JobsOhio
Public Board Meeting

December 4, 2020

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Call to Order

Bob Smith, Chairman

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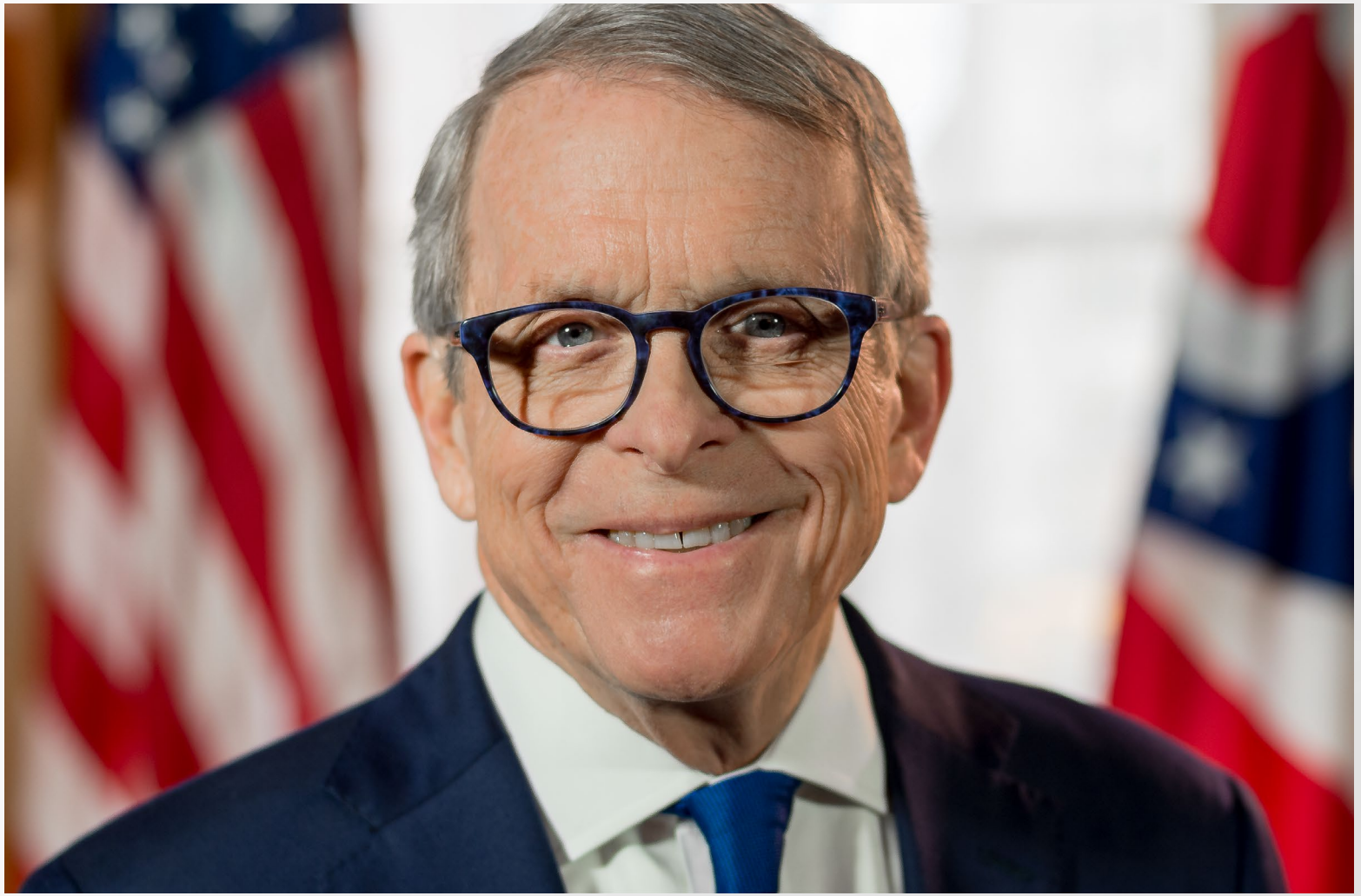
Governor Mike DeWine



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Agenda

- Approve Minutes of September 25, 2020
- President's Report
  - 2020 Review of 2020 Economic Development Initiatives
  - Project Pipeline Report
  - PPE Reshoring Leadership Initiative
  - Economic Outlook
- JobsOhio Beverage System Update
- Committee Reports
- Adjourn

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Approve Meeting Minutes: September 25, 2020

Bob Smith, Chairman

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President's Report

J.P. Nauseef

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2020 Year in Review

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A Generational Opportunity for Ohio

Leverage **Positive Global Awareness**

Ohio's value proposition NEVER more evident

- National focus on reshoring aligns with Ohio's diverse industry, workforce & location
- Economic duress accelerates emerging trend away from the coasts to Ohio's affordability & livability

JobsOhio and its statewide partner network in place & aligned with DeWine Administration to position Ohio to emerge a leader

Gov. DeWine
response to crisis
widely praised

Ohio "Stood Out"
as a model amongst
states and nations

~$25 Million
earned value

JobsOhio

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#3 mfg workforce in U.S.A.

4.8% mfg output in U.S.A.

