



National Rd. Business Park – Muskingum County



# 2021 CEDS ANNUAL UPDATE

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

OHIO MID-EASTERN GOVERNMENTS ASSOCIATION

OMEGA

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## SECTION 1: ADJUSTMENT TO THE STRATEGY

To present a true regional growth plan and demonstrate commitment to high-value linkages, in 2020 OMEGA integrated the CEDS and the Comprehensive Long-Range Transportation Plan (LRTP) into a single report entitled Regional Transportation and Development Plan, *Mapping a Route Forward to a Strong and Resilient Region, 2020 – 2045* for the purpose of internal planning. This integration provides our region with a one-stop document containing all the regional demographic, development, and transportation related information. Viewing potential projects and developments from a holistic stance will amplify the magnitude of the effects on the region and pave the way for future related developments. Alignment with transportation planning objectives will allow regional planners to develop sensible strategies to tackle complex challenges. OMEGA will continue to submit the CEDS as a stand-alone document for EDA submission and public access but will be looking at all planning documents with an all-encompassing eye in order to best benefit the region.

The following is the list of holistic goals OMEGA has adopted for both the CEDS and the LRTP. In bold are the pieces that are specific to economic development and not transportation related, however neither can be fully achieved without the other.

### Goal 1: Preservation of Regional Assets

- **Facilitate communication between funding/regulatory agencies and political subdivisions**
- **Develop a prioritized list of infrastructure improvements based on current conditions/use**
- Advocate for the ability for local communities to enact Road Use Maintenance Agreements (RUMAs) for additional industrial uses
- Increase flexibility to implement weight restrictions on local roads
- **Provide current infrastructure condition data to locals via interactive web maps or ad hoc data requests**
- Support Transportation Performance Management Statewide Target for Pavement
- Support Transportation Performance Management Statewide Target for Bridge Condition

### Goal 2: Increase Safety of Regional Infrastructure

- Encourage communities to plan for safe use by all users of the transportation network, to include motorists, pedestrians, bicyclists, transit riders, and Amish buggies
- Plan for wider travel lanes to accommodate slow-moving vehicles are frequent (e.g. Amish buggies, bicyclists, agricultural equipment)
- Support the development of interconnected active transportation networks
- **Develop a regional list of dangerous intersections and road segments, updated annually**
- **Work with communities to develop access management plans for new and existing corridors**

- Support Transportation Performance Management Statewide Target for Safety

### Goal 3: Facilitate Economic & Community Development

- **Research and disseminate funding opportunities for communities; assist in applying for and administering funds, if requested**
- **Advocate for the expansion and improvement of rural broadband access, safe drinking water, and wastewater systems**
- **Advocate for the development of the regionally significant corridors (US 30 & Columbus-to- Pittsburgh Corridor)**
- **Support community efforts to revitalize, rehabilitate, or develop economic/recreational spaces**
- **Lead or assist in regional corridor planning**
- Develop short-term plans for communities to implement new programs (e.g. Safe Routes to School, Park Improvement Plans, etc.)
- **Support workforce development programs**
- Support Transportation Performance Management Statewide Target for Travel Time Reliability
- Support Transportation Performance Management Statewide Target for Truck Travel Time Reliability

### Goal 4: Develop & Maintain Regional Resiliency

- **Incorporate green infrastructure into the planning phases of projects to reduce environmental impacts from development (e.g. bioswales for improved drainage, permeable pavements in parking areas, etc.)**
- **Assist local governments in the development of access plans during extreme weather events, in coordination with local EMA directors**
- **Support area or site development efforts to diversify regional economies**
- **Facilitate educational opportunities for communities to learn/implement new strategies to make their local area resilient economically and physically**
- **Identify high-risk areas for extreme weather impacts**

The coronavirus pandemic brought to the forefront the importance of resiliency and diversity in our local economies. So much so that it earned the status of one of OMEGA's top four goals. The recent pandemic will not be the last of economic shocks and natural disasters we see in the region, making Emergency Management Agencies and hazard mitigation and recovery plans key for resiliency in the future. A diverse economy will also create prosperity by spurring innovation and generating flexibility. An economy that relies on multiple industries rather than a single industry will allow the region to stand a chance against economic downturns.

This summer, OMEGA conducted an online SWOT (Strengths, Weaknesses, Opportunities, and Threats) survey sent to OMEGA CEDS Committee members, employees, executive board,

members, and representatives of affiliated organizations. The following list is the results (top three per section) of the SWOT Survey that will be utilized when developing the updated strategy in the 2022 CEDS rewrite.

**Strengths:**

1. Sense of Community
2. Interstate or four-lane highway access
3. Local & Regional Economic Development

**Weaknesses:**

1. Broadband
2. Attracting Young Talent
3. Quality Housing

**Opportunities:**

1. Recreational Opportunities
2. Natural Resources
3. Low Cost of Living

**Threats:**

1. Substance Abuse
2. Reliable and Skilled Workforce
3. Aging Population

## SECTION 2: REPORT ON ECONOMIC DEVELOPMENT ACTIVITIES

As the recovery from the effects of the coronavirus pandemic continues, OMEGA has been hard at work making the sure our members are aware of the funds available and providing technical assistance when applicable.

With EDA's non-competitive CARES funding to local Economic Development Districts in 2020, OMEGA retained a Regional Economic Recovery Coordinator to aid in the coronavirus pandemic recovery as well as a consultant to perform a Broadband Feasibility Study due to the pandemic bringing the region's broadband infrastructure problem to the forefront.

The Montrose Group, LLC. is currently serving as OMEGA's Regional Economic Recovery Coordinator. Since kicking off the project in February 2021, the consultant has coordinated county-by-county meetings, meeting with local economic development professionals and others to discuss the most pressing issues each county is facing and how the Recovery Coordinator can help. Once the issue is identified, the consultant and OMEGA put together stakeholder groups to work together to address. Some examples of the types of work include creating a strategic plan update for Guernsey County, developing two business retention and expansion (BR&E) strategies for Carroll and Columbiana Counties, and developing a sustainable

approach to meet the demand for additional industrial space in the City of Salem for the Salem Sustainable Opportunity Development Center Inc. The Regional Economic Recovery Coordinator also helped create a business attraction strategy for a recently formed Joint Economic Development District, and a highest and best use analysis for the Regional Technology Park in Tuscarawas County.

Reid Consulting, LLC. was retained as OMEGA's consultant to conduct a broadband feasibility study for the entire region. The study kicked off in February 2021, and since then the consultant has completed an analysis of the incumbent Internet service providers (ISPs) and existing broadband infrastructure in the region, providing a clear picture of the state of broadband in the region and how any forthcoming network will fit in by identifying service models that could be utilized in the region. They have created GIS maps detailing the physical extent of fiber-optic lines, fixed wireless, service areas, incumbency, and level of service provided. These maps also provide the results of the 2020 FCC RDOF reverse auction. The FCC is still going through the due diligence process and has not officially awarded any projects in the OMEGA region.

The consultant has used this analysis to create detailed broadband profiles for each of the ten OMEGA counties that provide the most accurate picture of the current state of broadband in the region in an easy to read and comprehend format. These profiles can be found on OMEGA's website: <https://omegadistrict.org/regionalbroadband/> . The consultant is currently working to update the broadband profiles to include population and business density. Based upon this analysis, 78% of the populated area and 33% of the households in the OMEGA region do not have access to the minimum broadband speeds of 25 Mbps download and 3 Mbps upload. The Broadband Profile for the OMEGA region is provided in Attachment A. OMEGA and Reid Consulting conducted virtual meetings with each of our ten counties to review the results of the study and to initiate discussions on project priorities. Once these priority areas are identified, project costs and potential funding sources will be identified for both last mile and additional middle mile projects.

In January 2021, Ohio University's Voinovich School of Leadership and Public Affairs was awarded a \$2.2 million investment from EDA to accelerate the region's transition from a coal economy through a new initiative called Resilience Initiative for Southeastern and Eastern Ohio (RISE Ohio). RISE Ohio is a \$2.7 million, two-year program led by Ohio University's Voinovich School, in partnership with the Buckeye Hills Regional Council (BHRC) and OMEGA, focused on helping communities in the combined 18-county region make an economic transition to new industries and ensuring continued job creation, as well as economic growth and diversification. The new funding is providing these communities with an opportunity to engage in planning for development or investments in Opportunity Zones, along with providing Coshocton County with an Economic Recovery Coordinator to assist with the impact of the AEP coal-fired power plant closure in Conesville.

OMEGA retained Hamman Consulting Group to serve as the Coshocton County Recovery Coordinator and in conjunction with Buckeye Hills Regional Council retained the team of Steadfast City and Steadfast Advisory & Investment Services. to provide technical assistance with planning for developments and investments in Opportunity Zones

Under this grant, OMEGA also hired a Senior Development Specialist to lead this initiative for OMEGA. The Senior Development Specialist started in mid-August and will also be assisting with the activities under the Partnership Planning and CARES Act Planning grants.

