Overall, Morrow County has well developed local school districts, but struggles to retain educated individuals within the county.

Countywide Education Comparison

	County	State	Percent
PI Ranking	82.4	77.1	6.71%
Graduation Rate	93.3	87.2	6.76%
HS or Higher	83.3%	90.8%	-8.62%
Bachelor's Degree	15.0%	29.0%	-63.64%
Per Pupil Expenditure	\$10,321.00	\$10,289.32	0.31%

Source: Ohio Department of Education, U.S. Census Bureau



Local School District Overview

	Graduation Rate	2022 PI for Ranking	2022 PI Ranking	2022 Achievement Rating*
Northmor Local	97.3	87.007	283	4 Star
Highland Local	97.8	85.926	308	4 Star
Cardington-Lincoln Local	87.7	79.184	467	3 Star
Mount Gilead Exempted Village	89.4	77.686	497	3 Star
State of Ohio	87.2	79.3	Out of 859 Districts	3.483 Star

Source: education.ohio.gov, <https://www.ed.gov/>.

The Ohio Department of Education Report Cards are designed to give parents, communities, educators and policymakers information about the performance of districts and schools. The Ohio Department of Education assesses multiple facets of school district performance including: **Achievement** – represents whether student performance on state tests met established thresholds and how well students performed on tests overall; **Early Literacy** – measures reading improvement and proficiency for students in kindergarten through third grade; **Graduation** – looks at the four-year adjusted cohort graduation rate and the five-year adjusted cohort graduation rate; **Progress** – looks closely at the growth all students are making based on their past performances; Gap Closing – measures the reduction in educational gaps for student subgroups; and **College, Career, Workforce and Military Readiness** – looks at how well prepared Ohio's students are for future opportunities, whether training in a technical field or preparing for work or college.^{xiv} Local school districts are given a ranking and achievement rating based on the following scale.

ACHIEVEMENT COMPONENT RATING SCALE AND DESCRIPTIONS		
Percentage of Maximum Points Earned	Rating	Rating Description
Greater than or equal to 90% of Max Score	5 Stars	Significantly exceeds state standards in academic achievement
Greater than or equal to 80% but less than 90% of Max Score	4 Stars	Exceeds state standards in academic achievement
Greater than or equal to 70% but less than 80% of Max Score	3 Stars	Meets state standards in academic achievement
Greater than or equal to 50% but less than 70% of Max Score	2 Stars	Needs support to meet state standards in academic achievement
Less than 50% of Max Score	1 Star	Needs significant support to meet state standards in academic achievement

Source: Ohio Department of Education - <https://education.ohio.gov/getattachment/Topics/Data/Report-Card-Resources/2022-Report-Card-Guide.pdf.aspx?lang=en-US>

Morrow County Wealth Index.

Morrow County Wealth Index



Excellent

105

*Per capita income, Poverty rate, Personal savings per capita, Retail sales per capita



Wealth in a QLI analysis considers education and income, however it also looks at the wealth of a community. Is a community's tax base growing? Are property values increasing? Are homeownership rates strong? Are residents actively engaged in the workforce? While these factors are analyzed individually, collectively they paint a strong picture for the future of a community. Morrow County is comparatively better than Ohio and the nation in terms of population in poverty, owner occupied housing units and civilian labor force. These factors show that Morrow County can create a healthy ecosystem for economic and social growth. Morrow County should leverage these elevated population statistics when attracting prospective business opportunities. Low poverty rates and high per capita incomes are two of the main foundations for maintaining a healthy community. These aspects have impacts on a community that help promote small business growth, attract large private investment, and create healthy social interactions. Morrow County is slightly lower than the state averages in per capita income, total assets, and total earnings, however the population has a lower level of liabilities. The poverty rate in Morrow County is 3.4% below the state average. Overall, Morrow County is excellent in standing and should continue efforts to generate high-wage jobs and generate wealth in the community.

Wealth Comparison

Area of Study	Morrow County	Ohio
Per Capita Income	\$30,098	\$32,465
Poverty Rate	9.00%	13.40%
Assets	\$158,860	\$171,362
Earnings (interest, dividends, trust income, etc.)	\$1,505	\$1,591
Liabilities	\$23,163	\$26,057

Source: U.S. Census Bureau, Federal Deposit Insurance Corporation

Quality of life is a dynamic concept that ranges over evolving objective and subjective measures. Determining quality of life is crucial to understand a community's overall contentment. Increasing quality of life measures impacts both social and financial standings of residents. Overall, Morrow County can be considered average when taking all of these factors into account. The best performing sectors for Morrow County are a low crime rate index, a high housing index, and a high education index. With lower crime rates than many of the surrounding counties and the state, Morrow County is considered a generally safe community. A high housing index indicates the affordable nature of housing and the homeownership rates that exceed surrounding communities and the state overall. A strong education index demonstrates Morrow County school districts are providing high quality education for the future workforce pipeline. Healthcare and walkability are the two lowest performing indicators. With relatively little healthcare infrastructure and low walkability scores, Morrow County has room to improve in these standards which ultimately lead to enhanced quality of life. Improvement in these lagging indicators can provide substantial benefits to the residents involved directly in these areas. Healthcare and walkability also directly impact each other, with improved walkability having a direct impact on the wellbeing of residents. Government systems play a direct role in quality of life, from funding to public schools and offering more affordable healthcare.

ECONOMIC CONCLUSIONS

Morrow County remains positioned for growth alongside the emergence of central Ohio as a rising economic leader. Morrow County has become a prime location for business attraction and economic development investment with more than \$1 billion in investment and up to 3,500 jobs considering the community in recent years. Morrow County will continue to see economic development and private sector investment interest with the burgeoning capital investment announcements made in central Ohio. These developments that will commence in the area will provide future employment, careers, and quality of life for the residents. Morrow County is abundant in many powerful economic factors including available land, location, and community involvement. While these factors will help to provide the foundation for Morrow County's future, there are aspects that need to be addressed. Below will describe the overarching strengths, weaknesses, opportunities, and threats that exist in Morrow County.

MORROW COUNTY SWOT ANALYSIS

<p>Strengths</p> <ul style="list-style-type: none"> • Morrow County has an abundance of developable land and reasonable permit fees. • Morrow County is an affordable community to live and work in, which has attracted people from central Ohio region. • The proximity to strong and emerging industries will provide an abundance of growth opportunities. • Interstate 71 traverses the county with interchanges at State Routes 95 and 61 where development opportunities exist. • Robust career development/talent retention strategy among K-12, higher education, businesses, and county government. • Proximity to multiple high-tier educational centers brings substantial workforce development, talent attraction and research & development opportunities. 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Need updated countywide economic development strategy for business retention, expansion, and new business attraction. • Need for CEO roundtable-style networking opportunities to build interconnected business community. • Develop broader zoning strategies to guide development. • As a headwaters county, sufficient wastewater capacity is a challenge. • Currently available natural gas supply for industry expansion is limited. • The tourism industry is an asset to Morrow County that should have more robust promotion and marketing to attract visitors. • Lack of available housing inventory to attract workforce and residents to county. • Lack of access to healthcare services and primary care physicians
<p>Opportunities</p> <ul style="list-style-type: none"> • Interstate 71 interchanges, coupled with necessary infrastructure investments, presents competitive sites for new business attraction. • Morrow County has increasing development interest in manufacturing and distribution industry sectors. • Morrow County is positioned to obtain new advanced manufacturing opportunities due to Intel investment. • Need to increase resident hiring efforts for in-county jobs and overall workforce participation. • Downtown areas of Morrow County's largest population centers are prime for new small business opportunities. 	<p>Threats</p> <ul style="list-style-type: none"> • Future development opportunities in Morrow County should be intentionally driven around key development areas, while preserving agricultural and rural attributes. • Retaining the youth of Morrow County to develop a pipeline of future workforce. • Need to increase residential housing stock across multiple price points to spur population growth. • Morrow County should continue to address dilapidated areas of the county. • Maximizing currently available utility resources.

Listen Sessions Report

In August of 2022, Montrose and the Morrow County team conducted four listen sessions with representatives of the community. The four groups engaged members of the education, government, community organization and business leader sectors. The listen sessions were conducted via one-on-one interviews and stakeholder group discussions and each participant was given a county economic overview and questionnaire prior to the sessions, which is included as Appendix A to the report. Listen sessions were informative and provided the Morrow County team the opportunity to understand the opportunities that exist and what the community wants to see by way of economic development. Challenges and opportunities were also identified in the listen sessions and are outlined below.



Morrow County Listen Session Top Identified Challenges & Opportunities

- **Enhance economic development service offerings to existing and new businesses.**
- **Attracting new residents and building the local workforce to meet existing and future business needs.**
- **Government involvement with development will support new investment opportunities.**
- **Develop business attraction strategy that capitalizes on existing industry strengths and attracts businesses in emerging sectors such as distribution and semiconductor supply chain.**
- **Increasing interest in development along highway corridors is an asset**
- **Enhance promotion of tourism assets and community events for local residents and visitors.**

Each listen session provided its own perspectives on the current state of economic development efforts in Morrow County and the future opportunities that exist to realize economic development successes in the community. Participants in the listen sessions were upfront, honest, optimistic, and forward-thinking. Common elements emerged in each session that can help guide the leaders of Morrow County in its decision-making process about targeted economic development initiatives and partnerships. A summary of common themes identified in the listen sessions includes:

Morrow County Stakeholder Interview	Interview Responses
1. What is your understanding/impression of the economic development successes and efforts of Morrow County? How would you rate its effectiveness?	<ul style="list-style-type: none"> • Development of a comprehensive and strategic economic development plan will help Morrow County to effectively attract new business investment. • Local government cooperation has improved over recent years, to the benefit of the county. • Local economic development team provided efficient and valuable support for new business investment in Morrow County, including access to incentives and site development assistance. • Enhanced zoning efforts have helped support development in Morrow County. • Business leaders have strong interest in a CEO roundtable concept to build stronger relationships within the business community. • Small businesses need more resources to assist their growth.
2. What are the priority hurdles or challenges, which currently impact Morrow County from attracting new investment?	<ul style="list-style-type: none"> • Developing and communicating a streamlined economic development process is needed. • Providing workshops to review current economic development programs and funding opportunities would be beneficial to community stakeholders. • Engaging young residents in volunteering opportunities is important to building future leaders. • Attracting new residents and workers into Morrow County is needed. • Retaining youth is important to the future of Morrow County. • Ohio needs shovel ready mega sites, which could be an opportunity Morrow County could pursue to attract new companies. • A public-private partnership economic development organization model would be an asset to the county.



Morrow County Stakeholder Interview	Interview Responses
3. What industry sectors, either existing or new, should be a focus for economic development to encourage economic growth?	<ul style="list-style-type: none"> • Success in transportation and warehousing and manufacturing sectors create strong business attraction opportunities. • Capitalizing on rail served site to attract new investment is an asset for Morrow County. • Enhancing communications around existing assets (tourism, location, rural landscape, low cost of living, etc.) and developing new attractions/events are important to attracting visitors, new residents, and new businesses. • Having diversified workforce/employment opportunities is important to engaging job seekers with diverse skill backgrounds. • Morrow County needs to assist local businesses in advertising their services. • Diversifying business offerings will help keep residents shopping locally and bring in visitors, including: <ul style="list-style-type: none"> - A need for more local restaurants and retail - Create more local attractions - Consider need for new hotels • Need additional housing stock in Morrow County to attract new residents: <ul style="list-style-type: none"> - Necessity for diverse housing opportunities - Placing housing developments in key locations is crucial to the future of Morrow County
4. What is the appetite from the private sector to invest and/or partner in economic development efforts?	<ul style="list-style-type: none"> • Strong interest in developing along Interstate 71 interchanges. • Housing developers are interested in Morrow County, but infrastructure investments and incentives to accommodate new housing may be needed. • Communities and private developers should partner together to attract new businesses into vacant downtown storefronts. • Morrow County's local education centers are prepared to work with local business leaders to develop the workforce.
5. Does the community support the use of tax abatements and public finance tools like Tax Increment Financing to encourage development and fund infrastructure?	<ul style="list-style-type: none"> • Morrow County should use incentive tools, such as tax abatements, to attract new businesses and support existing business expansions in a competitive manner: <ul style="list-style-type: none"> - Creating new jobs with strong wages should be a priority when deciding what incentives are offered. - Local companies have benefitted from incentives, which has benefited Morrow County as a whole. • Working with local, regional, and state partners to leverage additional economic development financing and incentives tools will enhance Morrow County competitiveness for new investment. • Continued use of incentives and public finance tools is valuable to attracting new businesses and new investments into the community. Morrow County should benchmark with other central Ohio counties to make sure it is competitively offering incentives to projects.

MORROW COUNTY ECONOMIC DEVELOPMENT ACTION PLAN TACTICS

In order to achieve continued prosperity over the next five years, build on the successes around manufacturing and transportation and warehousing sector investments, capitalize on emerging industry sectors such as the semiconductor supply chain, and diversify the Morrow County economy, Morrow County's economic development department needs to enact the following action plan tactics.

1. Establish standalone Economic Development Organization via Public-Private Partnership model that brings together government and private sector stakeholders to prioritize, implement, and fund comprehensive economic development and site development priorities.
2. Morrow County should develop economic development and site development priorities that support existing business needs, builds a strong network off Morrow County business leaders, and encourages investments that creates high-value jobs and enhances the wealth of Morrow County and its residents.
3. Implement Morrow County Industrial Site Development Marketing Strategy around key sites along the Interstate 71 corridor in leading and emerging industry sectors which include Advanced Manufacturing, Semiconductor Supply Chain, and Logistics & Distribution and develop an incentives policy to attract new investment to key sites.
4. Morrow County should support private, developer-led residential investments to increase the overall housing inventory in Morrow County which will support the attraction of a diverse cross-section of talent.



Morrow County Economic Development Action Plan Tactic #1 – Establish a standalone Economic Development Organization via Public-Private Partnership model that brings together government and private sector stakeholders to prioritize, implement, and fund comprehensive economic development strategies and countywide tourism priorities.

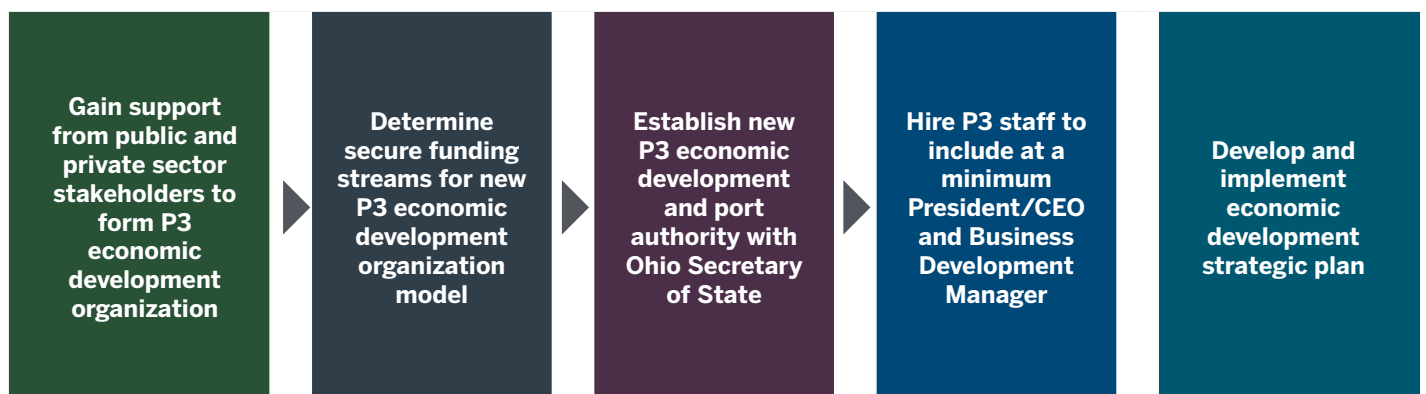
To meet Morrow County's economic development goals, the county should focus on forming a new Public-Private Partnership economic development organization to lead business retention and expansion, new business attraction, site development, and countywide tourism efforts that enhance the community's economic well-being and quality of life. Morrow County has a strong and growing industrial base and is home to many tourism attractions that bring in visitors from around the country, including the Mid-Ohio Sports Car Course, Cardinal Shooting Center, Heartland Retreat Center, and Groovy Plants Ranch. The county also features many exceptional artisan dining experiences and gourmet food establishments such as Bunker's Mill Winery, Kokoborrego Cheese, and the Owl Creek Produce Auction largely supplied by an extensive Amish population.

Morrow County has tremendous infrastructure assets and availability of land around two exits on the Interstate 71 corridor. The availability of land and public infrastructure in proximity to these interchanges creates opportunities for Morrow County to utilize economic development and site development mechanisms to attract private sector investment and job creation. Morrow County should consider establishing these economic development and site development structures under a Public-Private Partnership organization to effectively implement these priorities.

Morrow County should establish a standalone Economic Development Organization via Public-Private Partnership model that brings together government and private sector stakeholders to prioritize, implement, and fund comprehensive economic development strategies.

