

Franklin County Economic Development Capacity-Focused SWOT

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Business Development Advisors

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SWOT Capacities-Focused Framework

Overview

The Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis in the following section crystallizes the strategic issues that will affect Franklin County's economic future and highlights factors that county leaders can alter or support to achieve their objectives or address their concerns. The SWOT analysis will also set the stage for the county to create specific appropriate program responses.

The SWOT analysis summarizes Franklin County's competitive position in four categories:

- People
- Business
- Place
- Policy and Governance

For each of the categories, the SWOT focuses on the intersection of the data and qualitative input collected through focus groups; interviews; opportunity workshops; and review of existing plans, reports, and community planning efforts relevant to economic development policy undertaken by the County or local partners in recent years. The conclusions of the SWOT draw from an analysis of quantitative data, the information gleaned in through the qualitative outreach, and BDA's national perspective and expertise.

Franklin County Critical Issues

The confluence of multiple regional and government planning activities—from Columbus 2020's Regional Economic Development Assessment and Analysis to the City of Columbus' neighborhood planning effort, One Linden and Hilltop—provide fertile opportunity for the Franklin County Economic Development and Planning Department (EDP) to take advantage of the current level of energy, engagement, and focused work to understand how to continue the Columbus region's growth, prepare for the future, and understand the critical issues that limit the economic opportunity for its people. BDA's assessment of the

Selected Consulted Plans and Reports

Affordable Housing Alliance Central Ohio. "The Columbus and Franklin County Affordable Housing Challenge: Needs, Resources and Funding Models." 2017.

Avalanche Consulting for Columbus 2020. "Regional Economic Development Assessment: Report 1: Economic Assessment and Community Benchmarking" and "Regional Economic Development Assessment: Report 2: Competitive Forces Analysis." 2018.

Central Ohio Community Improvement Corporation. "The Beneficial Impacts of Land Banks of COCIC and the City of Columbus." 2018.

City of Columbus. "One Linden." 2018.

City of Columbus and Franklin County, OH. "Local Food Action Plan." 2016.

Economic Development Research Group. "Economic Impacts of the Columbus Regional Airport Authority in 2017." 2019.

Franklin County Advisory Council on Economic Inclusion. "Innovating New Pathways to More Equitable Prosperity," February 2019.

Franklin County Economic Development and Planning. "Annual Report." 2017.

Franklin County Planning Reports: Blacklick-Madison Area, Blendon, Cleveland Avenue Streetscape, Clinton Mifflin, Clinton West Neighborhood, Pleasant Township, Scoito-Franklin, Southwest Plan, Westland

Mid-Ohio Regional Planning Commission. "Insight 2050: Scenario Results Report." 2015; "Rickenbacker Comprehensive Study Economic Development Working Group Meeting Materials." 2018.

Vogt Strategic Insights for Building Industry Association of Central Ohio and the BIA Foundation. "Analysis of Housing Need for the Columbus Metropolitan Statistical Area." BIA Homebuilders 2018.

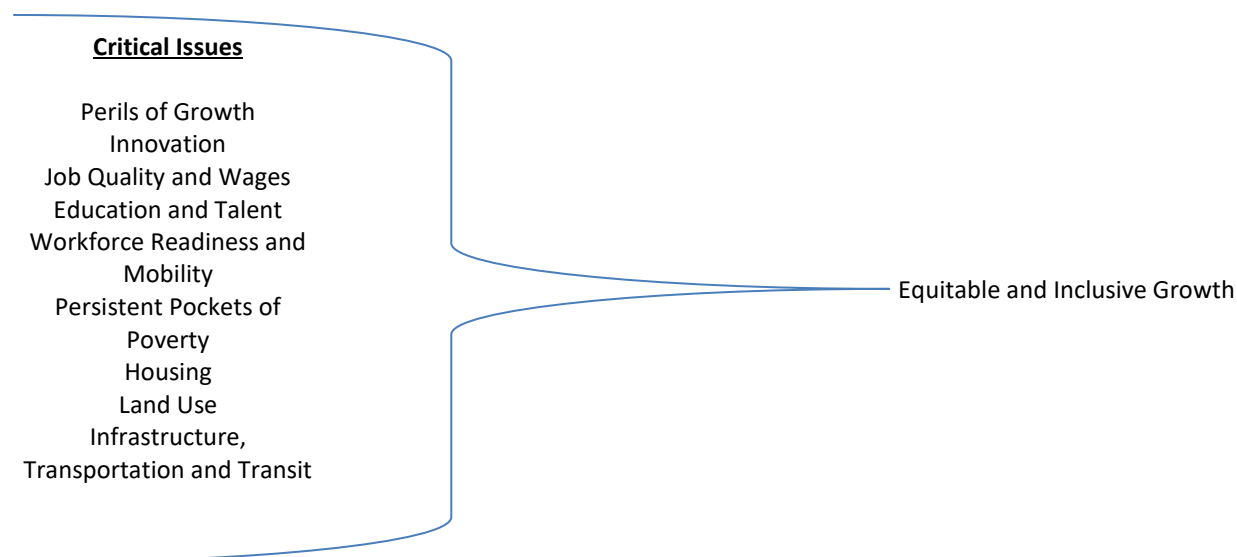
Moore Consulting. "Franklin County Poverty Study." 2019.

Mosaic Community Planning. "City of Columbus and Franklin County Joint Analysis of Impediments to Fair Housing Choice." 2019.

Place Dynamics and Planning Next. "Hilltop USA Market Analysis Small Business Opportunity Study."

Outrich, Michael, Mikyung Baek, and Glennon Sweeney. "Franklin County Poverty Analysis." Kirwan Institute for the Study of Race and Ethnicity. 2018.

conclusions from the current regional efforts and qualitative interviews recognizes **nine** critical issues that inform our analysis and guide our Equitable and Inclusive Growth strategic priorities and tactics.



The frequency of the nine issues across our qualitative efforts drives the narrative for our data analysis and research. The SWOT discussion acknowledges that Columbus growth is beneficial, but it comes with costs and often these costs are not distributed equitably. The depth and breadth of the economic development challenges in the region provide Franklin County with an opportunity to strategically rethink its efforts through a framework of Equitable and Inclusive Growth. The framework can guide Franklin County's and EDP's priorities and partnerships to programmatically address the number and equitable access to quality jobs; economic mobility and opportunity for all residents and businesses; and multiple, intersecting economic and community development disparities. The framework provides a lens of inclusivity that looks to increase the benefit of all residents and businesses, disadvantaged or not.

EDP Goals

Franklin County's EDP relies on multiple partners to address the "traditional" economic development activities within Franklin County; Columbus 2020 and other Local Economic Development Organizations provide administration of a business retention and expansion program due to the missions and tools available to those organizations. BDA's SWOT and economic development strategy recognizes that this affords the County the opportunity to (1) provide leadership in cross-jurisdictional and cross-sector conversations, convened for the purpose of finding solutions to broad regional challenges; and (2) develop niche economic developing programming, like Smart Works, to help solve these regional challenges that are in need of a collective multisector approach.

The Franklin County EDP has a capability to influence economic development policy while desiring to ensure all EDP programming promotes equitable opportunity for all county residents. The goals provided guidance to our process and work.

The County's current capabilities and goals emphasize the need to align vision, priorities, partners, and efforts for comprehensive economic and community development. An equitable and inclusive growth and development framework requires focus on the **essential capacities** of the Columbus economy and guides investment across the capacities that are too often separated in to distinct "siloed" planning and program efforts.

Essential Capacities of Economic Growth

Franklin County seeks to allocate resources for the collective good of its residents, satisfying a large number of constituencies. With this role, "government is the actor in the economy best positioned to act with an eye to the long run, undertaking [informed] investments that provide a platform for economic growth...and building and bolstering the capacity for economic actors to realize their potential".¹ An equitable and inclusive growth framework enhances the capacities of a community in order to create economic wealth that benefits the community, grow opportunity for its residents and businesses, and improve the quality of life of the community as a place.

Building Capacity in Franklin County: People, Business, Place, and Policy

The core of this definition recognizes that People, Business, and Place are all critical to building a successful economy, and **place-conscious** economic and community development seeks to improve the connections of People, Business, and Place beyond the neighborhood to regional opportunities and national and global markets. Strategic capacity investment requires policies that can address the long-term growth and critical issues facing the County and the Columbus metropolitan area. Thus, Policy and Governance leadership is a consequential fourth capacity that Franklin County EDP can enhance as it pursues an equitable and inclusive economic and community development strategy.

The four capacities shape our analysis of the critical issues and represent concepts that Franklin County EDP can use as benchmarks for making progress. An assessment of capacities provides a diagnosis that can help the County to understand where capacity is strong, increasing, weak, or decreasing and highlight where additional information is needed to understand roadblocks, stumbling blocks, and information gaps.

Franklin County EDP Goals

1. Economic development activities and programs should align with and contribute towards the region's collective economic goals of increasing per-capita income, increased capital investment and increased job growth
2. Economic development activities and programs should promote an equitable Quality of Life and Place for all Franklin County residents
3. Economic development activities and programs should play a role in lifting Franklin County residents out of poverty
4. Economic development activities and programs should help create an economic environment where entrepreneurs of diverse backgrounds and incomes are able to startup and grow businesses across all industry sectors
5. Economic development activities and programs should promote and improve the environmental sustainability of the region
6. Economic development activities and programs should contribute to the fiscal sustainability of the County and its partners - either in terms of tax revenue generated as a result of economic growth, program income, and/or in a decreased need for public spending, particularly on social services
7. Economic development activities and programs should fill gaps in local economic development programming in order to support the growth and development of the political subdivisions within Franklin County.

¹ Maryann Feldman et al., "The Logic of Economic Development: A Definition and Model for Investment," *Environment and Planning C: Government and Policy* 34, no. 1 (February 1, 2016): 14, <https://doi.org/10.1177/0263774X15614653>.

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People Capacity

People capacity focuses on individuals and challenges that influence their potential for economic and community development and opportunity. At its core, people capacity is about increasing individual or community skills, knowledge, and experience. The question is how to develop, connect, and attract people with skills and educational opportunities within the community.

Business Capacity

Business capacity assesses the assets or challenges relevant to business, including workforce (people), facilities and equipment, organization, and the production supply chain. Business capacity emphasizes adding or reallocating resources (employees, inventory, equipment, capital, etc.). A related and vital component of business capacity is the innovation and entrepreneurial capacity of neighborhoods and region, including the potential for generating new and growing existing small businesses as well as high-growth businesses.

Place Capacity

Place capacity focuses on the physical and environmental assets or challenges that influence the potential for economic and community development. It includes infrastructure, buildings, and public spaces, but it is also essential to understand the physical and emotional relationship that residents have with their home, neighborhood, and town/city. Most people can identify assets that create a sense of pride in the neighborhood and describe what is missing. Place-building seeks to create desirable spaces where people are comfortable and that enable access and participation in regional opportunities, such as transit and focusing on spreading job nodes.

Policy and Governance

Policy and governance capacity identifies the core powers of government and its ability to set the rules and regulations guiding investments and incentives which enable people, business and place to realize their full potential. For Franklin County EDP, the leadership, direction, and guidance are particularly relevant for its sub-county municipalities. With 17 townships, 16 cities, and 10 villages, the County could perform many roles, including funder, administrator, partner, and capacity-builder to those municipalities lacking economic and community development staff and expertise. Within Franklin County government, EDP could build internal collaboration to capitalize on their equitable capacity-focused work with other departments in the County that have overlapping programs and initiatives. The County's recent policy discussions following the Poverty Study and Economic Inclusion Advisory Council's work exhibit intention to address critical issues and provide fertile ground for joint equitable and inclusive policies.

Capacity-focused SWOT: Franklin County's People, Business, Place and Policy

Attention to these four capacities will enable Franklin County and its communities to be prepared for growth and economic opportunities in order to achieve their own economic development objectives. The SWOT analysis is structured around the four capacities to uncover the strengths, weaknesses, opportunities, and threats related to each of the capacities. Although many definitions exist for these elements of the SWOT, the following serves as a guidepost to the organization of the discussion:

- Strengths are a region's relative competitive advantages (e.g., industry supply chains and clusters, extensive port, rail, and broadband assets, specialized workforce skills, higher education levels, collaboration among stakeholders) and often are internal in nature;
- Weaknesses are a region's relative competitive disadvantages (e.g., a risk-averse or change-resistant regional culture), also often internal in nature;
- Opportunities are chances or occasions for regional improvement or progress (e.g., expansion of a biosciences research lab in the region), often external in nature; and
- Threats are chances or occasions for negative impacts on the region or regional decline (e.g., several companies in the region considering moving to lower-cost areas of the state), also often external in nature.²

Each essential capacity (People, Business, Place, and Policy and Governance) includes a discussion for each element of the SWOT. At the conclusion of each SWOT element, we summarize and wrap up each capacity around appropriate "themes". Following the discussion of all four elements of the SWOT for a specific capacity, we further parse each capacity's SWOT "themes" to provide additional context that will guide strategic priorities and tactics. The analysis concludes with a summary and table representing the Capacity-Focused SWOT.

² <https://www.eda.gov/ceds/content/swot-analysis.htm>



People Capacity SWOT

People capacity focuses on individuals and challenges that influence their potential for economic and community development and opportunity. At its core, people capacity is about increasing individual or community skills, knowledge, and experience. The question is how to develop, connect, and attract people with skills and educational opportunities within the community.

Strength: People

Population

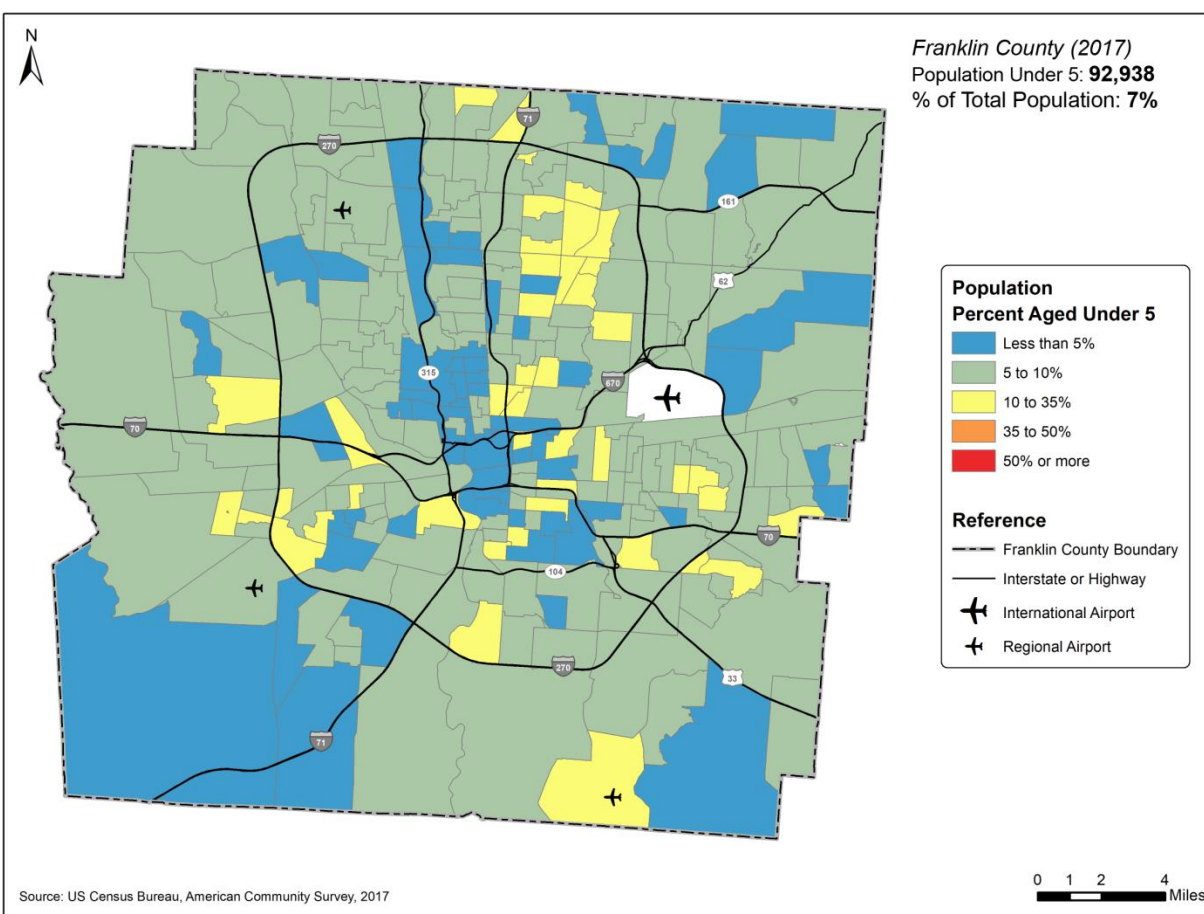
Franklin County and the Columbus region have seen the evidence of increased capacity for their population. The Columbus region has been growing in population and seen increased economic activity. Franklin County's population has increased 7.4% from 2012-2017.³ The increase in the number of tax returns reflect this, up 5.4% between 2011-2016 with increases in the number of returns for salaries and wages (6.2%) and business or profession (9.9%) returns. Unemployment compensation returns also declined by 61%, and there was a decline in the number of returns for filers under \$25,000 (76.3%).

Franklin County, OH Tax Returns											
		Total number of returns		Salaries and wages in AGI number of returns		Business or profession number of returns		Unemployment compensation number of returns		Self-employment tax number of returns	
Adjusted Gross Income		2016	2011	2016	2011	2016	2011	2016	2011	2016	2011
	under \$25,000	223,990	242,706	182,700	193,231	37,910	38,584	3,600	15,194	30,200	NA
	\$25,000 under \$50,000	167,150	154,700	149,710	138,431	18,390	15,749	3,830	8,183	12,440	NA
	\$50,000 under \$75,000	88,580	79,955	77,990	71,510	11,670	11,030	2,050	3,955	8,310	NA
	\$75,000 under \$100,000	52,810	46,956	46,850	42,841	8,670	7,980	1,220	2,252	6,380	NA
	\$100,000 under \$200,000	67,800	51,954	61,400	48,146	14,020	10,827	1,460	1,879	11,090	NA
	\$200,000 or more	22,320	14,659	20,190	13,304	6,460	4,172	260	255	6,560	NA
	Total	622,650	590,930	538,840	507,463	97,120	88,342	12,420	31,718	74,980	NA
Source: IRS, SOI Tax Stats, County Data											

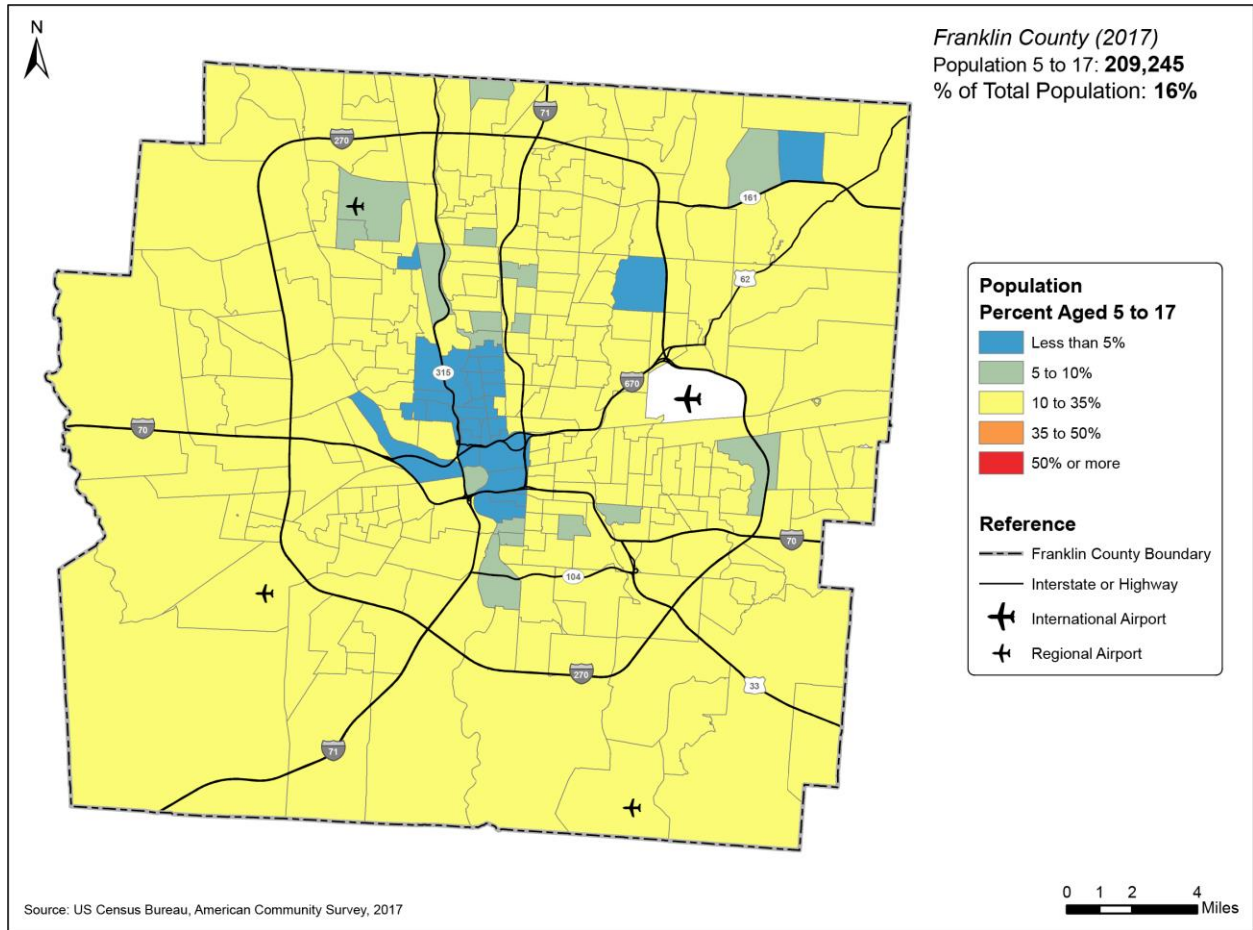
³ American Community Survey, five-year estimates for 2017 and 2012.

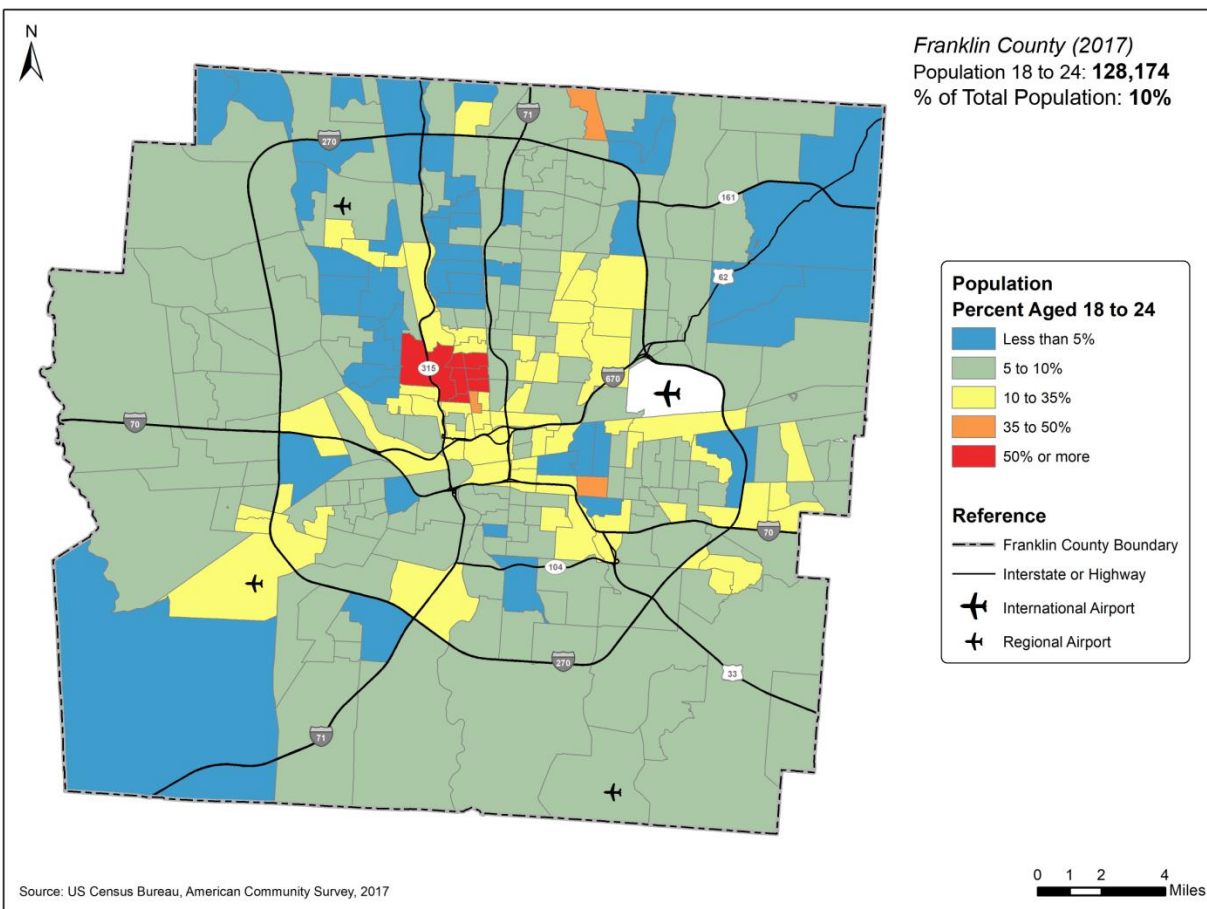
Youthful Demographics

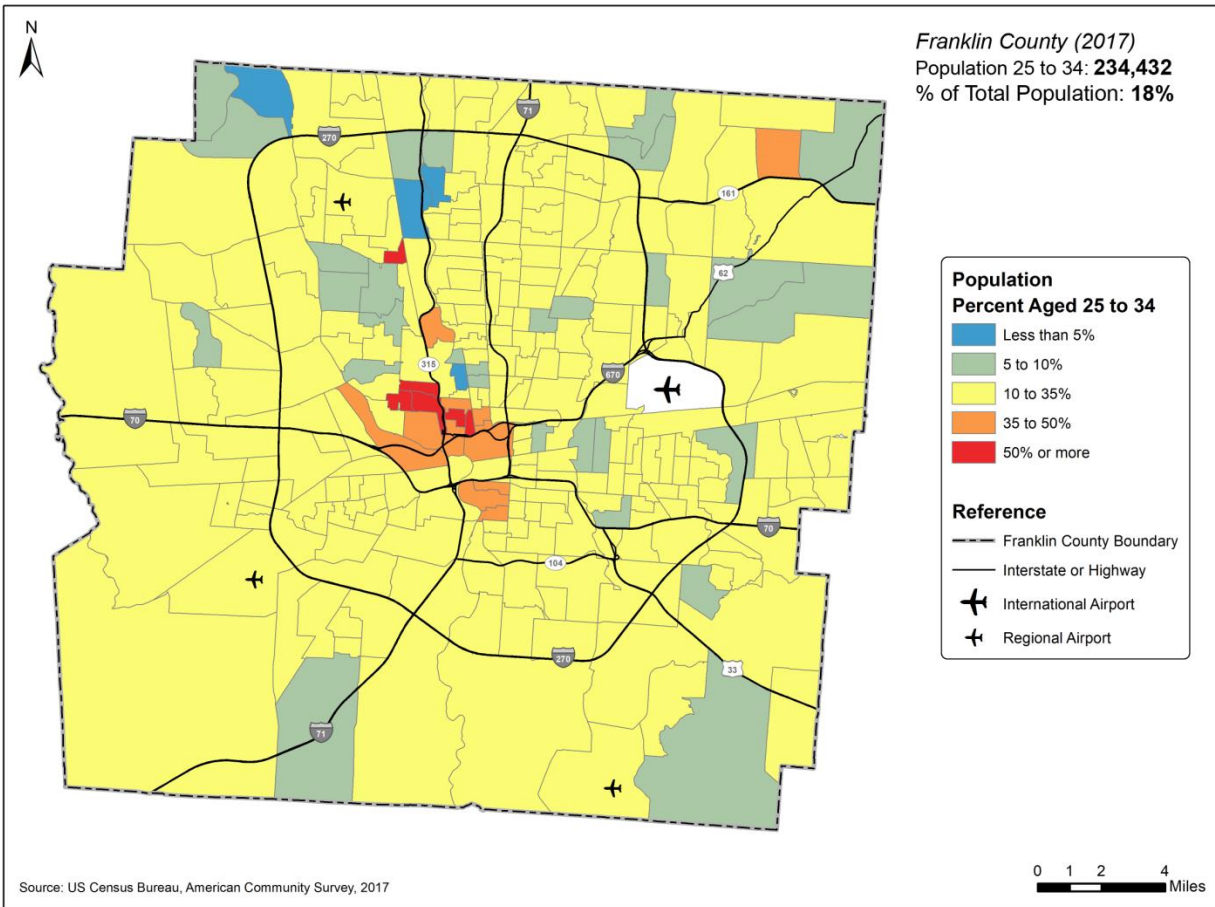
Nearly one out of four Franklin County residents is under the age of 18, making it the largest age segment in the county. The 25 to 34 age range, “Millennials”, is the second largest cohort with 18% of the population as of 2017. Ohio State University (OSU) plays a role with an enrollment of 61,170 for 2018, increasing 2.2 percent from 2017.⁴ Within this younger cohort, the maps exhibit a large concentration of 18-34 year olds around OSU or in the general center of county and downtown Columbus. However, the 35-44 year old cohort is concentrated more in a suburban fashion, and each subsequently older cohort grows more suburban with age. The concentration of older generations in the suburbs is related to the fact that only the “senior” population, specifically those 65-74, grew the fastest in recent years, climbing 32% in the five years between 2012 and 2017 and now accounting for 12% of the County’s population.



⁴ The Ohio State University, “2018 Autumn Semester Enrollment Report: Record Size, Smarts and Diversity at Ohio State,” New Report: Record size, smarts and diversity at Ohio State, accessed February 25, 2019, <https://news.osu.edu/new-report-highlights-record-size-smarts-and-diversity-of-ohio-state-student-enrollment/>.

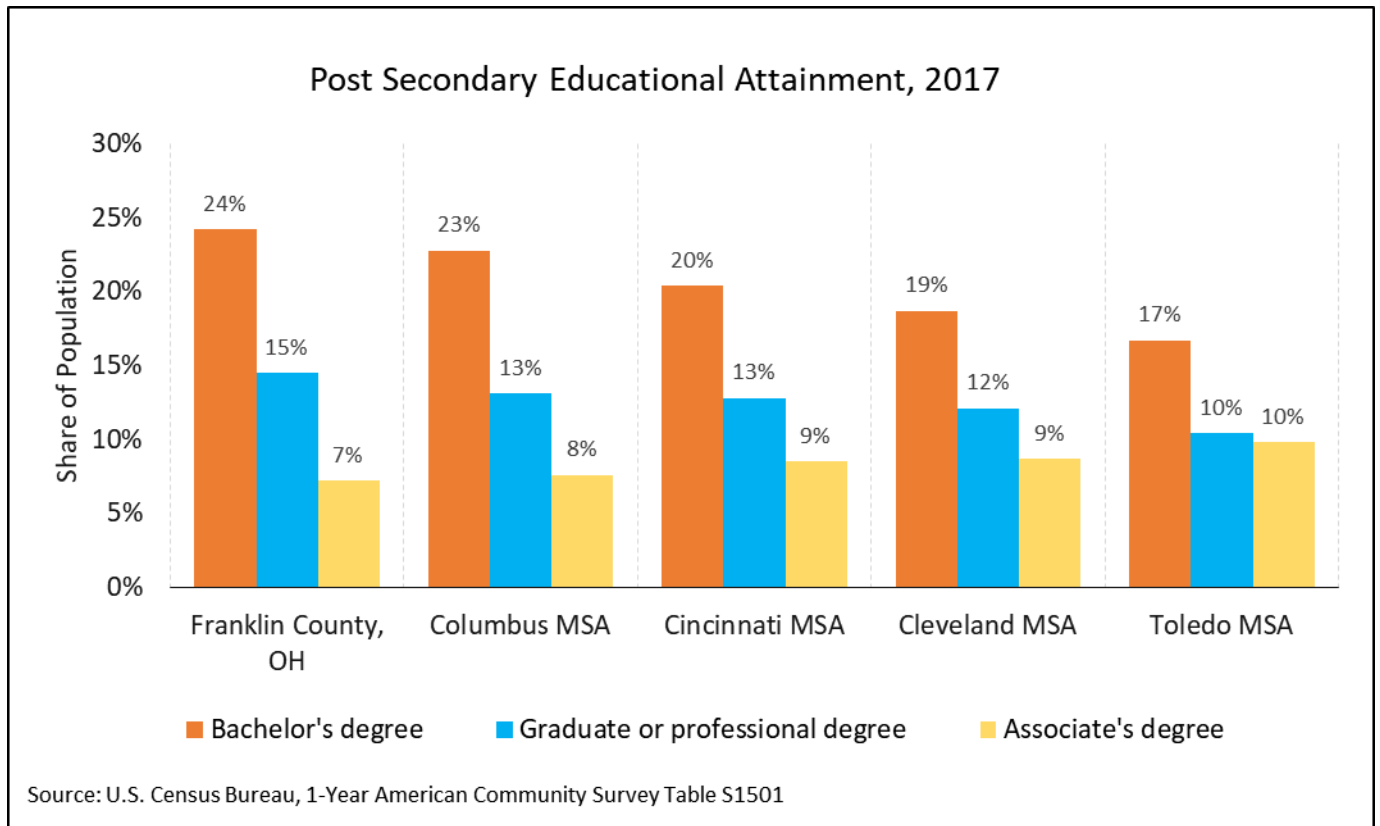






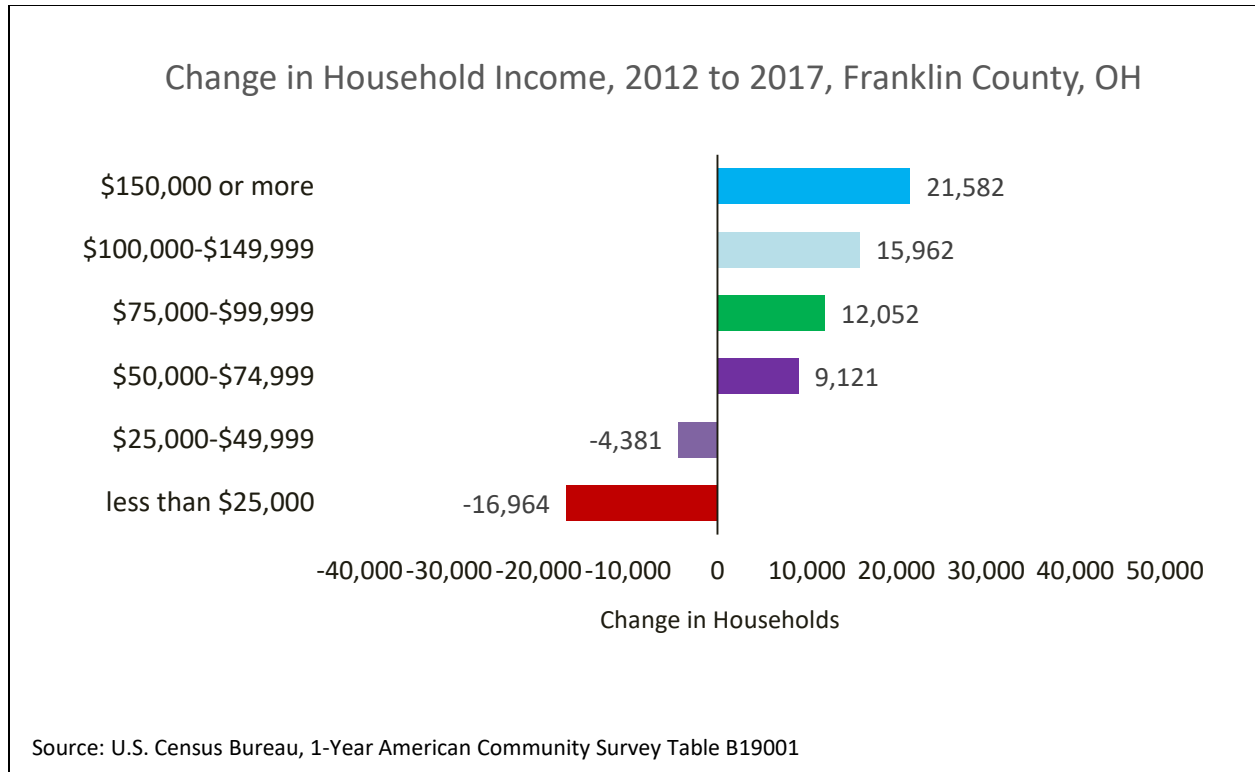
Educational Attainment

Franklin County and the Columbus metropolitan area (MSA) have a larger share of residents with college degrees compared to the other large MSAs in Ohio. Nearly one out of every four Franklin County residents over the age of 25 has a bachelor's degree. At 15%, the County also has the largest share of residents with a graduate or professional degree compared to both the Columbus MSA and the other large MSAs in Ohio.

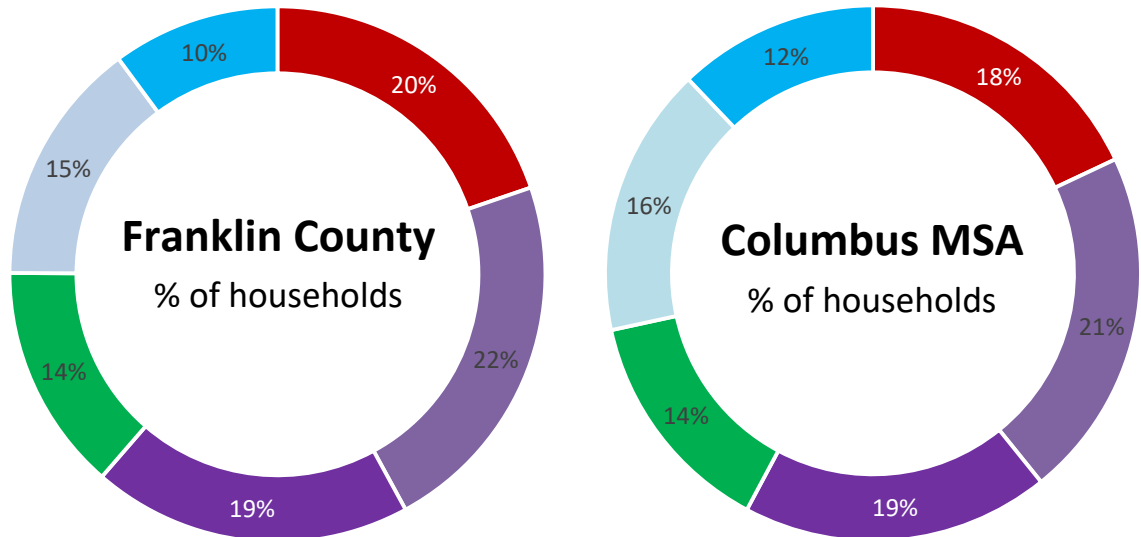


Income

There is a wide range of income levels for Franklin County households. Nearly one out of five households in the County has an annual income of less than \$25,000, but the number has declined. A quarter of all households have an annual income exceeding \$100,000, and income levels have been rising in recent years. Households with annual incomes exceeding \$150,000 per year have been the fastest growing. These trends could reflect the strong job market in the region and low unemployment as more households could have multiple workers.



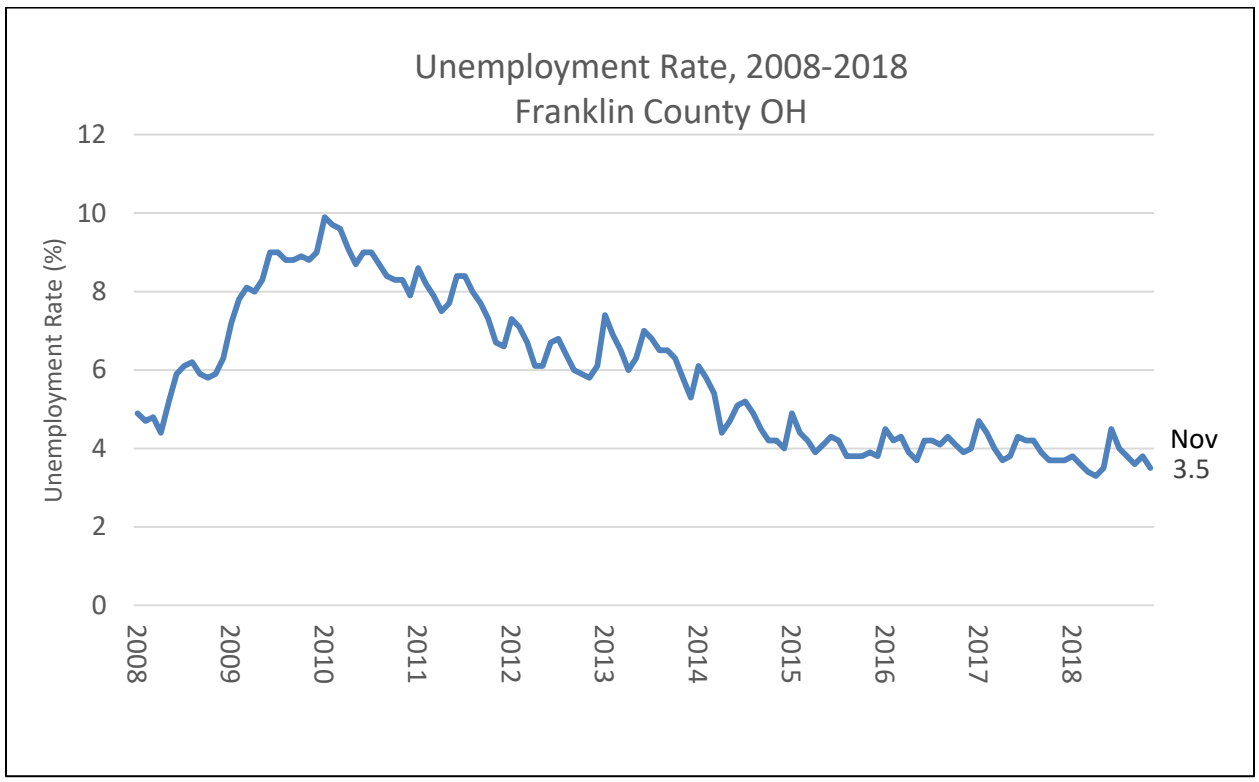
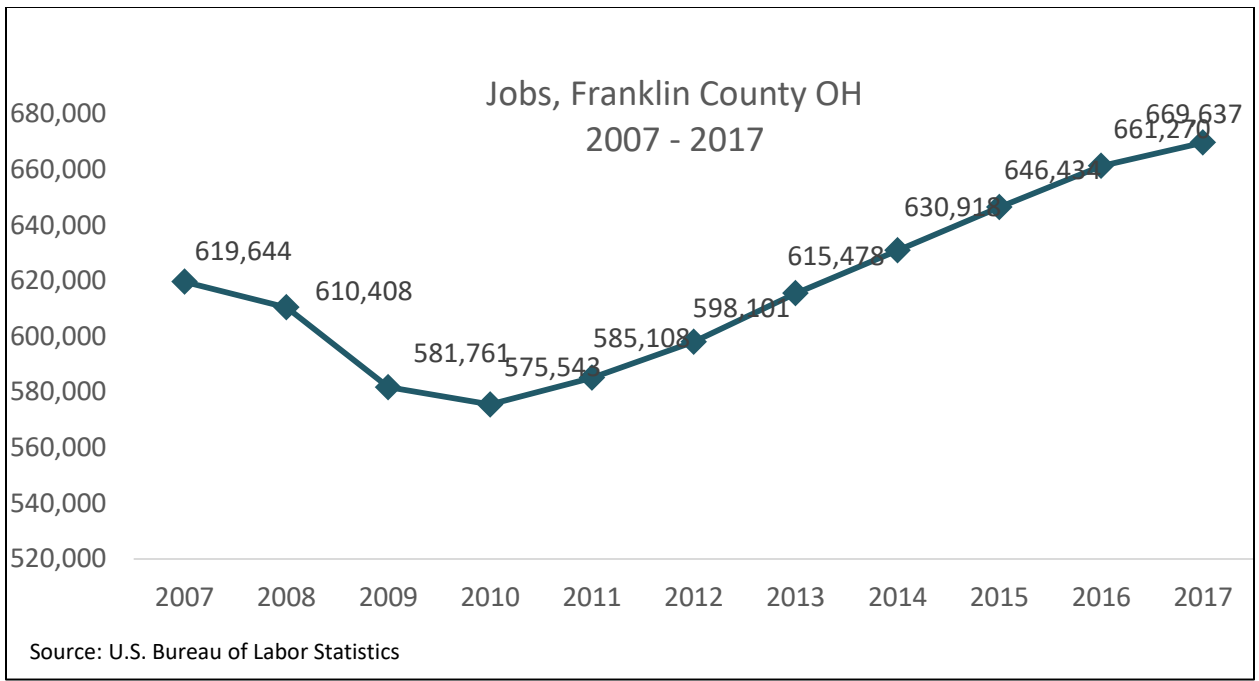
Household Income, 2017



Source: U.S. Census Bureau, 1-Year American Community Survey Table B19001

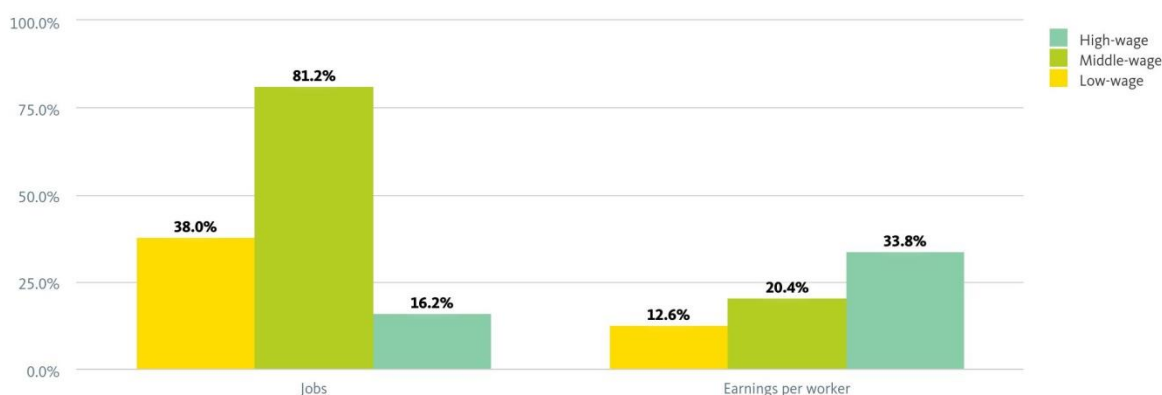
Job Growth

Franklin County had lost 44,000 jobs before the economy made a turnaround in 2011. At 7% of its job base, the County is experiencing a “job recovery”, replacing its 2007 number jobs by 2014. Overall, job growth has been steady since the start of the decade. Since 2010 the County has had an average annual job growth rate of 2.1%. Similar to national trends, the unemployment rate in Franklin County has been trending downward since the start of the decade. At 3.5%, the unemployment rate in the County in November 2018 is slightly lower than the U.S. unemployment rate.



As to whether the job growth is in “good jobs”, the Columbus region experienced the highest job growth in middle-wage industries between 1990 and 2016, but earnings growth was highest in high-wage industries. Growing good jobs is fundamental because they pay family-supporting wages and offer opportunities for upward mobility, and Franklin County’s middle-wage-jobs dynamics could be limiting the horizon.⁵

Growth in jobs and earnings by wage level: Columbus, OH Metro Area, 1990-2016



U.S. Bureau of Labor Statistics; Woods & Poole Economics, Inc.
PolicyLink/PERE National Equity Atlas, www.nationalequityatlas.org

Columbus 2020’s economic assessment found that the labor force participation “rate among residents in the Columbus region between the ages of 25 to 54 was 83.5% in 2016, the 20th highest among benchmark regions.” However, a lower rate of 81.5% for those individuals between the ages of 45 and 54.⁶ Not having this cohort as engaged in the workforce is a likely loss of job productivity from those most likely to have experience and expertise.

Wages and Earnings

Average wages in the Columbus region rose 21%, not adjusted for inflation, from 2006 to 2016.⁷ Average hourly wages tend to be higher in the region compared to the other large metropolitan areas in Ohio. The distribution of median hourly wages by race and ethnicity offers insight to the segment of the population gaining the most from higher average wages. While \$21 is the median for all, at the high extreme Asian and Pacific Islanders earn \$29, Latinos (Hispanic) only earn \$15.⁸ Education plays an expected effect with median hourly wages indicating the importance of a BA degree or higher.⁹

⁵ PolicyLink/PERE, “National Equity Atlas,” 2015, <http://nationalequityatlas.org/>.

⁶ Avalanche Consulting, “Regional Economic Development Assessment: Report 1: Economic Assessment and Community Benchmarking,” July 2018, 18.

⁷ Avalanche Consulting, 5.

⁸ PolicyLink/PERE, “National Equity Atlas.”

⁹ PolicyLink/PERE.

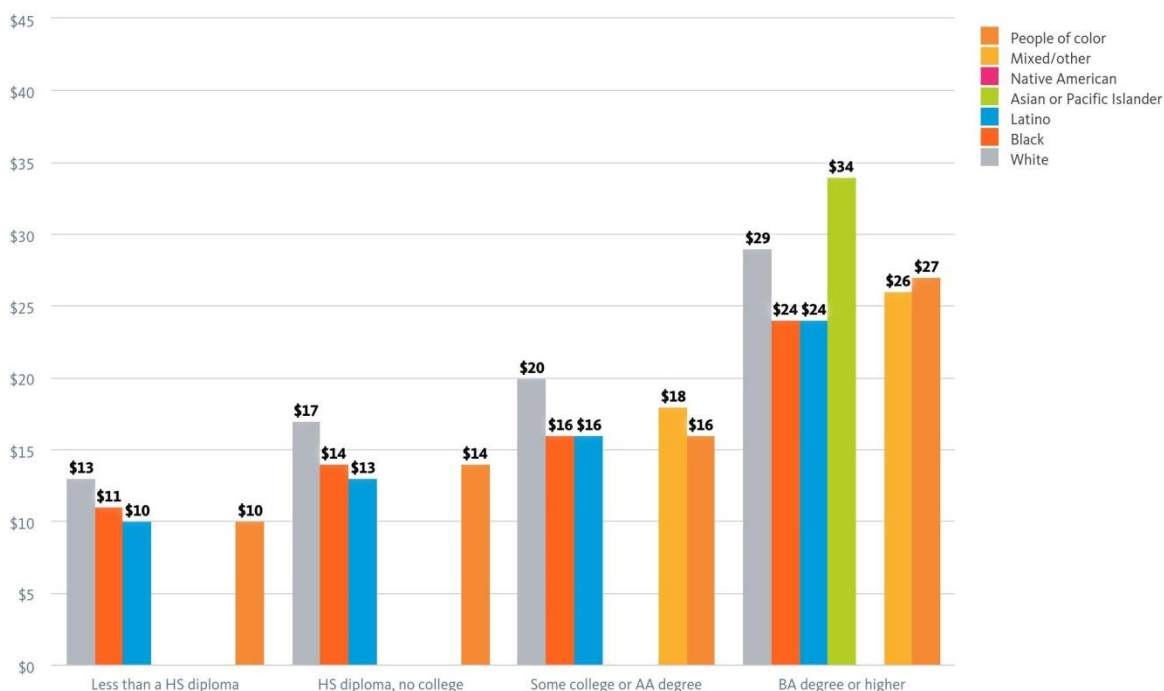
Median hourly wage by race/ethnicity: Columbus, OH Metro Area, 2015



IPUMS

PolicyLink/PERE National Equity Atlas, www.nationalequityatlas.org

Median hourly wage by race/ethnicity and education: Columbus, OH Metro Area, 2015



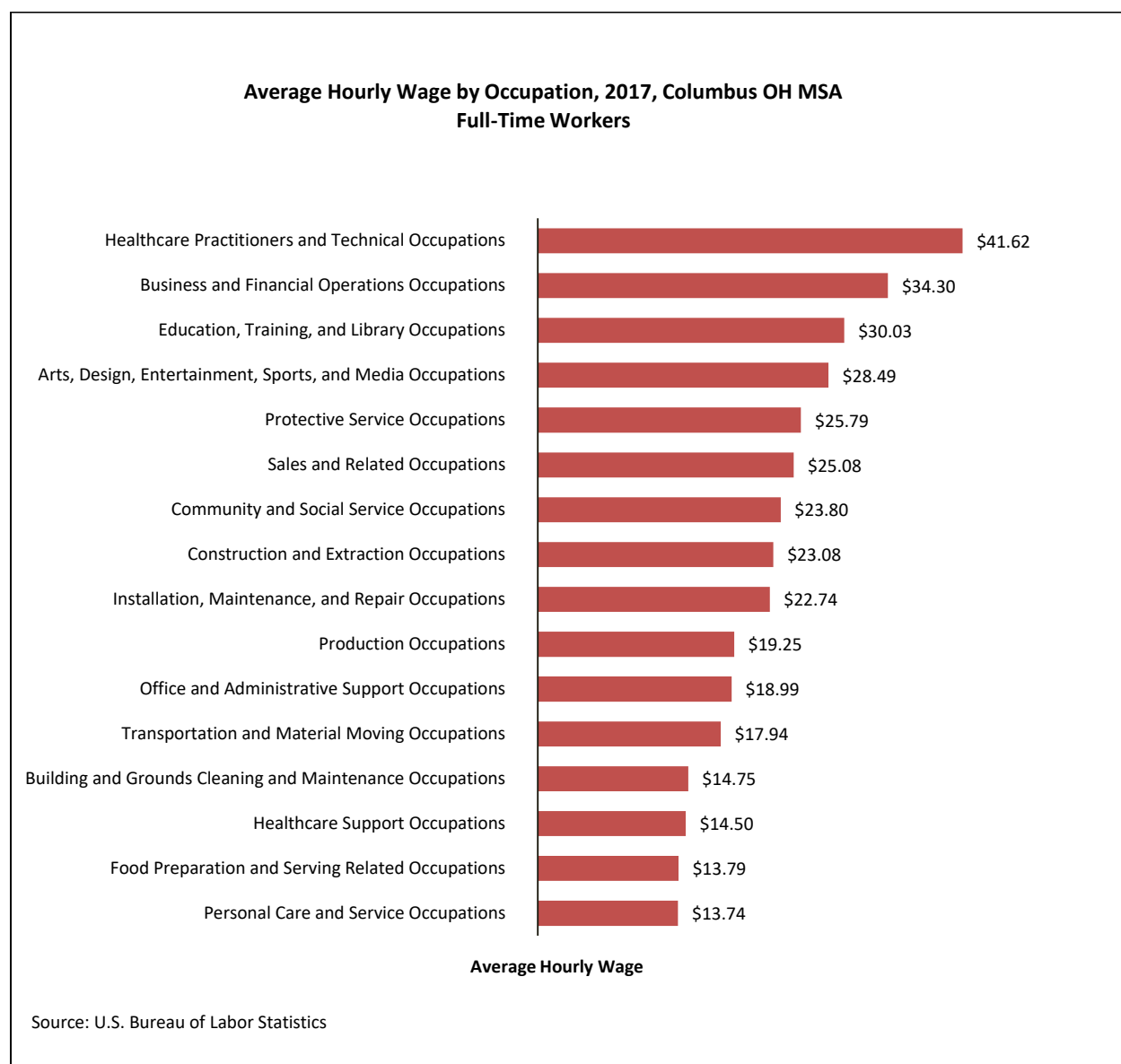
IPUMS

PolicyLink/PERE National Equity Atlas, www.nationalequityatlas.org

Median annual earnings in all industries were \$47,128 in 2017,¹⁰ with 10 industries providing better earnings than the median, including mining, utilities, professional and technical services, management of companies and enterprises, public administration, finance and insurance, and information. The most notable wage variations occur for full-time jobs in the Healthcare Practitioners and Technical Occupations, and Protective Service Occupations, which range between \$3.03 and \$4.48 more per hour

¹⁰ American Community Survey, five-year estimates for 2017.

than in the Cleveland, Cincinnati, or Toledo MSAs. However, other jobs, such as Healthcare Support Occupations, adjust the industry wage down due to lower hourly wages on average than even other Ohio MSAs, ranging from \$0.05 to \$0.99 lower.



People Strengths Wrap

On the surface, the region has recovered well from a recession and is forecasted to continue to grow. Even with the successes, three issues indicate a need:

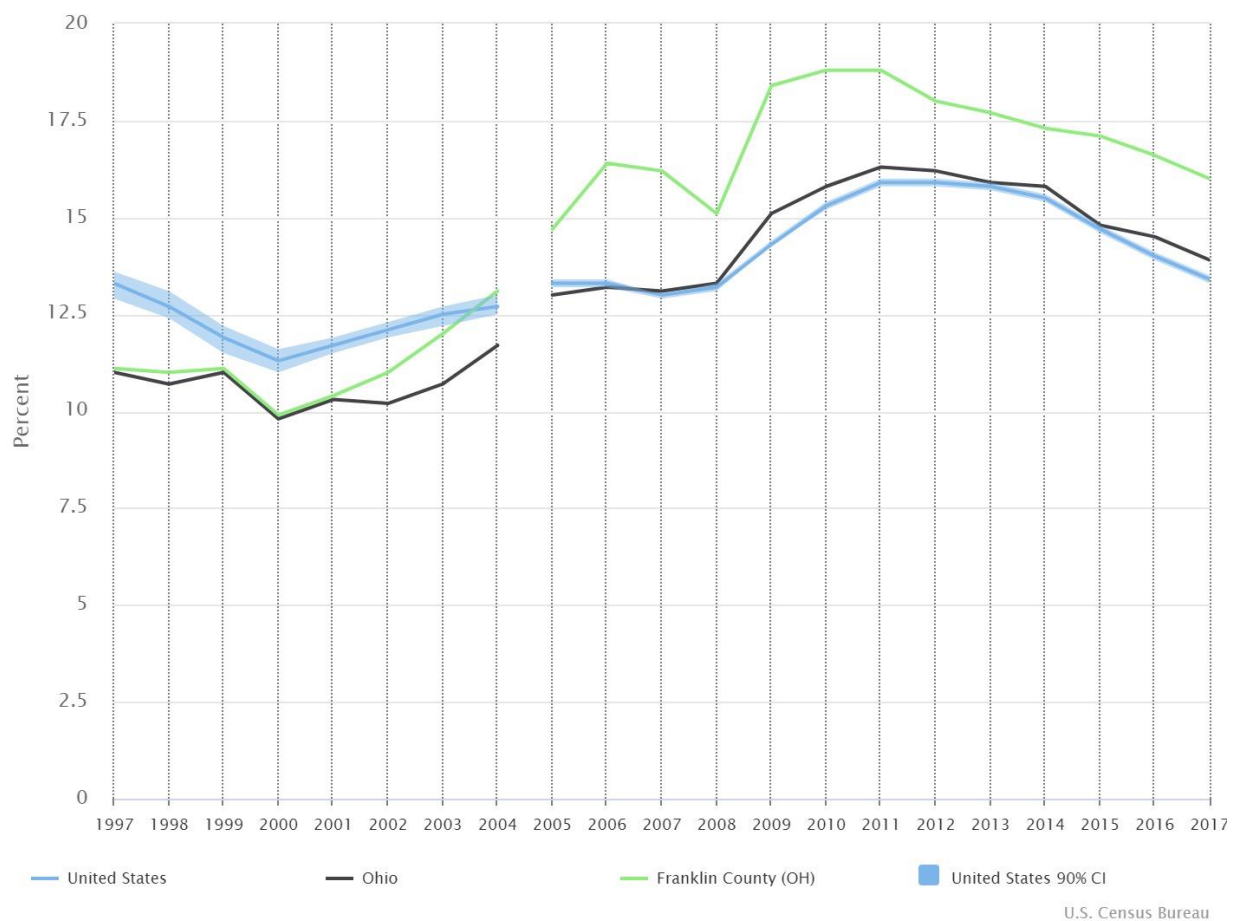
- Shoring up the population's educational attainment across a diverse population will be critical to maintaining economic opportunity and fueling industry's need for an educated labor.
- The disparities of rising wages by skill, race, ethnicity, and job type limit economic opportunity.

- Lower labor force participation of a productive segment of the population limits economic returns in the region.

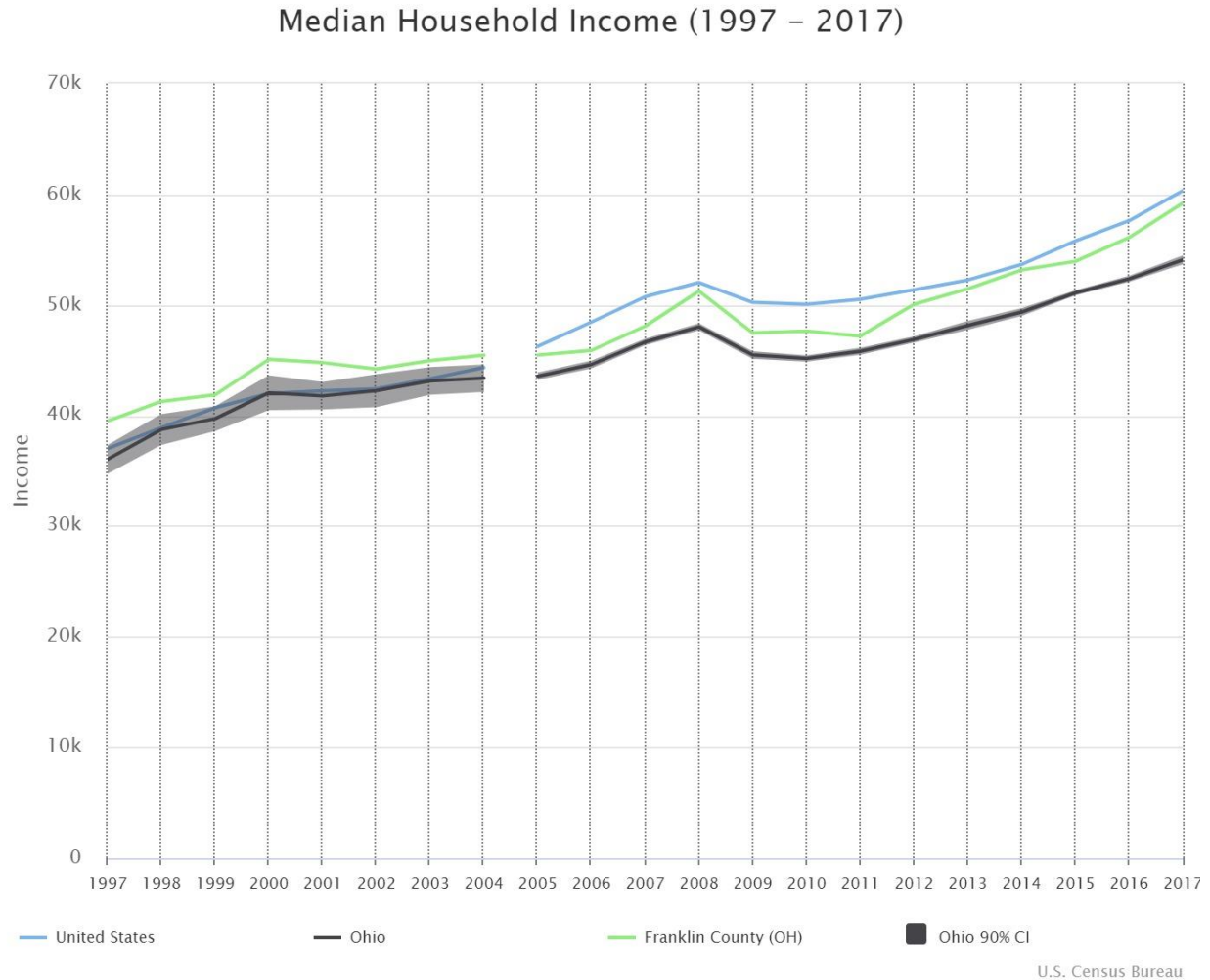
Weakness: People

Although the economy is providing positive results in the aggregate, digging below the surface indicates a number of weaknesses for people capacity. The comparison of a declining unemployment rate to the poverty rate and median household income over time suggests an inequitable challenge. Franklin County's poverty rate surpassed the state's average after 2001 and the U.S. average in 2003, and its median household income fell below the U.S. average in 2005.¹¹

All Ages in Poverty (1997 – 2017)



¹¹ US Census Bureau, "Small Area Income & Poverty Estimates (SAIPE)," accessed February 23, 2019, https://www.census.gov/data-tools/demo/saie/saie.html?s_appName=saie&map_yearSelector=2017&map_geoSelector=mhi_c&s_state=39&s_county=39049&s_measures=aa_snc&menu=trends.



Although the Columbus region is the fourth fastest growing city in the U.S.,¹² it is also the second most economically segregated in the country,¹³ ranking 8th among large metropolitan areas for overall income segregation, fourth for segregation of people with college degrees, and 10th for segregation of working class people.¹⁴ The wealthy live in wealthy neighborhoods and the poor in poor neighborhoods. The groups interact much less, and the resulting impacts on health, housing, transportation, and income are more negative in poor neighborhoods. The degree of economic segregation can greatly limit movement from low to middle class.¹⁵

¹² Walker Evans, "Census: Columbus Is the 4th Fastest-Growing Big City in the US," accessed February 8, 2019, <https://www.columbusunderground.com/census-columbus-is-the-4th-fastest-growing-big-city-in-the-us-we1>.

¹³ Richard Florida and Charlotta Mellander, "Segregated City: The Geography of Economic Segregation in America's Metros," accessed February 8, 2019, <http://martinprosperity.org/media/Segregated%20City.pdf>.

¹⁴ Gabe Rosenberg, "Same City, Different Worlds," *Chasing the Dream* (blog), November 6, 2017, <https://www.pbs.org/wnet/chasing-the-dream/stories/city-different-worlds/>.

¹⁵ Rosenberg.

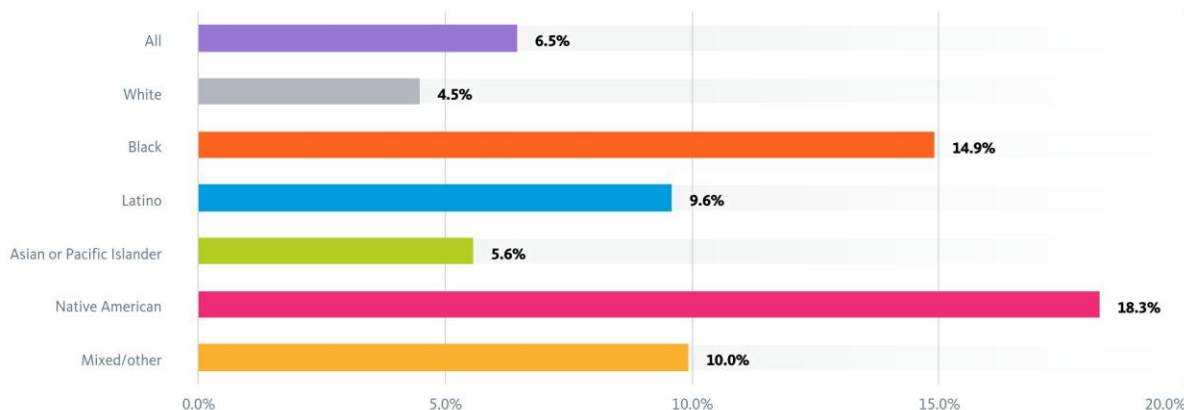
Poverty

The depth of the recession and its inequitable recovery should be a critical concern in the region, and the recent report that the City of Columbus per-capita income-tax collections were lower for the first time since it increased the tax rate in 2009 serves further notice.¹⁶ The Franklin County Commissioners took note and called for a study of poverty in 2018 to understand its effect and its persistence.¹⁷ Although the 2016 poverty rate at 16.7% has declined in the region from 2010-2016, it is incessant in communities of color and low-income communities. The Kirwan Institute's poverty analysis (see appendix) indicates that the suburbanization of poverty since 1980 has not lessened in many of the urban core neighborhoods.¹⁸ The only reduction in poverty rates in the urban core is where gentrification is evident.

Neighborhood poverty in Columbus diminishes residents' connections to opportunities. In 2015, the White population had the lowest concentration of people living in high poverty neighborhoods at 4.49 percent, and the Native American population had the highest at 18.26 percent followed by Blacks at 14.9% and Latinos at 9.6%. Life in high-poverty neighborhoods has implications of having less:

- access to jobs, services;
- high-quality education;
- parks, safe streets; and
- other essential ingredients of economic and social success.

Percent living in high-poverty neighborhoods by race/ethnicity: Columbus, OH Metro Area, 2015



U.S. Census Bureau; GeoLytics, Inc.
PolicyLink/PERE National Equity Atlas, www.nationalequityatlas.org

¹⁶ Rick Rouan, "Columbus' Income Tax Revenue Not Keeping up with Population Growth," *The Columbus Dispatch*, March 4, 2019, <https://www.dispatch.com/news/20190304/columbus-income-tax-revenue-not-keeping-up-with-population-growth>.

¹⁷ Kimball Perry, "Franklin County Studying Ways to Solve 'alarming' Poverty," accessed February 22, 2019, <https://www.dispatch.com/news/20180416/franklin-county-studying-ways-to-solve-alarming-poverty>.

¹⁸ Michael Outrich, Mikyung Baek, and Glennon Sweeney, "Franklin County Poverty Analysis" (Kirwan Institute for the Study of Race and Ethnicity, 2018), 40–44.

Within the Columbus region, Franklin County has the greatest concentration of working residents also living in poverty. Franklin County has 20 individual census tracts where the poverty rate for employed individuals exceeds 25%,¹⁹ and wealth is also the lowest in these tracts. The correlation of wealth and long-term economic improvement are well known; focusing on asset building that can result in wealth generation is one of the most potent solutions to combatting persistent poverty.

Poverty's Dynamic Impacts

The high rates of poverty have long-term implications, and its own life cycle, whether it is episodic, short term, or lacking liquid assets to stay out of poverty for three months. The lack of wealth and poverty has perpetual dynamic interactions with mobility, housing, health, and education. Almost half of the renters pay over 30% of their household income in rent, and the majority of renter occupied units is located in higher poverty areas. Yet only 18.2% of homeowners are under similar cost and severely-cost-burdened situations. The Kirwan Institute's poverty analysis indicates that home values are highly associated with race; concentrated poverty and incarceration are heavily associated with race, poverty, income, and wealth (see appendix).²⁰ Franklin County has five of the 26 areas within the City and County that have both a poverty rate of 40% or more and a non-white population of 50% or more—considered racially or ethnically concentrated areas of poverty (R/ECAPs).²¹

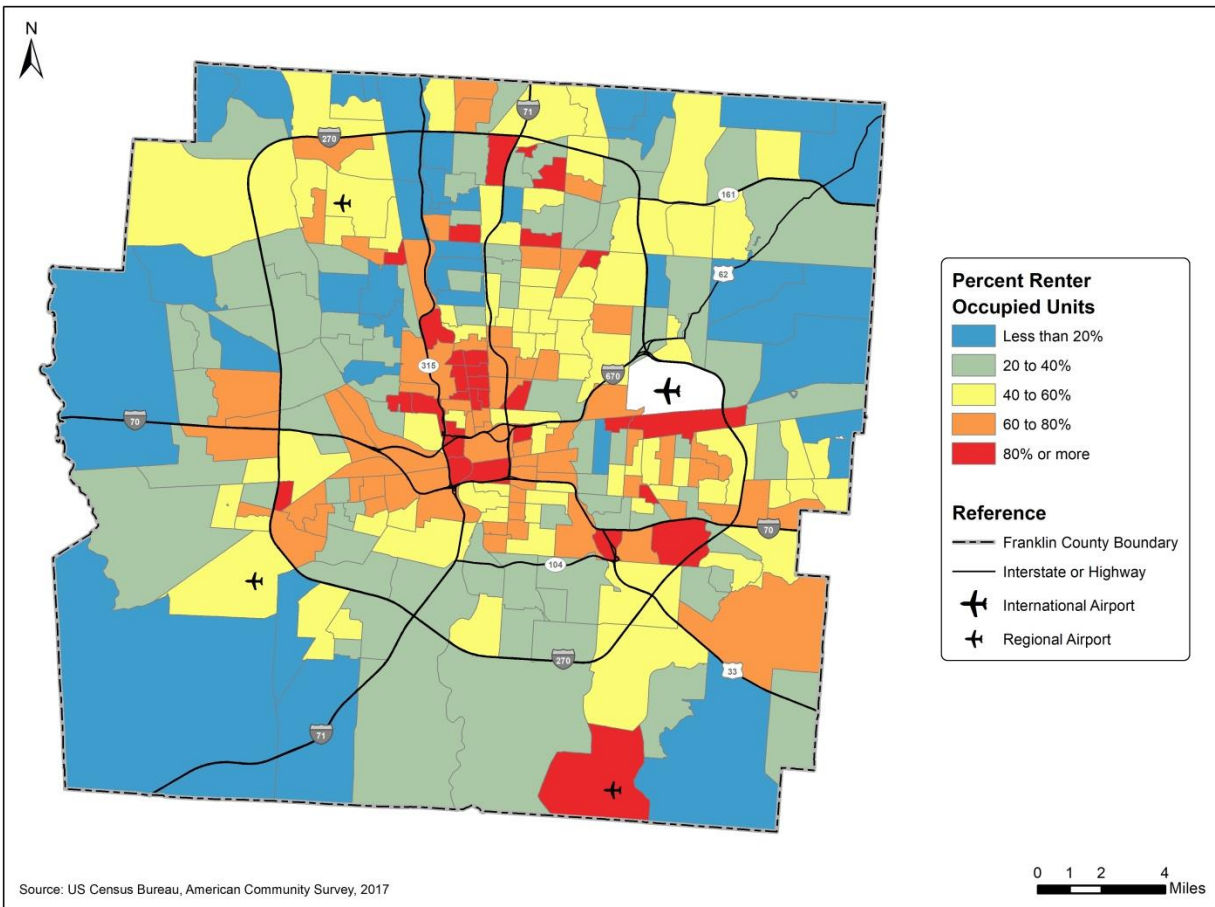
Housing Costs as a Percent of Household Income, 2012 and 2017					
Share of Renter Households					
		Franklin County, OH		Columbus, OH MSA	
Rent as a Percentage of Household Income		2017	2012	2017	2012
	<30%	54.3%	52.3%	55.9%	52.2%
	30-49% (cost burdened)	24.5%	23.2%	23.4%	23.6%
	50%+ (severely cost burdened)	21.2%	24.5%	20.7%	24.2%
Total Renter Households		100.0%	100.0%	100.0%	100.0%
Source: U.S. Census Bureau, 1-Year American Community Survey Table B25070					

¹⁹ Avalanche Consulting, "Regional Economic Development Assessment: Report 1: Economic Assessment and Community Benchmarking," 82.