In 2020, OMEGA worked with the Zanesville-Muskingum Port Authority (ZMCPA) to apply for approximately \$3.5 million from the EDA CARES Act program for the construction of a turn lane and a force main improvement project for the county's newest business park: The National Road Business Park. This is the fourth business park in the county owned by the ZMCPA. The existing parks employ over 4,000 people in total and are home to three Fortune 500 companies (Kellogg's, Dollar General, and Halliburton). With the help of OMEGA and OMEGA's Economic Recovery Coordinator Consultant, the Montrose Group, LLC., ZMCPA is currently working on reapplying for funding through the EDA American Rescue Plan Economic Adjustment Assistance Program. This addition and improvement to the National Road Business Park will provide easier access to the park while keeping traffic smooth as well as the proper infrastructure for prospective businesses. The resulting economic growth and job creation from this investment will aid Muskingum County's and the surrounding region's resiliency. The need for developable, marketable sites for business parks continues to be a high priority for the region. Due to the lack of sites for development, having end-users is not always possible before project funding as improved sites are needed to attract new businesses and enable existing businesses to expand. Businesses are cautious about committing to job creation and/or retention until sites are available. As unemployment rates continue to decline, many businesses and community leaders have expressed concern about meeting employment needs and are concerned about the lack of housing to attract new workers to the region.

OMEGA and Coshocton Port Authority are working towards creating the Coshocton Collaborative, a coworking and makers space that will also rehabilitate the currently vacant and historic Pastime Theater Building in the heart of downtown Coshocton. The building is three stories with a large basement and the plan is to house the Port Authority, the Small Business Development Center in the second floor for easy access for local entrepreneurs and makers utilizing the space. The Collaborative will be an all-encompassing stop that will foster creativity and innovation in both the young and the old and inspire people to explore the entrepreneurial spirit while also providing them with the resources necessary to achieve success. The closure of the American Electric Power (AEP) Plant in Conesville as well as the ongoing pandemic have adversely affected the already struggling county. Using average unemployment rates between 2013-2019, Coshocton County has had the second highest unemployment rates in the OMEGA region. This project will provide the foundation for a more diversified, sustainable, and resilient



economy leading to higher wages, lower unemployment, and lower poverty rates for the county and the region as a whole. OMEGA is working with the Port Authority on an application to the EDA American Rescue Plan Economic Adjustment Assistance Program for the design and construction of the Coshocton Collaborative

The Wilds is a non-profit safari park and conservation center located in Muskingum and Guernsey Counties on nearly 10,000 acres of reclaimed mine land. The facility is home to a wide variety of animal species living in open, natural habitats. The mission of The Wilds is “to lead and inspire by connecting people and wildlife.” With the support of Ohio Department of Natural Resources, The Wilds is planning to break ground for a campground on site in spring of 2022. The project ask is for the construction several water and wastewater improvements as well as some other needs to accompany the creation of the campground. This project is expected to create the equivalent of five full-time positions, and the campground is being designed with future development in mind. Due to its remote location and limited accommodation, a campground with both RV and primitive sites is anticipated to increase its annual visitors by 18,000 with a projected economic impact of almost \$1.7 million. These tourists will largely be traveling to the area using Interstates 70 and 77 and will support businesses and other tourist sites in the regional area as they make their way to The Wilds.

Belmont College in Belmont County is seeking to expand its current Industrial Trades offerings needed to train new and displaced workers in the region. This project involves building a new Industrial Trades Building, a CDL testing pad, and an Energy Efficient Lab. The goal of the project is to increase the number of students that can be trained and pipelined into the workforce with the additional capacity, anticipating approximately 150 additional students per year with the opportunity for growth. Belmont County has a location quotient of greater than 10 for both coal and oil and gas, meeting the criteria to be an energy community. Their Building Preservation/Restoration program that will be housed in the new building is one of only six programs like it in the nation. Its graduates have gone on to work on well-established historic buildings such as Montpelier, Fallingwater, and Graceland. In addition to the more unique programmatic offerings, Belmont College has several more traditional trades programs including HVAC and CDL, both with 100% placement rates for graduates, and Welding and Heavy Equipment Operators and Technicians with near 100% placement for graduates.

The Tuscarawas County Economic Development Corporation (TCEDC) and other partners are planning for the development of a 25,000-square-foot Advanced Manufacturing/Industrial Internet of Things (IIoT) Innovation Center of Excellence inside an existing warehouse that will be expanded to serve the regional manufacturing industry and its employees. The Center will provide hands-on, and distance-learning IIoT-based trainings and programs led by industry leader MAGNET (Manufacturing Advocacy and Growth Network), in a state-of-the-art research and education facility that accelerates capacity and growth goals for the industry and improves quality of life for employees, their families and communities. The TCEDC, with OMEGA’s



assistance is planning to apply to the EDA American Rescue Plan Economic Adjustment Assistance Program.

Three loans were closed in 2021 through several programs including the CARES Act RLF, EDA's traditional RLF, and USDA RBEG RLF. Kurz-Kasch Inc. is a plastic fabrication company in Newcomerstown, OH to assist in the financing of machinery/equipment for a new product line for Samsung. Kurz-Kasch Inc. leveraged \$572,977 from a Nexeer Capital loan to obtain a \$180,205.36 loan from OMEGA's EDA CARES RLF program. This investment is anticipated to result in the creation of five full-time jobs. Holy Moley Brewing Company, a nano brewery specializing in craft beers and wines under OBM Productions contributed \$58,748 in private investment and leveraged \$125,000 in Appalachian Growth Capital loan funds to obtain \$125,000 in OMEGA's USDA RBEG RLF dollars that will result in the creation of three full time jobs.

One of the most complex loans in OMEGA's RLF history was issued to Mountaineer Products Inc. dba MPR Supply Chain Solutions located in Belmont County, for \$550,000.00. MPR is a multi-modal transloading company serving many industries with offloading services including truck, rail, and storage capabilities. Their unique location along the Ohio River features 220+ acres, two docks to service bulk cargo from barges, and the capability to upload cargo safely and quickly as well as provide storage for cargo. MPR is utilizing the loan funds for the acquisition of adjacent properties for the expansion of their business capabilities. Other organizations such as JobsOhio, Appalachian Growth Capital (CDFI), and the Ohio Rail Commission all recognized the importance of expanding this transloading facility to meet the demands of energy and other sectors by contributing grants and loans to the total project cost of almost \$7 million for this expansion project. MPR will be well positioned when PPT Global Chemical announces their final investment decision on the major petrochemical complex in Belmont County to be located south of the MPR facility. This investment in MPR is anticipated to create 11 full-time jobs. Not only are the RLF funds being used to create well-paying jobs, but these funds are also fostering economic growth within OMEGA's ten-county region, which is vital at this time in our collective pandemic recovery and ongoing resiliency efforts.

In March 2021, ARC awarded a \$281,603 Advanced Welding grant to Belmont College to implement the Eastern Ohio Appalachia Pipe Welding and Fabrication Project. The college will work with its partners, Eastern Gateway Community College and Mideast Career and Technology Center to purchase equipment to train 121 students and 30 workers/trainees in specialized welding skills required for the oil and gas industry and combined cycle power plants over three years.

In August 2021, the Development District Association of Appalachia (DDAA) approved the OMEGA application for participation in the second cohort of the Recovery to Work Cohort Learning Academy. This eight-month program will provide technical assistance and training for

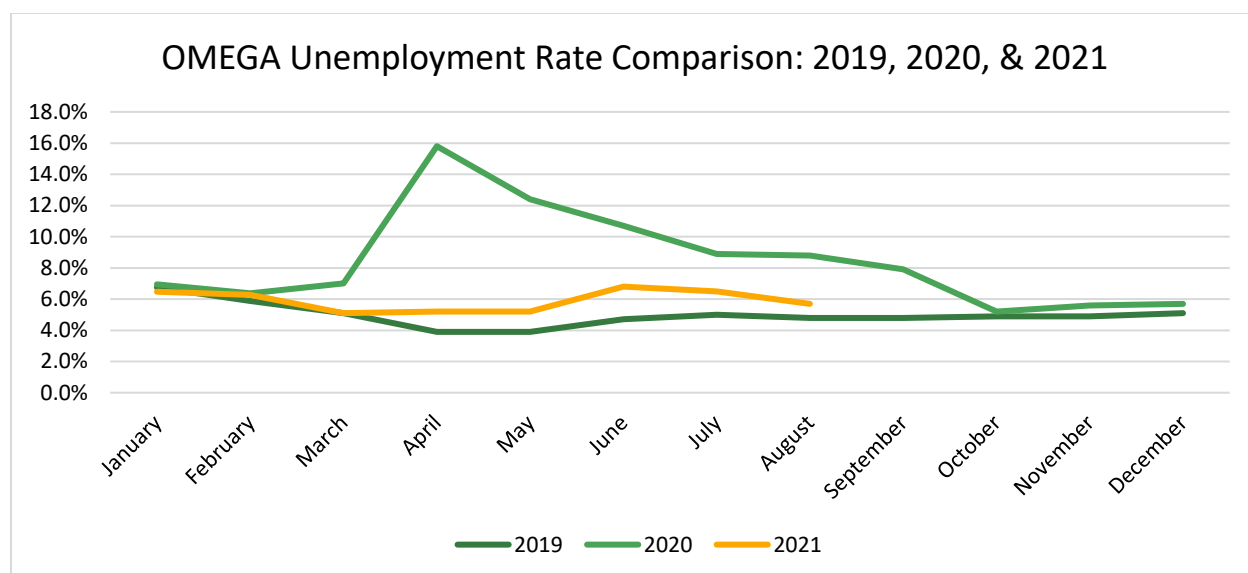
OMEGA staff and twelve members of the Core and Home Teams selected to coordinate and improve the Recovery to Work Ecosystem in the OMEGA District. OMEGA will work with Recovery Services Providers, Job Trainers, and Economic Development Agencies to ensure that persons recovering from substance use disorder (SUD) can be provided with in-demand skills necessary to be hired by “Recovery-Friendly” Businesses, who will be recruited to bolster this effort.