To meet Morrow County's economic development goals, the county should focus on a number of core objectives over the next five years that include establishing a standalone Public-Private Partnership, setting goals and objectives of the organization to include a coordinated Business Retention & Expansion program, engaging in the site development business, supporting a coordinated countywide tourism marketing strategy, and providing a focus on advanced manufacturing, logistics and distribution, and semiconductor supply chain sectors for future growth. Establishing a Public-Private Partnership will require private and public sector fundraising and identification of potential revenue streams from program administration comparable to peers in other like communities to build a successful economic development team and to enhance the brand and focus of the organization.

Morrow County Public-Private Partnership Organizational Model



Public-Private Partnerships (PPPs) have been used since the 1990s for a myriad of economic and community development related activities, but primarily as a means to fund public infrastructure projects such as roads and bridges, water and sewer, and even vertical infrastructure such as speculative industrial facilities.^{xv} PPPs can be broadly defined as a long-term contract between a private party or parties and a government entity to provide a public asset or service in which the private party bears financial investment and management responsibility and remuneration is linked to performance.^{xvi} Under a Public-Private Partnership economic development model, private-sector innovation and financial support is coupled with public sector activities to elevate the impact of economic activity in a community. Under the PPP model there are several organizational structures Morrow County should consider when creating a new economic development organization, including community improvement corporation and port authority structures that provide broad powers for economic development purposes.

Community Improvement Corporations. A Community Improvement Corporation (CIC) is the most basic form of an economic development corporation and is organized as a not-for-profit corporation with a very public purpose. Community Improvement Corporations (CICs) are quasi-governmental non-profit corporations authorized under Chapter 1724 and organized under Chapter 1702 of the Ohio Revised Code. Generally, there are two types of Community Improvement Corporations (CICs), including traditional CICs which are for the purpose of economic development, as well as CICs organized as County Land Reutilization Corporations, commonly known as County Land Banks. CICs formed for economic development purposes are established for the purpose of *“advancing, encouraging, and promoting the industrial, economic, commercial, and civic development of a community or area.”*^{xvii} CICs are established by filing Articles of Incorporation with the Secretary of State of Ohio. The Articles must designate a Statutory Agent, location and purpose and the Attorney General of Ohio reviews and approves Articles of Incorporation. A CIC must also adopt a Code of Regulations or Bylaws, which designates a Board of Directors and Officers that are responsible for governing the CIC.^{xviii} There is no limit to the size or manner of appointment of members to the Board of Directors, except that if the CIC is a “designated agency” for a local government, at least 40% of the Board must be elected or appointed by officials of the political subdivision(s) which established the CIC. Typically, CICs are established so they can act as “designated agents” for local governments, and in their behalf, perform and provide economic development programs and assistance.

CICs have broad power to assist local governments with economic development programs and services as delineated in Section 1724.02 of the Ohio Revised Code. Unique powers and authority of CICs include:

- Borrowing money for any purpose of the CIC
- Providing loans to individuals for businesses
- To buy, lease, sell real or personal property
- To acquire the good will, business rights, real or personal property, and assets of an individual or business
- To charge fees to political subdivisions for services
- Entering into contracts with federal, state, and local governments
- Applying for and administering grants; and
- To do all acts necessary or convenient to carry out its statutory powers

CICs cannot exercise eminent domain, cannot levy taxes and can only recommend tax abatement and tax incentive programs to entities with authority to initiate the same.^{xix} CICs are subject to audit by the State Auditor’s Office and are subject to the Sunshine Law and Public Records Laws, with limited exceptions. Membership on the CIC board is not a “public office” and CICs can negotiate incentive deals in private.



Economic Development Organizational Benchmarking

Organization Structure	Name	Number of Staff	Board Representation	2019 Income/Revenue
501(c)(6) Community Improvement Corporation/ Land Reutilization Corporation	Knox Area Development Foundation	3	15 Manufacturing, Commercial, City/ County Commissioner/Villages	\$311,701
501(c)(6) Community Improvement Corporation/ Land Reutilization Corporation	Medina County Economic Development Corporation	4	20	\$508,762
501(c)(6) Community Improvement Corporation/ Land Reutilization Corporation	Pickaway Progress Partnership (P3)	2	30	\$1,038,747
501(c)(6) Community Improvement Corporation/ Land Reutilization Corporation	Union County Marysville Economic Development	2	18	\$372,730
501(c)(6) Chamber of Commerce	Union County Chamber of Commerce/ Visitors Bureau	9	19	\$668,960

Source: Internal Revenue Service, Form 990



Area Development Foundation of Knox County. The Area Development Foundation of Knox County (Knox County ADF) is a 501(c)(6) public-private partnership organized in the state of Ohio as a Community Improvement Corporation/Land Reutilization Corporation. Knox County ADF is the economic development agent for Knox County and its municipalities. Knox County ADF has three main objectives: promote and market the advantages of locating business in the County; promote a stronger business environment by facilitating retention and expansion efforts of local employers; and deliver a seamless

network of economic development services and value-added programs to existing businesses, local government, and prospective companies throughout Knox County.



Knox County ADF Program Administration

Program	Mission
County Site & Building Database	Promote available properties for business investment opportunities.
Community Development Block Grant – Economic Development Revolving Loan Fund Program	<p>The Knox County Revolving Loan Fund (“RLF”), a county-wide non-profit financing partner, makes loans from the State of Ohio’s Community Development Block Grant (“CDBG”) to meet the following goals: promote new economic development within Knox County, Ohio; encourage the expansion and stability of the County’s economic base; encourage increased employment opportunities, particularly for low to moderate-income residents; and diversify the County’s economy, so as to not rely on a single industry. Through the RLF, Knox County helps finance all private, for-profit business and industrial concerns located and operating within the County’s geographic boundaries. The RLF also can provide financing to public entities in the County. Projects financed through the RLF should stimulate private capital formation, stabilize and diversify the County’s economy, assist with small business development, encourage the redevelopment of blighted properties, assist businesses owned by minorities, women and the economically disadvantaged, or coordinate with Knox County’s larger economic development efforts.</p> <p>Income Generation: Knox County ADF generates nominal income from CDBG administrative fees as allowable by CDBG program guidelines.</p>
Knox County Tax Abatement Programs	<p>The Knox County ADF acts as the administering entity for multiple tax incentive programs throughout the county.</p> <p>The Ohio Community Reinvestment Area tax abatement program, an economic development tool administered by municipal and county governments that provides real property tax exemptions for property owners who renovate existing or construct new buildings.</p> <p>Knox County is home to five Tax Increment Financing districts throughout the county. A TIF subsidizes companies by diverting a portion of their taxes to help finance development in an area or (less frequently) on a project site. Usually, TIF helps to pay for infrastructure improvements (streets, sewers, parking lots) in the area near new development.</p> <p>Enterprise Zones are designated areas of land in which businesses can receive tax incentives in the form of tax exemptions on eligible new investment. The Enterprise Zone Program can provide tax exemptions for a portion of the value of new real and personal property investment (when that personal property is still taxable) when the investment is made in conjunction with a project that includes job creation. Existing land values and existing building values are not eligible (except as noted within rare circumstances).</p> <p>Income Generation: Knox County ADF generates nominal income from tax incentive monitoring fees.</p>
Knox County Land Bank	<p>Administration of the semi-government entity that strengthens neighborhoods and preserves property values by strategically returning vacant, abandoned, tax-delinquent, and other properties to their most productive uses through a transparent and fair process. The Knox County ADF currently has a \$13million portfolio that includes a former Siemens industrial site, former nursing home, former newspaper building, and vacant lots.</p> <p>Income Generation: Knox County ADF contracts with, and receives funding from, the county to run the land bank.</p>
Knox County Business Advisory Council	<p>To bring employers together to address workforce, working with schools, and promote local career opportunities for Knox County’s K-12 workforce pipeline, the Knox County ADF acts as the coordinator of the county’s Business Advisory Council.</p> <p>This workforce development initiative also addresses housing solutions, childcare needs, nontraditional workforce, and building the manufacturing and healthcare workforce pipeline in the county.</p>

Primary Program Revenue Source	2019 Program Income
Contributions, Gifts, Grants	\$96,071
Economic Development Administration	\$187,500
Other Income	\$14,933
Sublease Rent	\$8,160

Source: Internal Revenue Service, Form 990



Medina County Economic Development Corporation



Medina County Economic Development Corporation, Ohio.

The Medina Economic Development Council is a public-private partnership organized as a 501(c)(6) community improvement corporation and focused on the economic development of Medina County, Ohio. The mission of the Medina County Economic Development Corporation is to “effect the economic footprint of Medina County through advocacy and development of new job opportunities.”^{xx} The Corporation leads the Business Retention & Expansion and Business Attraction efforts

countywide, administers the county’s site and building database to promote business investment opportunities and expansion projects in Medina County, is the administering body for the Medina County Port Authority, and oversees coordination of various workforce development partnerships that supports workforce training, hiring and talent attraction, and developing a pipeline of a future Medina County workforce. The Medina County Economic Development Corporation has a staff of 4, including Executive Director, Economic Developer and Workforce Coordinator, Finance Coordinator, and Executive Coordinator.^{xxi}

Medina County Economic Development Corporation Program Administration^{xxii}

Program	Mission
County Site & Building Database	Promote available properties for business investment opportunities.
Medina County Port Authority	Administering organization of the MCPA, whose mission is to build and sustain a competitive business environment in Medina County by utilizing its unique powers to enhance economic development through marketing and innovative financing.
Medina County Business Advisory Council	The purpose of the Business Advisory Council is to identify skills needed and suggest ways to teach them, advise on the types of jobs available, and create a relationship between business, labor, and education communities.
Medina County Manufacturing Council	To bring manufacturers together to address workforce, working with schools, and promote the brand of manufacturing.

Program Revenue Source	2019 Program Income
Membership Dues	\$265,418
Event/Meeting Income	\$89,735
Port Authority Administration	\$27,932
Enterprise Zone/CRA Admin	\$16,500
Data Contract	\$9,000

Source: Internal Revenue Service, Form 990



PICKAWAY PROGRESS PARTNERSHIP
The Economic Development Agency for Pickaway County and its Municipalities

Pickaway Progress Partnership.

The Pickaway Progress Partnership (P3) is a public-private partnership organized in the state of Ohio as a Community Improvement Corporation. Pickaway Progress Partnership (P3) is the economic development agent for Pickaway County and its municipalities. P3 has three main objectives: promote and market the advantages of locating business in the County; promote a stronger business environment by facilitating retention and expansion efforts of local employers; and deliver a seamless

network of economic development services and value-added programs to existing businesses, local government, and prospective companies throughout Pickaway County.^{xxiii}



P3 is a non-profit corporation with a board of directors comprised of leaders from the public and private sectors. P3 receives its funding from a variety of investors in the public and private sectors. P3 has two staff positions, an Economic Development Director and a Development Assistant. The Economic Development Director is responsible for facilitating and managing discussions among local government officials, developers and stakeholders to construct joint development agreements, advance creative solutions to finance public infrastructure, and develop incentives to attract and retain industry. The Economic Development Director is also charged with marketing and selling the benefits of locating and investing in Pickaway County to targeted companies, developers, site selectors and consultants and working with existing industry to identify federal, state and local government programs that can assist in growing their business in Pickaway County. The Development Assistant provides support to the Economic Development Director, supports with the day-to-day operations of the organization and assists in every aspect and phase of economic and community development projects as needed.^{xxiv}

Pickaway County also established a Port Authority to facilitate economic development activities and the P3 organization acts as an administrator for Port Authority activities.

Pickaway Progress Partnership Program Administration

Program	Mission
County Site & Building Database	Promote available properties for business investment opportunities.
Joint Economic Development Districts	Administering organization of Joint Economic Development Districts in Pickaway County that support intergovernmental cooperation to facilitate economic development activity and public infrastructure investments.

Program Revenue Source	2019 Program Income
Contributions, Gifts, Grants	\$1,038,747

Source: Internal Revenue Service, Form 990

Union County Marysville Economic Development Partnership. Union County operates a unique combination of economic development, chamber of commerce/convention and visitor's bureau under one umbrella as a means to cooperatively manage the economic development and tourism-related activities of Union County. Union County Marysville Economic Development Partnership is organized as a 501(c)(6) community improvement corporation and the Union County Chamber of Commerce is organized as a 501(c)(6) chamber of commerce.



The Union County Marysville Economic Development Partnership, as a Community Improvement Corporation (CIC), serves as the primary point of contact for companies looking to expand or locate a new business to Union County. The goal of the organization is to expand the economy of Union County by working together with our local, regional, and state economic development partners to ensure that the community attracts balanced and sustainable industrial, commercial and residential development. The organization does this by creating a supportive environment that champions economic development, community improvement, and business viability to advance Union County's economy and overall quality of life. Union County Marysville Economic Development Partnership provides general services such as Site Selection Assistance; Gathering Demographic and Economic Data; Pursuing Financial Incentive Packages; Coordination of Meetings with Governmental Agencies; Assistance with Developing the Workforce; and acting as a Liaison with Permitting Efforts.



The Marysville-Union County Port Authority is located under the umbrella of the Union County Marysville Economic Development Partnership and is a statutory agent of Union County created by the Union County Board of Commissioners. The Marysville -Union County Port Authority focuses primarily on the unique ability of port authorities to support real estate development, financing and management of foreign trade zones.

The Union County Chamber of Commerce's purpose is to promote Union County as an attractive travel destination, providing information to leisure travelers, encouraging event organizers to choose Union County for group travel and events, and connecting to local service providers.

Program Revenue Source	2019 Program Income
Union County Marysville Economic Development Partnership	
Membership Dues	\$283,291
Program Service Revenue	\$73,247
Union County Chamber of Commerce	
Lodging Tax	\$267,663
CIC Operations	\$64,308
Reserve Funds	\$63,283
CVB Operational	\$57,150

Source: Internal Revenue Service, Form 990

To enhance economic development services, to catalyze site development and site readiness, and to incentivize private sector development across multiple sectors, Morrow County should create and operate a Port Authority.

Port authorities can be useful economic development tools for local governments. Local governments frequently establish port authorities to promote or support economic development. A port authority is a political and corporate body created pursuant to the authority of section 4582.01-4582.20 of the Ohio Revised Code with an authorized purpose of promoting "activities that enhance, foster, aid, provide, or promote transportation, economic development, housing, recreation, education, governmental operations, cultural, or research within the jurisdiction of the port authority."^{xxv} Ohio Revised Code gives port authorities the power to own land, set fees, and levy taxes. They are usually self-sustaining and often operate railroads, airports, or shipping terminals. Port authorities are frequently established by local governments to promote or support economic development.

Powers of port authorities vary under section 4582 of the Ohio Revised Code which include:

- Acquire real and personal property
- Cooperate broadly with other governmental agencies and exercise powers delegated by such agencies
- Issue revenue bonds for port authority facilities
- Issue voted general obligation bonds for port authority facilities and other permanent improvements
- Levy voted taxes for all purposes of the port authority
- Operate transportation, recreation, governmental, or cultural facilities, and set rates and charges for use of port authority facilities
- Own, lease, sell, and construct improvements to real property
- Receive federal and state grants and loans and other public funds^{xxvi}

A Port Authority differs from a Community Improvement Corporation (CIC) in three distinct ways:

- Port authorities are authorized to levy taxes (sales, property, or special assessment) for up to five years.
- Port authorities can exercise the right of eminent domain to appropriate or condemn property.
- Property owned by port authorities is exempt from all taxes.^{xxvii}



Port Authorities can also issue bonds in two manners:

- As a "pass-through vehicle," based on the credit of the entity for which the bonds are issued.
- By a vote of the local electorate, similar to a local school bond issue.

Port authorities considered important economic development tools for communities because of their tax-exempt status, having the ability to pass savings on to economic development projects, thus making projects possible that might not otherwise happen.^{xxviii} Additionally, they facilitate economic development projects by:

- Acquiring and selling property to economic development projects.
- Loaning monies at competitive rates and terms.
- Providing security for an economic development project by facilitating a structured financing.^{xxix}

Creation and structure of a Port Authority. The State of Ohio authorizes port authorities. A port authority is a political subdivision formed by a local government—county, township, municipality, or combination thereof—under section 4582 of the Ohio Revised Code ("Port Act").^{xxx} Port authorities are governed by a board of directors appointed by elected officials of the local government(s). Except that board members must have a business or place of employment in the local jurisdiction for at least three years, no other criteria is required by law in choosing board members.^{xxxi} Port authority boards vary widely in size and board composition. The board adopts bylaws providing for the administration and governance of the port authority.^{xxxii} The local government creating the port authority appoints members of the board and fills subsequent vacancies. Directors serve staggered four-year terms with a majority of directors constituting a quorum.^{xxxiii} The port authority is a political subdivision of the local government and, as such, is subject to state audit and to the Sunshine Law which requires that the port authority holds public meetings and makes records available for public inspection.^{xxxiv} The local government forming the port authority is responsible for oversight. The powers and duties of each port authority are spelled out in the local government's ordinance or resolution forming the port authority.^{xxxv} The local government does not have to delegate all of the powers allowed, but certain powers are authorized under 4582 of the Ohio Revised Code.