²⁰ Michael Outrich, Mikyung Baek, and Glennon Sweeney, "Franklin County Poverty Analysis" (Kirwan Institute for the Study of Race and Ethnicity, 2018), 30.

²¹ Mosaic Community Planning, "City of Columbus and Franklin County Joint Analysis of Impediments to Fair Housing Choice," February 2019.

Housing Costs as a Percent of Household Income, 2012 and 2017					
Share of Owner Households		Franklin County, OH		Columbus, OH MSA	
Owner Households		2017	2012	2017	2012
	<30%	81.8%	76.3%	82.7%	76.8%
	30-49% (cost burdened)	11.2%	15.7%	10.9%	15.3%
	50%+ (severely cost burdened)	7.0%	8.0%	6.4%	7.8%
Total Owner Households		100.0%	100.0%	100.0%	100.0%
Source: U.S. Census Bureau, 1-Year American Community Survey Table B25091					



The inter-dynamics of housing, income, and poverty in Franklin County since the recession exhibit the distinct burden that people of color face with higher poverty rates. Of note is the increasing poverty rate for the Asian population that may be a key insight into the current demographic change in the Asian

population. The wave of immigration from Asia is more diverse and less financially able than earlier waves. The inequitable distribution is similar for income and correlate with the lower homeownership rates of people of color.

Housing and Income Characteristics by Race and Ethnicity, 2012 and 2017						
	Franklin County, OH		Columbus City, OH		Columbus OH MSA	
	2017	2012	2017	2012	2017	2012
Median Household Income						
White	\$68,321	\$55,506	\$60,698	\$49,637	\$69,985	\$58,172
Black/African-American	\$37,805	\$32,391	\$35,770	\$32,101	\$39,898	\$34,197
Asian	\$65,806	\$69,495	\$51,678	\$56,329	\$74,700	\$70,205
Multi-racial	\$44,026	\$27,496	\$37,433	\$30,945	\$46,567	\$35,346
Hispanic or Latino	\$45,636	\$32,433	\$42,264	\$31,737	\$45,965	\$35,682
Homeownership Rate						
White	61%	61%	51%	52%	68%	67%
Black/African-American	34%	32%	34%	32%	36%	34%
Asian	43%	42%	38%	33%	50%	49%
Multi-racial	33%	36%	28%	34%	37%	44%
Hispanic or Latino	31%	23%	28%	22%	35%	29%
Poverty Rate						
White	11%	13%	14%	16%	10%	12%
Black/African-American	27%	33%	29%	34%	26%	32%
Asian	20%	14%	24%	17%	16%	12%
Multi-racial	24%	27%	26%	27%	22%	23%
Hispanic or Latino	31%	27%	31%	30%	28%	24%
Source: U.S. Census Bureau, 1-Year American Community Survey, Tables B19013, B25003, B17001						

A correlation of poverty and education is also present. Two-thirds of Franklin County's school districts' score an overall grade of C or above on the Ohio School District Report cards; however, several of lower performing schools are located in census tracts that have elevated, concentrated, or extremely concentrated poverty.²² The Kirwan Institute's poverty analysis exhibited that school performance is associated with neighborhood poverty rates in Columbus, Whitehall, and Southwestern school districts—the latter two being the only suburban districts with poor performance.²³

²² Reynoldsburg City, South-Western City, and Whitehall City

²³ Outrich, Baek, and Sweeney, "Franklin County Poverty Analysis," 52.

Ohio School District Report Cards, 2017-2018			
Grade			
DISTRICT NAME		COUNTY	OVERALL GRADE
	Bexley City	Franklin	A
	New Albany-Plain Local	Franklin	A
	Dublin City	Franklin	B
	Gahanna-Jefferson City	Franklin	B
	Grandview Heights Schools	Franklin	B
	Upper Arlington City	Franklin	B
	Worthington City	Franklin	B
	Groveport Madison Local	Franklin	C
	Hamilton Local	Franklin	C
	Hilliard City	Franklin	C
	Westerville City	Franklin	C
	Canal Winchester Local	Franklin	D
	Reynoldsburg City	Franklin	D
	South-Western City	Franklin	D
	Whitehall City	Franklin	D
	Columbus City School District	Franklin	F
Source: Ohio Department of Education			

A comparison of the poverty measure to both the self-sufficiency wage and living wage for the region exhibits poverty's dynamics and impact on equity in the region's labor market. The poverty measure²⁴ doesn't include work-related expenses such as child care, taxes, and transportation. However, the other measures incorporate these expenses. The self-sufficiency wage calculates the income needed to meet the basic needs of a particular family type.²⁵ The living wage²⁶ is another alternative measure of basic needs.²⁷

²⁴ Poverty measure is calculated for a two-parent household with a stay-at-home parent, or single parents relying on welfare or family support.

²⁵ The Self-Sufficiency Standard reflects modern family practices, and assumes that all adults (whether married or single) work full-time. Thus the Standard includes the employment-related costs of transportation, taxes, and child care (when needed). See: <http://www.selfsufficiencystandard.org/the-standard>. Family type includes number of adults and number and age of children. Measure includes the costs of six basic needs plus taxes and tax credits. It assumes the full cost of each need, without help from public subsidies (e.g., public housing, Medicaid, or child care assistance) or private/ informal assistance (e.g., unpaid babysitting by a relative or friend, food from food banks, or shared housing). Ohio Association of Community Action Agencies, "Self-Sufficiency Calculator," July 31, 2015, <http://oacaa.org/self-sufficiency-calculator/>.

Franklin County Wage Comparison		
Hourly Wages	1 Adult	2 Adults (1 Working) 1 Child
Minimum Wage	\$ 8.30	\$ 8.30
Poverty Wage	\$ 5.84	\$ 9.99
Self-Sufficiency Wage	\$ 9.89	*\$13 for infant, \$12.09 preschool, \$10.73 school age, \$8.46 teenager
Living Wage	\$ 11.24	\$ 21.84
Sources: ACS 2015; http://oaca.org/self-sufficiency-calculator/ ; http://livingwage.mit.edu/counties/39049 .		
*Amount is per adult.		

Alongside living/self-sufficiency wages, the wages by race then by education indicate the burdened population (see under [wages](#) above in strength section).²⁸ Of the Columbus region's full-time workers with a high school diploma but no college, White workers had the highest median wage at \$17 per hour while Latino workers had the lowest at \$13 per hour. The lack of a high school diploma for Blacks and Latinos result in the lowest hourly wage at \$10 per hour, close to both the living/self-sufficiency wage for a single adult. If regional wages were equitable, they would only reflect differences in education, training, experience, and pay scales in particular occupations and industries; they should not vary systematically by race or gender. Since the region has higher growth of low-wage jobs than those of high-wage,²⁹ people of color are bearing the burden of inequitable wages and are the largest share of working poor—where 25.3% of Latino and 16% of both People of Color and Black adults working full-time are living below 200% of the poverty level as compared to only 6.58 percent of White adults.

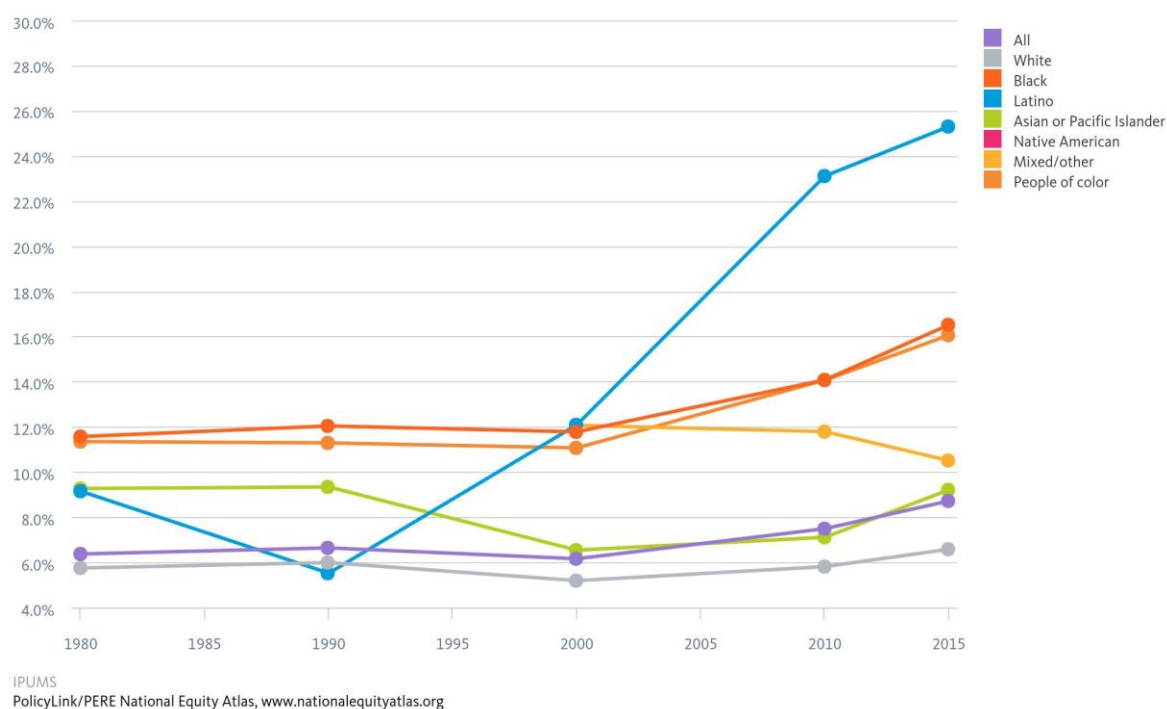
²⁶ Amy K. Glasmeier, "Living Wage Calculator: Living Wage Calculation for Franklin County, Ohio," accessed February 22, 2019, <http://livingwage.mit.edu/counties/39049>.

²⁷ It is a market-based approach that draws upon geographically specific expenditure data related to a family's likely minimum food, childcare, health insurance, housing, transportation, and other basic necessities (e.g. clothing, personal care items, etc.) costs. The living wage draws on these cost elements and the rough effects of income and payroll taxes to determine the minimum employment earnings necessary to meet a family's basic needs." Carey Anne Nadeau, "Living Wage Calculator User's Guide: Technical Notes 2017 Update," 2017, <http://livingwage.mit.edu/resources/Living-Wage-User-Guide-and-Technical-Notes-2017.pdf>.

²⁸ PolicyLink/PERE, "National Equity Atlas."

²⁹ See growing good jobs chart in the strength of job growth section of people capacity.

Percent working poor by race/ethnicity: Columbus, OH Metro Area, 200%, 1980-2015



Regional Workforce System

Workforce Education Levels and Preparation

The region's workforce system is challenging, particularly for the not prepared or disadvantaged population. Future jobs will require ever-higher levels of skills and education; since the recession 99 percent of all jobs created now require more than a high school education.³⁰ The talent of this workforce is described as a factor of strength above, yet with only 24% of the over 25 year old population having a BA degree, a majority of the workforce faces a lack of education that leads to better job quality—from wages to a career path. According to Columbus 2020's strategy, only 8.2% of the people in the region have associate degrees.³¹ This is troubling given varying estimates indicate by 2020, 33% of Ohio's jobs will require some college, an associate's degree, or a postsecondary vocational certificate,³² and 41% of jobs will require at least an AA degree or higher. Current educational attainment of Columbus workers of color also needs improvement given that they are a growing share of the workforce.³³

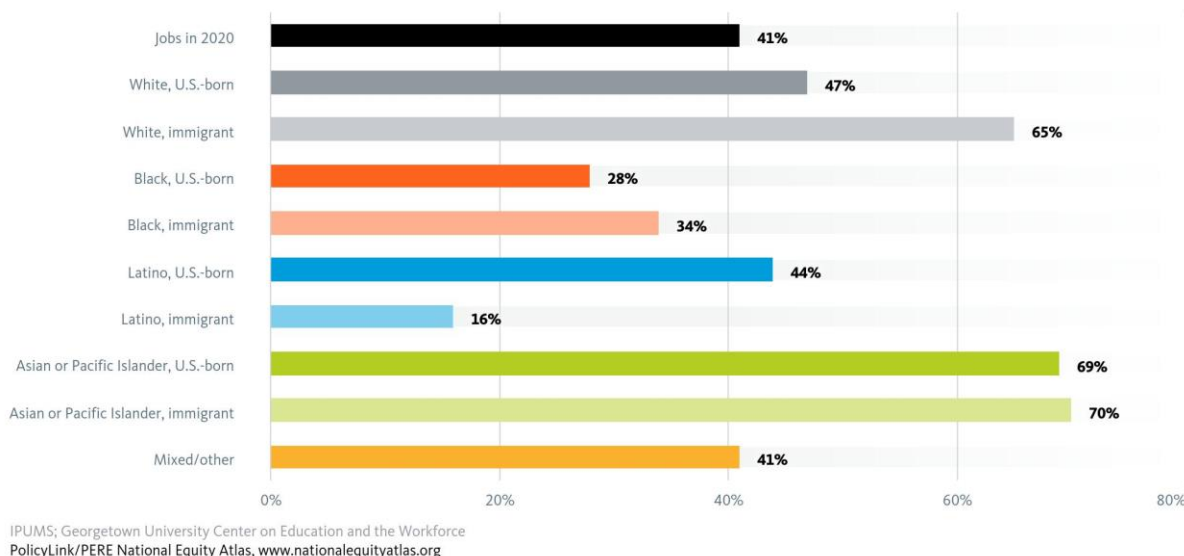
³⁰ Anthony P. Carnevale, Nicole Smith, and Jeff Strohl, "Recovery: Job Growth and Education Requirements Through 2020" (Center on Education and the Workforce, 2013), https://1gyhoq479ufd3yna29x7ubjn-wpengine.netdna-ssl.com/wp-content/uploads/2014/11/Recovery2020.FR_Web_.pdf.

³¹ Avalanche Consulting, "Regional Economic Development Assessment: Report 1: Economic Assessment and Community Benchmarking," 30.

³² Anthony P. Carnevale, Nicole Smith, and Jeff Strohl, "Recovery Projections of Jobs and Education Requirements Through 2020" (Washington, D.C.: Georgetown Public Policy University Center on Education and the Workforce, June 2013), 5, https://cew.georgetown.edu/wp-content/uploads/2014/11/Recovery2020.SR_Web_.pdf.

³³ PolicyLink/PERE, "National Equity Atlas."

Current educational attainment and projected state/national-level job education requirements by race/ethnicity and nativity: Columbus, OH Metro Area, AA degree or higher, 2015

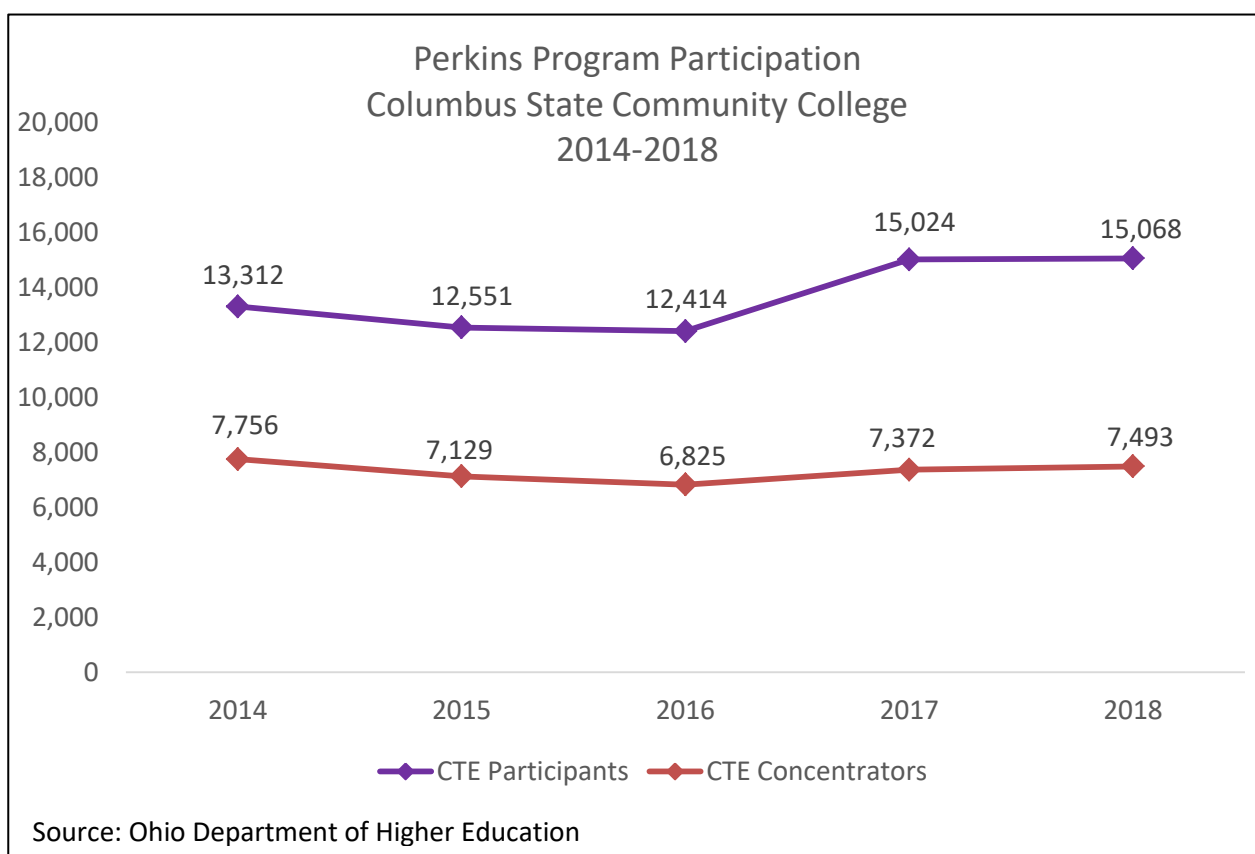


The effect of lower educational attainment reverberates in Franklin County, where the disparity in labor force participation rates is most severe. Franklin County has three of the 10 census tracts in the Columbus region with the lowest attainment.³⁴ Workforce Innovation and Opportunity Act in Franklin County data highlight a few issues. Although there was an increase in both the participation of adults and dislocated workers, the percentage of youth participants decreased, which hints to surfacing issues around the future pipeline of workers.

WOIA Participation: Number of Participants, 2014-2015								
Franklin County								
Program Year	Adult	YoY Chg	Dislocated Worker	YoY Chg	Youth	YoY Chg	Total	YoY Chg
2014	817		270		541		1,628	
2015	922	12.9%	451	67.0%	300	-44.5%	1,673	2.8%
State of Ohio								
Program Year	Adult	YoY Chg	Dislocated Worker	YoY Chg	Youth	YoY Chg	Total	YoY Chg
2014	13,333		6,144		7,514		26,991	
2015	10,062	-24.5%	4,995	-18.7%	5,629	-25.1%	20,686	-23.4%
Source: Ohio Department of Jobs and Family Services								
YoY Chg: Year over year change								

³⁴ Avalanche Consulting, "Regional Economic Development Assessment: Report 1: Economic Assessment and Community Benchmarking," 17.

The Perkins Loan program further emphasizes the worker pipeline. After declining between 2014 and 2016, the overall participation in the Perkins Loan program did increase for Career and Technical Education (CTE), and concentrations were up 10% since 2016. The completion of CTE credentials needs to be a priority because economic success is greater with a credential—even among those from “disadvantaged”³⁵ backgrounds where work-based learning and earning of sub-baccalaureate credentials result in higher-quality job potential.³⁶



Fragmented Workforce System Approach

Currently, workforce stakeholders see disconnections between jobs that are open and workers who can fill jobs. The perception is that employers “keep moving the bar” such that trained workers never seem to meet the criteria to be hired. During a recession where there is high unemployment, employer requirements do tend to be higher than when unemployment is low. In fact, recruitment intensity and

³⁵ “Disadvantaged adolescents” are as those who, when they were between the ages of 12 and 18, had a family income equal to or less than 200 percent of the federal poverty line; did not have a parent with more than a high school education; had a mother who was a teenager when her first child was born; or whose family received public assistance. Job quality is based on four factors: earnings, benefits, hours of work, and job satisfaction.

³⁶ Martha Ross et al., “Pathways to High-Quality Jobs for Young Adults,” n.d., 56.

upskilling—taking more steps and time to recruit and requiring higher levels of educational-related requirements—“was greater in areas where the unemployment rate rose more dramatically and the decrease was larger in areas where the unemployment rate fell more swiftly during the recovery.”³⁷ Franklin County definitely fits the description with unemployment increasing almost 6% in 2008 to 2010, but taking five years to return to pre-recession level.

Workforce policy must recognize the dynamic demand for workers and responsiveness to labor market conditions. Employers will strategically move to hiring higher-skilled workers when they are plentiful. However, the Columbus workforce system’s design of education and training programs is not prepared for cyclicity.³⁸ Workforce leaders need to engage employers to understand their upskilling and recruitment intensity processes and discuss how these impact successful recruitment and hiring time lines and their businesses’ ability to grow.

The narrative of industry being impatient and not able to fill immediate needs is a signal that there is low recognition of dynamic labor market changes and job readiness. In order to create more a more accountable system, the current fragmented system requires collective participation of all workforce development providers (community colleges and nonprofit providers) alongside employers to achieve greater integration, collaboration, and ownership of specific objectives. The workforce development system needs:

- strong leadership;
- improved data on current job trends and qualifications to more quickly respond to reflect the in-demand jobs and changing job requirements;
- assessment of job centers related to workforce quality and mobility issues; and
- assessment of job services hubs’ locations and greater “marketing” to the underserved and unserved that are hard to reach.

Franklin County could facilitate with integrating employers and collecting better data on jobs and location needs. Addressing the labor market’s future requires understanding current jobs, their location, and the upskilling pathway for these jobs. For example, the primary jobs held by residents of Franklin County in 2016 are most commonly in job groups that are Management, Business, Science, & Arts, Sales & Office, and Service.³⁹ Yet, the jobs by industry show that more than one out of every six jobs in Franklin County is in the Health Care and Social Assistance industry, making it the largest and fastest growing industry in the County, nearly triple the second fastest growing industry, transportation and warehousing. The other fast growing sectors include Accommodation and Food Services, Construction, and Transportation and Warehousing, which collectively account for a quarter of all new jobs over the

³⁷ Alicia Sasser Modestino and Daniel Shoag, “Research: When the Economy Is Good, Employers Demand Fewer Credentials,” *Harvard Business Review*, August 21, 2018, <https://hbr.org/2018/08/research-when-the-economy-is-good-employers-demand-fewer-credentials>.

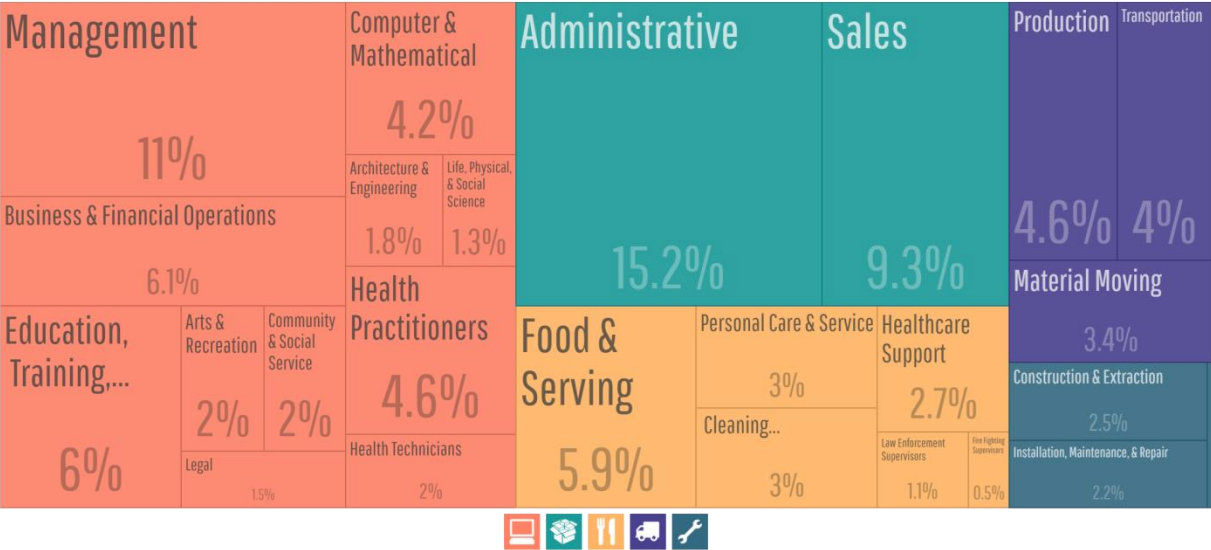
³⁸ Modestino and Shoag.

³⁹ Data USA, “Franklin County, OH,” Data USA, accessed February 22, 2019, <https://datausa.io/profile/geo/franklin-county-oh/#economy>.

past five years.

Employment by Occupations in Franklin County, Oh

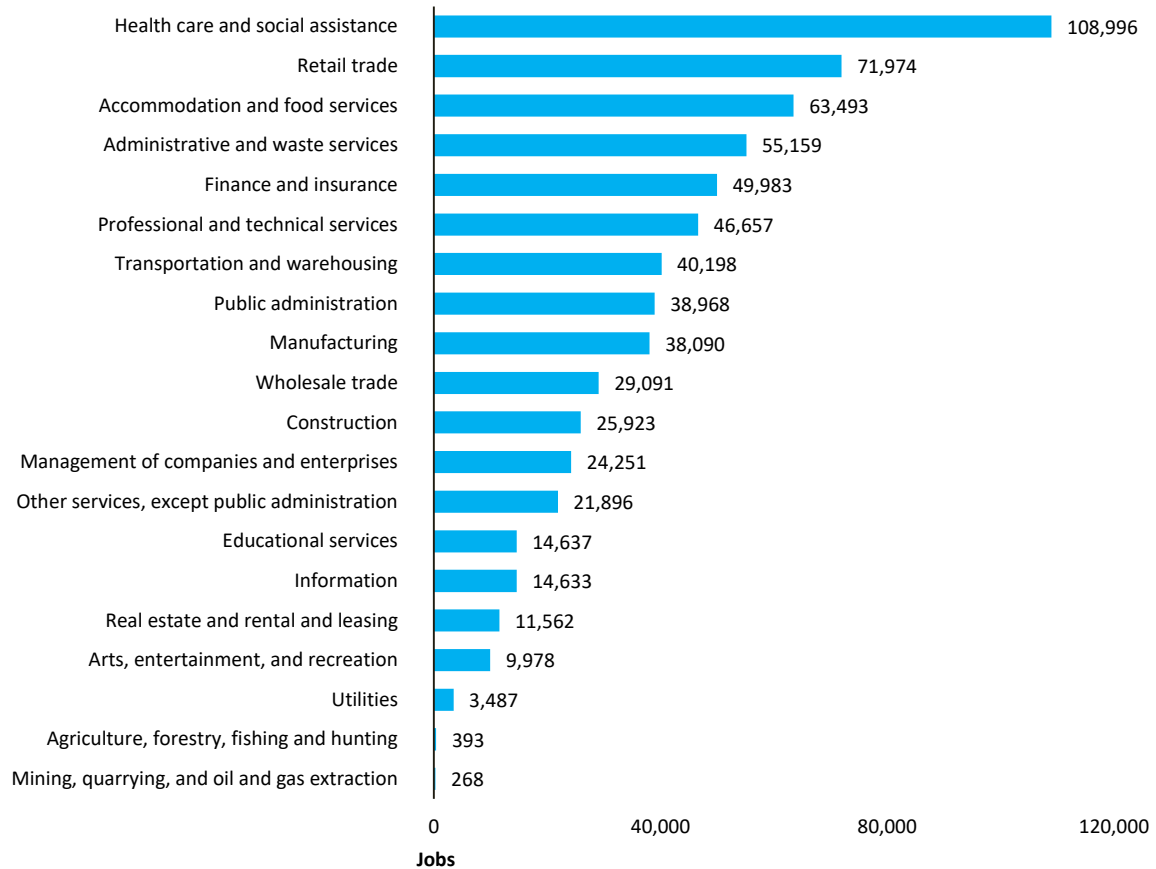
The closest comparable data for the county of Franklin County, OH is from the state of Ohio.



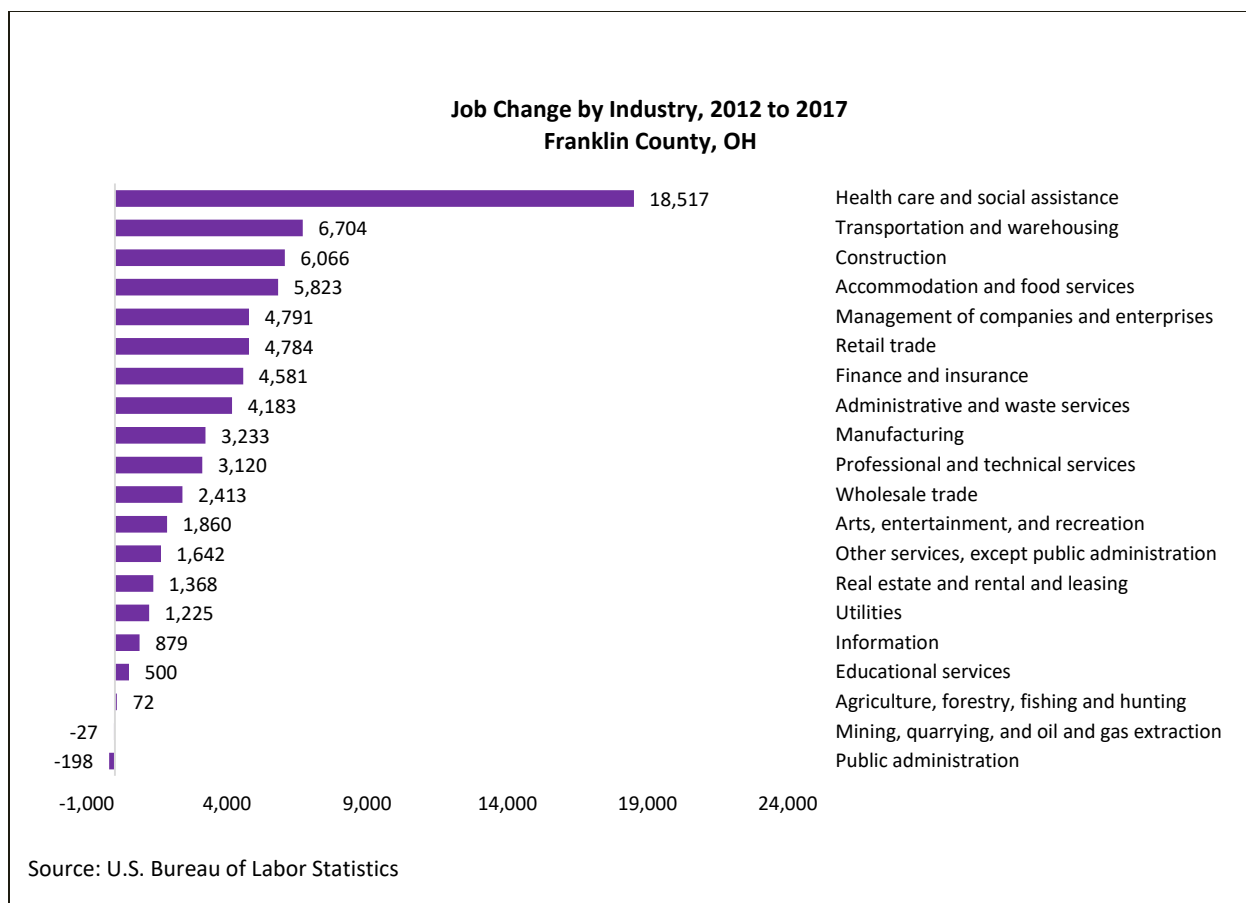
Dataset: ACS 1-year Estimate
Source: Census Bureau

DATA USA:

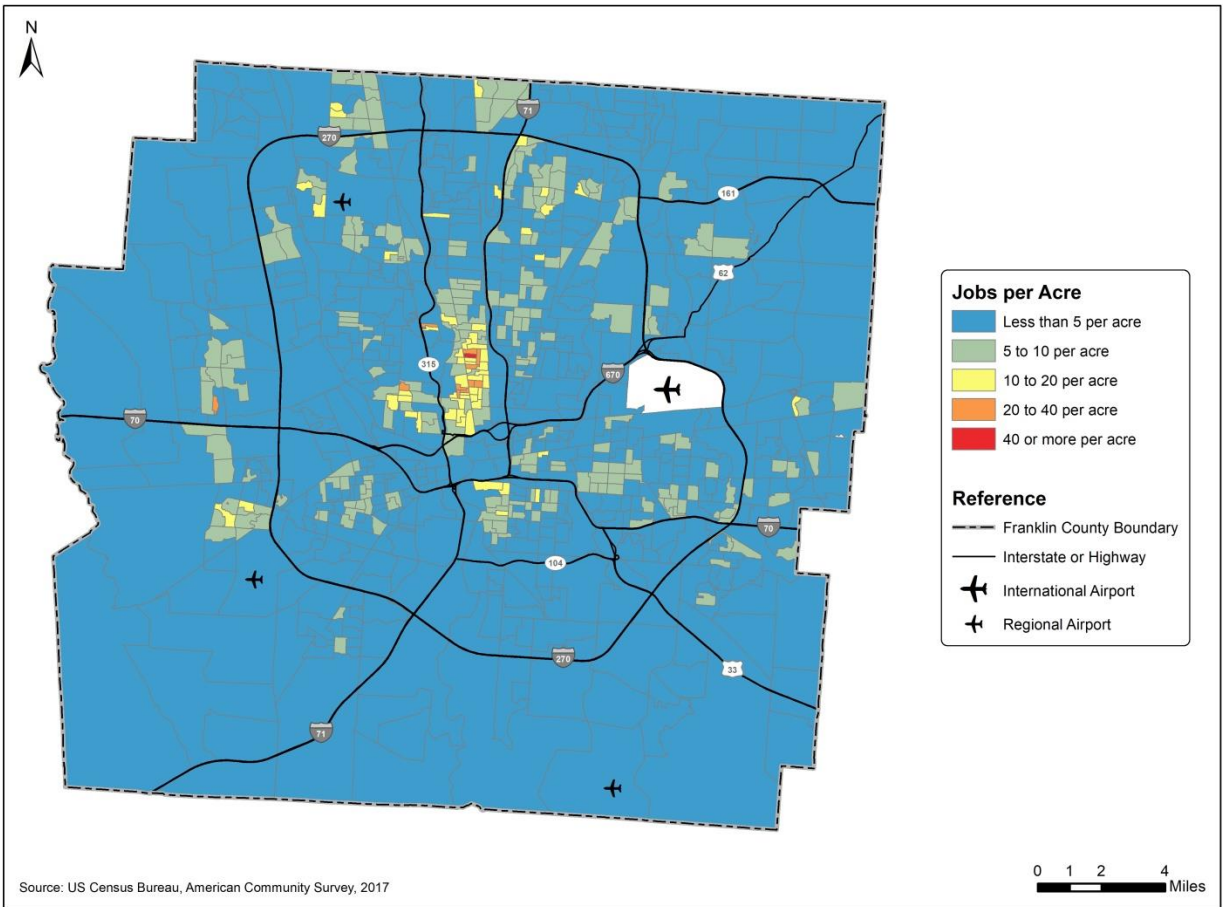
Jobs by Industry, 2017, Franklin County OH

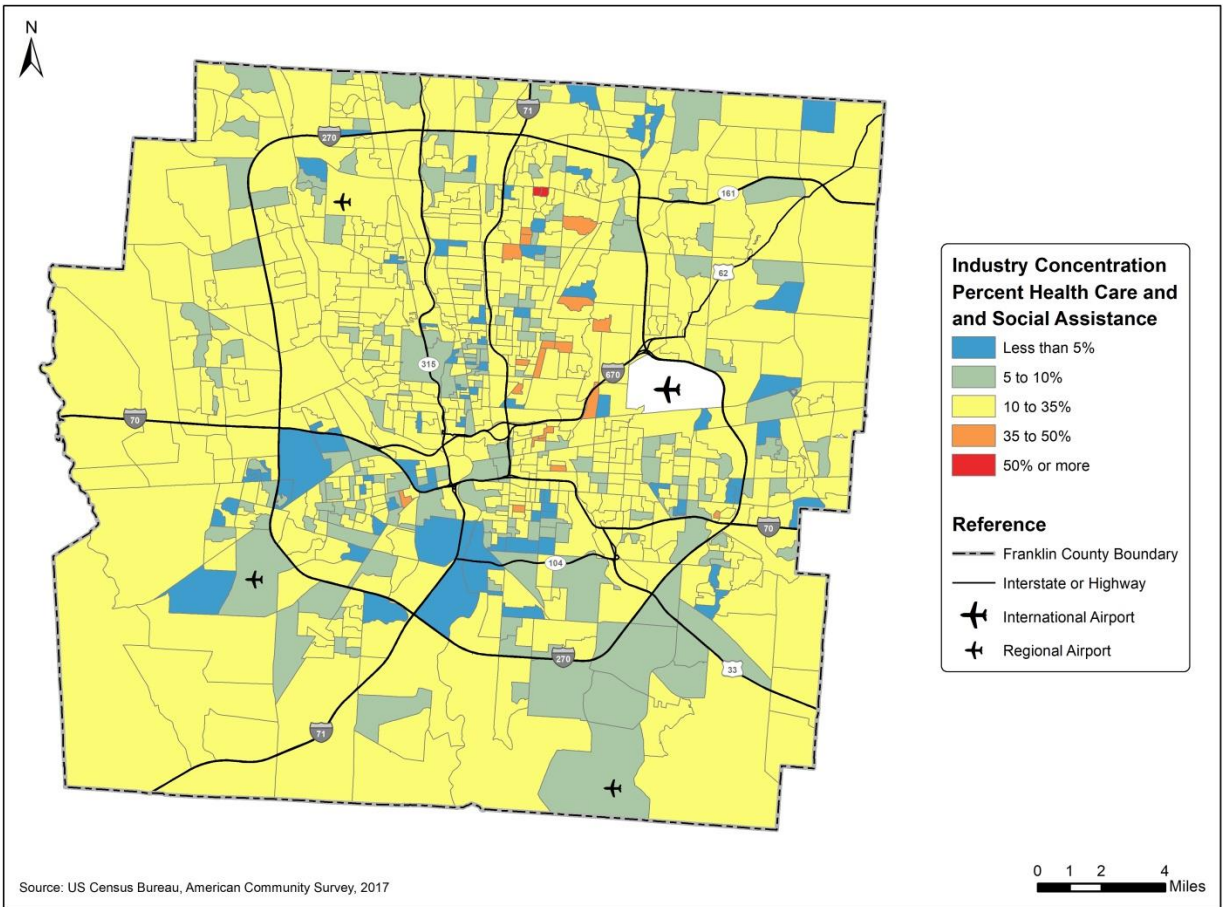


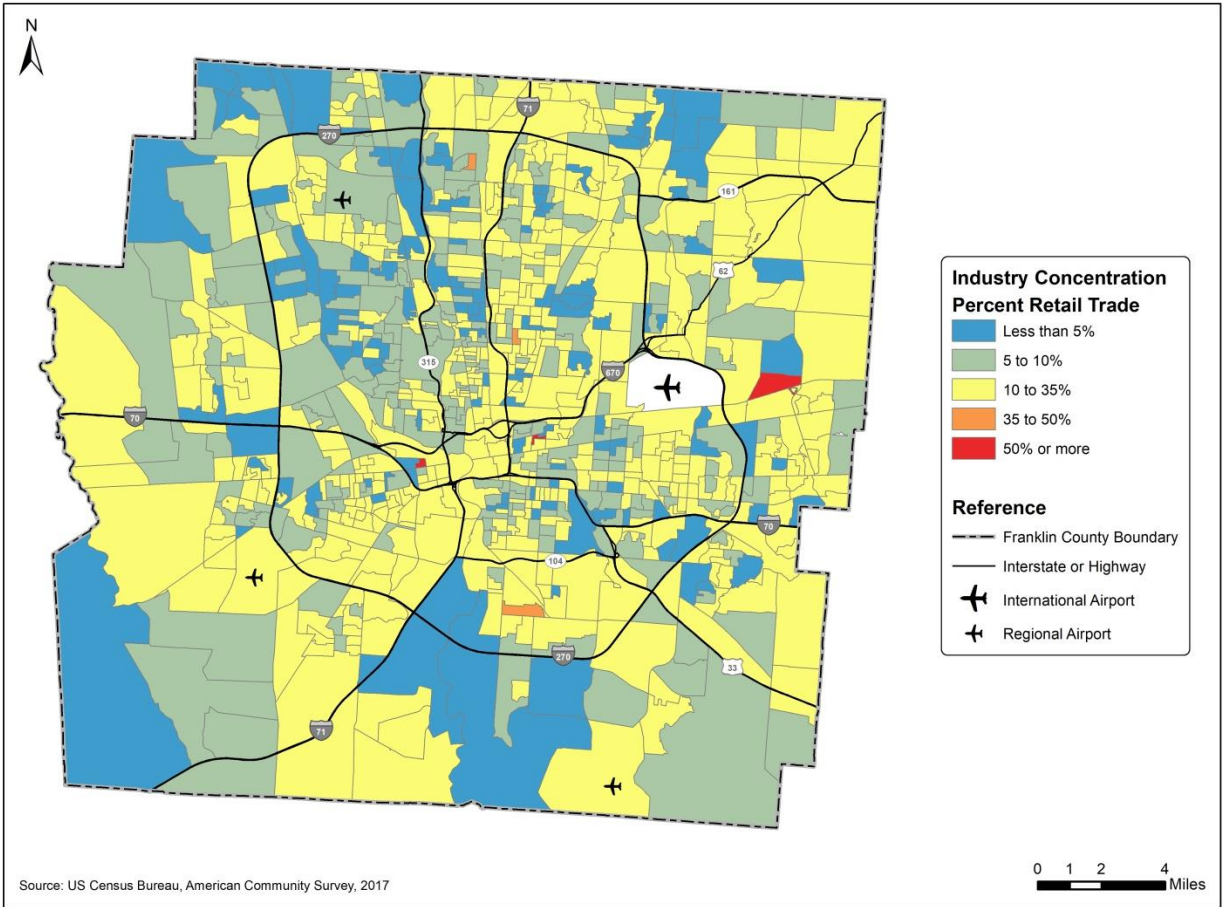
Source: U.S. Bureau of Labor Statistics

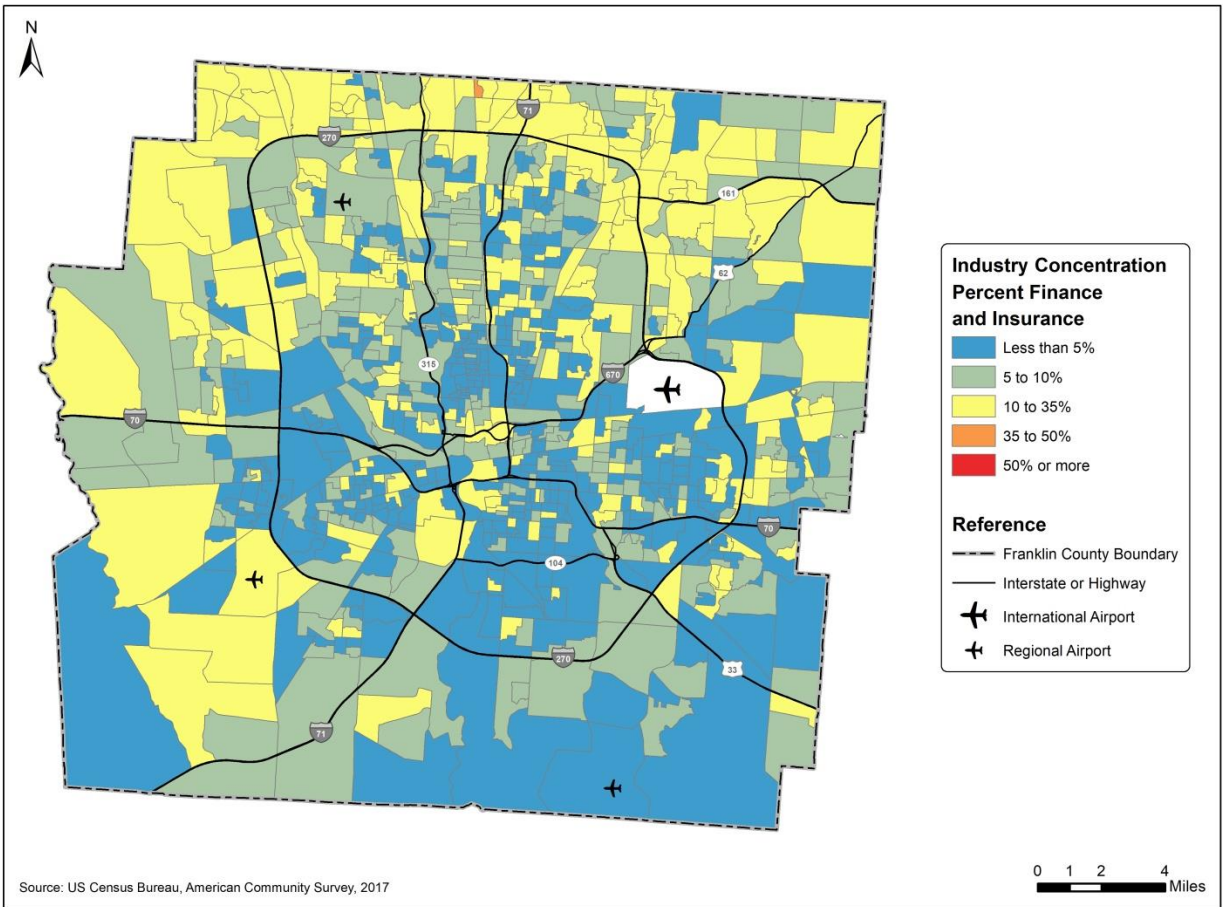


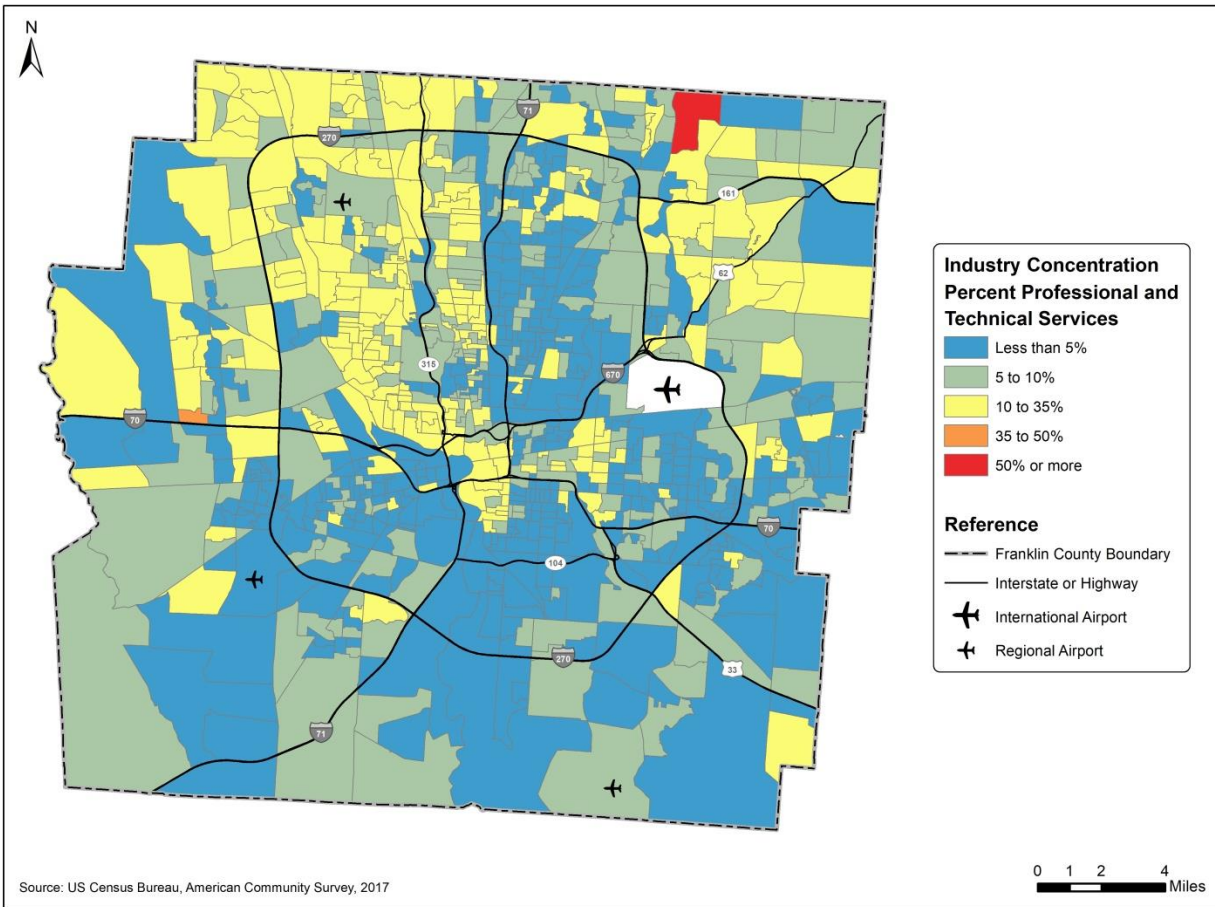
The location of these jobs is important to both employer and workforce development hub locations as well as the question of worker mobility. Industry concentration (jobs per acre) depict total jobs are most dense in the areas north of the central inner beltway. Yet, the distribution of some of the industries accounting for a greater number of jobs is varied.







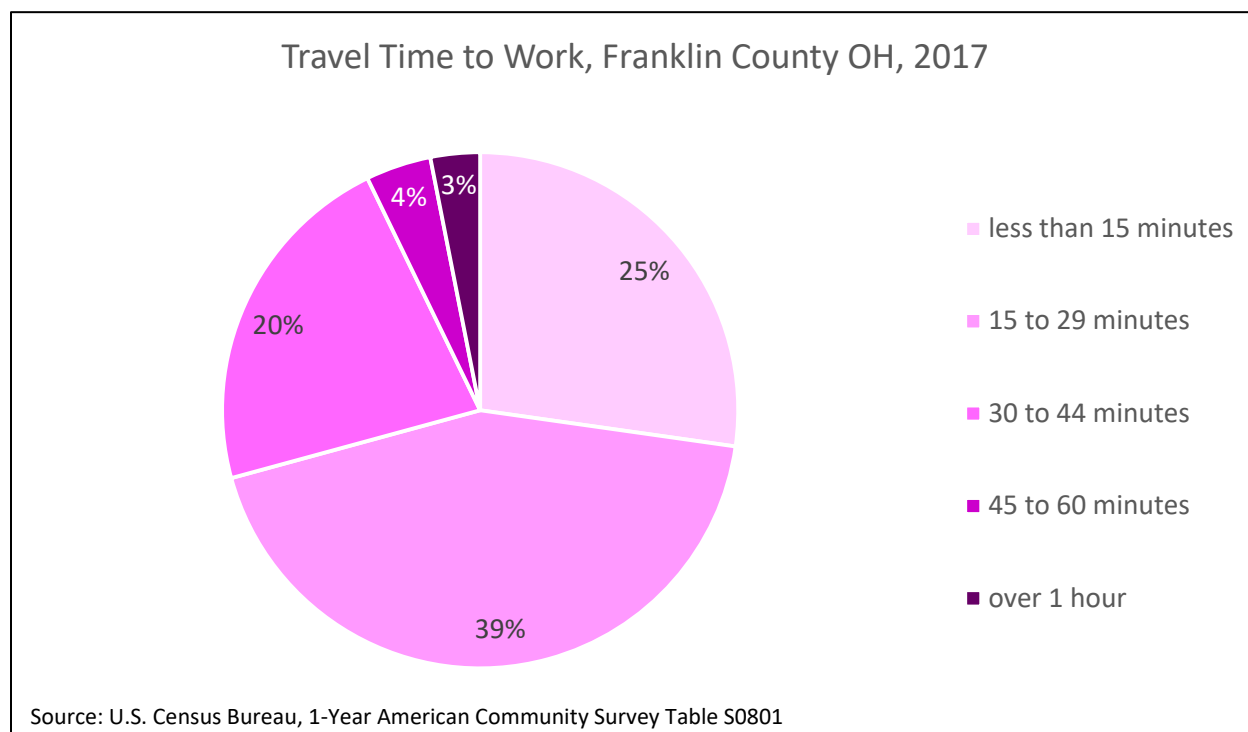




Workforce Mobility

Enhancing a regional workforce system must address more than preparing workers; job ready workers must be able to reach job locations. Large labor markets often face spatial mismatch—the oversupply of jobs is in locations where potential workers neither live nor are able to have reasonable commutes. For those without access to a vehicle, utilizing public transit and other affordable mobility services can be costly in terms of commute time and expense.

Taking the commute portion of the spatial mismatch first, in 2017 Franklin County's the vast majority of workers relied on a vehicle to commute (82% alone, 7% carpooled, and 2% took public transportation). Although the largest share of commutes to work locations within the County takes between 15 and 29 minutes, one out of five commutes in the County are between 30 minutes and 44 minutes.



The walk, transit, and bike scores of a Franklin County and its municipalities reinforce the prominence of vehicle usage, being car-dependent, having some to minimum transit, and somewhat bikeable.⁴⁰

⁴⁰ Walk score measures pedestrian friendliness by analyzing population density and road metrics such as block length and intersection density. Transit score measures the “usefulness” value to nearby transit routes based on the frequency, type of route (rail, bus, etc.), and distance to the nearest stop on the route. Bike score measures whether an area is good for biking using presence of bike infrastructure (lanes, trails, etc.), hills, destinations and road connectivity, and the number of bike commuters.

Walk Score				
City		Walk Score	Transit Score	Bike Score
	Columbus city, OH	41	31	47
	Dublin city, OH	16	NA	44
	Westerville city, OH	28	NA	NA
	Grove City city, OH	27	NA	48
	Gahanna city, OH	23	22	33
	Hilliard city, OH	21	NA	NA
	Worthington city, OH	33	8	38
	Whitehall city, OH	52	NA	NA
	New Albany city, OH	46	NA	50
	Upper Arlington city, OH	40	NA	NA
	Cleveland, OH	60	47	50
	Cincinnati, OH	50	44	35
	Toledo, OH	46	45	NA
Source: www.walkscore.com				

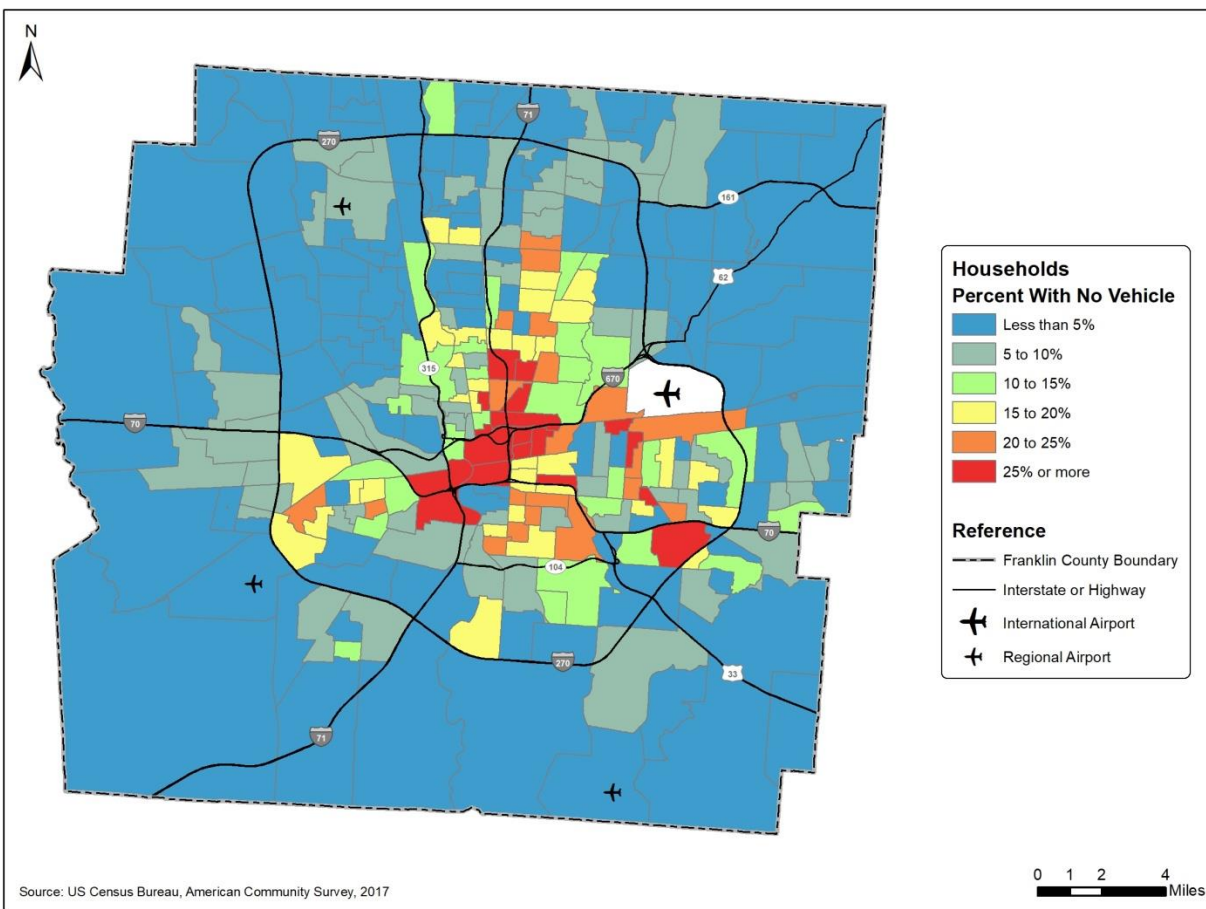
Franklin County has over half of its resident workers commute to Columbus, and about one-quarter commute to Franklin County's municipalities (cities and villages in this table). Of note is that more than a third of the workers live in other locations and commute to Franklin County work locations, not including the commutes to Columbus and Franklin County's municipalities. Franklin County's workforce mobility is vital to its ability continue to grow and attract these outside workers.

Place of Residence for Workers, 2015		
Place of Work	Franklin County, OH	
Place of Residence	# of Workers	Share of Workers
Columbus city, OH	303,248	41.0%
Grove City city, OH	15,038	2.0%
Dublin city, OH	15,028	2.0%
Gahanna city, OH	14,017	1.9%
Reynoldsburg city, OH	13,872	1.9%
Upper Arlington city, OH	13,768	1.9%
Westerville city, OH	13,766	1.9%
Hilliard city, OH	12,868	1.7%
Whitehall city, OH	7,505	1.0%
Delaware city, OH	7,340	1.0%
Newark city, OH	5,812	0.8%
Lancaster city, OH	5,673	0.8%
Pickerington city, OH	5,550	0.8%
Worthington city, OH	5,262	0.7%
Bexley city, OH	4,725	0.6%
Pataskala city, OH	4,050	0.5%
Powell city, OH	3,679	0.5%
Marysville city, OH	3,500	0.5%
Grandview Heights city, OH	3,432	0.5%
Lincoln Village CDP, OH	3,399	0.5%
Blacklick Estates CDP, OH	3,157	0.4%
New Albany city, OH	3,110	0.4%
Cincinnati city, OH	2,974	0.4%
Toledo city, OH	2,616	0.4%
Canal Winchester city, OH	2,491	0.3%
All other Locations	263,658	35.7%
Total	739,538	100.0%
Source: U.S. Census Bureau, On The Map		

Place of Work for Residents, 2015		
Place of Residence	Franklin County, OH	
Place of Work	# of Workers	Share of Workers
Columbus city, OH	317,656	53.5%
Dublin city, OH	25,060	4.2%
Westerville city, OH	16,193	2.7%
Grove City city, OH	13,869	2.3%
Gahanna city, OH	11,780	2.0%
Hilliard city, OH	11,467	1.9%
Worthington city, OH	11,023	1.9%
Whitehall city, OH	8,373	1.4%
New Albany city, OH	7,788	1.3%
Upper Arlington city, OH	7,469	1.3%
Groveport city, OH	7,174	1.2%
Reynoldsburg city, OH	5,271	0.9%
Obetz village, OH	4,857	0.8%
Cleveland city, OH	4,006	0.7%
Cincinnati city, OH	3,535	0.6%
Marysville city, OH	3,171	0.5%
Grandview Heights city, OH	2,901	0.5%
Delaware city, OH	2,603	0.4%
Canal Winchester city, OH	2,234	0.4%
Lincoln Village CDP, OH	2,111	0.4%
Pickerington city, OH	1,892	0.3%
Newark city, OH	1,669	0.3%
Lancaster city, OH	1,497	0.3%
Bexley city, OH	1,479	0.2%
Dayton city, OH	1,419	0.2%
All other Locations	117,265	19.7%
Total	593,762	100.0%
Source: U.S. Census Bureau, On The Map		

Workforce Mobility Equity Dimension

The data highlight that workforce mobility is a difficulty for those without a vehicle or not within a walk or one bus ride of work. One in four or more of Franklin County's households lack a personal vehicle, where lack of transit is a barrier to workforce participation, and possibly, access to higher paying jobs.



Central Ohio Transit Authority's (COTA) recent Transportation System Redesign of the existing bus system is an attempt to have the system reflect where people live and work now, doubling the number of high-frequency routes from seven to 15 and increasing weekend service. Although the redesign resulted in 89% more people (+103,000) and 71% more jobs (+110,000) being within a quarter of a mile, in 2018 ridership increased only 3%.⁴¹ The system is still not dense enough to be able to address the depth of workforce mobility issues in the region.

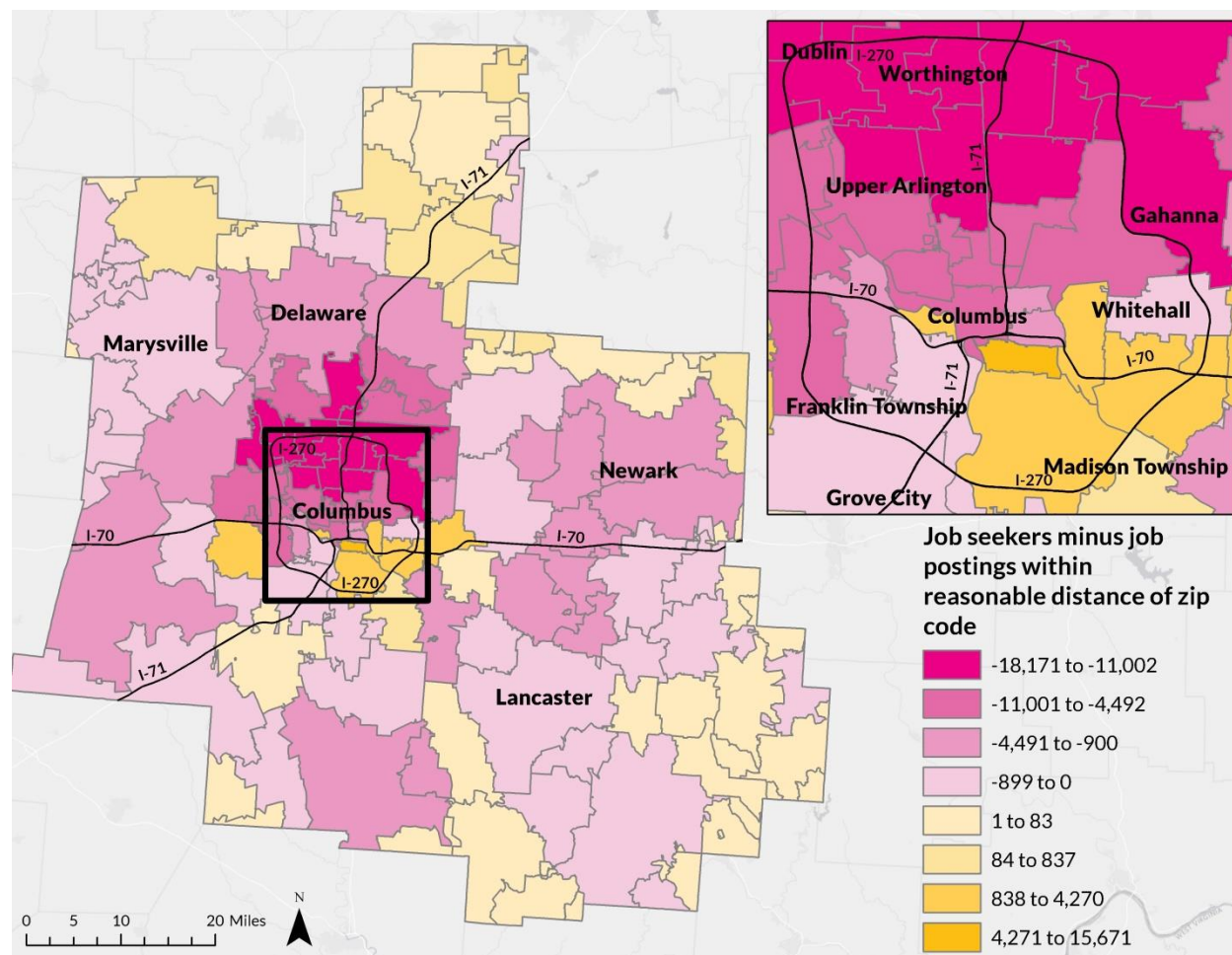
The Columbus region's spatial mismatch between job seekers and job postings indicates the mobility inequities among minimum-wage employment in restaurants, retail, and customer-service.⁴² Although the Columbus region has areas with an oversupply of such jobs—mostly in the northern part of the regions—and an undersupply of applicants within a reasonable distance of those jobs (represented in dark pink),⁴³ Columbus also has pockets—mostly in the southern part of the region (represented in

⁴¹ In comparison to ten other metro systems that COTA uses for benchmarking, this is actually a positive result since the average across all systems was a decline of 13% in ridership.

⁴² Christina Stacy, Terry-Ann Craigie, Brady Meixell, Graham MacDonald, Sihan Vivian Zheng, and Christopher Davis, "Too Far from Jobs: Spatial Mismatch and Hourly Workers," Urban Institute, February 21, 2019, <https://www.urban.org/features/too-far-jobs-spatial-mismatch-and-hourly-workers>.

⁴³ "Reasonable distance" is 6.3 miles from the population-weighted centroid of each zip code, the average distance between job seekers and jobs for each application in our dataset. See Urban Institute study.

gold)—where job seekers outnumber job postings within a reasonable distance from their homes. In a comparison of the 16 largest metros in the analysis, only Atlanta (58%) and Miami (62%) had a greater percent of zip codes with more job seekers than postings within a reasonable distance.⁴⁴ These data likely undercount industrial and logistics jobs, and thus provide only a picture of the mismatch. Regardless, these are jobs in the industries that are prevalent in Columbus' occupational profile. The transit challenge for prospective workers is a barrier to gaining access to jobs that may be a fit for them.



Source: Urban Institute, 2019, <https://www.urban.org/features/too-far-jobs-spatial-mismatch-and-hourly-workers>.

New development exacerbates the friction when there is neither a process of considering how workers will get there nor an examination of the challenges of first and last mile connections. The cost of development does not incorporate the equitable reality of workforce mobility on transit. Without additional funds for more routes at greater frequencies, new development is beneficial to one area with

⁴⁴ Across all the MSAs in the Urban Institute's data sample, Snag data represent 13 percent of all new hires in 2017, as measured by the Quarterly Workforce Indicators, a longitudinal dataset of economic indicators from the US Census Bureau. The applicants in the system generally have only a high school diploma and are evenly split by gender. Unlike traditional job datasets, these data include all job postings and all applicants (rather than only matched jobs) and are available at the zip code level.

increased transit service, but this is likely a result at the detriment of areas that likely see transit service decreased. The region lacks an analysis of job centers, or nodes, in relation to the workforce location and transportation and transit needs of the workforce. From an industry concentration perspective, Franklin County's spatial mismatch is particularly a burden in the southern, higher poverty areas. The inequity of the mismatch limits potential workers' access and increased economic productivity in the region.

People Weaknesses Wrap

The collection of Franklin County's weaknesses (poverty, workforce system, and workforce mobility) suggests a need to focus on equitable and inclusive community discussions that examine steps to make change. People of color and those living in poverty that also have a lack of workforce opportunities or access to jobs bear a higher burden when government and stakeholders do not compute the effects on these communities. Greater community outreach and intentional engagement to assess the needs and gaps more clearly are essential, and Franklin County EDP could move in this direction, opening new channels of collaboration with residents and city, village, and township leadership.

Opportunity: People

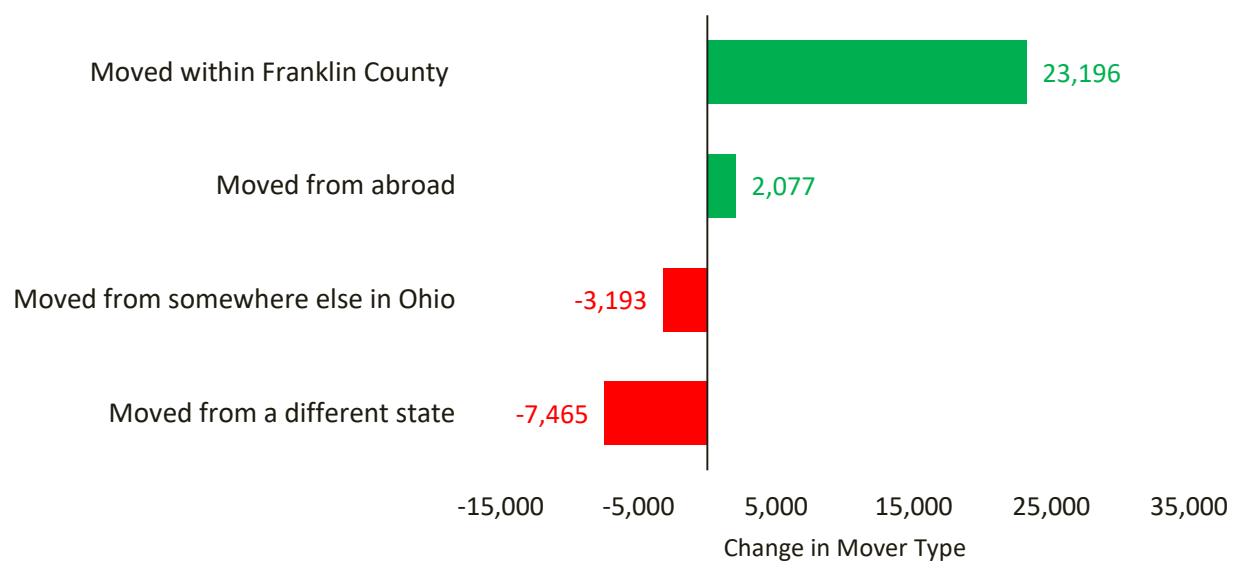
Leverage Diversity

Building the capacity of the people in Franklin County will enable its assets, resources, and residents to achieve greater opportunity, thus recognition of how to harness the demographics of increasing diversity is vital. Inclusive economic opportunity increases future generations' abilities to experience higher upward mobility and can create faster regional rates of per capita income growth.⁴⁵ Inclusive approaches to growth also lower fiscal, social, and political costs. Government becomes more sustainable in long run because the greater participation of residents increases tax revenues that support public goods. Social and political cohesion tends to increase in an inclusive society, giving a government greater flexibility.

Although mobility rates have been trending downward in Franklin County over the past several years with most being intra- County moves, over 2,000 more movers came from outside the U.S. compared to five years prior, indicating an uptick in international migration. The County is also becoming more racially diverse, accounting for 79% of all non-white population growth in the Columbus MSA. The African-American population grew the most in numbers (+37,000), and the Hispanic population had the sharpest growth rate (+19%). Policies and mechanisms that can enable a greater diversity of people to participate in the economy can help Franklin County in the long run.