In September 2021, ARC awarded a \$980,374 POWER Grant to Urban Mission Ministries in Steubenville, Ohio for the Fresh Start Workforce Development Program. The Urban Mission will use the grant and leverage funds, including a \$250,000 grant from the Ohio Governor’s Office of Appalachia, to make renovations to a former grocery store to house their job training and recovery to work activities. Working with partners, Eastern Gateway Community College and West Virginia Northern Community College, the Urban Mission’s project will create three new businesses and ten jobs, retain 23 jobs, and improve 20 businesses and 350 trainees over three years.

In September 2021, ARC awarded a \$445,158 POWER Grant to Belmont College to implement their Heating, Ventilation and Air Conditioning (HVAC) Training Project. The college will work with their partner, the Belmont County Drug Court to train persons recovering from SUD in HVAC skills, in-demand in the Belmont County area. The purchase of equipment and construction of a pole building will allow the college to expand their HVAC Training program and train up to 50 students per year for three years.

In September 2021, the US Department of Labor awarded a \$970,227 WORC grant to Muskingum University in New Concord, Ohio to implement their Building Healthcare Pathways in Rural Appalachian Ohio to train up to 900 persons over three years in the nursing and healthcare related fields, with 300 participants expected to gain new or improved employment opportunities. The University will work with its partners, Zane State College, Central Ohio Technical College and Mid-East Career and Technology Center to provide the training for area hospitals, including the new Genesis Hospital to be constructed in Coshocton County.

Despite the coronavirus pandemic still raging through the world, the OMEGA region is faring well in terms of unemployment. Unemployment rates are almost down to pre-pandemic levels as pictured in the graph below. With these lower unemployment rates, the OMEGA region is facing a new issue: labor shortages. Across the region and across a variety of industries, employer after employer is complaining about the lack of workers and how difficult it is to hire right now. Numerous businesses have hosted job fairs with few participants and other businesses have expressed concerns about workforce reliability. As the region navigates this new issue, OMEGA is listening and learning and hopes to help address the problem in the coming months.



To address these workforce concerns and to help the region develop a more reliable and skilled workforce is a key strategy for the region, OMEGA's Appalachian Regional Commission (ARC) Program Manager has been working with colleges, universities, and other agencies to procure grant funding for several worthwhile workforce initiatives. Many of these grants were recently awarded to Belmont College, Urban Mission Ministries, and Muskingum University.

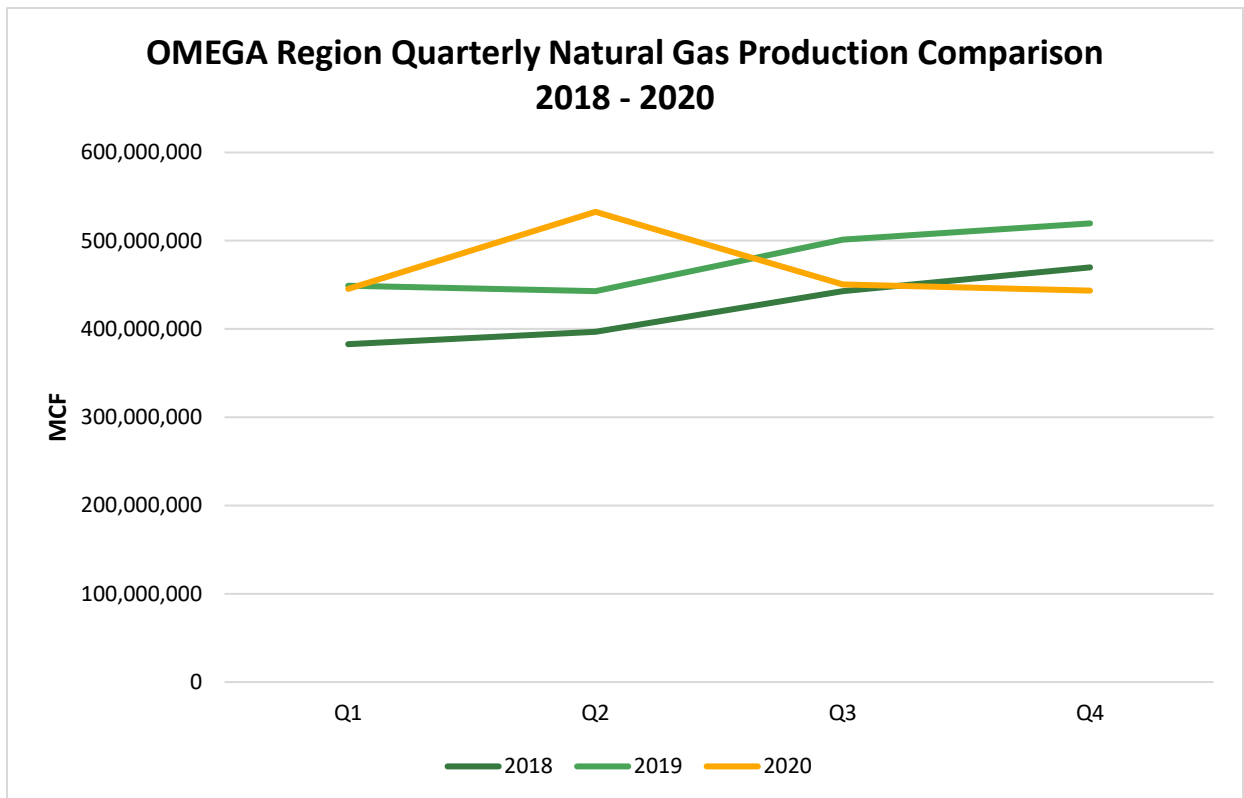
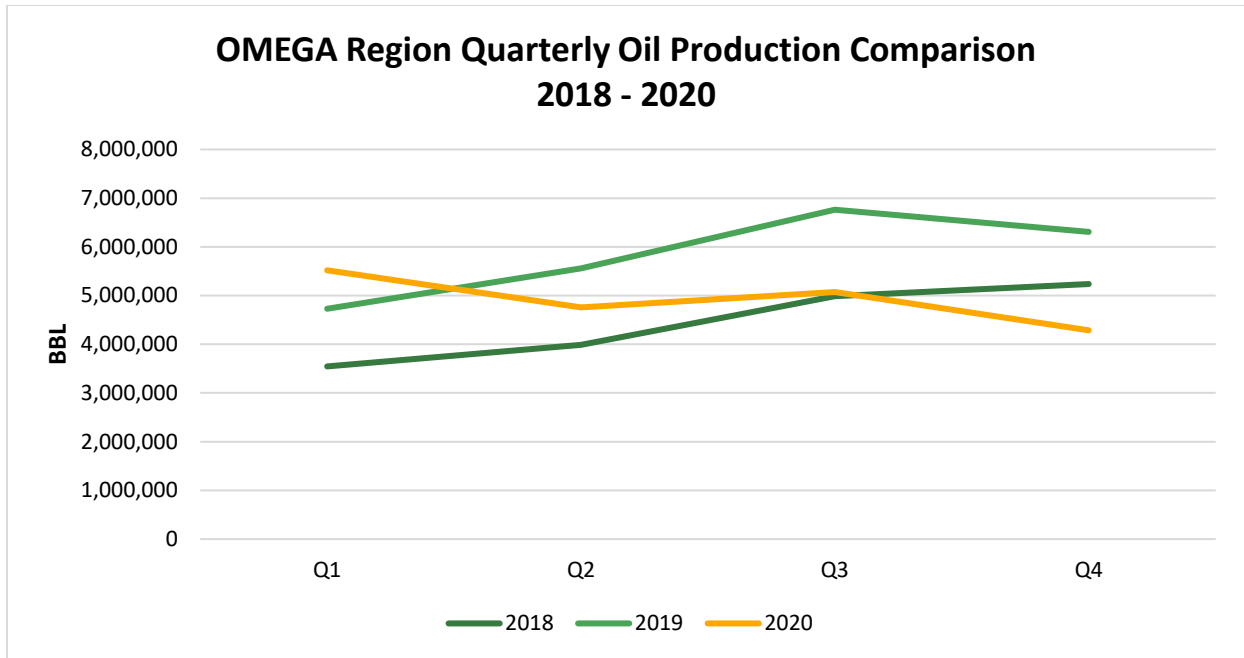
Another concern expressed by local economic development professionals is the need for affordable quality housing throughout the region. As the need for a skilled and reliable workforce continues to grow, the need for quality housing is becoming more crucial. Without quality housing, employers will have difficulty attracting the skilled workforce that they need to grow our economy. Many houses in the region are vacant and in such a state of disrepair that are not suitable for occupancy.