Successful economic development organizations strive for a collaborative representation of industry, government, and community stakeholders. When structured and managed well, economic development organizations can affect transformational change for communities and residents and have broad impact on the services the organization offers to existing businesses, new businesses, and businesses of all sizes.

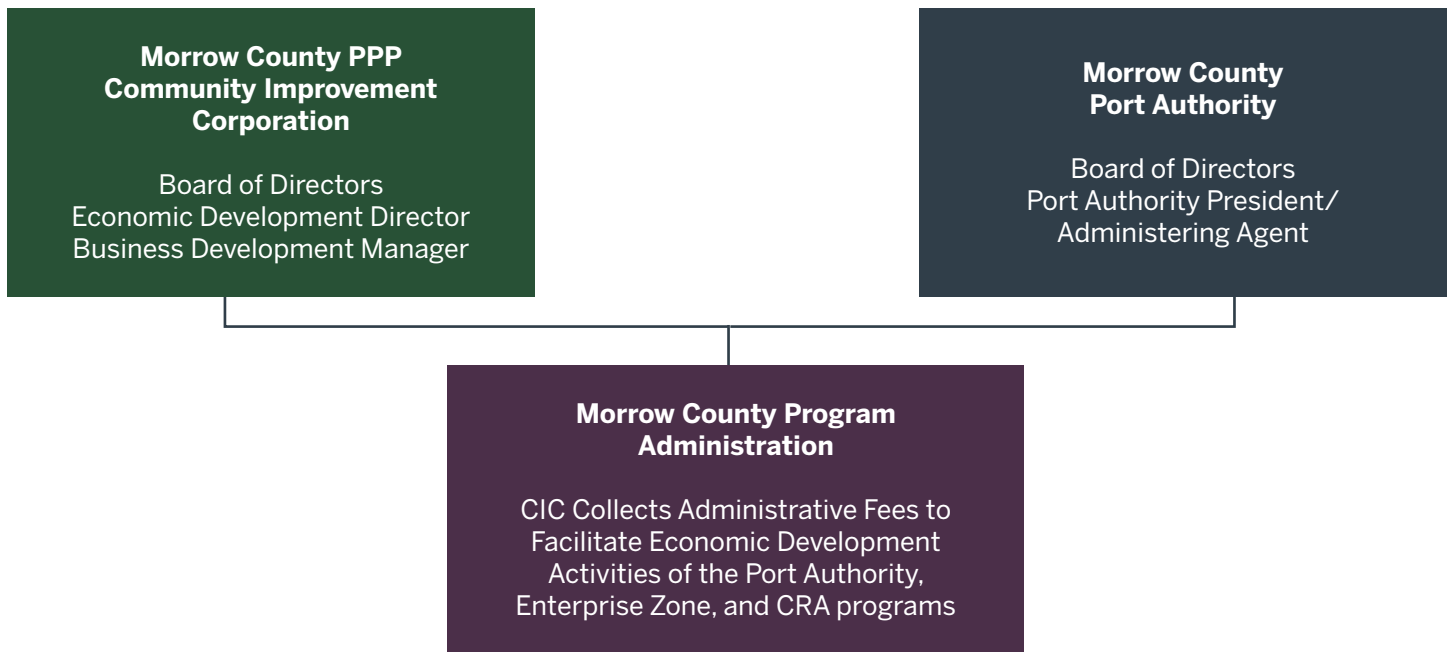
Morrow County should hire P3 staff to include at a minimum an Economic Development Director and Business Development Manager to deliver strategic countywide economic development priorities.

The mission of the new Public-Private Partnership should be structured as a 501(c)(6) Community Improvement Corporation/Land Reutilization Corporation with the focus on a broad range of activities to attract, create, and retain jobs, and to foster a resilient, pro-growth tax base and a diverse economy. Morrow County should establish a Public-Private Partnership through a 501(c)(6) community improvement corporation through a similar model as Medina County Economic Development Corporation where economic development and port authority agencies can work in tandem to promote business development, new business attraction, and site development that enhances the strength of Morrow County businesses across all industry sectors and prepares sites for new development opportunities.

Currently, Morrow County economic development is supported by one staff member employed by the county. To effectively operate a countywide economic development organization and capitalize on the robust regional economic development activity, Morrow County should hire two economic development staff members under the community improvement corporation to represent the Public-Private Partnership team. Additionally, Morrow County should consider hiring a president for the port authority or appointing the Public-Private Partnership as the administering agent of the Morrow County Port Authority.



Morrow County Public-Private Partnership Economic Development Model



Morrow County Economic Development Action Plan Tactic #2 – Morrow County’s PPP should develop economic development priorities that support existing business needs, builds a strong network of Morrow County business leaders, and encourages investments that creates high-value jobs and enhances the wealth of Morrow County and its residents.

Three fundamental tools that Economic Development Organizations (EDOs) can employ to make the best use of this funding: a strategy, including steady streams of funding and flagship programs and initiatives; the right organizational design to reinforce this strategy; and rigorous performance management to monitor the strategy and design. Across regions, EDOs have endless lists of potential priorities and diverse stakeholders with similarly diverse and distinct priorities. Without a clear mission, EDOs could be pulled in different directions or end up overextending resources across sectors and stakeholders, resulting in under-resourced initiatives that have limited impact. For this reason, the Public-Private Partnership will want to be purposeful in what its focus areas are and what it wants to accomplish. Being clear-eyed about where the organization can affect the most change and building a strategy around those priorities allows EDOs to focus resources and energy on their core mission.

Morrow County Economic Development should design and implement a comprehensive Business Retention & Expansion (BR&E) program to inventory key employers in Morrow County, identify business growth opportunities, understand business constraints, and support business retention, expansion, and workforce opportunities that enhance Morrow County’s economic base.

There are several compelling reasons why economic and workforce development organizations should make Business Retention & Expansion (BR&E) a priority. It is a well-known fact, backed by industry data, that 80% of all new jobs and capital investment come from existing companies.^{xxxvi} In economic development we spend much of our time trying to attract new businesses to our community. There is a pay-off to those attraction efforts, but more often than not, a good Business Retention & Expansion program (BR&E) can pay even greater dividends than an attraction program. Benefits to a robust BR&E program include:

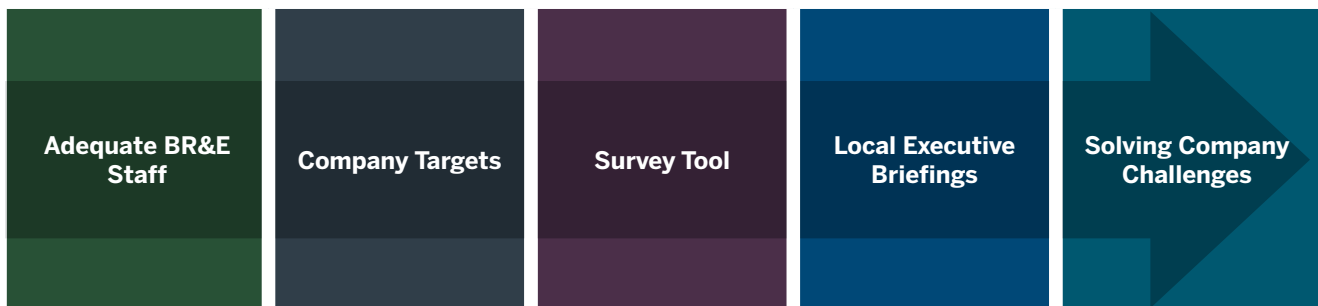


- An effective BR&E program creates ongoing interaction with an EDO's primary customers – business leaders and decision makers.
- Existing companies, large and small, are the backbone of a local economy. Success of these companies creates a vibrant business environment where other companies want to locate.
- A vibrant business environment signals to new business startups that they too will have resources available to start and grow a new business.
- An effective BR&E program brings to light economic and workforce trends that an EDO and community should pay attention to.
- It is significantly more cost effective to work with existing businesses than continually cultivate new companies.

A well-planned and strategic approach to BR&E activities will assist Morrow County with addressing competitiveness needs and expansion by:

- Partnering with local and regional stakeholders to develop an annual list of targeted companies based on defined company factors including a largest employers list, companies experiencing market growth, hiring trends, and state or regional industry sector and strategic cluster targeting.
- Coordinating with local government representatives, state or regional partners, and workforce development partners to plan visits and develop outcomes for existing industries to succeed.
- Meeting with local company executives to gather input on the issues they face and addressing their issues to help these companies grow in the region.
- Facilitate conversations with decision makers to aid a company's issues related to access to capital, addressing regulatory issues, better transportation access, and other business and policy issues.
- Adequately funding operations, through investment by private and public sector economic development partners, annually to provide proper funding of a BR&E program to ensure that proper staffing and promotion is available.
- Investing in BR&E software and surveys to gather and track data and trends from local companies.

Morrow County Business Retention & Expansion Program Approach



- 1. Adequate BR&E Staff:** Economic development organizations must dedicate public and private resources to an ongoing BR&E campaign. The job of assisting existing industry is a daily task that must be coordinated across multiple organizations in a community. Without dedicated BR&E staff, issues that businesses face do not get addressed and opportunities for investment may be missed.
- 2. Company Targets:** No matter how big or small, a community needs to develop its list of targeted companies that it wants to visit on an annual basis. This list can change from year-to-year but should remain relatively constant to track the trends of these companies and these sectors. Economic development staff should build relationships with these companies to give them comfort in reaching out when an issue arises. BR&E target companies are companies that:
 - i. Match community assets or competitive advantages.
 - ii. Match the community's development goals.
 - iii. Could operate from another community altogether (relocation is easy).
 - iv. Export products or services from the community.
 - v. Have potential to expand or diversify local economy.
 - vi. Are identified within a strategic plan's SWOT analysis.



- 3. Survey Tool and Tracking Software:** A community should develop a common survey tool that its staff, partners, stakeholders, and local representatives can use when visiting companies. These individuals should be trained in how to use the tool and what keywords to pay attention to in order to gather the necessary information at each visit. The common survey tool can be used to gather data about each company, about industry sectors, and about local trends. Public policy and EDO programming can often be formulated based on the common survey. The survey data should be inputted into BR&E or CRM software. This allows for reliability and consistency of information as well as checking the trends and needs of companies. JobsOhio and the JobsOhio Network Partner, OneColumbus, may have this CRM software available for Morrow County to use to track BR&E activity.
- 4. Local Executive Briefings:** A BR&E program is only as good as the information gathered in briefings with company executives and the strategies developed or maintained to support existing companies. Once companies are targeted a calendar should be developed for the visits, schedules should be coordinated with local representatives, partners and stakeholders, and visits should be scheduled. A BR&E visit training should be held before the visit, even for BR&E veterans. The visits should seek out the information in the common survey tool, but not follow a script as these visits should be a conversation.
- 5. Solving Company Challenges:** Be it regulatory, incentives, workforce or utilities, companies face challenges that economic development professionals, elected officials, and their partners can address. The local executive briefings should be followed by calls, emails, and other communication to ensure that challenges identified in those meetings are addressed and fixed. The biggest downfall of any BR&E program is a lack of follow through leaving companies having to address their challenges on their own.

BR&E Stakeholder Roles & Responsibilities

BR&E Role	EDO	Local Gov't	County Gov't	Chambers	Utilities	Educational Partners	Individual Business Leaders	Other Organizations
Manage the program	X							
Serve as advisor to program	X	X	X	X	X		X	X
Financial support for program	X	X	X		X			
Collect data	X	X	X	X	X			X
Evaluate data	X							
Provide technical assistance	X	X	X		X	X	X	X
Promote program	X	X	X	X	X	X	X	X
Advocate for program	X	X	X	X	X	X	X	X

A community's economic health is dependent on the number and quality of jobs provided by employers in the community. Good jobs keep residents living in rural communities, support the local tax base, and reinvest disposable income back into the local communities. Today, forward thinking community leaders all across the United States should embrace a strong Business Retention & Expansion (BR&E) strategy. A successful BR&E program provides community leaders with advanced warning about problems that may lead to business or plant closures which can lead to proactive intervention and creative solutions to retain employers in the community. BR&E also encourages community leaders to identify new opportunities for businesses in the community and support them in expanding and creating new jobs.



Business Retention and Expansion Questionnaire Template

Collecting current data is an important tool in working to support the growth of existing business and industry in a community. Economic Development Organizations are encouraged to share appropriate data trends collected from BR&E visits with local boards and stakeholders.

Instructions:

For each of the indicators below, please rate the company based on the information provided in the survey.

0 = Indicator does not apply to this company

1 = Indicator applies somewhat to this company

2 = Indicator applies to this company

Type of Indicator:

Growth = "3 or higher" is a positive indicator suggesting that company may be expanding and/or adding jobs. "1" indicates decline.

Risk = "3 or higher" indicates that company requires follow-up to ensure that the indicator is not causing the company to close or leave community.

Stable = "3 or higher" indicates that company is stable but not necessarily in a position to grow. "1" indicates instability.

Decline = "3 or higher" is a negative indicator suggesting that the company may have to close or move its plant in the near future. "1" is positive indicating stability and growth potential that should be monitored.

Company Name:		Phone:	
Address:		Email:	
City:		Website:	
State:		Contact:	
ZIP		NAICS:	
Company Data			
Year			
Date of Interview			
	Indicator	Indicator Value	Type of Indicator
1	Company has acquired another company		Growth
2	Major equipment purchases at facility within last 12 months		Growth
3	Equipment purchases or facility expansion planned in the next 12-36 months		Growth
4	Annual budget for capital investment is growing		Growth
5	Company meeting/exceeding annual sales projections		Growth
6	Company has introduced a new product or service within past 6 months		Growth
7	Total full-time employment is increasing		Growth
8	Company has workforce training needs (new hires, employee retention)		Growth/Stable
9	Company has room to grow and expand at existing location		Growth /Stable
10	Company has large and diverse customer base		Growth /Stable
11	Company operates an e-commerce website and has robust online presence		Stable
12	Company has stable relationships with its suppliers		Stable
13	Have suppliers or customers recently relocated further away from company? If applicable.		Stable/Decline
14	What is annual turnover rate and is this an issue?		Stable/Decline
15	Company is looking to end production of product		Decline
16	Employment reductions expected in next 6-12 months?		Decline



BR&E Customer Relationship Management (CRM) Systems – Economic Development

ExecutivePulse (<https://www.executivepulse.com/>) – ExecutivePulse is a Customer Relationship Management (CRM) solution built by economic developers for the economic development profession. ExecutivePulse promotes their intuitive design that allows users to easily create at-a-glance reports and presentations, optimize an EDO's internal and external communication, and track the progress of an EDO's initiatives. ExecutivePulse can be optimized around an EDO's priorities and initiatives to include:

- Business recruitment/FDI
- Business Retention & Expansion
- Entrepreneurial development
- Event management
- Government front desk programs
- Investor relations management
- Project management
- Sector or cluster-based initiatives
- Sites and buildings
- Supply chain initiatives
- Workforce development

Salesforce (www.salesforce.com) – Salesforce is a CRM system that can be designed for a wide variety of public and private sector organizations. Salesforce “unites” marketing, sales, commerce, service, and IT teams with its Customer 360 integrated platform to connect an entire suite of Salesforce-specific apps. Salesforce is the current CRM platform used by JobsOhio and the JobsOhio Networks.

Conrin (www.conrin.com) – Conrin customizes the Salesforce CRM platform specific to economic development organizations. Conrin has implemented Salesforce.com for economic development since 2003 for clients in twenty-seven states and provinces. Its industry knowledge allows Conrin to guide customization of Salesforce while simultaneously sharing best practices based on its extensive industry experience. Conrin understands the importance of an EDO's priority metrics such as:

- Company and Contact Management
- Projects
- Incentives
- Business Expansion & Retention
- Workforce Development
- Investor Management

With over a decade of implementing Salesforce.com for economic developers, Conrin understands the industry and best practices necessary to support its clients. Conrin does more than standard implementations. Ongoing training, feature updates, Salesforce “reboots,” and custom support packages are offered to clients to demonstrate ways to implement multiple CRM solutions, which allows an EDO to select the correct “fit” for its organization.

Cloud Nine – Economic Development (<http://economicdevelopmentcrm.com/>) – Cloud Nine uses the Microsoft Dynamics 365 platform to provide economic development CRM services. Cloud Nine works with ED professionals at every level – local, county, regional, or state – in development agencies, chambers of commerce, tourism, energy, and other organizations responsible for economic development activities. Using the Microsoft Dynamics 365 platform, Cloud Nine – Economic Development is an organization's answer to issues that ED teams tackle every day, building an intuitive and comprehensive system for EDOs including managing:

- Economic development projects
- Incentives
- Grants
- Compliance
- Sites & Buildings
- Leases
- Investors
- Case management
- BR&E surveys



Morrow County Economic Development should develop an economic development incentives policy to guide local incentives considerations given to business expansion and business attraction investment projects that create meaningful investment and high-value jobs in the community.