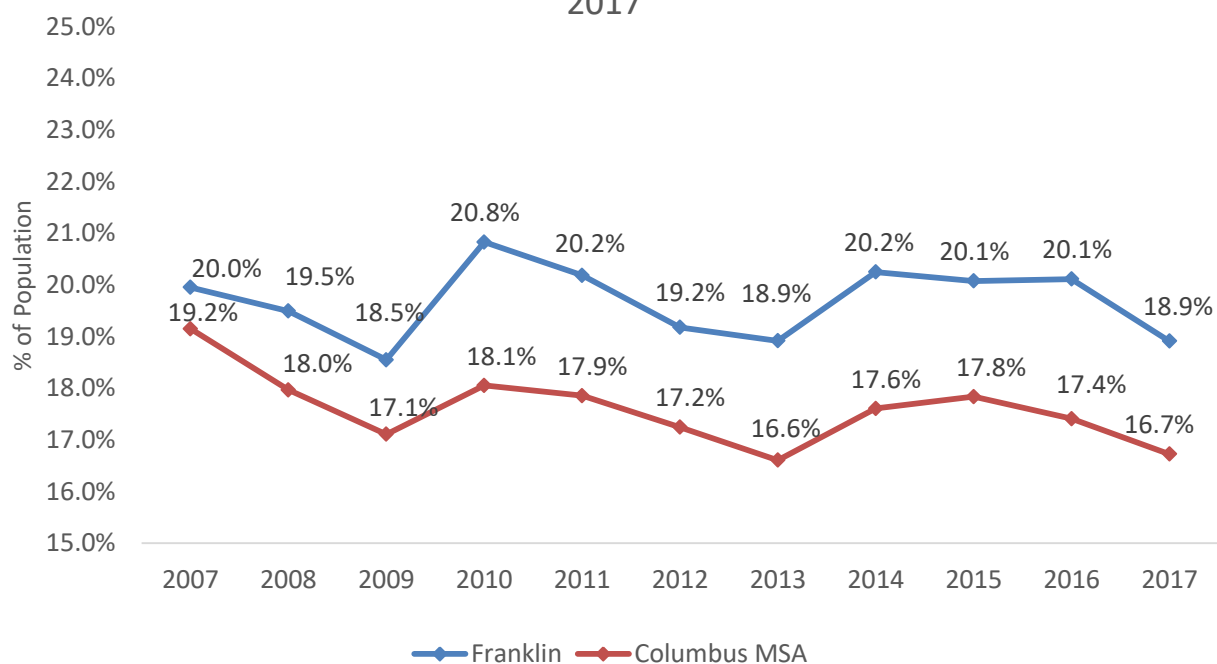
⁴⁵ Katharine Bradbury and Robert K. Triest, "Inequality of Opportunity and Aggregate Economic Performance," RSF: The Russell Sage Foundation Journal of the Social Sciences 2, no. 2 (2016): 178–201, <https://doi.org/10.7758/rsf.2016.2.2.08>.

Change in Mover Type into Franklin County, OH 2012-2017



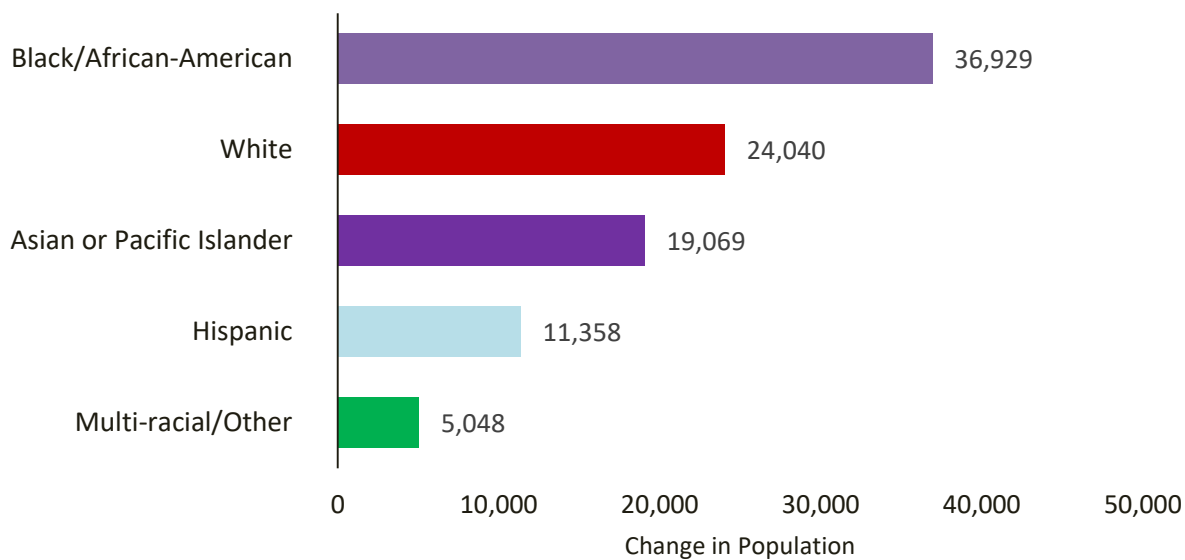
Source: U.S. Census Bureau, 1-Year American Community Survey Table B07001

Percentage of Population that Moved within the Past Year, 2007-2017

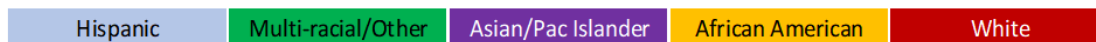
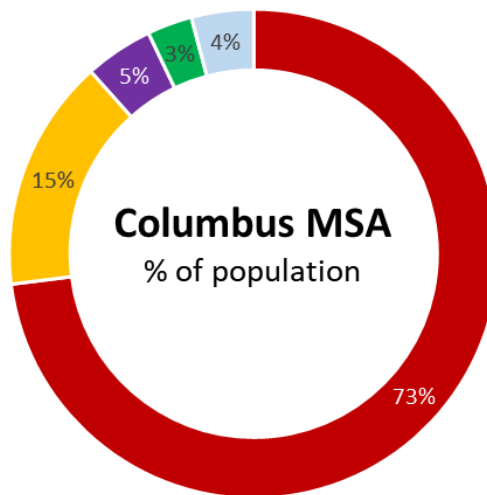
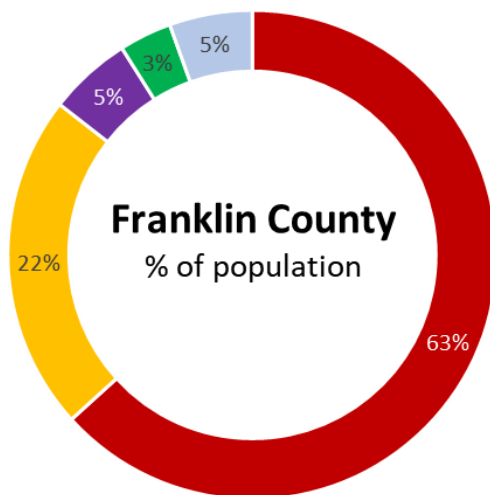


Source: U.S. Census Bureau, 1-Year American Community Survey Table B07001

Change in Race of the Population, 2012 to 2017, Franklin County, OH



Source: U.S. Census Bureau, 1-Year American Community Survey Table B03002



Source: U.S. Census Bureau, 1-Year American Community Survey Table B03002

Collaboration around County Poverty Efforts

The Franklin County Poverty Study and the Economic Inclusion Advisory Council have outlined multiple goals and strategies that are in line with EDP's goals for the strategic plan. Facilitating, collaborating, partnering, and leading on specific policies that are within EDP's vision and capacity is an opportunity to collectively move the needle on equitable and inclusive development. For example, the Poverty Study is a result of stakeholder and neighborhood engagement as well as stewardship from working groups and a representative steering committee. It lays out goals and strategies around increasing access to high paying jobs:

- Increasing employers' engagement in neighborhoods of concentrated poverty—through creation of living wage and high-paying jobs for residents.
- Eliminating systemic class and racial wage gaps in employment.
- Increasing access to relevant training for credentials that meet local demand with employer commitments to hire and promote.
- Improving and increasing the delivery of supportive services for individuals to access employment.

Within each strategy exists multiple levers to pull, and thus the next phase will require figuring out which department, program, and external organization can start the process and push issues forward. EDP could craft a facilitating and/or convening role, if not more, and prioritize resources accordingly. Focusing on building and sustaining shared commitment to the study's identified issues is imperative. At a higher level, Franklin County EDP should stake a curating role and provide expertise, guidance, and resources around issues of workforce and growth. It could bring together ideas, data, and initiatives to create common language linked to a regional purpose. For example, EDP could likely lead discussions to create a more seamless, workforce system through:

- engaging employers;
- supporting small businesses in neighborhoods;
- incentivizing employers to directly engage participants in skills training that will directly lead to a job and apprenticeship/earn-to-learn programs; and
- initiating zoning changes in targeted neighborhoods to improve ease of use.

In relation to planning, zoning, and land uses issues, the EDP could take advantage of being a functional economic and community development department. Utilizing the County poverty initiatives and EDP strategic plan to increase internal collaboration between economic development and planning could provide a foundation from which EDP could more clearly define issues and have a more strategic approach to planning that connects the intersections of the two functions, including more joint outreach. This would include having more intentional conversations with Franklin County's municipal elected officials and leadership that often have less capacity or less understanding of the value of EDP as a partner. Issue areas that may be of particular interest would be brownfield redevelopment and neighborhood needs for services and retail.

Regional workforce system

Leadership and Partnership

Beyond the County's poverty efforts, Franklin County EDP needs to reassess its role in the workforce development system in a manner that shows thoughtful and active participation that can result in aligning economic development and planning priorities with the workforce development agenda. This would include the investigation of a stronger partnership with the recharged Workforce Development Board of Central Ohio (WDBCO) given that a number of discussions revealed that WDBCO may now be ready to lead on workforce issues in the region. The Board's focus on jobs with solid career pathways and good wages intersects well with EDP's goals. WDBCO has a prime emphasis on the health, technology, and insurance sectors, and Franklin County could define a complementary focus that could leverage current programs, like People Works, with attention to increasing the program's impact.

Franklin County EDP could partner with WDBCO to address the fragmented system and create a *workforce advisory council* that would have a regional approach and bring together the WDBCO with all other workforce providers into a collaborative body. A first step would be an assessment of existing programs and quality of results by types of business. The assessment could define which organization is achieving results and identify the gaps of services limiting the participation of workers and businesses. EDP's leadership could facilitate the setting of a framework and gain consensus on which organization(s) will have responsibility to make progress. The council could set better rules that make more sense to workforce development providers and engage them in a capacity building manner with funding that could lead to a more collaborative and less siloed, competitive environment. The top issues of concern could be enhancing collaboration between the technical training and soft skills and creating a more synchronous line of communication with employers that could lead to improved articulation of required skillsets for jobs. Such assessments prepare the workforce development system for cyclical responses. Finally, the council's collective message could create a new dialogue with employers around how they can help their own workers advance in terms of education, certifications, and sector-specific training.

Taking a leadership role within the county could also translate to the needs in Rickenbacker. A collective effort of Franklin County, WDBCO, Columbus Regional Airport Authority, Pickaway County, and the Joint Economic Development Zones (JEDZ) / Joint Economic Development Districts (JEDD) could be particularly effective in creating a workforce policy space and discussion with the industry associations, large employers, and the surrounding retail, restaurants, and hospitality businesses serving the area.

PeopleWorks

EDP could fill a gap with an intentional equitable redesign of PeopleWorks. EDP could take the program's evaluation findings and creatively focus policies and incentives that can have an effect on quality jobs, connect it to initiatives coming out of the poverty efforts,⁴⁶ and determine a niche of businesses where the program could move the needle. Reigniting the program could establish a voice for EDP in all County workforce issues if the program defines a niche that meets County interests and

⁴⁶ Susan Post, "Franklin County Launches Program to Develop Entrepreneurs in Underserved Communities - The Metropreneur Columbus," accessed February 8, 2019, <https://themetropreneur.com/columbus/franklin-county-launches-program-to-develop-entrepreneurs-in-underserved-communities/>.

EDP goals, such as social enterprise, small business, returning Franklin County residents, reentry workers, and/or individuals with disabilities. The redesign could examine the how it could help recipients navigate the benefits cliff and regulatory requirements that limit the targeted businesses' participation. For example, in a situation that federal monies are part of County grants, there may be a minimum salary requirement for an incentive and/or training to result in a job paying over \$40,000. However, this is often too high for the budget of a social enterprise and other nonprofits.

In any redesign, EDP needs to respond to a central concern from stakeholders that many workforce providers and businesses are unaware of existing EDP programs. A recharged PeopleWorks program will provide the opportunity for EDP to engage employers and directly market and educate them about the program as well as other complementary workforce programs that the county has. The marketing and outreach strategy should include:

- convening businesses;
- speaking at business association and municipal meetings; and
- ensuring that PeopleWorks is part of a suite of programs that the workforce development network and partners recognize and offer clients.

EDP's programmatic expertise with stronger leadership internally on Franklin County workforce, diversity, and poverty issues and externally with partners could strengthen the regional system.

People Opportunities Wrap

Enabling the participation of a greater diversity of residents and businesses in the economy is fiscally beneficial to Franklin County in the long run. Prioritizing regional workforce strategies and efforts to leverage diversity and increase opportunity for African-American and immigrant communities can also build on the energy in the County around poverty and economic inclusion initiatives.

Threat: People

Importing Talent

Columbus' population growth of 5.5% from 2010-2015 relied on in-state migration with actual net migration losses to the rest of the US, similar to Indianapolis, and Minneapolis-St. Paul.⁴⁷ Thus, the region is dependent on the state of Ohio continuing to grow an educated population. Forecasts indicate that this will not likely be possible, principally because the state of Ohio only grew 1% from 2010-2017, and projected growth is only 0.8% by the year 2050.⁴⁸ The Columbus region will need to diversify its in-migration flows to meet the forecast of 20.5% by 2050.⁴⁹

⁴⁷ Aaron M. Renn, "Midwestern Breakout?," City Journal, December 17, 2018, <https://www.city-journal.org/columbus-ohio-growth>.

⁴⁸ Office of Research, Ohio Development Services Agency, "State of Ohio: Population Projections by Age and Sex, 2015 to 2050," April 2018, <https://development.ohio.gov/files/research/P6001.pdf>.

⁴⁹ Office of Research, Ohio Development Services Agency, "Franklin County: Population Projections by Age and Sex, 2015 to 2050," April 2018, <https://development.ohio.gov/files/research/P6026.pdf>.

The education levels of imported talent are also problematic. Columbus' college educational attainment for residents born outside of Ohio is of 43%, but only approximately one-third residents born within the state possess a bachelor's degree or higher.⁵⁰ With lower educational outcomes among the native born population, relying on migration only from within Ohio is likely to exacerbate the situation.

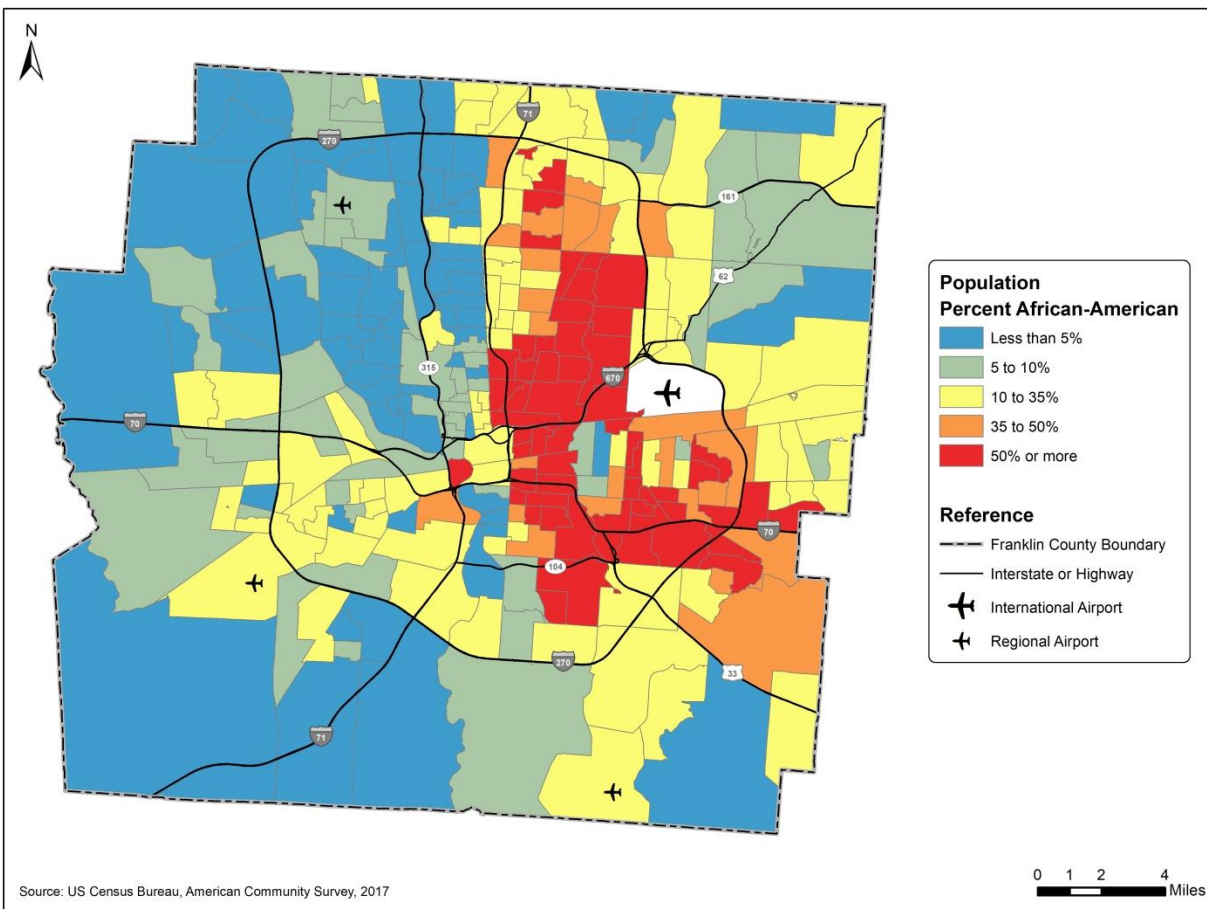
Franklin County's 2017 in-migration by education level and industry capture the differences from those coming from within Ohio to those coming from outside Ohio. Although movers from within Ohio are balanced in less than and more than a bachelor's degree, the within-Ohio in-migrant was lower educated. Retail trade gained the most in-migration, those with less than a bachelor's degree. For higher levels of educational attainment, educational services attracted the most from outside Ohio, likely due to the university, while health care attracted those from within Ohio.

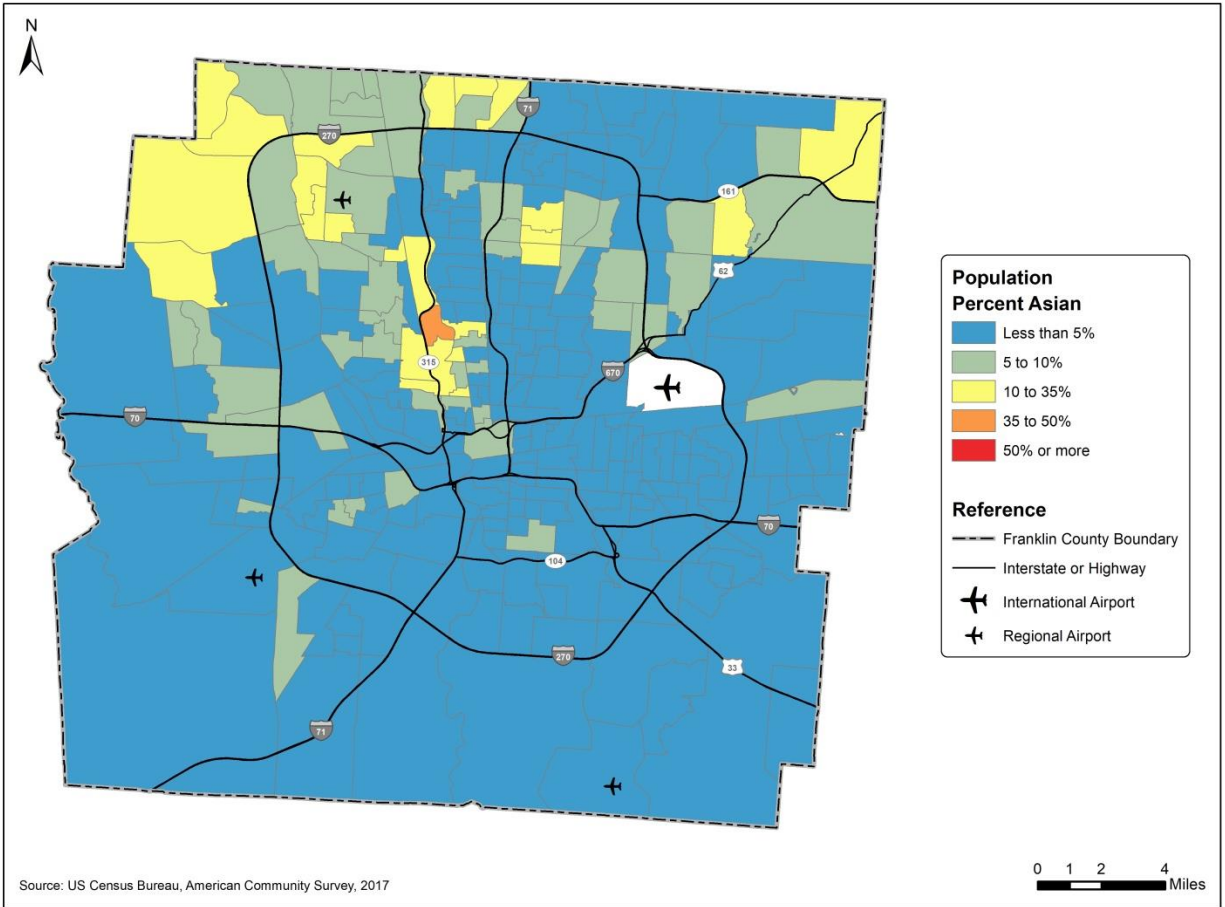
Migration and wages by industry indicate that one-quarter of those moving to Franklin County from outside Ohio and one-third from within Ohio are in industries paying less than \$25,000—retail trade and accommodation and food service. The higher-wage jobs show greater variation with movers from outside Ohio in retail trade and education services. Within-Ohio in-migration and higher wages are in transportation and warehousing and profession, scientific, and technical services. Education services again exhibits the presence of a large university. The overall takeaway of the analysis of movers by education, wages, and industry is troubling since most are less educated and taking lower wage jobs.

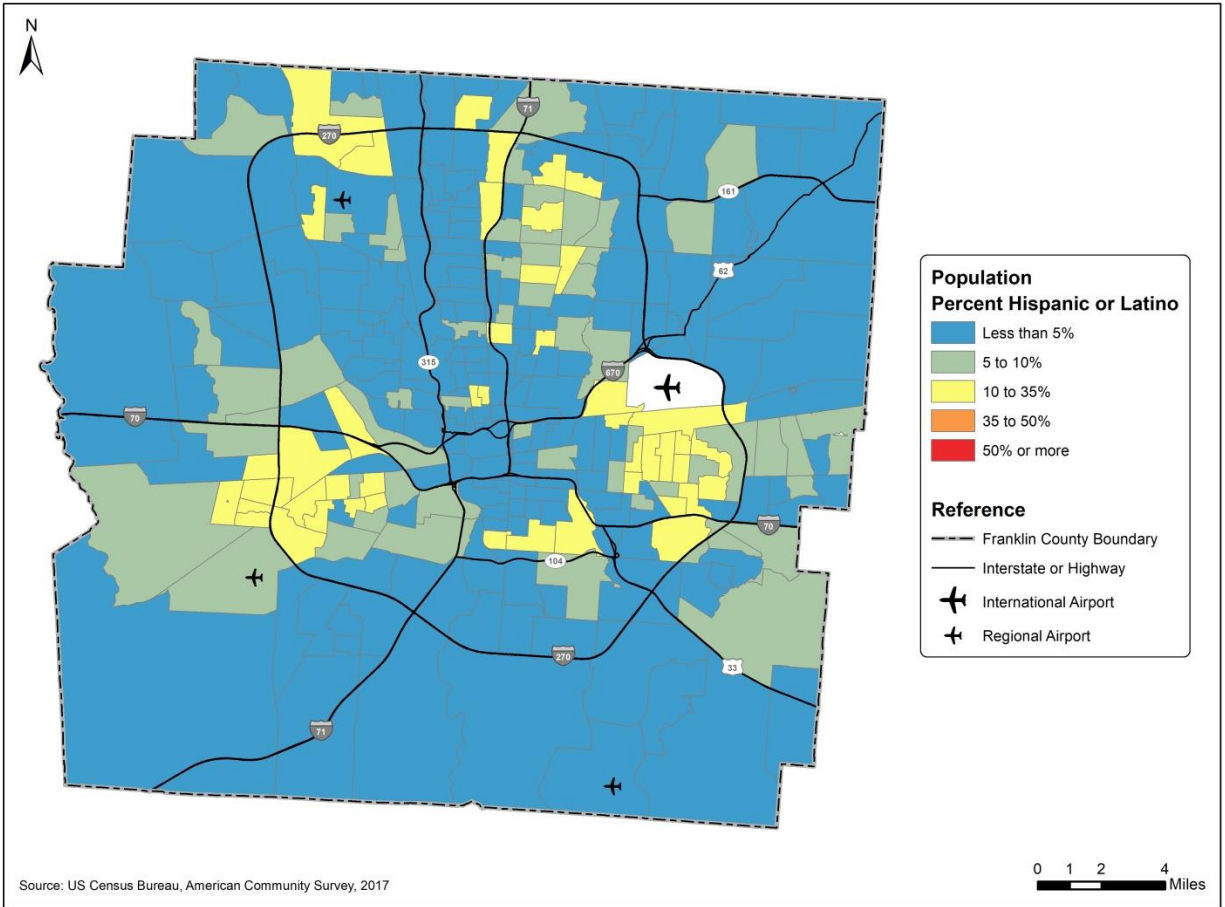
⁵⁰ Avalanche Consulting, 56.

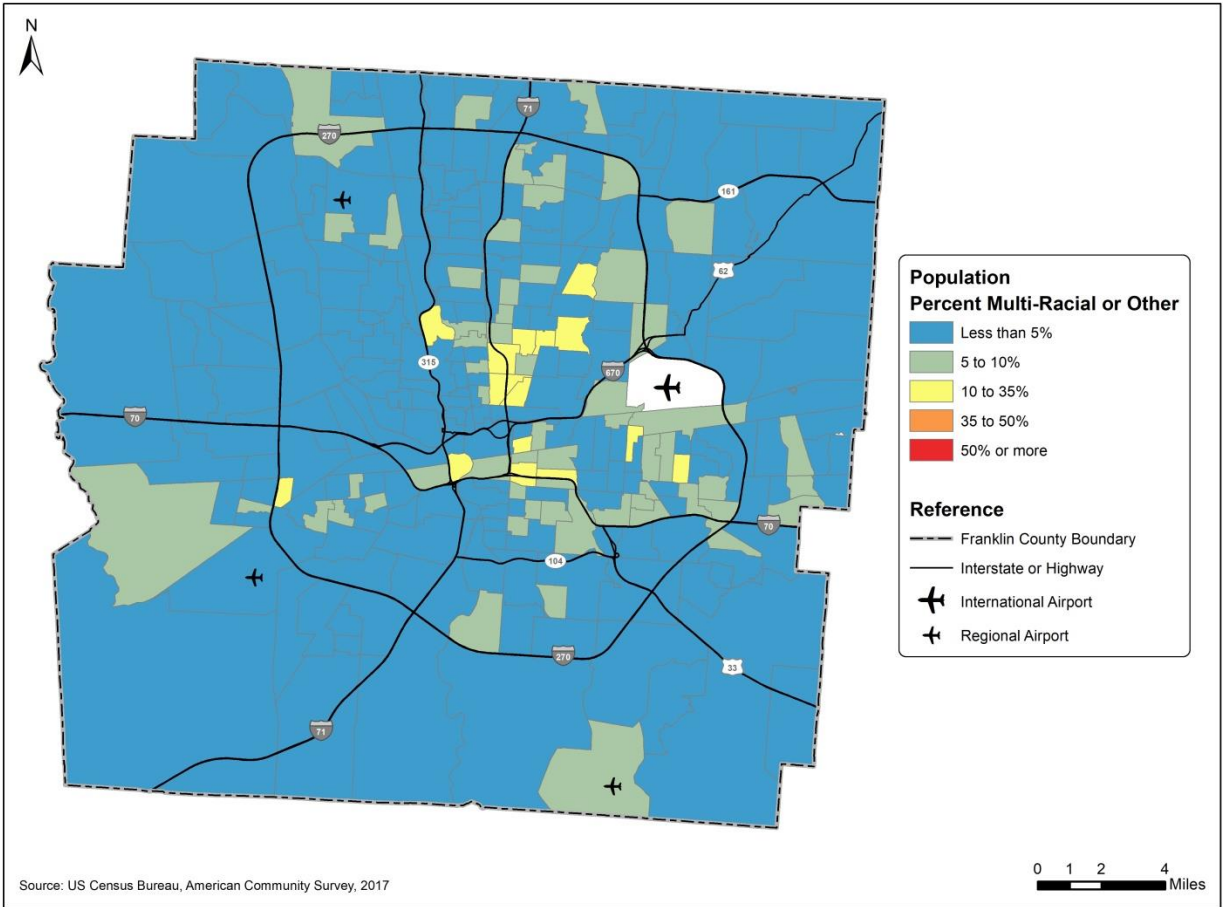
Persistent Diversity Exclusion and Disparities

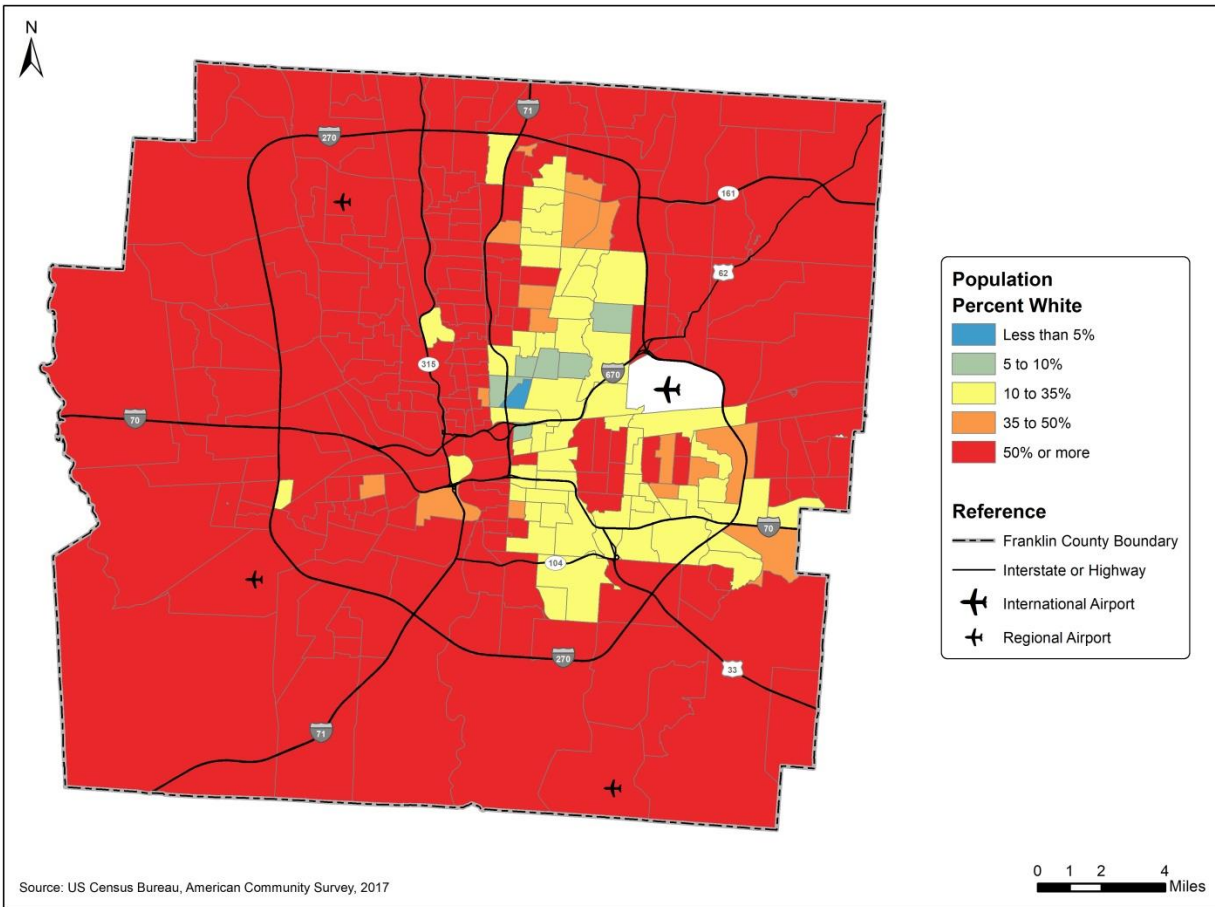
The subject of and conversation around diversity in the region is evident, and policy makers and leaders must acknowledge implicit bias and historical racism's role in today's poverty and economic opportunity. Franklin County needs to change course because it is becoming more racially diverse, and as the maps indicate, Franklin County is fairly racially segregated, further entrenching issues.





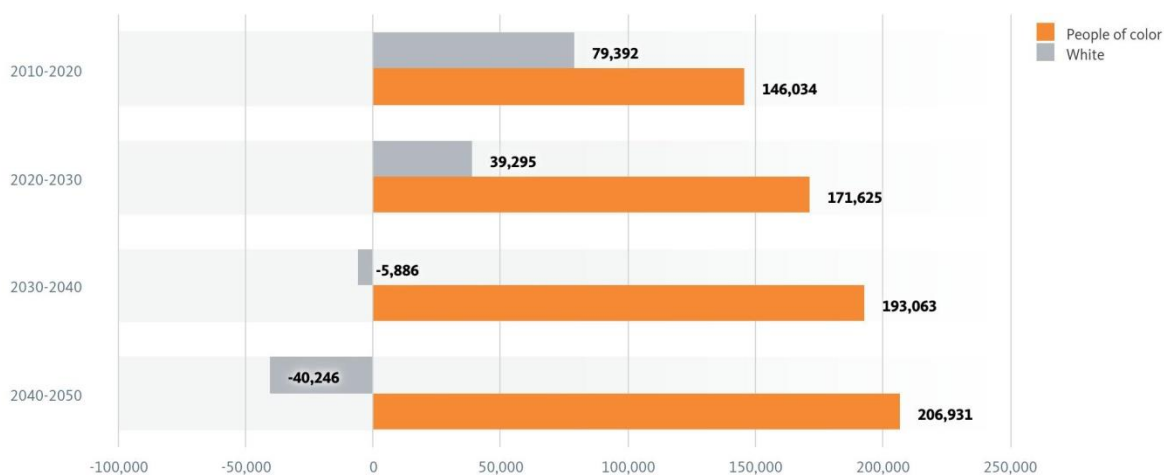






Leadership and thoughtful questions and responses to address these entrenched issues can give credibility to the conversation and understand if businesses are hiring diverse workers and how the workforce system leaders can address it. The logic behind a concerted effort is evident because over the next 30 years, Columbus' net population growth will come from communities of color. To have a successful region, it is vital to integrate these communities into the economy and pathways to economic opportunity.

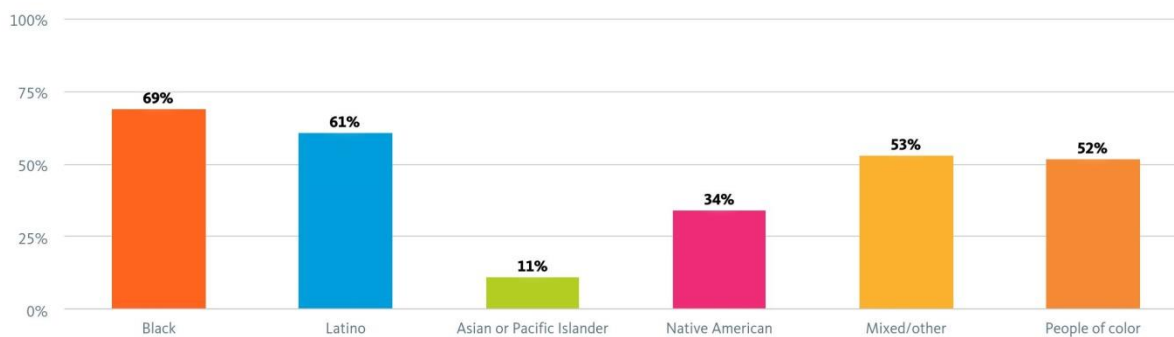
Change in population by race: Columbus, OH Metro Area, 2010-2050



U.S. Census Bureau; Woods & Poole Economics, Inc.
 PolicyLink/PERE National Equity Atlas, www.nationalequityatlas.org

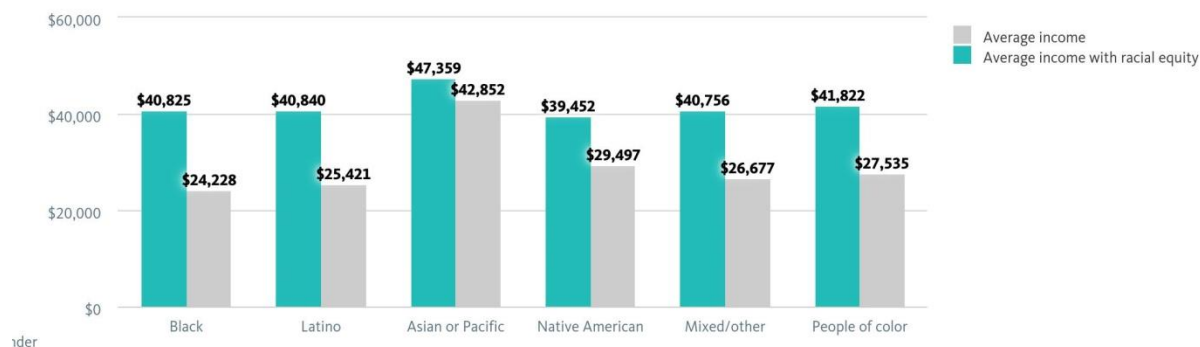
For Columbus, the economic benefits of inclusion and racial equity would result in an average annual income increase for all people and for 69% of the Black population and 61% of the Latinos.

Income gain by race/ethnicity: Columbus, OH Metro Area, 2015



IPUMS
 PolicyLink/PERE National Equity Atlas, www.nationalequityatlas.org

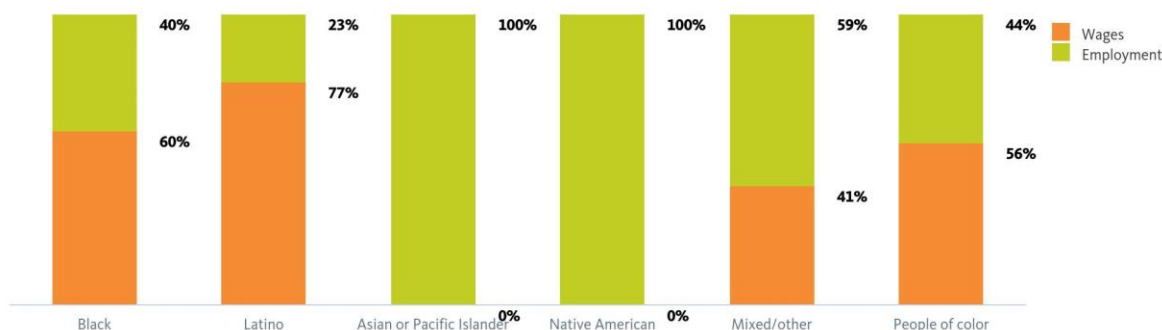
Income by race/ethnicity: Columbus, OH Metro Area, 2015



IPUMS
 PolicyLink/PERE National Equity Atlas, www.nationalequityatlas.org

The expected gains come from eliminating employment barriers that increase wage opportunity. For example in the Black population, 60% of the gain would come from increased wages and 40 percent from increased employment.

Wage and employment shares of gain by race/ethnicity: Columbus, OH Metro Area, 2015



IPUMS
PolicyLink/PERE National Equity Atlas, www.nationalequityatlas.org

Franklin County is at risk of losing this gain without addressing policies that boost educational attainment and eliminate discrimination in pay and hiring. Strong and rising wages for low-wage workers provide families with greater economic security and benefit the community and the economy due to greater potential for consumer spending.⁵¹

Regional Workforce Readiness

The Columbus region faces a multi-pronged threat in regard to how jobs may be changing radically or made redundant. The workforce system needs to future-proof for promising quality jobs that exist now and for those that may be coming.

Automation

The region's job automation risk is problematic since it could affect 45% of its occupations with tasks that have the potential for automation and nearly a quarter of occupations at a high-risk of automation.⁵² The threat is greatest in six specific occupations, employing 13% of workers in leading industries: Automotive & Transportation and Manufacturing (Assemblers & Fabricators and Other Production Occupations), E-Commerce & Logistics (Motor Vehicle Operators and Material Moving Workers), and Finance & Insurance (Financial Clerks and Financial Specialists).⁵³ The impact will likely be

⁵¹ PolicyLink/PERE, "National Equity Atlas."

⁵² Mark Muro, Robert Maxim, and Jacob Whiton, "Automation and Artificial Intelligence: How Machines Are Affecting People and Places" (Washington, D.C.: The Brookings Institution, January 2019), https://www.brookings.edu/wp-content/uploads/2019/01/2019.01_BrookingsMetro_Automation-AI_Report_Muro-Maxim-Whiton-FINAL-version.pdf.

⁵³ Avalanche Consulting, "Regional Economic Development Assessment: Report 2: Competitive Forces Analysis," July 2018, 6.

greatest on the lowest wage jobs that have the least education requirements and where Black and Hispanic workers are more concentrated in these automatable occupations.

Rank	State and Metropolitan area	Average automation potential	"Low risk" job share	"Medium risk" job share	"High risk" job share
13	Ohio	47.2%	37.8%	34.4%	27.8%
70	Columbus, OH	44.7%	41.9%	33.3%	24.8%
<i>Note: Averages weighted by occupational employment share. Automation potential refers to the share of tasks in an occupation that could be automated with current technologies. "Low risk" jobs are those for which over 30 percent of tasks or less are potentially automatable, "Medium" those with between 30 and 70 percent of tasks automatable, and "High" those with over 70 percent of tasks automatable</i>					
<i>Source: Brookings analysis of BLS, Census, EMSI, Moodys, and McKinsey data</i>					

Changing Nature of Work and Skillset

The workforce development system and incentives must strive to improve workforce readiness and equity, while also adjusting to the variation in workforce providers that have a growing influence. Staffing agencies and contract work is an example. Companies are incorporating contract workers; however, these jobs may not count for nonprofits trying to place workers. Also, these new types of work require a worker's skillset to be ready for change by new job and site. The challenges suggest more flexible funding for nonprofit providers and programs that focus beyond technical skills and credentials and emphasize soft skills such as professionalism, communication, & teamwork. The workforce effort requires a long-term approach and more intense guidance of individuals before, during, and after placement.

The wrap-around approach and future proofing in workforce development often suffers critiques that such new programs lack a business case or return on investment. In addition, the political environment can be hostile, assuming that people are just not trying and/or should have those skills already. With approximately 1,000 more households leaving Franklin County between 2015 and 2016 than moving in Franklin County lost \$391 million more in adjusted gross income than it gained from the households⁵⁴ who moved in.⁵⁵

People Threats Wrap

The threats to Franklin County's future represent opportunities if its investment in people, from education to workforce skills, occurs in an equitable and inclusive manner. Attention to disruptive

⁵⁴The most recent data available on households from the IRS migration data.

⁵⁵ Rouan, "Columbus' Income Tax Revenue Not Keeping up with Population Growth."

trends, like globalization, technological change, and demographic shifts, is necessary to address the changing nature of work, increasing levels of income disparities, and inequality of opportunity.

People Capacity Conclusion

In an uncertain environment with “highly disruptive trends”⁵⁶ like globalization, technological change, and demographic shifts, regions are unable to address the increasing levels of income disparities and inequality of opportunity without a comprehensive, integrated, systems-level approach to local economic development. The call to embed inclusive and equitable growth recognizes the need for quality growth, from the neighborhood up, linking place-, people-, and project-based economic development to what it should be—genuine economic and community development that increases community well-being and economic opportunity.

Franklin County EDP’s leadership, inquiry, and development of creative policies and tools to address specific gaps in the issues of poverty, diversity, and regional workforce are vital to continuing and increasing its resident quality of life.



Business Capacity SWOT

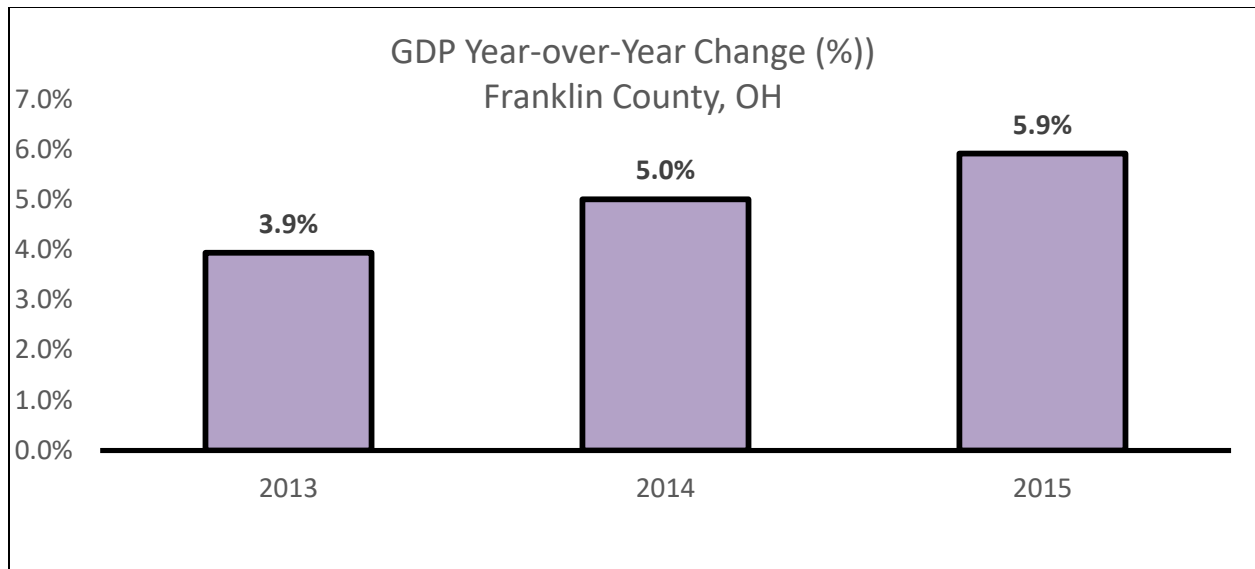
Business capacity assesses the assets or challenges relevant to business, including evolving workforce needs and requirements, facilities and equipment, organization, and the production supply chain. Business capacity emphasizes adding or reallocating resources (employees, inventory, equipment, capital, etc.). A related and vital component of business capacity is the innovation and entrepreneurial capacity of a neighborhood, including the potential for generating new and growing existing small businesses as well as high-growth businesses.⁵⁷

Strength: Business

Franklin County’s GDP has been rising, expanding approximately \$12.3 billion (15.6%) between 2012 and 2015. Nearly three-quarters (74.8%) of the County’s economic output as of 2015 was composed of *private service-producing* industries. Despite the dominance of this component, it only accounted for 14.9% of GDP growth from 2012 to 2015. The *private goods producing* industries (construction, manufacturing, and mining) accounted for 31.8% of GDP growth from 2012 to 2015 and increased from 9.8% of the County’s economic output in 2012 to 11.2% of the economy in 2015. During this same time period, the share of the economy represented by government and government enterprises declined from 14.9% to 14.0% down to 8.4% of GDP.

⁵⁶ Joseph Parilla, Sifan Liu, and Marek Gootman, “Charting a Course to the Sacramento Region’s Future Economic Prosperity,” April 2018, 1, https://www.brookings.edu/wp-content/uploads/2018/04/sacramentoregioneconomicprosperity_fullreport.pdf.

⁵⁷ The people-centric focus of workforce, such as education, talent, and coordination of people, is found in the people capacity section above. Understanding business needs and trends is central to business capacity; it is incumbent on the workforce leaders to build a system that communicates and integrates this business perspective efficiently.

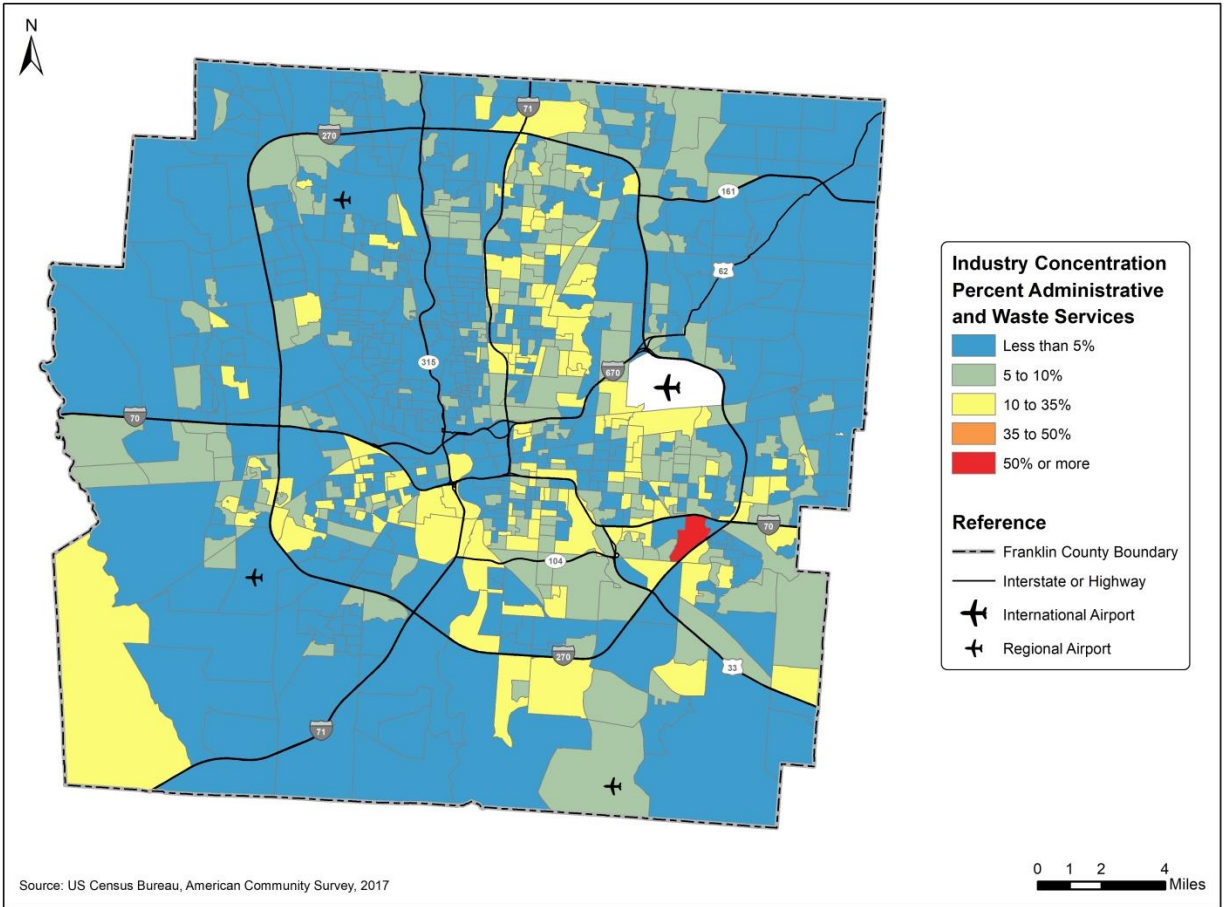


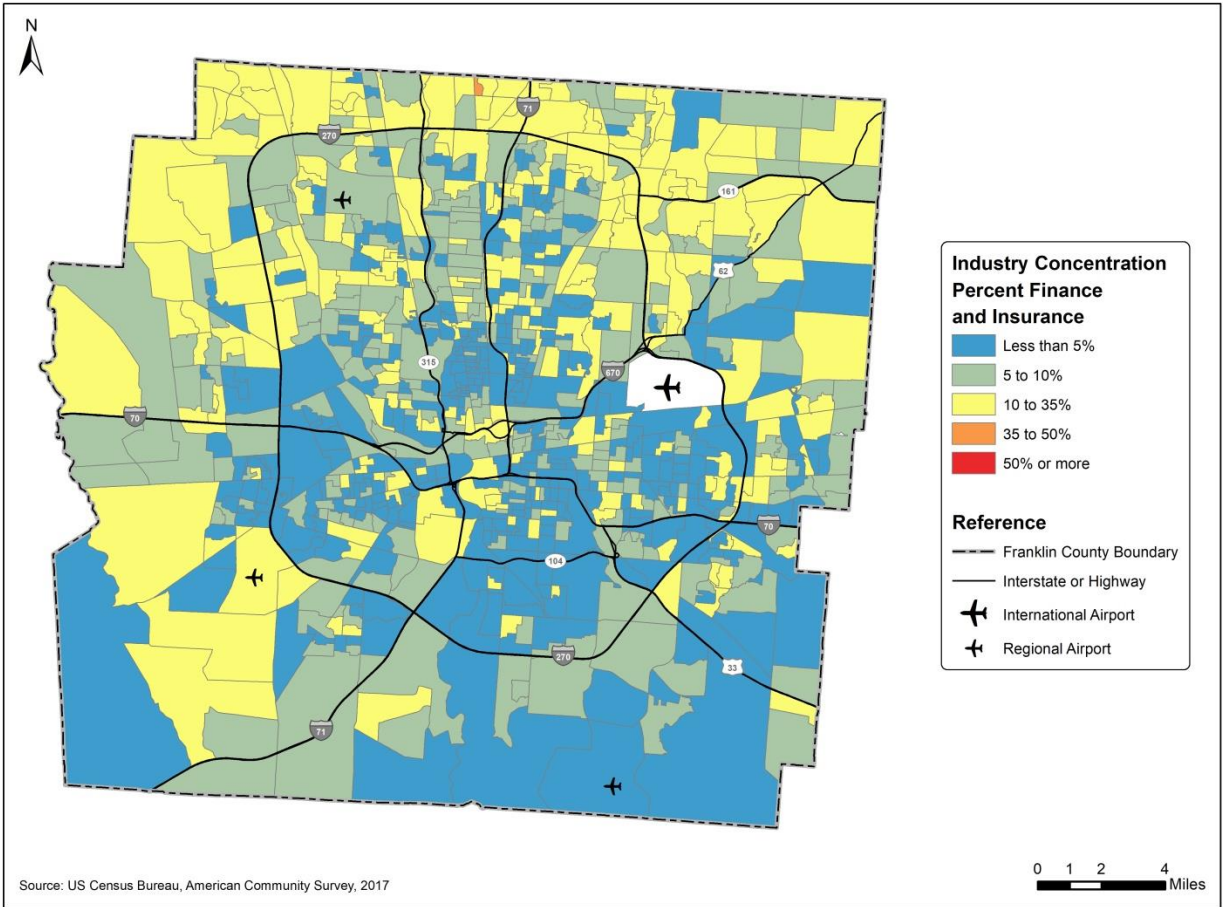
Source: U.S. Bureau of Economic Analysis

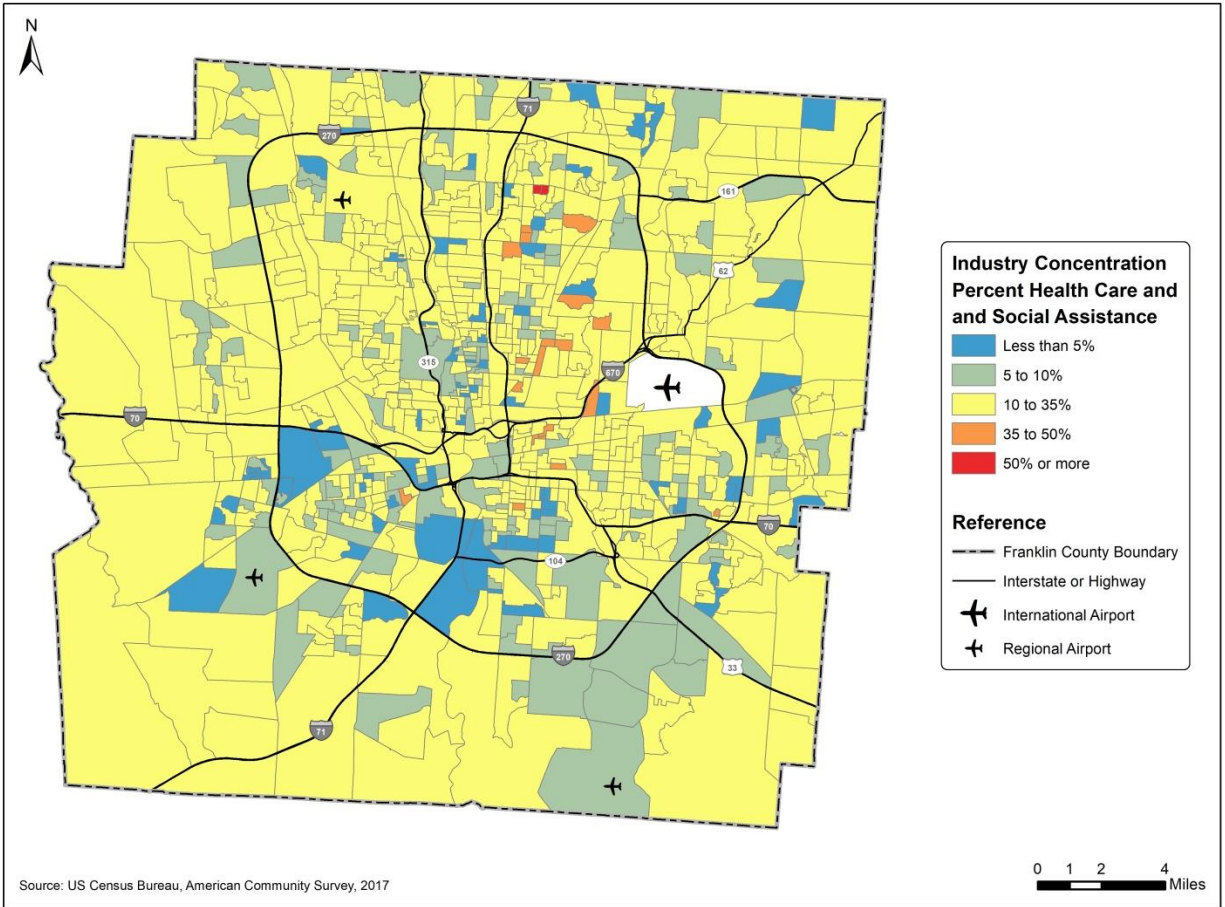
Industrial Job Concentration and Location

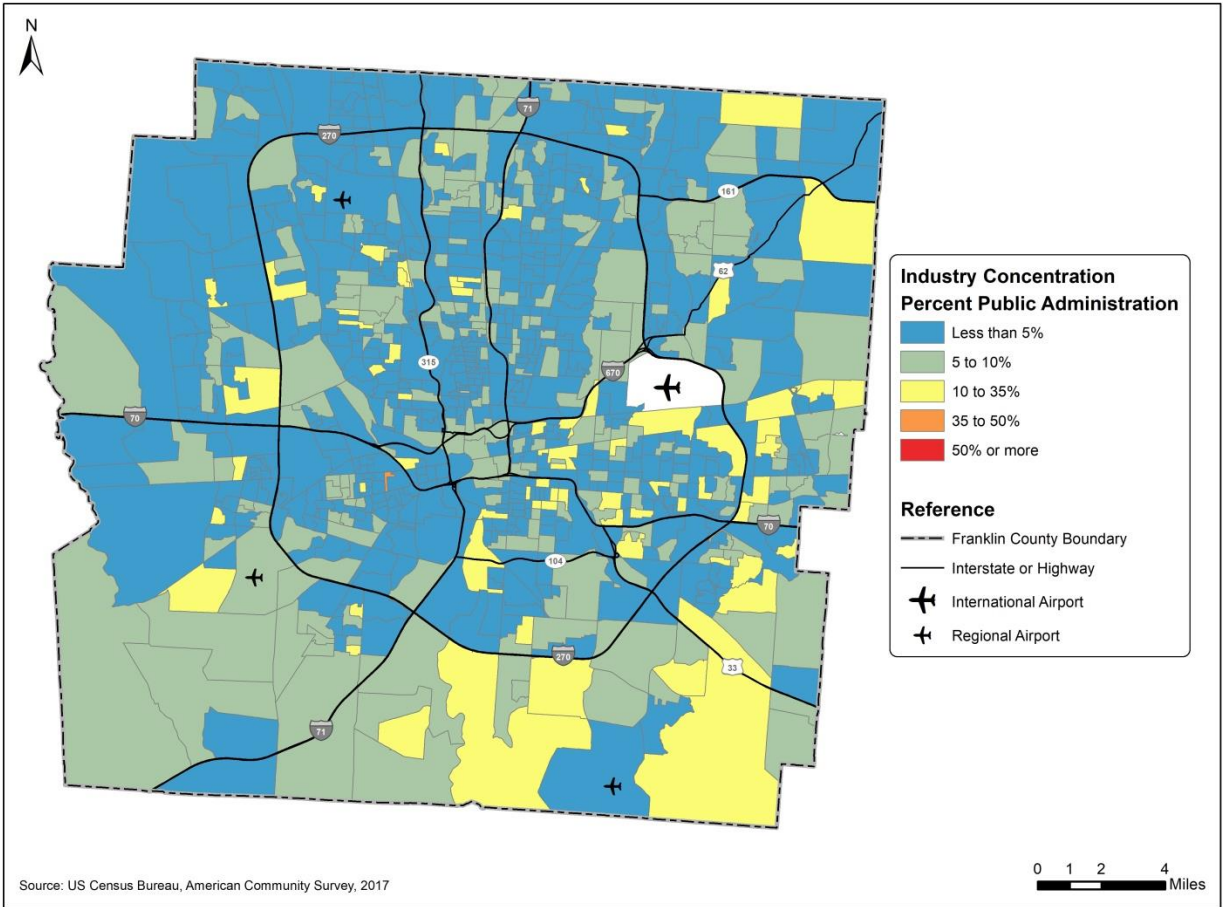
Franklin County's industry location quotient (LQ) quantifies how concentrated the County's jobs are in comparison to the nation. Six industries have a relative concentration in the County with an LQ between 1.7 and 1.1: Finance and insurance, Wholesale trade, Transportation and warehousing, Health care and social assistance, Public administration, and Administrative and waste services. The areas of Franklin County where these industries are most concentrated in terms of jobs per acre vary. Only finance and public administration have some presence in the center of the County. Finance has a greater presence south and east; wholesale concentrates in the northwest; the epicenter of transportation and warehousing is around Rickenbacker; administrative and waste services swing from the northeast to the southeast; and health care dominates outside of the Innerbelt.

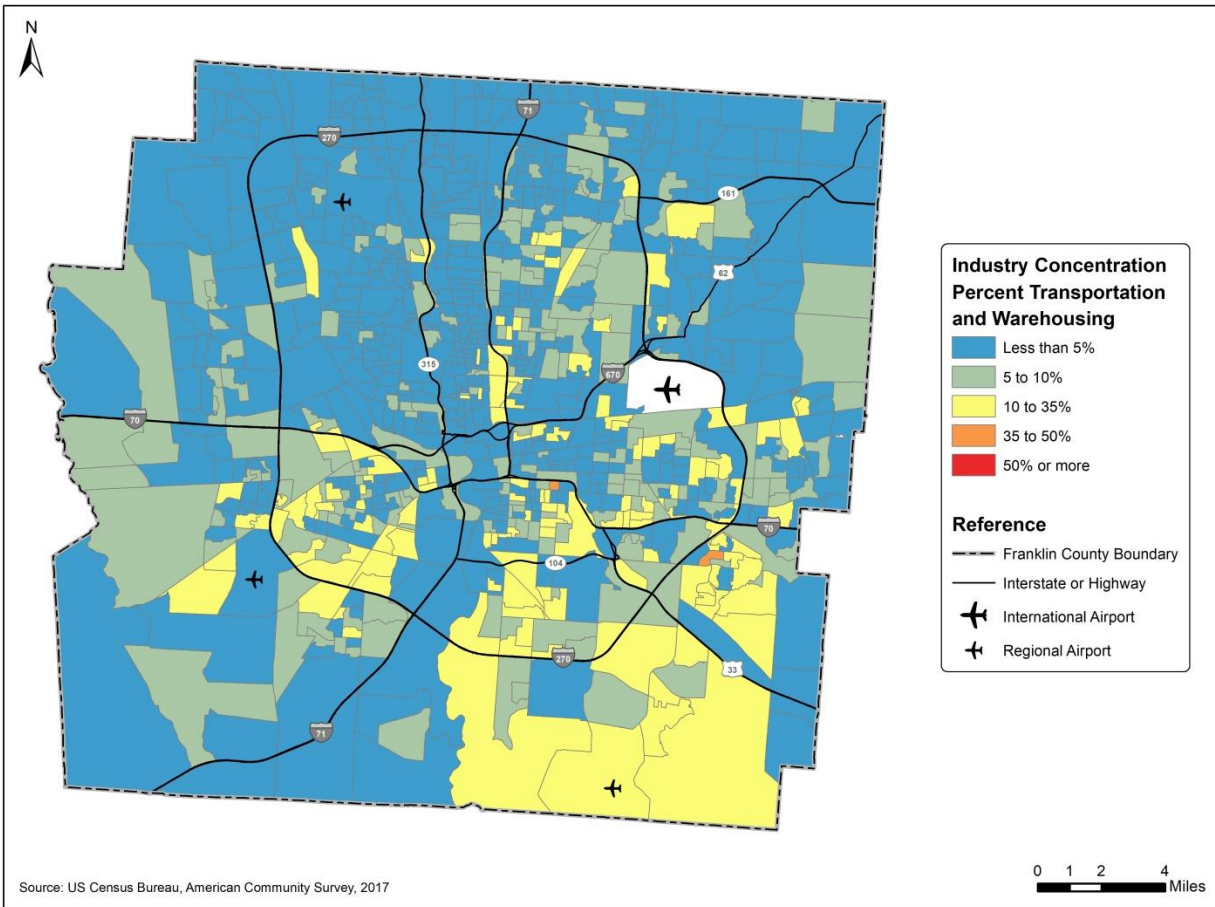
Location Quotient, 2017, Columbus OH MSA				
Share of Jobs by NAICS Industry Sector				
Industry		United States	Columbus OH MSA	Columbus OH MSA LQ
	Finance and insurance	4.6%	8.0%	1.7
	Wholesale trade	2.6%	2.9%	1.1
	Transportation and warehousing	4.6%	5.1%	1.1
	Health care and social assistance	14.0%	15.1%	1.1
	Public administration	4.6%	4.9%	1.1
	Administrative and waste services	4.2%	4.5%	1.1
	Management of companies and enterprises	0.1%	0.1%	1.0
	Information	2.0%	2.0%	1.0
	Retail trade	11.2%	11.1%	1.0
	Professional and technical services	7.2%	6.9%	1.0
	Educational services	9.1%	8.9%	1.0
	Accommodation and food services	7.5%	7.2%	1.0
	Utilities	0.8%	0.8%	0.9
	Manufacturing	10.1%	9.3%	0.9
	Other services, except public administration	4.9%	4.5%	0.9
	Arts, entertainment, and recreation	2.2%	1.8%	0.8
	Real estate and rental and leasing	2.0%	1.6%	0.8
	Construction	6.6%	4.9%	0.7
	Agriculture, forestry, fishing and hunting	1.2%	0.5%	0.4
	Mining, quarrying, and oil and gas extraction	0.5%	0.1%	0.2
Total		100.0%	100.0%	
Source: U.S. Census Bureau, 1-Year American Community Survey Table S2403				

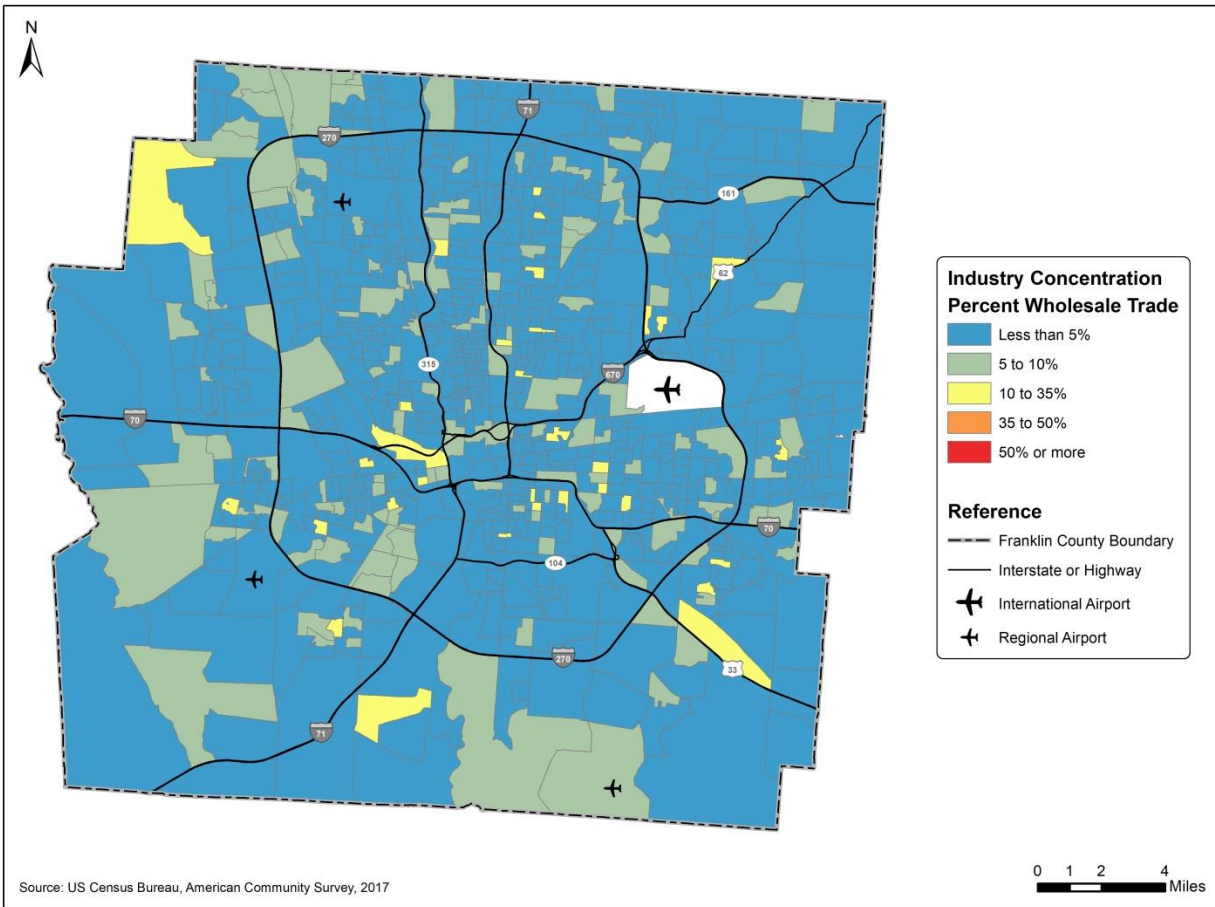






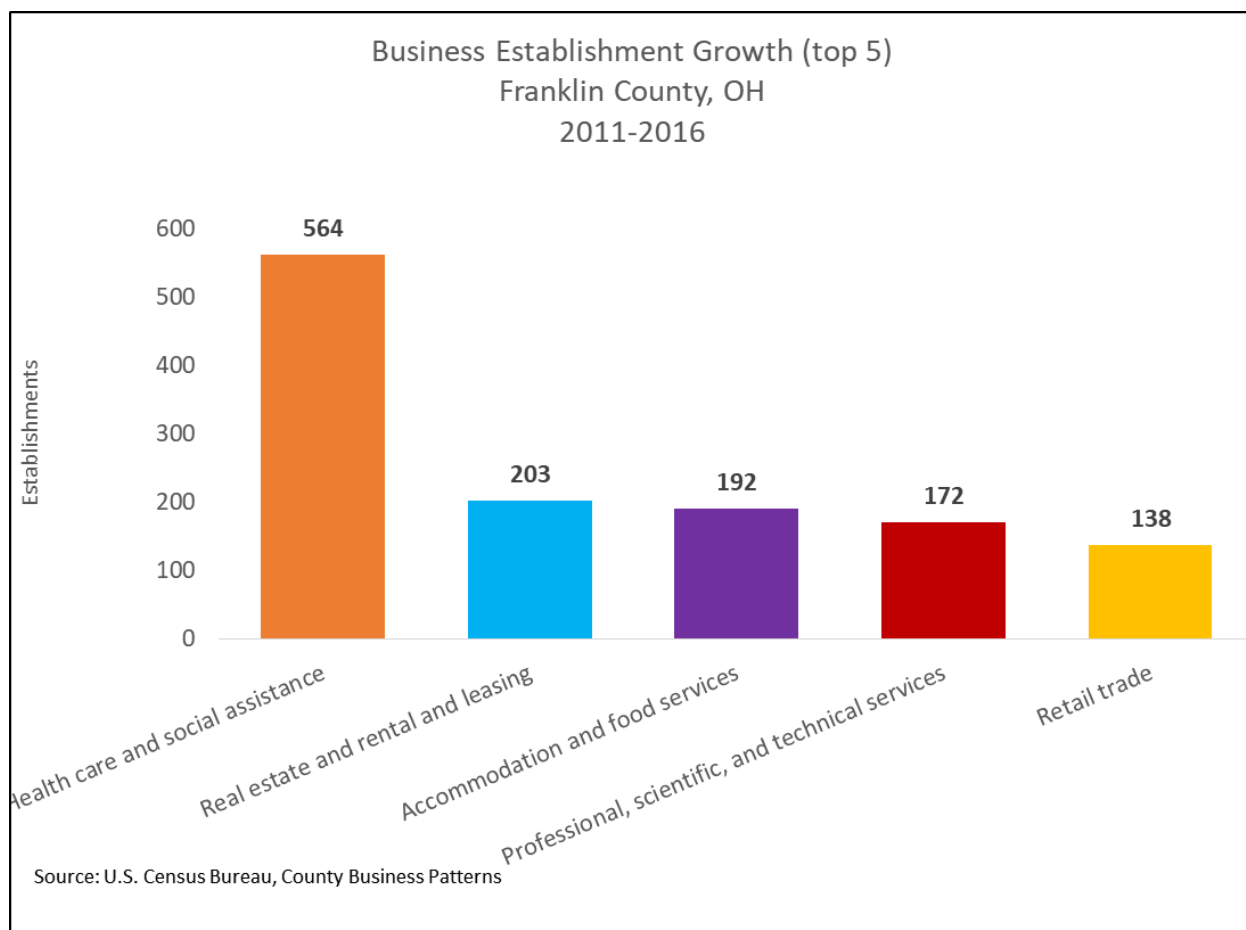




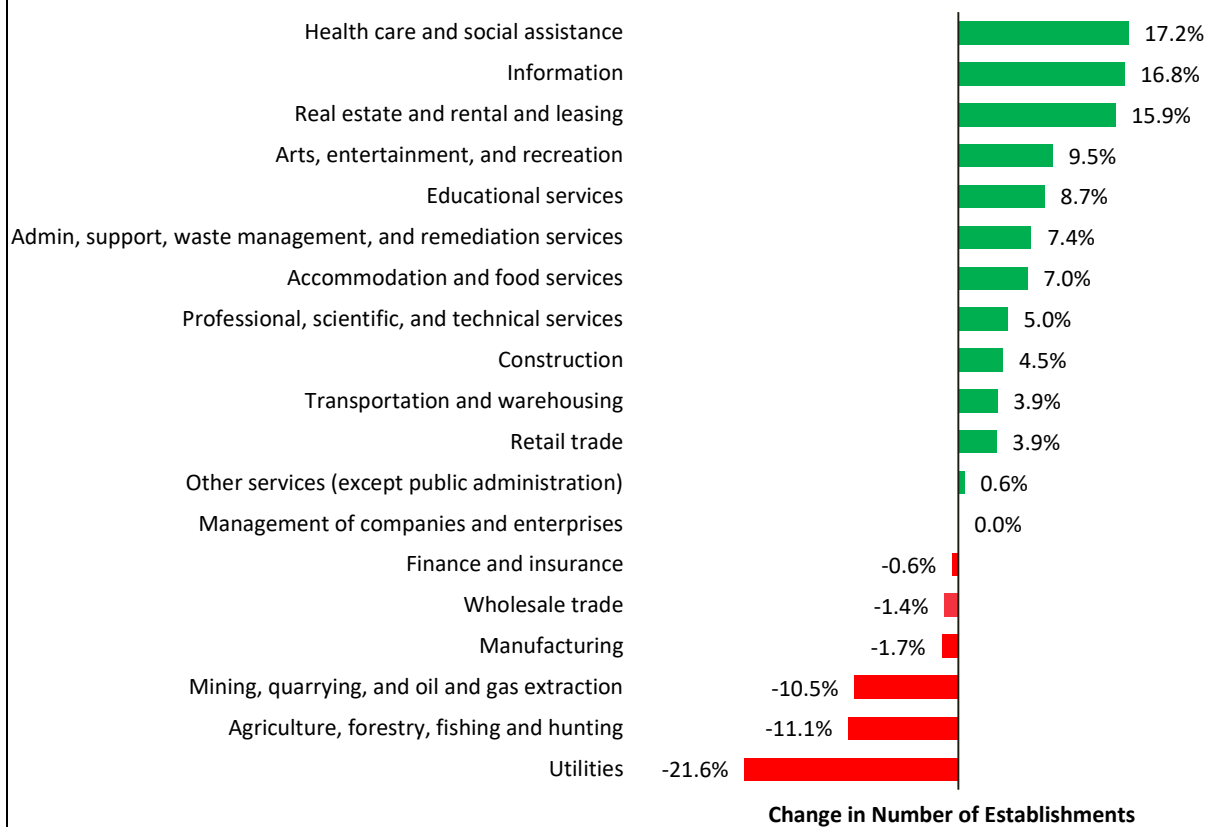


Health Care Industry Dominance

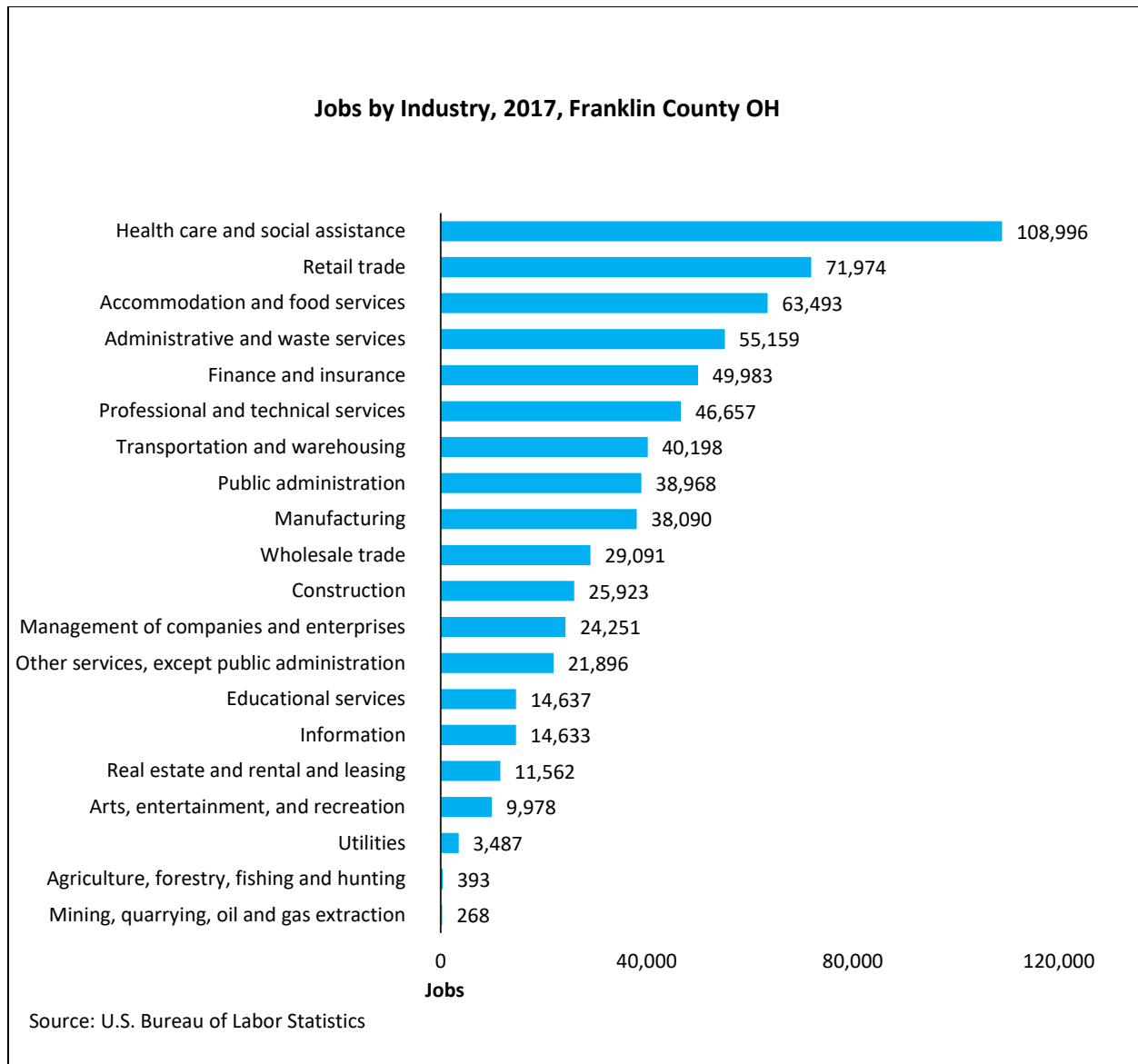
The health care industry dominates establishment growth and jobs. Between 2011 and 2016 an estimated 564 additional business establishments in the health care and social assistance industry were added in Franklin County. It is the fastest growing and largest industry with a 17.2% increase in five years. It represents more than one out of every six jobs in Franklin County, hosting more than a quarter of all new jobs (a gain of over 18,500 jobs). The new health care jobs are nearly triple the second fastest growing industry, transportation and warehousing. The other fast growing sectors include accommodation and food services, construction, and transportation and warehousing, which collectively account for a quarter of all new jobs over the past five years.