The OMEGA Region is still the leading producer of natural gas and oil in Ohio and accounts for over 91% of the oil produced in Ohio and over 80% of the natural gas produced in Ohio. So far, 2019 has been the peak of oil and natural gas production in the OMEGA region. In 2020, oil production was down 15% from 2019, but only down 2% in natural gas production. However, compared to 2018 both oil and natural gas production were up by over 10% in 2020.

2020 Total Production								
County	Oil				Natural Gas			
	BBL	% of State Total	% Δ from 2018	% Δ from 2019	MCF	% of State Total	% Δ from 2018	% Δ from 2019
Belmont	545,404	2.50%	1294.54%	-24.00%	923,610,698	39.70%	-3.29%	-1.00%
Carroll	2,010,656	9.40%	-45.35%	-20.38%	83,821,786	3.60%	-29.83%	-14.92%
Columbiana	29,157	0.10%	-33.21%	-15.26%	36,253,754	1.56%	9.10%	-11.18%
Coshocton	0	0.00%	-100.00%	-100.00%	27,961	0.00%	6.51%	15.93%
Guernsey	9,701,357	45.30%	-0.49%	-28.44%	80,811,096	3.47%	12.37%	-11.27%
Harrison	7,334,873	34.30%	73.70%	13.26%	262,726,059	11.29%	64.93%	21.95%
Holmes	0	0.00%	0.00%	0.00%	0	0.00%	0.00%	0.00%
Jefferson	0	0.00%	-100.00%	-100.00%	484,550,351	20.83%	37.48%	-9.19%
Muskingum	835	0.00%	13.61%	2.45%	39,330	0.00%	14.79%	-3.28%
Tuscarawas	16,422	0.10%	-35.74%	-45.91%	340,312	0.01%	-1.78%	-20.43%
<b>OMEGA Total</b>	<b>19,638,704</b>	<b>91.70%</b>	<b>10.58%</b>	<b>-15.86%</b>	<b>1,872,181,347</b>	<b>80.47%</b>	<b>10.66%</b>	<b>-2.13%</b>
Ohio Total	21,408,629	100.00%	8.20%	-14.03%	2,326,539,653	100%	-1.20%	-9.65%

The charts below demonstrate the oil and natural gas production by quarter through the years 2018 to 2020. Understandably and presumably due to COVID-19, both oil and natural gas production went down in 2020 compared to 2019. 2019 production was dramatically higher than 2018, and to start 2020 Q1 was on par with 2019 Q1 in natural gas and well above 2019 Q1 in oil. In 2020 Q2, natural gas surpassed 2019 Q2 before dropping to 2018 levels for the last two quarters. After oil's strong 2020 Q1 start, it dropped below 2019 and down and even lower than 2018 production levels for the final quarter of the year. Despite some of the dips in quarters, overall, 2020's production of both oil and natural gas surpassed 2018's by over 10% in each.

With the 2021 combined production data we will obtain next year, we will be able to do a deeper analysis of the trends in both oil and natural gas production.



The Guernsey Power Station in Guernsey County is projected to have a transformative effect on the area's economy, with at least half of the anticipated annual plant maintenance budget of \$20 million to be spent locally. During the construction period, the projected economic impact includes over 3,000 annual jobs, \$33.8 million in state and local tax revenue, \$450 million in

associated labor income, \$952.8 in output, and \$586.2 million in gross state product. The plant will be comprised of three single-shaft combined-cycle generating units housed in three separate turbine buildings. Each unit will have a generating capacity of more than 600 megawatts (MW) totaling over 1,800 MW. The plant is anticipated to open for a “soft start” in Spring of 2022 and be fully operation by the end of 2022. South Field Energy is a 1,180 MW combined-cycle power plant in Columbiana County that became operational in September 2021.

On August 19, 2021, Western Magnesium Corporation announced that Harrison County, Ohio will be the site of the first full scale deployment of their proprietary, eco-friendly magnesium extraction technology in the United States and is expected to have a substantial effect on the county and the region. The cost to build the plant is around \$1 billion and more than 200 permanent, well-paying jobs are projected to be created. The site is adjacent to the planned Harrison Energy Center, a 1,085 MW power plant planned, construction of which is pending which was a key component in the company’s decision to locate in Harrison County. Other factors included the proximity to a dolomite supply and availability of rail and highway for transporting the finished product to industries across the United States. Magnesium is a strategic commodity prized for its strength and light weight.

Due to the pandemic, PTT Global Chemical America has postponed its final investment decision regarding the ethane-cracker plant planned for Dilles Bottom in Belmont County. One investor, Daelim Chemical USA, withdrew from the project in 2020. A final investment decision will not be announced until the effects of the pandemic on the global economy are clear. However, all environmental permits have been obtained and the needed property acquired.

Running from Pennsylvania to Illinois, the Ohio River is an incredible resource for commerce in our region. So much so, that the value and tonnage of commodities and raw materials shipped on the Ohio River is higher than Lake Erie. The river flows south alongside three of the counties in the OMEGA region: Columbiana, Jefferson, and Belmont. The Wellsville Intermodal Facility along the river in Columbiana County is the last publicly owned deep-water port in Ohio, owned by the Port Authority. Additionally, Mountaineer Products (MPR) on the Ohio River in Belmont County expanded its trans-loading operation using a combination of CARES Act RLF (\$350,000), the EDA RLF (\$144,007), and the OMEGA RLF for funding. This project was in collaboration with partners JobsOhio, Ohio Rail Development Commission, and the Appalachian Growth Capital Fund. The Ohio River is critical now more than ever due to the growing petrochemical and energy industries in the region; however, the locks, dams, and ports are all aging and require improvement to meet demand.

OMEGA worked with other regional agencies, and ODOT to designate the section of the Ohio River from the Ohio/Pennsylvania state line in Columbiana County to the border of Gallia and Meigs County in Ohio as the Mid-Ohio River Valley Statistical Port to enhance the data

collection by the US Army Corps of Engineers. This new statistical port allows for detailed data collection of cargo that originates, terminates, and passes through the region between the current Ports of Pittsburgh and Huntington Tri-State. This data is crucial in advocating for infrastructure improvements along this stretch of the river and can also be used as an economic development tool by businesses and communities in the area.

This year OMEGA had a fantastic line up of speakers who presented at our Executive Board Meetings. Cara Dingus Brook, the President and CEO of the Foundation for Appalachian Ohio, kicked off the year and served as the keynote speaker for the virtually held February Executive Board Meeting. For the virtually held Annual Membership Meeting in March, Lieutenant Governor Jon Husted served as keynote speaker via pre-recorded remarks with Peter Voderberg, Director of BroadbandOhio, in attendance to answer questions. Sue Marzono, AEP Energy Efficiency Program Coordinator, spoke about electrification of vehicles for our virtually held Executive Board Meeting in May. Our first in-person Executive Board meeting since February 2020 was held in June of this year. Social distancing measures were in place to ensure a high standard of health and safety. Tom Reid, of Reid Consulting Group – the broadband consultant OMEGA retained through the non-competitive CARES funding to complete our Broadband Feasibility Study, served as our speaker for this exciting meeting. Our August Legislative Mixer was held at The Wilds in Muskingum County in an outdoor pavilion where we had several legislators speak including U.S. Congressman Bill Johnson, Senator Tim Schaffer, Senator Jay Hottinger, Representative Adam Holmes, Representative Darrell Kick, and Representative Don Jones. Our most recent Executive Board Meeting, held in September, was our Semi-Annual Membership Meeting where Jamie Baier Grant of the Montrose Group, LLC. – OMEGA’s consultant Recovery Coordinator – gave an update on their work in the region and representatives from The Foundation for Appalachian Ohio introduced a new “Welcome Home Scholarship Fund” to incentivize residents to return to their Appalachian Ohio hometowns.

### SECTION 3: EVALUATION OF PROGRESS ON ACTION PLAN AND GOALS

Three tools that OMEGA utilizes to measure progress on their goals and action plan include the OMEGA Profile, the CEDS Scorecard, and the grant record.

The OMEGA Profile is in its second year and is updated yearly in the fall. The profile provides an easy to process snapshot of the OMEGA region full of demographic and economic data for both our members and the public to use. The OMEGA Profile can be found at the end of this document, Attachment B. The data released from the 2020 Census provided OMEGA with an up to date and more accurate depiction of the population of the region. Between 2010 and 2020, the population of the region declined by 2.9%. Of the ten counties, only three (Holmes, Muskingum, and Tuscarawas) experienced growth. Holmes County led the region with a 4.4%



increase in population and the county to suffer the most was Harrison County, with an 8.7% loss in population.

According to JobsEQ Industry Snapshot tool, the top industry sector in the OMEGA region is Manufacturing (NAICS: 31) employing over 33,000 in the region. The location quotient for manufacturing in the OMEGA region is 1.92. The other industries in the top five (excluding healthcare and education) include, in order: Retail Trade (NAICS: 44, employs over 26,000), Accommodation and Food Services (NAICS: 72, employs over 17,000) Construction (NAICS: 23, employs over 13,000), and Transportation and Warehousing (NAICS: 48, employs over 10,000).