The state of Ohio has several tax incentives available to communities to encourage economic growth, retain and create jobs, encourage private sector capital investment, and increase a community's tax base. The laws and rules for these economic development incentives are spelled out in the Ohio Revised Code, but their use is at the direction and approval of local entities such as counties, municipalities, and townships. Tax incentives have been used as a policy tool for local communities looking to spur economic development and attract and retain quality jobs. While tax incentives can influence economic growth and opportunity in communities, intentionally administering incentives that support targeted industry sectors, the creation of high-value jobs, and supporting business behaviors supportive of the local community are important.

Morrow County has numerous economic development tools in its toolbox to successfully compete for new business investments and should develop an incentives policy to attract targeted business sectors and high-wage jobs. To effectively attract new business investments, Morrow County should offer 100 percent, 15-year tax abatement incentives and secure upfront school donation agreements (PILOTs) with local school districts. This defined incentives structure provides consistency and clarity with regard to local incentives and demonstrates the county's efficient negotiating process with business prospects.

Ohio Economic Development Program Terms and Definitions

Community Reinvestment Area (CRA). The CRA program allows counties and municipalities to designate areas of its community for real property tax abatement for the remodeling of existing structures and the construction of new structures. The program is regulated by the Ohio Revised Code, sections 3735.65 to 3735.70. The tax abatement provided under the CRA program exempts from taxation the assessed value of a new structure or the increase in assessed value of a structure that has been remodeled. The program does not provide an exemption from taxation of the increase in the value of the land underneath the new structure or remodeled structure, nor does it allow for the exemption from taxation of existing taxes on the tax duplicate. The CRA program allows for an exemption of up to one hundred percent (100%) of real property taxes for a period not to exceed fifteen (15) years. The county or municipality offering the CRA tax abatement must seek the approval of the board of education to offer the tax abatement for an exemption greater than fifty percent (50%). The CRA tax abatement can be offered to commercial and industrial remodeling with a minimum \$5,000 investment for up to twelve (12) years, up to fifteen (15) years for commercial and industrial new structures, up to ten (10) years for residential properties with less than two units with at least a \$2,500 investment, up to twelve (12) years for residential remodeling of more than two (2) units with at least a \$5,000 investment, and up to fifteen (15) years for residential new construction.

Enterprise Zone (EZ). The EZ program allows counties, municipalities, and townships to designate an area of its community for real property tax abatement for businesses that are looking to renovate existing commercial and industrial structures or construct new commercial or industrial structures. Retail projects are not eligible for tax exemption under the EZ program unless they are located in an impacted city. Residential projects are also not eligible for a tax exemption under the EZ program. The program is regulated by the Ohio Revised Code sections 5709.61 to 5709.69. The tax abatement provided under the EZ program exempts from taxation the assessed value of a new structure or the increase in assessed value of a structure that has been remodeled, and the assessed value of the land underneath the new structure or remodeled structure. The



EZ program allows for an exemption of seventy-five percent (75%) of real property taxes for a municipality, and an exemption of sixty-percent (60%) for a county for a period not to exceed fifteen (15) years. The county, municipality or township offering the EZ tax abatement may offer tax abatement up to one hundred percent (100%) with the approval of the impacted school district. If the EZ tax abatement is being offered to a company that, as a result of the project, is relocating jobs from one Ohio location to the new location, the community must seek a waiver from the Ohio Department of Development (ODOD) for the tax abatement.

Tax Increment Financing District (TIF). The TIF programs allows counties, municipalities, and townships to use real property taxes created from the increase in the assessed value of land, new structures, and remodeled structures to pay for the provision of public improvements. Public infrastructure improvement includes, but is not limited to, public roads and highways; water and sewer lines; the continued maintenance of those public roads and highways and water and sewer lines; environmental remediation; land acquisition, including acquisition in aid of industry, commerce, distribution, or research; demolition, including demolition on private property when determined to be necessary for economic development purposes; stormwater and flood remediation projects, including such projects on private property when determined to be necessary for public health, safety, and welfare; the provision of gas, electric, and communications service facilities, including the provision of gas or electric service facilities owned by nongovernmental entities when such improvements are determined to be necessary for economic development purposes; and the enhancement of public waterways through improvements that allow for greater public access. Counties, municipalities, and townships may establish a TIF district for a period not to exceed ten (10) years and for exemption of not more than seventy-five percent (75%). The TIF district may be established for up to thirty (30) years and for an exemption of one hundred percent (100%) with the approval of the impacted school district.

Tax Incentive Benchmarking

Morrow County has used incentives programs like Community Reinvestment Area (CRA) and Tax Increment Finance (TIF) programs to incentivize job creation, job retention, payroll growth, growth of the local tax base, new capital investment, and public infrastructure improvements that foster growth. Morrow County sits in central Ohio, however, is in close proximity to the north-central Ohio region that has a strong manufacturing base and competes with its neighboring counties in the region for capital investment, new jobs, and new payroll. Due to the presence of Interstate 71, Morrow County has attracted and continues to attract companies in the transportation and distribution sector and manufacturing sector. The county's use of tax incentives has played a part in ensuring that these companies locate in Morrow County and not in neighboring counties. While competitive with its neighbors, communities throughout central Ohio use different approaches for tax abatement to make them competitive and compensate school districts and townships for some abated property tax revenue.



Tax Abatement Benchmarking Overview					
Community	Type	Rate	Term	PILOTs	Companies
Morrow County	CRA, EZ, and TIF	50%-75% CRA & EZ 75%-100% TIF	10-15 years 10-30 years	TIF agreement policy under consideration	Dollar Tree, H&M, LSI, American Lumber, Alum Creek
Medina County	CRA and EZ, post-94 and pre-94	50%-100%	10-15 years	Income tax sharing with schools; 50% of all new income tax for abatements over 50%	Isomer, Atlantic Tool & Die, Blair Rubber Companies, MTD Group
Pickaway County, Rickenbacker	CRA, post-94	100%	15 years	School PILOT payment based on \$28/PSF building value 30% of non-tax abatement value to school; JEDD income tax pays for infrastructure	NorthPoint Development, Duke Realty, BASF, Goodyear, Amazon, Hyperlogistics
Licking County, Etna Township	CRA, post-94	100%	15 years	Income tax sharing with schools; 50% of all new income tax generated through JEDD	Kohl's Distribution, ProLogis Development, Amazon, Coty, Inc.
Delaware County	CRA, post-94, TIF	50%	15 years	Income tax sharing with schools; 50% of all new income tax in JEDD; 50% CRA in years 1-10, TIF for remaining 20 years	Mixed-use development, Ohio Health, OSU Medical Center, Evans Farms, Kerbler Farms
Butler County, West Chester Township	Enterprise Zone	55%-75%	6-10 years	Tax abatements secured without school board approval	Amylin, Republic Wire, DRT Medical
Butler/Warren County, Monroe	CRA, post-94 and pre-94	100%	10 years	Income tax sharing with schools, schools receive 50% of all new income tax	Kohl's Distribution, Home Depot, Presto Foods, Cornerstone Brands, Hayneedle, Blue Buffalo, Amazon
New Albany	CRA, post-94	100%	15 years	Income tax sharing: 30% to infrastructure; 26% to Columbus; 22% to Licking Heights Schools; 22% to New Albany	Google, VanTrust Development, Facebook, Amazon, Accel, Inc.
Whitehall	CRA, post-94	100%	15 years	Income tax sharing agreement with schools; 33% of new income tax	Heartland Bank, Wasserstrom, Rite Rug
Groveport	CRA, post-94 and pre-94	100%	15 years	Income tax sharing agreement with schools – 50% of new income tax	AEP, Gap, Wal-Mart Distribution, Opus Distribution, VanTrust Development

In Central Ohio, the City of New Albany has led the way in attracting new capital investment and jobs using tax incentives. Since 1998, New Albany has attracted more than \$3 billion in private investment resulting in more than 11 million square feet of development, 15,000 jobs and more than \$100 million in income tax revenue according to the City's own study. New Albany has done this by utilizing a CRA that provides a 100%, 15-year tax abatement benefit to the companies that locate and expand in New Albany with income tax sharing to the schools, and to Columbus for infrastructure reimbursement.

The Rickenbacker area which contains the communities of Obetz, Columbus, Groveport in Franklin County and Harrison and Madison Townships in northern Pickaway County has attracted more than \$500 million in capital investment since 2006 and supports 15,280 jobs and over \$880 million annually in payroll.^{xxxvii} Many of the communities in the Rickenbacker area provide a 100%, 15-year pre-1994 CRA tax abatement or a 100%, 15-year post-1994 CRA tax abatement. The communities provide compensation to the school districts in the area through income tax sharing or through a Payment in Lieu of Taxes (PILOT).



Morrow County Economic Development Corporation should establish and coordinate a C-level executive roundtable initiative that brings together local business leaders to benchmark and share ideas.

An effective leader understands that building a network is important but maintaining and nurturing that professional network is also important. Business leaders in C-suite positions typically have built strong networks within industry sectors and local communities throughout their career. A well-developed professional network is filled with individuals who are highly skilled in diverse areas of expertise and can be called on to lend perspective and share experiences that help leaders maneuver through various complexities. Through the “listening” phase of the Economic Development Strategic Plan process, it became evident from local business leaders there is an appetite to have more meaningful interactions together. The Morrow County economic development team can play an integral role in establishing and facilitating these interactions which ultimately creates a healthier business community that is apt to foster innovation and creative investment opportunities in the community, as well as advocate for new business attraction opportunities within Morrow County.



The Edward Lowe Foundation has developed a unique CEO roundtable methodology, PeerSpectives, that is designed specifically for leaders of second-stage growth companies.^{xxxviii} The Edward Lowe Foundation defines a second-stage growth company as one that has moved beyond the start-up phase but has not yet reached full maturity. Typical C-level roundtable formats are structured to ensure there is balanced representation from the local business community. Conversations are usually structured, and an emphasis is placed on sharing experiences

rather than offering advice.^{xxxix} The Foundation's approach to PeerSpectives varies in that it provides a confidential environment for discussing sensitive business and even personal issues with colleagues.^{xl} Participants have reported they have gained new ideas on everything from marketing strategy and financial issues to dealing with difficult personnel problems.^{xli} PeerSpectives roundtables were originally designed for CEOs, presidents and owners of second-stage companies. Over the years, the Foundation found the system works for any professional in a position of leadership and who possesses final decision-making authority, such as leaders of nonprofit organizations, department heads of municipalities and business owners of first-stage companies. In short, it benefits any leader who encounters decisions they have never faced before.^{xlii}

The Edward Lowe Foundation's PeerSpectives program is a proven format being utilized by communities and organizations across 18 states, Canada, and throughout the United States by the National Association of Women Business Owners.^{xliii} Comprehensive executive leadership development and networking programs such as Aileron Professional Management, located in Tipp City, Ohio, provide robust C-suite services that range from professional development and leadership development based on the Edward Lowe Foundation's “economic gardening” philosophy of growing a company by primarily focusing on the business, not in it.^{xliv}

The Greater Akron Chamber in Akron, Ohio is a more simplistic approach to the C-level executive roundtable structure. The Greater Akron Chamber also uses the PeerSpectives protocol and make all the difference for business leaders.^{xlv} The Chamber's focus is hosting regular roundtables where executive attendance improves leadership skills, sharpens decision-making abilities and builds lasting relationships with peers.^{xlvi} Roundtables include 8-12 participants from noncompeting industries and provide a confidential environment to share challenges and learn from the experience of others.^{xlvii}

The appetite from existing business owners and C-suite executives to have a forum to discuss industry trends, operational approaches, and build lasting relationships in the community is evident and the benefits to the business community that evolve out of these roundtable relationship-building forums should not be ignored.



A consistent funding stream is essential for continuous success and a critical part of a well-rounded strategy. But many EDOs struggle to secure stable funding—in part because most funding for EDOs comes from the public sector and is tied to the annual budget process. It is not uncommon for legislators to call to reduce EDO funding or to completely defund specific projects or initiatives. This disruption can hamper the effect of EDOs and their programs and makes longer-term investments and flagship projects difficult to pursue and see to completion.

The right organizational design is a critical factor in reinforcing the strategy because it will help EDO leaders clearly define and deprioritize economic areas that are not relevant to an EDO's mission. By being deliberate in the design process, EDO leaders can further hone the organization's efforts and align stakeholders while making the best use of their resources. EDOs can organize themselves by sector, by region, or around enablers such as regional talent.

An organization designed around sectors can be a good fit for EDOs focused on job creation because it can help them to focus their resources, set targets by sector, and build the right expertise.

To expand upon the marketing of tourism assets, Morrow County should consider the current lodging tax structure and opportunities to increase the lodging tax as allowed by state law and reinvest those lodging tax revenues into marketing efforts.

The Morrow County Commissioners recently commissioned an economic impact analysis, completed by Tourism Economics, an Oxford Economics Company which is one of the world's foremost independent global advisory firms. The goal of the report is to combine an understanding of the travel sector with proven economic tools. The report notes that the travel sector is an integral part of Ohio's economy, in 2021 tourism-supported jobs accounted for more than 7.3% of all jobs in the state. Visitors generate significant economic benefit to households, businesses, and government. Results of this study show the scope of the visitor economy in terms of direct visitor spending, along with total economic impacts, jobs, and fiscal impacts in the broader economy. The IMPLAN input-output (I-O) model was constructed for the State of Ohio, and it traces the flow of visitor-related expenditures through Ohio's economy and their effects on employment, wages, and taxes. Data was cross checked with employment and wage data for each sector. Visitors were classified as those who stayed in overnight accommodations or those who came from a distance greater than 50 miles and deviated from their normal routine.

2021 was year of rebound and visitor levels nearly recovered to pre-pandemic levels. Visitor spending in Morrow County amounted to \$30.1 million, which generated a tourism total economic impact of \$54.6 million and 676 jobs with associated labor income of \$16.5 million (2021). Industries with high total business sales included retail trade, food/beverage, recreation/entertainment, FIRE (finance, insurance, real estate sectors), and other transport. This tourism generated \$7.2 million in total tax revenues, which amounted to \$3.5 million in state and local tax revenues, \$1.5 million in local revenues, and \$270 per household in tax burden relief.

Morrow County's direct sales growth with sales volume showed an increase of 18.3% from 2020-21, while Central Ohio grew 23.9% and Ohio grew 21.6% during this same time period. The 676 jobs supported by visitor spending accounts for 6.4% of all jobs in the county, with the majority of jobs in the food and beverage industry, retail trade, other transportation, and recreation/entertainment industries. Visitor activity generated \$16.5 million including direct labor, indirect labor, and induced labor income. Retail trade was highest with \$3.9 million followed by other transport (\$3.0 million), food and beverage (\$2.5 million), and business services (\$1.6 million).

By region, the central Ohio region (Columbus area) is second in the state in Ohio tourism business sales (second to the northeast region, Cleveland). Cleveland, Columbus, and Cincinnati are key destinations and influence the distribution of tourism economy across Ohio.



The Central Ohio region visitor spending generated \$14.5 billion in total sales, 102,426 jobs, \$3.7 billion in income and \$2.0 billion in tax revenue. Of the 11 Central Ohio region counties, Morrow County generated visitor spending sales of \$54.6 million, supporting 676 total jobs and \$16.5 million in total income, and collected \$7.2 million in total tax revenue.

Ohio visitors are supporting businesses in transportation, food and beverage, retail shopping, recreation, and lodging. There were 219 million visitors to Ohio in 2021 with a direct visitor spending impact of \$35.1 billion, generating a total economic impact of \$60.5 billion. This included both domestic and international visitors. The total economic impact sustained 497,000 jobs and generated \$4.1 billion in state and local tax revenue in 2021.

The Ohio Revised Code permits local governments to levy a tax on lodging furnished to transient guests by hotels and motels within that local jurisdiction. Municipalities or townships may levy a lodging tax of up to 3.0 percent, plus an additional tax of up to 3.0 percent if they are not located (wholly or partly) in a county that has not levied a lodging tax. Counties may levy a lodging tax of up to 3.0 percent but may not levy such a tax in any municipality or township that has already levied the additional lodging tax. The maximum combined tax rate permitted in most locations is 6.00 percent.^{xlviii} For most municipalities and townships, revenue from the lodging tax goes to the general revenue fund. However, for municipalities or townships that levy the additional tax of up to 3.0 percent, at least 50 percent of the revenues from the additional tax are allocated to the convention and visitor's bureau operating within the county and the remainder goes to the municipal or township general fund. To those municipalities and townships within the county that do not levy a lodging tax, counties are required to return a uniform percentage (not to exceed 33 1/3 percent) of the revenue from the county lodging tax generated within such municipalities or townships. The remainder of the revenue is deposited in a separate fund to be used for county convention and visitors' bureau expenses.^{xlix}

Currently, Morrow County has a 3 percent lodging tax that collected \$10,562 in 2020, according to the Ohio Department of Taxation. Additionally, Chester, Franklin, and North Bloomfield townships also collected a 3 percent lodging tax that generated \$19,371 among the three jurisdictions for a total lodging tax collection throughout Morrow County of \$29,933.