**Change in Business Establishments by Industry
Franklin County, OH 2011 to 2016**

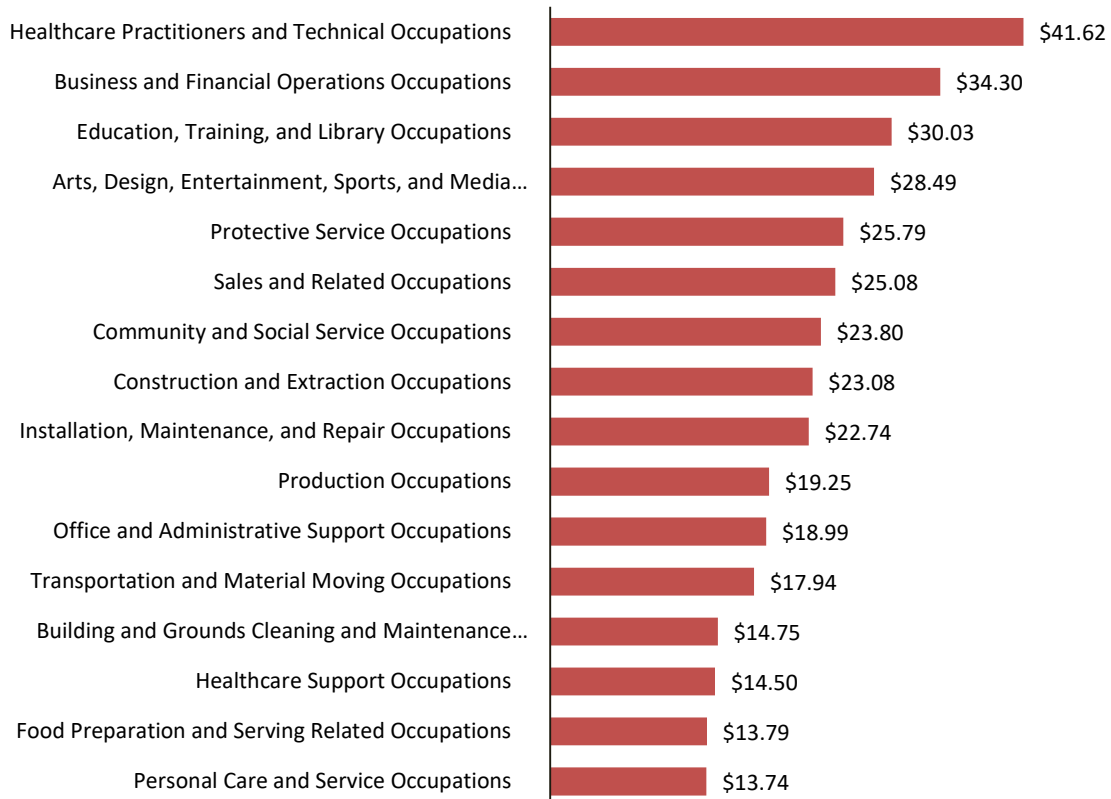


Source: U.S. Census Bureau, County Business Patterns



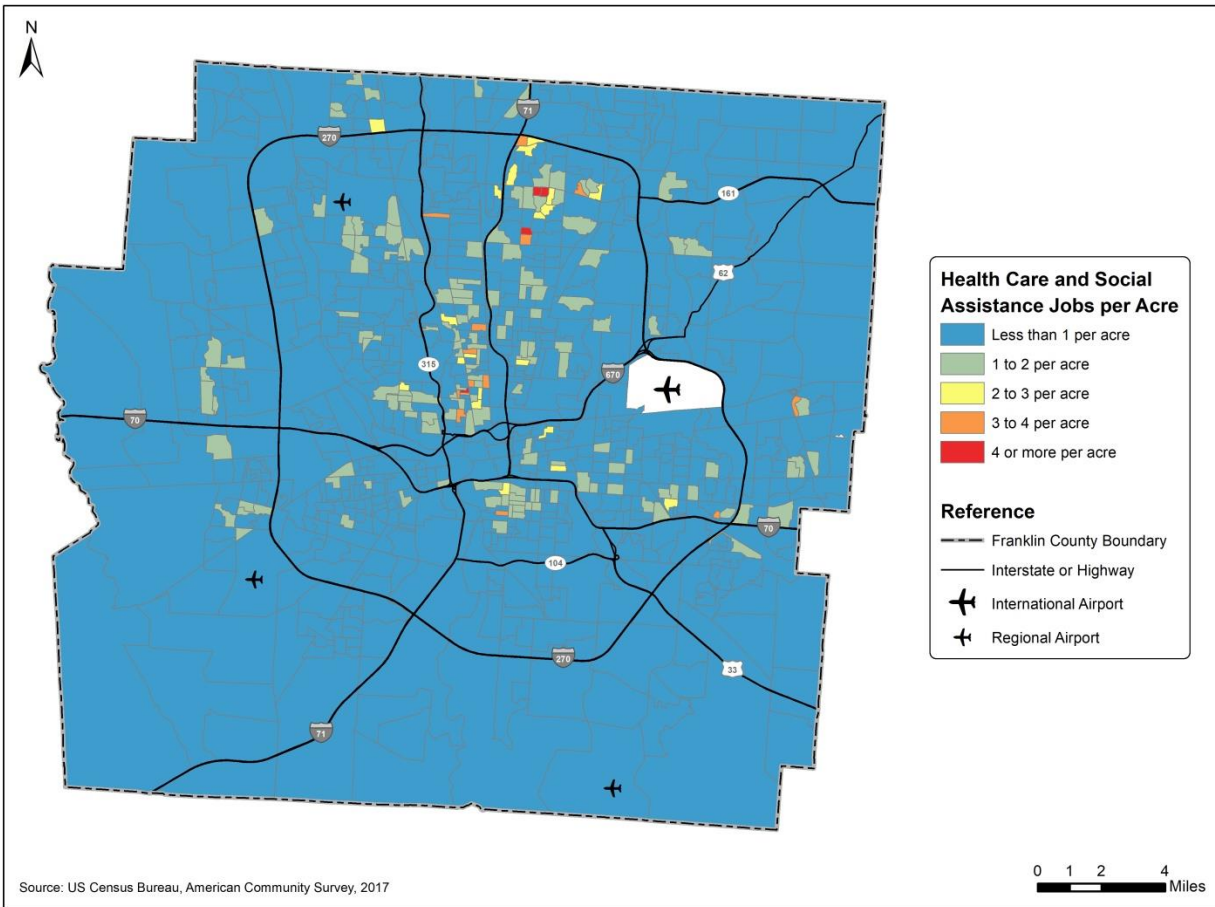
Health and professional services industries have occupations that are among the highest paying average hourly wages in the County at \$41.62 and 34.30, respectively. However, health care support occupations, part of this industry, were only paying \$14.50/hour on average, exhibiting nuance in the growth of this industry. It is also important to recall that the health care industry attracted 10% of in-migrants, but about three-quarters of those settled for below \$50,000 in wages and more than a third make less than \$25,000 (see above in [people capacity section under the threat of importing people](#)). Almost all of the in-migrants in accommodation and food services jobs make less than \$25,000.

**Average Hourly Wage by Occupation, 2017, Columbus OH MSA
Full-Time Workers**

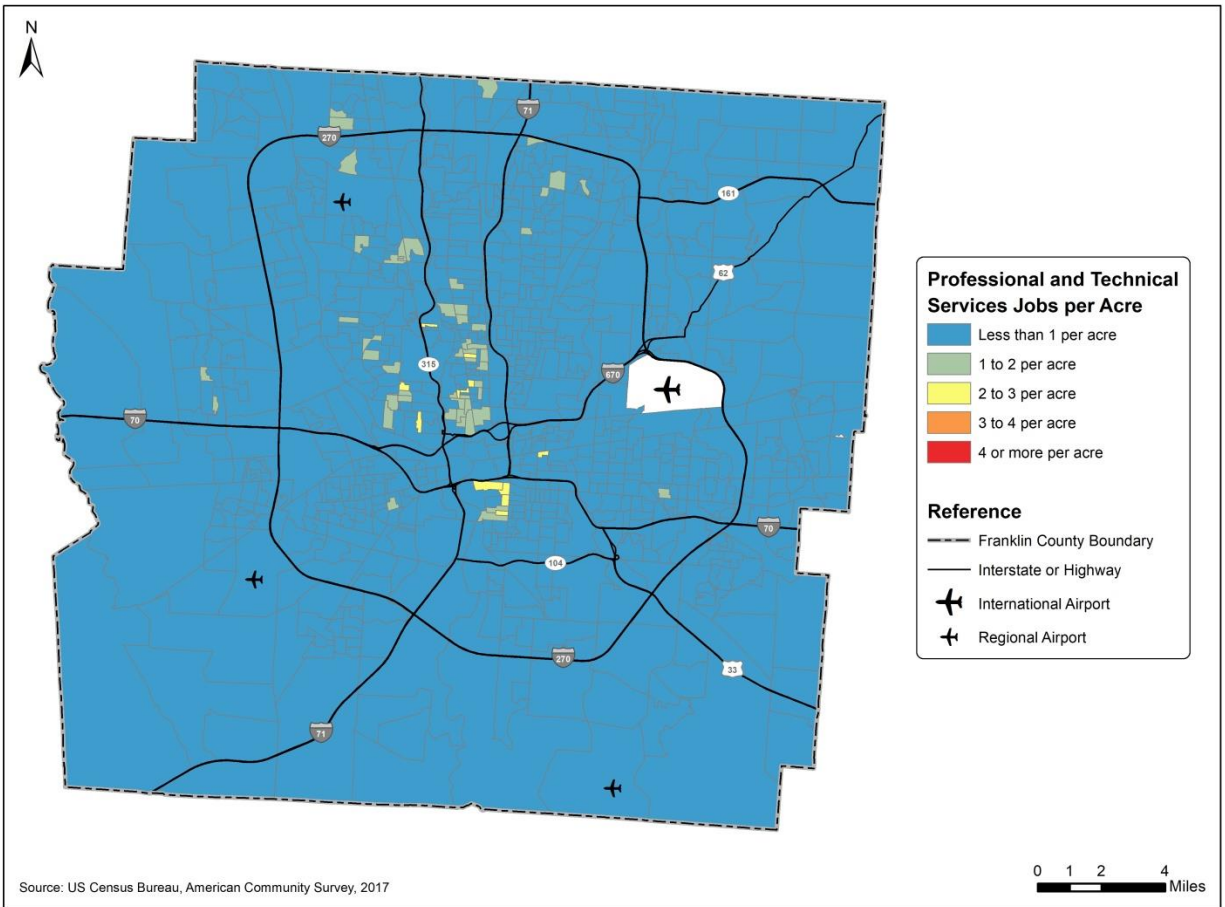


Average Hourly Wage

Source: U.S. Bureau of Labor Statistics



During the same five year period, an estimated 172 Professional, Scientific, and technical services business establishments were added in Franklin County, which represents a 5% increase as an industry on par with national average (LQ 1), and located more in the Short North and just to the west. The industry may represent an opportunity if the growth continues since it contributed 46,657 of Franklin County's 669,637 jobs in 2017. Information establishments also had an impressive 16.8% gain from 2011 to 2016, experiencing larger year-over-year percentage growth in establishments at 8% in both 2014 and 2016. However, it holds a smaller portion of the economy, with 14,633 total jobs in 2017. But yet again, the information industry holds promise since it was one.



Year-over-Year Growth of Establishments by Industry								
Industry	2009	2010	2011	2012	2013	2014	2015	2016
Agriculture, forestry, fishing and hunting	-20%	-13%	29%	-22%	14%	-25%	0%	33%
Mining, quarrying, and oil and gas extraction	-8%	-14%	0%	0%	0%	0%	-11%	0%
Utilities	1%	8%	-11%	-14%	6%	0%	1%	-16%
Construction	-8%	-3%	-4%	-2%	0%	2%	2%	2%
Manufacturing	-6%	-3%	-2%	-1%	-3%	3%	0%	0%
Wholesale trade	-2%	0%	0%	0%	-1%	0%	-1%	0%
Retail trade	-2%	0%	0%	2%	0%	1%	1%	0%
Transportation and warehousing	3%	0%	1%	-1%	-1%	0%	7%	-1%
Information	-5%	-2%	0%	6%	-4%	8%	-1%	8%
Finance and insurance	-5%	-4%	-4%	0%	0%	-1%	-1%	2%
Real estate and rental and leasing	-8%	-2%	-4%	4%	1%	1%	4%	5%
Professional, scientific, and technical services	-2%	1%	0%	0%	1%	2%	1%	1%
Management of companies and enterprises	12%	-2%	-14%	-3%	0%	3%	0%	1%
Administrative and support and waste management and remediation services	-6%	-2%	0%	1%	3%	1%	0%	2%
Educational services	3%	6%	4%	8%	6%	-2%	2%	-4%
Health care and social assistance	1%	3%	3%	2%	3%	3%	3%	5%
Arts, entertainment, and recreation	-2%	-3%	7%	1%	0%	1%	4%	3%
Accommodation and food services	0%	0%	4%	2%	1%	0%	1%	3%
Other services (except public administration)	10%	2%	-14%	1%	0%	-1%	1%	0%
Total	-1%	0%	-2%	1%	1%	1%	1%	2%

Source: U.S. Census Bureau, County Business Patterns

Business Strengths Wrap

Business growth is occurring, but most sectors are just about the size of the national economy. The one sector with an advantage, finance and insurance (LQ 1.7), now accounts for 13% of the job base and gained about 4,600 jobs in the past five years. But it actually lost establishments, and changes in the industry seem to be limiting its ability to contribute ever-more strongly to the economy. Health care is a local serving industry and its dominance creates both advantages and disadvantages, particularly related to wages.

Determining what entrepreneurial ventures are growing by industry is essential to understanding how business growth may be changing in the region. The Kauffman Indices of Entrepreneurship Activity for 2017 provides insight into this.⁵⁸ Of the three dimensions of entrepreneurship, the Columbus region ranked 4th in Growth Entrepreneurship out of 39 metro areas, as measured by growth in both revenue

⁵⁸ Ewing Marion Kauffman Foundation, "Kauffman Indices of Entrepreneurship Activity: 2017 Metro Area and City Trends," 2017, <https://www.kauffman.org/historical-kauffman-index/reports>.

and employment. However, the region doesn't fare as well on the other two indices, discussed below in the weakness section, and awareness of what is behind these data is an imperative step.

Weakness: Business

Manufacturing Losses Economic Impact

Although the growth in industry establishments exhibit improvement since the recession, the losses of note over the period of 2008-2016 in manufacturing and mining are important given the relative concentration of these industries in the Franklin County economy.

The Federal Reserve Bank of Chicago's peer-city identification tool offers an examination of Columbus manufacturing over the period of 2000-2017. The tool groups 960 cities into peer cohorts across four themes: equity (SES), economic resilience, housing, and an outlook for next generation concerns,⁵⁹ each with five indicators.⁶⁰ Economic resilience speaks to issues related to economic diversification by considering current conditions and trends in manufacturing employment, labor force participation, and unemployment. The City of Columbus has a lower share of workers in manufacturing or related fields⁶¹ at around 77% in comparison to the entire sample of cities (94%), but larger than the median for its peer group at 70%.⁶² However, since 1970, Columbus' manufacturing labor share decline was much greater and at 66.5% only Orem, Utah had a greater decline at 68.8%. Columbus lags behind in the economic resilience mostly to the significance of its manufacturing losses and how it filters through to median family income,⁶³ where Columbus is the lowest in the peer group, \$58,475—a 17.2% decline over 2000 – 2017. The average peer group declines also, but it declines less (11.6%), and the group incomes started at a higher level (\$66, 094). The story is similar for how Columbus fares in terms of equity measures (poverty rate and inequality of wages).⁶⁴

⁵⁹ Federal Reserve Bank of Chicago, "Peer City Identification Tool," 2017, <https://www.chicagofed.org/region/community-development/data/pcit>.

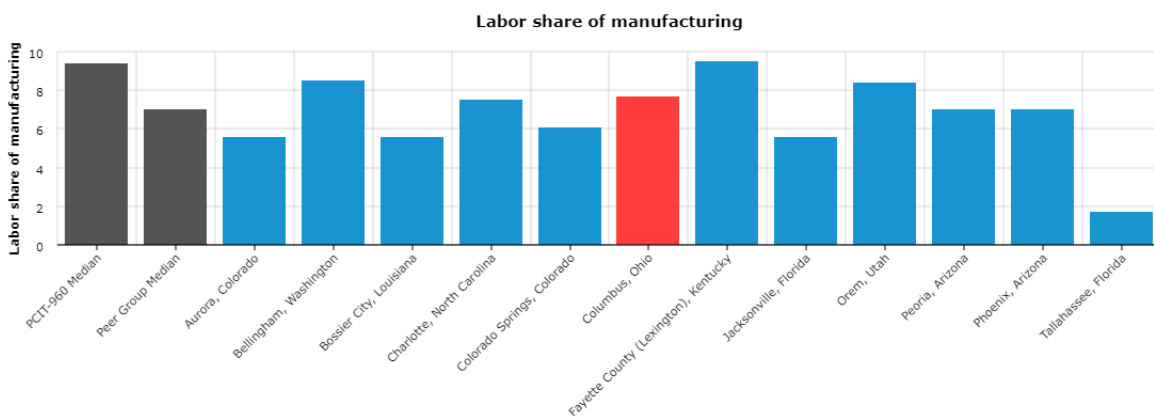
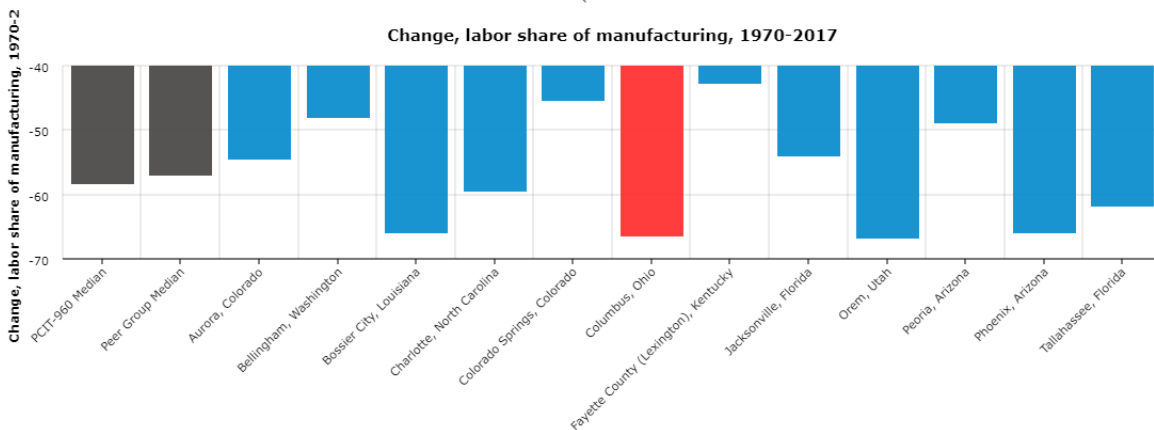
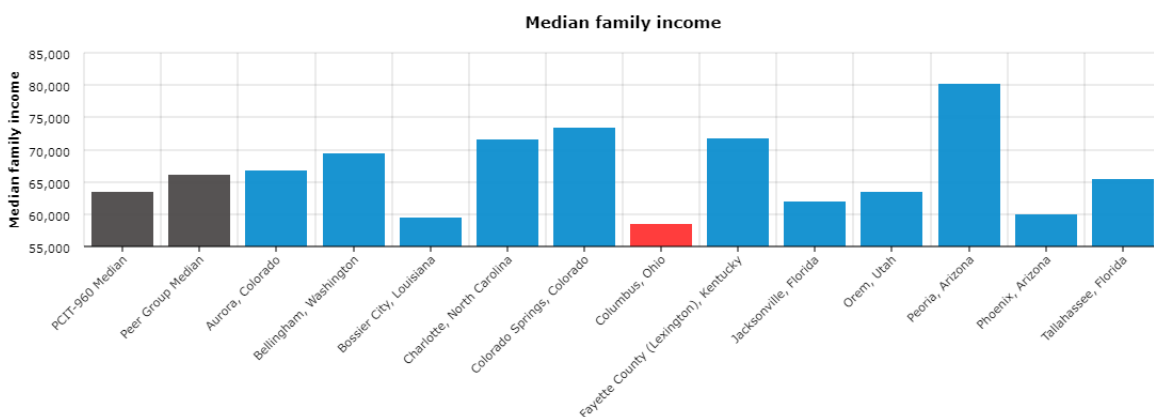
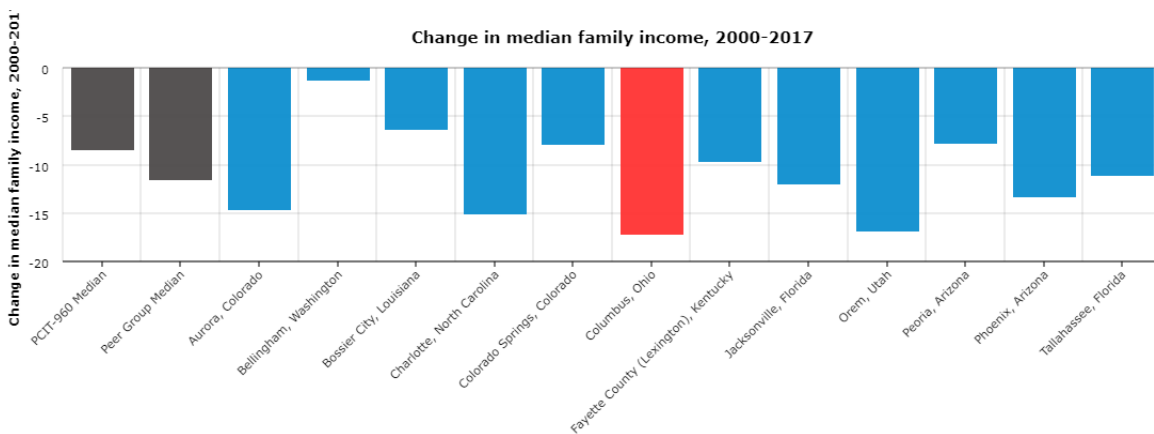
⁶⁰ Although the tool is a city analysis, with seven of 10 people in Franklin County living in the City of Columbus and the City having over 40% of the share of the entire metropolitan area's population, it reveals insights.

⁶¹ The labor share of manufacturing is the percentage of all employed workers in a city employed in manufacturing, as estimated by the 2013-2017 5-year American Community Survey.

⁶² The peers for economic resilience are Aurora, Colorado, Bellingham, Washington, Bossier City, Louisiana, Charlotte, North Carolina, Colorado Springs, Colorado, Columbus, Ohio, Fayette County (Lexington), Kentucky, Jacksonville, Florida, Orem, Utah, Peoria, Arizona, Phoenix, Arizona, Tallahassee, Florida.

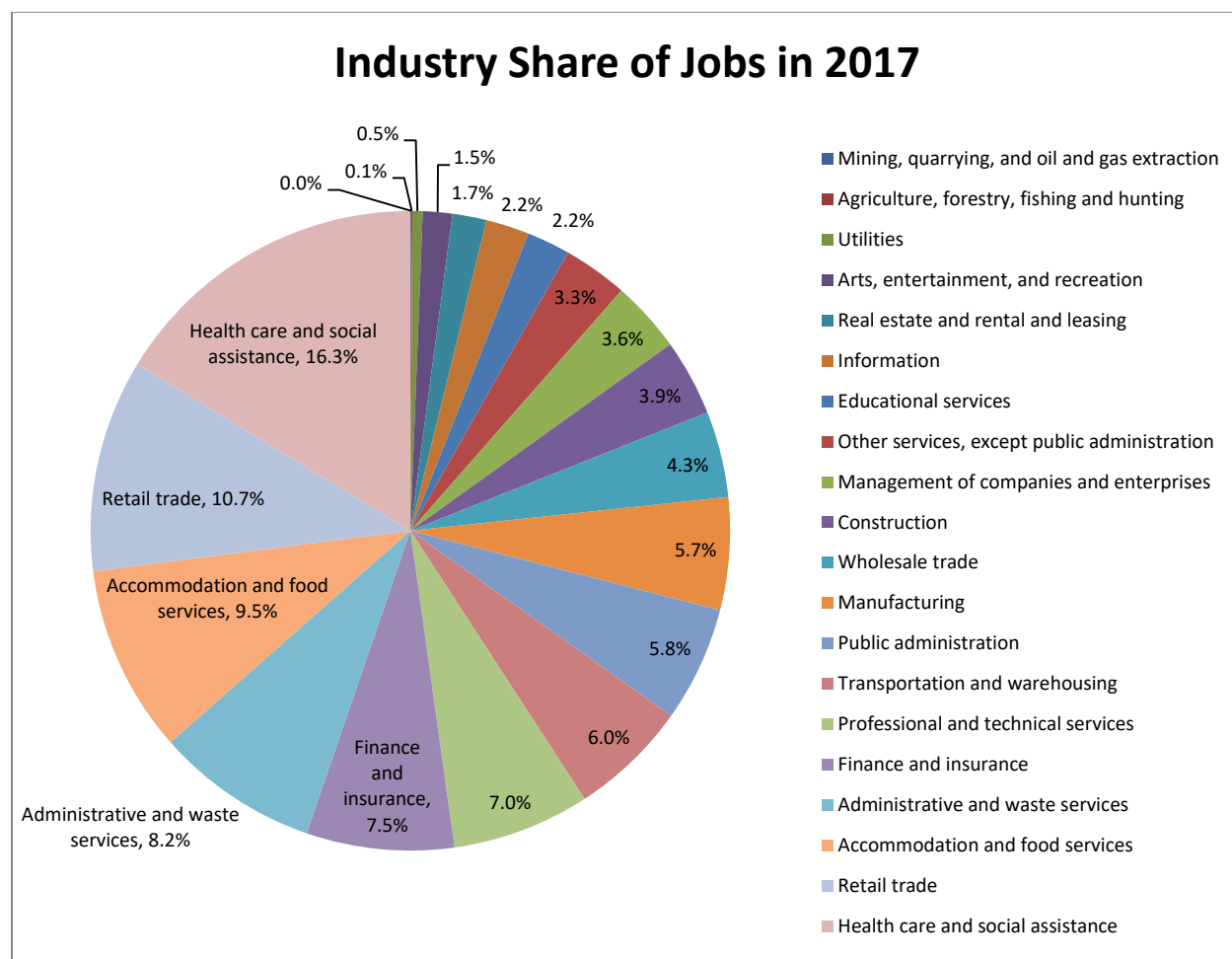
⁶³ Median family income is drawn from 2013-2017 5-year American Community Survey estimates.

⁶⁴ The peers for equity theme are the cities of Bowling Green, Kentucky, Dallas, Texas, Houston, Texas, Knoxville, Tennessee, and Rome, Georgia, and Springfield, Missouri.

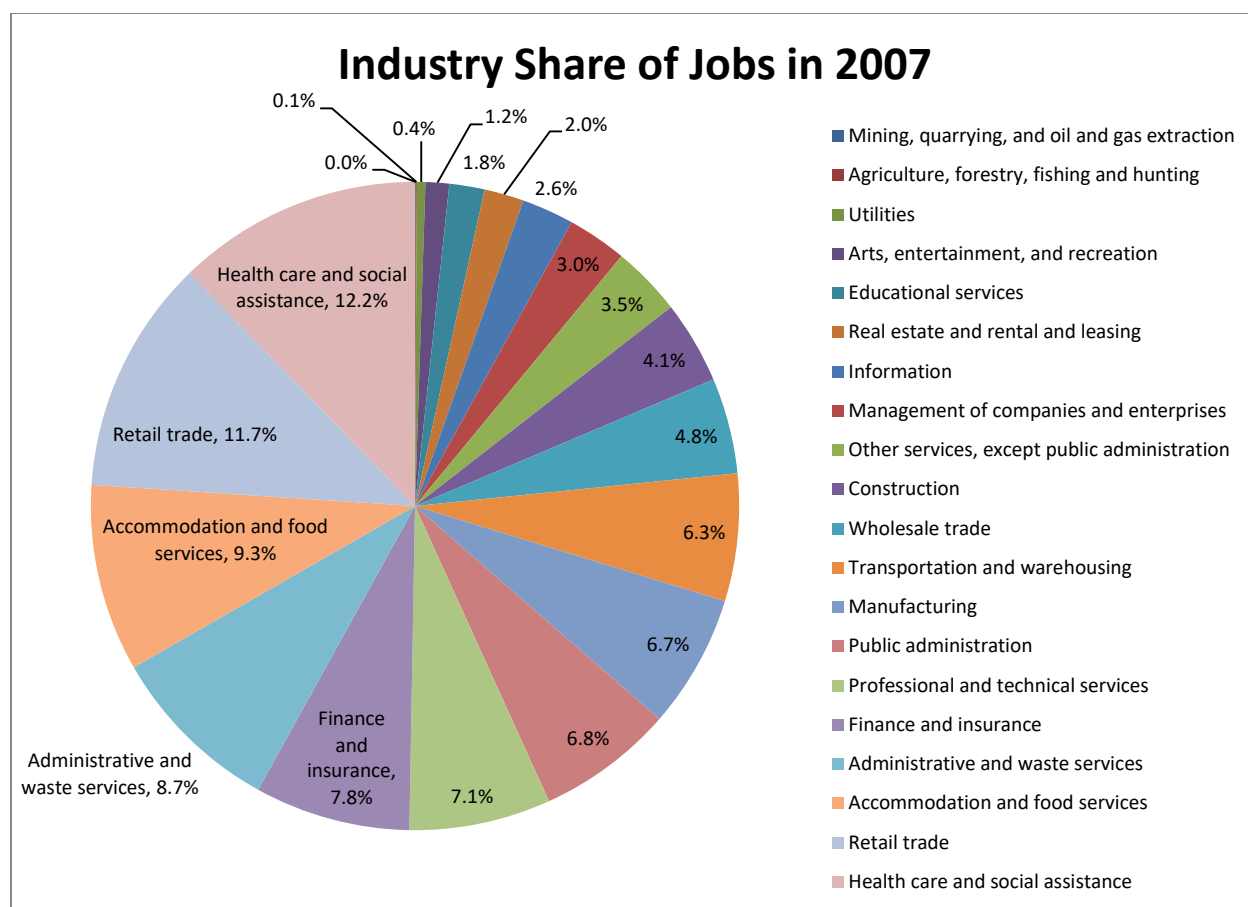


Lack of Priority Sectors

The economic base in Columbus-Franklin County is fairly diversified—in 2017 five industries account for 52% of jobs, and 10 industries account for 85%. The distribution of industry and sectors has been static over the past decade. Although such diversification often provides resistance to economic shocks, the region suffers from lack of dynamism in these industries.



Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages



Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages

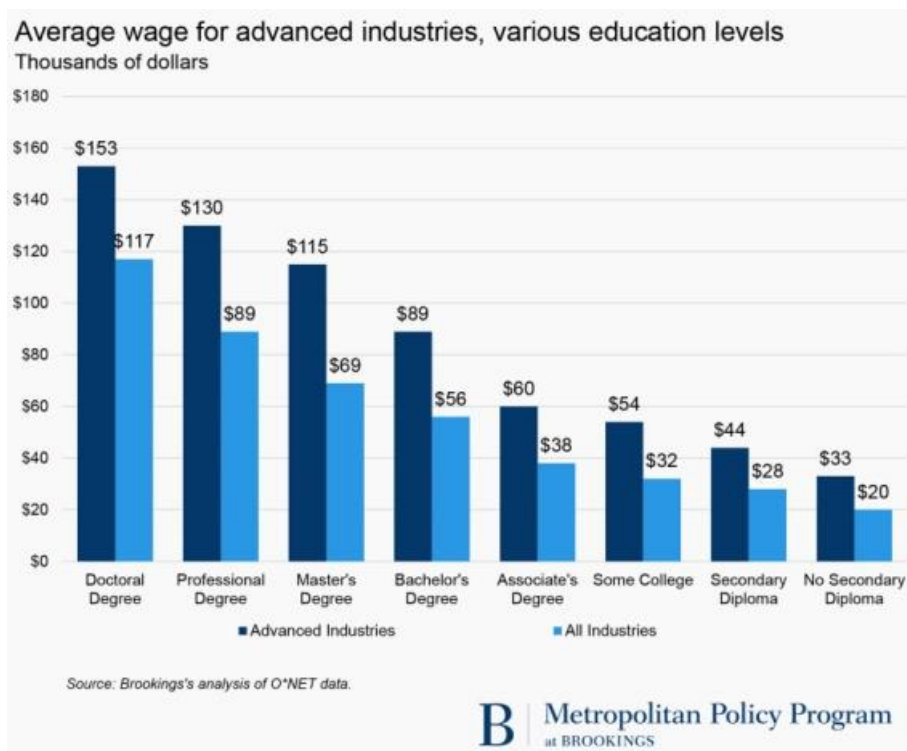
The “business as usual” trend and path dependency seem to indicate a need to identify and invest in priority sectors that have potential for equitable growth and provide solid economic opportunity for residents. The absence means that investment paths of many partners, including Franklin County, reflect a “let things come to you” attitude.

Brookings claims that advanced industries⁶⁵ are worthy of the region’s attention. These industries are broadly construed as the “tech” sector, but they are broader and led the post-recession employment recovery. They offer a level of dynamism that Columbus has not seen and could contribute to helping the region pave a path to sound competitiveness and equitable prosperity. The average annual pay is over 60% higher at \$83,014.⁶⁶ Average wages across all education levels are also higher in advanced industries. However, in the latest 2013-2015 rankings, Columbus has only 7.7% of its jobs in advanced industries (81,913 in 2015). These support another 65,530 indirect jobs and 12.1% of the region’s

⁶⁵ Advanced industries are as those that: 1) Spend at least \$450 per worker per year on R&D and 2) employ at least 20 percent of their workforce in STEM-intensive occupations. The definition identifies 50 4-digit NAICS industries across the manufacturing, energy, and services sectors that together constitute the advanced industries super-sector.

⁶⁶ See metro profiles: https://www.brookings.edu/wp-content/uploads/2016/07/metro_20160805_advancedindustriesprofiles.zip

output. For comparison, its employment share rank is only 61 out of 100 of the nation's largest metros, and only ranks 74th in output and 76th in jobs.⁶⁷ Unfortunately, Columbus' *annual average growth* in advanced industries is only 1.4% in output and 0.45% in jobs, compared to the national average of 2.7% and 2.46%, respectively. A focus on advanced industries could start with deeper analysis of the largest and growing industries.



⁶⁷ Mark Muro Hart Siddharth Kulkarni, and David M., "America's Advanced Industries: New Trends," *Brookings* (blog), August 4, 2016, <https://www.brookings.edu/research/americas-advanced-industries-new-trends/>.

Columbus, OH: The five largest detailed advanced industries by number of jobs, 2015			
Industry	Number of jobs, 2015	Share of all advanced industries jobs, 2015	Growth, 2013–2015
Computer Systems Design and Related Services	17,605	21.5%	-0.4%
Motor Vehicle Parts Manufacturing	9,668	11.8%	+0.1%
Architectural, Engineering, and Related Services	9,252	11.3%	+6.5%
Scientific Research and Development Services	6,539	8.0%	+0.8%
Management, Scientific, and Technical Consulting Services	5,714	7.0%	+5.9%

Source: Mark Muro Hart, Siddharth Kulkarni, and David M., “America’s Advanced Industries: New Trends,” August 2016, <https://www.brookings.edu/research/americas-advanced-industries-new-trends/>.

Lackluster Entrepreneurial Ecosystem and Diversification of Support

Other regional studies have found that the Columbus region struggles with taking ideas to market despite its size and university and federal lab presence. The Kauffman Indices of Entrepreneurship Activity for 2017 provides insight into the diversity of entrepreneurship and small business in the region.⁶⁸ As mentioned under business strengths, the region fares well in Growth Entrepreneurship, but its Startup Activity, which measures new business creation, market opportunity, and startup density is only 23rd among the 39 metros. In terms of Main Street Entrepreneurship, it was 16th suggesting a stronger prevalence and density of local small business ownership, with less than 50 employees.

⁶⁸ Ewing Marion Kauffman Foundation, “Kauffman Indices of Entrepreneurship Activity: 2017 Metro Area and City Trends.”

Metropolitan Areas : Growth Entrepreneurship - Rate of Startup Growth

Metro Area	Rank	Rate of Startup Growth	Share of Scale-ups	High Growth Company Density	Rank Previous Year
Washington-Arlington-Alexandria	1	75.46%	2.30%	306.8	1
Austin-Round Rock-San Marcos	2	84.75%	2.26%	238.1	2
Columbus	3	96.33%	2.51%	158.5	4
Nashville-Davidson-Murfreesboro-Franklin	4	95.56%	2.09%	155.1	5
Atlanta-Sandy Springs-Marietta	5	112.56%	1.34%	191.4	15
San Jose-Sunnyvale-Santa Clara	6	115.78%	2.21%	94.4	3
San Francisco-Oakland-Fremont	7	106.91%	1.89%	125.4	8
Boston-Cambridge-Quincy	8	87.13%	2.04%	135.5	6
Minneapolis-St. Paul-Bloomington	9	121.29%	1.70%	102.1	16
Indianapolis-Carmel	10	72.90%	2.20%	117.2	20
Dallas-Fort Worth-Arlington	11	77.41%	2.06%	120.8	11
San Diego-Carlsbad-San Marcos	12	81.21%	1.65%	148.3	10
Denver-Aurora-Broomfield	13	74.89%	1.54%	143.8	13
San Antonio-New Braunfels	14	88.42%	2.49%	40.8	7
Phoenix-Mesa-Glendale	15	63.25%	1.72%	137.6	12
Charlotte-Gastonia-Rock Hill	16	74.01%	1.98%	100.5	9
Baltimore-Towson	17	61.21%	2.02%	112.4	17
Cleveland-Elyria-Mentor	18	70.03%	1.78%	119.1	19
Houston-Sugar Land-Baytown	19	78.30%	2.03%	86.4	14
Seattle-Tacoma-Bellevue	20	80.37%	1.46%	126.2	21
Portland-Vancouver-Hillsboro	21	93.84%	1.13%	114.8	31
Cincinnati-Middletown	22	57.55%	1.52%	128.2	18
Pittsburgh	23	79.74%	1.99%	53.1	25
Philadelphia-Camden-Wilmington	24	68.97%	1.51%	107.6	22
Virginia Beach-Norfolk-Newport News	25	72.86%	1.76%	71.5	28
Tampa-St. Petersburg-Clearwater	26	71.40%	1.18%	116	24
Chicago-Joliet-Naperville	27	70.47%	1.30%	95	30
Kansas City	28	33.85%	1.73%	102.2	23
Orlando-Kissimmee-Sanford	29	59.95%	1.01%	121.8	27
Sacramento-Arden-Arcade-Roseville	30	63.94%	1.56%	55.1	37
Los Angeles-Long Beach-Santa Ana	31	54.09%	1.27%	90.6	33
New York-Northern New Jersey-Long Island	32	79.29%	1.07%	75.4	34
Milwaukee-Waukesha-West Allis	33	33.16%	1.88%	62.8	26
Las Vegas-Paradise	34	54.10%	1.66%	49.4	32
St. Louis	35	61.04%	1.38%	47.6	29
Miami-Fort Lauderdale-Pompano Beach	36	60.30%	0.83%	80.6	39
Detroit-Warren-Livonia	37	65.17%	0.90%	67.6	40
Riverside-San Bernardino-Ontario	38	51.21%	1.37%	43.8	38
Providence-New Bedford-Fall River	39	47.11%	1.48%	30.3	36
Jacksonville	40	-16.75%	1.41%	77.9	

Source: Kauffman Foundation, 2017

Metropolitan Areas : Startup Activity - Rate of New Entrepreneurs

Metro Area	Rank	Rate of New Entrepreneurs	Opportunity Share of New Entrepreneurs	Startup Density	Rank Previous Year
Miami-Fort Lauderdale-Pompano Beach	1	0.56%	81.09%	107.8	2
Austin-Round Rock-San Marcos	2	0.51%	84.73%	104.5	1
Los Angeles-Long Beach-Santa Ana	3	0.56%	80.03%	92.3	3
San Diego-Carlsbad-San Marcos	4	0.49%	82.54%	95.9	11
Las Vegas-Paradise	5	0.42%	81.93%	120.7	5
San Antonio-New Braunfels	6	0.38%	89.97%	87.2	14
New York-Northern New Jersey-Long Island	7	0.41%	84.43%	86.5	7
Phoenix-Mesa-Glendale	8	0.38%	87.15%	92.1	10
Houston-Sugar Land-Baytown	9	0.40%	81.93%	92.6	6
Denver-Aurora-Broomfield	10	0.39%	82.87%	92.3	8
Dallas-Fort Worth-Arlington	11	0.37%	85.18%	94.2	12
Atlanta-Sandy Springs-Marietta	12	0.43%	75.49%	89.9	15
Riverside-San Bernardino-Ontario	13	0.36%	80.93%	92.4	18
San Francisco-Oakland-Fremont	14	0.37%	77.78%	86.5	4
Kansas City	15	0.37%	77.81%	83.6	19
San Jose-Sunnyvale-Santa Clara	16	0.26%	90.17%	86.9	9
Charlotte-Gastonia-Rock Hill	17	0.37%	71.21%	87.5	20
Cincinnati-Middletown	18	0.30%	89.73%	61.6	25
Tampa-St. Petersburg-Clearwater	18	0.34%	74.69%	89	17
Sacramento-Arden-Arcade-Roseville	20	0.31%	80.17%	81	27
Boston-Cambridge-Quincy	21	0.33%	79.85%	68.2	20
Orlando-Kissimmee-Sanford	22	0.25%	80.25%	105.5	23
Columbus	23	0.28%	84.43%	66.2	13
Seattle-Tacoma-Bellevue	24	0.25%	80.84%	85	26
Washington-Arlington-Alexandria	25	0.28%	76.51%	78	24
St. Louis	26	0.23%	77.39%	96.7	36
Portland-Vancouver-Hillsboro	27	0.26%	76.43%	82.8	32
Cleveland-Elyria-Mentor	28	0.19%	95.99%	54.3	37
Nashville-Davidson-Murfreesboro-Franklin	29	0.27%	72.43%	82.2	16
Jacksonville	30	0.11%	95.90%	89.4	28
Chicago-Joliet-Naperville	31	0.22%	80.40%	74.7	30
Detroit-Warren-Livonia	32	0.25%	76.01%	71	31
Virginia Beach-Norfolk-Newport News	33	0.18%	86.54%	68.1	29
Providence-New Bedford-Fall River	34	0.18%	87.32%	61	35
Baltimore-Towson	35	0.20%	81.02%	69.2	22
Philadelphia-Camden-Wilmington	36	0.21%	75.89%	69.7	34
Minneapolis-St. Paul-Bloomington	37	0.20%	76.31%	72.5	38
Indianapolis-Carmel	38	0.16%	71.70%	72.7	33
Milwaukee-Waukesha-West Allis	39	0.15%	67.53%	60.7	39
Pittsburgh	39	0.13%	71.92%	57.2	40

Source: Kauffman Foundation, 2017

Metropolitan Areas : Main Street Entrepreneurship - Rate of Business Owners

Metro Area	Rank	Survival Rate	Rate of Business Owners	Established Small Business Density	Rank Previous Year
Pittsburgh	1	53.78%	5.25%	694.2	2
Boston-Cambridge-Quincy	2	53.97%	5.51%	668.3	1
Portland-Vancouver-Hillsboro	3	51.16%	7.56%	615.1	4
San Francisco-Oakland-Fremont	4	50.01%	7.53%	624.9	3
Washington-Arlington-Alexandria	5	52.42%	6.16%	628.7	5
Minneapolis-St. Paul-Bloomington	6	50.38%	6.35%	647	8
Los Angeles-Long Beach-Santa Ana	7	47.40%	7.83%	627.2	6
Providence-New Bedford-Fall River	8	49.14%	5.75%	690.1	7
Austin-Round Rock-San Marcos	9	52.31%	7.96%	527.8	15
Miami-Fort Lauderdale-Pompano Beach	10	45.08%	9.39%	576.9	17
Cleveland-Elyria-Mentor	11	51.52%	4.44%	685.7	9
Baltimore-Towson	12	52.15%	4.90%	651.8	16
San Diego-Carlsbad-San Marcos	13	47.83%	7.44%	598.7	10
Chicago-Joliet-Naperville	14	50.24%	5.31%	650.1	13
Denver-Aurora-Broomfield	15	48.29%	7.33%	588.7	19
Columbus	16	50.81%	5.78%	615.5	14
Philadelphia-Camden-Wilmington	17	50.39%	4.82%	666.4	12
New York-Northern New Jersey-Long Island	18	49.38%	5.78%	638.5	21
Sacramento-Arden-Arcade-Roseville	19	48.83%	6.59%	608.3	29
Nashville-Davidson-Murfreesboro-Franklin	20	46.88%	7.34%	583.6	11
Seattle-Tacoma-Bellevue	21	48.74%	5.81%	619.9	28
Milwaukee-Waukesha-West Allis	22	46.79%	5.57%	657.1	18
Kansas City	23	47.42%	6.18%	614.7	23
Houston-Sugar Land-Baytown	24	49.55%	5.79%	579.2	24
Cincinnati-Middletown	25	49.39%	4.41%	645.1	30
Indianapolis-Carmel	26	47.79%	5.77%	606	22
Detroit-Warren-Livonia	27	48.51%	4.46%	654	26
Tampa-St. Petersburg-Clearwater	28	47.06%	6.18%	598.5	33
Dallas-Fort Worth-Arlington	29	48.06%	6.11%	578.2	27
San Jose-Sunnyvale-Santa Clara	30	47.50%	5.92%	593.2	20
Virginia Beach-Norfolk-Newport News	31	50.18%	3.90%	640.1	34
St. Louis	32	46.90%	5.19%	624.4	25
Atlanta-Sandy Springs-Marietta	33	45.51%	6.32%	593.4	32
Riverside-San Bernardino-Ontario	34	47.25%	5.23%	591.4	37
Charlotte-Gastonia-Rock Hill	35	48.04%	5.30%	572.4	35
San Antonio-New Braunfels	36	47.08%	5.56%	575.6	31
Orlando-Kissimmee-Sanford	37	45.44%	6.19%	554.5	39
Phoenix-Mesa-Glendale	38	43.47%	6.24%	575.2	36
Jacksonville	39	45.50%	4.33%	574	38
Las Vegas-Paradise	40	41.27%	4.63%	496.6	40

Source: Kauffman Foundation, 2017

The variation in Columbus entrepreneurship type indicates that identification of successful sectors and type of entrepreneurship could be a foundation to a collective regional strategy focusing on a priority sector entrepreneurship and small business ecosystem. For example, the distribution and growth of non-employer establishments by industry highlight possibilities of further growth and higher wages in the region—professional, scientific, and technical services and education services.

Year-over-Year Change Number of Nonemployer Establishments by Industry					
Industry	2012	2013	2014	2015	2016
Agriculture, forestry, fishing and hunting	11.8%	-1.1%	6.2%	-8.5%	-7.5%
Mining, quarrying, and oil and gas extraction	1.4%	4.6%	7.9%	-18.3%	-21.4%
Utilities	34.3%	-24.4%	-8.8%	-1.6%	-11.5%
Construction	0.6%	1.3%	5.6%	-1.8%	-0.1%
Manufacturing	9.1%	3.6%	-1.0%	7.6%	-7.8%
Wholesale trade	-0.7%	-2.3%	0.5%	5.5%	-5.3%
Retail trade	5.9%	-3.3%	3.3%	1.1%	0.9%
Transportation and warehousing	4.8%	7.4%	23.0%	27.1%	28.1%
Information	2.2%	-6.3%	4.3%	-2.3%	-1.4%
Finance and insurance	3.5%	-3.7%	1.4%	-1.3%	-2.4%
Real estate and rental and leasing	2.3%	1.4%	4.8%	2.8%	2.1%
Professional, scientific, and technical services	0.4%	0.6%	2.9%	1.3%	3.1%
Administrative and support and waste management and remediation services	-1.3%	0.9%	1.3%	-1.0%	-2.9%
Educational services	2.0%	-0.3%	9.7%	5.1%	2.4%
Health care and social assistance	-1.7%	0.6%	-0.4%	-3.1%	-0.7%
Arts, entertainment, and recreation	3.9%	2.8%	3.0%	5.1%	2.0%
Accommodation and food services	4.1%	-0.8%	10.0%	-2.2%	5.9%
Other services (except public administration)	0.8%	1.7%	1.8%	-0.4%	-1.3%
Total	1.4%	0.8%	4.1%	2.2%	2.6%

Source: U.S. Census Bureau, Nonemployer Statistics

Currently, high growth—especially information technology (IT)—dominates the language of entrepreneurship in the Columbus region. The efforts “pick winners” in this arena from the health, retail, finance, and logistics industries; however, recent research indicates that entrepreneurship is not as likely to create as many jobs as in the past. The Kauffman Foundation refers to this as the “new nature of entrepreneurship”, where “technology has made it possible for startups to grow revenue without as much hiring.”⁶⁹ Although new and young companies have been the biggest job creators for decades, and continue to be, technology will likely change that.

The regional entrepreneurship support ecosystem has few players, dominated by established “legacy” firms (Rev1 Ventures, NCT Ventures) with little competition (Lumos Accelerator, FinTech71, Collaboratory). The wider narrative around entrepreneurship and small business funding is that the

⁶⁹ Arnobio Morelix et al., “Zero Barriers: Three Mega Trends Shaping the Future of Entrepreneurship,” 2017.

legacy groups, a.k.a. “sacred cows”, always get the money and the funding is not tied to quality of service and outcome benchmarks. This quiet critique suggests that Columbus and Franklin County need to rethink their strategy and lead through defining benchmarks for partners support and seed the “next gen” of priority sectors.

The lack of diverse support, collaborative efforts, and commitments of anchor institutions, from Ohio State University to Battelle Labs to large private sector employers, create less dynamism and churn in the entrepreneurship ecosystem. The lack of collaboration engenders redundancy and lack of ownership of responsibility that could allow those with a comparative advantage to enhance the system. The competitors may focus on sectors, but they are often embracing the same sectors—except for Collaboratory’s cybersecurity efforts.

Open Innovation and Capital

Franklin County could consider an effort to stimulate greater corporate involvement. A dramatic shift has occurred in how ideas are commercialized, yet many of Columbus firms are still using closed innovation models, where internal research and development (R&D) labs of large companies control future discoveries to address their business needs. Today, it is more common that innovations evolve external of the commercializing firm because of open innovation activities like licensing agreements or a partnership proof of concept. The altered dynamics of innovation create tighter, more productive connections among large firms, the small business, and entrepreneurs to the benefit of the ecosystem.⁷⁰

A culture of collaborative open innovation among private and entrepreneurial actors could address challenges to the traditional business models of retail, finance, insurance, health, and logistics. Many of Columbus’ large private sector entities are first generation—L Brands and Cardinal Health—and many do not have innovation labs. Rev1 Ventures has started to have success in this space, playing the innovation partner, finding entrepreneurs with tools to match the needs of companies, and then serving as the manager of the investment funds that fund the solutions (e.g. State Auto). However, more companies need to have such an ethos of open innovation, embracing a dialogue about the types of business challenges they face and partnering with entrepreneurs to build, test, and activate solutions.

Understanding Diversity in Entrepreneurship and Small Business Needs and Barriers

A supportive, diverse entrepreneurship and small business ecosystem needs to recognize the changing demographics of founders and industry, focusing on ways to ease the startup process with appropriate mentorship and programming that are neither bureaucratic nor academic and are responsive to the changes underway. This includes understanding the barriers and targeting partnerships and funding appropriately:

- 1) Equity impact of access to capital is a struggle for potential entrepreneurs that don’t have access to the first line of capital—friends, family, and credit. Overreliance on this standard in the Columbus ecosystem leads to less diversity among founders from different race and

⁷⁰ Darrene Hackler, “High-Technology and Regions in an Era of Open Innovation,” in *Innovation, Technology and Knowledge*, ed. Charlie Karlsson, Borje Johansson, and Roger Stough, Studies in Global Competition (New York: Routledge, 2011), 240–62.

- income backgrounds and to the likelihood that startups are “high-growth tech” and not the main street businesses where Columbus actually ranks well.
- 2) Capital may not be “the”, or “the only”, issue; many struggle with marketing the product or service and need assistance.
 - 3) Coordination of entrepreneurship and small business offerings is vital to reducing redundancy of services and possibility funding.
 - 4) Low and moderate income business founders lack opportunity and spaces to work together that are inclusive, interdisciplinary environments with an opportunity to collaborate and incubate.

Business Weakness Wrap

The weaknesses of business reflect the lack of priority sectors and suffering from manufacturing losses that were more likely replaced by low wage job growth and local serving sectors like health care. In terms of the entrepreneurial ecosystem, there is a redundancy of support services and lack of collaboration and leadership that seek to improve the ecosystem as a whole. The barriers to entrepreneurship diversity and types of small business support restricts opportunity to the normal high-tech, high-growth, traditional founders.

Opportunity: Business

Rickenbacker Foreign Trade Zone and Value-Added Opportunity

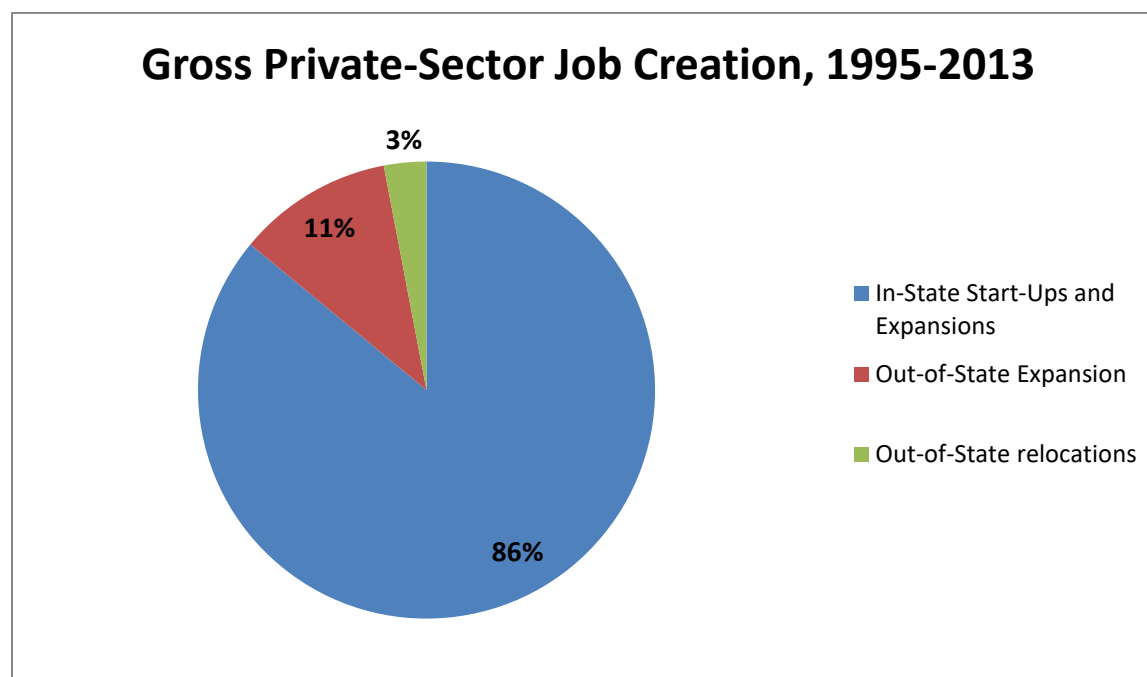
Rickenbacker, discussed more fully below in the Place Capacity section, presents an opportunity to address sector diversification and increase value-added industry and the logistics power of the airport and the FTZ. Currently, the FTZ is generating 40% of the Columbus Regional Airport Authority’s Rickenbacker business revenues. However, FTZ jobs average less than Ohio’s payroll per worker, \$49,400 versus \$55,800.

Three possible and related efforts could ramp up the area. First, a “value-added” logistics support center concept would focus on more balanced recruitment and expansion efforts to create a collocation of warehouses, distribution centers, and support centers. Second, the great number of acres of land on the eastern side of the airfield is ripe for utilization toward high-value good production that could leverage the airfield. Small goods could be flown in, up-manufactured with close-proximity, raw materials at the FTZ, and flown back out for distribution. The niche would be small, lightweight parts like in technology or pharmaceuticals. The latter would require assets like cold storage, R&D facilities, and wet lab development. Finally, as the only Port of Embarkation, the FTZ should look to increase export volume including export livestock, requiring animal holding stalls. Other strategies discussed at the opportunities workshop are appealing, but each requires focused explorative business plan analysis.

Entrepreneurship and Small Business Support and Alignment

Business attraction may seem to have the biggest payoff, but risks and competition limit this strategy’s upside. Over the past two decades, 86% of new U.S. jobs come from in-state start-ups and expansion, while only 11% come from out-of-state expansion and 3% from out-of-state relocations, and Ohio holds

to this pattern. Franklin County and the Columbus region would be better off focusing its efforts on growing its own.⁷¹ Given the partnership with Columbus 2020 for attraction, Franklin County's sweet spot could be around supporting the conditions that can maximize business expansions of the 84.4% of locally-owned businesses that have more influence on job creation than businesses with out-of-region headquarters.⁷²



Source: Center on Budget and Policy Priorities, February 2016

Although new business creation, whether high growth or not, will always result in some failures, the firms that survive after five years are more likely to grow. EDP's small business expansion focus should recognize how any support efforts must be honed to the life-cycle stage of business growth. A fifth⁷³ of Franklin County's businesses are first-stage businesses with fewer than nine employees, and since 2010 these grew from about 6% while second-stage business grew only 1.5%. This is problematic since over the last decade, U.S. businesses with 10 – 99 employees, considered a second stage of business, were packing above their weight. They accounted for over a third of the U.S. economy's jobs and sales even though they only represented 17% of all US businesses.⁷⁴

⁷¹ Michael Mazerov and Michael Leachman, "State Job Creation Strategies Often Off Base" (Washington, D.C.: Center on Budget and Policy Priorities, February 2016), <https://www.cbpp.org/research/state-budget-and-tax/state-job-creation-strategies-often-off-base>.

⁷² Your Economy data makes the distinction between RESIDENT and NONRESIDENT business types because "locally owned" businesses typically have more influence on job creation than businesses with out-of-region headquarters. NONCOMMERCIAL businesses are primarily found in governments, and a majority of business has no sales.

⁷³ Include Self-employed at 0.8% in 2017.

⁷⁴ Christian Gibbons, "Economic Gardening.," *Economic Development Journal* 9, no. 3 (Summer2010 2010): 5–11, <https://doi.org/Article>.

Zeroing in on growing second stage business has merit because these firms have made it through the "startup" phase, employ the most people in Franklin County, are typically privately held, and all tend to maintain their entrepreneurial mind-set. However, smaller companies face many challenges in the market, from finding well-trained employees and financial constraints to a lack of information, financing and ownership skills. Support crafted around where the government provides information to overcome these hurdles can pay off, increasing the churn that could counter the large firm decline since 2010, where both stage three firms (100-499 employees per establishment) and stage four businesses (over 500 employees) decreased around 4% and generated a majority of net jobs loss of 16,660.

Employment Stages and Business Type, Franklin County 2010 – 2017				
Jobs	2010	% of Total	2017	% of Total
All	863,497	100	913,288	100
Self-Employed	5,731	0.7	7,685	0.8
First-Stage (2-9 Employees)	128,882	14.9	189,398	20.7
Second-Stage (10-99 Employees)	266,992	30.9	295,794	32.4
Third-Stage (100-499 Employees)	192,836	22.3	168,929	18.5
Fourth Stage Business (500+ Employees)	269,056	31.2	251,482	27.5
Resident (Locally-owned)	567,266	65.7	647,011	70.8
Nonresident	197,193	22.8	191,424	21.0
Noncommercial	99,038	11.5	74,853	8.2
Source: Your Economy, 2017. ⁷⁵				

Franklin County EDP could partner and lead the effort to coordinate entrepreneurship and small business offerings to reduce redundancy of services and identify gaps. Many support organizations and nonprofits claim the system is hard for small business to navigate, and it lacks a cohesive or collaborative connection of the services. The local food action plan's⁷⁶ portal development could provide a template, as could other open source systems like BIZPAL.CA. This Canadian site provides any person wanting to start a business with an entire checklist for the jurisdiction and type business, from permits to fees. The site covers 11 of 13 provinces in Canada, serving 80% population at a cost of approximately \$500,000. New York City Department of Small Business Services utilized the same open source system to develop its own customized list of requirements for business called "[Step by Step](http://www1.nyc.gov/nycbusiness/wizard),"⁷⁷ as well as an

⁷⁵ Your Economy, "YE Profile Dashboard: Franklin County 2010 - 2017: Explore Economic Activity in Your Community," accessed March 5, 2019, <http://youreconomy.org/profile/details.ye?type=e&key=Stage-Two&state=OH&year1=2010&year2=2017&county=39049&custom=undefined>.

⁷⁶ City of Columbus and Franklin County, OH, "Local Food Action Plan," November 2016.

⁷⁷ New York City Department of Small Business Services, "Step by Step - NYC Business," accessed April 3, 2019, <https://www1.nyc.gov/nycbusiness/wizard>.

[“Incentives Estimator”](#)⁷⁸ that identifies the incentives for which a business would qualify. Franklin County could model their efforts to consolidate and centralize all practices in its municipalities, and even think about partnering with the City’s Accelerate Columbus efforts. The collected data could create datamining opportunities to uncover trends of what is happening and where. The tools could streamline municipal efforts and support the growth of a variety of business, even second- and middle-stage companies with expansion in mind.

EDP should also consider leveraging other County entrepreneurship and small business priorities and efforts such as the Economic Inclusion Advisory Council’s and Forward Cities’ partnership, the outcomes of the Poverty Study, and the Commissioners’ goals on reentry. EDP’s actions could build stronger cross-departmental ties on similar “business development and capacity building” efforts. EDP’s facilitation of a standing cross-departmental committee would provide a venue for sharing what’s going on this space, identifying issues to address, appropriate leads, and coordinating budget requests and funding disbursements to amplify the efforts. Altering funding around shared priorities—sector, race, gender, and geography—could sponsor a necessary reset in the system.

Any reset should ensure that selection and evaluation metrics reflect priorities and measures the quality of impacts and outcomes in the priority policy or locations. A possible partnering opportunity to standardize and align metrics would be with the City’s Accelerate Columbus small business effort that is formalizing the network of entrepreneurial support organizations (ESOs). The City’s multi-pronged effort maps each ESO’s services to the life-cycle of a small business from formation to growth stages. In addition, the City will certify the ESO and evaluate their services tied to City funding based on the quality and value of results. Given that most ESOs aggregate funding from local governments, ensuring that the City and Franklin County are aligned in terms of expectations and outcomes would address redundancy, connect the services in a meaningful way for business, leverage governmental efforts, and increase likelihood that the entrepreneurship and small business ecosystem is receiving the support needed.

Business Opportunities Wrap

Franklin County’s opportunity in business capacity is in the local ecosystem and improving the Rickenbacker asset and connections for entrepreneurs and small- and mid-sized business. Enhancing Rickenbacker to be a stronger local asset requires a collective effort to evolve the TDL cluster to next-generation, value-added economic potential. For entrepreneurship and small business, understanding the entrepreneurs, the sector, the type of entrepreneurship, and needs to develop them into next-generation economic contributors and success is vital. An initial start would be a portal that Franklin County could consolidate and centralize all practices in its municipalities and partner with the City to provide small business owners and aspiring owners with the regulatory and incentive information. Further partnering with the City on its ESO effort would address redundancy of services, connect the services in a meaningful way for business, and leverage efforts to meet entrepreneurship and small business ecosystem needs.

⁷⁸ New York City Department of Small Business Services, “Incentives Estimator - NYC Business,” accessed April 3, 2019, <https://www1.nyc.gov/nycbusiness/ie>.

Threat: Business

Impacts from Lack of Industrial Diversification

The importance of a diversified economy cannot be overstated. The diversification of sectors in Columbus is lauded by many stakeholders as they suggest that it helps dampen economic shocks. The Great Recession, however, was felt quite heavily in many consequential industries, and the decline in establishments in the goods producing sectors of manufacturing and mining is notable, with only construction having growth.

A second essential ingredient of diversification is distribution of employment gains by size of business. Large firms employ more than 55% of all workers within the Columbus region, and “since 2004, mature firms (those in business for six years or longer) have accounted for all net employment gains in the region.”⁷⁹ However, recent analysis by the Columbus City Auditor indicated that the growth rate of income-tax withholdings collected from employees slowed at four of the 10 largest employers in the city.⁸⁰ The level of sector diversification lacks dynamism and is in need of a focused priority reset.

Disruption in Retail, Logistics, Health Care, Insurance, and Construction

Economic disruption from globalization, foreign trade, technological change, and demographic shifts creates challenges on both the demand side and in the supply chain. On the positive side, construction is a growing industry in the region, and housing dynamics have started to positively impact the demand for labor, with the average wage of nonsupervisory workers in residential construction increasing over 6 percent over the past year—almost the steepest annual increase since data tracking started 30 years ago. This is translating to increased pay and even employers compensating commute costs for workers for less-skilled construction trades.⁸¹

The negative disruptions are many, from foreign trade impacts on construction and other manufacturing industries to the ripple of it and technology the heavily reliant sectors. E-commerce has dual implications on the local fiscal base and local jobs. Franklin County has incentive to keeping population and growing it due to its reliance on sales tax revenue,⁸² apportioned to where the purchase is made.