As stated in the following grant record, OMEGA provided grant writing assistance to several communities resulting in **over \$9.2 million** in funding for the region between October 2020 and September 2021 including approximately \$2.7 million for workforce development initiatives.

**OMEGA GRANT RECORD**  
**OCTOBER 1, 2020 TO SEPTEMBER 30, 2021**

Applicant	Project	Funding Agency	Grant/Loan	Total Project Cost	Status
Adena	Blairmont Road (CR 6) Landslide Repair (Resubmittal)	OPWC	\$ 21,090	\$ 273,619	Approved
Belmont College	Eastern Ohio Appalachia Pipe Welding & Fabrication	ARC Advanced Welding Grant	\$ 281,603	\$ 425,603	Approved
Belmont College	Heating, Ventilation and Air-Conditioning (HVAC) Training	ARC POWER	\$ 445,158	\$ 748,758	Approved
Bethesda	Epworth Park Ball Field Fence Project	ODNR NatureWorks	\$ 31,970	\$ 42,725	Pending
Bethesda	2nd Street Sanitary Sewer Improvement	ODOD Water & Wastewater (HB 168)	\$ 177,900	\$ 192,900	Pending
Bethesda	Virginia Street Sanitary Sewer Improvement	ODOD Water & Wastewater (HB 168)	\$ 189,540	\$ 204,540	Pending
Byesville	Body Camera Grant	OCJS	\$ 2,344	\$ 2,344	Pending
Byesville	Playground Swingset Purchase	ODNR NatureWorks	\$ 2,855	\$ 3,807	Pending
Cadiz	US 250/SR 9 Sidewalk Project	ODOT TAP	\$ 616,462	\$ 733,190	Approved
Carroll County	Golden Age Retreat - HVAC Improvements	ODOD CDBG Targets of Opportunity	\$ 1,011,200	\$ 1,011,200	Approved
Carrollton	Playground Equipment Assembly	ODNR NatureWorks	\$ 25,023	\$ 33,364	Pending
Carrollton	SR 332 Sidewalk Improvements	ODOT SRTS	\$ 400,000	\$ 776,250	Approved
Clark Twp (HOL)	Safety Sign Upgrade	ODOT Township Sign	\$ 11,828	\$ 11,828	Approved
Columbiana County TID	Beaver Local Schools Safe Crosswalk	ODOT TAP	\$ 80,883	\$ 98,140	Not Approved
Coshocton, City	Warsaw Waterline Extension Project	ODOD Water & Wastewater (HB 168)	\$ 5,000,000	\$ 9,333,000	Pending
Coshocton, City	Three Million Gallon Water Reservoir	ODOD Water & Wastewater (HB 168)	\$ 4,292,000	\$ 4,642,000	Pending
Cumberland	Cumberland Village Park Mulch Project	ODNR NatureWorks	\$ 16,726	\$ 22,302	Pending
Franklin Twp (COS)	Safety Sign Upgrade	ODOT Township Sign	\$ 12,298	\$ 12,298	Approved
Harrison County	Harrisville WWTP Improvements	CDBG Critical Infrastructure	\$ 437,900	\$ 587,900	Approved
Harrison County	Scio WWTP Improvements	CDBG Critical Infrastructure	\$ 489,100	\$ 543,530	Approved
Lafayette Twp (COS)	Safety Sign Upgrade	ODOT Township Sign	\$ 9,060	\$ 9,060	Approved
Muskingum University	Building Healthcare Pathways in Rural Appalachian Ohio	Dept. of Labor WORC	\$ 970,227	\$ 1,399,883	Approved
New Philadelphia	Kent State Connector Trail	ODNR	\$ 500,000	\$ 969,400	Pending
Newcomerstown	Miskimen Drive Sidewalk Improvements	ODOT SRTS	\$ 89,401	\$ 89,401	Approved
OMEGA	Brownfields Coalition Assessment	US EPA	\$ 600,000	\$ 600,000	Not Approved
OMEGA, Buckeye Hills, OU*	Project Rise Ohio	EDA	\$ 2,200,000	\$ 2,750,000	Approved
Salem Twp (TUS)	Safety Sign Upgrade	ODOT Township Sign	\$ 10,834	\$ 10,834	Approved
Steubenville	University Blvd District	EDA	\$ 1,569,353	\$ 1,961,691	Not Approved
Strasburg	Wooster Avenue Water Line Project	OWDA	\$ 830,300	\$ 830,300	Approved
The Wilds	Conservation and Ecotourism as a Catalyst/Entrepreneurship	ARC POWER	\$ 1,500,000	\$ 3,178,695	Not Approved
Tiltonsville	Cruiser Purchase - JAG	OCJS	\$ 77,724	\$ 77,724	Pending
Tiltonsville	Cruiser Purchase - JAG LE	OCJS	\$ 20,000	\$ 20,000	Pending
Union Township (BEL)	Barkcamp Road	OPWC	\$ 420,485	\$ 311,159	Approved
Urban Mission Ministries	Fresh Start Workforce Development Program	ARC POWER	\$ 980,374	\$ 2,306,434	Approved
ZMCPA	National Road Business Park	EDA	\$ 3,464,864	\$ 4,331,080	Not Approved
<b>TOTAL</b>			<b>\$ 26,788,502</b>	<b>\$ 38,544,959</b>	
<b>TOTAL APPROVED</b>					<b>\$ 9,237,320</b>

\*Application submitted prior to October 1, 2020, but status known after October 1, 2020.

The following Score Card is the evaluation system OMEGA has developed to determine if goals are being met and progress is being made. Overtime, it will be evident if progress is being made if unemployment and poverty rates go down and if education attainment rates, Median Household Income, population, etc. increase. With OMEGA's CEDS's rewrite, the evaluation system will be redeveloped.

Due to the effects of the COVID-19 pandemic, the benchmarks chosen for the scorecard did not all improve as hoped. We hope to see higher numbers in 2021 as our region continues to recover, and our economic recovery efforts continue to materialize.

CEDS Evaluation Framework				
Indicators of Regional Progress				
	Achieved	On Target	Missed	In Process
Reduce Regional Unemployment			✓	
Increase Regional Income			✓	
Reduce Regional Poverty				✓
Improve Regional Standard of Living				✓
OMEGA District Indicator Evaluation				
	2019		2020	
Unemployment Rate	5.00%		8.40%	
Median Household Income	\$48,837		\$47,384	
Poverty Rate (All persons)	14.80%		11.10%	
Population Changes	573,805 (ACS estimate)		573,773 (2020 Census)	
Education Attainment Rate (HS/Assoc/Bachelor and higher)	85.81%/9.14%/14.18%		85.79%/9.16%/14.55%	
Affordable Housing (% of income as rent/specific owner costs)	27.04%/19.16%		26.1%/19.0%	
Change in Access and Demand for Social and Medical Services (Transfer payments(B)/% of residents insured)	\$5.86B/90.65%		\$5.97B/90.0%	
Number of Manufacturing Establishments/Avg. Weekly Wage	1,023/*\$1004		1,028/\$1,045	
OMEGA project participation:				
Number of households Benefiting from a Project	79,496		25,390	
Number of Jobs Created/Retained in the Region	453		125	
Miles of Roadway Constructed or Improved	1.93		1.30	
Linear Feet of Water or Sewer Line Installed or Improved	186,912		95,568	
Leveraged Funds	\$36M		\$36.8M	
*Excludes Belmont County; average weekly wage information not available for Belmont County				

## SECTION 4: SCHEDULE OF GOALS FOR THE NEXT YEAR (2022)

In the upcoming year, OMEGA will continue to be busy with the coronavirus recovery effort, the administering of the EDA CARES Act non-competitive grant to include completion of the Regional Broadband Feasibility Study and RISE grant award, and other economic development activities. OMEGA will continue to provide communities with grant writing assistance for a variety of programs including EDA programs as well as provide programmatic outreach for the Abandoned Mine Land (AML) and Revolving Loan Fund (RLF) programs. AML poses as a serious threat in the OMEGA region to both safety and economic development. OMEGA will assist communities with procuring funding assistance for the remediation of AML so that site development costs are competitive with other regions.

OMEGA will continue to administer the RLF to support private, for-profit small businesses throughout the region. Through the OMEGA RLF program, businesses may be eligible for a fixed rate, low-interest loan to assist in the startup, purchase, or expansion of a business.

Resiliency is fundamental for the continued growth and success of the OMEGA region. OMEGA will work with communities to incorporate resiliency in economic, community, and transportation planning projects. To mitigate adverse impacts, OMEGA will help communities plan for and/or mitigate economic downturns, extreme weather events, and other external factors that may impact the region. OMEGA will be utilizing two approaches in the resiliency effort this year. Steady state approaches to economic resilience focus on the long-term planning efforts designed to avoid or mitigate major disruptions to the economy. These approaches may include aligning regional plans with other planning efforts, such as hazard mitigation plans. Efforts to grow and diversify the region's economic and employment base will help ensure timely recovery to both economic and natural disasters. Responsive approaches to economic resiliency focus on short or immediate planning efforts designed to initiate recovery from a major disruption. To prepare the region for extreme weather events and the effects of climate change, the OMEGA Regional Transportation Planning Organization, in conjunction with other planning partners must conduct assessments to understand the vulnerability of regional transportation systems to the impacts of climate change and extreme weather.