2020 Collections, Morrow County				
County	Local Government Jurisdiction	By Subdivision	Total Within County	Tax Rate
Morrow	Morrow County	\$10,562	\$29,933	3.00%
Morrow	Chester Twp.	\$13,730		3.00%
Morrow	Franklin Twp.	\$2,840		3.00%
Morrow	North Bloomfield Twp.	\$2,800		3.00%

Source: Ohio Department of Taxation

With 18.3 percent growth between 2020-2021 in the height of the COVID 19 pandemic, Morrow County has benefitted from a growing tourism sector and should capitalize on this growth by increasing current lodging tax rates especially in Chester Township. When examining peer communities that have major highways and interstates traversing the county and have similar lodging operations, there is a range of lodging tax rates generating revenues for the county convention and visitor's bureau efforts which demonstrates an opportunity for Morrow County jurisdictions to generate additional lodging tax collections that can support an enhanced marketing campaign to promote future tourism sector growth.





Madison County, Ohio. Madison County has two similar lodging businesses along a major interstate in the county. Lodging in Madison County is located along Interstate 70 in Deercreek Township, with a Holiday Inn Express and Fair Bridge Inn Express which generates \$59,587 in lodging tax to the township. The county and three municipalities all levy a 3 percent lodging tax. Deercreek Township levies a 6 percent lodging tax and generates the largest share of the county's overall lodging tax collections. Total collections in Madison County in 2020 equaled \$81,681.

Madison County's primary marketing arm is the Madison County Chamber of Commerce. The county is located in central Ohio and is home to the city of London, along with five villages, fourteen townships, and many other communities such as Lake Choctaw. The Madison County area is bestowed with vast farmlands, and agriculture is a predominant livelihood for many.

Madison County is home to eleven nationally registered historic places, many parks and recreational outdoor areas, fantastic small-town eateries, boutique shopping and more. The Madison County Chamber of Commerce is dedicated to improving the communities and businesses it serves, while honoring the county's unique agricultural heritage. The chamber was founded in 1959 with the mission to enhance the economic, civic, and cultural growth of Madison County, and to act as a "voice of the community."

Madison County, Ohio Lodging Tax

2020 Collections, Madison County				
County	Local Government Jurisdiction	By Subdivision	Total Within County	Tax Rate
Madison	Madison County	\$21,892	\$81,681	3.00%
Madison	Plain City, Village	\$-		3.00%
Madison	Deercreek Twp.	\$59,587		6.00%
Madison	Pleasant Twp.	\$-		3.00%
Madison	Range Twp.	\$202		3.00%

Source: Ohio Department of Taxation



Wyandot County, Ohio. Wyandot County has two similar lodging businesses along a major U.S. route in the county. Lodging in Wyandot County is located along U.S. Route 23 in Upper Sandusky, with a Quality Inn and Royalton Inn & Suites which generates \$48,391 in lodging tax to the county. The county levies a 6 percent lodging tax and two municipalities levy a 3 percent lodging tax, although the county was the only collecting jurisdiction in 2020. Total collections in Wyandot County in 2020 equaled \$48,391.

Wyandot County's primary marketing arm is the Wyandot County Chamber of Commerce. The Chamber represents the Wyandot County business community and its mission is to support the growth of its community, businesses, and the profitability of its members. The Wyandot Chamber of Commerce has three major objectives: workforce, member services to support the robust success of its members, and programs that support community economic development. The chamber has a "What's Up Wyandot County" podcast, maintains a countywide calendar of events, is the county's Safety Council administrator, and is a partner in the county's Employment Task Force with the county economic development office.^{li}



Wyandot County, Ohio Lodging Tax

2020 Collections, Wyandot County

County	Local Government Jurisdiction	By Subdivision	Total Within County	Tax Rate
Wyandot	Upper Sandusky	\$48,391	\$ 48,391	6.00%
Wyandot	Carey	\$-		3.00%
Wyandot	Crawford	\$-		3.00%

Source: Ohio Department of Taxation

Morrow County is home to attractive and unique destination assets that draw visitors and residents to explore the county's natural beauty and unique experiences. Developing a strong brand that consumers can relate to with emotion and excitement will continue to enhance unique visits and spending in Morrow County. Whether your brand attracts visitors for the state park, racing, events or sightseeing, there's one thing that drives Morrow County visits—adventure. Brand companies such as northeast Ohio's thunder::tech understands that conveying the true story, inspiration and feeling of an experience is the best way to push your audience past scrolling Instagram and on to reserving tickets. An agency with the right experience knows where to be seen online with digital, how to come to life in the physical space with experiential and how to track the data to make your next move even more effective.ⁱⁱⁱ



One of the most notable tourism branding agencies in the state of Ohio is the **Lake Erie Shores & Islands** visitor's bureau, which is a partnership effort between Erie and Ottawa counties. Lake Erie Shores & Islands has created a destination journey in their promotional materials and online presence to encourage potential

visitors to build their vacation online through experience. According to the Shores & Islands website, "Shores & Islands Ohio is not just a place...it's a feeling. It's the memories people have from unforgettable experiences here that live in their hearts for a lifetime...boundless adventures and discoveries await...it's where you find your Lake Erie Love."ⁱⁱⁱⁱ Morrow County should utilize similar marketing efforts that allow visitors to create their adventure in the county, drawing together the diverse tourism attraction assets the county has that makes it different than other Ohio and Midwest destinations.

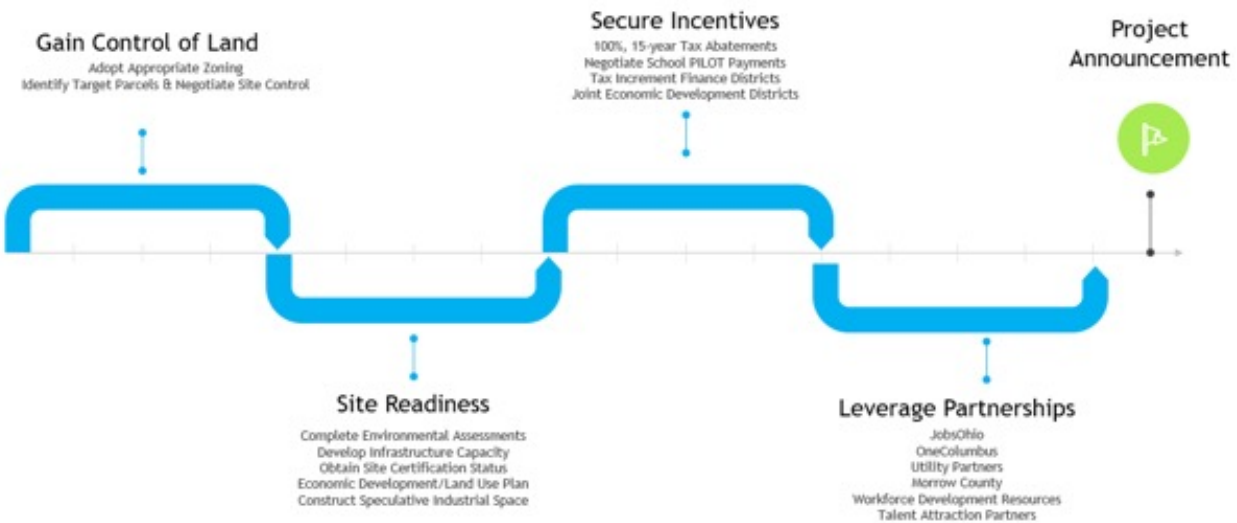
Morrow County Economic Development Action Plan Tactic #3 –Implement Morrow County Industrial Site Development Marketing Strategy around key sites along the Interstate 71 corridor in leading and emerging industry sectors which include Advanced Manufacturing, Semiconductor Supply Chain, and Logistics & Distribution and develop an incentives policy to attract new investment to key sites.

Morrow County is one of Ohio's unique rural communities in that it is home to two interchanges along the major north – south Interstate 71 corridor that connects Cleveland and the northeast Ohio region to Louisville, Kentucky. Interchanges in the villages of Chesterville and Marengo are surrounded by an abundance of land available for development and public infrastructure assets such as water, sanitary sewer, and roads that can accommodate industries that would likely find Morrow County an attractive location for new facilities.

Industrial site development action plan tactics are specific steps that provide a roadmap for a community to develop competitive sites and lay out strategies to fund those sites and encourage economic growth. Companies looking to locate or expand prefer locations that are "site ready" meaning they have infrastructure in place, are properly zoned, have environmental studies complete, and have tax incentive agreements in place. Action plan tactics should be developed, and key sites prioritized, which will serve as a guide to prepare sites for future development.



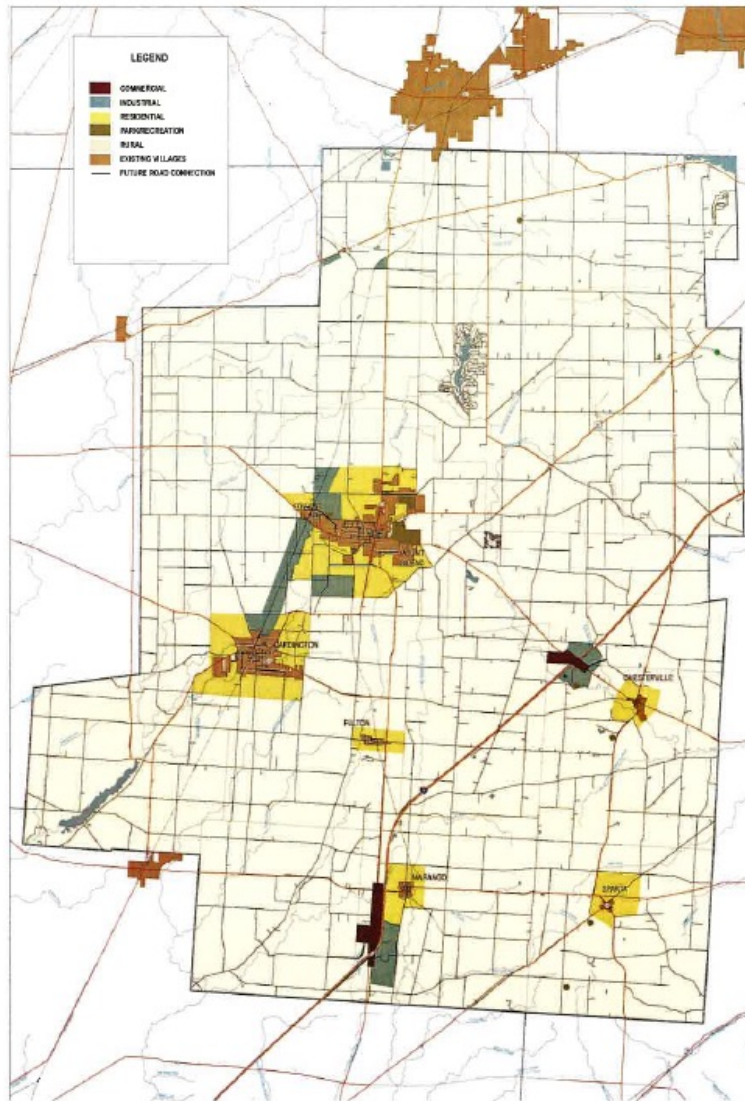
Morrow County Industrial Site Development Roadmap



1. Gain ownership or control of land for economic development purposes in targeted industry sectors by adopting appropriate zoning, identifying target parcels, and negotiating site control with property owners.
2. Prioritize and prepare sites for the attraction of companies in the leading industry sectors of Advanced manufacturing, Transportation and distribution facilities, and Semiconductor supply chain operations by working with utility and infrastructure partners to develop infrastructure capacity and obtain site certification status.
3. Utilize Morrow County tax incentives policy that includes 100%, 15-year tax abatements, negotiated local school donation agreements through PILOT payments, establish Tax Increment Finance and Joint Economic Development Districts that support necessary public infrastructure improvements and spur private sector capital investment.
4. Leverage partnerships with local, regional, and statewide economic development partners, including utilities, to incentivize and invest in economic development projects through a targeted business attraction strategy.
5. Successful implementation of a Morrow County Industrial Site Development Roadmap will lead to new economic development investments, creating new, high-wage jobs, and generating wealth in the Morrow County community.

The study area in the Morrow County Economic Development Strategic Plan includes two interchanges along the Interstate 71 corridor near the villages of Chesterville and Marengo, and sites adjacent to existing industrial facilities in Cardington and Edison, as shown in the Exhibits below. An infrastructure analysis was performed on each of the sites to identify infrastructure serving the areas and determine existing and future infrastructure capacity needed to attract new business to Morrow County. Prioritized sites include current zoning and how these sites align with Morrow County's future land use map.





Site Control. Legal control of land, through options or purchase, is the first step to developing a site. Public or private parties may take the lead in this real estate transaction as third parties are often engaged to collect real estate for larger developments. The term “site control” simply means gaining some form of right to acquire or lease a property or parcel(s). The type of site control that can be achieved depends on many factors, including the owner’s interests and the timing and stage of financing commitments.

Morrow County Potential Development Sites

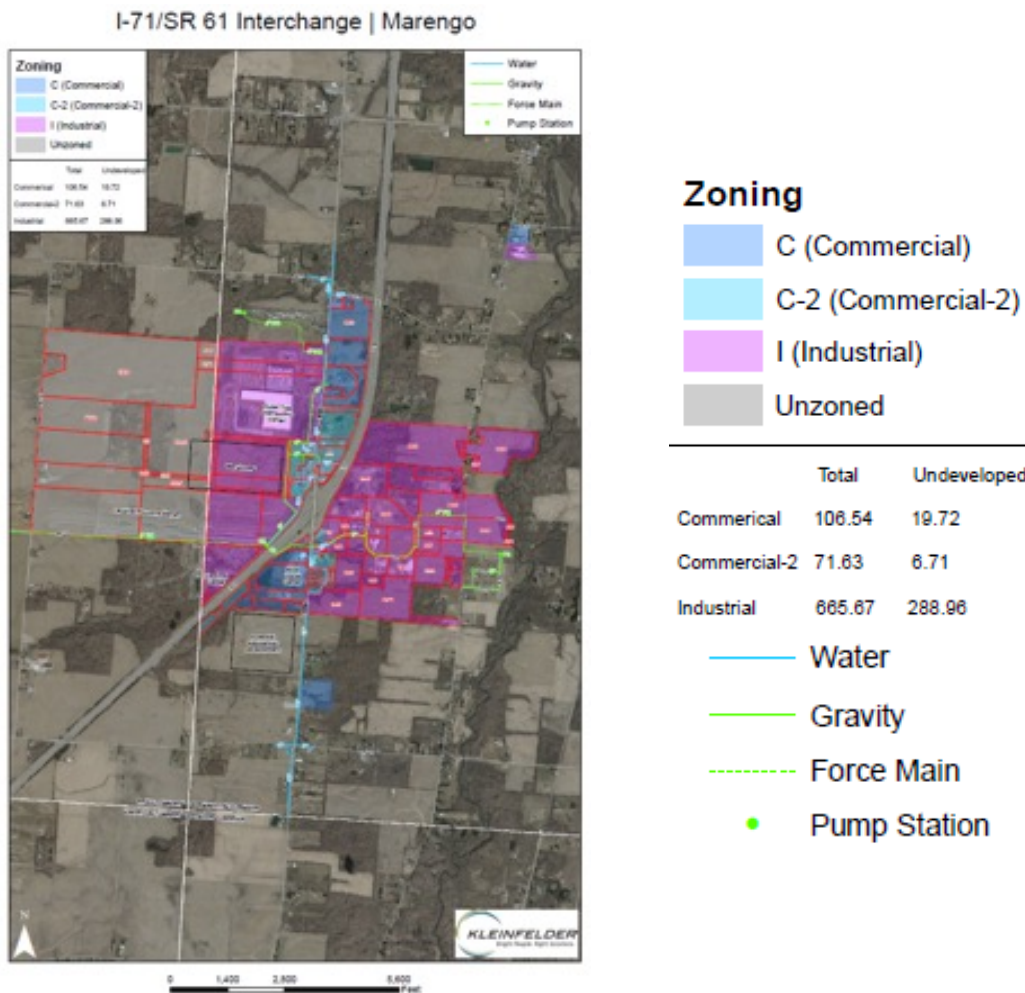
Priority Site	Potential Development
I-71/State Route 61 – Marengo	Industrial/Commercial/Residential
I-71/State Route 95 – Chesterville	Industrial/Commercial/Residential
U.S. Route 42 – Cardington	Residential
State Route 95 – Edison & Mt. Gilead	Industrial/Residential

Zoning. Once control is established, sites need to be properly zoned for the intended use by the relevant local government. No development can happen without proper local land use approval. Whether the site is located in a city or township (unincorporate area of a county), land use regulation occurs in Ohio. Ohio’s zoning laws identify the types of economic activity permitted at a site, has operated for nearly one hundred years, and is authorized by state law empowering local governments to develop and implement local zoning codes and creates methods to enforce these codes that provide needed flexibility.