In regard to jobs, the strong presence of retail distribution is not necessarily fiscally beneficial to Franklin County. Traditional retailers are experiencing significant difficulty, and the online retail base is building for an online purchasing and shipping future. However, the jobs type and pay in these supply chains may suffer as many business processes of retail, distribution, and logistics face automation.⁸³ Warehouse growth is not likely to be beneficial as documented in research examining Amazon fulfillment centers.

⁷⁹ Avalanche Consulting, “Regional Economic Development Assessment: Report 2: Competitive Forces Analysis,” 36.

⁸⁰ Rouan, “Columbus’ Income Tax Revenue Not Keeping up with Population Growth.”

⁸¹ Eduardo Porter, “Short of Workers, U.S. Builders and Farmers Crave More Immigrants,” *The New York Times*, April 3, 2019, sec. Business, <https://www.nytimes.com/2019/04/03/business/economy/immigration-labor-economy.html>.

⁸² Sales taxes decreased by \$7.3 million over sales tax revenue of calendar year 2016 as a result of loss of sales tax revenue on certain Medicare costs.

⁸³ Avalanche Consulting, “Regional Economic Development Assessment: Report 2: Competitive Forces Analysis,” 7.

Although recipient counties experienced increases in the number of warehouse jobs in a county, overall county-level employment did not increase and likely just displaced incumbent jobs.⁸⁴ Continued growth in TDL without intentional focus on moving up the value chain will continue business as usual, low paying jobs, and minimal growth.

Healthcare industry's evolution with digital health and advanced services will also have employment implications for segments of the in-person care workforce. Care workers will likely suffer from highly-sophisticated automation like artificial intelligence to quickly and accurately diagnose diseases, virtual healthcare and virtual reality for treatment and training, nanomedicine, 3D printing, and robot assisted surgery.⁸⁵

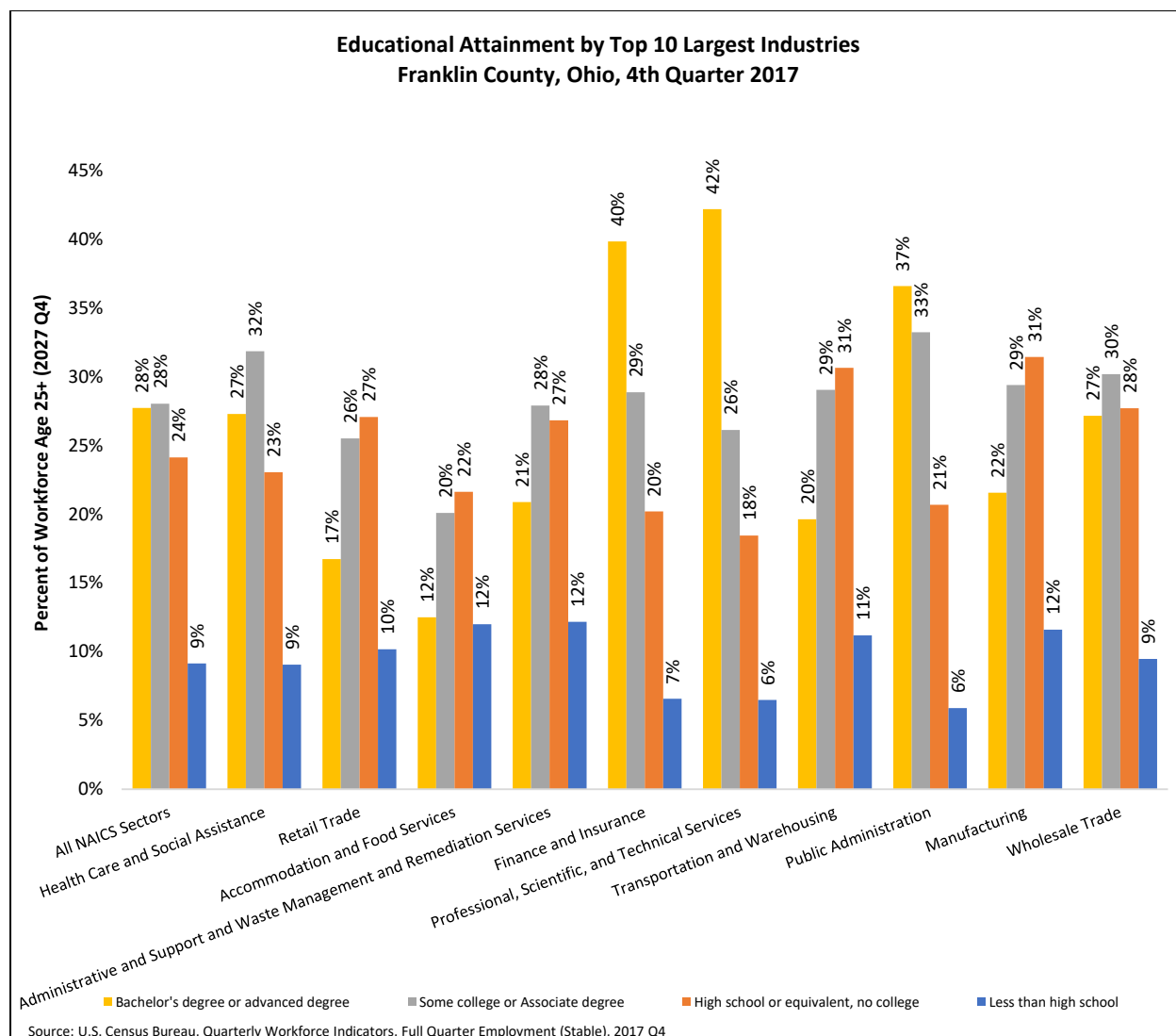
Insurance is also experiencing changes that require a very different type of employee skill. Although brokers and advisors are still needed, the technological change around usage of block chain, cloud computing, and other InsurTech development create greater need for technology sector jobs like machine learning engineers intersects with actuarial math expertise. However, the insurance industry is facing a large gap in attracting millennial talent.⁸⁶

The combination of the threat of automation with the need for advanced skills requires action focused on upskilling talent in these industries. The educational attainment across Franklin County's top 10 industries indicates the need since the majority of the workforce in all industries has an associate degree or some college or below. The demand to increase value-add and skill will hit some of the same industries and jobs under threat.

⁸⁴ Janelle Jones and Ben Zipperer, "Unfulfilled Promises: Amazon Fulfillment Centers Do Not Generate Broad-Based Employment Growth" (Washington, D.C.: Economic Policy Institute, February 1, 2018), <https://assets.documentcloud.org/documents/4402413/EPI-Amazon-Jobs.pdf>.

⁸⁵ Iman Ghosh, "5 Ways Technology Is Transforming the Healthcare Industry," Visual Capitalist, February 27, 2019, <https://www.visualcapitalist.com/5-ways-technology-healthcare-industry/>.

⁸⁶ Deloitte Center for Financial Services, "2019 Insurance Industry Outlook," Deloitte United States, accessed April 3, 2019, <https://www2.deloitte.com/us/en/pages/financial-services/articles/insurance-industry-outlook.html>.



When an economy starts to sputter internally or as a result of national, global, technological forces, it may start to lose out on opportunities for which it was once winning, engendering further sputtering in a downward trajectory where it starts to lose out regularly. The forecasted changes hold dire implications for business as usual.

Lack of Inclusive Environment

Just as inclusive environments create higher upward mobility and faster rates of per capita income growth, the more diversity in founders and entrepreneurs—whether startups, growth, or main street—the better the region's economic success. Yet the pipeline of diverse founders is small, particularly for Blacks and Black women. For example, Rev1 Ventures funding for both, although above the national average, is much less than Columbus' population of both segments.

Business Threats Wrap

The Columbus region's economy needs greater dynamism and investment in a collaborative framework to foster local firms, whether entrepreneurs or small, middle or large businesses to enable more equitable growth potential. The effort to ensure greater racial and ethnic distribution across growing and good-paying industries focuses on how awareness of diversity can benefit the current economic base and traditional business models.

Race/Ethnicity by Top 10 Industries Franklin County, OH, 4th Quarter 2017					
Industry	White Alone	Black or African American Alone	Asian Alone	Two or More Races	Hispanic or Latino*
All NAICS Sectors	82%	11%	2%	1%	3%
Health Care and Social Assistance	77%	16%	2%	1%	3%
Retail Trade	83%	10%	2%	2%	3%
Accommodation and Food Services	75%	14%	3%	2%	6%
Administrative and Support and Waste Management	71%	20%	2%	2%	5%
Finance and Insurance	83%	11%	3%	1%	2%
Professional, Scientific, and Technical Services	85%	5%	6%	1%	2%
Transportation and Warehousing	80%	14%	1%	1%	3%
Public Administration	83%	13%	1%	1%	2%
Manufacturing	85%	8%	2%	1%	4%
Wholesale Trade	88%	7%	2%	1%	3%
Source: U.S. Census Bureau, Quarterly Workforce Indicators, Full Quarter Employment (Stable), 2017 Q4					
*Hispanic or Latino is an ethnicity, and this category may fit into multiple racial categories					

Business Capacity Conclusion

Priority sector identification paired with investment in creating paths up the value chain to higher paying, middle income jobs would take a concerted and collaborative effort of regional leaders from education and workforce to business development. The entrepreneurship and small business ecosystem has levers to pull; however, no effort in the region will capitalize on the demographic changes more than an intentional and inclusive effort to integrate those being left behind and participating on the margins.



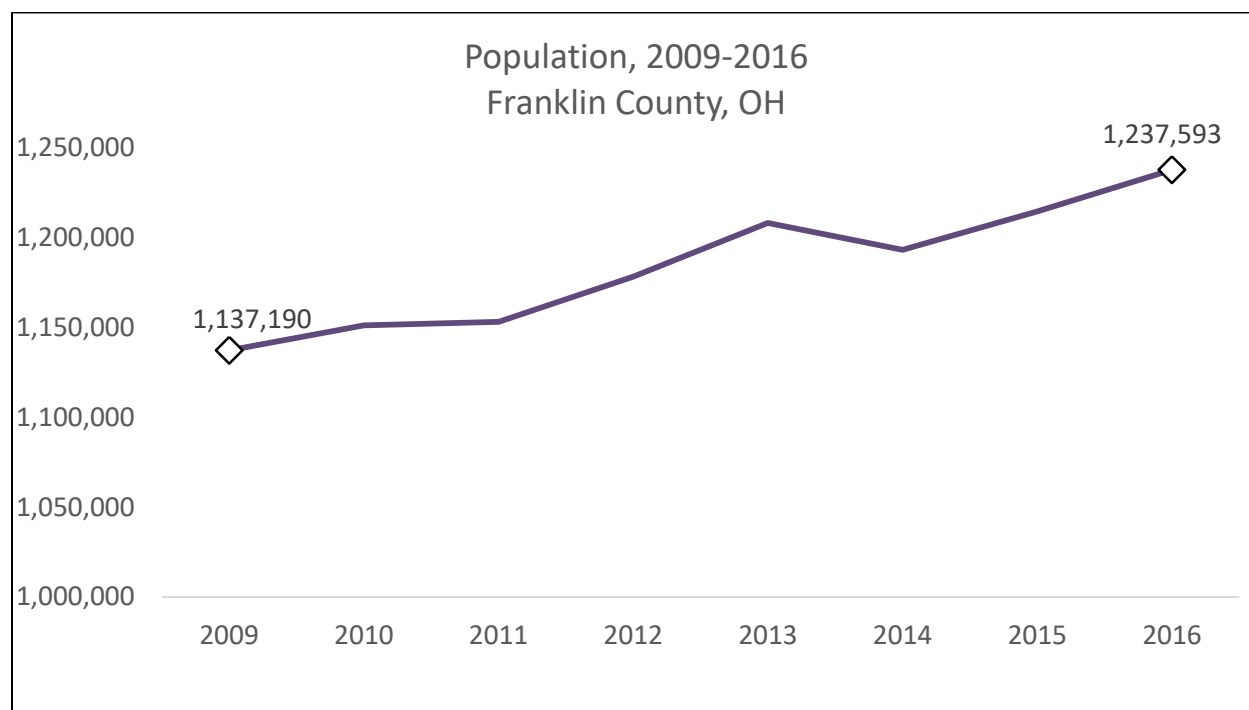
Place Capacity SWOT

Place capacity focuses on the physical and environmental assets or challenges that influence the potential for economic and community development. It includes infrastructure, buildings and public spaces, but it is also essential to understand the physical and emotional relationship that residents have with their home, neighborhood, and town/city. Most people can identify assets that create a sense of pride in the neighborhood and describe what is missing. Place-building seeks to create desirable spaces where people are comfortable and can integrate into regional opportunities.

Strength: Place

Reputation

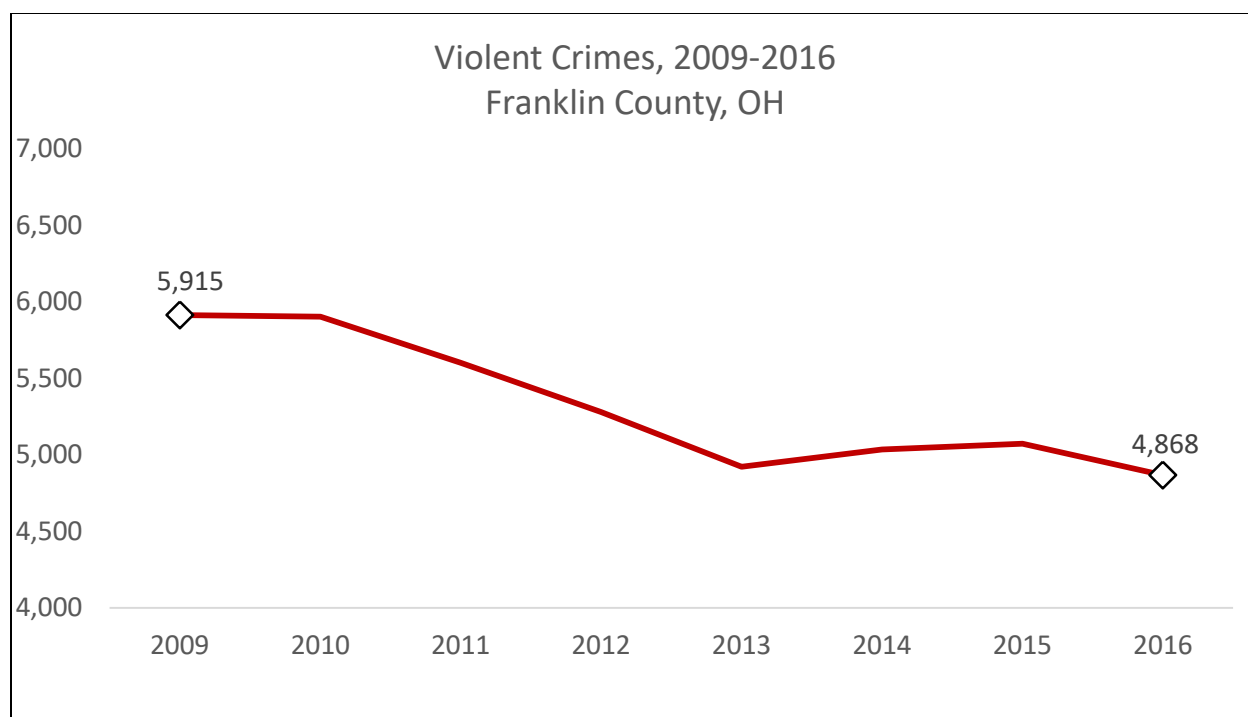
Columbus is the 14th largest city in the country, the only large northern city to grow by more than 10% from 2010 to 2017,⁸⁷ and the [fourth fastest](#) growing city in the U.S.⁸⁸ Still it remains a relatively safe city. Between 2009 and 2016 Franklin County's population increased by approximately 9%, and the number of violent crimes declined by an estimated 18%.



Source: Ohio Office of Criminal Justice Services

⁸⁷ Adam Millsap, "Columbus, Ohio Is Booming But Will It Last?," *Forbes*, accessed February 26, 2019, <https://www.forbes.com/sites/adammillsap/2018/08/06/columbus-ohio-is-booming-but-will-it-last/>.

⁸⁸ Evans, "Census: Columbus Is the 4th Fastest-Growing Big City in the US."



Source: Ohio Office of Criminal Justice Services

Rickenbacker's Plentiful Land and Central Location

Particular parts of Franklin County in the south-southeast around Rickenbacker International Airport provide economic strength and opportunity. The airport has both a foreign trade zone (FTZ, ranked #8 out of 195 FTZs in the U.S. for 2016) and international ecommerce certification for global distribution (Express Consignment Facility, ECCF). The area also hosts the Rickenbacker Global Logistics Park (RGLP) and Norfolk Southern Rickenbacker Intermodal Terminal.⁸⁹ The intermodal terminal creates a powerful transportation, distribution, and logistics (TDL) hub. With the extensive intermodal network of both Norfolk Southern and CSX, the region is a one-day truck drive to nearly half of the U.S. and to one-third of the Canadian populations. Retail companies, such as L Brands, the Columbus-based parent company of Victoria's Secret, La Senza and Bath & Body Works, are the biggest air cargo player at Rickenbacker, followed by significant shipping from Ascena Retail Group (Ann Taylor, Lane Bryant) and GE Aviation.⁹⁰

The 2017 Columbus Regional Airport Authority (CRAA) economic impact study reports that off-airport CRAA-related activity in the Rickenbacker area directly creates nearly 9,000 jobs and \$1.3 billion in

⁸⁹ Economic Development Research Group, "Economic Impacts of the Columbus Regional Airport Authority in 2017," January 2019, 54, <https://newshub.columbusairports.com/storage/production/20190122131313-final-report-0112219.pdf>.

⁹⁰ Marla Matzer Rose, "Officials Planning for Continued Strong Growth in Rickenbacker Area," The Columbus Dispatch, accessed February 27, 2019, <https://www.dispatch.com/business/20180314/officials-planning-for-continued-strong-growth-in-rickenbacker-area>.

business revenue. The activity succeeds in generating about a half a billion dollars of income (payroll) for workers in Ohio and adds \$744 million to the Gross State Product.⁹¹

Both the CRAA and the Mid-Ohio Regional Planning Commission (MORPC) conducted studies in 2018.⁹²

⁹³ The studies provide needed data and analysis of:

- Workforce mobility & safety
- Freight routing and access
- Business attraction and retention
- Technology integration
- Quality of life

The combination of the region's reputation and central logistic assets indicate that Rickenbacker provides a prime opportunity for aggressive policy innovation with a comprehensive economic and community development approach. Working to activate other parcels of land in the area for higher value-add industry that is complementary to the TDL operations as well as thoughtful tackling of the workforce mobility, transportation, and housing issues with an equitable framework would allow Rickenbacker to realize its potential.

Weakness: Place

Inequitable Growth

Franklin County's growth over the past three decades has been inequitably distributed from the perspectives of geography and household income.⁹⁴ The Franklin County household income opportunity atlas below is saturated in green, reflecting that incomes of high-income households had much higher outcomes (better growth) than low-income households over the examined cohort of children's lives.⁹⁵ Also, the darker the shade of green indicates a greater difference in outcomes between the low and high income groups. For Franklin County, the results are somewhat positive since a child who grew up in a high-income household on average has a much higher income than their parents. However, the issues of inequity are apparent since the map is very saturated with darker green, and this is particularly true in Easton and Eastmoor where high-income households respectively earn \$31,000 and \$32,000 more than low-income households. The lighter shades of green are areas where the differences in high- and low-income households over the period were not as great. For example, Colonial Hills' children in high-income households three decades ago only have \$4,200 more than low income households. Inequitable

⁹¹ Economic Development Research Group, "Economic Impacts of the Columbus Regional Airport Authority in 2017," 56.

⁹² Economic Development Research Group, "Economic Impacts of the Columbus Regional Airport Authority in 2017."

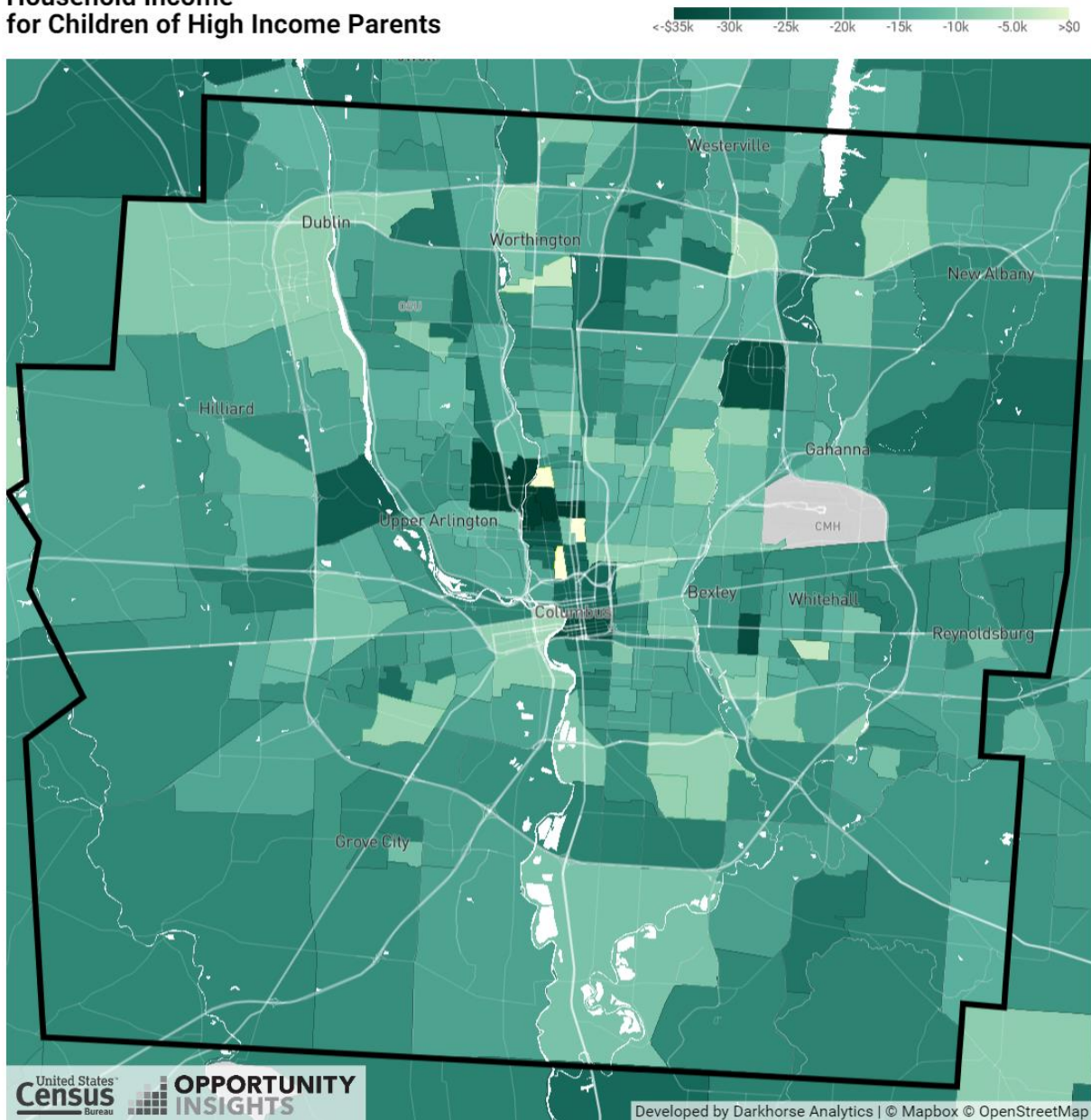
⁹³ Mid-Ohio Regional Planning Commission, "Rickenbacker Comprehensive Study Economic Development Working Group Meeting Materials" (MORPC, February 2018).

⁹⁴ "The Opportunity Atlas," accessed March 27, 2019, <https://opportunityatlas.org/>.

⁹⁵ The map of Franklin County captures a snapshot of how children, now in their mid-30s and who grew up in the area, would be fairing in 2014-2015. The cohort examination compares the parents' average household incomes between low (purple) and high (green) income households.

growth in income suggests the disparity of opportunity by place and highlight areas of uneven opportunity for future generations.

Household Income for Children of High Income Parents



Source: Center on Budget and Policy Priorities, February 2016

Development of Transportation, Transit, and Utilities Network

Although an asset area, the Rickenbacker transportation network creates negative externalities for the surrounding communities from the loud truck and commercial cargo traffic. In addition, the lack of affordable workforce housing in the area makes it a challenge to workers' daily commutes. COTA added new service to reach Rickenbacker, and the recent TSR aligned routes to the Southside area to better

connect that underserved community with job opportunities in Rickenbacker (via Alum Creek). A partnership with the Village of Obetz resulted in the COTA Groveport Rickenbacker Employee Access Transit (GREAT) shuttle, with three continuous loops during the early morning and afternoon to connect COTA commuters to Rickenbacker employers. The MORPC study includes a survey of riders indicating several challenges. First, 94% of commuters don't just rely on GREAT; rather, they start on another COTA bus because 56% of riders have no access to working vehicles in their household and 25% have only one. To add to commuting time, 27% of riders reported having to walk for longer than five minutes to reach their destination. Most of these routes are unsafe from vehicular traffic because of no sidewalks. Finally, many riders desire expansion of GREAT in order to reach additional employment centers and provide more weekend service.

Development is challenging for Franklin County due to the water and sewer utility constraints. The lack of control of this utility and associated infrastructure creates a situation where Franklin County carries the load of pre-development permitting and inspection regardless of water and sewer needs, and the City of Columbus's authority over the utility results in annexation of the property and with it the tax revenues. Currently, Franklin County and the City are conducting a water fragmentation cost study, and Franklin County would benefit from greater flexibility and capacity to play a role in shaping development and/or recovering costs and loss of revenues.

In addition, Franklin County and the region need better data on the jobs nodes and prospective and proposed development to understand the utilities, transportation, and transit implications. The current MORPC Development Points⁹⁶ data only tracks development permits via local news sources and community visits, and its Development Areas offer the same method to document potential development areas.⁹⁷ Efforts to establish greater knowledge and control of development are vital to future planning.

Housing Dynamics

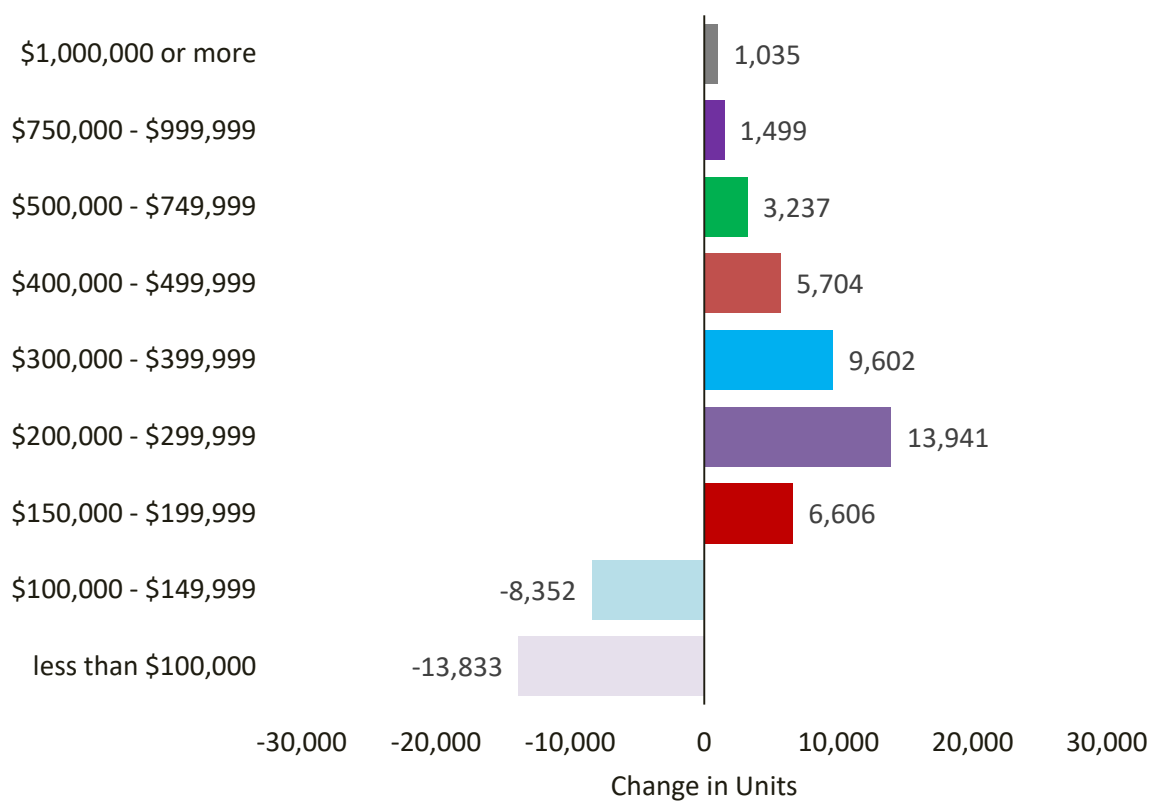
According to Zillow, home values in Columbus have increased sharply since 2013, rising by 9.2% over the past year, with an additional 7% increase in 2019 expected.⁹⁸ Growing regions often have hot housing markets, and the Columbus region is no different. Home values have been trending up in Franklin County with the largest shift occurring in owner-occupied units between \$200,000 and \$400,000, and the only price range to see a decline was owner-occupied units below \$150,000.

⁹⁶ http://public-morpc.opendata.arcgis.com/datasets/230005bf8107462289bf4776e3dae081_0

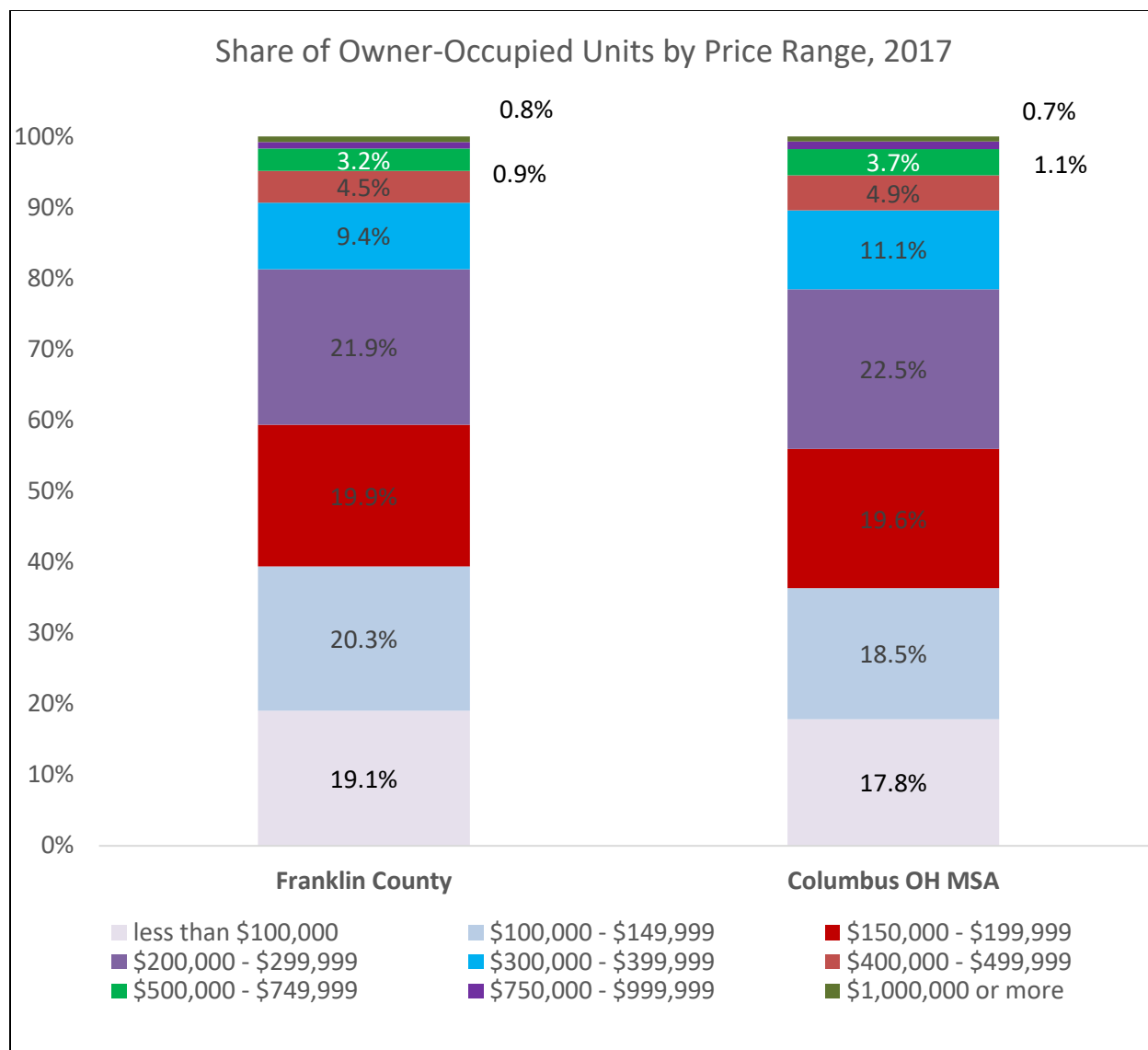
⁹⁷ http://public-morpc.opendata.arcgis.com/datasets/dc27cec4e8974017b053e26ab8bee3bf_1

⁹⁸ Millsap, "Columbus, Ohio Is Booming But Will It Last?"

Change in Owner-Occupied Units by Price Range, 2012 to 2017
Franklin County, OH



Source: U.S. Census Bureau, 1-Year American Community Survey Table B25075



Source: U.S. Census Bureau, 1-Year American Community Survey Table B25075

The forecasted population growth will require additional stock, variation of housing type, and equitable geographical distribution to help alleviate the commute burden and transportation issues.

Housing Type

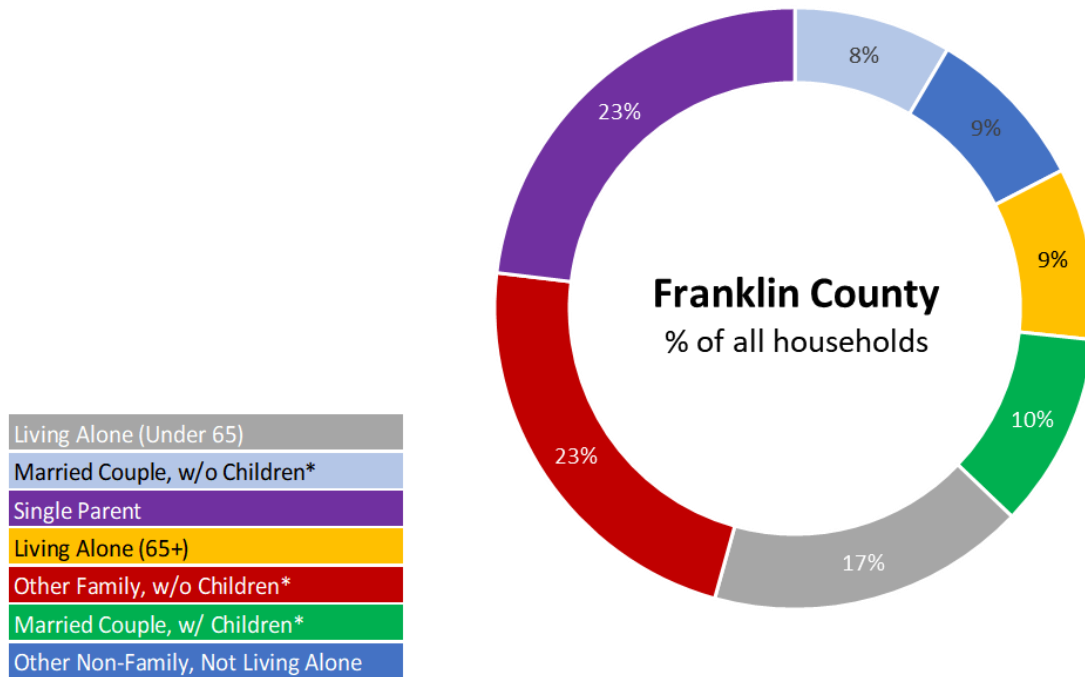
MORPC's Insight 2050 study forecasts the region will need 300,000 new housing units to accommodate population growth.⁹⁹ The housing supply will need to meet evolving needs since over 80% of household growth in the next 40 years will be a one or two person household with no children.¹⁰⁰ The data reflect

⁹⁹ Mid-Ohio Regional Planning Commission, "Insight 2050: Scenario Results Report" (2015), accessed February 27, 2019, https://getinsight2050.org/wp-content/uploads/2015/03/2015_02_26-insight2050-Report.pdf.

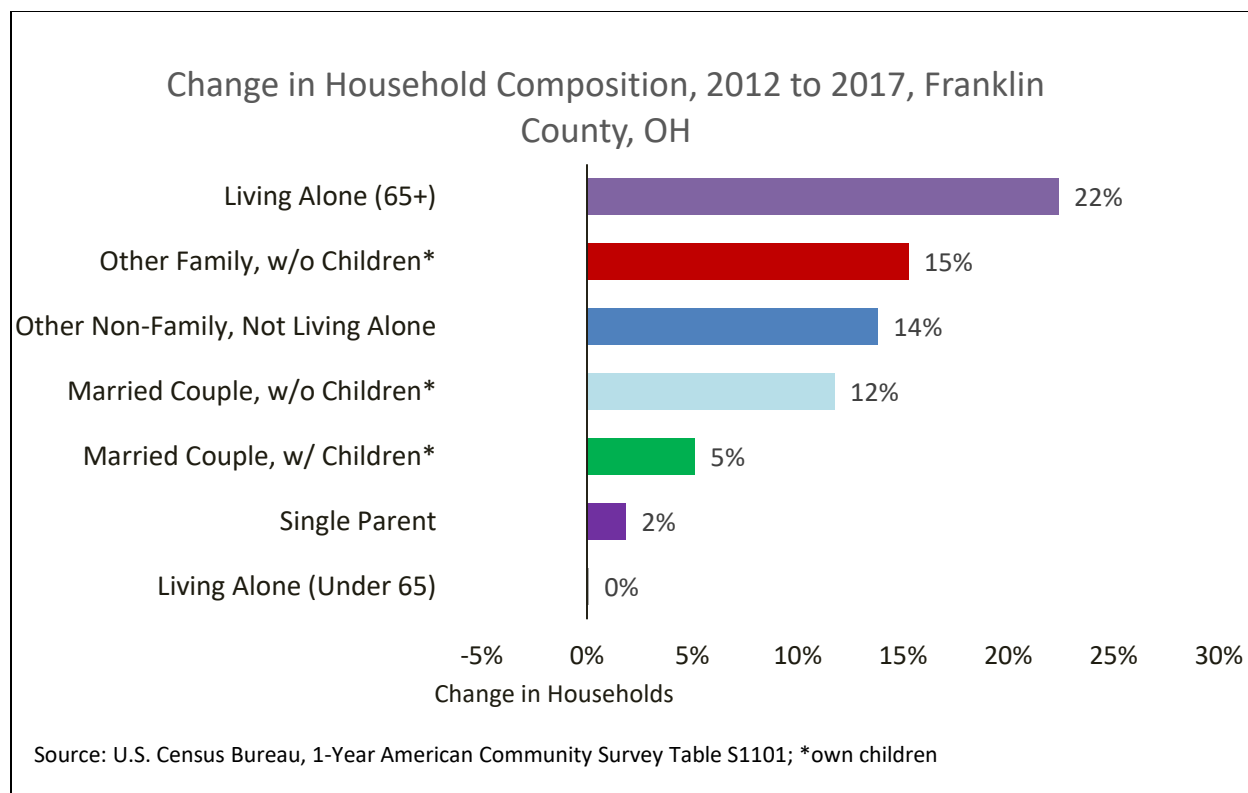
¹⁰⁰ Arthur C Nelson, "Metropolitan Area Trends, Preferences, and Opportunities: 2010 to 2030 and to 2040," n.d., 3.

these trends, as single, seniors, or households with few unrelated adults cope with the cost of housing. In 2017 nearly half (46%) of all Franklin County households were either single parents or non-married family living together without children. There has been a 22% increase in the number of seniors age 65 and older living alone over the past five years, the fastest growing household type in the County. Other non-married family living without children grew 15%, which likely reflects an increase in adults caring for their aging parents. Unrelated adults living together is up 14% in five years, which could be a result of increasing rents in the County, as more residents could be living with roommates to lower housing costs.

Household Composition, 2017

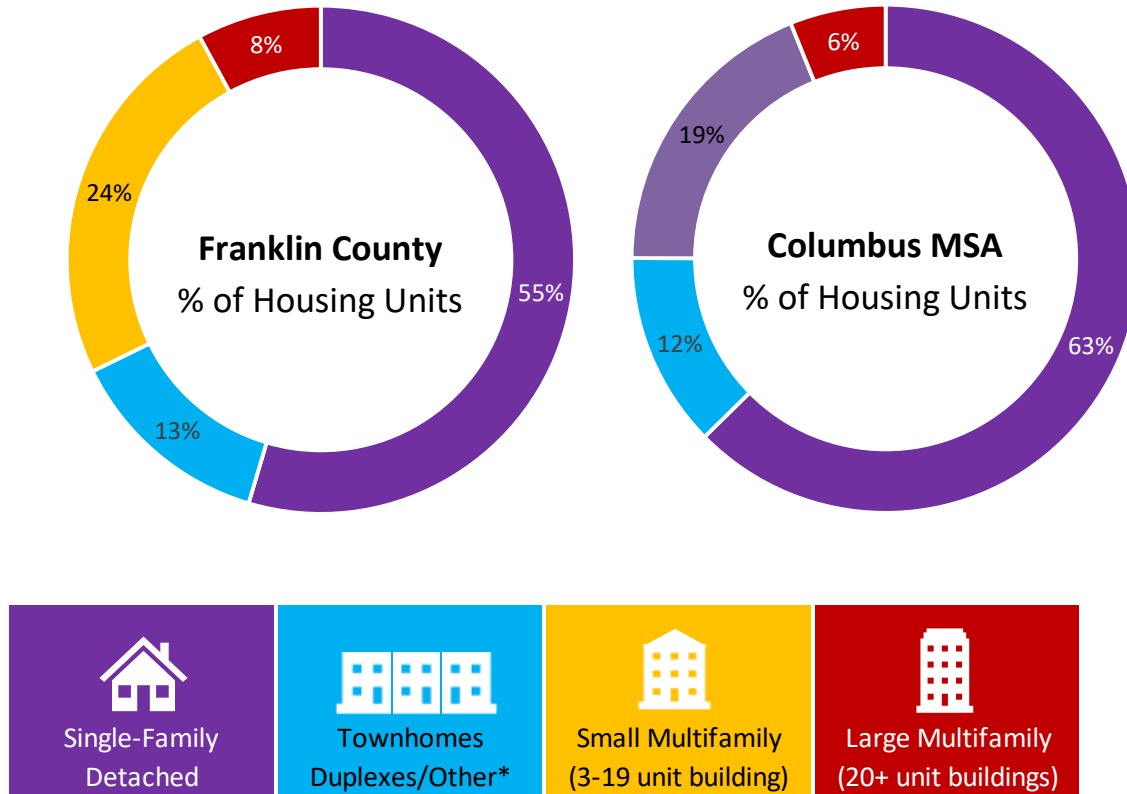


Source: U.S. Census Bureau, 1-Year American Community Survey Table S1101; *own children



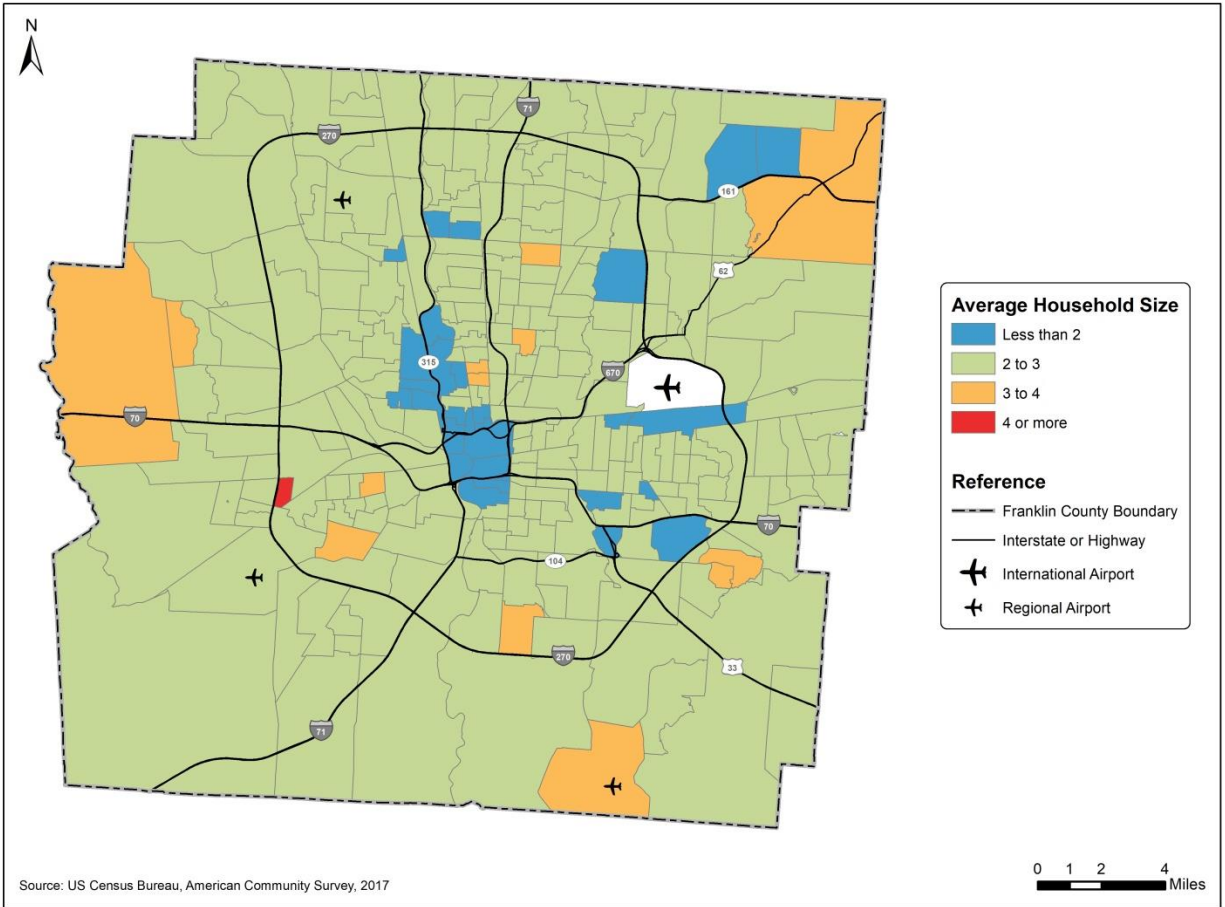
Single-family detached homes are the predominant housing type in Franklin County and had the sharpest growth of any housing type—nearly 15,000 more single-family detached homes in the County in 2017 than in 2012, a 5% increase. Multi-family buildings with 20 or more units had the highest percentage increase, rising 19%. While smaller multifamily buildings (3 to 19 units) account for nearly a quarter of the County's housing stock, the number of units remained essentially flat over the past five years. This could reflect national building trends for larger apartment buildings instead of smaller garden apartment buildings. The map of average household size indicates a more central location of two-three occupants, and the percent owner occupied being higher further from the central core.

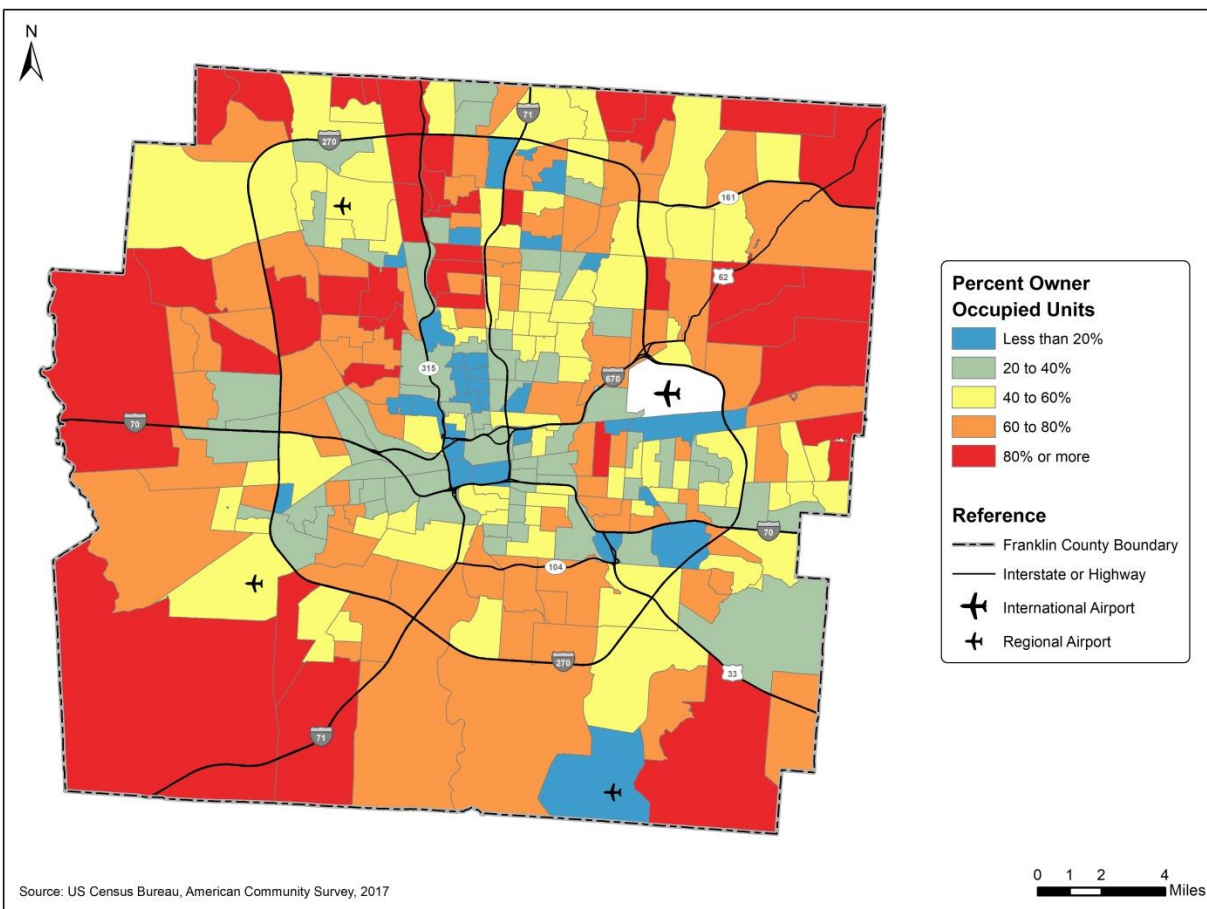
Housing Types, 2017



Source: U.S. Census Bureau, 1-Year American Community Survey Table B25024

*Other includes: RV, mobile home, boat, etc.





Housing Cost

Beyond the type of housing needed, there is recognition that price is critical. According to the Affordable Housing Alliance of Central Ohio (AHACO), there is an estimated shortage of 54,000 affordable housing units in Franklin County.¹⁰¹ Housing cost burden on renters has increased, and rent levels are rising in Franklin County and the Columbus region more broadly. Although an estimated one out of every five occupied rental units in the County had a gross rent between \$500 and \$749 in 2017, this price range had the largest reduction in units over the past five years, declining by over 21,000 units county-wide. Yet, during this same time period, there were an additional 26,400 units renting for \$1000 to \$1249 compared to five years prior, accounting for nearly a quarter of the County's rental housing stock.

¹⁰¹ Affordable Housing Alliance Central Ohio, "The Columbus and Franklin County Affordable Housing Challenge: Needs, Resources and Funding Models" (Columbus: Affordable Housing Alliance Central Ohio (AHACO), February 2017).

Housing Costs as a Percent of Household Income, 2012 and 2017				
Share of Renter Households				
	Franklin County, OH		Columbus, OH MSA	
Rent as a Percentage of Household Income	2017	2012	2017	2012
<30%	54.3%	52.3%	55.9%	52.2%
30-49% (cost burdened)	24.5%	23.2%	23.4%	23.6%
50%+ (severely cost burdened)	21.2%	24.5%	20.7%	24.2%
Total Renter Households	100.0%	100.0%	100.0%	100.0%
Source: U.S. Census Bureau, 1-Year American Community Survey Table B25070				
Share of Owner Households				
	Franklin County, OH		Columbus, OH MSA	
Owner Households	2017	2012	2017	2012
<30%	81.8%	76.3%	82.7%	76.8%
30-49% (cost burdened)	11.2%	15.7%	10.9%	15.3%
50%+ (severely cost burdened)	7.0%	8.0%	6.4%	7.8%
Total Owner Households	100.0%	100.0%	100.0%	100.0%
Source: U.S. Census Bureau, 1-Year American Community Survey Table B25091				

Housing Production

Housing construction is not keeping up with these growing and changing housing needs. A recent Building Industry Association study estimated demand to be 14,000 units a year—and more than half of the units would need to be rental housing.¹⁰² The current rate is only 8,000 a year.¹⁰³ Columbus' building permit activity between 2010 and 2017 lags other benchmarked regions (Austin, Charlotte, and Nashville). In Franklin County permits increased after 2008 until 2013, before declining and remain far from the peak in 1999. More specifically, there has been a decline in two-unit permits since 2013, and in three-four unit permits both in 2015 and 2017.

¹⁰² Jonathan Melchi, "Analysis of Housing Need for the Columbus Metropolitan Statistical Area," 2018, 114.

¹⁰³ Building Industry Association of Central Ohio, "Analysis of Housing Need for the Columbus Metropolitan Statistical Area: One Pager," accessed December 17, 2018, http://www.biahomebuilders.com/aws/BIA/asset_manager/get_file/277417?ver=60.

Building Permits, 2012-2017, Franklin County OH							
Number of Permits							
Units		2012	2013	2014	2015	2016	2017
	1-unit	1372	1497	1672	1508	1604	1719
	2-units	74	82	78	48	42	16
	3-4 units	131	176	183	163	254	104
	5+ units	3287	4332	3125	3654	3870	4015
Total	Units	4,864	6,087	5,058	5,373	5,770	5,854
Year over Year Percent Change							
Units		2012	2013	2014	2015	2016	2017
	1-unit		9.1%	11.7%	-9.8%	6.4%	7.2%
	2-units		10.8%	-4.9%	-38.5%	-12.5%	-61.9%
	3-4 units		34.4%	4.0%	-10.9%	55.8%	-59.1%
	5+ units		31.8%	-27.9%	16.9%	5.9%	3.7%
Total	Units		25.1%	-16.9%	6.2%	7.4%	1.5%
Source: U.S. Census Bureau, Building Permits Survey							

The BIA study suggests that the lagging activity is due to unfavorable density requirements, workforce and labor shortages, regulatory costs, and inflation. However, research provides more nuance when comparing construction labor costs to construction material costs. Over the 2008 – 2017 period across 30 cities, the Columbus region had 4th lowest median home value over the period, and its construction labor costs appreciated just a bit faster than material costs—relatively low in comparison to the other cities. It also had the lowest percent change in the share of building permits corresponding to new construction over 2008 – 2017 period. However, the area is an anomaly because even though construction in Columbus shifted toward renovation, which tends to be more labor-intensive and increase the labor cost, Columbus didn't see labor costs greatly outpacing materials.¹⁰⁴ BIA's claim of labor costs being an issue that contributes to suppressed housing supply needs further investigation as does the lack of permitting, shift to renovation, and lower cost ratios.

Place Weaknesses Wrap

The long shadow of inequitable growth and opportunity increases the need for efforts that can establish greater control over Franklin County development planning. A comprehensive approach requires transportation, transit, and utilities to be part of the housing decision making process in order to have a marked impact on the future of business, jobs, transportation, and infrastructure. More explicitly, the approach must recognize the inequities of the past born by the working poor, low income, and

¹⁰⁴ Issi Romem, "What's Up With Construction Costs?," accessed January 4, 2019, <https://www.buildzoom.com/blog/whats-up-with-construction-costs>.

communities of color in order to change the course on the intersection of housing affordability and mobility.

Opportunity: Place

Opportunity Zones and Corridor readiness

Opportunity zones (OZs) are prime examples of how Franklin County's identification and prioritization of an area for growth could help move the needle on collaboration with transportation, transit, workforce, housing, city, other municipal partners. The requirement that Franklin County could only propose a limited selection of zip code boundaries for consideration and the fact that most zip codes do not traverse major corridors, leaves Franklin County with zones that are only on one side of corridors that are greatly in need. EDP's collaborative OZ identification effort with the City of Columbus is laudable and where OZs are adjacent to the City's OZs, Franklin County should look to collaborate, help close the gap, and increase the potential of the zones.

EDP should try to reduce the transactional nature of potential deals and layout clear objectives and policies that outline priorities and possibilities. Knowledge from the MORPC Insight 2050 Corridors Concept study can inform land use, housing, and transportation needs. The study offers analysis and a toolkit to help Franklin County think about market-sensitive strategies.¹⁰⁵ Concentration of growth incentives, land use and zoning decisions, and transportation investments could allow the County to fully leverage the potential and further the effort near OZs.

Several opportunities also exist from internal Franklin County actions. The Poverty Study strategy desires a task force to review and recommend zoning changes in targeted neighborhoods to improve ease of use of land for employers. In focusing in on OZs, EDP could be a partner and execute on readying the area. The Economic Inclusion Advisory Council and Forward Cities effort is likely to recommend to the Commissioners collaborating on a pilot project in an OZ to further minority contracting efforts.

Recent federal moves indicate that the layering of incentives and tax credits may afford localities more possibilities. The Federal Housing Administration's low-income housing tax credit financing pilot program will now include "new construction" and "substantial rehabilitation" of multifamily projects. In addition, "the provision could speed up the application process for developers looking to use the low-income tax credit to build new ground-up apartment projects, or for those seeking to drastically redevelop old buildings in Opportunity Zones."¹⁰⁶

The coordination of efforts for the OZs could transfer to other business corridor development. Selection of corridors that are ripe for growth—Parsons Avenue, North Linden, and 5th Avenue—could be a proving ground for future OZ development. In addition, the neighborhoods identified under the Celebrate One infant mortality initiative are also corridors that would benefit from the leveraging of the City's and other partners' focus. Intentional County-City coordination on economic development

¹⁰⁵ Mid-Ohio Regional Planning Commission, "Insight 2050: Scenario Results Report."

¹⁰⁶ Keith Larsen, "HUD Expands Low-Income Housing Tax Credit Program to Encourage Opportunity Zones Investment," *The Real Deal Miami* (blog), February 25, 2019, <https://therealdeal.com/miami/2019/02/25/hud-expands-low-income-housing-tax-credit-program-to-encourage-opportunity-zones-investment/>.

investment provides long-term emphasis and increased probability of successful complete corridors. The coordination should consider setting a table for conversation with other economic development practitioners, developers, Community Reinvestment Act banking officers, and private sector employers and developers to understand where synergy and possible alignment exists around small business, workforce, and housing development in these priority corridors.

An equitable OZ and corridor strategy around mixed-use, mixed income housing with intentional outreach to existing business owners and residents can build off the City's groundwork on the One Linden and Hill Top plans as well as the current infrastructure enhancement and tax increment finance district in the Westland Mall area. These efforts cannot be disparate items and are opportunities to develop and exercise EDP's equitable economic and community development framework in a cross-department and intergovernmental manner.

Leverage Housing Funding and Policy

EDP's concern for keeping affordable housing affordable requires a repositioning of funding to leverage other actors. COCIC's strategic Land Trust model seeks to do this. Franklin County's involvement in the Land Trust's model to develop affordable, single site residential homes on land bank lots and create sustainable equity has merit in that it addresses two goals. First, the income eligible homebuyer gains wealth from the asset, and second the housing remains affordable due to the Trust's 99 year land lease to the buyer, where the Trust continues to own the land. The model is building shared equity.

The Ohio Housing Financing Agency (OHFA) should also be part of Franklin County's calculus as it concerns current OHFA Qualified Allocation Plan (QAP) and promoting changes to the QAP that would drive impact. For example, funding considerations include additional points for workforce housing if it supports residents, connects them with access to transit, and has supportive services such as job training opportunities that have the intent to convert into a job. Recent Residences at Career Gateway is an example, where the partnership of NRP Group and Community Development for all People is taking advantage of the Nationwide Children's Hospital on the Parsons Avenue Corridor.

Another possible QAP concerns stretching affordable housing into opportunity spaces in municipalities, where good schools and transit exist. These are likely opportunities in the suburbs, where the need for more affordable housing is evident in the maps exhibited in the earlier People Capacity section. Although the narrative may be that many municipalities are resistant to growth, and specifically a "not in my backyard" (NIMBY) resistance to affordable housing, Franklin County EDP could lead a focused effort to educate local officials and residents on the merits of coordinated economic and community development. For example, local township officials stated that although their residents are resistant to new growth, they want to diversify their tax burden. Discussions could include how zoning requirements on development setbacks challenge the tax base of government, taking potentially taxable land away from development. Another topic is that communities that desire facilities and recreation centers often bear a new local tax for the construction. However, this amount could be less if the community allowed more building of housing to generate a greater tax base—property, sales, and income.

Corridor mixed-income development is another opportunity that Franklin County could leverage under the OHFA FHact50 (fair housing act), launched in 2018. Columbus will receive \$30M in tax credits over

ten years to focus on a neighborhood where affordability is at risk. The Columbus Housing Administrator will be selecting the neighborhood, but Franklin County could leverage this development and invest more around the selected neighborhood if the geography is near county borders.

As with the Poverty Study's call for rethinking the zoning issues in high poverty neighborhoods, Franklin County EDP could also consider design standards that could incent creativity and offer cost containment and unit production. Minimum architecture and design standards may sponsor greater production while reducing construction time to market, materials, and labor. Modular construction and different materials would need to meet neighborhood and municipality design standards. Franklin County could coordinate a conversation across the municipalities to standardize and make it easier for developers building region wide.

Rickenbacker Global Logistics Park, FTZ, and Airport

The question of how to be more intentional with Rickenbacker as asset will require a coordinated partnership effort from Franklin County, the CRAA, Pickaway, and other municipalities including the joint economic zones. The CRAA's airport master planning and economic impact study in addition to the MORPC area study provides the analysis for this deep dive.

As discussed above, the FTZ could be a business opportunity. However, focusing more directly on TDL and the intermodal asset, the upscaling of these jobs in wages and career pathways could do more for the municipalities and its people while future proofing for the next generation of TDL and coming sector disruption. Evolving the distribution monoculture into advanced manufacturing and services would leverage the collocated assets, the FTZ, and proximity to transportation facilities for raw materials sourcing and product distribution.

Leveraging the Smart Columbus initiatives could foster the Rickenbacker's reputation as a hub of smart transportation technologies development and deployment. One such initiative is the Freight Signal Priority technology, to be installed on the traffic signals along Alum Creek Drive. The technology will allow for truck platooning once trucks reach the interstate system. The vast availability of land offers room for test tracks and other environs essential to proof of concept and testing of devices on various fleets of vehicle type, such as energy efficiency, electric vehicles, etc.

Rethink/Redirect Energy Works resources

The EnergyWorks program has performed well and is consistent with strategic priorities, but the market has evolved and it appears that many of the county's objectives can be achieved through both private and other CFFA financing options. Assuming CFFA remains an important local player in energy finance for commercial properties, it is not yet self-sufficient as the early returns have only begun to replenish the loan fund. Considering ways to pursue unmet energy efficiency priorities for housing and industrial properties may be another transition option. For example, although the EnergyWorks program is for commercial uses, there may be opportunity to bring it into these affordable housing conversations with developers, including the Land Trust funding. Warehouse distribution facilities may also provide opportunity for the embedding of the EnergyWorks goals for future development and retrofit initiatives.

Workforce Mobility as an Asset

In the people capacity section, workforce mobility is a weakness, yet a concerted multi-modal mindset to place development could flip the standard logic and frame workforce mobility as the asset because companies and developers desire it in order to improve their access to workforce and sales easier.

Industrial development more likely occurs in a location that is farther from affordable housing and other development, such as Rickenbacker. A focus on workforce mobility as an asset requires a comprehensive approach that includes housing development, transit improvements, and innovative mobility solutions. Minimizing transportation and transit barriers enable areas to have greater appeal to different types of companies, and workforce commutes can take less time, lower cost burdens, and may improve both workforce turnover and absenteeism costs. Franklin County's priorities in infrastructure, land use, and business development could utilize the frame of workforce mobility as asset. A long-term, holistic view to support the asset of workforce considers transportation and transit as a necessary service to the new development and/ or property. Elevating human capital in the mobility decision process means that it is part of the calculus and comparable to investment in hard capital, like utilities and other capacity infrastructure. Formal process acknowledgement can pave the way for a greater percentage of the workforce to participate in economy which is essential to increasing an economy's performance.

Policy Tools

Franklin County's innovative use of policy tools could allow it to advance new comprehensive economic and community development priorities. The existence of tools enabled through the Ohio Revised Code, such as Transportation Improvement Districts (TID) or Special Improvement Districts (SID), could be utilized to pool resources to advance infrastructure investments and operations. Accords and Joint Economic Development Districts would allow multiple jurisdictions to collaborate on advancing the development of an area. As more communities look to meet the challenges of first/last mile and workforce connections, there is an opportunity to partner with local municipalities to explore resources such as Tax Increment Financing (TIF), property tax abatement payment in lieu of taxes (PILOT) payments, and the redirection of funds otherwise used for tourism and economic development for new transit offerings.

The TID tool facilitates multi-jurisdictional projects, intergovernmental cooperation, and one-stop shop for financing transportation improvements that promote economic development. The value of the TID is its flexibility and how it can expedite projects more efficiently than standard procedures. The ideal TID application presents one voice that has financially competent, well-funded implementation partners. Franklin County sees the need for project development in south part of county, and EDP could need to lead the effort in educating and bringing the effected municipalities into the partnership. The TID could start with projects that motivate all entities' support and are small (intersection improvements, corridor widening, bridges, etc.) with high success rates that grow in sophistication with success. The Franklin County Engineer is currently in the process of leading the effort of public hearings to enable the structure to be in place in time for application to the Ohio Department of Transportation in May 2019. EDP will have seat on board, which will allow greater knowledge of development and other possible streams of funding opportunities. EDP can be a leader and use its position to magnify the TID and extend its reach to other worthy priority projects.

The Franklin County Infrastructure Bank FCIB/InfrastructureWorks receives praise from participants. The pipeline of projects is expanding, and it supports other strategic priorities related to growth and work with sub-county jurisdictions. It is poised to grow and help speed certain types of infrastructure investments; however, it will need greater outreach. InfrastructureWorks can serve as the platform for engaging, preparing, and helping Franklin County's political subdivisions make wise infrastructure investment decisions to support growth in a manner consistent with their own and regional economic development priorities.

Interjurisdictional Development Collaboration

A tool that could enable consistent prioritization of workforce, transportation, transit, and housing in development would be the establishment of a Development Waiver process. In the transportation field, this is a leading practice and a collaborative solution that ensures transportation and transit networks can or will support future population, employer, and workforce needs. The waiver is an authorization for approval of new development and provides a mode of communication among jurisdiction, developer, and transit, transportation, and economic development planning authorities. The pre-development review and scoring could begin as a coordinated pilot that would examine workforce mobility impacts based on a project's size and forecasts and provide guidance to needed investments in housing and infrastructure. The effort would require the development of a technical methodology to support the scoring and further research on the legal ramifications. The waiver may need municipal variation and may be a preemption of local authority that will require coordinated negotiation. However, if the pilot could rise to a coordinated regional agreement, the process would price growth more directly and could provide a more comprehensive equitable lens to development.

Place Opportunities Wrap

The opportunities of place are ample, and since each requires leadership and collaboration of multiple stakeholders to achieve the desired impact, the actions require similar steps. Active partnerships and innovative policy can accelerate and align OZs and corridors of concern to be ready for development. This would include efforts to leverage housing funds and redesign of EnergyWorks. The Rickenbacker case can also be a testing ground for further interjurisdictional development collaboration to purposefully plan the integration of workforce mobility around Rickenbacker's potential. Connecting the issues in an overall strategy and using supportive tools for growth in a comprehensive manner will provide consistency to funding and partnerships as well as interactions with municipalities, developers, and nonprofits.

Threat: Place

The opportunity section suggests multiple tools to address the housing, workforce, as well as commercial corridors or large-scale development like Rickenbacker. With the growth challenges ahead, Franklin County EDP needs creative and innovative approaches to prepare and mitigate the negative externalities it will continue to bring.

Transportation and Expansion

State transportation funding levels continue to decline as seen in 2018; after receiving hundreds of million dollars in funding requests, major infrastructure funding only granted \$60M. In terms of transit,

COTA is exploring all possible means to fund existing and expanded operations; however, total service hours are limited due to the budget. Any additional service would likely be at the expense of cancelling lesser-utilized routes unless other funding surfaces and there is formal recognition that development must fund workforce mobility. Aging infrastructure requires creative, collective approaches to ensure the foundations of future growth.

National and Global Connectivity

A globally-integrated economy is critical to future growth and increasing wages. However, Columbus lags given its size and central location. In comparison to similarly-sized metros, the region's 2017 trade-intensive exports as a share of gross domestic product were only 8.2%,¹⁰⁷ and it had only an average of 4.8% total private employment in foreign-owned establishments in 2011.¹⁰⁸ Columbus' level of air cargo activity (1 million pounds of landed cargo weight) is below both Indianapolis (5 million pounds) and Cincinnati (4 million pounds).¹⁰⁹ Finally, at 3.7 million passenger enplanements in 2017, it had an average amount compared to benchmark regions. Yet, conversations with stakeholders noted that the lack of direct flights created difficulty. The indicators suggest how "local" and internally reliant the Columbus regional economy is. With few robust external circuit breakers, growth challenges are likely to create an implosion.

Place Threats Wrap

The time is now for planning and reinvestment to stay ahead of the place capacity threats to growth and before the economy starts to sputter and exacerbate negative spillovers from a "business as usual" attitude that does not effectively plan for growth. This includes bolstering old infrastructure and expanding it to address the business-place-workforce issues. Planning is even more eminent given the weakness of global integration. For Franklin County, the forecasted population growth will increase its social service delivery obligation and should compel a comprehensive and integrated economic and community development strategy.

Place Capacity Conclusion

Franklin County and the Columbus region are at the crossroads where the Columbus Way seems an asset, but a larger collaborative with a greater diversity of stakeholders and opinions must enter into the decision making process and pave a shared pathway to preparing for and mitigating growth.



Policy and Governance Capacity SWOT

Policy and governance capacity identifies the core powers of government and its ability to set the rules and regulations guiding investments and incentives that enable people, business, and place to realize full potential. For Franklin County EDP, leadership, direction, and guidance are particularly relevant in its relationships with sub-county municipalities. With 17 townships, 16 cities, and 10 villages, the County

¹⁰⁷ Avalanche Consulting, "Regional Economic Development Assessment: Report 1: Economic Assessment and Community Benchmarking," 24.

¹⁰⁸ Avalanche Consulting, 28.

¹⁰⁹ Avalanche Consulting, 27.

performs many roles, including funder, administrator, partner, and capacity-builder to those communities lacking economic and community development staff and expertise. In addition, within Franklin County government, EDP could build collaboration to capitalize on their equitable capacity-focused work with other departments that have overlapping programs and initiatives. The County's recent policy discussions following the Poverty Study and Economic Inclusion Advisory Council's work exhibit intention to address these critical issues and provide fertile ground for collective progress on equitable and inclusive economic and social policies.

Strength: Policy and Governance

EDP Team: Step into the void and lead.

The Franklin County EDP staff has the right outlook to be both leaders and collaborators in the effort to address the varied consequences of Franklin County's future growth—within, across departments, and with County municipalities, intergovernmental stakeholders, partners, and nonprofit providers. The depth of talent provides a solid foundation to take a comprehensive examination of the economic and community development impacts and roles that EDP can play. The EDP staff is concerned, well-intended, and motivated—necessary qualities to push the conversation on how EDP can make a difference within the County and for the residents and businesses. EDP showed its willingness to experiment with programs to address needs (SmartWorks). It should continue to drive policy conversations, identify their niche, set goals, and be present at the table—if not setting the table—with the intent to be a leader, a partner, and a resource. EDP should continue to define innovative policy spaces that allow for rapid prototyping and experimentation with measurable objectives and assessment standards. The efforts require a commitment to creativity, flexibility, adaptability, resistance to business as usual, and not being afraid to fail. Step into the void and lead.

Franklin County Reputation for Good Governance and Strong Systems

The standards of good government are evident in Franklin County and programs that EDP utilizes. SmartWorks programs are well-run, consistent with Franklin County's strategic priorities, and are generating desired outcomes. It takes time to create a program with appropriate rules to safeguard the use of taxpayer funds, to raise awareness of the program among potential applicants, and to identify good projects that can generate the desired results. Economic development groups that rush through these steps in the interest of getting money out faster often regret their haste as weak governance and poor-quality projects undermine their efforts. Finding space for creative experimentation may be difficult, but building consensus and connecting EDP concerns directly to Commissioner and other departmental priorities and programs may allow EDP to further the discussion and provide opportunity for innovative testing of new models.

New leadership, Regional Planning Activity, and Call for Collaboration: "X is no longer left out of economic development conversation"

New leadership and reorganization of several important entities (e.g. COTA and WDBCO) in the economic development conversation revive strength and ownership across the Columbus status quo. Translating these into ownership and thoughtful collaborative implementation is essential for the plans to not just sit on the shelf. Increasing the level of transparency, sharing information and vital messages,

and having wider conversations can increase understanding and build an integrative system perspective of the economy. The new mantra needs to be “X is no longer left out of economic development conversation”.