OMEGA plans to conduct quarterly meetings with the CEDS committee to discuss the development of CEDS in 2022. The OMEGA Profile will be updated annually in the fall. Ongoing updates include an Energy and Petrochemical update and a Real GDP update. OMEGA's Grant Record will be updated semi-annually, in April and October. OMEGA will continue to participate in planning the State of the Region conference put on in collaboration with The Voinovich School at Ohio University, Buckeye Hills Regional Council, Eastgate Regional Council of Governments, and Ohio Valley Regional Development Commission. OMEGA will conduct seven Executive Board meetings in 2022 and each of these meetings will include a speaker who will

discuss relevant issues related to economic and community development as well as other topics of interest to our members.

OMEGA will continue to adhere to EDA's requirements under the Government Performance and Results Act when submitting upcoming Specific Award Conditions.

# **Attachment A**



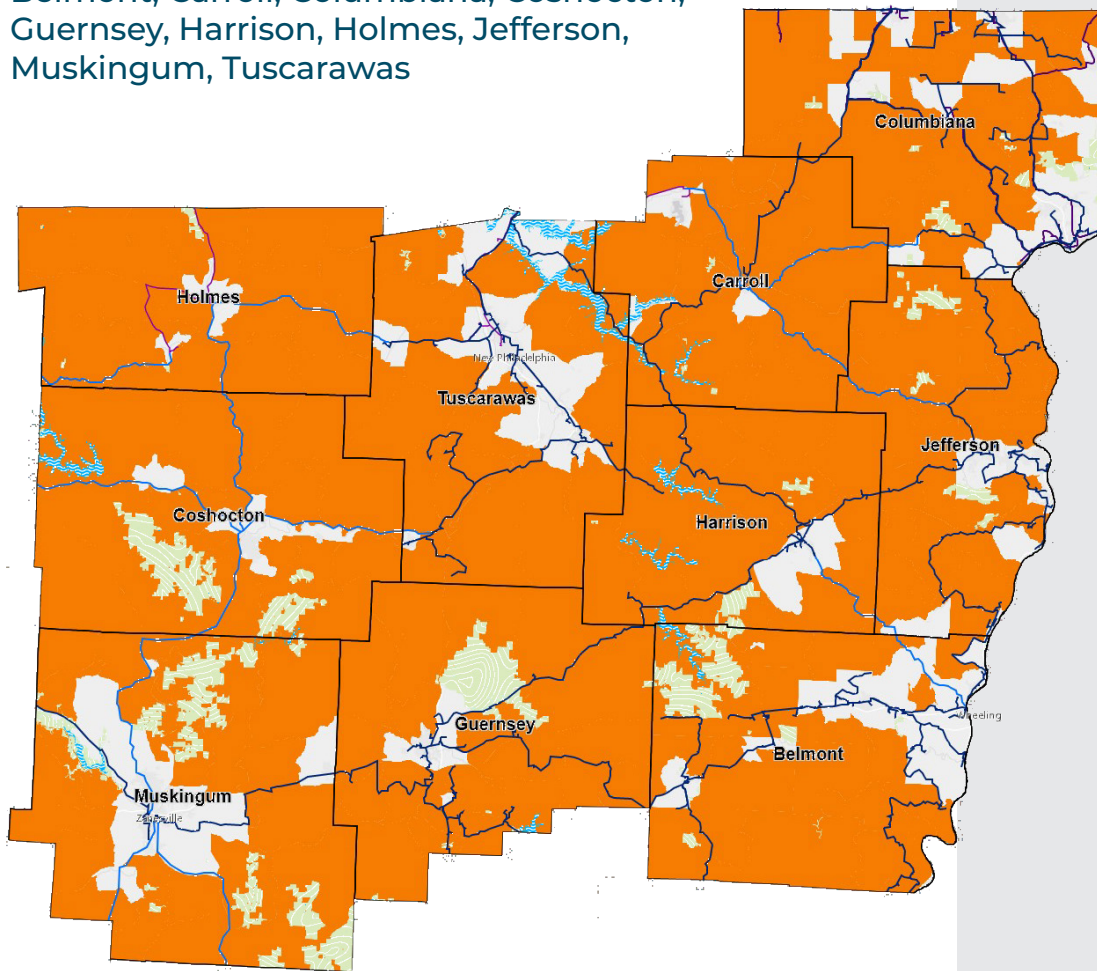
# OUR DEVELOPMENT DISTRICT

..... the big picture

**78% & 33%**  
of the populated area of households

**DO NOT HAVE ACCESS TO MINIMUM 25/3 Mbps**

The district served by the Ohio Mid-Eastern Government Association spans 10 counties:  
Belmont, Carroll, Columbiana, Coshocton,  
Guernsey, Harrison, Holmes, Jefferson,  
Muskingum, Tuscarawas



the district has .....

**4,718 mi<sup>2</sup>**  
of populated area

➔ **3,663 mi<sup>2</sup>**  
are unserved

0-10 Mbps: **58%**  
10-25 Mbps: **20%**

\*no data for 3.3% of area

**276,115**  
households

➔ **85,616**  
are unserved

0-10 Mbps: **18%**  
10-25 Mbps: **14%**

\*no data for 26% of households



**contact**  
**omegadistrict.org**  
**740-439-4471**



Connecting Appalachia



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# OUR METHODOLOGY

..... breaking down the data

## Regional Broadband Availability Map Methodology

### About This Map

This map was created under contract by Reid Consulting Group, LLC. for Ohio Mid-Eastern Government Association (OMEGA). This map, collectively with county maps created for Buckeye Hills Regional Commission (BHRC) and Ohio Valley Regional Development Commission (OVRDC) are being provided to Connecting Appalachia. Connecting Appalachia is a consortium of local governments, regional economic development councils, and industry professionals working to increase economic opportunity for Appalachia by expanding access to quality, affordable broadband. Broadband availability is displayed at the Census Block Group level.

This project was funded in part by the *I'm a Child of Appalachia Fund* of the Foundation for Appalachian Ohio through the Buckeye Hills Foundation.

### Methodology

Coverage ratings are derived from Ookla Speedtest Intelligence® data licensed by InnovateOhio from the State of Ohio for the months of February 2020 through May 2021. Ratings are color coded based on median calculated speed tiers (i.e., download/upload speeds): Below 10/1Mbps is deep red; at least 10/1Mbps and less than 25/3Mbps is orange; at least 25/3Mbps and less than 50/10Mbps is yellow; at least 50/10Mbps and less than 100/20 Mbps is light green; and above 100/20Mbps is bright green.

Where possible, areas with no Ookla data have been assigned an extrapolated rating based on comparative analysis of population density, FCC Form 477 data, and RDOF Phase 1 auction award maps. Extrapolation is effective at low population densities but becomes less accurate as density increases. Areas that cannot be assigned an extrapolated rating are shown in white on the map. To protect consumer privacy, Ookla limits location precision to 100 meters by 100 meters. As a result, a single location may include multiple households and many individual tests. All speed tests within a 100 meter radius were averaged to generate an overall speed by location. Census block ratings were derived by taking the median of all location averages within each block. The following filters were applied to the Ookla data before ratings were calculated:

- Only fixed broadband sources (Cable, DSL, fixed wireless) were included. 3G/LTE/5G mobile data connections were excluded, as were satellite providers.
- Test results with high first-hop latency were excluded to limit the 'skewing' effects of misconfigured wi-fi routers, interference from unshielded household devices, and low wi-fi signal strength.

### Reference Layers

The map includes LBRS address data from the State of Ohio. Block Group, Census Block Group and Block boundaries are taken from the 2010 U.S. Census.

### Disclaimer

This map is presented "as is" for informational purposes. Reid Consulting Group does not warrant the accuracy, adequacy or completeness of this information and expressly disclaims liability for any errors or omissions. For More Information To learn more about rural broadband issues in Ohio or to request additional information about how this map was developed visit: [connectingappalachia.org](http://connectingappalachia.org).