Land Use/Economic Development Plan. A land use and economic development plan is then essential to ensure critical infrastructure, incentives and construction costs are understood and a target list of industries and ultimately companies are created based upon an economic cluster analysis of the region. Tax incentives should be considered for each site in question to reduce the cost of land and construction and/or to address the necessary infrastructure costs at each priority site. Key infrastructure ranges from water, sanitary sewer, roads, highway access, rail, and power access needed for company development. The industry focus of these sites should center around advanced manufacturing operations, firms related to the Intel semiconductor supply chain, and distribution and fulfillment operations. Morrow County is fortunate to have multiple interchanges along the Interstate 71 corridor and rail-served sites that targeted industry sectors would benefit from. Morrow County has identified several potential industrial sites primed for development. These include Interstate 71 and State Route 61 near Marengo, Interstate 71 and State Route 95 near Chesterville, U.S Route 42 in Cardington, and State Route 95 between Edison and Mt. Gilead.

Interstate 71 & State Route 61 Corridor Interchange - Marengo



The village of Marengo is in the south – central portion of Morrow County with Interstate 71 traversing the western border of the village. Land use along the western portion of the I-71/State Route 61 corridor has been identified for a mix of agricultural, industrial, and commercial development; land use along the eastern portion of the I-71/State Route 61 corridor has been identified as agricultural, industrial, commercial, and scattered residential. Dollar Tree Distribution Center is located along State Route 61 west of I-71 and future distribution and fulfillment operations are anticipated for the area south of Dollar Tree. In addition to the Dollar Tree Distribution Center, commercial and industrial developments such as Champion Manufacturing, Cardinal Shooting Range, Hensel Ready Mix, Nippon Rika, Inc., and Pilot Travel Center are located at this interchange.

In 2018, Morrow County successfully attracted a \$120 million investment by Dollar Tree Distribution Center to locate their 1,200,000 square foot distribution facility in southern Morrow County. As part of that development effort, the Commissioners agreed to purchase the privately owned SoMoCo Sanitary Sewer located along County Road 225 in Peru Township. In early 2022, Morrow County Commissioners secured a \$2,070,000 grant to improve Southern Morrow County (SoMoCo) Sanitary Sewer System that provides service to the State Route 61/Interstate 71 interchange and nearby businesses in Bennington and Peru townships. The grant awarded through the Ohio BUILDS Public Infrastructure Grant Program will fund a significant upgrade to the current SoMoCo Sanitary Sewer treatment process for effluent from the SoMoCo lagoon system, enabling it to meet the highest standards of discharge required by the Ohio EPA. These improvements will allow for direct discharge to Alum Creek and eliminate the need for land application of effluent on a 120-acre field along County Road 218.

The total amount of zoned undeveloped acreage in this area includes:

- i. Commercial (C) - 19.72 undeveloped acres
- ii. Commercial (C-2) – 6.71 undeveloped acres
- iii. Industrial (I) – 289 undeveloped acres

Commercial C and C-2 Property Analysis. Projected water and wastewater flows in gallons per day, per acre for Commercial (C) and Commercial (C-2) areas is 2,000 GPD. Based on engineering analysis and assuming a developed percentage of 80% for undeveloped land, recommended sewer size for this area is based on 2,000 GPD/acre with a peaking factor of 3. This takes into account sizing sewers to account for road improvements, Right of Way, set back requirements, and other local governmental land use restrictions. The Average Daily Flow for 21 developed acres (80%) at 2,000 GPD/acre would be 42,000 GPD. The Peak Design Flow for 21 developed acres (80%) at 2,000 GPD/acre at a peaking factor of 3 would be 126,000 GPD. Based on a peak design flow of 210,000 GPD, a minimum of an 8-inch gravity sewer would be needed for this area. This area is serviced by the SoMoCo Wastewater Treatment Plant that has a current average flow of 60,000 gallons per day, with a current maximum permit capacity of 150,000 gallons per day. With an updated permit to Class 2 status, SoMoCo's maximum capacity is 350,000 gallons per day. If the undeveloped commercial acreage were to be fully developed there would not be enough existing capacity to service these areas.

Industrial Property Analysis. Projected water and wastewater flows in gallons per day, per acre for Industrial (I) areas is 2,500 GPD. Based on engineering analysis and assuming a developed percentage of 80% for undeveloped land, recommended sewer size for this area is based on 2,500 GPD/acre with a peaking factor of 3. This takes into account sizing sewers to account for road improvements, Right of Way, set back requirements, and other local governmental land use restrictions. The Average Daily Flow for 231 developed acres (80%) at 2,500 GPD/acre would be 577,500 GPD. The Peak Design Flow for 231 developed acres (80%) at 2,500 GPD/acre at a peaking factor of 3 would be 1,723,500 GPD. Based on a peak design flow of 1,723,500 GPD, a minimum of an 18-inch gravity sewer would be needed for this area. This area is serviced by the SoMoCo Wastewater Treatment Plant that has a current average flow of 60,000 gallons per day, with a current maximum permit capacity of 150,000 gallons per day. The maximum capacity can be expanded up to 350,000 gallons per day. If the undeveloped industrial acreage were to be fully developed there would not be enough existing capacity to service these areas.

ODOT has worked together with Morrow County and Burgess & Niple to study the I-71 corridor in the area around this interchange to State Route 229. Traffic along the corridor is approximately 12,500 vehicles per day, which is the highest traffic volume corridor in Morrow County, excluding I-71, and the highest accident density in the county. Burgess & Niple has recommended a Roundabout be constructed at State Route 61 and State Route 229. In 2022, ODOT announced a \$3.6 million award to fund construction of the Roundabout and accompanying safety improvements out of ODOT FY25 Safety Program funds.^{iv} Roundabouts are significantly safer than traditional intersections and can increase the Level of Service of the intersection moving vehicles more efficiently and safely than a traffic signal.

As new business development activities within the central Ohio region continue to emerge within the advanced manufacturing, semiconductor supply chain, and distribution and fulfillment sectors, Morrow County should:



1. Promote the Interstate 71/State Route 61 intersection for its accessibility, availability of land, and public infrastructure assets by targeting advanced manufacturing and distribution and fulfillment operations along the east and west of I-71.
2. Attract developers to the interchange and construct speculative industrial space and target companies in the advanced manufacturing and distribution and fulfillment sectors, primarily on the east side of I-71, and pursue speculative funding programs like the Ohio Department of Development Rural Industrial Park Loan Program.
3. Market sites primarily to the east, northeast, and southeast of I-71 to residential developers and incentivize residential development through a 100%, 15-year CRA tax abatement. A 200-unit residential project is currently under consideration north of Dollar Tree and Bennington Springs Mobile Home Park on the northwestern portion of the I-71/State Route 61 interchange.
4. Implement roadwork improvements as recommended by ODOT when the Traffic Impact study is completed and as funding becomes available.

Should a large utility user locate at this interchange, significant improvements may be required to accommodate such demand. Morrow County should conduct detailed planning and design for larger demand type projects.

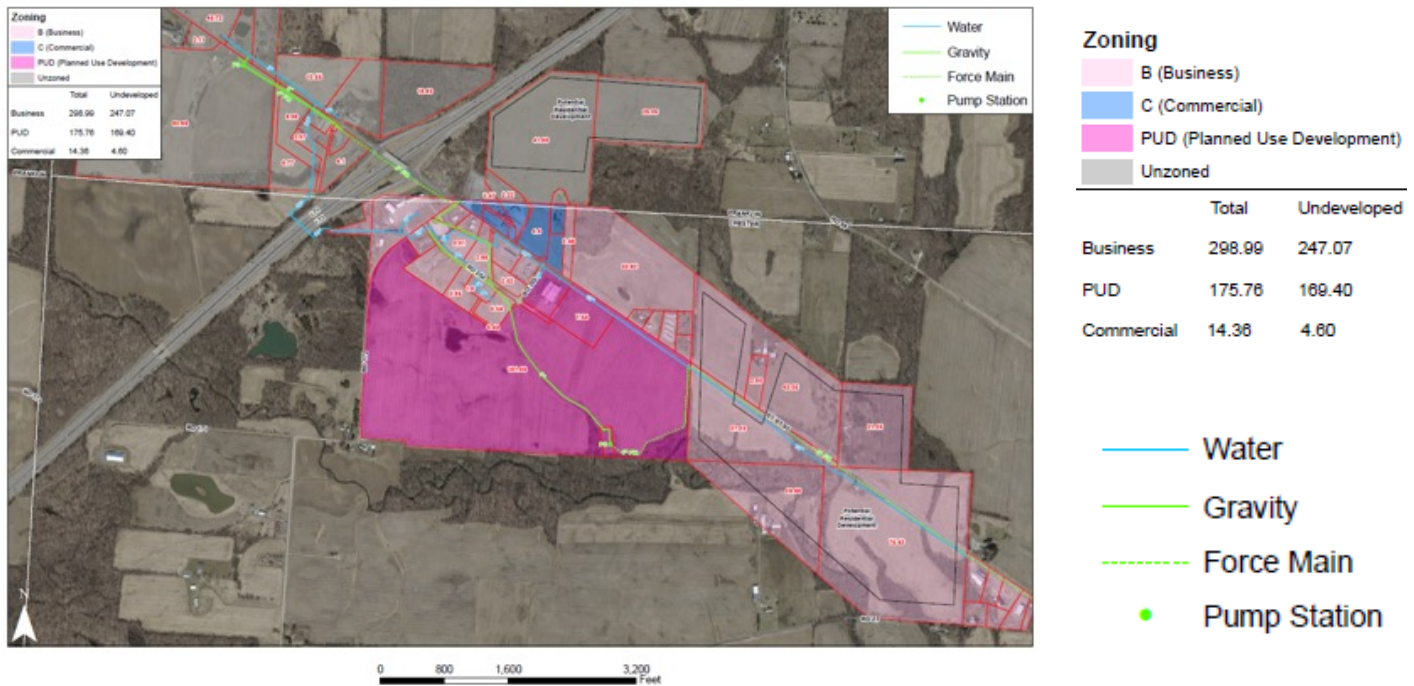
Interstate 71/State Route 61 Industrial Site Infrastructure Overview

Utility	Provider	Description
Water	DelCo Water Company	12" line running south along State Route 61
Sanitary Sewer	Southern Morrow County Sewer System (SoMoCo)	8" line running south along State Route 61 Average Demand – 60,000 gpd Maximum Capacity – 150,000 gpd Growth Potential – 350,000 gpd
Electric	Consolidated Electric Cooperative	Availability based on specific project needs
Natural Gas	Consolidated Electric Cooperative	Detailed information not available for this site
State Route 61	State of Ohio/Morrow County, Ohio	Average Daily Traffic Counts (north of State Route 229) – 6,805 Average Daily Traffic Counts (south of State Route 229) – 12,462
Interstate 71	U.S. Department of Transportation	Average Daily Traffic Counts – 57,401



Interstate 71 & State Route 95 Corridor Interchange - Chesterville

I-71/SR 95 Interchange | Chesterville



The Interstate 71/State Route 95 interchange is located in the east – central portion of Morrow County west of the village of Chesterville. Land use along the corridor has been identified as primarily agricultural, with business and Planned Use Development (PUD) zoning in place adjacent to State Route 95 heading east towards the village of Chesterville.

Primary development around I-71 and State Route 95 interchange includes national and local retail and commercial developments such as BP Gas Station, McDonald's, Shell Gas Station, Wendy's, and 8 Sister's Bakery. Chester Crossing Apartments are also located along State Route 95 southeast of the I-71 interchange and south of retail and commercial developments.

Environmental assessments have been performed by the Morrow County Development Office, with funding support from Consolidated Electric Cooperative. TetraTech conducted environmental assessments north of State Route 95 that did not include parcels within the PUD. The PUD should undergo at a minimum a Phase I environmental assessment to position the area for attracting development. Consolidated Electric Cooperative provides natural gas and electric services that are currently located at State Route 95 and could be extended further east to development sites. Some natural gas limitations exist along this route, however, depending on the end use of the site, improvements to the natural gas line may not be necessary. Should a large utility user locate at this interchange, significant improvements may be required to accommodate such demand outside of the analysis below. Morrow County should conduct detailed planning and design for larger demand type projects, if necessary.

The total amount of zoned undeveloped acreage in this area includes:

- Business (B) – 247.07 undeveloped acres
- Commercial (C-2) – 4.60 undeveloped acres
- Planned Use Development (PUD) – 169.40 undeveloped acres



Business B Property Analysis. Projected water and wastewater flows in gallons per day, per acre for the Business (B) area is 2,000 GPD. Based on engineering analysis and assuming a developed percentage of 80% for undeveloped land, recommended sewer size for this area is based on 2,000 GPD/acre with a peaking factor of 3. This takes into account sizing sewers to account for road improvements, Right of Way, set back requirements, and other local governmental land use restrictions. The Average Daily Flow for 198 developed acres (80%) at 2,000 GPD/acre would be 396,000 GPD. The Peak Design Flow for 198 developed acres (80%) at 2,000 GPD/acre at a peaking factor of 3 would be 1,188,000 GPD. Based on a peak design flow of 1,188,000 GPD, a minimum of a 12 to 15-inch gravity sewer would be needed for this area. This area is serviced by the Chesterville Wastewater Treatment Plant that has a current average flow of 40,000 gallons per day, with a current maximum capacity of 80,000 gallons per day. The maximum capacity can be expanded up to 160,000 gallons per day. If the undeveloped business, commercial, and PUD acreage were to be fully developed there would not be enough existing capacity to service these areas.

Commercial C Property Analysis. Projected water and wastewater flows in gallons per day, per acre for the Commercial (C) area is 2,000 GPD. Based on engineering analysis and assuming a developed percentage of 80% for undeveloped land, recommended sewer size for this area is based on 2,000 GPD/acre with a peaking factor of 3. This takes into account sizing sewers to account for road improvements, Right of Way, set back requirements, and other local governmental land use restrictions. The Average Daily Flow for 3.68 developed acres (80%) at 2,000 GPD/acre would be 7,360 GPD. The Peak Design Flow for 3.68 developed acres (80%) at 2,000 GPD/acre at a peaking factor of 3 would be 22,080 GPD. Based on a peak design flow of 22,080 GPD, a minimum of an 8-inch gravity sewer would be needed for this area. This area is serviced by the Chesterville Wastewater Treatment Plant that has a current average flow of 40,000 gallons per day, with a current maximum capacity of 80,000 gallons per day. The maximum capacity can be expanded up to 160,000 gallons per day. If the undeveloped business, commercial, and PUD acreage were to be fully developed there would not be enough existing capacity to service these areas.

Planned Use Development Property Analysis. Projected water and wastewater flows in gallons per day, per acre for the Planned Use Development (PUD) area is 2,000 GPD. Based on engineering analysis and assuming a developed percentage of 80% for undeveloped land, recommended sewer size for this area is based on 2,000 GPD/acre with a peaking factor of 3. This takes into account sizing sewers to account for road improvements, Right of Way, set back requirements, and other local governmental land use restrictions. The Average Daily Flow for 135 developed acres (80%) at 2,000 GPD/acre would be 270,000 GPD. The Peak Design Flow for 135 developed acres (80%) at 2,000 GPD/acre at a peaking factor of 3 would be 810,000 GPD. Based on a peak design flow of 810,000 GPD, a minimum of a 12-inch gravity sewer would be needed for this area. This area is serviced by the Chesterville Wastewater Treatment Plant that has a current average flow of 40,000 gallons per day, with a current maximum capacity of 80,000 gallons per day. The maximum capacity can be expanded up to 160,000 gallons per day. If the undeveloped business, commercial, and PUD acreage were to be fully developed there would not be enough existing capacity to service these areas.

From a transportation analysis standpoint, traffic along State Route 95 is approximately 6,500 vehicles per day and the area directly to the east of the interchange is just over 9,000 vehicles per day. ODOT is in the early stages of studying this area and the County should, in coordination with ODOT, implement recommendations of this study once it is completed and funding becomes available. As the corridor along State Route 95 continues to develop, localized improvements may be required such as left or right turn lanes, a two-way left turn lane and possibly roundabouts at the interchange ramps, Commerce Drive and Williamsport Crestline Road.



Morrow County should:

1. Target residential development opportunities along State Route 95 east of I-71 and agricultural land north of the Planned Use Development that is ideal for new residential.
2. Gain site control of agricultural acreage on the southwest and southeast sections of the I-71/State Route 95 interchange where adequate infrastructure exists and attract a private developer to construct speculative industrial space and targeting advanced manufacturing, using programs such as the Ohio Department of Development Rural Industrial Park Loan Program.
3. Prepare Traffic Impact studies for significant traffic generators to determine localized improvements.
4. Utilize an existing TIF District in this area to support necessary public infrastructure improvements to accommodate commercial, industrial, and residential growth.