Policy and Governance Strengths Wrap

EDP’s talent and willingness to experiment from within a good governance system sets a stage for meaningful engagement in the conversation with external partners who also have momentum and potential to change. From an internal to an external perspective, Franklin County EDP has the capability to harness their strengths in a consistent and productive approach to comprehensive equitable economic and community development.

Weakness: Policy and Governance

Program-Think Dominates instead of Region-Think: Break the cycle

Many programs continue to be status quo with no evolution. However, some programs are not meeting current needs or changing based on forecasted need. The dynamics behind this could be a lack of setting upfront measurable objectives, conducting regular assessments, and/or basing programs on regular budget items and allotments without stating the case of what needs to change with the associated cost.

This is not just an internal issue to EDP and Franklin County; it is evident in the approach to funding partners that address housing, workforce, entrepreneurship, etc. Determining if the roots of the issue are the result of a cultural artifact, a communication problem, or the currently acceptable nature of collaboration is essential to break the cycle because it dynamically affects a number of issues and results in inaction that does not meet resident needs in terms of participation or benefit.

Economic Development Program Flexibility, Communication, and Marketing

There is a perception that Franklin County’s funding is often too restrictive around location preferences rather than the qualities that exist in those locations that may lead to better results and meet resident needs. Place-based location preferences don’t necessarily mean the recipient business needs to be in that location if the incentive is tied to the desired action in the location, such as hiring people from that neighborhood location. Pushing to place-conscious outcomes is essential and recognizes that the flows of people and businesses collect services and opportunities outside of the places they reside.

The outreach of some programs is also limited. A more effective and efficient communication, marketing, and education strategy is fundamental. Intentional and regular engagement with groups of business owners, workforce providers, and small business lenders could generate a greater understanding of the current needs, improve program design, and inform EDP about why some are not achieving expectations.

Define What Economic Development is in Franklin County

Outside of EDP, the general Franklin County government understanding of “What is economic development?” is too broad. Lack of clarity among Franklin County leadership and departments begets an attitude that “everything is economic development.” The dominant narrative results in EDP competing with other departments for attention and funds instead of objective program sharing. A more well-defined role for EDP that is clearly communicated within the County government would be

beneficial and spill over to more closely link the economic development and planning divisions on projects in a coordinated and strategic manner around County initiatives and municipal issues. The robust intersection of the dynamics of economic development with housing, land use, and zoning provides a foundation to build “action-oriented, interdisciplinary” teams, pulling across the department based on project needs for quality work and life outcomes.

Build Civic Capacity Breadth, Depth, and Trust

The Columbus Way has its benefits, but for the breadth of economic and social problems, the small venue it creates is too limited to activate cohesive and collaborative civic capacity and ownership. The work of nonprofits on regional priority issues (such as workforce development) relies on public and private sector partnership for support, and this can often create unhealthy competition instead of recognition that partnerships could more effectively and efficiently meet the needs of clients. In addition, the perception is that issues will not gain traction unless the private sector is convinced and activated to fund. Without the leadership of the Columbus Way and the Columbus Partnership, there is a lack of willingness in the nonprofit community to work together and lack of experience in moving a large agenda, whether alone or together. Trust and clarity on how the community can pull together on the large scale, comprehensive issues that face Columbus today must be nurtured.

The absence of a robust set of Community Development Corporations in Columbus serves as a meaningful example. In comparison to Indianapolis and Ohio’s own Cuyahoga and Hamilton Counties, the Columbus CDCs neither have enough capacity nor are they strong organizations. The factors that can stimulate CDC activity are strong local political leadership, strong local nonprofits that make generational, long-term commitment to a community, and a diversity of foundations that provide stable funding and support. The fact that Columbus’ private companies are still mostly in the first generation of founders’ lives suggests that the internal growth of their companies dominates their focus, and their philanthropic giving is much less reliable than that of generational family foundations.

The challenges facing the Columbus economy and those companies may be a rallying point and motivate a change of approach. Stronger leadership from Franklin County EDP could build regional capacity and trust among the civic community, activating a set of stakeholders that currently wait for others to lead in addressing the gaps among the comprehensive issues facing the region.

Policy and Governance Weaknesses Wrap

EDP can break the cycle that allows the continued non-comprehensive approach of program-think to dominate economic development conversations. Embedding region-think instead of program-think into the design of strategy, programs, and its outreach capacity will enable a more holistic outcome given limited resources. A conscious approach will serve to clearly communicate EDP’s vision of economic development within County government and enable clear lines of responsibility, partnering opportunities, and greater surety in outreach and assistance to municipal partners. The lack of leading CDCs and philanthropic giving can also benefit from a region-think vision and push the current nonprofit environment to understand the benefit of collaboration even when there is nothing directly tangible to the bottom line of the operating budget.

Opportunity: Policy and Governance

New Growth Framework: Interjurisdictional and Cross-sector Leadership, Partnership, and Collaboration

Franklin County EDP could capitalize on the activity, anxiety, and seemingly goodwill to confront the forecasted growth and troubling signs in a new way. Embracing a collective equitable growth framework and leading conversations that are intentionally collaborative can build trust, engender willingness to move issues together, and avoid reliance on participation of one essential partner. EDP could define a role that is consistent with other county and regional plans, aligned with EDP goals, and scaled to utilize current available resources with flexibility to grow if successful. Comprehensive equitable economic and community development could focus on tactics of affordable housing, local food access, financial empowerment, infrastructure improvements, understanding local business conditions and constraints, and fostering local leadership with partners and municipal leadership.

EDP could utilize the new framework to lead a taskforce that addresses pressing regional challenges, complements the work of existing partners, and creates a cooperative agenda where each partner is responsible based on their geography and mission. The framework would guide the defining of equitable goals to address quality jobs, geographical disparities, and diversity components in housing, workforce, transportation, transit, infrastructure, and sustainable financial and environmental conditions. The shared agenda encourages space for responsible parties to lead or partner where appropriate for specific goals, policies, or funding. To ensure this, the collaboration should design shared metrics that provide a guidepost to each partner's work and monitor progress. The deliberate effort could build trust among partners and identify where streamlining and decreased redundancy would create stronger results.

A longer-term consideration would be to build on the collaborative capacity- and trust-building effort to create a multi-faceted, integrated, centralized structure that is an intergovernmental, cross-sector partnership that includes non-profit and private economic and community development partners. The entity would be the planning, financial, and implementation entity that pools resources for impact while allowing for flexible implementation of tools to address different community/neighborhood needs. The advantage to this structure is that it is place-conscious and would empower the smaller efforts of nonprofits that lack sustainable funding and incent local partnerships. Structurally, each individual community across Franklin County, the cities, townships, and villages could have their own focused advisory boards that understand their unique needs and distinctions. The institutionalization effort directly confronts the lack of depth and breadth of CDCs in the region and jumpstarts the ecosystem to take on the big challenges are across place.

Creative solutions will be necessary to overcome hurdles and challenges, such as the County's restriction on spending related to economic development and other funding in incorporated city areas. However, now is the time to corral the region's organizational-centric, dispersed economic development planning activity in a collaborative conversation to do something different that intentionally addresses needs and has teeth.

A number of venues could serve as an initial testing ground for EDP and build its capacity to lead a wider regional approach.

- Franklin County’s Poverty Study and Economic Inclusion Advisory Council’s work with Forward Cities overlaps with EDP business and greater “neighborhood” concerns around business development, workforce, land use and zoning, and housing. Facilitating alignment where feasible and crafting a leadership role can more deeply associate EDP’s work with the Commissioners’ priorities and allow for creative policy design that could amplify the department’s potential impact. EDP could be an advisor and possibly lead the effort to embed metrics of equitable growth into Franklin County initiatives, such as:
 - generating good jobs defined by benefits and wages;
 - recognizing opportunities of win-win growth—equitable, inclusive, community driven; and
 - assessing gaps for categories of people (18-24 years old, returning Franklin County residents, reentry workers, individuals with disabilities, evicted, working poor, unemployed and underemployed, soft skills, cultural competency, etc.) and businesses (social enterprise, small business, etc.).
- Working with municipal leadership to prepare for growth could redefine how planned equitable growth can be beneficial for their residents. Technical assistance could include assessment of community needs, preparation of mitigation options through the adoption of good policies, and utilization of available county tools, programs, and resources. The MORPC Competitive Advantage Grant may be a vehicle for EDP. Assistance in the coordination of county and municipal prioritization of projects can ready them for federal funding application and encourage the involvement of private developers and stakeholders in the discussion of needs and design of creative approaches.
- MORPC is currently examining the eligibility of a multi-jurisdictional Economic Development District, authorized by the U.S. Economic Development Administration (EDA). The region already satisfies a central EDA criterion due to Columbus 2020’s Comprehensive Economic Development Strategy. However, many of the Central Ohio 11-county areas do not have high enough unemployment to qualify. Only Fayette and Marion Counties have low enough per-capita income, with 75.8% and 78.7% of the national average respectively. If conversations with the EDA determine that the region can move forward, the multi-jurisdictional entity is a venue where Franklin County could be a leader on an equitable growth framework conversation for the region.

Build Municipal Capacity and Increase Community Engagement

Franklin County EDP could make great strides toward improving intergovernmental relations through increased understanding of the needs of the diverse cities, villages, and townships. EDP could in turn utilize this knowledge in a number of innovative ways.

Development

EDP could serve as an ombudsman and point of contact for municipalities with developers that would coordinate and improve communication, decrease developers’ frustration, and improve understanding on which programs apply across interjurisdictional boundaries. Franklin County could lead a conversation to examine the impact from a regional perspective. The collected knowledge and data

“repository” could inform future decisions and possibly lead to consideration of streamlining and alignment of zoning, abatement, permitting, etc. in the additional seven townships that are not currently under one set of zoning standards. The effort intersects with the opportunity for a small business development and incentives portal outlined in the Business Capacity section.

Engagement

The intentional creation of an outreach and engagement function could also benefit Franklin County with community engagement in unincorporated areas of the county. Fostering greater lines of engagement with municipal elected officials, leaders, residents, and businesses allows EDP to ascertain and work to achieve community goals and benefits with creative EDP efforts. A tangible benefit of intentional and periodic outreach could generate an educational conversation that builds capacity and empowers local municipalities to make more strategic growth decisions. The engagement must give local officials, residents, and business a voice and not just a pre-determined direction or only occur when a project requires it. The function must also ensure feedback on how EDP is/has addressed previously discussed community issues to build trust and partnership potential.

Enabling an organized voice and greater sense of community identity will provide EDP with a stronger sense of how EDP can better design and implement tools that can assist an area. The culmination of these efforts could create the space that guides a county-wide vision among Franklin County Commissioners and municipal local officials to align incentives and regional priorities around equitable economic and community development issues of housing, transportation, transit, infrastructure—none of which stop at a jurisdiction’s borders.

Sustainable and Equitable Good Government and Governance: Prepare Franklin County to Lead and Win.

Commitment to good government and managing efforts carefully may seem less exciting, but being ***intentional and inclusive*** in framing a comprehensive equitable economic and community development strategy is new and galvanizing for EDP, Franklin County, and the region. Fine-tuning the work of EDP and asking hard questions can align existing programs with the new framework. Working to define measurable impact across priorities and programs internally and collaborating on cross-cutting programs areas is vital. Prepare Franklin County to Lead and Win.

Policy and Governance Opportunities Wrap

The equitable growth framework can enhance Franklin County EDP’s role, utility, and collaboration among its municipal partners, community residents and businesses, and even within Franklin County government. EDP could become a durable and stronger cross-sector partner in the region as it faces the challenges of growth ahead, helping shape broader conversations that can motivate change and the consensus to achieve it.

Threat: Policy and Governance

Lack of Coordination and Capacity

Creativity is essential in a Home Rule state that does not require municipalities to conduct comprehensive land use plans and thus lacks a vehicle to develop the capacity of municipalities to

understand growth's implications more clearly and create more consistent responses. The overreliance on federal funding for projects leads to complacency that cannot meet the demands of forecasted growth. The region's municipalities need to utilize tools to work together on these challenges. Franklin County EDP can be a collaborative leader that shapes and directs opportunity, changing the municipalities' passive, risk averseness that just lets things happen.

In 2010 when Columbus 2020 released its regional growth strategy, it highlighted many of the same strengths discussed in this Franklin County SWOT, but unfortunately the same weaknesses and threats also repeat—lack of a shared vision, growth of mostly low-paying jobs faster than the national average, education and research efforts not paying off in terms of retaining talent and transferring it into innovation and commercial applications, and cyclic government and nonprofit budgets that too tightly follow the economy. Columbus 2020 was the entity that was created to help bring the region together and move the region in a collaborative fashion to achieve economic growth from external efforts.

Although many claim that Columbus has a diversified portfolio that enables it to weather the storms and economic shocks, the current business as usual responses are neither growing a new economy nor one that is equitable. The “Columbus Way” needs to have more voices present at the table. Inclusive collaboration calls for wider regional conversations in order to build trust and ownership to make advances on the difficult challenges. Regional collaboration cannot continue to be given lip service and only have Columbus Way priorities addressed, while other more equitably-charged priorities are left to a fragmented set of actors that have little incentive or opportunity to learn from each other. If each continues to go it alone, the 2030 regional growth strategy may say the same exact thing but the economy will likely be declining and challenging the fiscal environment of Franklin County. The Columbus region needs new rules of the game and to recruit a new batch of players from a greater diversity of leagues to truly learn how to play better together strategically as a region.

Policy and Governance Threats Wrap

Policy and Governance Capacity Conclusion

The base strength and commitment is evident within EDP, and it has the capability to refresh the status quo of economic and community development in the county and region. Vital steps include sound, data-informed analysis, creative and calculated design of tactics and policies, intentional municipal and community engagement, and the willingness to lead, partner, and collaborate—internal to Franklin County government and externally—to move the needle for county residents and businesses for the good of the region.

Capacity-Focused SWOT Conclusion

The People, Business, Place, and Policy and Governance capacities shape the analysis of the critical issues facing Franklin County. The assessment of provides a diagnosis that allows EDP to understand where capacity is strong, increasing, weak, or decreasing and highlight where additional information is needed to understand roadblocks, stumbling blocks, and information gaps. A summary follows with a table capturing the SWOT element according to capacity.



People Capacity Lessons

People capacity focuses on individuals and challenges that influence their potential for economic and community development and opportunity. At its core, people capacity is about increasing individual or community skills, knowledge, and experience. The question is how to develop, connect, and attract people with skills and educational opportunities within the community.

On the surface, the region has recovered well from a recession and is forecasted to continue to grow. The youthfulness of the population and educational attainment levels would indicate a solid course. Even with the successes, three issues indicate a need. First, shoring up the population's educational attainment across today's youth and a diverse population will be critical to maintaining economic opportunity and fueling industry's need for educated labor. Second, the disparities of rising wages by skill, race, ethnicity, and job type limit economic opportunity. Third, lower labor force participation of an older, but productive segment of the population limits economic returns in the region. The collection of Franklin County's weaknesses (poverty, workforce system, and workforce mobility) suggests a need to focus on equitable and inclusive community discussions that examine steps to make change. People of color and those living in poverty that also have a lack of workforce opportunities or access to jobs bear a higher burden when government and stakeholders do not compute the effects on these communities. Greater community outreach and intentional engagement to assess the needs and gaps more clearly are essential, and Franklin County EDP could move in this direction, opening new channels of collaboration with residents and city, village, and township leadership.

Franklin County has a fiscally beneficial opportunity in enabling the participation of a greater diversity of residents and businesses in the economy. Priorities could include regional workforce strategies through leadership and partnerships that leverage diversity and increase opportunity for African-American and immigrant communities. The effort can also build on the energy in the County around poverty and economic inclusion initiatives.

The threats to Franklin County's future represent opportunities if its investment in people, from education to workforce skills, occurs in an equitable and inclusive manner. Attention to disruptive trends, like globalization, technological change, and demographic shifts, is necessary to address the changing nature of work, increasing levels of income disparities, and inequality of opportunity.

A comprehensive, integrated, systems-level approach to local economic development should recognize the need for quality growth, from the neighborhood up, linking place-, people-, and project-based economic development to what it should be—genuine economic and community development that

increases community well-being and economic opportunity in an inclusive and equitable manner. Franklin County EDP's leadership, inquiry, and development of creative policies and tools to address specific gaps in the issues of poverty, diversity, and regional workforce are vital to continuing and increasing its resident quality of life.

Business Capacity Lessons

Business capacity assesses the assets or challenges relevant to business, including evolving workforce needs and requirements, facilities and equipment, organization, and the production supply chain. Business capacity emphasizes adding or reallocating resources (employees, inventory, equipment, capital, etc.). A related and vital component of business capacity is the innovation and entrepreneurial capacity of a neighborhood, including the potential for generating new and growing existing small businesses as well as high-growth businesses.

The strengths of business capacity also hint to concerns. Business growth is occurring, but most sectors are just about the size of the national economy. The one sector with an advantage, finance and insurance, now accounts for 13% of the job base and is gaining jobs. But it actually lost establishments, and changes in the industry seem to be limiting its ability to contribute ever-more strongly to the economy. Another powerful industry, health care, is a local serving not traded, and its dominance creates both advantages and disadvantages, particularly related to wages. Determining what entrepreneurial ventures are growing by industry is essential to understanding how business growth may be changing in the region given the region's variation in types of entrepreneurship.

The weaknesses of business reflect the lack of priority sectors and suffering from manufacturing losses that were more likely replaced by low wage job growth and local serving sectors like health care. In terms of the entrepreneurial ecosystem, there is a redundancy of support services and lack of collaboration and leadership that seek to improve the ecosystem as a whole. The barriers to entrepreneurship diversity and types of small business support restricts opportunity to the normal high-tech, high-growth, traditional founders.

Franklin County's opportunity in business capacity is in the local ecosystem and improving the connections for entrepreneurs and small- and mid-sized business. Understanding the entrepreneurs, the sector, the type of entrepreneurship, and needs to develop them into next-generation economic contributors and success is vital. An initial start would be a portal that Franklin County could consolidate and centralize all practices in its municipalities and partner with the City to provide small business owners and aspiring owners with the regulatory and incentive information. Further partnering with the City on its ESO effort would address redundancy of services, connect the services in a meaningful way for business, leverage governmental efforts, and increase the likelihood that the entrepreneurship and small business ecosystem is receiving the support as designed. In addition, enhancing a local asset in a collective effort to evolve the TDL cluster centric Rickenbacker could accelerate next-generation, value-added economic potential.

The Columbus region's economy needs greater dynamism and investment in a collaborative framework to foster local firms, whether entrepreneurs or small, middle or large businesses to enable more equitable growth potential. The effort to ensure greater racial and ethnic distribution across growing

and good-paying industries focuses on how awareness of diversity can benefit the current economic base and traditional business models

A combination of trends on the region's business capacity will require industrial diversification. The effects of technological and economic disruption, a lack of core competencies in future technology growth areas, and the greater range of "work" from the results of staffing agencies and contract workers can upset the foundation and growth of the economy. These are disrupting retail, TDL, and healthcare business models. Additionally, the lack of diversification in industry yet domination of large firms on the employee base and tax revenues acts as an impermeable layer that creates a less inclusive environment and opportunity. The region thirsts for dynamism of the ecosystem in race, ethnicity, gender, and nurturing of more than just non-tech and high-growth entrepreneurship and small business.

Place Capacity Lessons

Place capacity focuses on the physical and environmental assets or challenges that influence the potential for economic and community development. It includes infrastructure, buildings and public spaces, but it is also essential to understand the physical and emotional relationship that residents have with their home, neighborhood, and town/city. Most people can identify assets that create a sense of pride in the neighborhood and describe what is missing. Place-building seeks to create desirable spaces where people are comfortable and can integrate into regional opportunities.

The strengths of place capacity are prevalent as the region has a growing, safe, and attractive Midwest reputation. The addition of Franklin County's central logistic assets suggests that Rickenbacker could be a prime opportunity for aggressive policy innovation with a comprehensive economic and community development approach. Working to activate other parcels of land in the Rickenbacker area for higher value-add industry that is complementary to the TDL operations as well as thoughtful tackling of the workforce mobility, transportation, and housing issues with an equitable framework would allow Rickenbacker to realize its potential.

The long shadow of inequitable growth and opportunity increases the need for efforts that can establish greater control over Franklin County development planning. A comprehensive approach requires transportation, transit, and utilities to be part of the housing decision making process in order to have a marked impact on the future of business, jobs, transportation, and infrastructure. More explicitly, the approach must recognize the inequities of the past born by the working poor, low income, and communities of color in order to change the course on the intersection of housing affordability and mobility.

The opportunities of place are ample, and since each requires leadership and collaboration of multiple stakeholders to achieve the impact, the actions require similar steps. Active partnerships and innovative policy can accelerate and align OZs and corridor of concern to be ready for development. This would include efforts to leverage housing funds and redesign of EnergyWorks. The Rickenbacker case can also be a testing ground for further interjurisdictional development collaboration to purposefully plan the integration of workforce mobility around Rickenbacker's potential. Connecting the issues in an overall strategy and using supportive tools for growth in a comprehensive manner will provide consistency to funding and partnerships as well as interactions with municipalities, developers, and nonprofits.

The time is now for planning and reinvestment to stay ahead of the place capacity threats to growth and before the economy starts to sputter and exacerbate negative spillovers from a “business as usual” attitude that does not effectively plan for growth. This includes bolstering old infrastructure and expanding it to address the business-place-workforce issues. Planning is even more eminent given the weakness of global integration. For Franklin County, the forecasted population growth will increase its social service delivery obligation and should compel a comprehensive and integrated economic and community development strategy.

Franklin County and the Columbus region are at the crossroads where the Columbus Way seems an asset, but a larger collaborative with a greater diversity of stakeholders and opinions must enter into the decision making process and pave a shared pathway to preparing for and mitigating growth.

Policy and Governance Capacity Lessons

Policy and governance capacity identifies the core powers of government and its ability to set the rules and regulations guiding investments and incentives that enable people, business, and place to realize full potential. For Franklin County EDP, leadership, direction, and guidance are particularly relevant in its relationships with sub-county municipalities. With 17 townships, 16 cities, and 10 villages, the County performs many roles, including funder, administrator, partner, and capacity-builder to those communities lacking economic and community development staff and expertise. In addition, within Franklin County government, EDP could build collaboration to capitalize on their equitable capacity-focused work with other departments that have overlapping programs and initiatives. The County’s recent policy discussions following the Poverty Study and Economic Inclusion Advisory Council’s work exhibit intention to address these critical issues and provide fertile ground for joint progress on equitable and inclusive economic and social policies.

EDP’s talent and willingness to experiment from within a good governance system sets a stage for meaningful engagement in the conversation with external partners who also have momentum and potential to change. From an internal to an external perspective, Franklin County EDP has capability to harness their strengths in a consistent and productive approach to comprehensive equitable economic and community development.

EDP can break the cycle that allows the continued incomprehensive approach of program-think to dominate economic development conversations. Embedding region-think into the design of strategy, programs, and its outreach capacity enables a more holistic outcome given limited resources. A conscious approach will serve to clearly communicate EDP’s vision of economic development within County government and enable clear lines of responsibility, partnering opportunities, and greater surety in outreach and assistance to municipal partners. The lack of leading CDCs and philanthropic giving can also benefit from a region-think vision and push the current nonprofit environment to understand the benefit of collaboration even when there is nothing directly tangible to the bottom line of the operating budget.

EDP has a grand opportunity with the establishment of an equitable growth framework. It can enhance Franklin County EDP’s role, utility, and collaboration among its municipal partners, community residents and businesses, and even within Franklin County government. EDP could become a durable and stronger





cross-sector partner in the region as it faces the challenges of growth ahead, helping shape broader conversations that can motivate change and the consensus to achieve it.

The current and forecasted economic situation and trends do not breed much confidence—without concerted action the region will likely experience economic decline. Franklin County will face increased fiscal risk due to the plausibility of an inequitable burden that will exacerbate the conditions of those already facing difficulty in the current economic, workforce, housing, and business environments. Lack of capacity at the municipal level and a closed, risk-averse culture limits willingness and thus levels of coordination to discuss options and share the responsibility to change.

Regional collaboration cannot continue to be given lip service and only have single municipal or Columbus Way-approved priorities addressed. If each continues to go it alone in the next chapter of Columbus, the 2030 regional growth strategy may say the same exact thing but the economy will likely be declining and challenging the fiscal environment of Franklin County. The Columbus region needs new rules of the game and to recruit a new batch of players from a greater diversity of leagues to truly learn how to play better together strategically as a region.

The base strength and commitment is evident within EDP, and it has the capability to refresh the status quo of economic and community development in the county and region. Vital steps include sound, data-informed analysis, creative and calculated design of tactics and policies, intentional municipal and community engagement, and the willingness to lead, partner, and collaborate—internal to Franklin County government and externally—to move the needle for county residents and businesses for the good of the region.

Capacity-Focused SWOT Table

	 People	 Business	 Place	 Policy and Governance
Strengths	Young population Educational attainment Population and job growth Declining unemployment Good labor force participation Rising wages but disparities	Business growth FIRE industry advantage Health care industry dominance Growth entrepreneurship (revenue and employment)	Reputation of attractive city/neighborhoods (although uneven) Rickenbacker land and central location Logistics assets	EDP talent and willing to experiment Good governance New regional leaders and energy Collaborative comprehensive economic development
Weaknesses	Persistent poverty dynamics Income and racial segregation Working poor Regional workforce system: <ul style="list-style-type: none"> • Workforce education levels and preparation • Fragmented workforce system approach • Soft skills collaboration with technical skills training Workforce mobility <ul style="list-style-type: none"> • Spatial mismatch 	Manufacturing losses and economic impact Job growth in low wage occupations/local serving sectors like healthcare Lack of priority sectors Entrepreneurial ecosystem and diversification of support; open innovation and access to capital Barriers to entrepreneurship diversity and small business	Inequitable growth Transportation, transit network and utilities Housing dynamics; affordability; inequitable impact on working poor, low income, and communities of color Segregation	Program-think needs to be region-think EDP outreach capacity and limited resources Better define economic development inside County and with municipalities and partners Civic capacity breadth, depth, and trust for collaboration Lack of CDCs and philanthropic giving
Opportunities	Leverage diversity Collaboration around County poverty efforts Regional workforce leadership and partnership to improve dialogue with the private sector Increasing opportunity for African-American and immigrant communities	Rickenbacker FTZ, value-added opportunity, and TDL cluster evolution E Entrepreneurship and small business support and alignment (entrepreneurs, neighborhood, social enterprise, middle stage)	Opportunity Zones and corridor readiness Leverage housing funds and policy Rickenbacker future uses and potential EnergyWorks rethink Workforce mobility Interjurisdictional development collaboration	Framework for interjurisdictional, cross-sector leadership and partnership Dividends from greater community engagement and with municipal partners Using consensus to motivate change Sustainable and equitable good government and governance
Threats	Importing talent Persistent diversity exclusion and racial disparities Workforce readiness for changing nature of work (staffing agencies, contract work, automation)	Lack of industrial diversification Economic disruption of sectors Greater use of staffing agencies/contract worker Core competencies in future technology growth areas Lack of inclusive environment	Transportation and infrastructure expansion Downside of not effectively planning for growth Lagging global integration Increasing social service obligations	Lack of action to address current and forecasted economic situation and trends Macroeconomic decline and fiscal risk Lack of capacity at local levels Lack of coordination and closed, risk averse culture

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Appendix

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Franklin County Poverty Analysis

Michael Outrich, Mikyung Baek, PhD., and Glennon Sweeney



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POVERTY OVERVIEW



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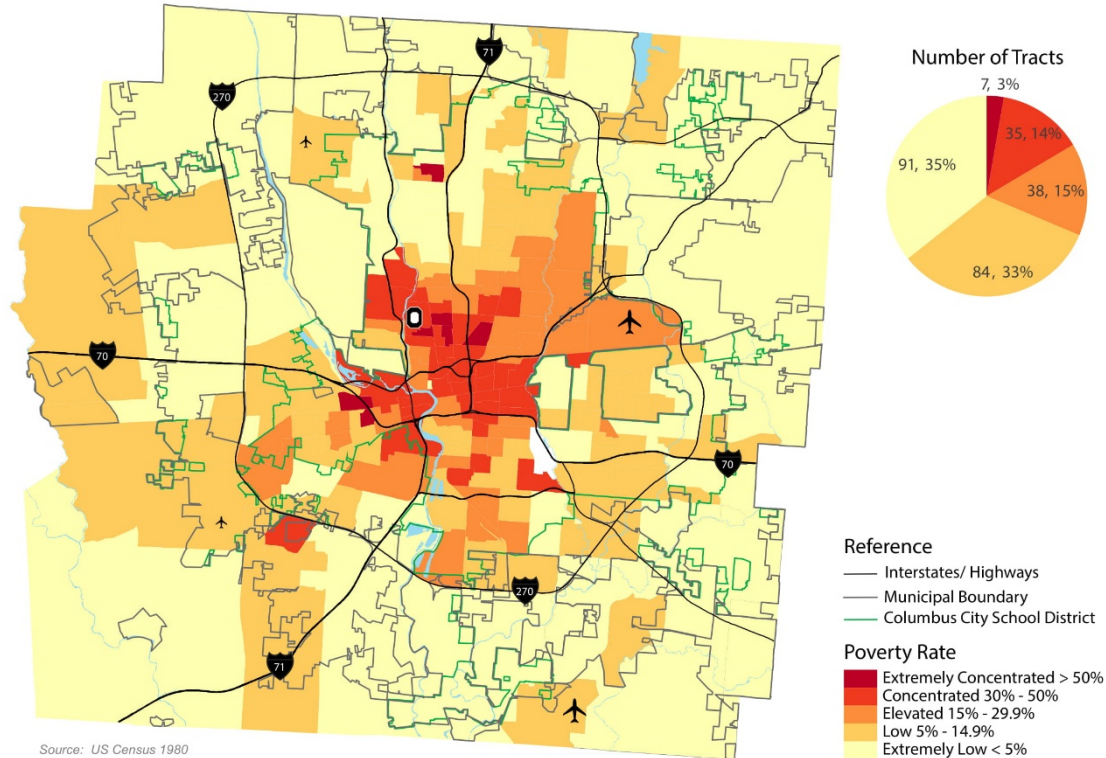
POVERTY 1980-2016

- The official federal poverty definition “uses money income before taxes and does not include capital gains or noncash benefits” – US Census
 - \$12,140 for individuals
 - \$16,460 for a family of 2
 - \$20,780 for a family of 3
 - \$25,100 for a family of 4
 - \$29,420 for a family of 5
 - \$33,740 for a family of 6
 - \$38,060 for a family of 7
 - \$42,380 for a family of 8
- The following series of maps illustrate poverty in Franklin County using decennial census data from 1980-2000 and 5-year American Community Survey data for 2000, 2015, and 2016
- In the poverty maps, darker colors indicate higher rates of poverty
- The colors on the concentrated poverty maps indicate the racial majority in each census tract
- When examining these maps, pay attention to the geographic and racial patterns of concentrated poverty, where poverty is growing, and areas that maintain low poverty rates over time.



POVERTY OVER TIME: 1980

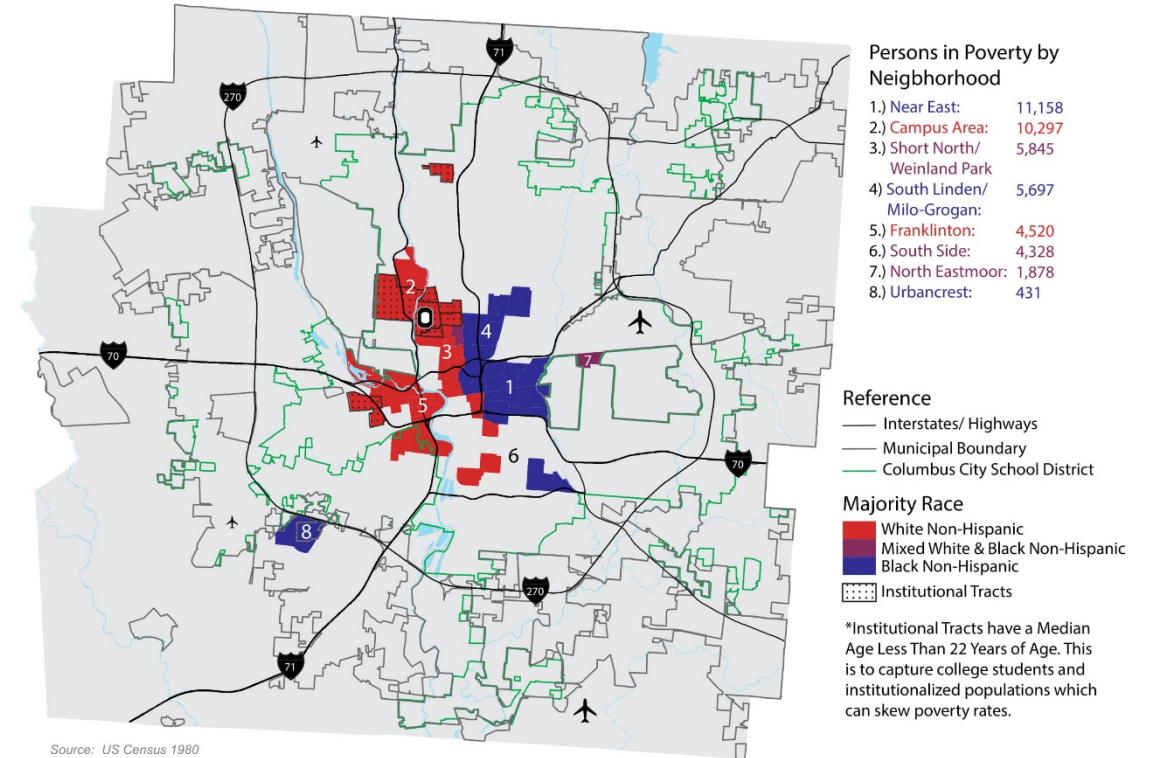
Franklin County Poverty Rates in 1980



Source: US Census 1980

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

1980 Concentrated Poverty Tracts by Race

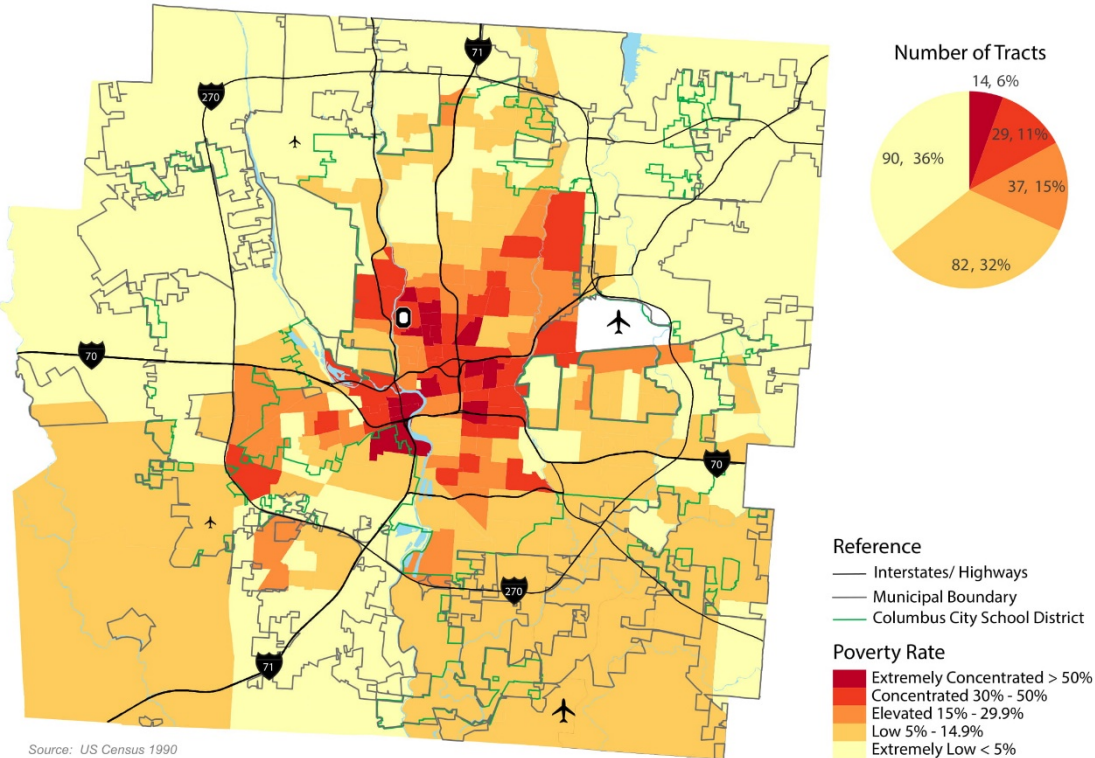


Source: US Census 1980

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

POVERTY OVER TIME: 1990

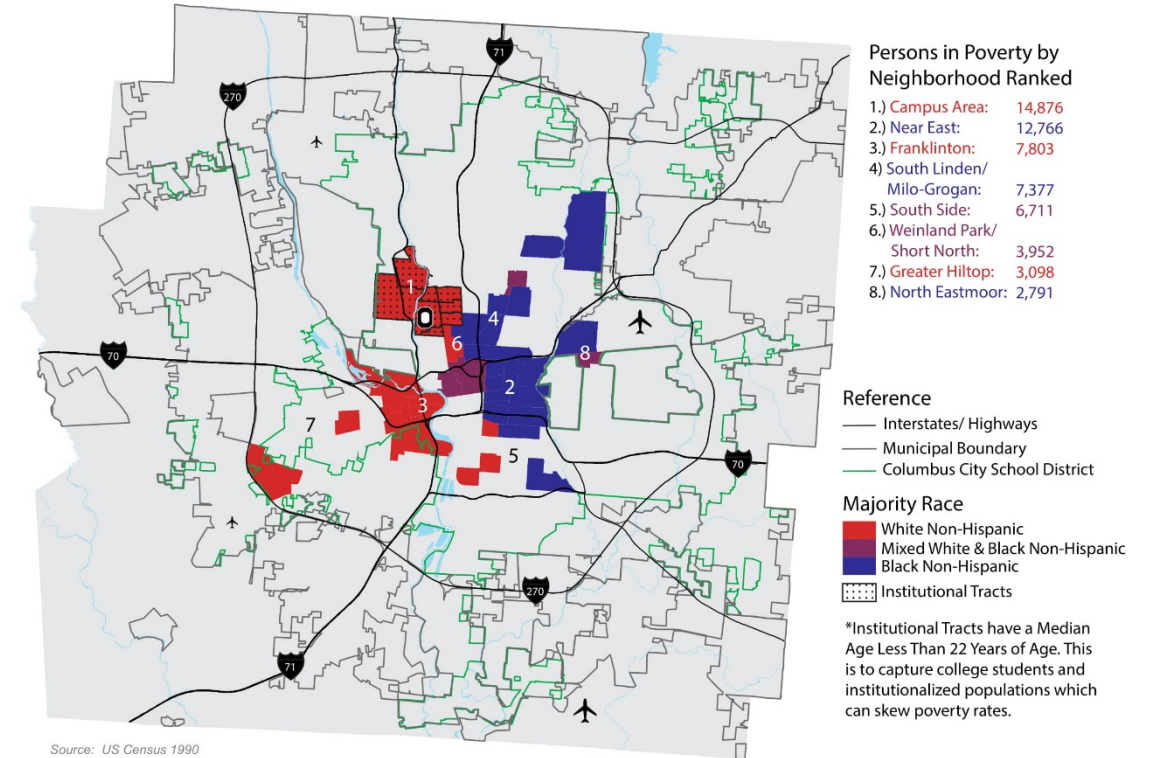
Franklin County Poverty Rates in 1990



Source: US Census 1990

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

1990 Concentrated Poverty Tracts by Race

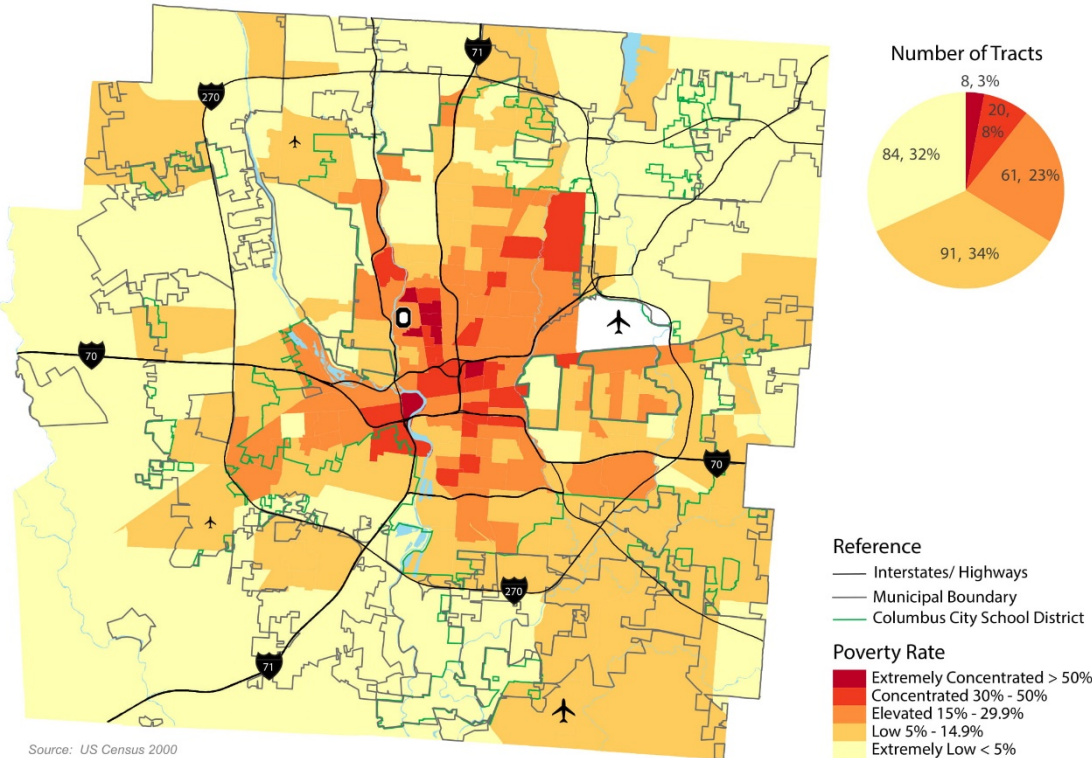


Source: US Census 1990

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

POVERTY OVER TIME: 2000

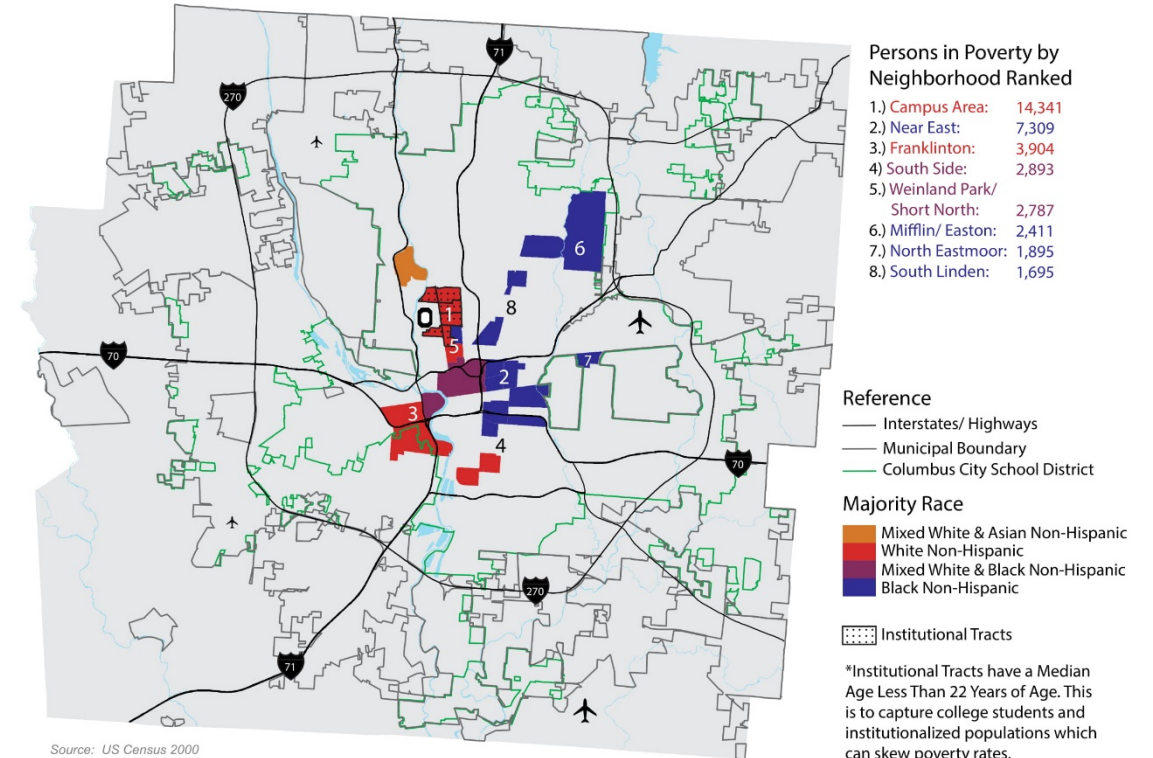
Franklin County Poverty Rates in 2000



Source: US Census 2000

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

2000 Concentrated Poverty Tracts by Race

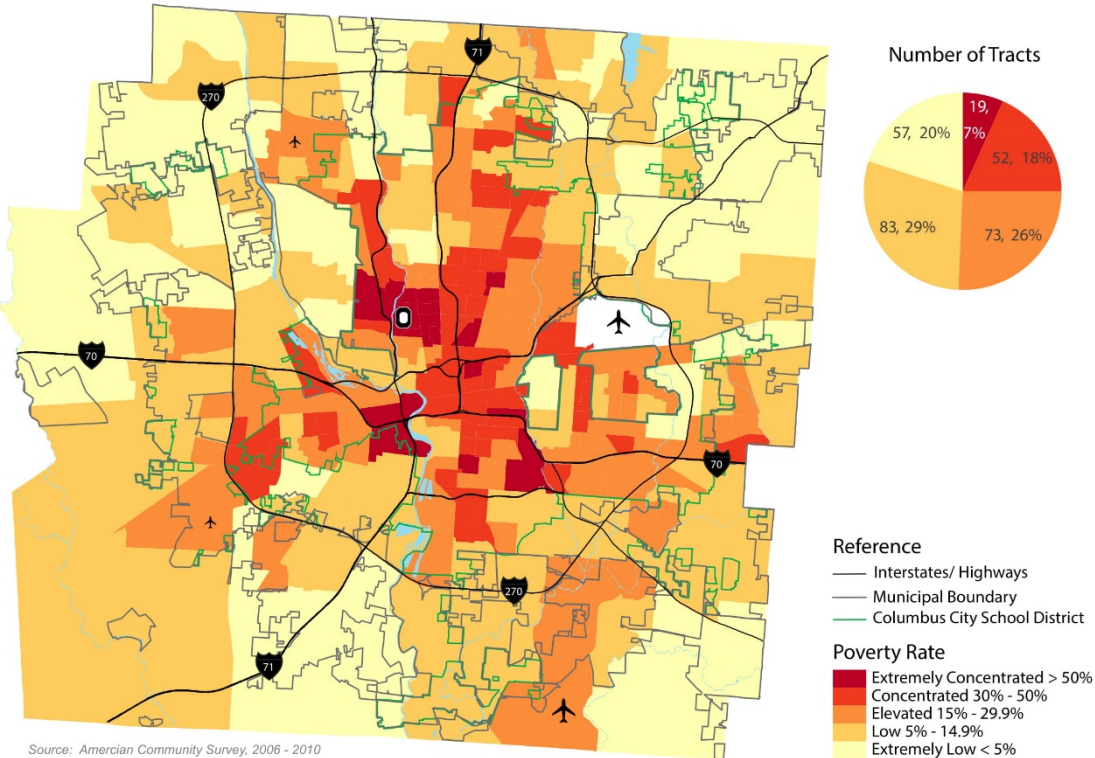


Source: US Census 2000

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

POVERTY OVER TIME: 2010

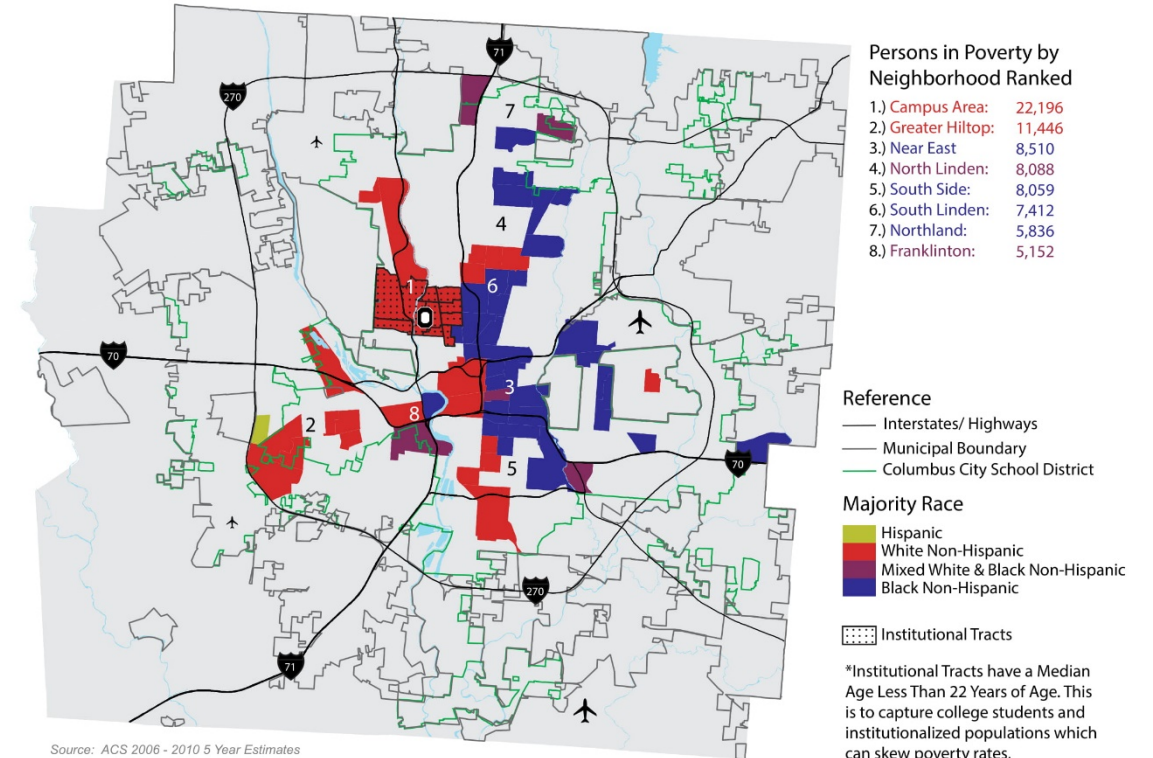
Franklin County Poverty Rates in 2010



Source: American Community Survey, 2006 - 2010

**School District and Municipal Boundaries are approximate for legibility reasons

2010 Concentrated Poverty Tracts by Race

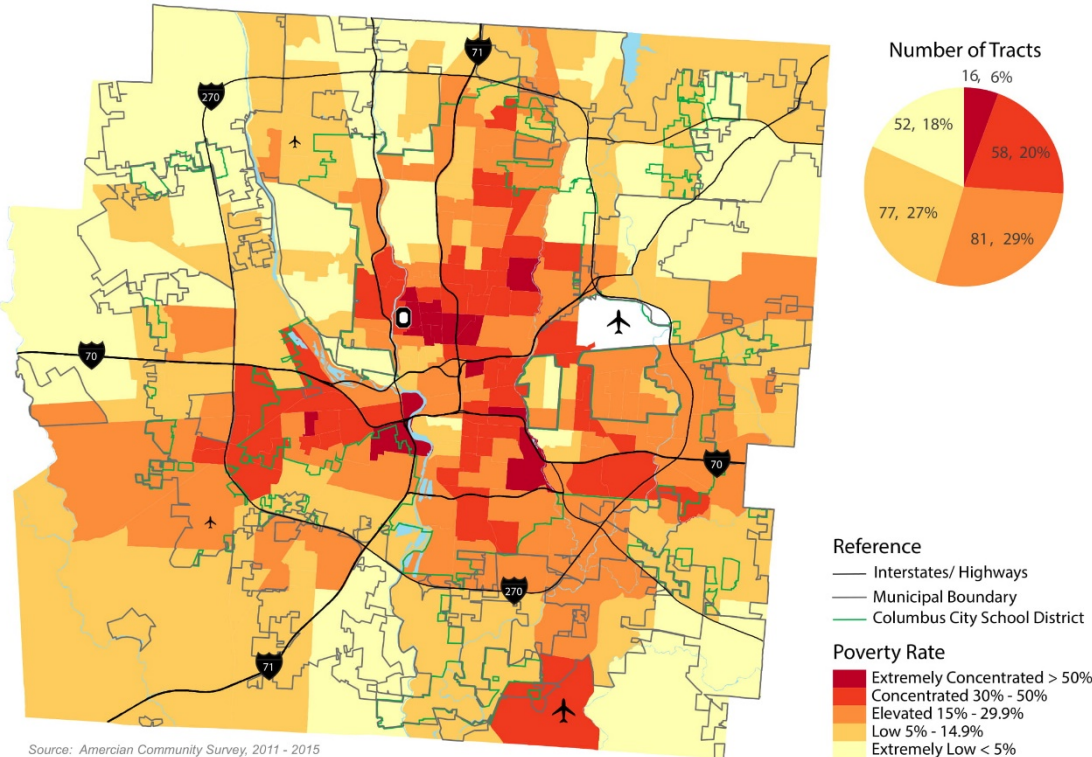


Source: ACS 2006 - 2010 5 Year Estimates

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

POVERTY OVER TIME: 2015

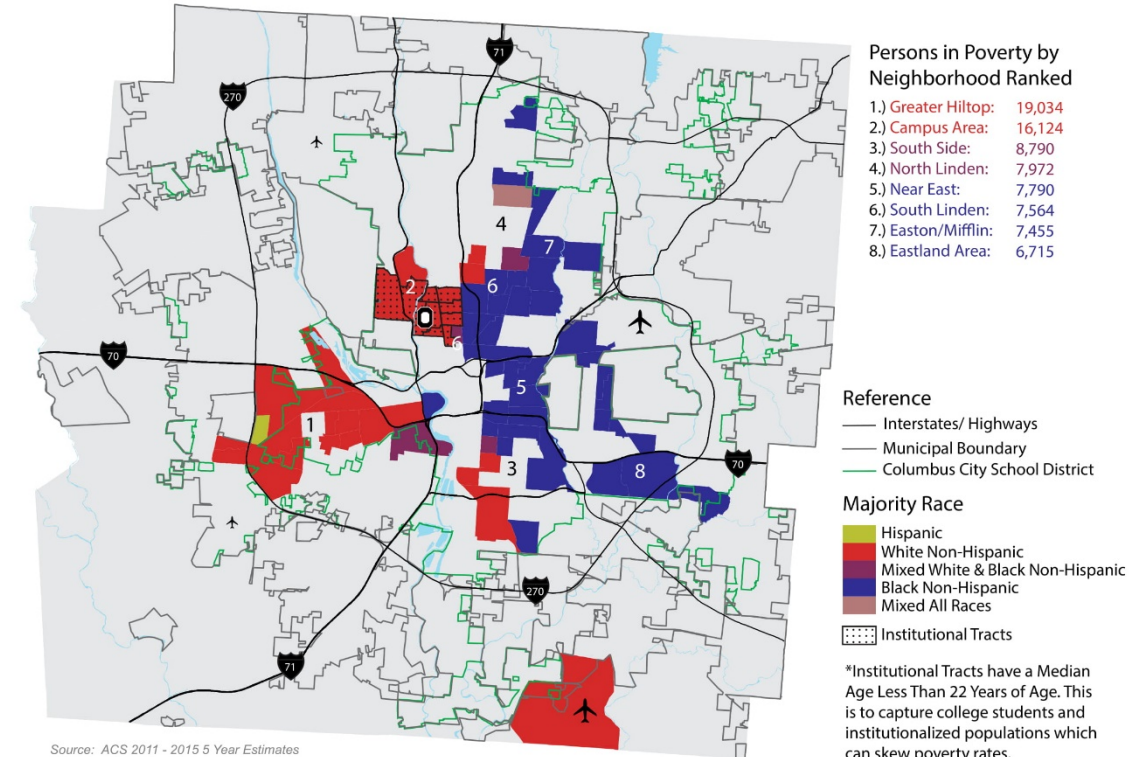
Franklin County Poverty Rates in 2015



Source: American Community Survey, 2011 - 2015

**School District and Municipal Boundaries are approximate for legibility reasons

2015 Concentrated Poverty Tracts by Race

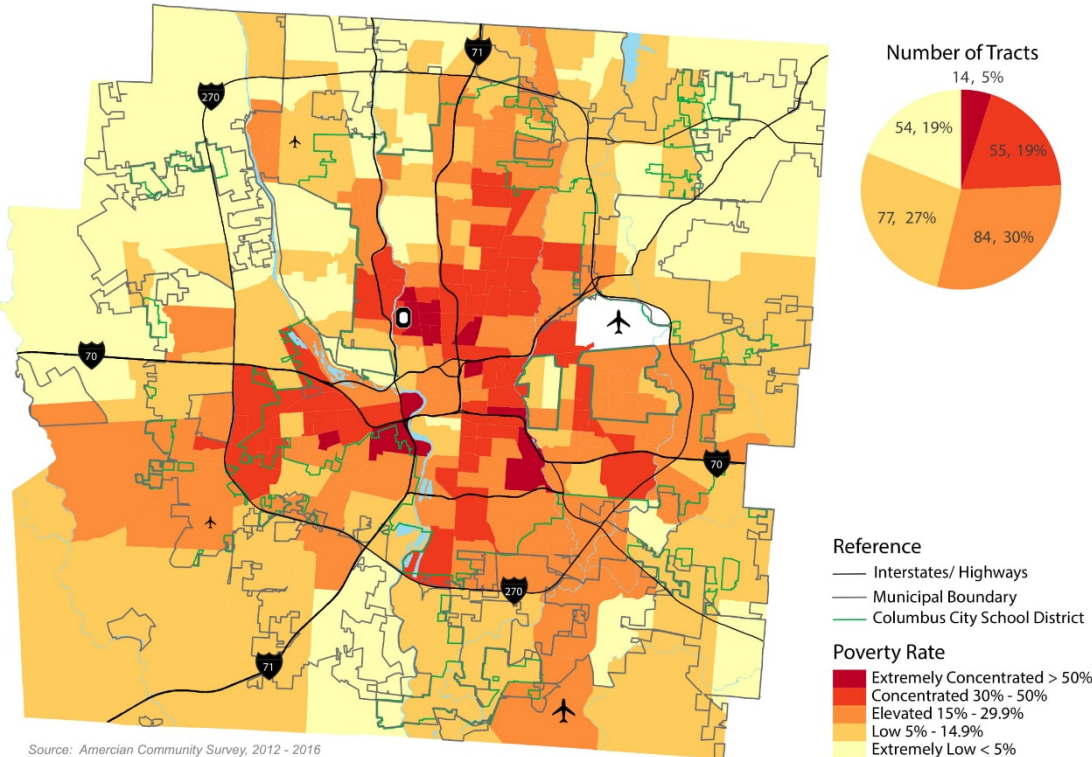


Source: ACS 2011 - 2015 5 Year Estimates

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

POVERTY OVER TIME: 2016

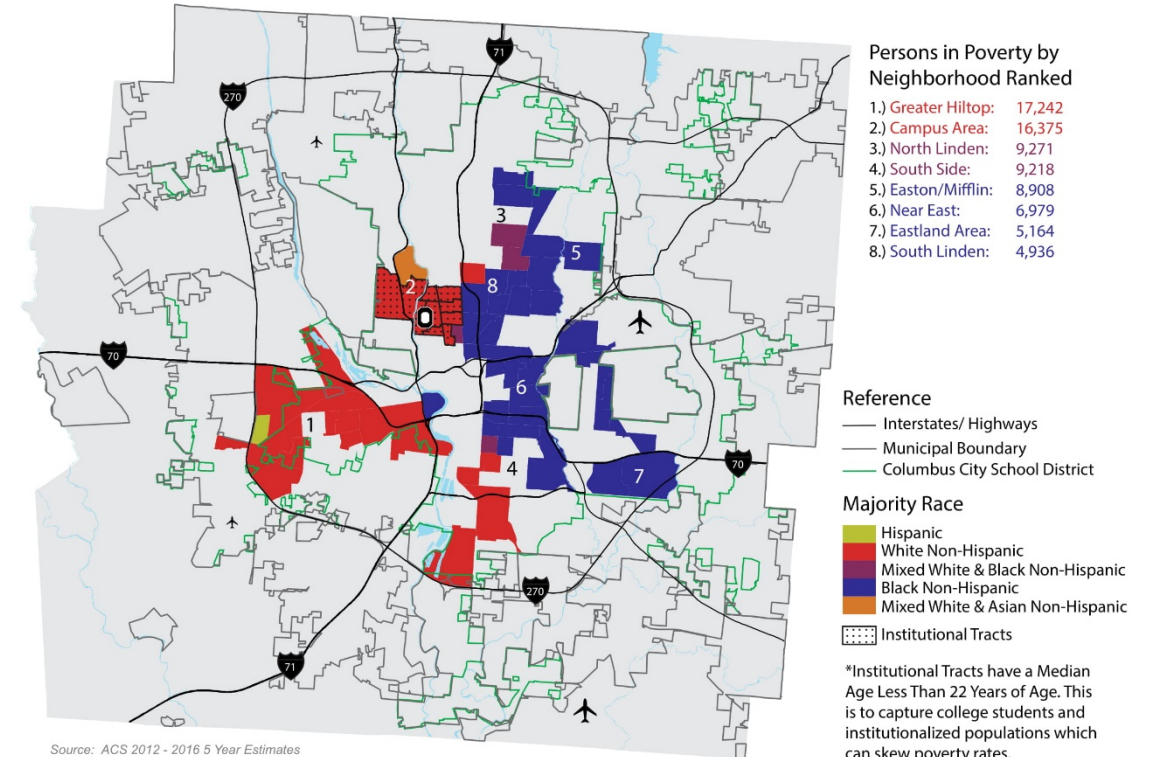
Franklin County Poverty Rates in 2016



Source: American Community Survey, 2012 - 2016

**School District and Municipal Boundaries are approximate for legibility reasons

2016 Concentrated Poverty Tracts by Race

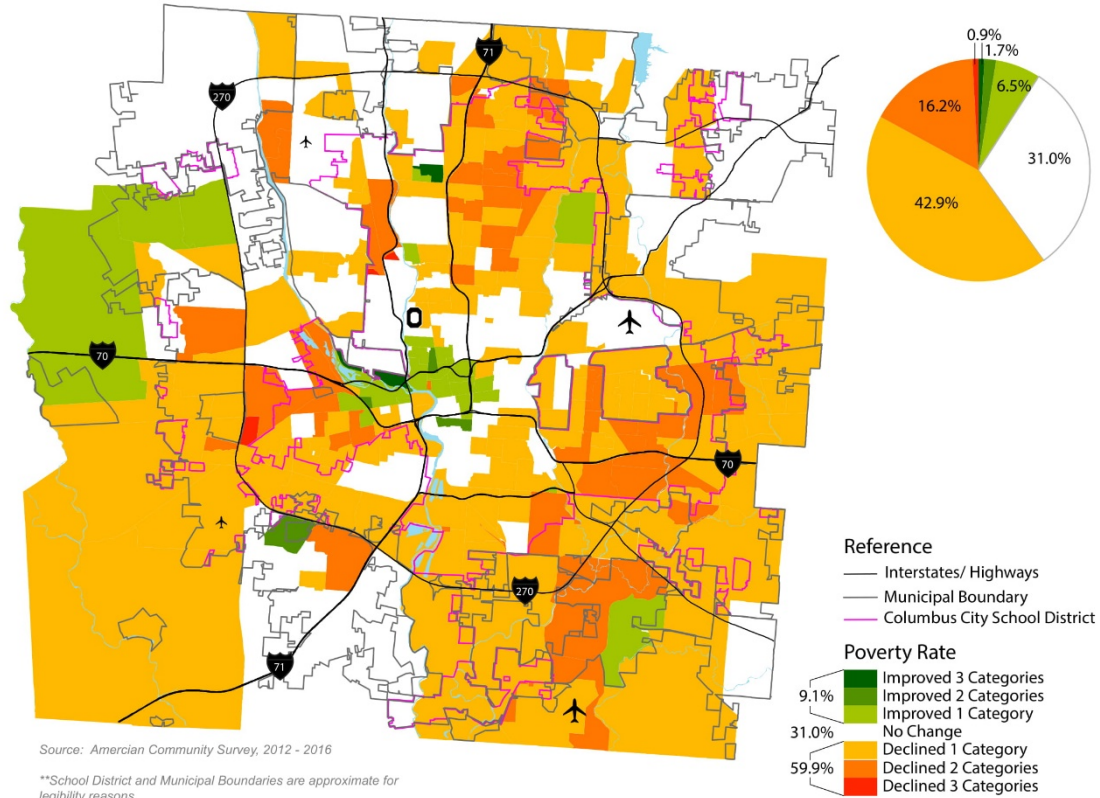


Source: ACS 2012 - 2016 5 Year Estimates

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

CHANGE IN POVERTY OVER TIME

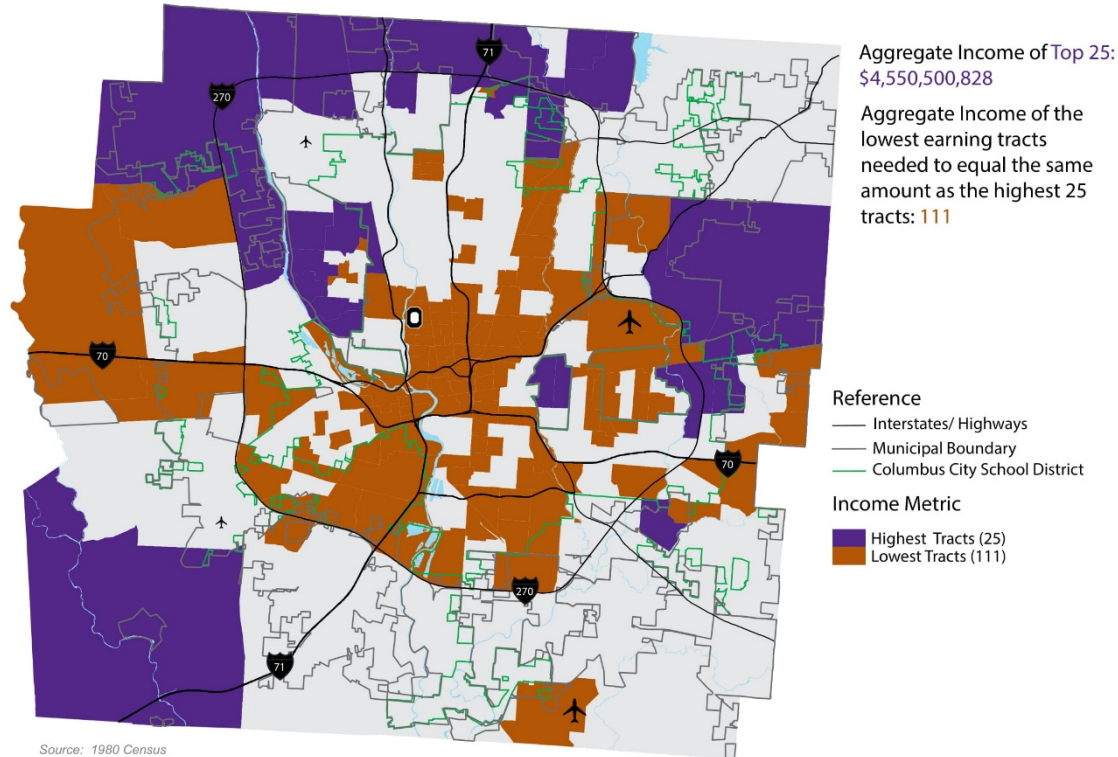
Franklin County Poverty Category Changes 1980 vs 2016



- This map illustrates the suburbanization of poverty
- Many core urban neighborhoods (except those which have gentrified) have not seen improvements in poverty rates
- Gentrification has led to reductions in poverty rates in the urban core

INCOME INEQUALITY: 1980

1980 Income Inequality Metric



Source: 1980 Census

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

- The highest earning tracts are located in independent suburbs or peripheral Columbus
- Jurisdictional boundaries (including municipal and school district) matter
- The aggregate income of the 25 highest earning tracts = \$4.5 billion, 111 of the lowest earning tracts earned an equivalent income

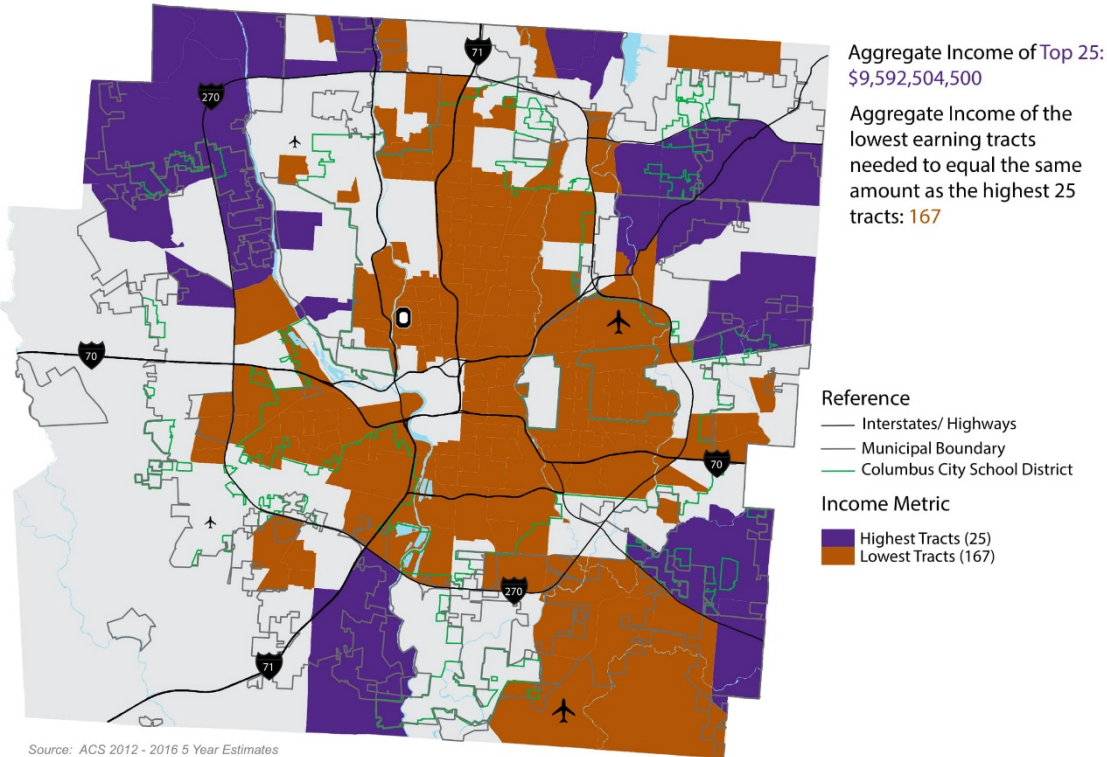


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INCOME INEQUALITY: 2016

2016 Income Inequality Metric



Source: ACS 2012 - 2016 5 Year Estimates

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

- This map highlights growing income inequality
- This map illustrates areas which will likely see a decrease in services (areas that continue to decline loose tax-base to fund services)
- The aggregate income of the 25 highest earning tracts = \$9.6 billion, 167 of the lowest earning tracts earned an equivalent income

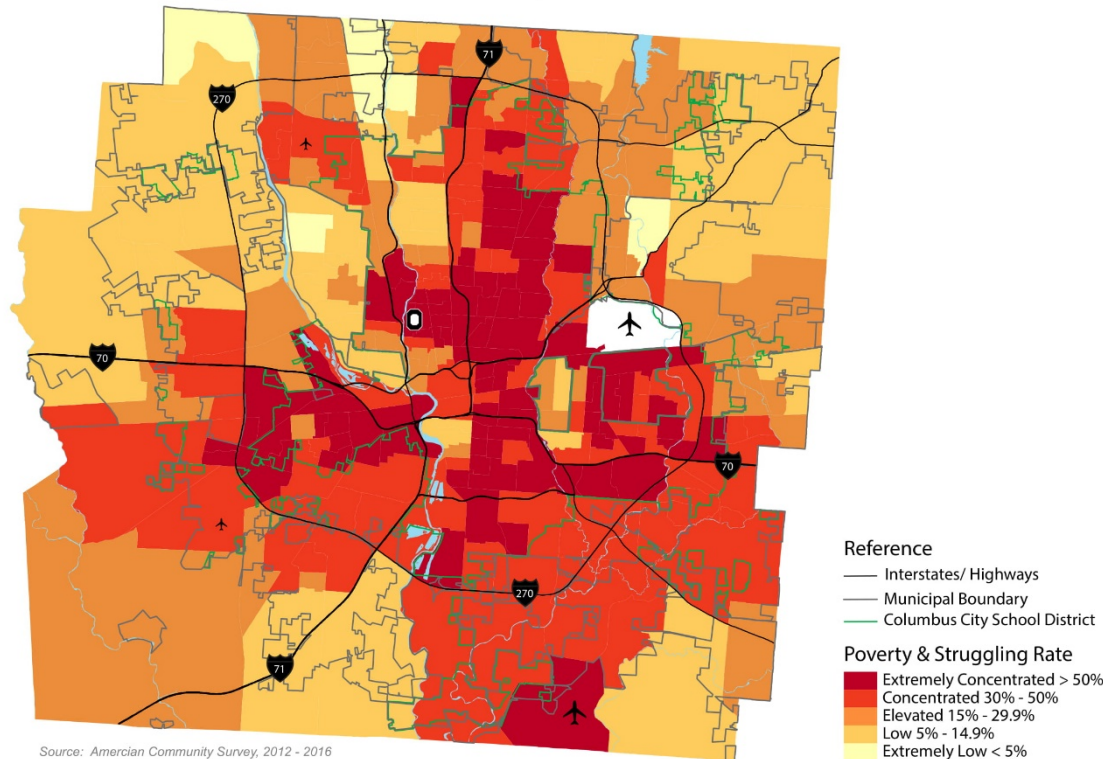


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POVERTY AT 200% FOR 2016

Franklin County Percent 200% Poverty Line and Below



Source: American Community Survey, 2012 - 2016

**School District and Municipal Boundaries are approximate for legibility reasons

- Families earning between 100-200% of the federal boundaries lines often qualify for services (for example, SNAP, WIC, Medicaid, and most food panties, among others)
- Jurisdictional boundaries matter – however, even within suburban jurisdictions, people are struggling
- There are very few tracts where people are not struggling in Franklin County
- This map illustrates the suburbanization of poverty