1-day drive from 60% market

JobsOhio

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#2 Most Affordable State

- **45%** lower cost than NoCal
- **72%** lower cost than NYC
- **20%+** lower Healthcare costs

Best Cities for Homebuyers

- **#4** Dayton
- **#7** Akron
- **#8** Columbus
- **#10** Cincinnati

Low risk for natural disasters

(USNews, Sperling)

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JobsOhio

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“Ohio Forward” Priorities

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Generational Opportunity

80% projects, new jobs originate from Ohio businesses expanding in Ohio

- More business retention and expansion
- Tools to expand, consolidate & modernize
- Lead USA in reshoring supply chains
- Best state for military & federal missions, members, families & veterans

1. **Focus on Ohio Businesses FIRST**
2. Get Ohioans back to work
3. Diversify deals, accept prudent risk
4. Inclusive recovery for ALL OHIOANS

JobsOhio

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Generational Opportunity

Many Ohioans displaced due to COVID

- OHIO TO WORK to enhance workforce dev eco-system, match displaced Ohioans with up-skilling and in-demand jobs
- Retain, grow, attract and place in-demand talent with open in-demand positions

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JobsOhio

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Generational Opportunity

Ohio is recognized as the most innovative state in the Midwest

- Invest in placemaking through creation of up to 3 Innovation Districts
- Develop funding sources for Ohio entrepreneurs & strategic opportunities

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Generational Opportunity

Improve Ohio's Opportunity to Win Deals

- Build a statewide portfolio of diverse, speculative, authenticated, job ready sites
- Differentiate to align with sector-strategies through the Ohio Site Inventory Program

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Generational Opportunity

Economic Development for ALL Ohioans

- Ensure Ohio's economic recovery and growth are sustainable
- Tools & economic development programs to engage & support under-represented populations & geographies
- Expand access to affordable Broadband

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JobsOhio

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JobsOhio & Network Key Initiatives

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Jobs Ohio Key Initiatives & Functional Support

JobsOhio 1.0 — 2011 – Present

9 Resilient Sectors

- Organization & Culture
- Strategy
- Beverage System
- Finance
- Gov Affairs
- JobsOhio Network
- Compliance
- Marketing & Comms
- Data & IT Support
- Business Development
- Legal
- Research
- 6 Econ Dev Programs

JobsOhio 2.0 — 2020 – Present

10 Resilient Sectors

- Talent
- Sites
- Innovation
- Diversity, Equity & Inclusion
- Engagement
- Inclusive Economic Development
- Find it Here + Find Your Ohio
- Air Service Restoration
- 13 Econ Dev Programs

JobsOhio 2.X — 2020 –

- COVID PPE
- 10 COVID Response
- Ohio PPE Leadership
- Ohio To Work™
- Broadband
- Ohio is for Leaders
- Enhanced Lending Support
- Increased Board Cadence
- Organization Virtual Ops

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Generational Opportunity

Many Ohioans displaced due to COVID

- Ohio To Work™ to enhance workforce dev eco-system, match displaced Ohioans with up-skilling and in-demand jobs (JO 2.X)
- Talent Matchmaking (JO 2.0)
- STEM Talent Production (JO 2.0)

1. Focus on Ohio Businesses FIRST
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JobsOhio

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Talent – Ohio To Work™

- Ohio To Work™ Pilot Launch
- 45+ Employers Engaged
- Reach 50,000 Job Seekers
- Ensured DEI

Kristi Clouse, Senior Managing Director

Ohio TO WORK

2020 Goals

- ✓ Ohio To Work™ pilot
- ✓ Reach 50,000 Job Seekers
  (58,722 as of Nov 11, 2020)

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Ohio To Work™

Strong Engagement & Positive Feedback

81%

Tech Elevator applicants underrepresented in Tech
(>50% Black or African American, >50% women)

> *We have been able to **attract more diverse candidates through OTW**. And assessment scores of accepted candidates beat our regular process!*
>
> **- Tech Elevator**

100%

Employers would Join another VCF
20 employers registered for 12/10 fair

> *In the past, we've lost great candidates because they couldn't secure affordable financing. **The Ohio To Work ISA eliminates that barrier.***
>
> **- We Can Code IT**

Distinctive Features

- Connecting The Workforce
- Delivering Cutting Edge Solutions; Equipping Workers
- Advancing Equity
- Speed That Crisis Demands

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Ohio TO WORK

In partnership with

Ohio MEANS Jobs®

Cleveland–Cuyahoga County

A proud partner of the American Job Center network

Urban League of **Greater Cleveland**

Empowering Communities. Changing Lives.

Goodwill

Industries of Greater Cleveland & East Central Ohio, Inc.

JobsOhio

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Jobs Ohio Key Initiatives & Functional Support

JobsOhio

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JobsOhio 2.0 — 2020 – Present

10 + Military & Federal

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Generational Opportunity

Leverage positive global awareness resulting from DeWine Amin Response to COVID

- Attract Capital Investment, Jobs
- Attract Workforce/Families Fleeing Coasts
- Align with Administration and other Partners, measure to optimize ROI

Marketing Ohio

- "Ohio is for Leaders," launched Q3, 2020
- Support leads & opportunities
- Shape Ohio Brand

Renae Scott, MD, Marketing

2020 Goals

- ✓ Align branding with state Ohio. Find It Here.
- ✓ Launch Ohio is for Leaders

JobsOhio

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Ohio is for Leaders

A Generational Opportunity

Leverage positive awareness generated by DeWine Administration crisis response to attract workforce and business with Ohio's unique value prop

- Drive awareness of Ohio in a bold manner
- Improve perception of workforce and businesses in Ohio.
- Generate buzz and conversation