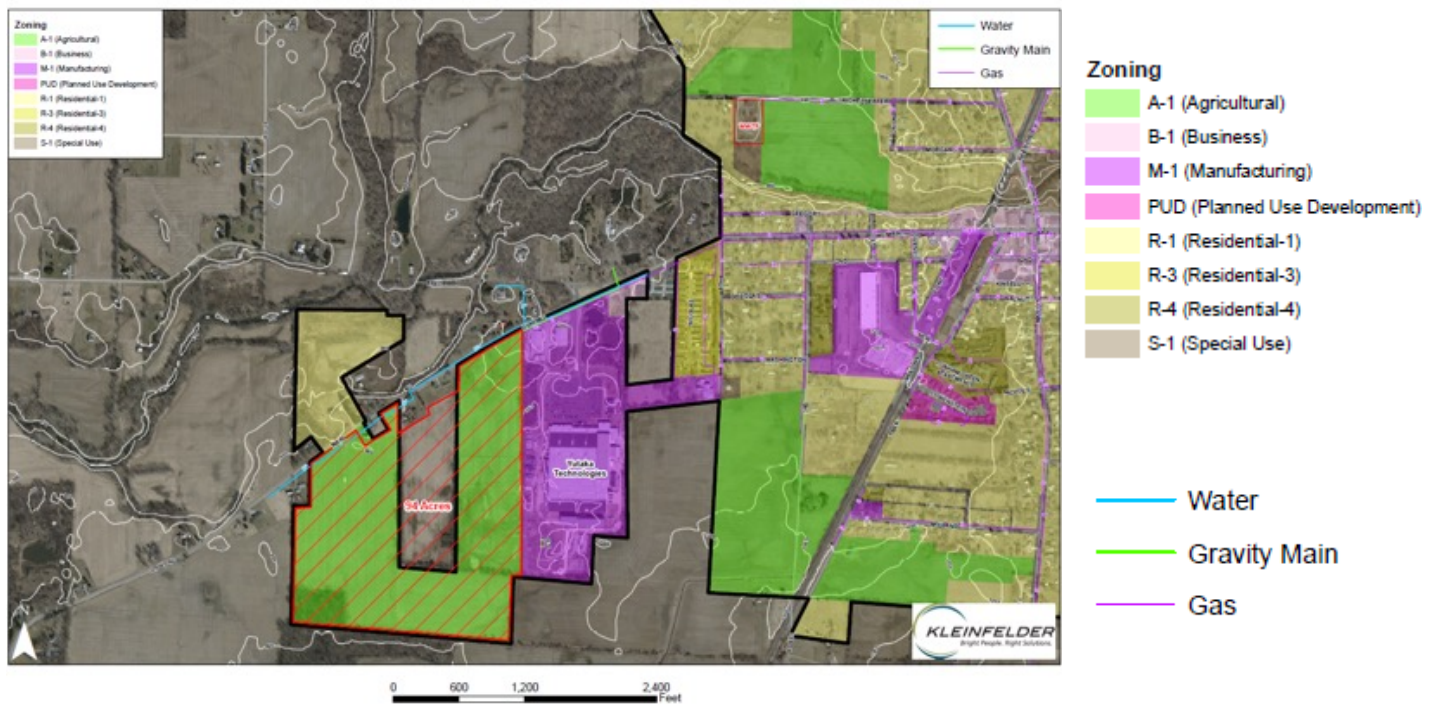
Interstate 71/State Route 95 Industrial Site Infrastructure Overview

Utility	Provider	Description
Water	DelCo Water Company	10" line along State Route 95, east/south of I-71 8" line along State Route 95, west of I-71
Sanitary Sewer	Southern Morrow County Sewer System (SoMoCo)	6" line along State Route 95, east of I-71 4" line along State Route 95, west of I-71 Average Demand – 40,000 gpd Maximum Capacity – 80,000 gpd Growth Potential – 160,000 gpd
Electric	FirstEnergy – Ohio Edison	Availability based on specific project needs
Natural Gas	Consolidated Electric Cooperative	Detailed information not available for this site
State Route 61	State of Ohio/Morrow County, Ohio	Average Daily Traffic Counts (west of interchange) – 6,265 Average Daily Traffic Counts (east of interchange) – 9,285
Interstate 71	U.S. Department of Transportation	Average Daily Traffic Counts (south of interchange) – 57,401 Average Daily Traffic Counts (north of interchange) – 54,521



US 42 Near Yukata Technologies | Cardington

US 42 Near Yutaka Technologies | Cardington



Primary development along U.S. Route 42 near the village of Cardington includes industrial development with Cardington Yutaka Technologies and Adalet Products. More than 200 acres of land is located near Cardington Yutaka Technologies with development opportunity; however, Morrow County and the village of Cardington should further analyze the need for sanitary sewer upgrades to accommodate future growth as the village of Cardington system is near capacity with approximately 75,000 gallons per day of excess capacity currently.

The village of Cardington has also identified land north of town as industrial, near existing rail infrastructure. While more than 400 acres of farmland exist to the east and west of the rail infrastructure between Cardington, Edison, and Mt. Gilead, roughly 56 acres is located near Cardington. Property surrounding Cardington Yutaka Technologies is currently zoned agricultural and residential zoning is in place in multiple areas along U.S. Route 42.

Analyzing transportation infrastructure along U.S. Route 42 corridor at the intersection of State Route 529 within Cardington, 5,000 vehicles per day travel U.S. Route 42 and 2,500 vehicles per day travel State Route 529. Cardington West and Cardington East Road is the main east-west road through the village with a traffic volume of approximately 1,200 vehicles per day. U.S. Route 42 and State Route 529 have capacity for future development however localized improvements could be made at intersections within the village to improve capacity. Morrow County, the state of Ohio, and local communities should consider whether the addition of left turns, signaling intersection, and possibly roundabouts are necessary in this area however based on current traffic volumes, notable improvements are not warranted at this time. Cardington West and Cardington East Road is narrow (20' +/-) and may need to be widened if development occurs.

The total amount of zoned undeveloped acreage in this area includes:

- i. Agricultural (A-1) – 94 undeveloped acres

Agricultural A-1 Property Analysis. Projected water and wastewater flows in gallons per day, per acre for the Agricultural (A-1) area is 500 GPD. Based on engineering analysis and assuming a developed percentage of 80% for undeveloped land, recommended sewer size for this area is based on 500 GPD/acre with a peaking factor of 3. This takes into account sizing sewers to account for road improvements, Right of Way, set back



requirements, and other local governmental land use restrictions. The Average Daily Flow for 75 developed acres (80%) at 500 GPD/acre would be 37,500 GPD. The Peak Design Flow for 75 developed acres (80%) at 500 GPD/acre at a peaking factor of 3 would be 112,500 GPD. Based on a peak design flow of 112,500 GPD, a minimum of an 8-inch gravity sewer would be needed for this area. This area is serviced by the Cardington Wastewater Treatment Plant that has a current average flow of 425,000 gallons per day, with a current maximum capacity of 500,000 gallons per day. If the undeveloped agricultural acreage were to be fully developed there would not be enough existing capacity to service this area, as the current average daily flow (425,000 GPD) plus the new peak flow from the agricultural area (112,500 GPD) is more than the current capacity of the wastewater treatment plant (500,000 GPD).

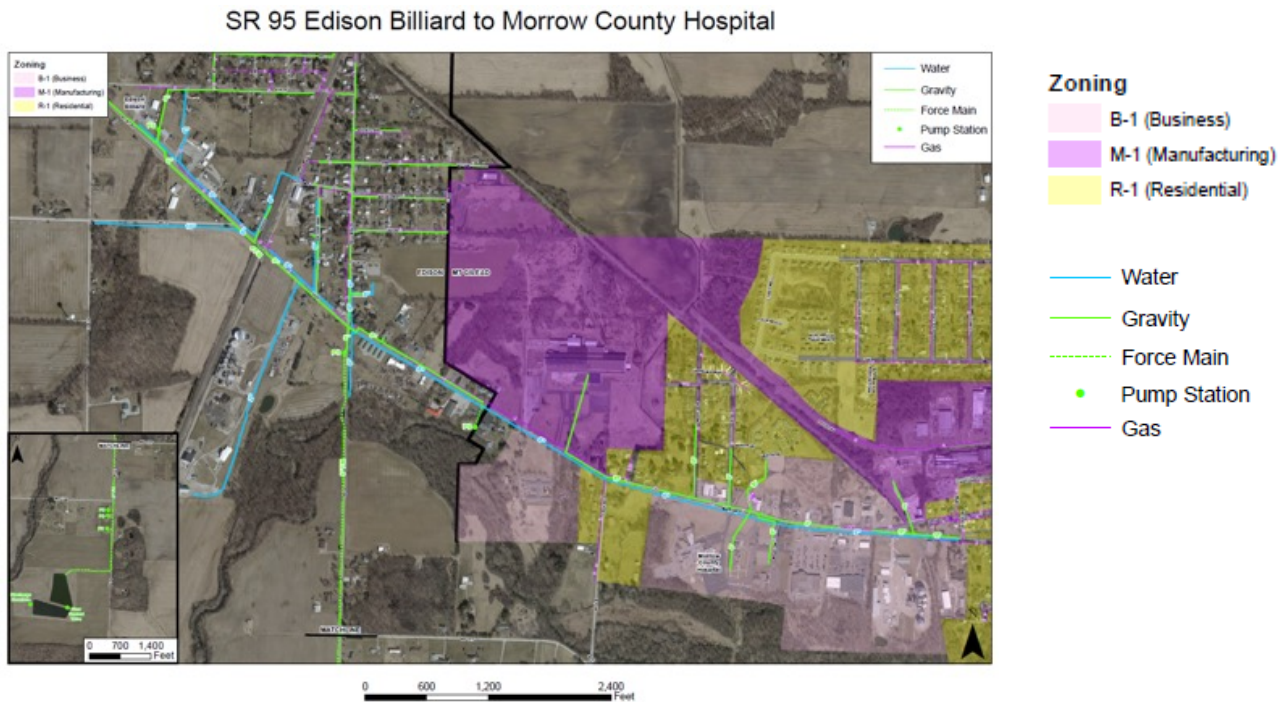
With limited sanitary sewer capacity available in this area, residential development should be the target for this corridor. Additionally, Traffic Impact studies should be prepared for significant traffic generators to determine necessary localized improvements.

U.S. Route 42 Industrial Site Infrastructure Overview

Utility	Provider	Description
Water	DelCo Water Company	6" line along U.S. Route 42
Sanitary Sewer	Village of Cardington	Average daily flow of 425,000 gpd with a maximum capacity of 500,000 gpd
Electric	FirstEnergy – Ohio Edison	Availability based on specific project needs
Natural Gas	Columbia Gas	Current infrastructure nearing capacity; future improvements may be necessary to accommodate industrial growth
U.S. Route 42	U.S. Department of Transportation/Morrow County, OH	Average Daily Traffic Counts (west of village) – 4,890



State Route 95 Corridor – Edison Billiard to Morrow County Hospital



Primary development along State Route 95 in Edison and between Edison and Mt. Gilead includes business/commercial, industrial, healthcare, and residential development including Asphalt Technologies and Morrow County Hospital. A 10" gravity sanitary sewer line along this State Route 95 corridor is served by Mt. Gilead and a rail spur runs south in Edison, west of the former HPM Corporation site where cleanup and building demolition is underway. The Morrow County Development Office has applied for \$300,000 in the state of Ohio Brownfield funds to complete Phase I and Phase II environmental assessments of the former HPM site necessary for its future, full development.

From a transportation infrastructure standpoint, approximately 7,000 vehicles per day travel State Route 95 along the Edison – Mt. Gilead corridor. The main intersecting road along this route is Cardington-Edison Iberia Road with approximately 2,100 vehicles per day. Cardington-Edison-Iberia Road is narrow (20' +/-) and may need widened if development occurs. State Route 95 can support development directly off of the State Route 95 route, however trucks traveling through the center of Mt. Gilead to and from Edison may create issues in Mt. Gilead.

Morrow County should:

1. Target industrial and manufacturing development at the former HPM Corporate site for companies needing rail-served sites.
2. Rezone and gain control of sites located south of the village of Edison and along the rail line and target advanced manufacturing, agribusiness, automotive component manufacturing, and semiconductor supply chain companies that could utilize access to rail infrastructure.
3. Conduct Traffic Impact studies to analyze significant traffic generators along State Route 95 to determine necessary localized improvements.
4. Limited undeveloped residential and business zoned property exists along State Route 95 and could be the location for future development. Morrow County and the village of Edison should further analyze public infrastructure capacities in water and sanitary sewer to ensure adequate capacities are available to attract these types of industries. Should intergovernmental cooperation be needed to facilitate economic development, Morrow County should consider establishing a Joint Economic Development District to allow for intergovernmental cooperation around investing in public infrastructure improvements.



State Route 95 Edison Billiard to Morrow County Hospital Site Infrastructure Overview

Utility	Provider	Description
Water	Mt. Gilead	6" – 8" line along State Route 95 Various 2" – 10" lines off State Route 95
Sanitary Sewer	Mt. Gilead Wastewater Treatment Plant	Average daily flow of 550,000 gpd with a maximum capacity of 820,000 gpd
Electric	FirstEnergy – Ohio Edison	Availability based on specific project needs
Natural Gas	Columbia Gas	Current infrastructure nearing capacity; future improvements may be necessary to accommodate industrial growth
U.S. Route 42	U.S. Department of Transportation/Morrow County, OH	Average Daily Traffic Counts (west of village) – 4,801 Average Daily Traffic Counts (in village) – 5,486 Average Daily Traffic Counts (east of village) – 7,059

MORROW COUNTY REGIONAL COMPARATIVE MARKET ANALYSIS

Comparables refer to data on properties that have recently sold or are currently on the market that are similar to and in the same geographic area as the property or properties of interest. Access to reliable comparable property information is important to determining the market value of property. While traditional residential comparative market analyses often refer to the Multiple Listing Service (MLS), for the Morrow County Cost Competitive Analysis, JobsOhio's SiteOhio database was used to collect and analyze data. Parameters for comparables that were used for the Cost Competitive Analysis included examining properties currently listed for sale or lease for industrial end uses within like communities in the Morrow County labor shed which include: Delaware, Crawford, Knox, Marion and Richland counties; are a minimum of 10 acres in size; includes properties that have access to rail service; and properties that are not rail served.

Number of Sites Examined	Average Acreage	Smallest Site	Largest Site	Rail Served Sites	Average Price per Acre	Price per Acre – Low	Price per Acre – High	Utility
50	58.14	10.0 acres	410.0 acres	9	\$47,818	\$19,000	\$125,000	Water

Source: JobsOhio SiteOhio

The comparative market analysis of site-ready properties within the Morrow County region demonstrates an average site of 58.14 acres with an average price per acre of \$47,818 meaning Morrow County properties should be listed for a price per acre similar to the average price per acre in order to be competitive for economic development capital investment projects. Currently, Morrow County does not have any active industrial sites listed on JobsOhio's SiteOhio database or LoopNet.

Infrastructure Funding. Next, funding from public and private sources is identified and gained to develop a site certified or site ready property that has the infrastructure in place ready for a company to locate. The high demand for site certified properties positions well communities that actually build out the infrastructure in anticipation of development occurring. The infrastructure funding comes through the local government with Tax Increment Financing, Capital Improvement Program funds, and Transportation Improvement Districts. State resources are provided through the Ohio Department of Transportation, JobsOhio, Ohio



Department of Development, Ohio Public Works Commission, Public Utilities Commission of Ohio, and the Ohio Rail Development Commission. Federal infrastructure sources are found at the Economic Development Administration within the U.S. Department of Commerce, Department of Housing and Urban Development and targeted grants from the U.S. Department of Transportation.

A majority of Morrow County targeted sites will need some degree of site planning that addresses the infrastructure needed to include service for roads, water, sewer, broadband and power. Currently the Ohio Department of Transportation is conducting traffic impact studies at the interchanges along Interstate 71 and Morrow County should look to those recommendations to determine proper funding mechanisms to address roadwork improvements with likely sources of funding coming from Ohio Department of Transportation programs.

Business Attraction Strategy. Finally, Morrow County should develop a targeted business attraction strategy to leverage the assets around key development sites throughout the county. Business attraction campaigns promote a community through marketing to companies likely to have an interest or link to the region. An industrial site development marketing and outreach plan defines key characteristics and assets of the sites and communities to be marketed, identifies prospect companies, and connects with these prospective companies through a variety of mediums. Using the industry sector cluster analysis and occupational and workforce strengths to identify industries Morrow County has a competitive advantage in will be a key component to the implementation of the strategy. Local companies are also a source for prospective development as they provide introductions to key suppliers and others with an interest to be more closely connected with their business. The Morrow County team should develop this campaign with a sound understanding of countywide assets to demonstrate how sites match the demands of future manufacturers, distributors, and industrial tenants.