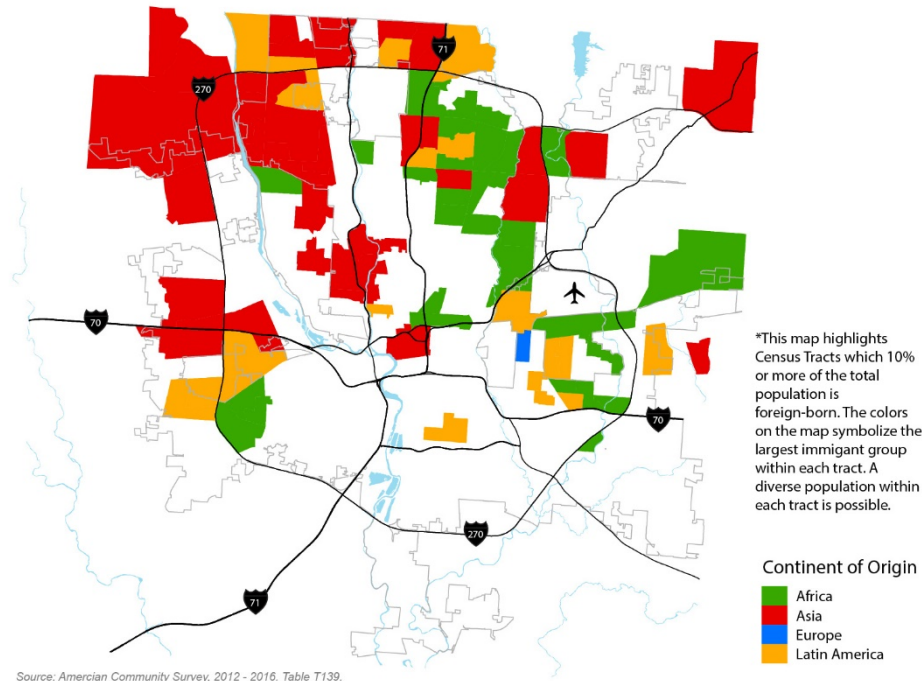


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FRANKLIN COUNTY IMMIGRATION

Franklin County 2016 Foreign-Born Population Clusters



- This map illustrates Franklin County's immigrant population by continent of origin
- Franklin County's immigrant population is concentrated in suburban spaces, with some exceptions
- There is a good deal of diversity (socioeconomic, racial, ethnic, etc.) between different immigrant populations
- Asian and African countries represent the largest immigrant populations



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WEALTH



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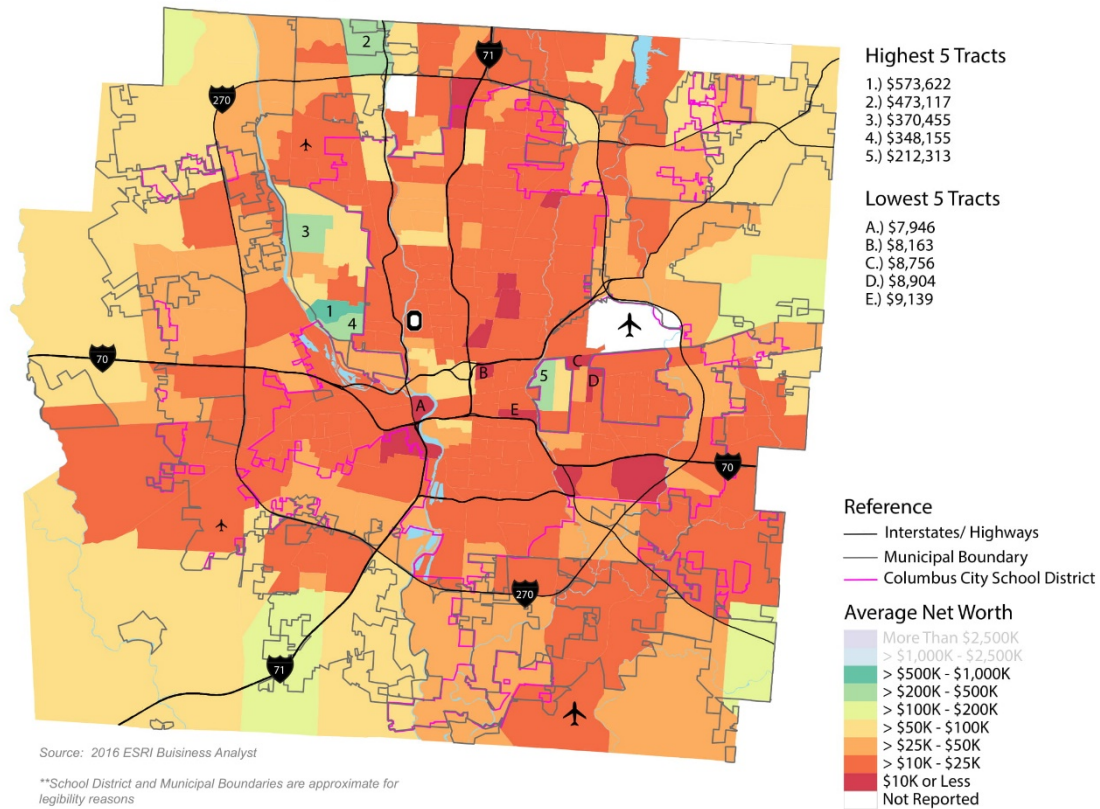
WEALTH

- The following maps illustrate wealth by age cohort in Franklin County
- Warmer colors (reds, oranges, and yellows) indicate lower net worth values while cool colors (blues and greens) indicate higher net worth values
- Net worth is defined as the value of all the non-financial and financial assets owned by an individual minus the value of all liabilities
- Wealth tends to increase as we age
- Pay attention to areas where wealth is concentrated and where it is not across age cohorts

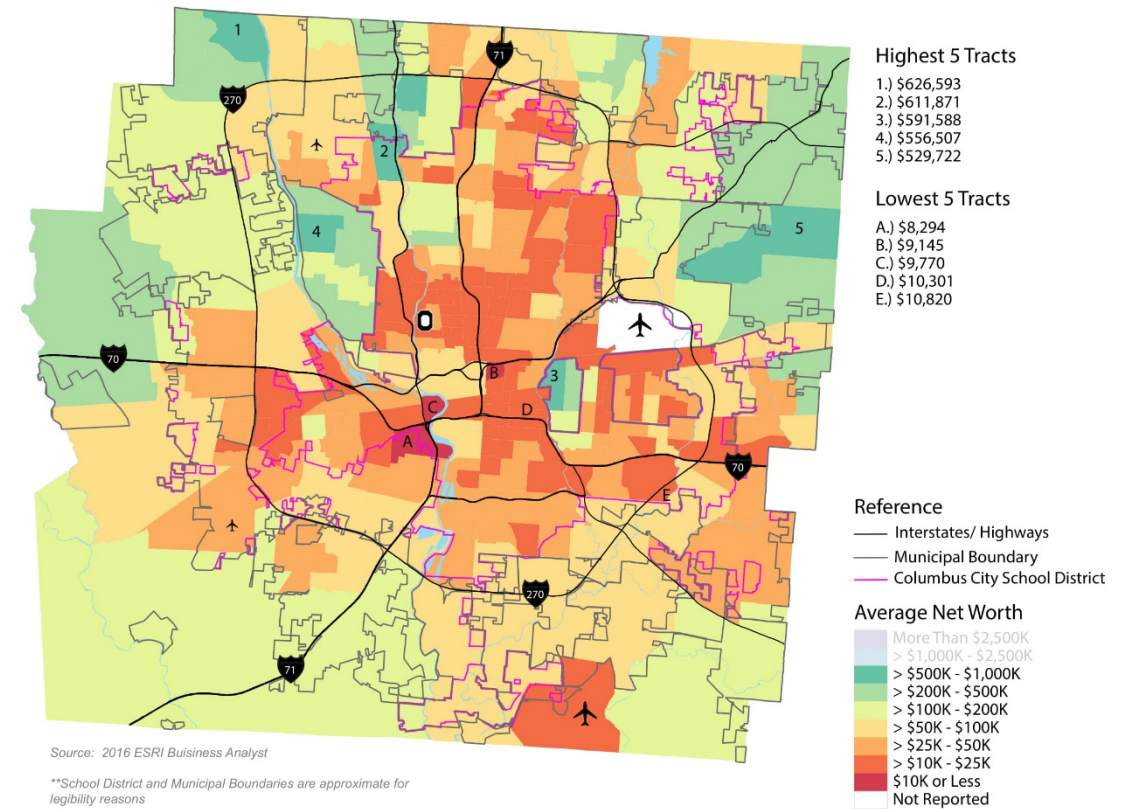


WEALTH

Franklin County Average Net Worth of 15 to 24 Year Olds in 2016

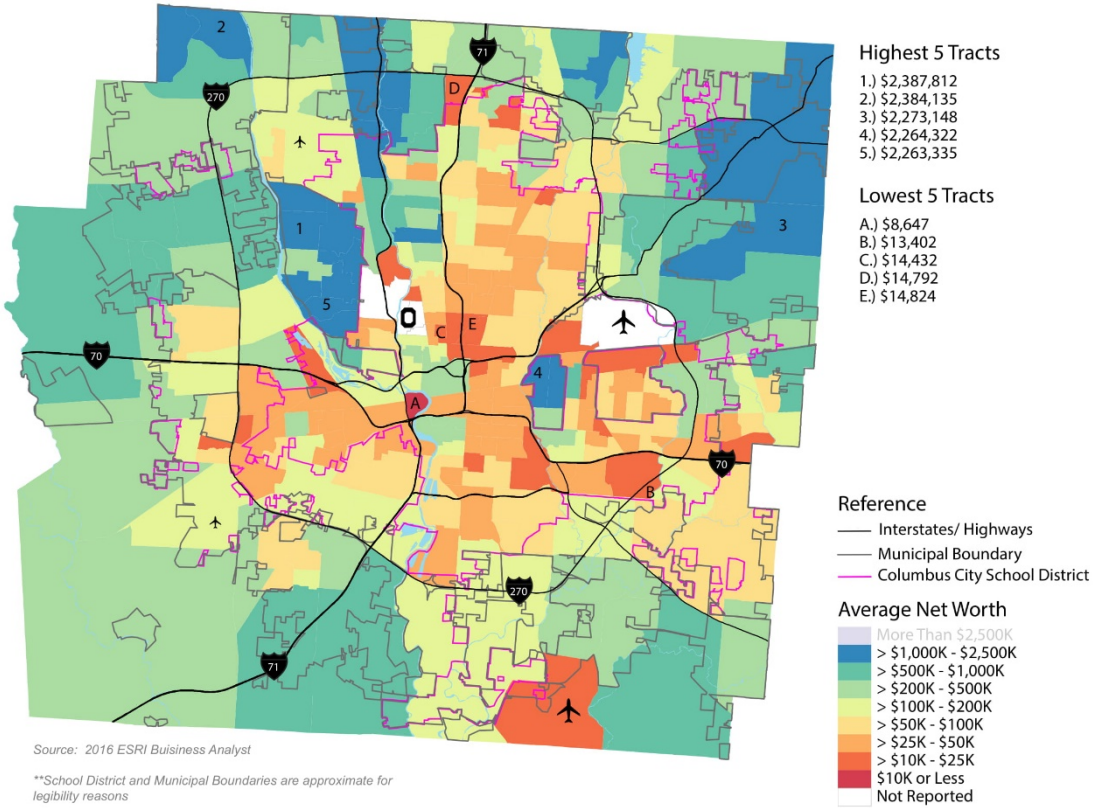


Franklin County Average Net Worth of 25 to 34 Year Olds in 2016

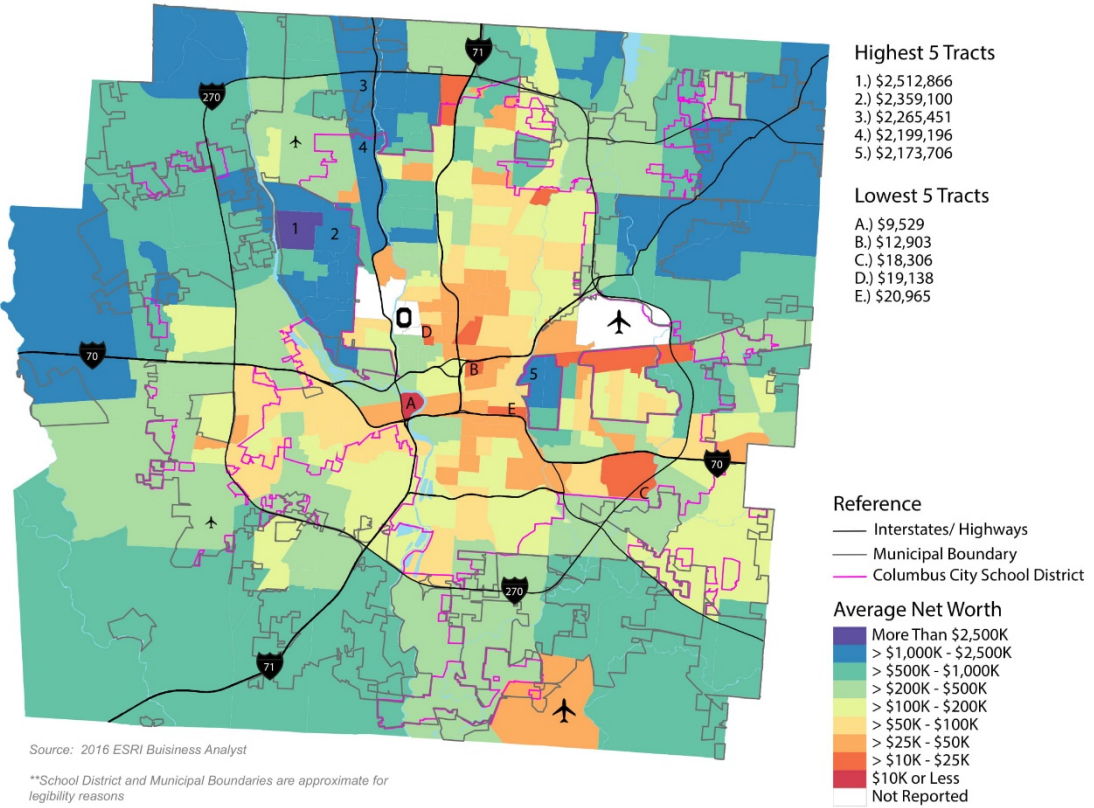


WEALTH

Franklin County Average Net Worth of 35 to 44 Year Olds in 2016

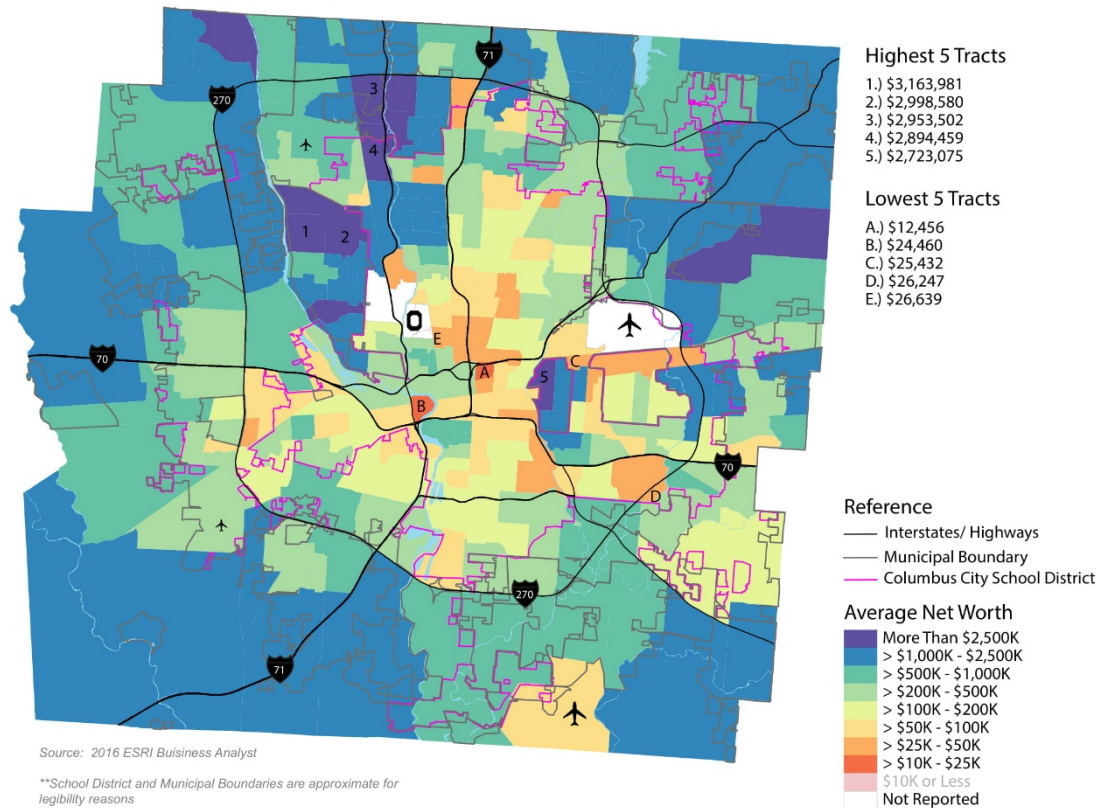


Franklin County Average Net Worth of 45 to 54 Year Olds in 2016

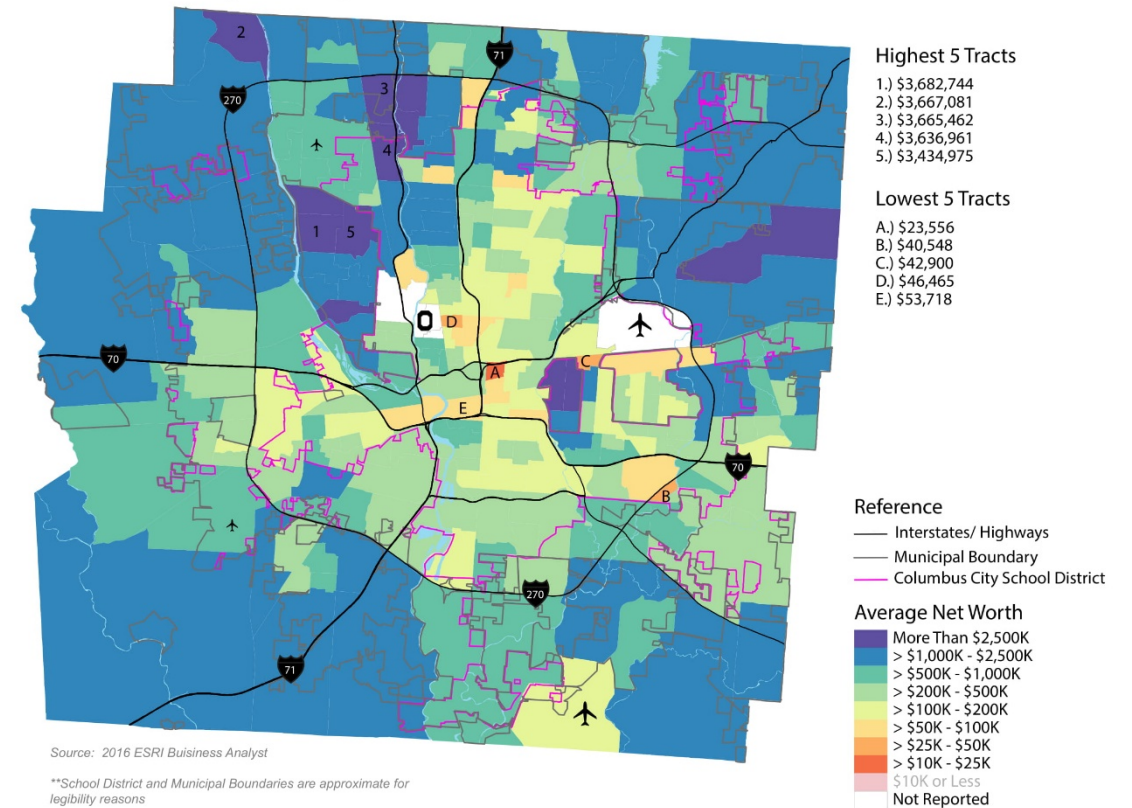


WEALTH

Franklin County Average Net Worth of 55 to 64 Year Olds in 2016

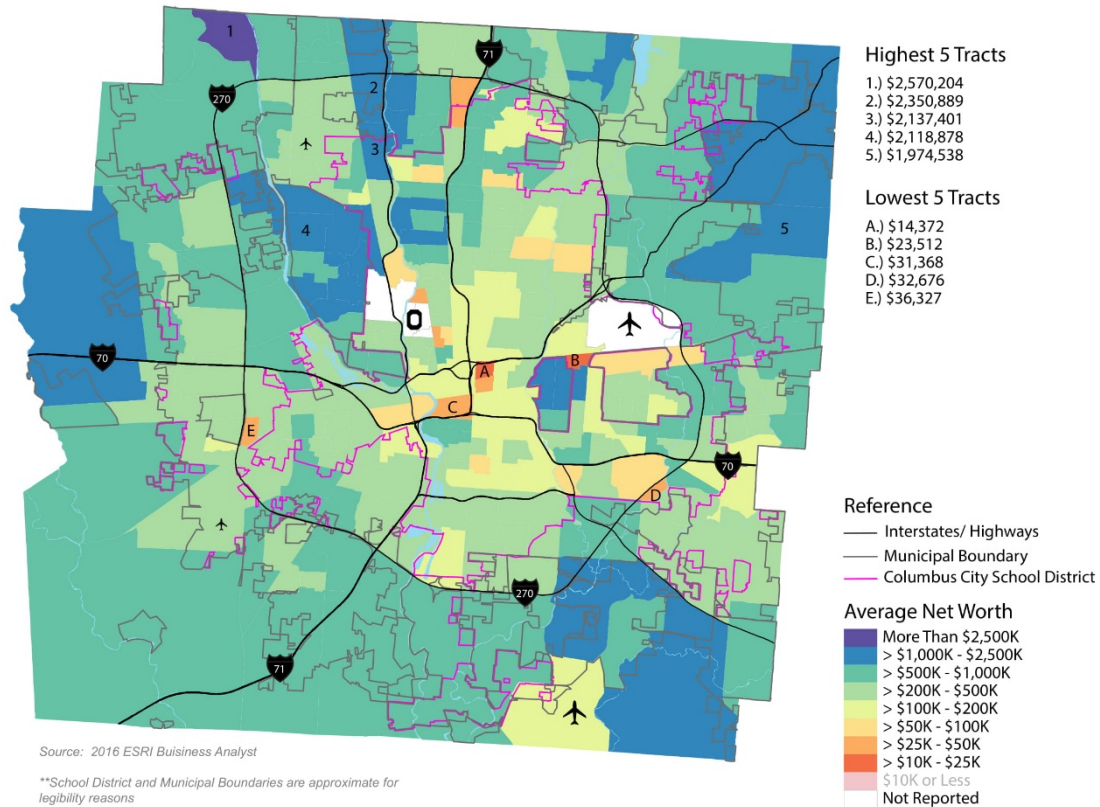


Franklin County Average Net Worth of 65 to 74 Year Olds in 2016



WEALTH

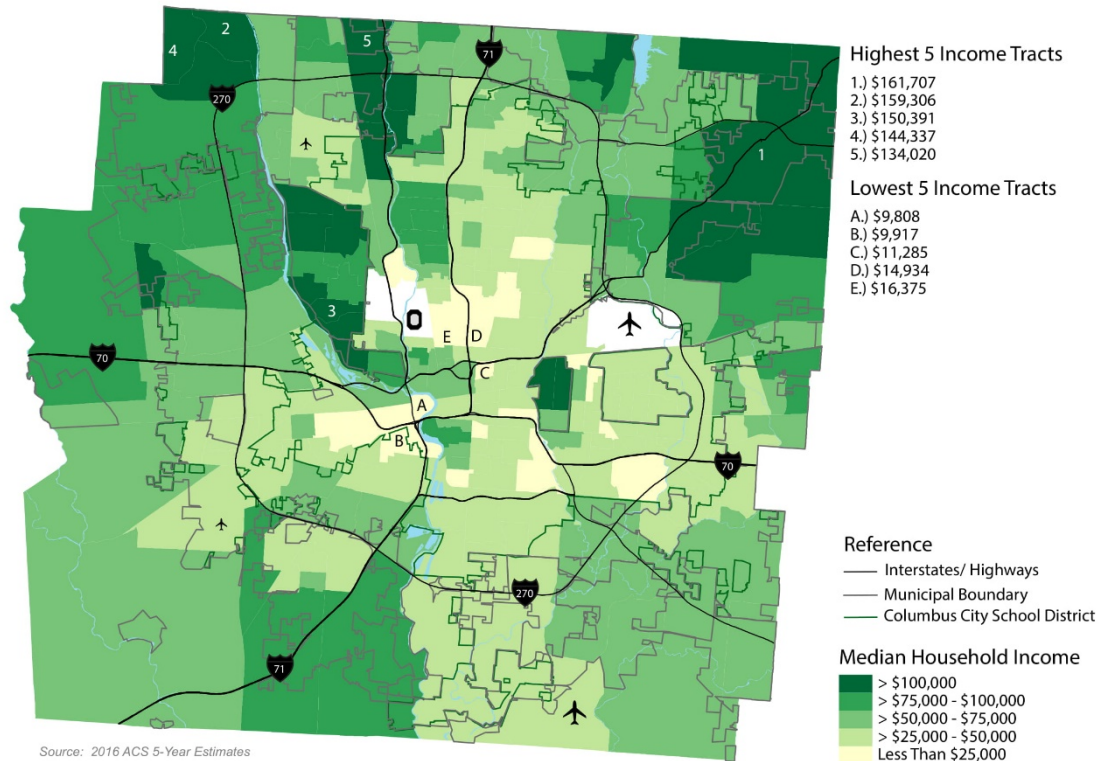
Franklin County Average Net Worth of 75+ Year Olds in 2016



- Accumulation and transfer of wealth is critical to ending generational poverty
- The locations of the census tracts with lowest median wealth remains consistent throughout the lifespan and are associated with clusters of minorities
- Our starting points in life matter and influence lifetime wealth accumulation
 - The census tract with the highest of median wealth for 15-24 year olds holds **72 times** the amount of wealth than the census tracts with the lowest median wealth
 - The census tract with the highest median wealth for 55-64 year olds holds **254 times** the amount of wealth than the census tract with the lowest median wealth
 - The census tract with the highest median wealth for those over 75 holds **178 times** the amount of wealth than the census tract with the lowest median wealth

MEDIAN HOUSEHOLD INCOME

2016 Median Household Income



Source: 2016 ACS 5-Year Estimates

**School District and Municipal Boundaries are approximate for legibility reasons

- Income disparities are associated with wealth disparities
- The census tract with the highest median household income **16 times** the median household income of the census tract with the lowest median household income
- Wealth disparities are more significant structural drivers of poverty than income disparities
- Gentrification is influencing incomes in the urban core



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PUBLIC ASSISTANCE

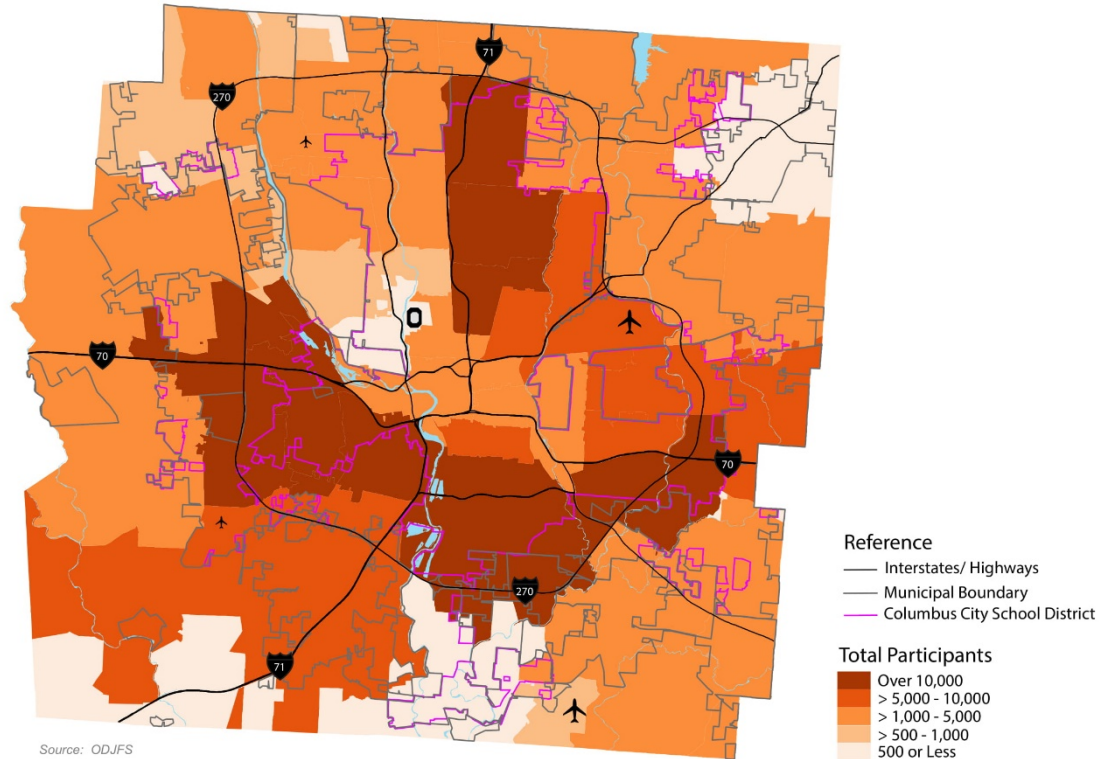


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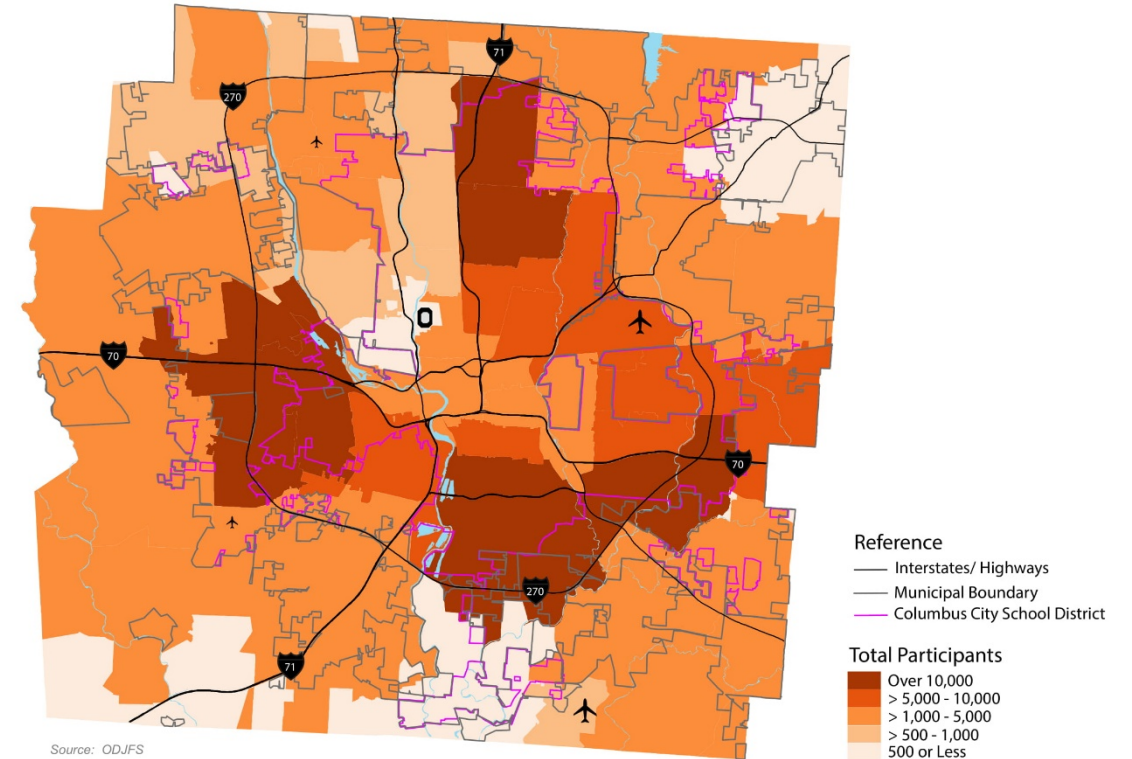
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SNAP USAGE

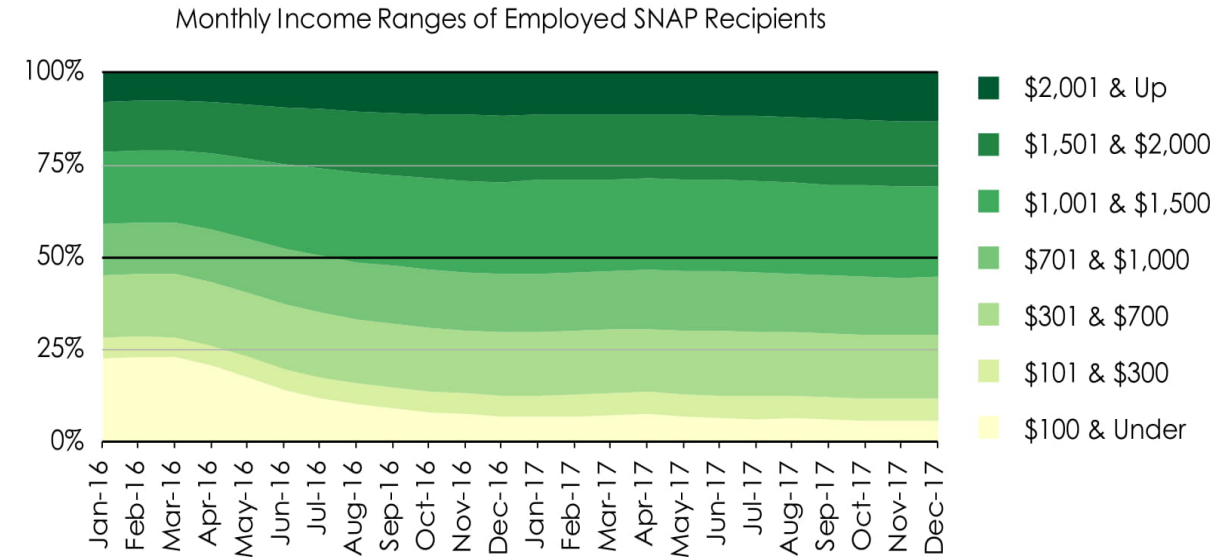
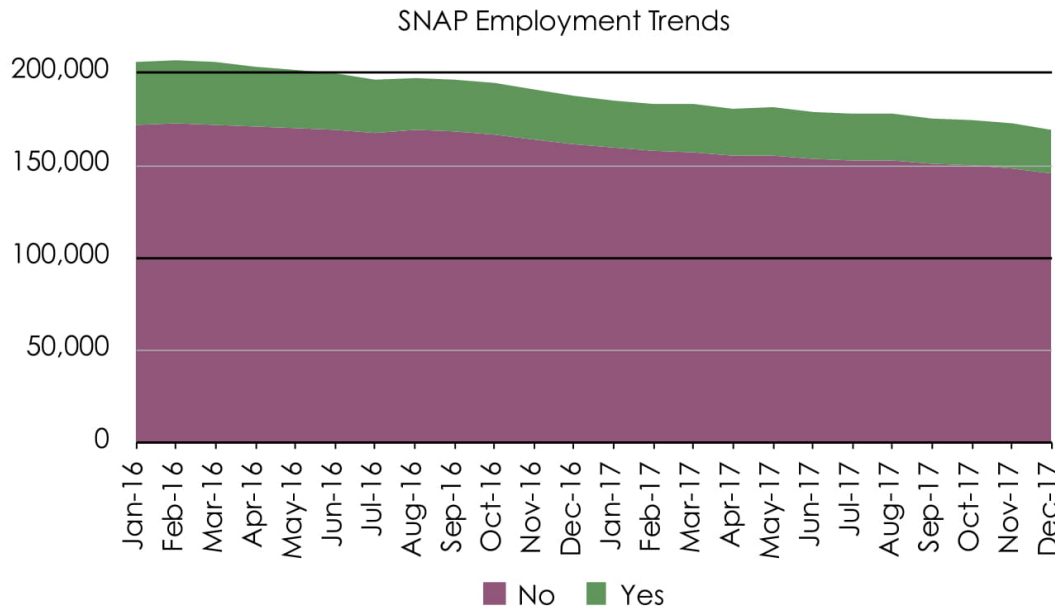
2016 Calendar Year Average Monthly Total SNAP Recipients by ZIP Code



2017 Calendar Year Average Monthly Total SNAP Recipients by ZIP Code



SNAP EMPLOYMENT & INCOME TRENDS

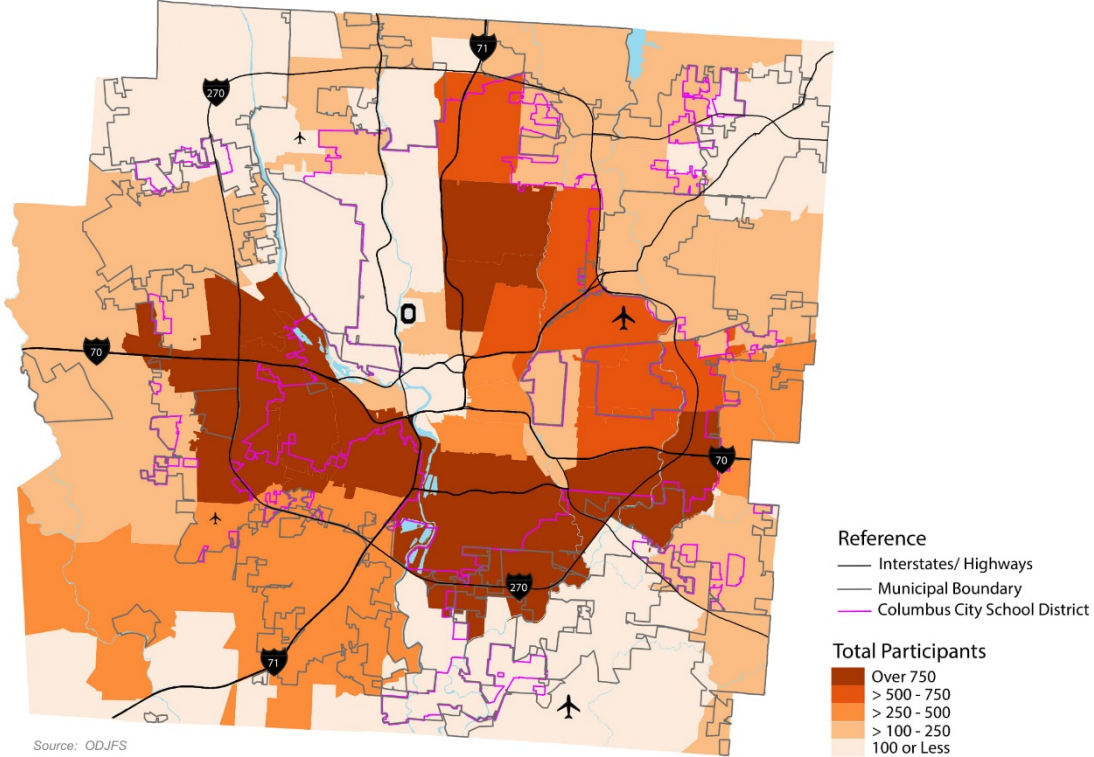


- Steady Drop of Recipients
- Work Rate Constant
- Lowest Incomes Dropping
- Leveling Off of Income



TANF USAGE

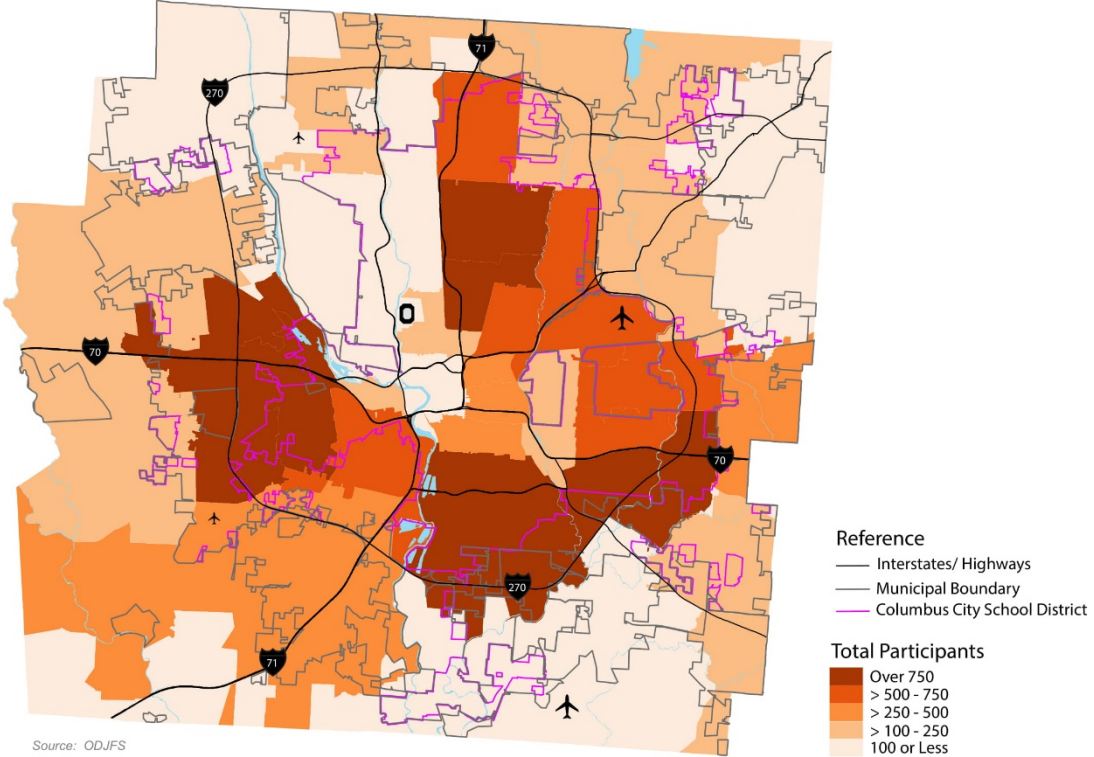
2016 Calendar Year Average Monthly Total TANF Recipients by ZIP Code



Source: ODJFS

**School District and Municipal Boundaries are approximate for legibility reasons

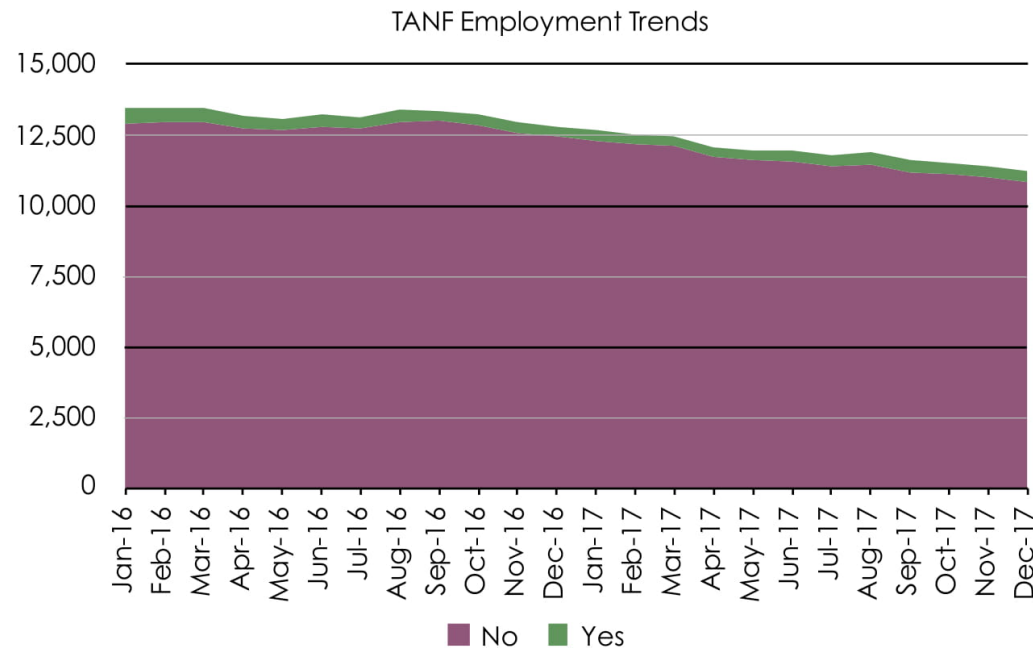
2017 Calendar Year Average Monthly Total TANF Recipients by ZIP Code



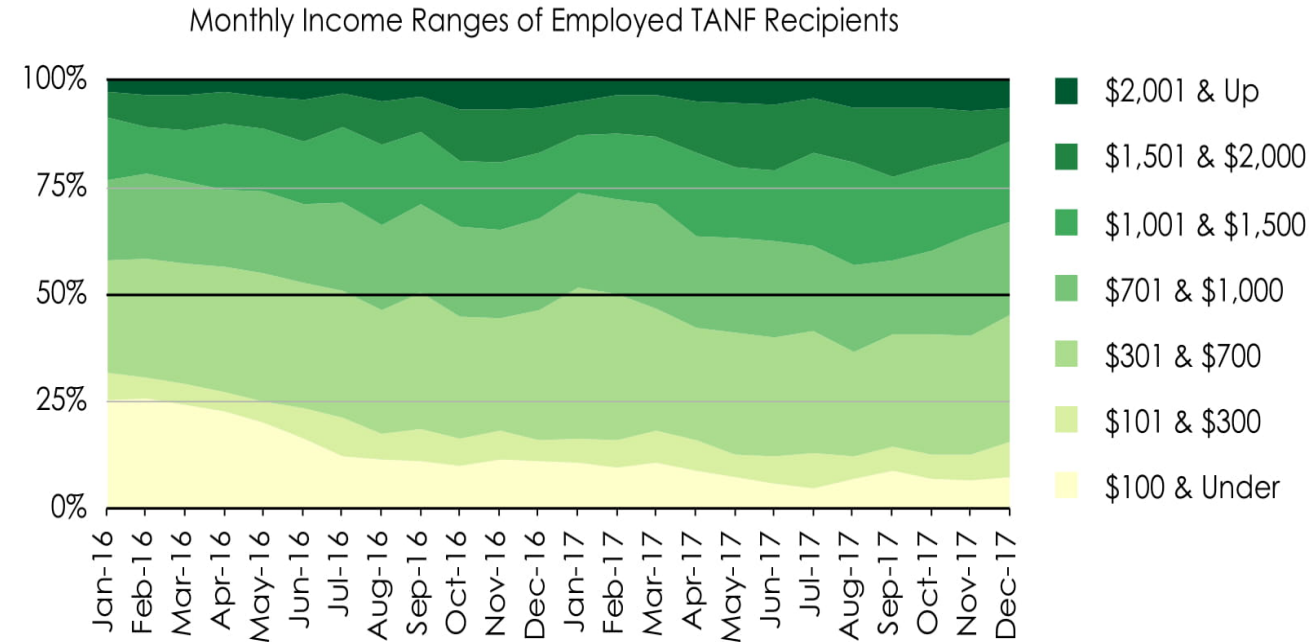
Source: ODJFS

**School District and Municipal Boundaries are approximate for legibility reasons

TANF EMPLOYMENT & INCOME TRENDS



- Less Recipients
- Work Rate Constant



- Lowest Incomes Dropping
- Leveling Off of Income



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EMPLOYMENT



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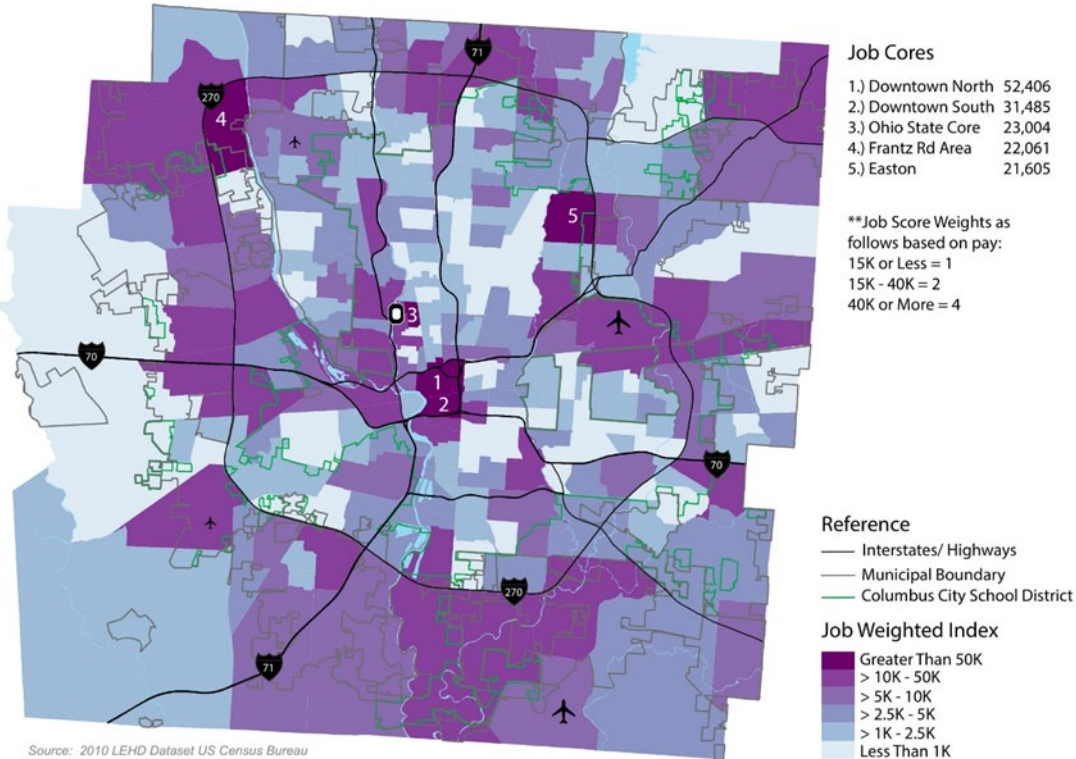
WEIGHTED JOBS INDEX AND UNEMPLOYMENT

- The weighted jobs indices take into account both quantity and quality of jobs by measuring and weighting density and wages
- Places with darker colors tend to have more jobs that are higher paying
- Pay attention to changes in the job cores between 2010 and 2015
- The unemployment map illustrates the unemployment rates in Franklin County
- Darker colors indicate higher rates of unemployment
- Areas with high unemployment tend to overlap with areas of low job availability



JOB LOCATIONS

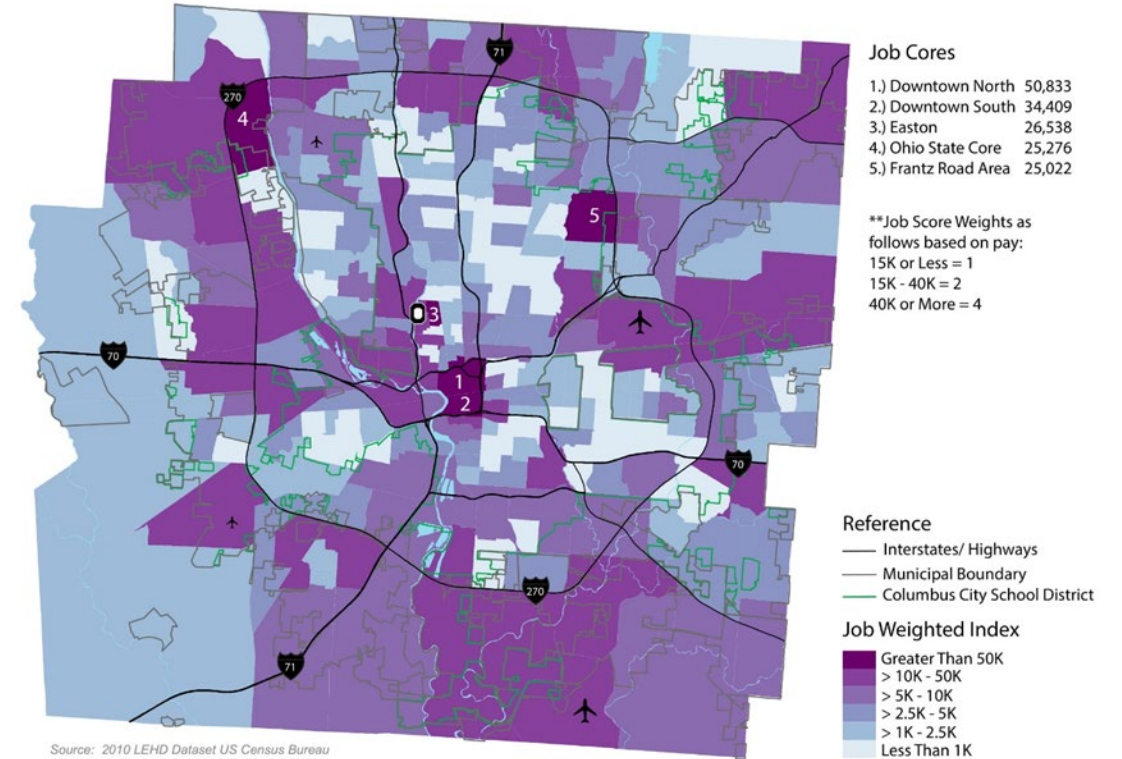
2010 Weighted Jobs Index



Source: 2010 LEHD Dataset US Census Bureau

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

2015 Weighted Jobs Index



Source: 2010 LEHD Dataset US Census Bureau

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

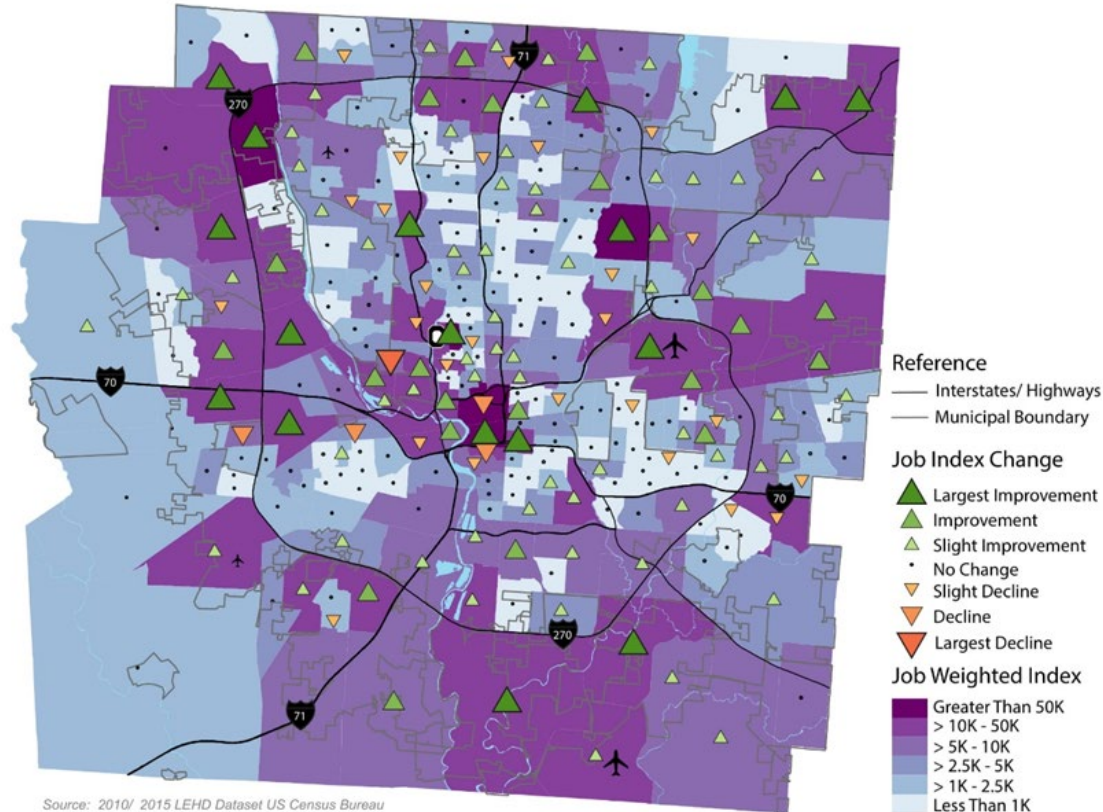


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JOB LOCATIONS AND UNEMPLOYMENT

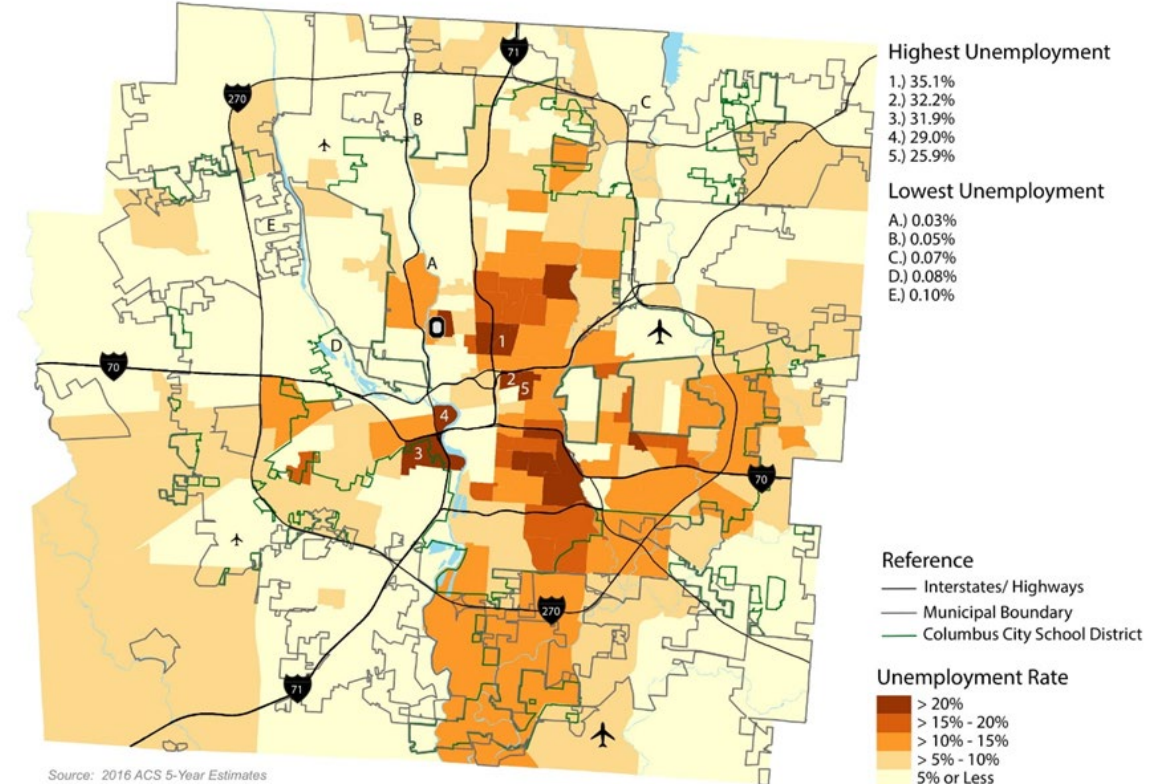
2010 vs 2015 Weighted Jobs Index Change



Source: 2010/ 2015 LEHD Dataset US Census Bureau

**School District and Municipal Boundaries are approximate and based off of 2016 boundaries for legibility and orientation reasons.

2016 Unemployment Rate



Source: 2016 ACS 5-Year Estimates

**School District and Municipal Boundaries are approximate for legibility reasons

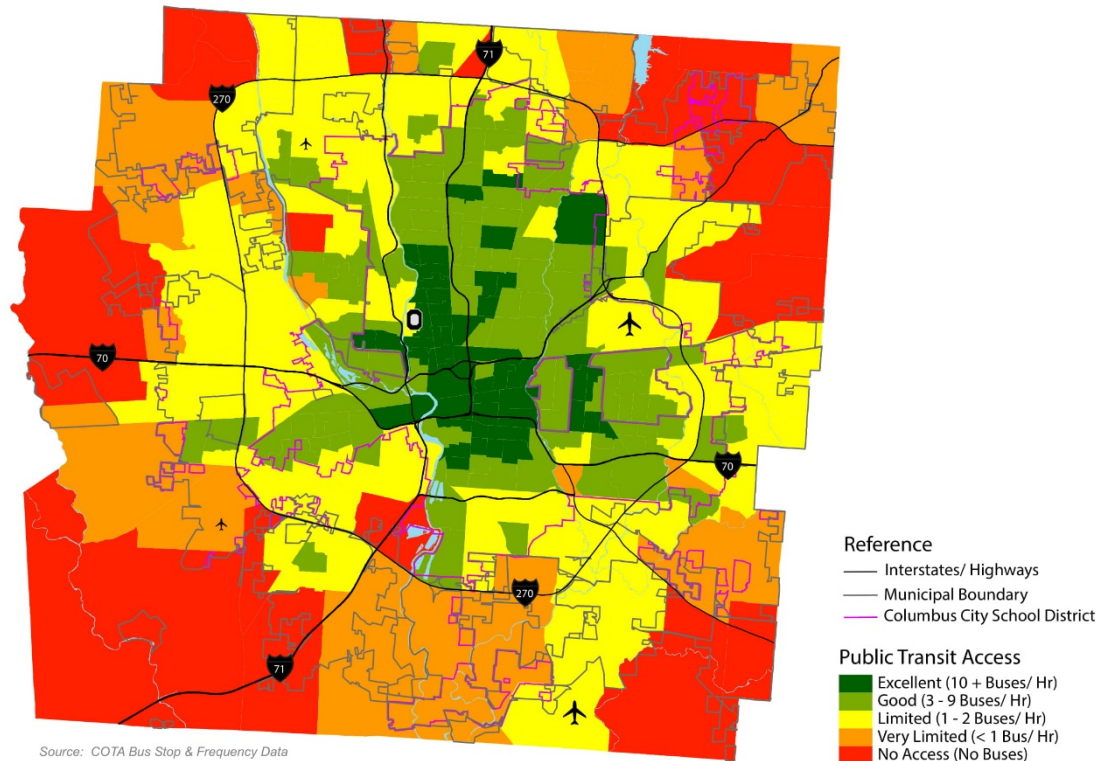
JOB LOCATIONS AND UNEMPLOYMENT RATE

- Easton has experienced significant growth between 2010 and 2015
- The areas that lack jobs have been consistent between 2010 and 2015
- The lowest unemployment rate is 0.03% (Clintonville) while the highest is 35.1% (South Linden) and the national average was 4.8% in 2016
- There are differing reasons why areas experience no change in jobs
 - Land use policy (example: Upper Arlington)
 - Disinvestment (example: Cleveland Avenue Corridor, Hilltop, South Side, James Road area)
- Areas that have no change and score poorly on the jobs index also have high rates of unemployment



PUBLIC TRANSIT

Public Transit Index



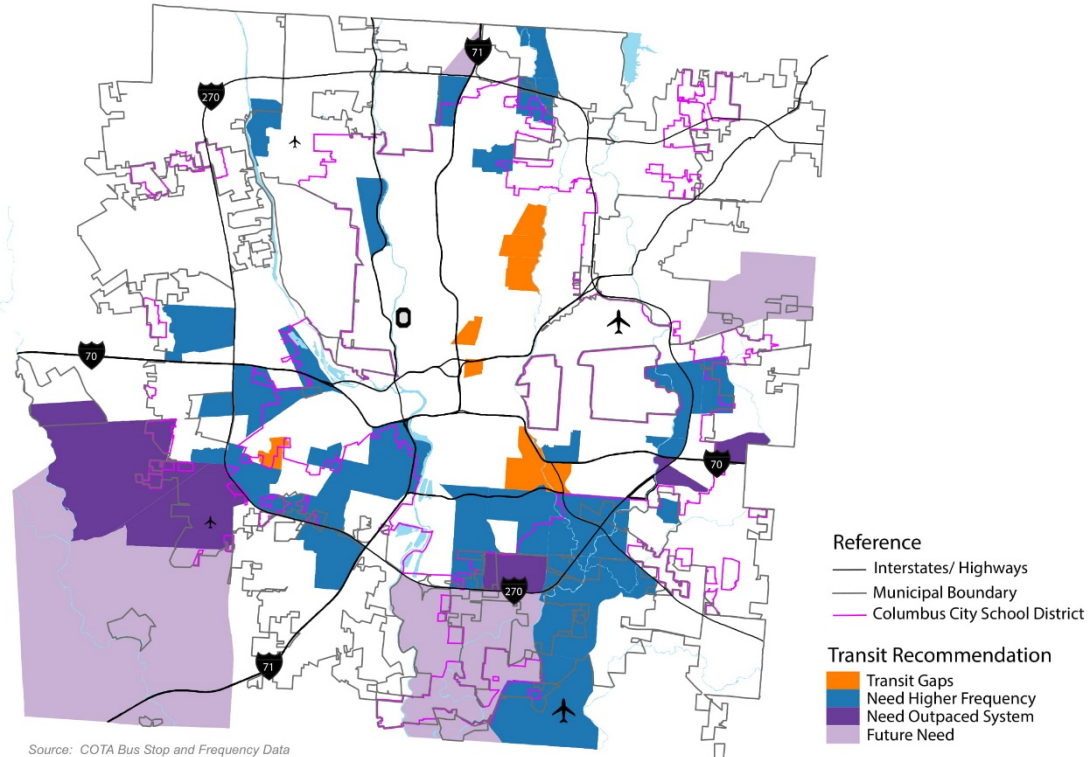
Source: COTA Bus Stop & Frequency Data

**School District and Municipal Boundaries are approximate for legibility reasons

- This index takes into account transit frequency and the percentage of each tract within a quarter mile of each bus stop and measures relative public transit access
- Transit access is best within the core of the city and worst in the periphery
- The Hilltop neighborhood has less frequency compared to other urban neighborhoods
 - The Hilltop has been experiencing increasing poverty over the past 10 years and transit access has not kept up
- There is a mismatch between transit access and job access
- Generally, the growth of jobs are occurring in areas with poor public transit access (with the exception of Easton and the urban core)

TRANSIT RECOMMENDATIONS

Recommendations for Public Transit Improvements



Source: COTA Bus Stop and Frequency Data

**School District and Municipal Boundaries are approximate for legibility reasons

- The orange areas represent places where transit services exist but don't reach all areas of need within the census tract
- Blue areas represent places where the growth in poverty has outpaced the frequency of the transit system and could benefit from increased route frequency
- The darker purple places represent areas where poverty has grown outside of the existing transit network and could benefit from network expansion
- The light purple areas are currently experiencing growth in poverty, though the current rates are not exceedingly high; These areas may benefit from future network expansion



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HOUSING

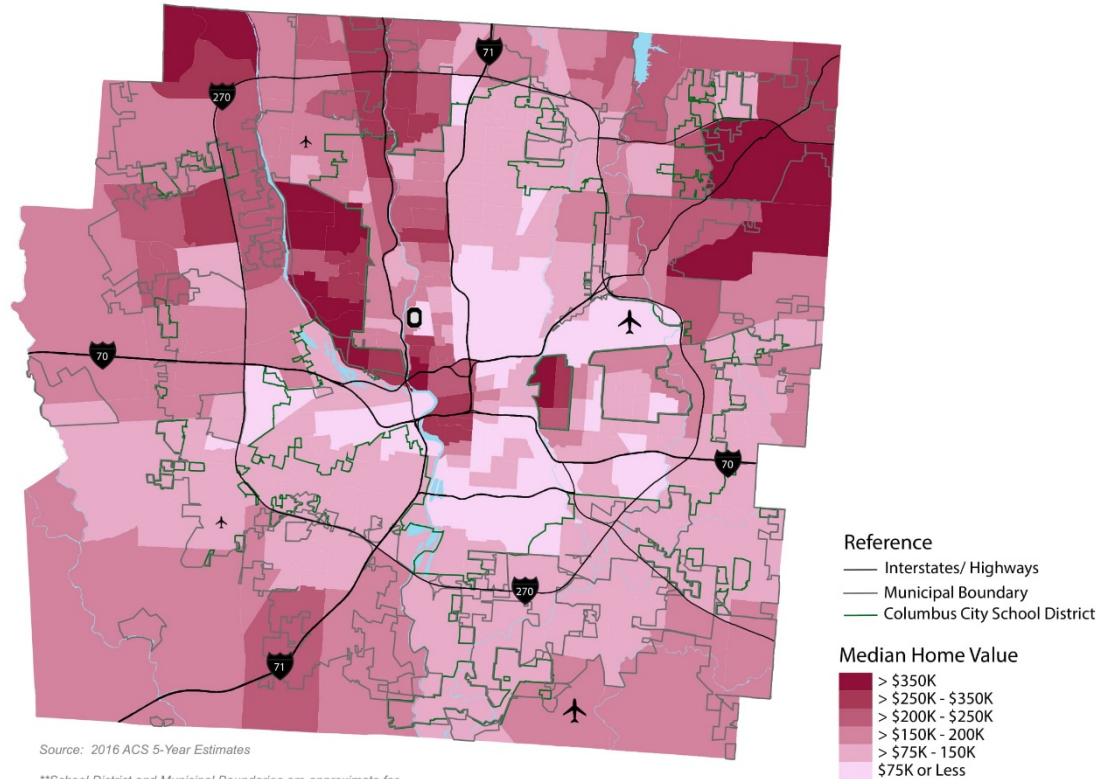


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HOUSING: MEDIAN HOME VALUE

2016 Median Home Value



Source: 2016 ACS 5-Year Estimates

**School District and Municipal Boundaries are approximate for legibility reasons

- Home values are associated with wealth
- Jurisdictional boundaries matter
- Home values are highly associated with race and concentrated poverty

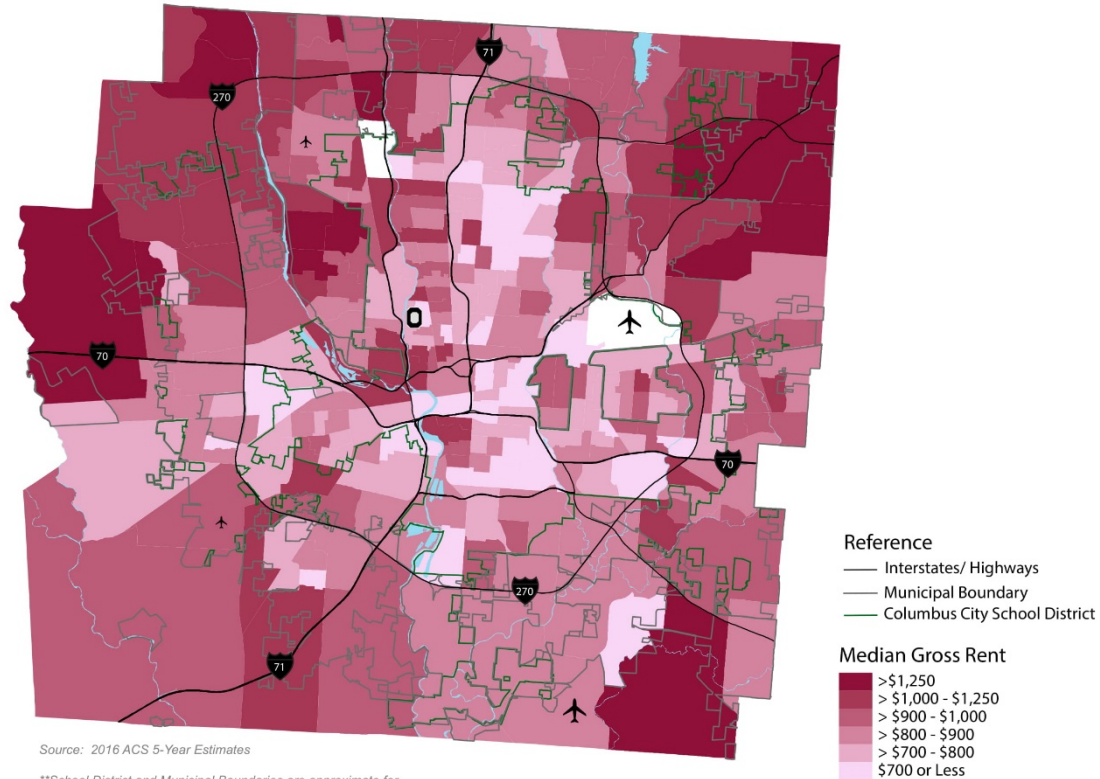


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HOUSING: MEDIAN GROSS RENT

2016 Median Gross Rent



Source: 2016 ACS 5-Year Estimates

**School District and Municipal Boundaries are approximate for legibility reasons

- Rents are highest in suburban and gentrified urban spaces
- The areas with the lowest median gross rents are concentrated in areas with high unemployment and high poverty