JobsOhio

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Ohio is for Leaders

30MM+
Impressions
26% OVER projections

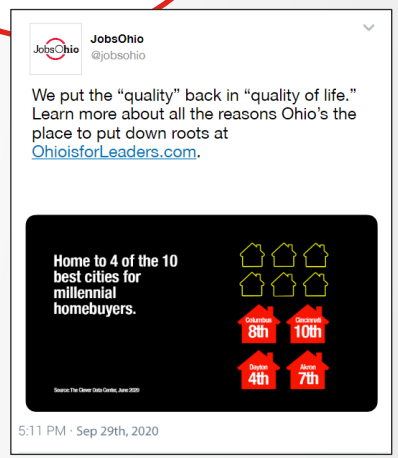
5.6MM+
Video Views
Exceeding benchmarks

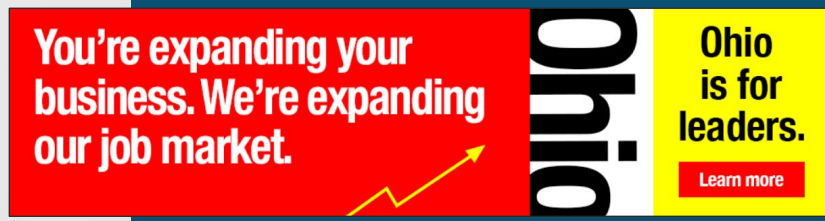
39K+
Site Users
Exceeding benchmarks

$150K+
Bonus impressions in added value

2.1MM
Social impressions in partnership with Bloomberg

1:02
Average user spent exploring JobsOhio content





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Ohio is for Leaders

Realtime Measurement Study

62.5%
Ad viewers felt more positively about Ohio

+7%
Increase in brand recall amongst audience

50%
Ad viewers felt more likely to seek information about Ohio

Study criteria:

- Activate screens in locations with a high concentration of the target audience from **September 28 to October 4, 2020**
- **2,000 Sample Size**

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Project Pipeline

Dana Saucier

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Generational Opportunity

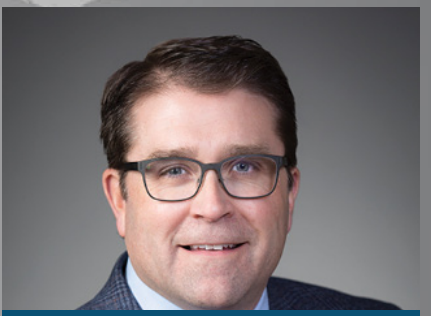
Sector

Focus economic development deals on Ohio's 10 resilient sectors

- More business retention and expansion
- Attract, consolidate & modernize
- Lead USA in reshoring supply chains
- Best state for military & federal missions, members, families & veterans

Economic Dev Sectors

- Retain, Expand, Attract new jobs, capital investment & payroll for Ohio



Dana Saucier, VP EDO

2020 Goals

- ✓ New Jobs:
- ✓ New CAPX:
- ✓ New Payroll:
- ✓ Rollout 10th sector

JobsOhio

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Current Pipeline (as of November 24, 2020)

The JobsOhio project pipeline represents the potential deals that JobsOhio and its state, regional and local partners are working to drive job creation and capital investment in Ohio.

ACTIVE PROJECTS BY STAGE*

226 LEADS	**19,829** NEW JOBS **37,897** RETAINED JOBS **$8.7 B** CAPITAL INVESTMENT
19 NEGOTIATIONS	**3,155** NEW JOBS **1,317** RETAINED JOBS **$1.6M** CAPITAL INVESTMENT
119 OFFERS	**18,160** NEW JOBS **39,120** RETAINED JOBS **$14.6 B** CAPITAL INVESTMENT
159 APPLICATIONS	**11,138** NEW JOBS **13,112** RETAINED JOBS **$3.4 B** CAPITAL INVESTMENT

TOTAL PROJECT PIPELINE*

143,728

NEW AND RETAINED JOBS

$28 BILLION

CAPITAL INVESTMENT

Data as of November 24, 2020

* Potential results if all projects are realized.

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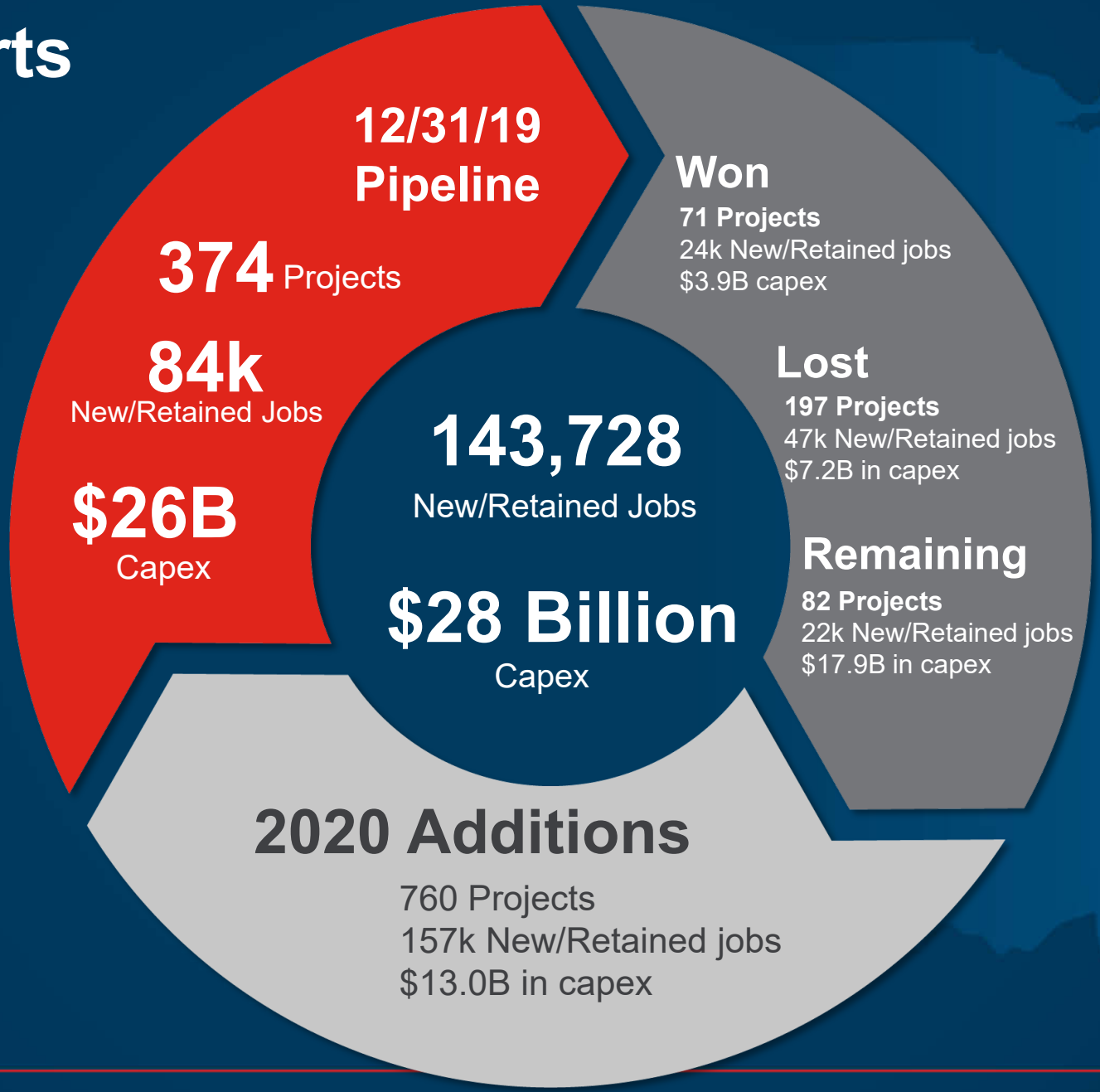
Pipeline Efforts