Connecting Appalachia



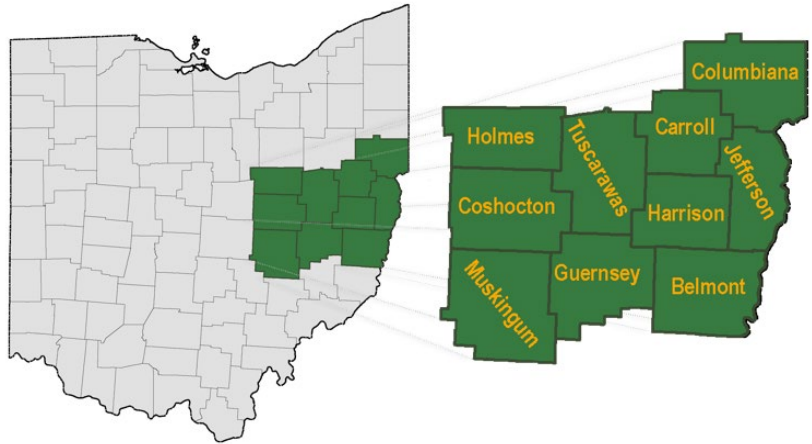
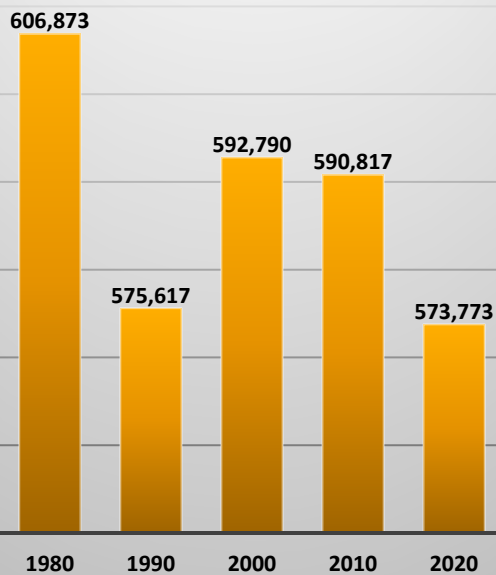
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# **Attachment B**





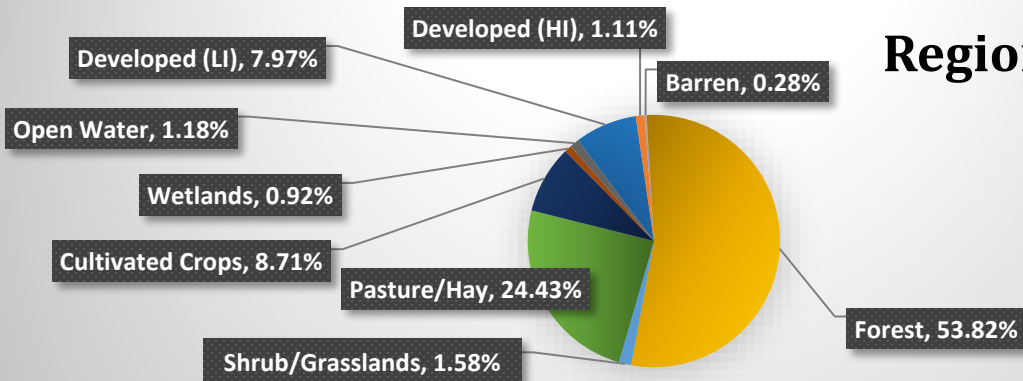
**Over the Years:  
Population of the  
Region**



**Largest Places**

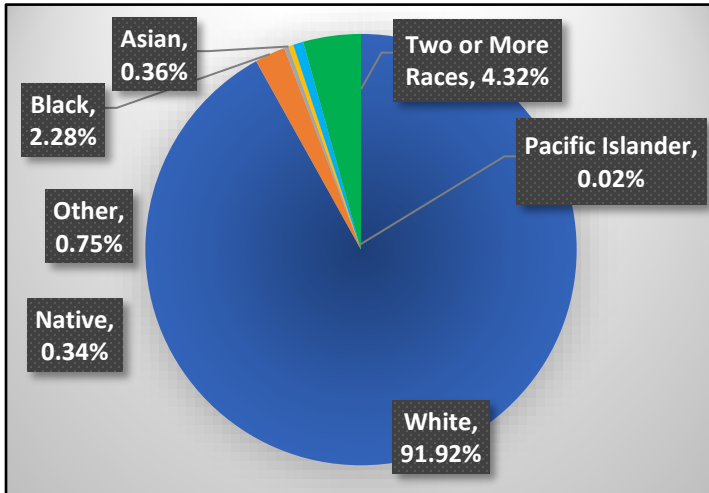
	2020 Census	2010 Census
Zanesville (Muskingum)	24,765	25,487
Steubenville (Jefferson)	18,161	18,659
New Philadelphia (Tuscarawas)	17,677	17,288
Dover (Tuscarawas)	13,112	12,826
Salem (Columbiana)	11,915	12,299