Three key best practices that will help Morrow County reach its target audience include:

1. Build out of essential content of Morrow County sites to include overall lot sizes, key property features such as availability of public and private infrastructure, the location of the property and its proximity to major transportation assets such as highways and intermodal facilities, and development of current and potential configurations of the property so a prospect can see themselves at the site.
2. Develop an outreach campaign to expand the reach of marketing efforts beyond the targeted industry sector companies to audiences that include brokers, site selectors, and industrial developers.
3. Utilize local, regional, and state partnerships to market properties using the collateral materials created, including OneColumbus and JobsOhio.

Morrow County should build out the essential content of sites so prospects clearly identify Morrow County targeted site assets. Before any effective business attraction campaign can begin Morrow County needs to develop professional marketing materials that can be used in multiple formats to advertise the various sites. These materials should incorporate key aspects of the properties Morrow County wants to clearly convey to the targeted audience to present the argument for the competitive nature of Morrow County sites. Property cards, images, and video content should be developed and used across social media platforms, direct mail campaigns, and on the site and building databases of Morrow County, OneColumbus, and JobsOhio. Public agencies and other owners of industrial real estate that rely solely on the Internet to market properties and drive interest into a community must realize that the dynamics and platforms for marketing online have changed. The Morrow County team should consider identifying specific platforms to utilize and focus on a rhythm of outreach to prospects through those mediums. This can include social media platforms such as LinkedIn, Twitter, Instagram and Facebook, as well as extensive use of email marketing campaigns and search engine optimization. Additionally, the Morrow County team should consider a rhythm of outreach using more traditional means such as email, letter writing and postcards to real estate brokers, utility partners, companies and site selection consultants.

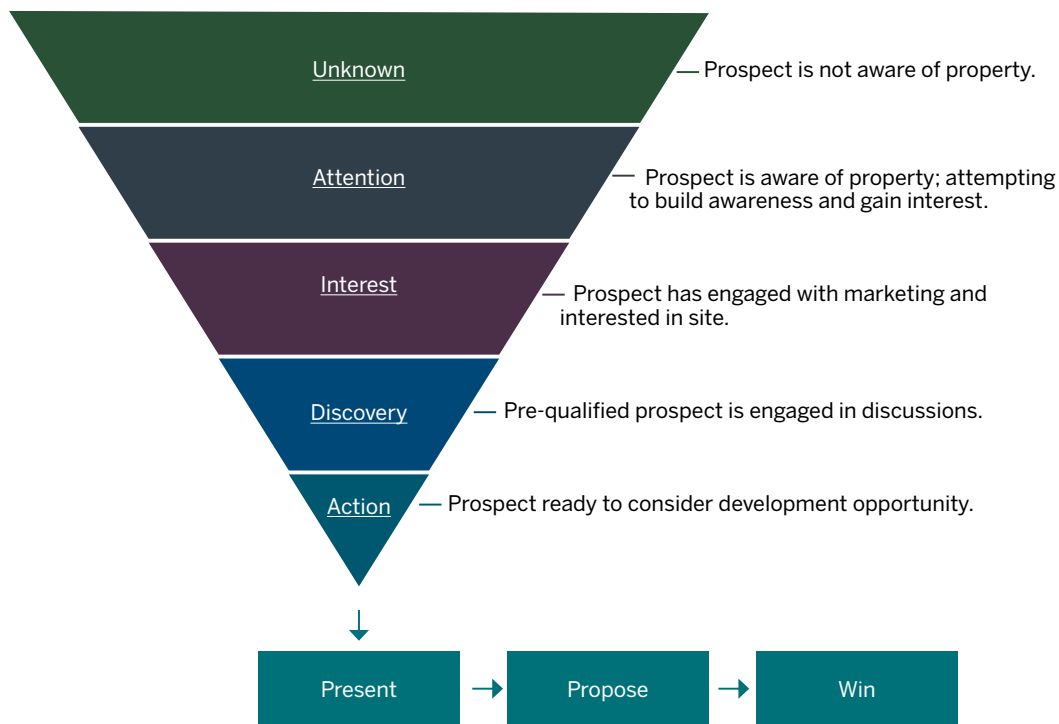
Morrow County should give careful consideration to how data can be used to both measure the performance of the business attraction strategy and market to the community in a way that assists businesses in making site location decisions. The International Economic Development Council (IEDC) states that data can be a powerful differentiator in economic development. Keeping in mind that data drives a majority of site selection decisions, Morrow County should leverage data access, messaging and partnerships to present the key assets of the community and give target audiences the information necessary to make confident location



decisions. The more available, robust, and up to date the data, the more likely it is for communities to see a better evaluation and higher probability for business expansions and relocations.^{lv}

Develop an outreach campaign to expand the reach of marketing efforts beyond existing audiences. Following a traditional sales funnel model, the goal of the Morrow County Business Attraction & Marketing Strategy should be the ability to attract the attention of targeted “prospects,” develop interest in Morrow County sites, engage the “prospect” in discovering how their project aligns with Morrow County’s assets and opportunities, and securing commitments for capital investment.

Traditional Sales Funnel Model



Research & Build Prospect Lists. To focus on gaining prospects into the sales funnel, the Morrow County team should first identify the types of prospects it wishes to pursue. Based on the existing sites and potential new sites, the primary target prospects would likely be focused in advanced manufacturing, transportation and distribution, and semiconductor supply chain sectors. The Morrow County team should develop action steps to manage and deploy the strategy.

Action Steps:

- Identify geographic target markets of prospects (central Ohio, northern Ohio, central Indiana, eastern Indiana, western Pennsylvania, state of Arizona, Midwest);
- Identify types of prospects to pursue (industry-specific companies, developers, site selectors, real estate brokers);
- Build target prospect lists by industry sector (advanced manufacturing, transportation and warehousing, and semiconductor supply chain) and types of prospects to pursue; and
- Engage a firm to lead and manage the deployment of a robust and consistent business attraction marketing and outreach strategy.

The Morrow County team should understand the roles and responsibilities of the prospect company’s key contacts including the key influences of the contacts. Understanding these roles and responsibilities will help frame the information shared and focus the conversation on issues that matter most to the prospect contact. Questions to consider include:



- What are the contact's responsibilities at the company?
- What decision-making authority do they hold?
- What are the company's pain points and personal pain points of the contact? What goals are they targeting for their company?
- What common questions do they ask around those pain points and goals where the Morrow County sites could be a solution to alleviating pain and achieving goals?
- How far is the company into their decision-making process?
- What do they value most about the Morrow County sites?
- What call to action can you leave the prospect with to further explore solutions Morrow County offers?

Using these questions as a baseline for engaging in prospect conversations will help with the conversion of calls to action and drive the Morrow County business attraction efforts further down the sales funnel. Another way to think of the sales funnel is as a conversion process and follows the following path:

The Business Attraction Strategy Conversion Process



Build Rhythm of Outreach to Prospects. Focusing on the targeted list of prospective developers, site selectors, and brokers, a rhythm of outreach should be established to keep the property top of mind and as a means to encourage prospect engagement in the interest, discovery, and action stages of the sales funnel.

Prospect Rhythm of Outreach Cycle



Measure the Results. Having metrics to track the impact the Morrow County Business Attraction Strategy is having is important to both determining the effectiveness of messaging on the targeted audience and whether the strategy needs to be realigned and provides useful data to report back to Morrow County leadership on outcomes of the campaign. Methods for measuring the results should include setting baseline benchmarks to periodically compare and assess the campaign’s impact. Morrow County should consider measuring results that include Awareness, Engagement, Livelihood, and Vitality measures. An **Awareness** measurement looks at to what degree is Morrow County recognized in the industry and answers the question of whether those you are trying to target are finding and consuming your messaging. The metric for measuring this effectiveness looks at website visits, click-thru rates, and social media interaction. An **Engagement** measurement identifies conversations with the targeted audience as being an essential function of effective outreach. Bridging the gap for a prospect who needs more information to evaluate site competitiveness and generating meaning conversations about doing business in Morrow County communities will be key to building awareness. The metric for measuring engagement should quantify conversations generated with the target audience. **Livelihood** is another measurement that can help define the effectiveness of a business attraction strategy. Livelihood looks at economic development activities that improve the tax base, create new employment opportunities, and challenge the workforce to build skill sets needed to take in demand jobs. The primary measurement of this activity is the number of new jobs announced. A final measurement to consider is **Vitality**. Vitality accounts for revenue generated through economic development projects that support, maintain, and improve community infrastructure (roads, parks, libraries, emergency services) and increase the overall standard of living in a community. Key vitality metrics look at total capital investment announcements.

AWARENESS	ENGAGEMENT	LIVELIHOOD	VITALITY
To what degree is Morrow County recognized in the industry? Are those you are trying to target finding and consuming your messaging?	Conversations are essential – bridging the gap for a prospect who needs more information to evaluate site competitiveness and generating meaning conversations about doing business in Morrow County communities.	Economic development activities improve the tax base, create new employment opportunities, and challenge the workforce to build skill sets.	Revenue generated through economic development projects supports, maintains, and improves community infrastructure (roads, parks, libraries, emergency services) and increases the overall standard of living in a community.
The Metric: Website Visits, Click-Thru Rates, Social Media Interaction	The Metric: Conversations Generated with Target Audience	The Metric: Jobs Announced	The Metric: Capital Investment Announced

Source: *The Road to Economic Development Marketing Reinvention*, Atlas Advertising

Utilize local, regional, and state partnerships to market properties using the collateral materials created. City, regional, and state partners are key partners to a successful business attraction campaign. Prospects, brokers, and site selectors seek out information at various levels and from various reliable economic development sources. Equipping Morrow County, economic development stakeholders, regional partners, and state partners with information about key sites can be advantageous. This data sharing allows more detailed and comparative modeling between locations and regions and streamlines a prospects competitiveness modeling analysis when determining where to locate a facility and make a capital investment.

Morrow County Economic Development Action Plan Tactic #4 – Morrow County should support private, developer-led residential investments to increase the overall housing inventory in Morrow County which will support the attraction of a diverse cross-section of talent.

Residential development in growing and struggling markets has never been more important to a region's economic success. However, residential development does not simply happen with private sector investment. Local and state governments play a critical role in the development of residential projects. Central Ohio is a growing job market attracting a young, highly educated workforce. The 11-county Central Ohio region had a net gain of 238,000 people from 2010 to 2020 with that growth prime to jump even more with the announcement of a \$20 B Intel facility. Central Ohio is not meeting the demand for residential development, with the Columbus region needing 14,000 new residential units a year but is only building 8,000 annually and home values have increased by 85% over the last five years. Central Ohio offers multiple markets primed for residential growth and areas that succeed in the residential space will need to have economic development incentives designed to attract residential development. Ohio economic incentive programs prime the pump for residential development. Ohio cities and townships can provide real estate property tax abatements to incentivize residential property development through the Community Reinvestment Program (CRA) which includes Pre-1994 CRAs that offer a full 100%, 15-year real property tax abatement for future taxes and Post-1994 CRAs that offer a range of real property tax abatements as negotiated with local political jurisdictions and school districts. Ohio cities and townships can also provide public infrastructure for residential development through Tax Increment Financing and New Community Authorities, and Ohio port authorities can provide sales tax exemptions for construction material purchases for economic development projects including potentially residential development. Ohio provides tax credits for residential development through the Ohio Historic Preservation Tax Credit Program, Ohio New Markets Tax Credit Program, Ohio Opportunity Zone Tax Credit Program and the Ohio Transformational Mixed Used Development program offers \$100 M in premium tax credits for large-scale mixed-use projects.

According to a 2019 Ohio Heartland Community Assessment, Morrow County had 2,538 total renter-occupied housing units out of a total 14,338 available housing units.^{lvi} Average rental rates between 2013-2017 were \$646, which was a 7.8 percent decrease from the 2007-2011 timeframe.^{lvii} While rental rates declined during this timeframe, so too did the total number of housing units. Morrow County saw a decline of 0.49 percent of total housing units while seeing a population increase of 0.48 percent. As of 2019, the county had 162 active HUD-subsidized rental properties, 56 USDA Rural Development subsidized rental properties, and 187 Federal Housing Tax Credit properties for individuals from low-income households.^{lviii}

The Building Industry of Central Ohio (BIA) commissioned a housing needs assessment for the 10-county region in central Ohio to estimate the need for new residential housing based on the projected job growth the region anticipates through the year 2032. The report concluded that the BIA's 10-county region is projected to gain approximately 145,000 to 202,000 jobs through 2023 and there will be a corresponding need for additional housing units to accommodate and realize this job growth.^{lix} Furthermore, the report concluded there are indicators that the Columbus region may not be positioned to address the housing need and the region may face future challenges if development activity does not keep pace with job growth projections.^{lx} The table below summarizes estimated housing need projections through 2032 for Morrow County.

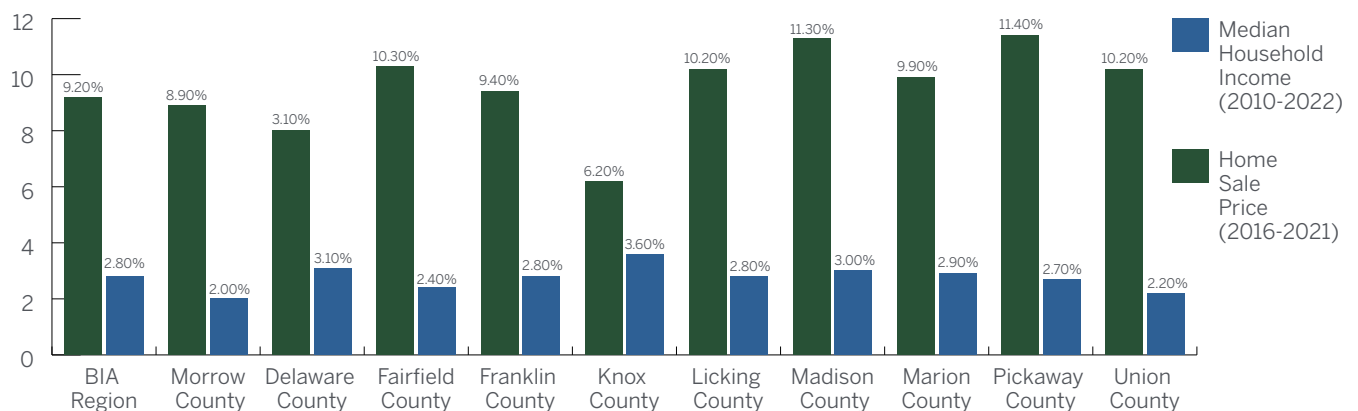


Geography	Renter		Owner		All	
	1990-2019 Historical Growth Trend	2010-2019 Historical Growth Trend	1990-2019 Historical Growth Trend	2010-2019 Historical Growth Trend	1990-2019 Historical Growth Trend	2010-2019 Historical Growth Trend
BIA Region	66,744	93,130	71,915	100,346	138,659	193,476
Morrow County	220	164	712	531	932	695

Source: Vogt Strategic Insights; Department of Labor Statistics; Ohio Department of Job and Family Services, Esri, Inc.

Based on BIA's estimates, permitting activity needs to increase by approximately two-fold throughout the region based on recent trends over the past decade to meet the projected housing need over the next decade.^{lxi} From a price and affordability standpoint, the compounded annual growth rate in home price is more than three times the compounded annual growth rate in the median household income.^{lxii} These trends will further exacerbate affordability housing challenges in the central Ohio region and will limit the Columbus market from realizing projected job growth.

Compounded Annual Growth Rate (Home Sales and Household Incomes)



Source: U.S. Census; Vogt Strategic Insights; American Community Survey (ACS); Esri, Inc. Urban Decision Group; Redfin

In order to meet the community's housing needs over the next decade, Morrow County should conduct a comprehensive Housing Market Analysis that summarizes the current housing landscape and trends in the housing market in the county, defines what potential home buyers are willing to spend on new housing and the types of housing desired by potential buyers, and identifies target areas for future residential housing growth and overlays these growth areas with forecasted housing needs of the community. Key elements of this analysis should include:

1. *Morrow County Current Housing Trends* - Examine housing trends within the Morrow County region to gain an understanding of key data points that define whether Morrow County is in a buyers-market or sellers-market. Key data to examine types of existing housing units within Morrow County, such as single-family and multi-family units, trends with average and median sale prices, and days on the market across multiple price points.
2. *Morrow County Forecasted Housing Needs* –Analyze housing needs within Morrow County to determine the types of units needed and demanded in the market by conducting an inventory of the number of occupied units versus vacant units to understand where inventory exists and what the estimated



shortage in new home starts will be. Additionally, the housing study should include a public survey of the Morrow County community to determine the types of housing (single-family, townhomes, condos, etc.) most desirable to future buyers. This survey will look not only at the types of housing but will also examine the price bands of potential buyers, areas within the community they desire to live, and the types of floorplans (multi-story, ranch-style, etc.) most appealing to potential buyers.

ENDNOTES

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