(through Nov 2020)



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PPE Leadership Initiative – Update

Andrew Deye

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2020 –

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Generational Opportunity

Ohio's value proposition to position to capitalize on move to re-shore

- More business retention and expansion
- Tools to expand, consolidate & modernize
- **Lead USA in reshoring supply chains**
- Best state for military & federal missions, members, families & veterans

Ohio PPE Leadership

- Lead North America in PPE Production
- Lead North America in PPE Distribution
- Lead North America in PPE Innovation
- Establish Ohio as National PPE Stockpile

Andrew Deye
VP, Strategy

2020 Goals

- ✓ Establish Shared Vision
- ✓ Engage Support
- ✓ Develop Plan

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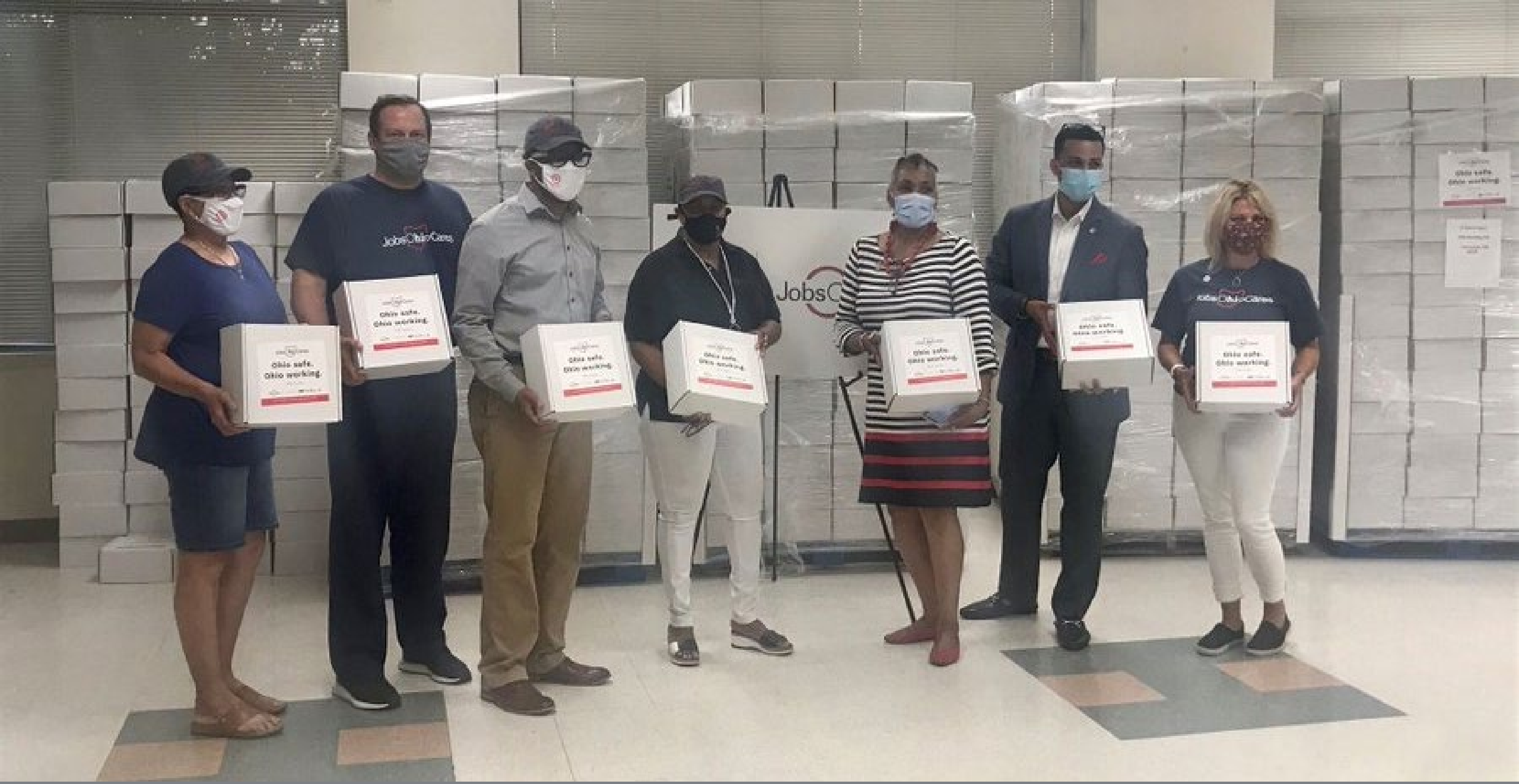