**Regional Land Use**

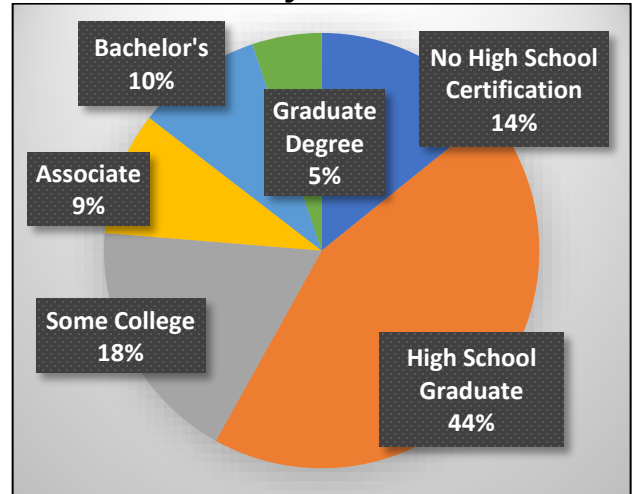


# Population...

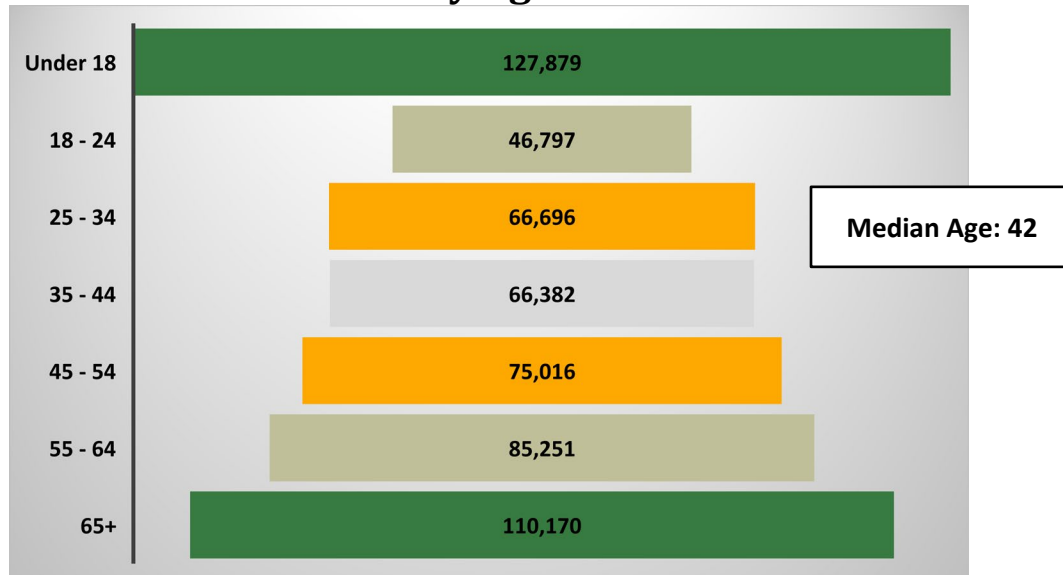
by Race



by Education Level

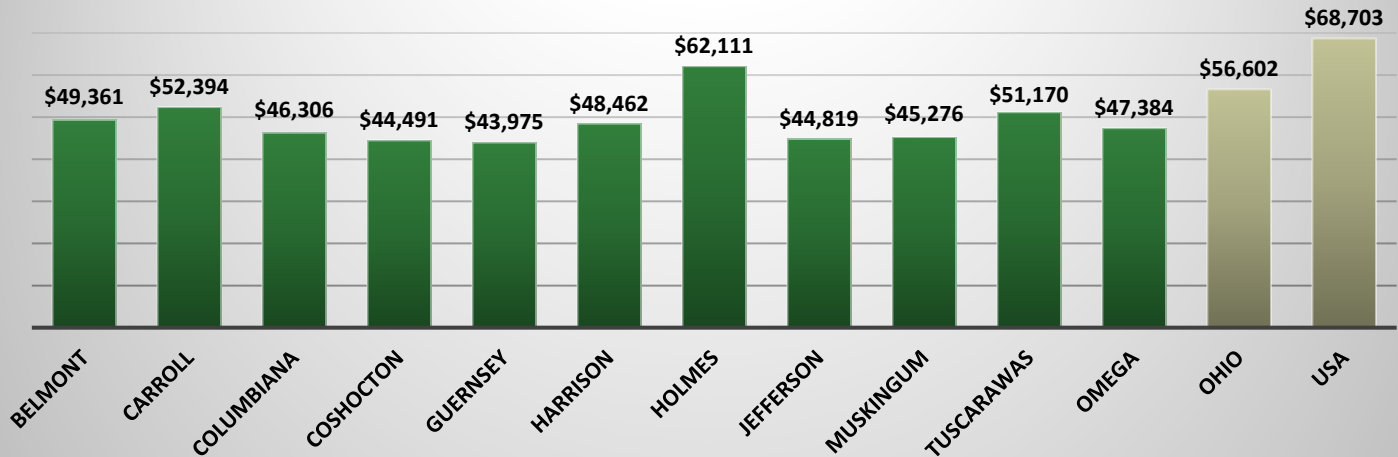


by Age



# Finance

## Median Household Income

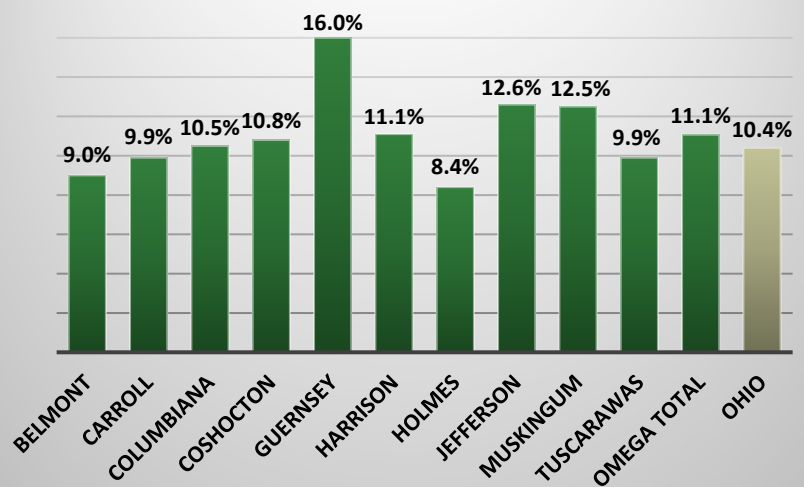


<b>Total Transfer Payments</b>	<b>\$5,972,160,000</b>
<b>Payments to Individuals</b>	<b>\$5,477,585,000</b>
Retirement & Disability	\$2,100,711,000
Medical Payments	\$2,556,104,000
Income Maintenance	\$443,434,000
Unemployment	\$45,257,000
Veterans Benefits	\$174,854,000
Federal Education & Training Assistance	\$102,238,000
Other	\$44,987,000

## Taxes

<b>Taxable Value of Real Property</b>	<b>\$11,573,823,990</b>
Residential	\$6,856,634,340
Agriculture	\$1,832,796,640
Industrial	\$476,993,300
Commercial	\$1,488,398,620
Mineral	\$919,001,090
<b>Ohio Income Tax Liability</b>	<b>\$250,750,347</b>
<b>Average per return</b>	<b>\$984</b>

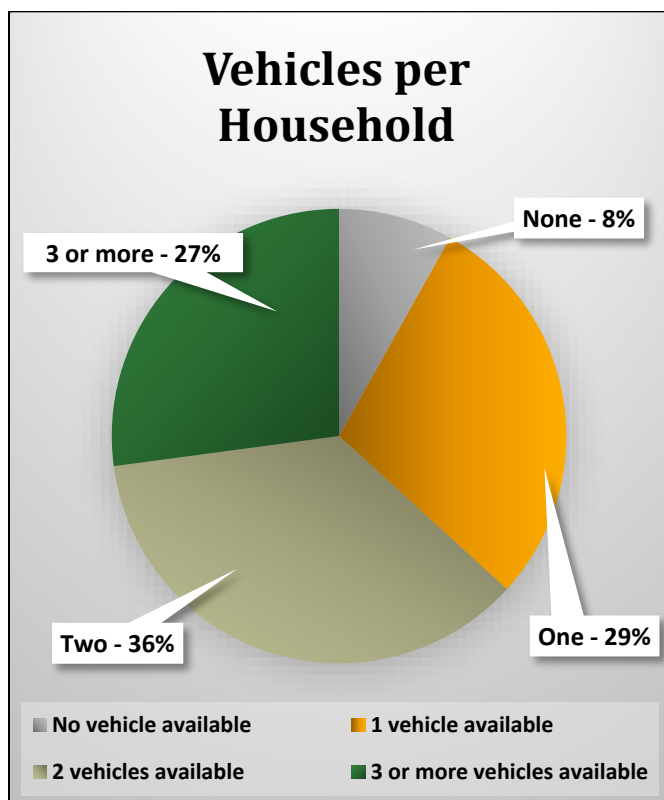
## Families Below Poverty Level





# Housing & Transportation

Median Gross Rent	\$650
Median Monthly Owners Cost	\$1,269
Median Home Value	\$106,650
Total Housing Units	260,827
Owner – Occupied	163,585 – 72.1% of occupied units
Renter – Occupied	63,210 – 27.9% of occupied units
Vacant Units	34,032 – 13.0% of total units

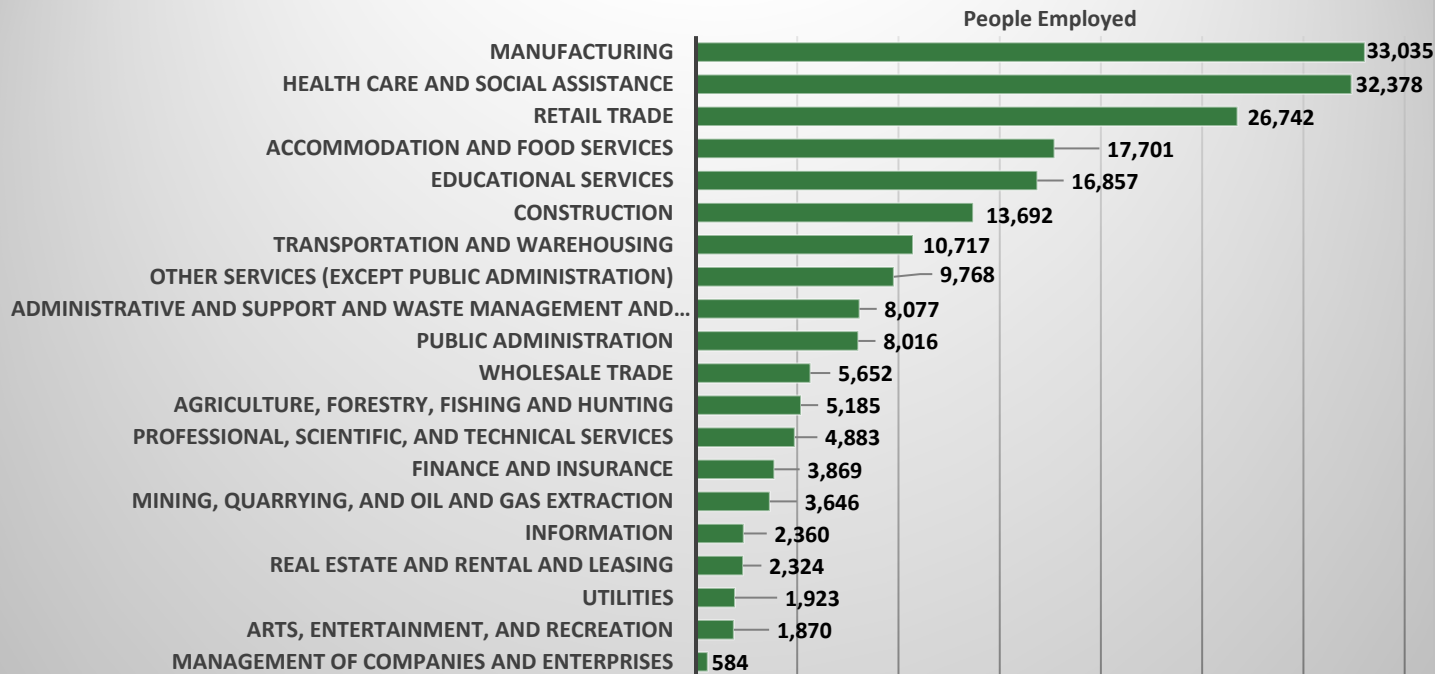


Average Travel Time to Work	24.86 minutes
<ul style="list-style-type: none"> <li>74% of residents with jobs <u>live and work</u> in the OMEGA region</li> <li>26% of residents with jobs <u>work outside</u> of the region</li> <li>14.5% of OMEGA region workers <u>live outside</u> of the region</li> </ul>	
Interstate Highway Miles	147.9
Turnpike Miles	0
U.S. Highway Miles	345.98
State Highway Miles	1,694.25
County, Township, and Municipal Road Miles	11,067.48
General Aviation	10



# Industry & Etc.

## Employment by Industry Cluster



### September 2021

Labor Force (not seasonally adjusted)	Unemployment Rate
256,733 (↓ 2% since 2020)	5.0% (↓ 1.8% since March 2020)

New AMG Vanadium Plant – Muskingum County



### Educational Resources

Public Schools	31
Private Schools	33
Charter Schools	5
4-year Universities	2
Regional Campuses	7
2-year Public Colleges/Satellites	6
Public Library Facilities	81
State Parks, Forests, Nature Preserves, etc.	92

### Healthcare

Registered Hospitals	12
Number of beds	1,876
Physicians	657
Per capita	1.15 doctors for every 1000 people
Licensed Nursing Homes	67
Number of beds	5,411
Adults w/ Health Insurance (Age 18 - 64)	89.0%
Children w/ Health Insurance (Age <19)	92.6%