WHEN IT MATTERED MOST / PPE LEADERSHIP PLAN

PPE Leadership – Vision and Pillars

Vison: ***"Ohio is the world leader for innovation, production and distribution of life saving Personal Protective Equipment"***

Four Pillars Strengths

Production

- In-state PPE production is scaling
- Ohio Manufacturing Alliance to Fight COVID-19 / Repurposing Project created a meaningful baseline
- Numerous investment projects in 2021 pipeline

Innovation

- World-class research and medical institutions employ the industry's top scientists and leaders who are innovating advanced PPE solutions for production right here at home

Distribution

- Ohio's highway system, geographic location, and presence of healthcare distributors is a strength in connecting our manufacturers and stockpile to civilians, hospitals, and emergency responders

Stockpiling

- Partnering with federal, state and private medical suppliers that ensures a quickly deployable supply of critical goods.

JobsOhio

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PPE Leadership – Working Group

Matt Waldo

Day-to-Day Lead, Research

Sevy Kraner

Healthcare Expertise (former Cardinal Health)

Glenn Richardson

Manufacturing & Innovation

Kevin Chambers

Distribution & Stockpiling

Charlie Rowell

Business Attraction

JobsOhio

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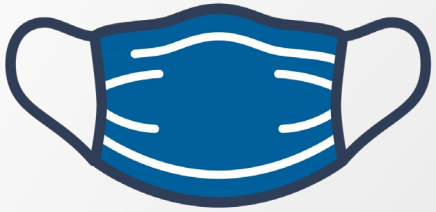
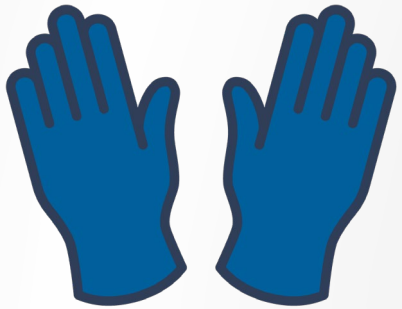
Critical PPE Products

N95 respirators



Surgical masks

Face shields



Gloves

Gowns

Swabs

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Key Takeaways

- **Ohio aspires to become a national and global leader** for the production, innovation, distribution and stockpiling of Personal Protective Equipment (PPE)
- Building business cases for each of the four pillars – **production, innovation, distribution and stockpiling** – to inform companies, investors and stakeholders
- **In-state manufacturing, innovation, distribution and stockpiling** could serve as an "economic prophylactic"
- Positioning Ohio to be a **strategic North American hub for PPE** – key issues relate to scalability and sustainability

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Economic Outlook

Andrew Deye

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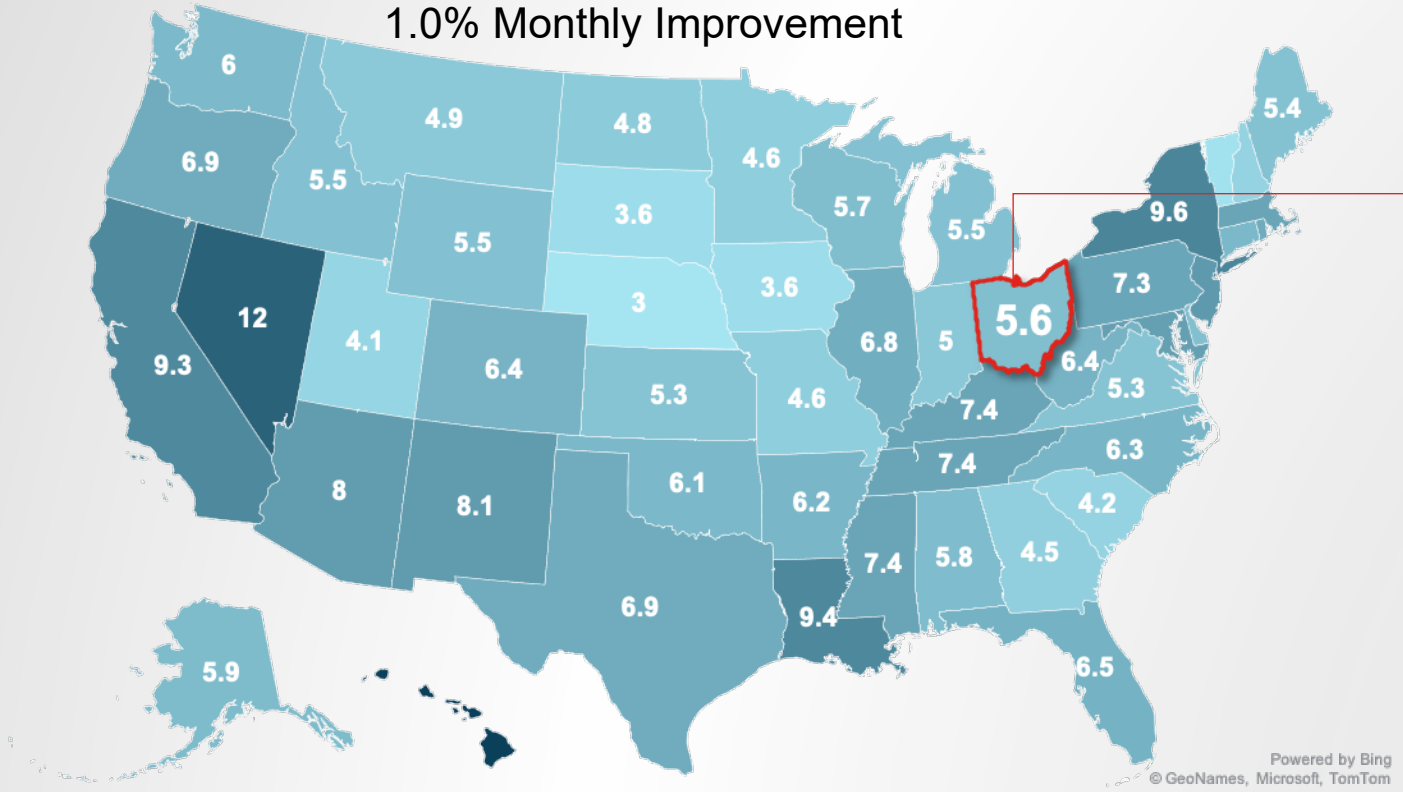
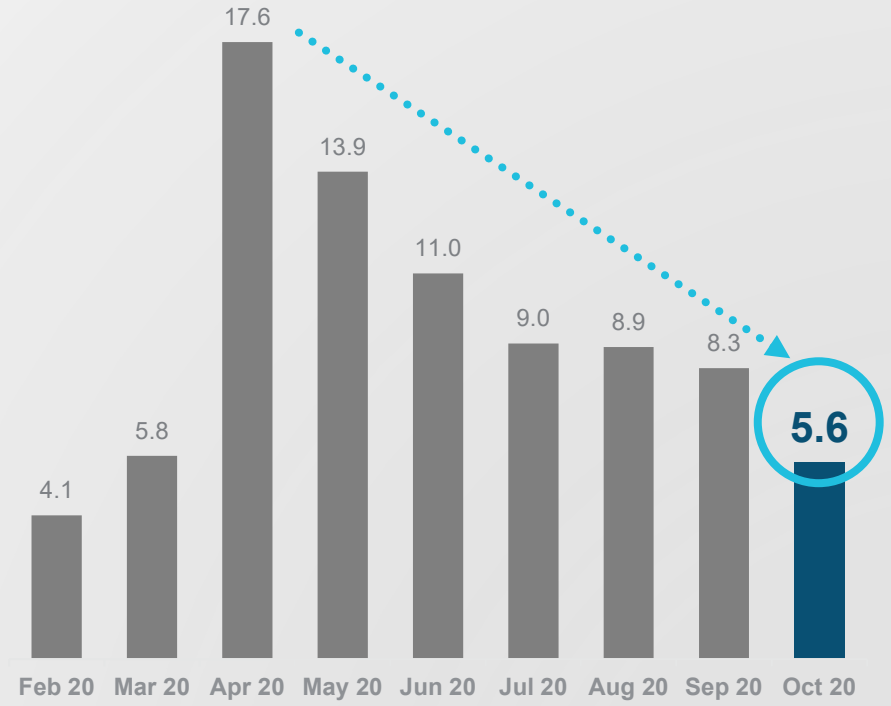
Unemployment Continues to Improve

U.S. Unemployment Rate = 6.9%

1.0% Monthly Improvement



Ohio Unemployment



Source: Ohio Department of Job and Family Services, U.S. Bureau of Labor Statistics, CES Survey

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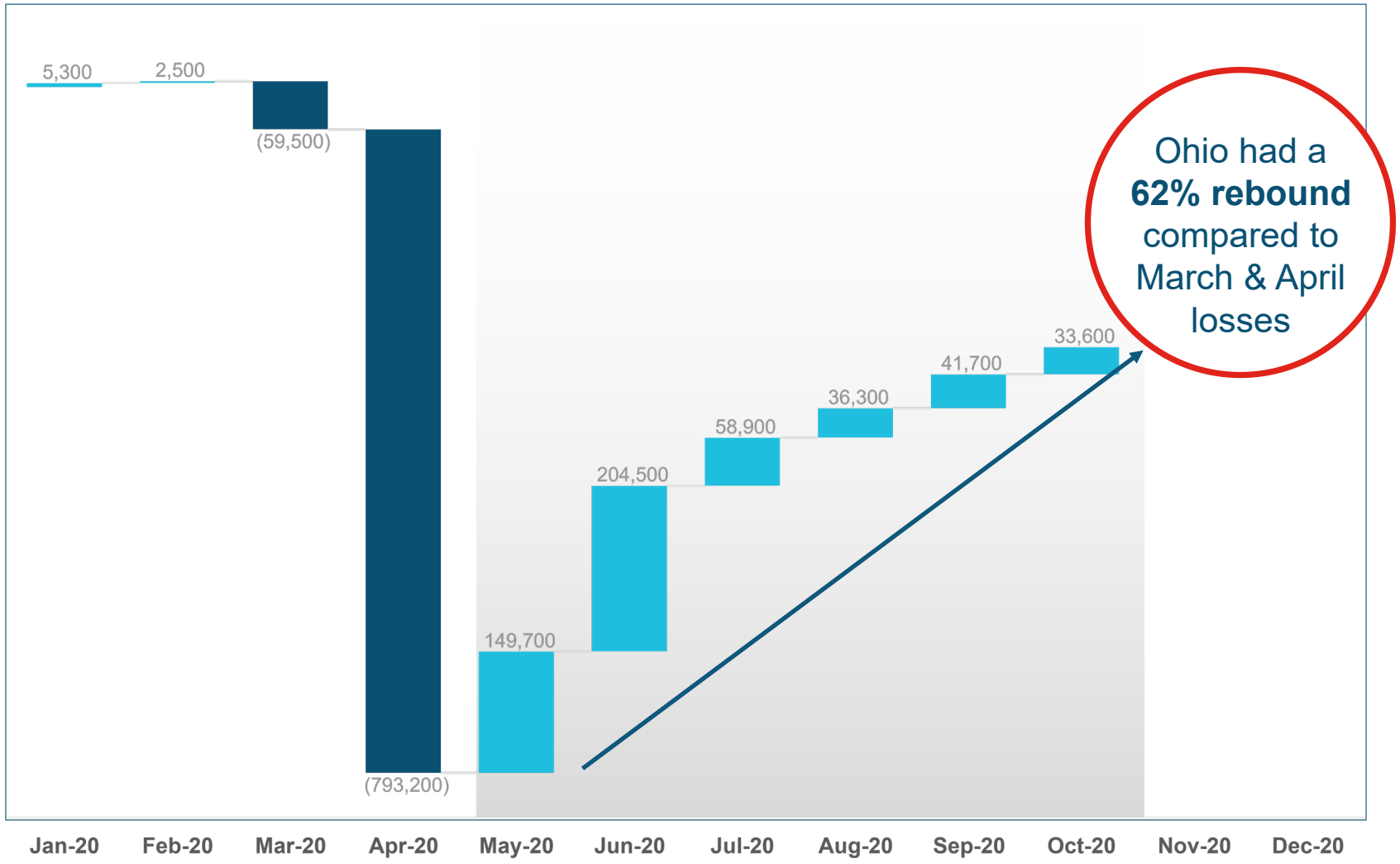
Rapid Change in Private Employment

Month over month private job change for 2020 YTD (Count, SA)

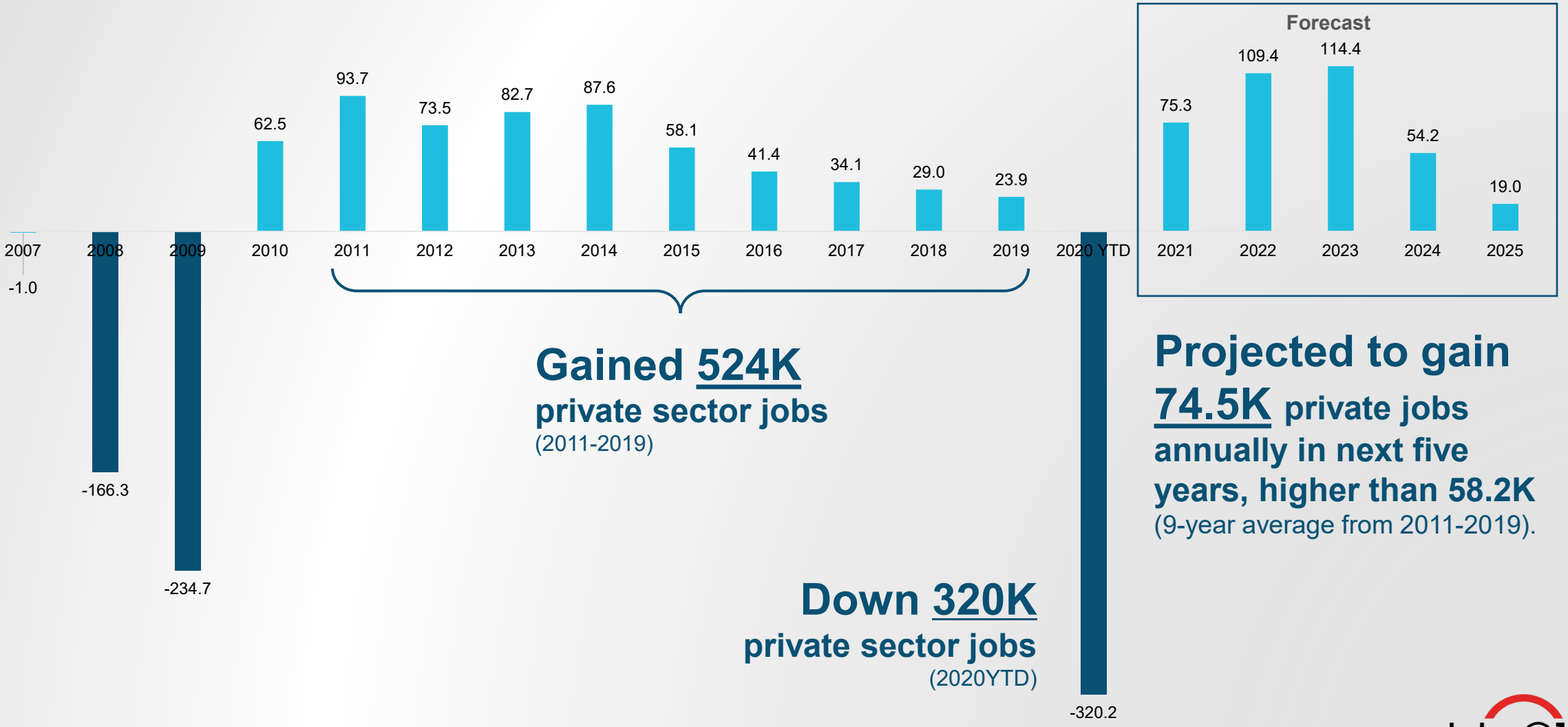


Source: Ohio Department of Job and Family Services, U.S. Bureau of Labor Statistics, CES Survey

Ohio gained back 524,700 private sector jobs from May 1 through October 31

Ohio's unemployment rate ranks 20th among states for October 2020

Projected Job Growth



Gained 524K
private sector jobs
(2011-2019)

Down 320K
private sector jobs
(2020YTD)

Projected to gain 74.5K private jobs annually in next five years, higher than 58.2K
(9-year average from 2011-2019).

Note: 2020 YTD is thru October 2020.

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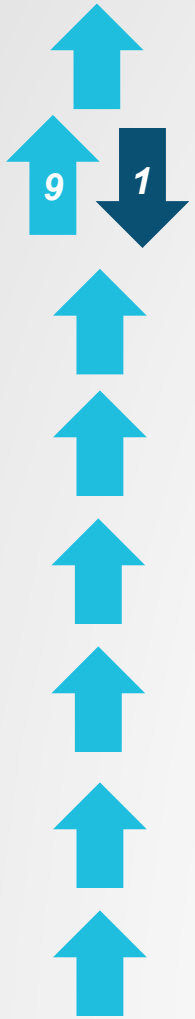
Assessment of 8 Trends Heading into 2021



1. U.S. & global macroeconomic environment
2. Ohio economic/targeted industry trends
3. JobsOhio Sector & BD Attraction, Expansion & Retention impact
4. JobsOhio Regional Partners Attraction, Expansion & Retention impact
5. Quality of Projects Pipeline
6. Availability of talent in Ohio
7. Availability of physical sites in Ohio
8. Overall Ohio economic competitiveness (including brand)

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JobsOhio Beverage System Updates

Lorraine Terry

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Continued Positive Growth since franchise

2013

Acquired

Ohio Spirituous Liquor Enterprise

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OHLQ OHIO LIQUOR

Source: JobsOhio Research

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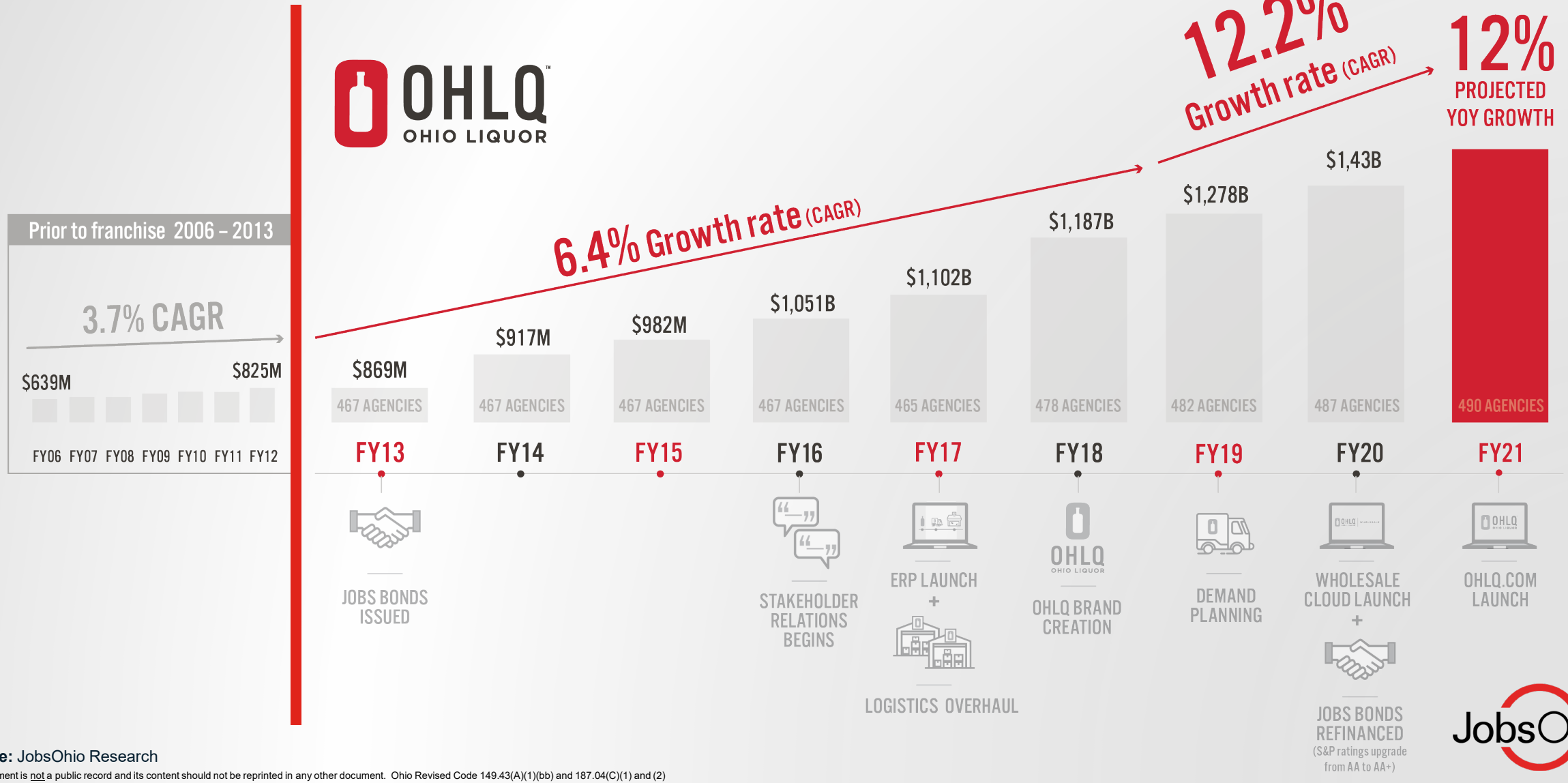
Continued Positive Growth since franchise



Source: JobsOhio Research

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Awards and Recognition

Stateways
Best of the Best

Stateways
Best off-Premise Partnership

AA → AA+

S&P Global Ratings

JobsOhio

Source: JobsOhio Research

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Committee Reports

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Thank you for attending!

Next Meeting: Friday, March 12, 2021

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