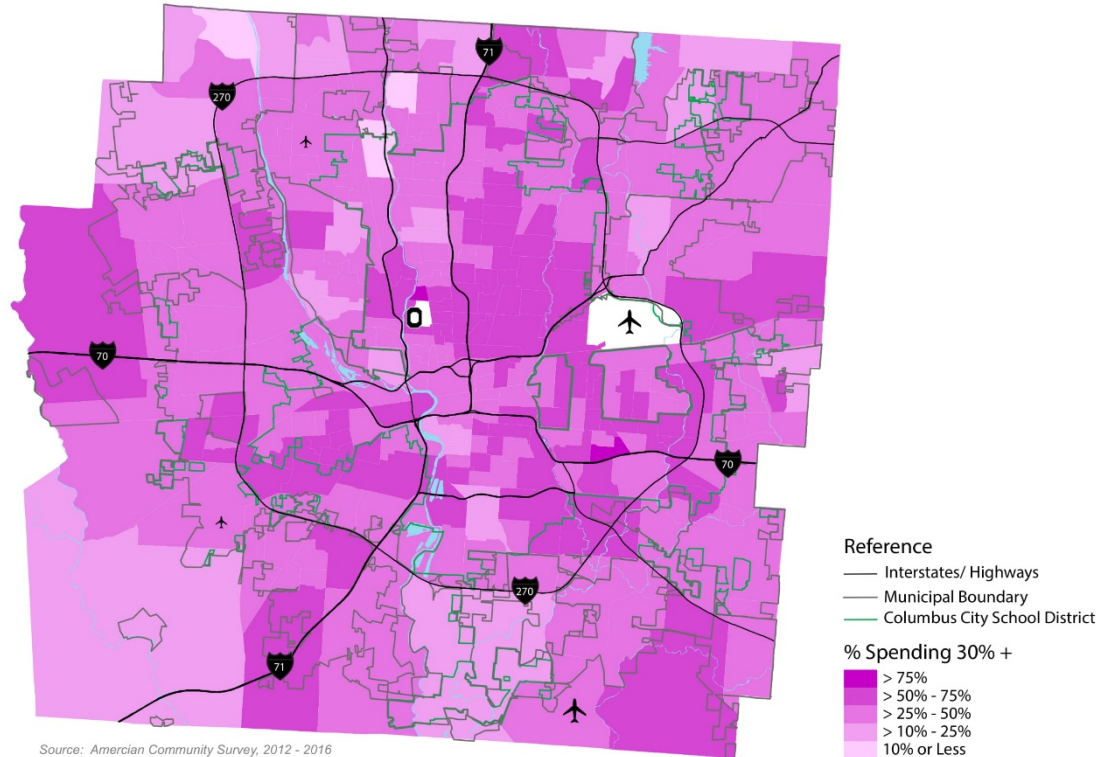


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HOUSING: RENTER COST-BURDEN

Percentage of Renters Cost-Burdened



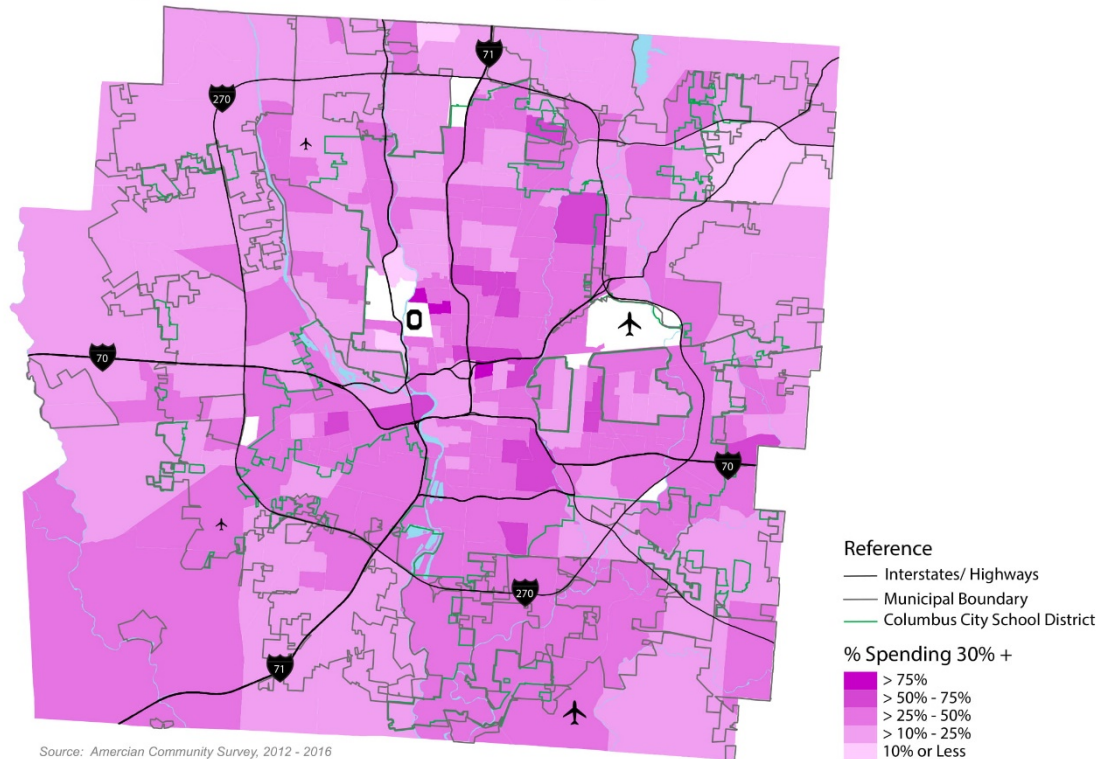
Source: American Community Survey, 2012 - 2016

**School District and Municipal Boundaries are approximate for legibility reasons

- Housing cost burden is when renters are paying 30% or more of their income on their housing expenses.
- Housing cost burden is a serious concern for Franklin County renters
 - There are very few places where less than 25% of the renting population is not cost burden
 - There were 99,842 (43.8%) households that were cost burdened in 2016 – nearly half of all renters in Franklin County were burdened in 2016

HOUSING: COST-BURDENED OWNERS WITH MORTGAGES

Percentage of Homeowners With Mortgage Cost-Burdened



Source: American Community Survey, 2012 - 2016

**School District and Municipal Boundaries are approximate for legibility reasons

- Areas with higher wealth have lower rates of cost-burdened owners with mortgages in general
 - Cost-burden owners with mortgages also associate with low income tracts
- The overall cost-burden rates for owners with mortgages is lower than the overall cost-burden rates for renters
- There are 47,482 (24.6%) households that were cost burdened in 2016

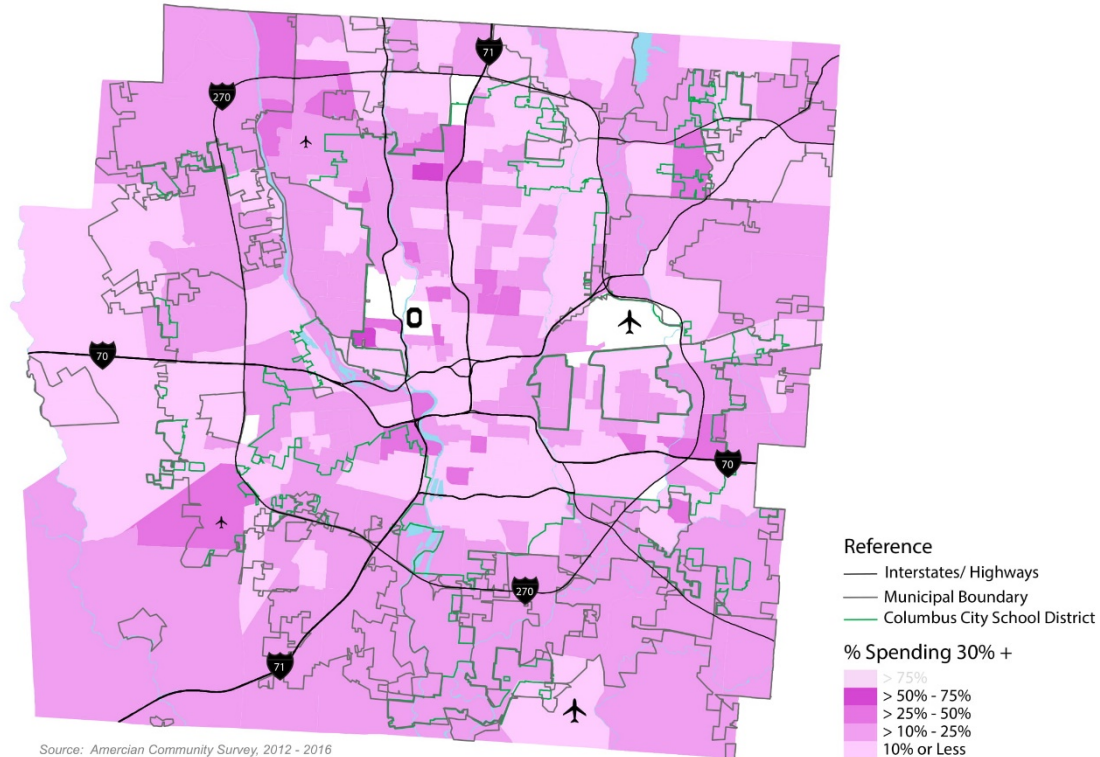


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HOUSING: COST-BURDENED OWNERS WITHOUT MORTGAGES

Percentage of Homeowners Without Mortgage Cost-Burdened



Source: American Community Survey, 2012 - 2016

**School District and Municipal Boundaries are approximate for legibility reasons

- The cost-burden rate for owners without a mortgage is lower than the cost-burden rate for owners with mortgages
- This is the only category of cost-burden where no tracts exhibit rates exceeding 75%
- There were 8,688 (12.8%) households that were cost burdened in 2016

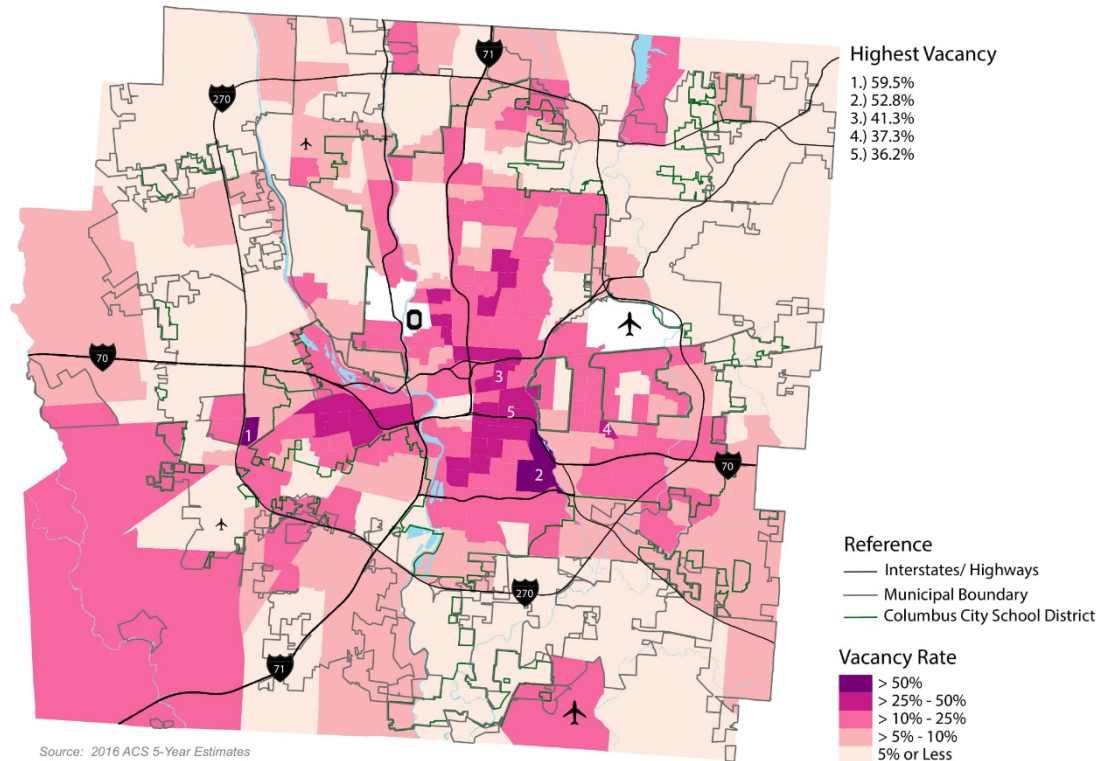


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HOUSING: VACANCY

2016 Housing Unit Vacancy Rate



Source: 2016 ACS 5-Year Estimates

**School District and Municipal Boundaries are approximate for legibility reasons

- The areas with the highest vacancy rates are areas exhibiting the highest concentrated poverty rates
- These same areas also tend to have older housing stocks that have experienced years of disinvestment
- Old and blighted apartment complexes drive up vacancy rates
- Tracts with the highest vacancy rates are minority neighborhoods
- Areas with low vacancy rates will likely see increasing rents and home values

HEALTH

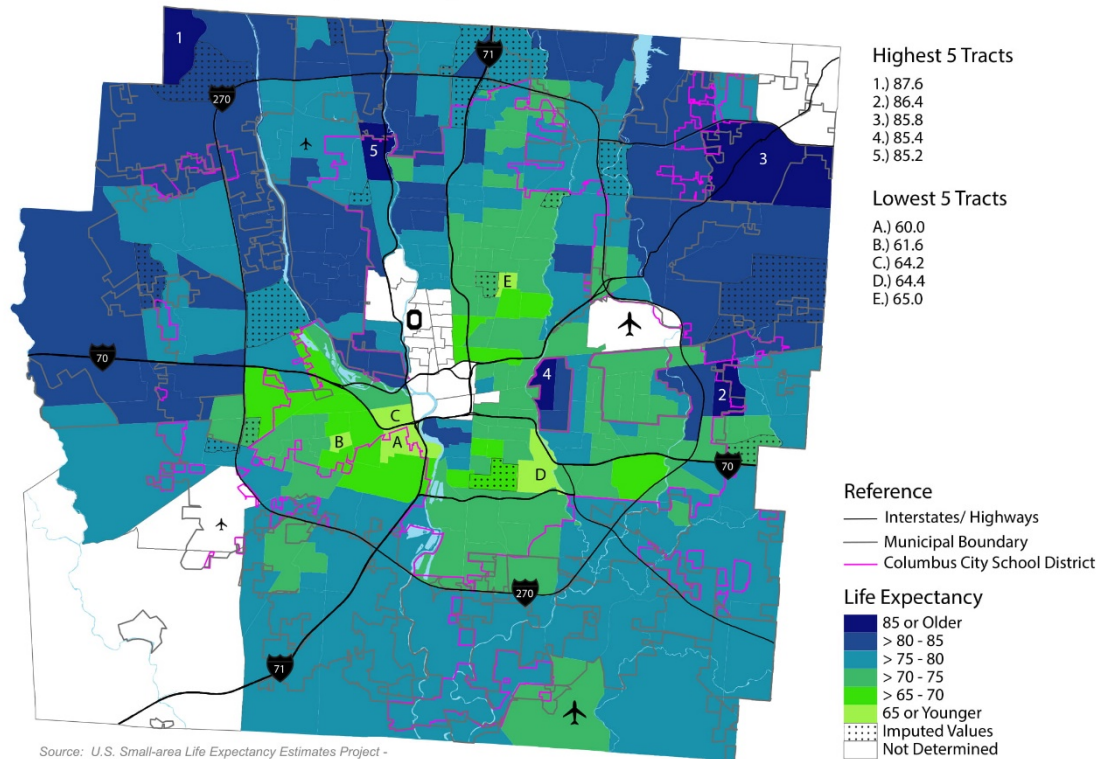


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LIFE EXPECTANCY

Franklin County Life Expectancy



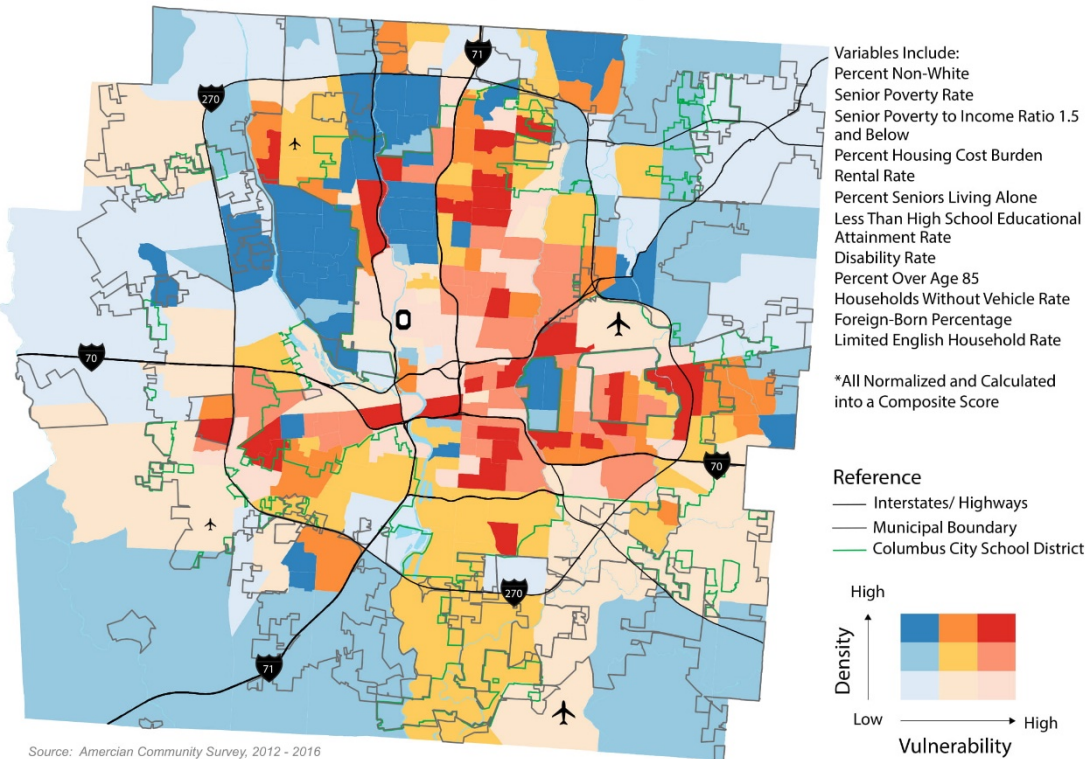
Source: U.S. Small-area Life Expectancy Estimates Project - 2010 - 2015 Averages

**School District and Municipal Boundaries are approximate for legibility reasons

- There is a 27.6 year gap in life expectancy by tract in Franklin County
- Areas with the lowest life expectancy rates follow the upside-down “t” pattern, a pattern that poverty and most indicators associated with poverty exhibit in Franklin County that follows the southern border of I70 and the east border of I71
- Life expectancy is generally higher in suburban spaces, particularly in the norther half of the county
- In Franklin County, approximately 125,000 people or 10.2% of the population does not have health insurance (compared to 8.5% of the State’s population)

SENIOR VULNERABILITY AND DENSITY

Franklin County Senior Vulnerability & Density Index in 2016



Source: American Community Survey, 2012 - 2016

**School District and Municipal Boundaries are approximate for legibility reasons

- Areas that are red and orange are areas with dense senior populations that are vulnerable
- Senior density does not follow any specific pattern, there are suburban and urban spaces with large senior populations
- Senior vulnerability does somewhat follow the upside-down “t” shape



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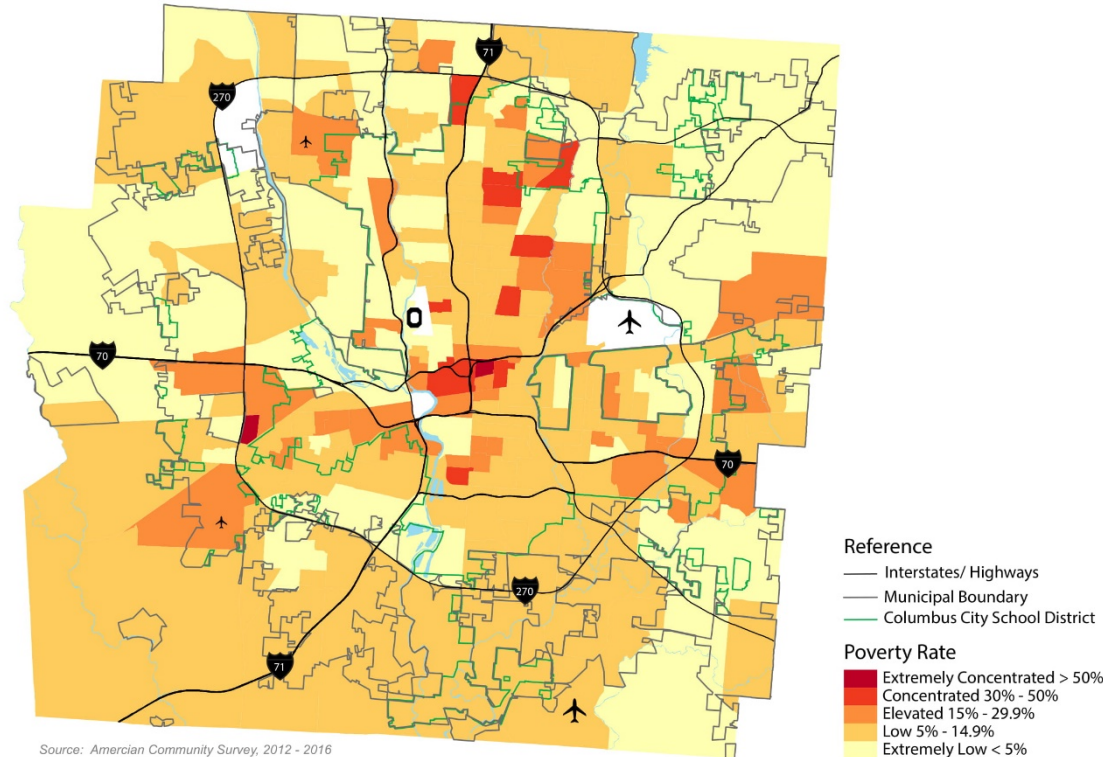
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For more information about the senior vulnerability and density index, visit:

<http://kirwaninstitute.osu.edu/wp-content/uploads/2015/03/ki-tcf-senior-study.pdf> 37

SENIOR POVERTY

Franklin County Poverty Rates For Those 65 and Over in 2016



Source: American Community Survey, 2012 - 2016

**School District and Municipal Boundaries are approximate for legibility reasons

- Concentrated senior poverty is very pocketed throughout Franklin County
- There are not many areas of concentrated poverty in suburban jurisdictions
- Places that have high net wealth have low senior poverty rates
- Areas of concentrated senior poverty align with areas of concentrated poverty in the general poverty map



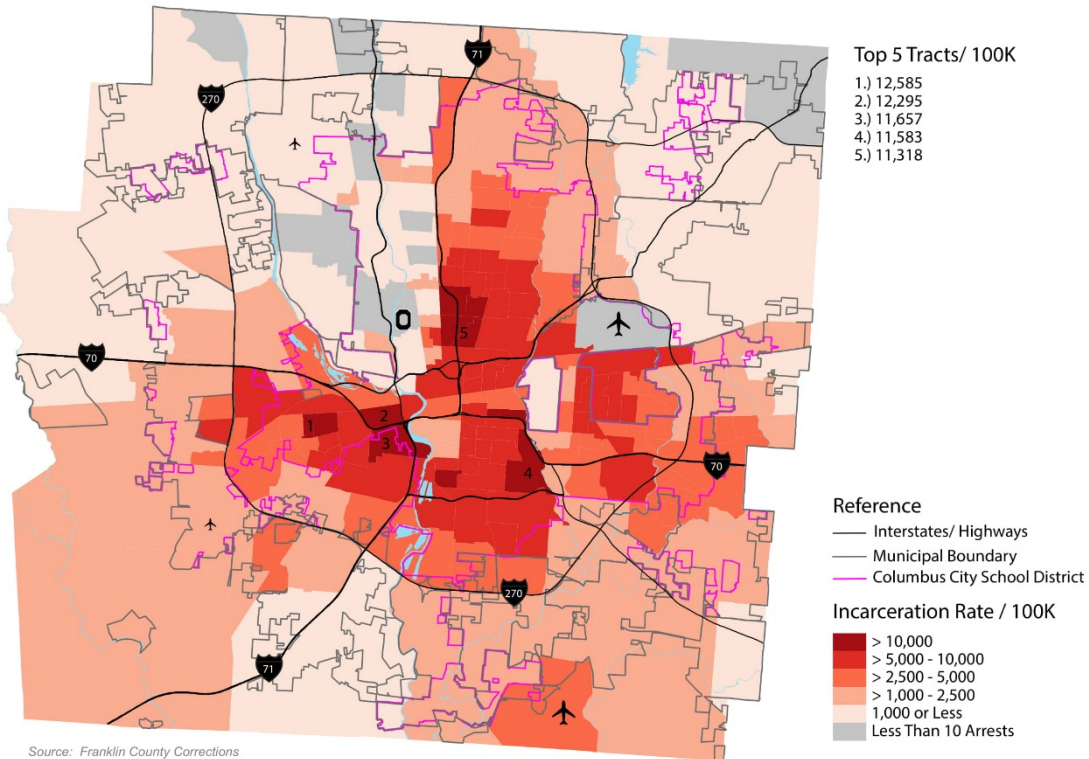
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HEALTH: INCARCERATION

INCARCERATION IS TRAUMATIC FOR FAMILIES, BREAKING UP HOUSEHOLDS, AND LOWERS LIFE EXPECTANCY OF THOSE INCARCERATED

Overall Incarceration Rate 2016 - 2017



Source: Franklin County Corrections

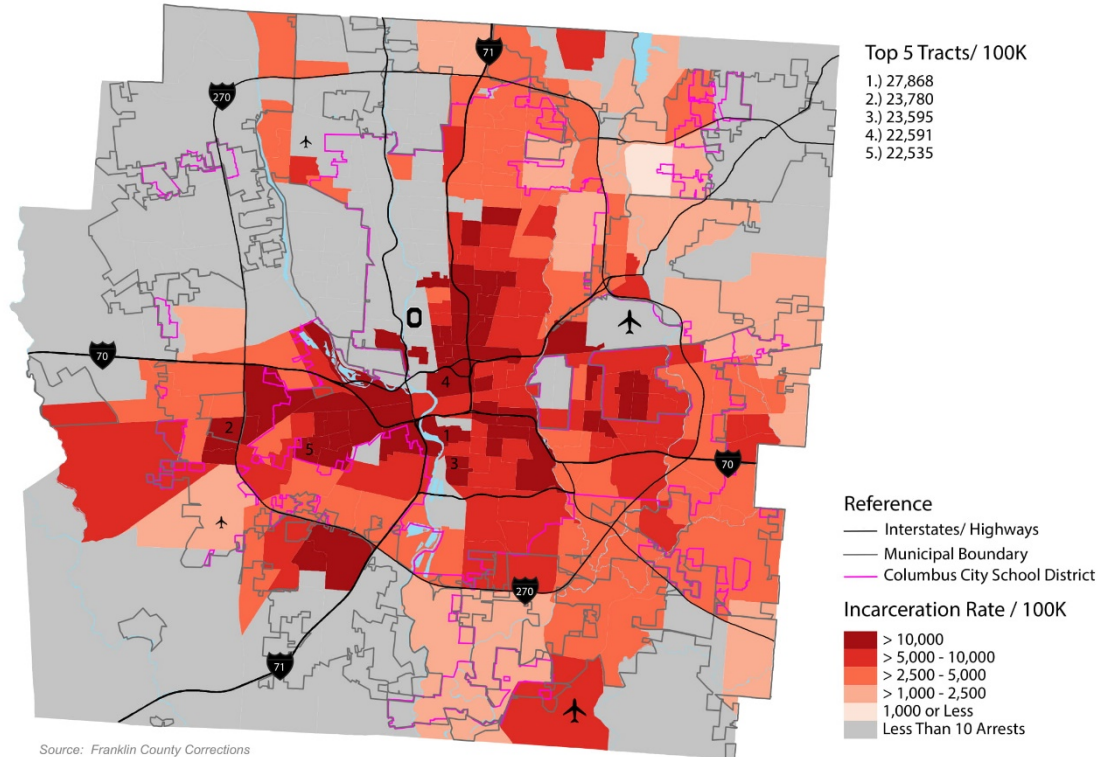
**School District and Municipal Boundaries are approximate for legibility reasons

- This map follows the upside-down “t” pattern
- Incarceration is heavily associated with race, poverty, income, and wealth
- Incarceration is associated with unemployment
- The following two maps illustrate incarceration rates for blacks and whites

HEALTH: INCARCERATION

INCARCERATION IS TRAUMATIC FOR FAMILIES, BREAKING UP HOUSEHOLDS, AND LOWERS LIFE EXPECTANCY OF THOSE INCARCERATED

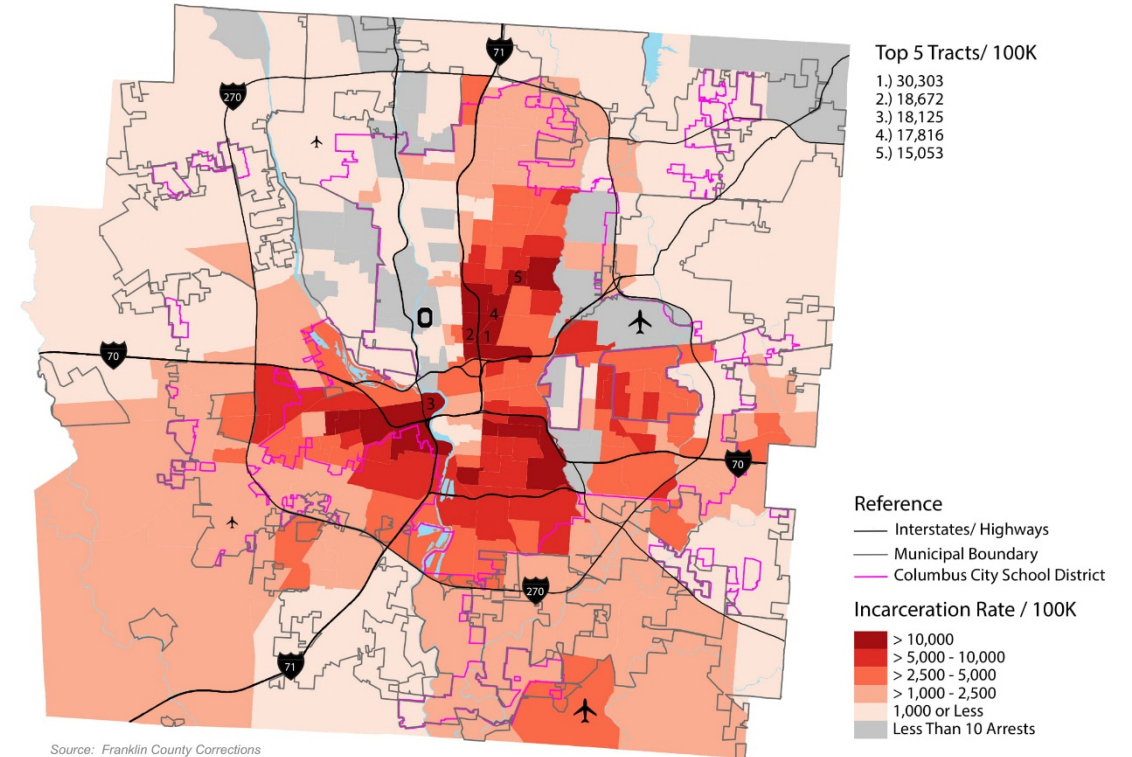
Black Incarceration Rate 2016 - 2017



Source: Franklin County Corrections

**School District and Municipal Boundaries are approximate for legibility reasons

White Incarceration Rate 2016 - 2017



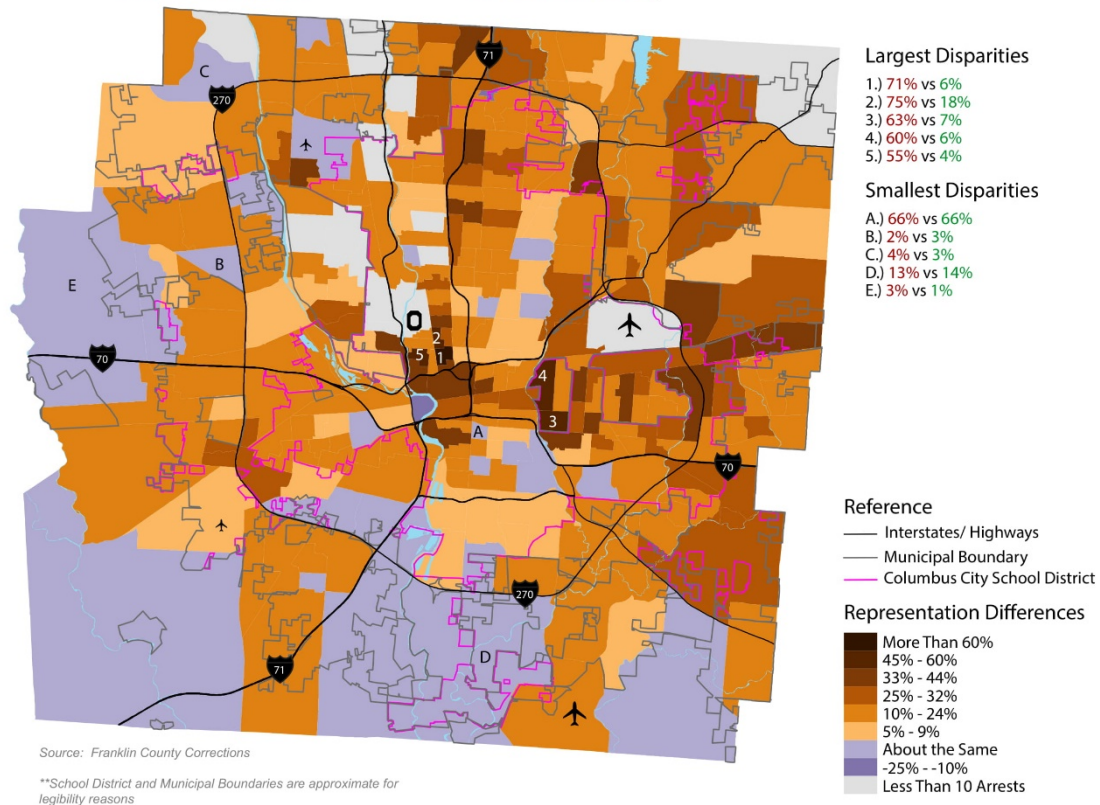
Source: Franklin County Corrections

**School District and Municipal Boundaries are approximate for legibility reasons

HEALTH: INCARCERATION

INCARCERATION IS TRAUMATIC FOR FAMILIES, BREAKING UP HOUSEHOLDS, AND LOWERS LIFE EXPECTANCY OF THOSE INCARCERATED

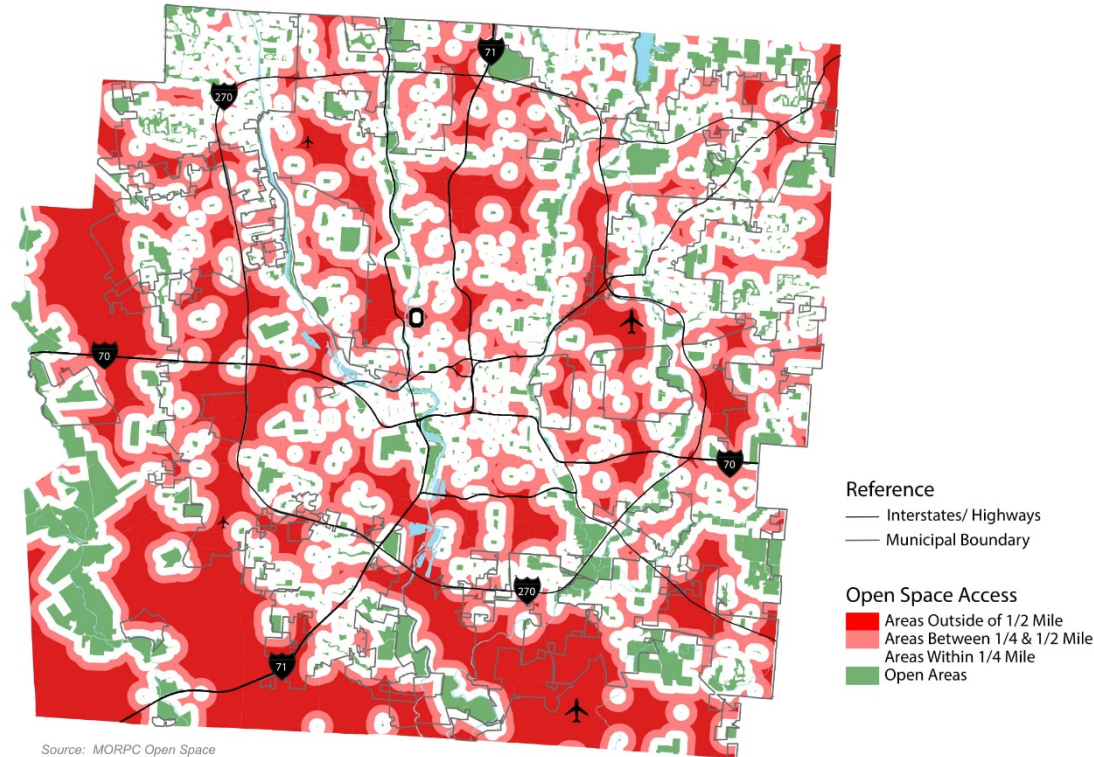
% Black **Incarcerated** vs % Black **In Community** 2016 - 2017



- In the majority of census tracts, blacks are overrepresented in incarceration compared to whites
 - Areas with the greatest racial disparities in incarceration rates include the Short North, Weinland Park, Bexley, and Harrison West
- White areas with higher incomes exhibit higher disparities than other communities
- Neighborhoods of transition (i.e. places that are gentrifying or declining) exhibit higher disparities than other communities

HEALTH: PROXIMITY TO PARKS AND OPEN SPACES

Proximity to Parks and Open Spaces



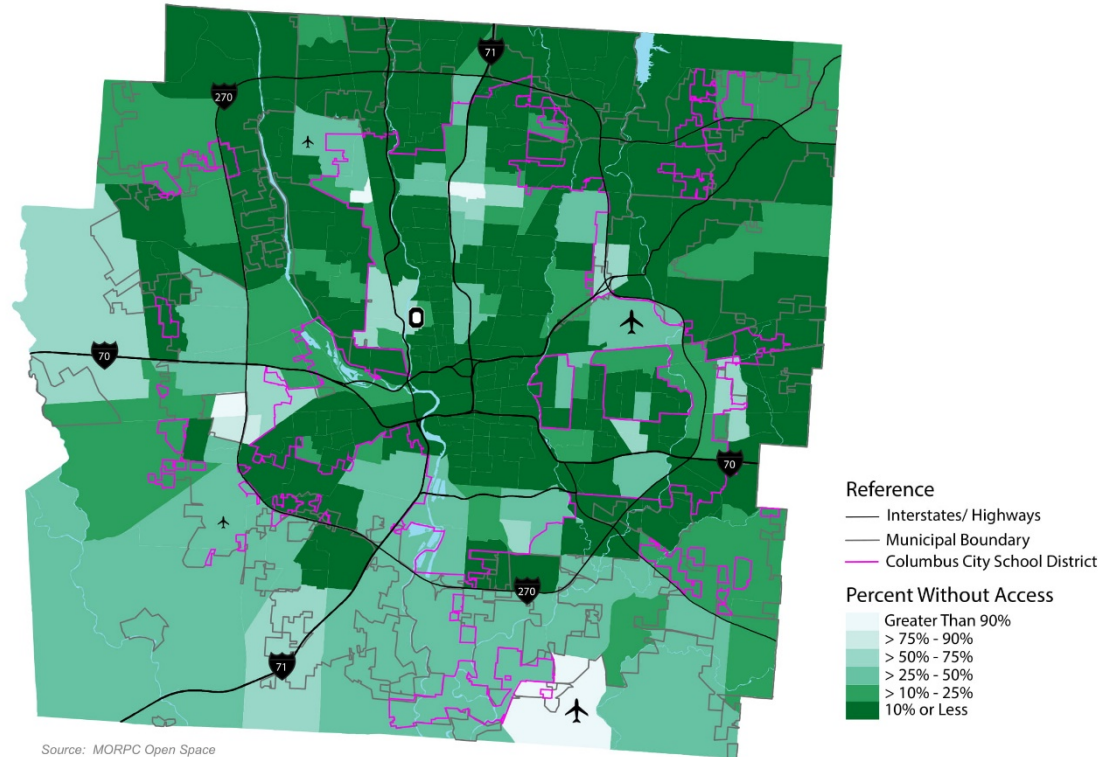
Source: MORPC Open Space

**School District and Municipal Boundaries are approximate for legibility reasons

- Green areas are places defined as open space by the Mid-Ohio Regional Planning Commission
- Red areas lack access to open space

HEALTH: PROXIMITY TO PARKS AND OPEN SPACES

Proximity to Parks and Open Spaces Within 1/2 Mile



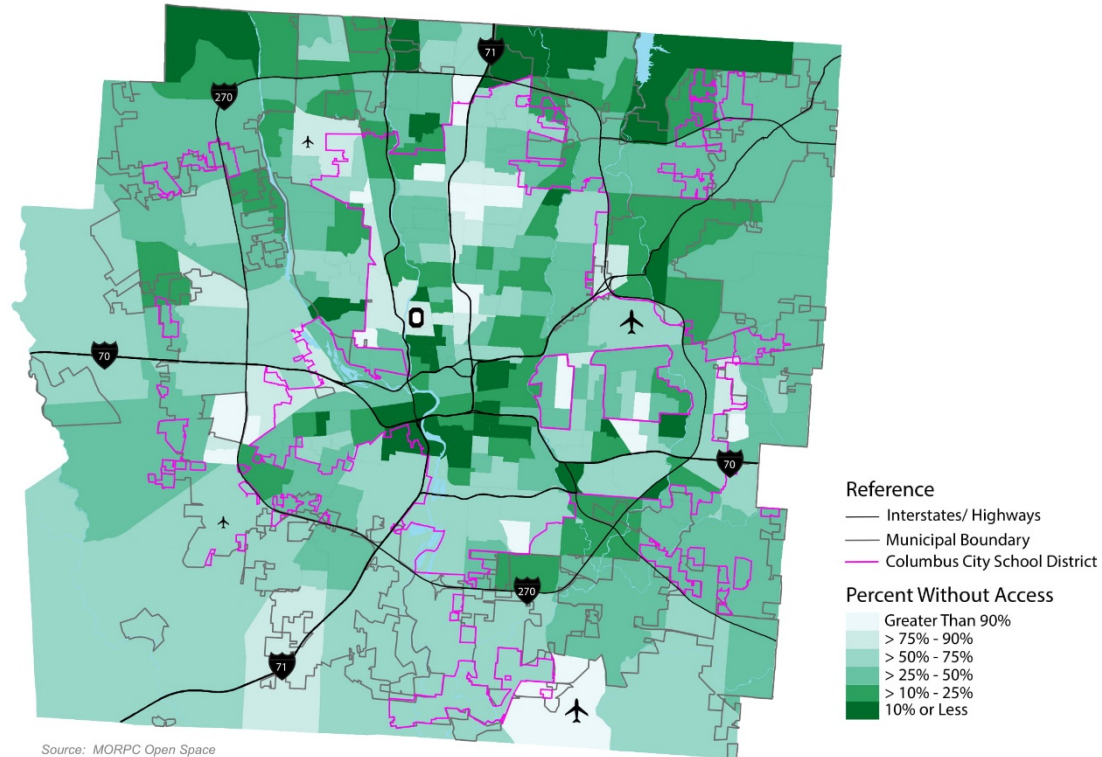
Source: MORPC Open Space

**School District and Municipal Boundaries are approximate for legibility reasons

- North Linden, Rickenbacker, Northwest Columbus, and Lincoln Village are areas in need of increased access to open space
- There is greater access to open space along rivers

HEALTH: PROXIMITY TO PARKS AND OPEN SPACES

Proximity to Parks and Open Spaces Within 1/4 Mile



Source: MORPC Open Space

**School District and Municipal Boundaries are approximate for legibility reasons

- Walkability to open spaces in problematic in Franklin County
- Development practices, metro parks, and urban core investment influence walkability to open space

HEALTH: FOOD ACCESS

- In the following maps, we display food access by car, bus, and walking.
- We calculate food access differently for each mode of transportation measured by distance to stores.
- Each store was categorized as health, moderately healthy, or least healthy
- **Access by car** was measured by a distance of 1 mile to a food outlet as the crow flies
- **Access by bus** was determined both by frequency of bus service for stores located within a quarter mile of bus stops measured as the crow flies
- **Access by walking** was measured by a distance of one quarter mile to a food outlet as the crow flies



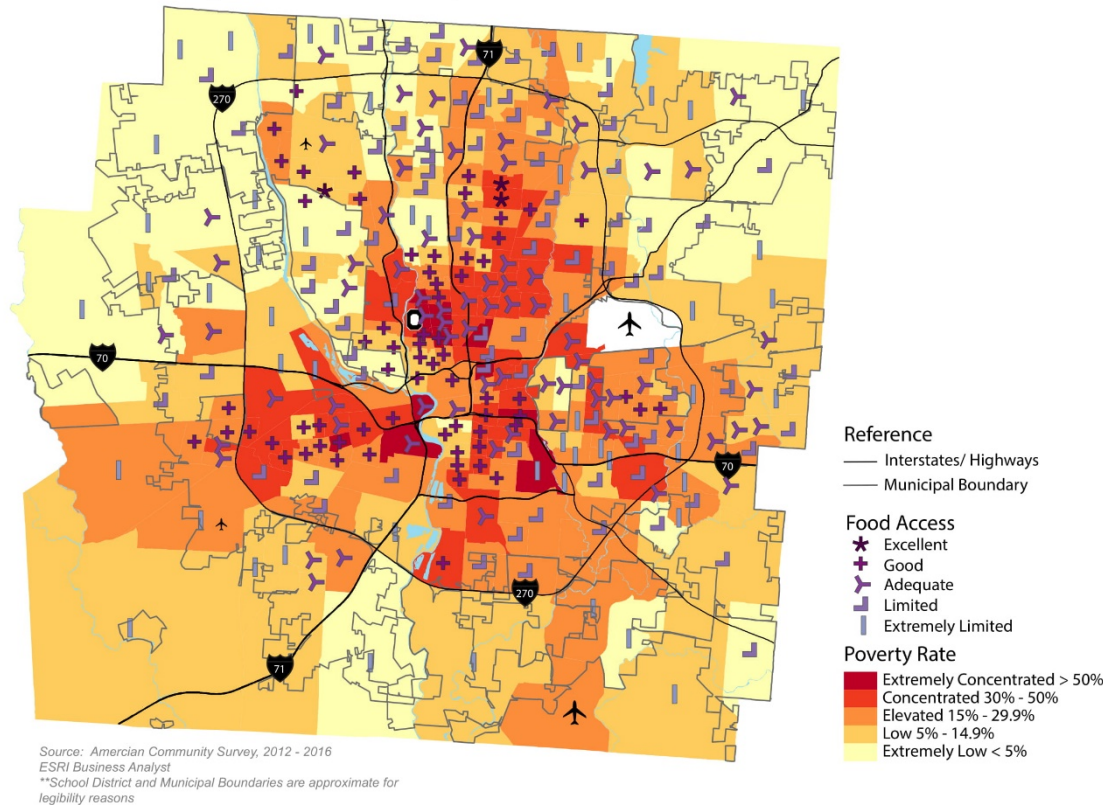
HEALTH: FOOD ACCESS

- **Healthy outlets** include full service grocery stores, wholesale clubs (i.e. Costco or Sam's club, etc.), and specialty markets
- **Moderately healthy outlets** include smaller grocers and international markets
- **Least healthy outlets** include convenient stores and corner stores
- **Excellent access** is defined as having access to two or more of both healthy and moderately healthy outlets
- **Good access** is defined as having access to at least one of both healthy and moderately healthy outlet
- **Adequate access** is defined as having access to one healthy outlet
- **Limited access** is defined as having no healthy access but do have access to at least one moderately healthy outlet
- **Extremely limited access** is defined as having no access to healthy or moderately healthy outlets



HEALTH: FOOD ACCESS - CAR

Food Access by Car with Poverty Rates 2016



- Most people in Franklin County have access to food by car
- The James and Livingston Road area exhibits extremely limited access by car
- South Linden and the northern half of the Near East Side also exhibit extremely limited access by car
- The Morse Road, Sawmill Road, and Bethel Road corridors have the best access to food by car

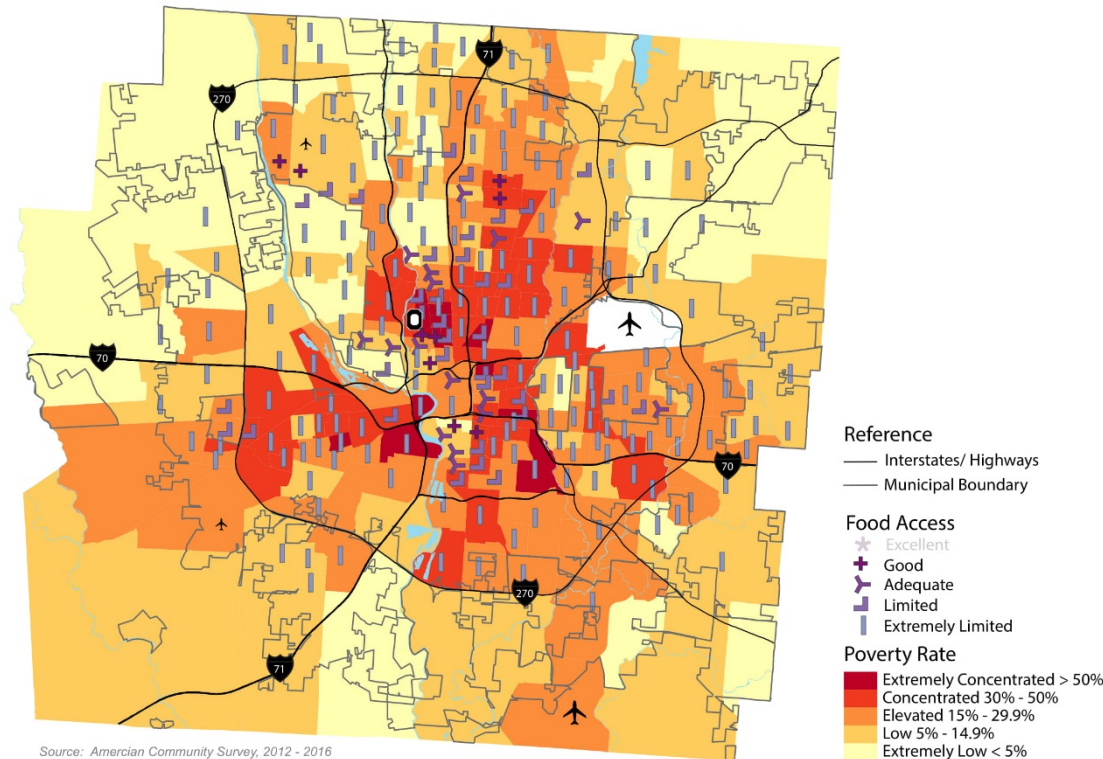


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HEALTH: FOOD ACCESS - BUS

Food Access by Bus with Poverty Rates 2016

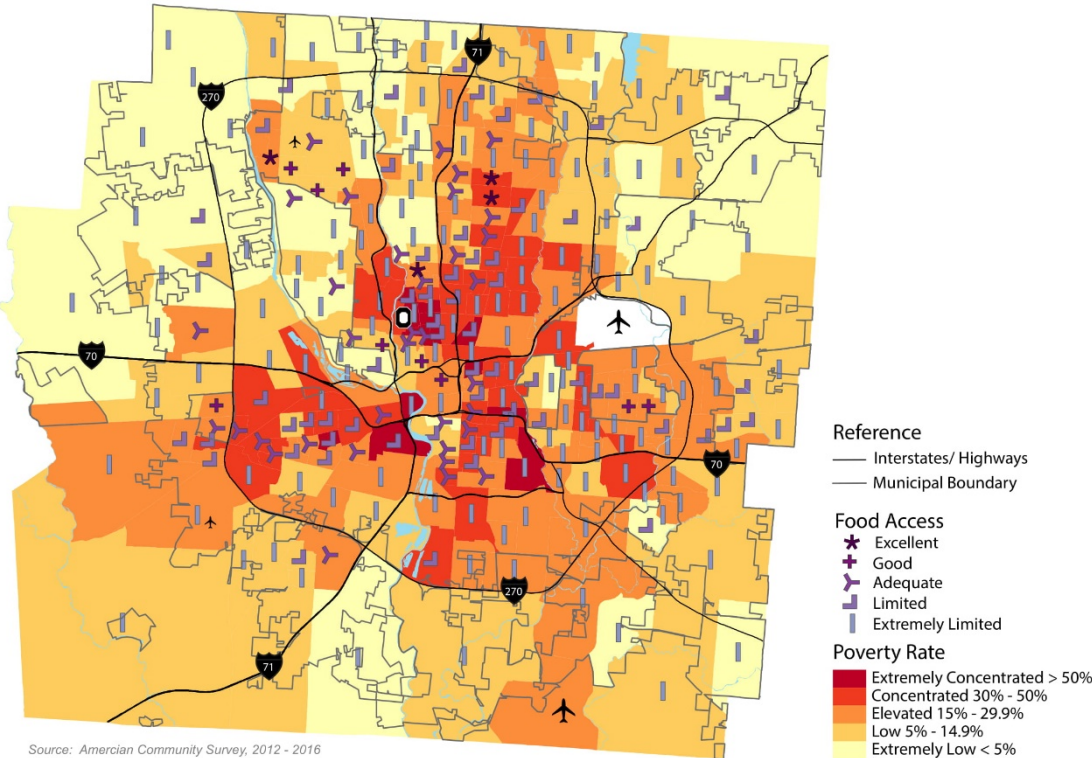


Source: American Community Survey, 2012 - 2016
 ESRI Business Analyst
 **School District and Municipal Boundaries are approximate for legibility reasons

- Route frequency matters and severely restricts food access by bus in the majority of the county
- There is no area that has excellent food access by bus
- The areas of highest concern include the South Side, James/Livingston corridor, South Linden, and the Hilltop
- The areas with best access by bus include the Bethel Road/Sawmill Road intersection, the Morse Road corridor, south High Street between campus and downtown, and the German Village Area

HEALTH: FOOD ACCESS - WALKING

Food Access by Walking with Poverty Rates 2016



Source: American Community Survey, 2012 - 2016
ESRI Business Analyst
**School District and Municipal Boundaries are approximate for legibility reasons

- Places with good or excellent food access are places with access to multiple grocery stores within walking distance and are concentrated along the Bethel Road corridor/Sawmill intersection, Morse Road, Lincoln Village, and a few others
- Some places exhibit better access by walking than by bus because of bus route frequency



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EDUCATION

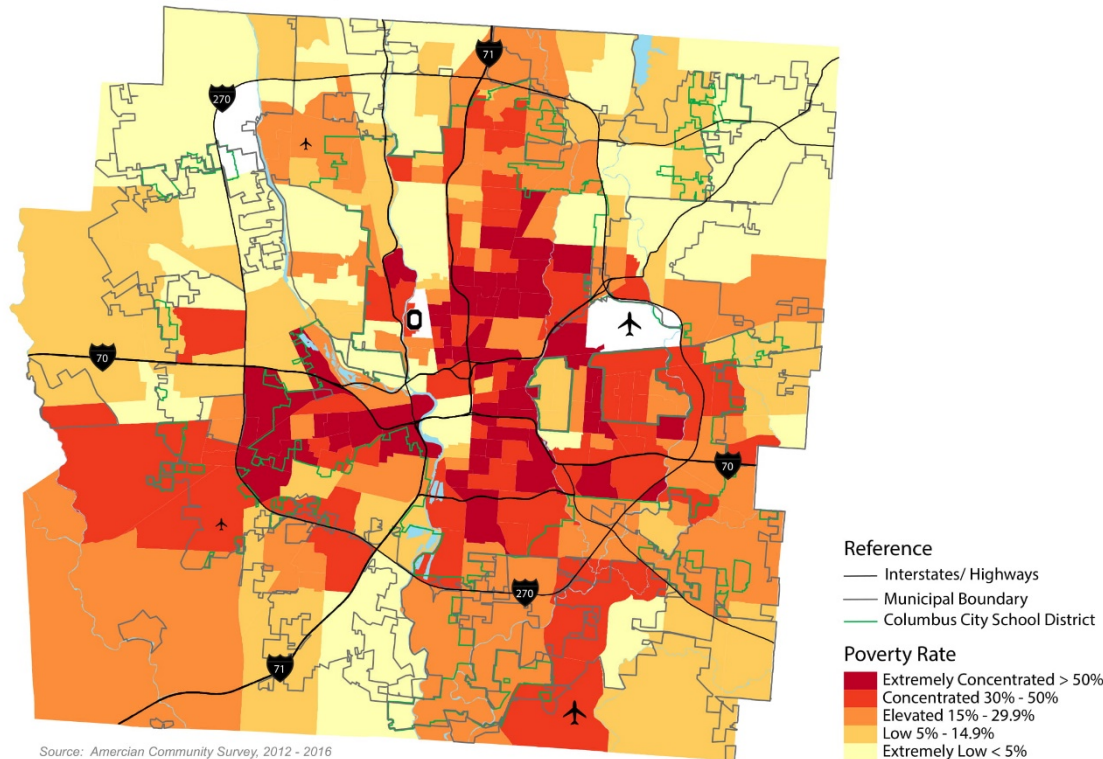


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YOUTH POVERTY

Franklin County Poverty Rates For Those 18 and Under in 2016



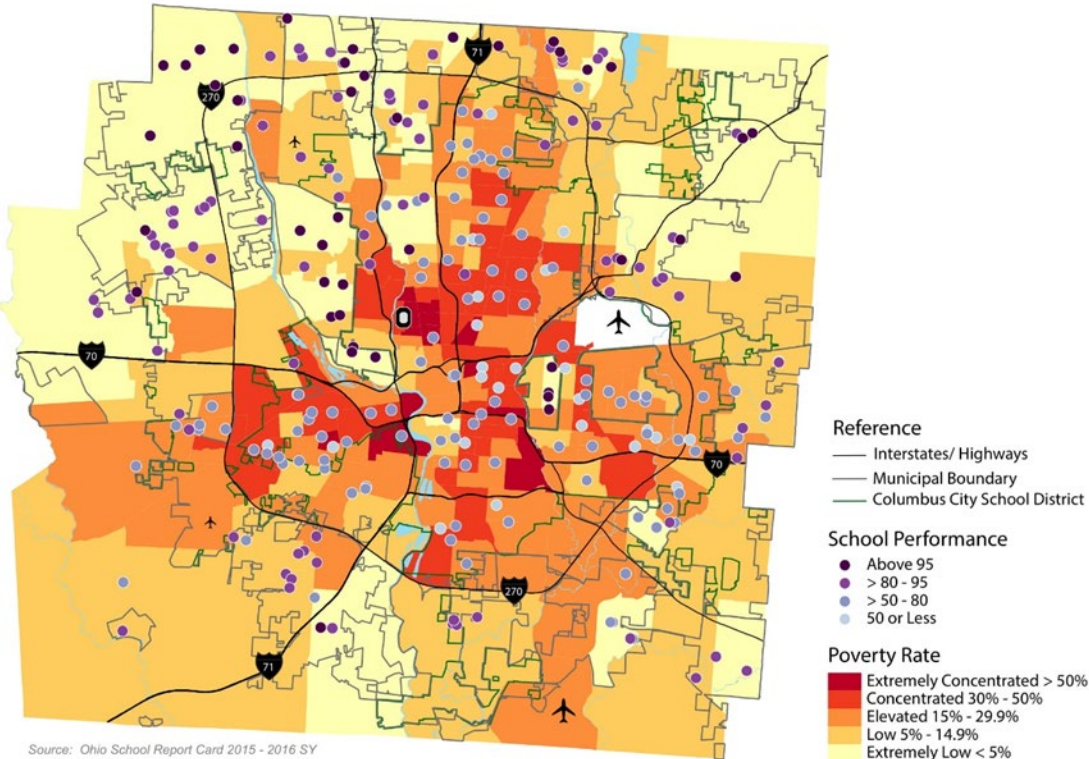
Source: American Community Survey, 2012 - 2016

**School District and Municipal Boundaries are approximate for legibility reasons

- Youth poverty follows the upside-down “t” shape
- However, even wealthy suburban spaces have youth in poverty
- School district boundaries matter

EDUCATION – SCHOOL PERFORMANCE

2015/ 2016 School Performance Index With Poverty Rates in 2016



Source: Ohio School Report Card 2015 - 2016 SY

**School District and Municipal Boundaries are approximate for legibility reasons

- The Performance Index measures test score performance among students taking tests
- School district boundaries matter
 - Every suburban district except Whitehall and Southwestern exhibit high performance rates
 - Columbus, Whitehall, and Southwestern school districts exhibit the lowest performance rates
- School performance is associated with neighborhood poverty rates

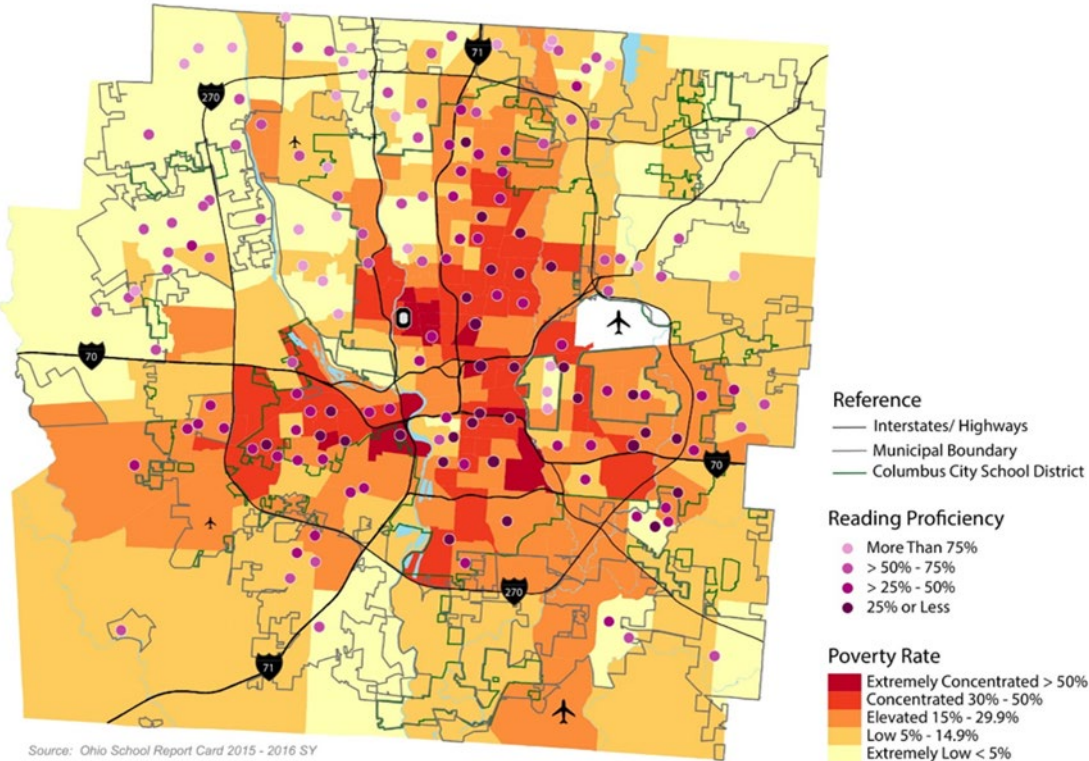


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EDUCATION –THIRD GRADE READING PROFICIENCY

2015/ 2016 Third Grade Reading Proficiency With Poverty Rates in 2016



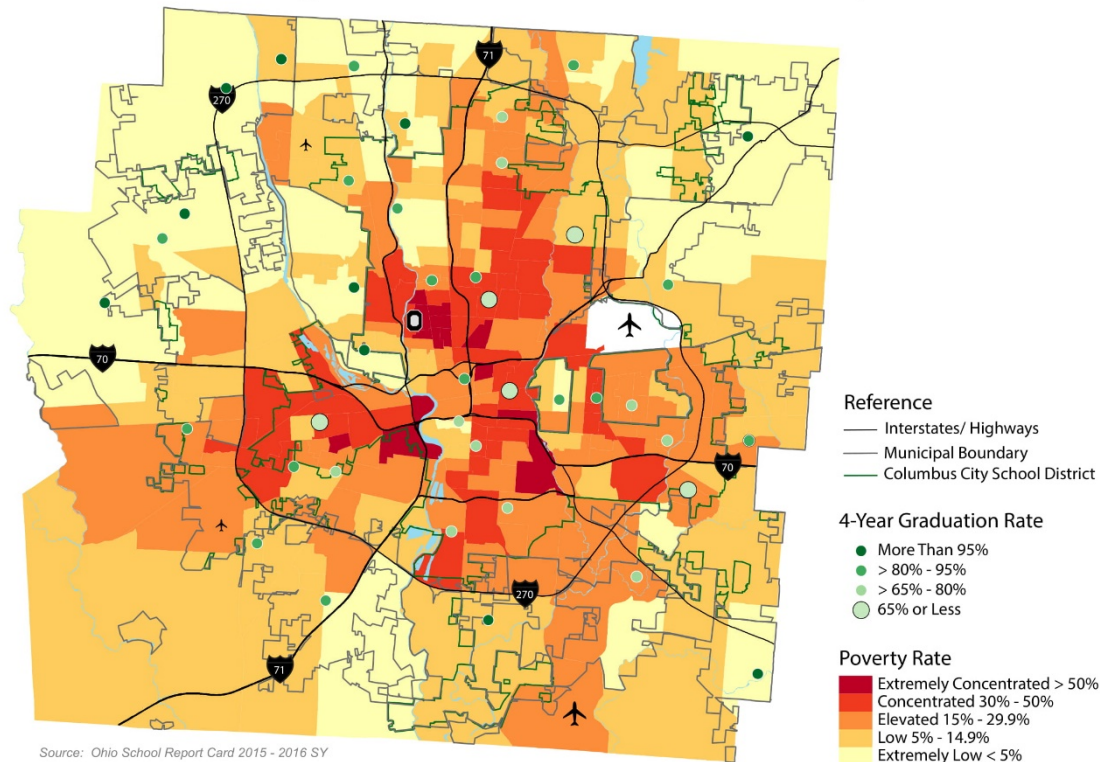
Source: Ohio School Report Card 2015 - 2016 SY

**School District and Municipal Boundaries are approximate for legibility reasons

- Reading proficiency is defined as the percentage of student who read at third grade level as determined by the state of Ohio
- Lighter colored dots indicate higher reading proficiency rates
- For the most part, reading proficiency is inversely related to poverty
- School district boundaries matter
- Suburban areas with low poverty and third grade reading proficiency rates have high immigrant populations

EDUCATION –HIGH SCHOOL GRADUATION

2015/ 2016 4-Year High School Graduation Rate With Poverty Rates in 2016



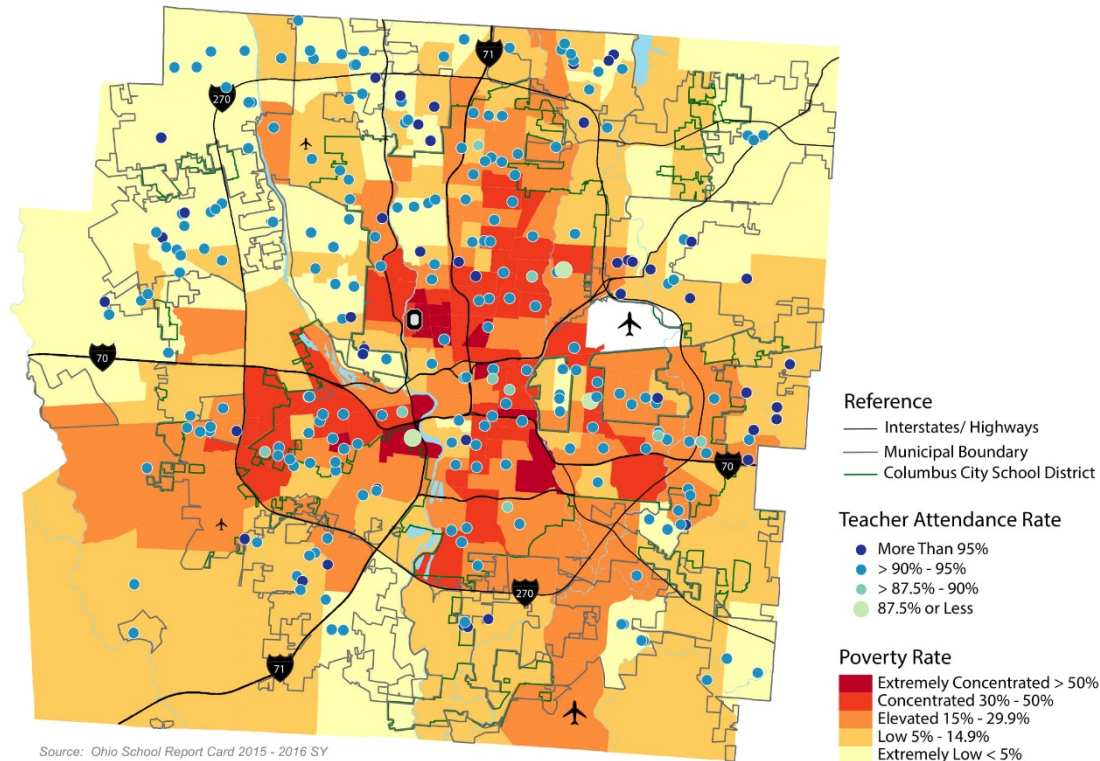
Source: Ohio School Report Card 2015 - 2016 SY

**School District and Municipal Boundaries are approximate for legibility reasons

- Darker colored smaller dots indicate high graduation rates while lighter colored bigger dots indicate lower graduation rates
- School district boundaries matter
- This map is very similar to the performance and reading proficiency maps

EDUCATION – TEACH ATTENDANCE RATE

2015/ 2016 Teacher Attendance Rates With Poverty Rates in 2016



Source: Ohio School Report Card 2015 - 2016 SY

**School District and Municipal Boundaries are approximate for legibility reasons

- Teacher attendance rate calculates the number of days in a school year that teachers are absent
- School district boundaries matter
- Teacher attendance rates tend to be lower in places where poverty is higher

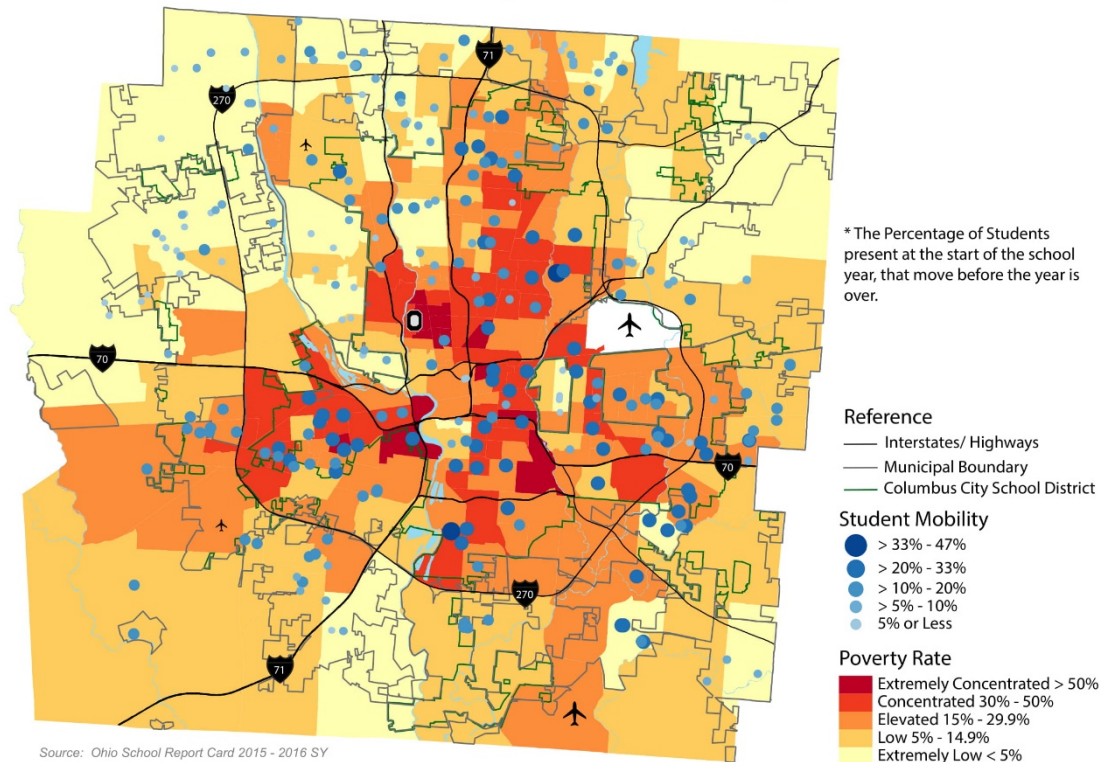


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EDUCATION – STUDENT MOBILITY

2015/ 2016 School Student Mobility Rate* With Poverty Rates in 2016



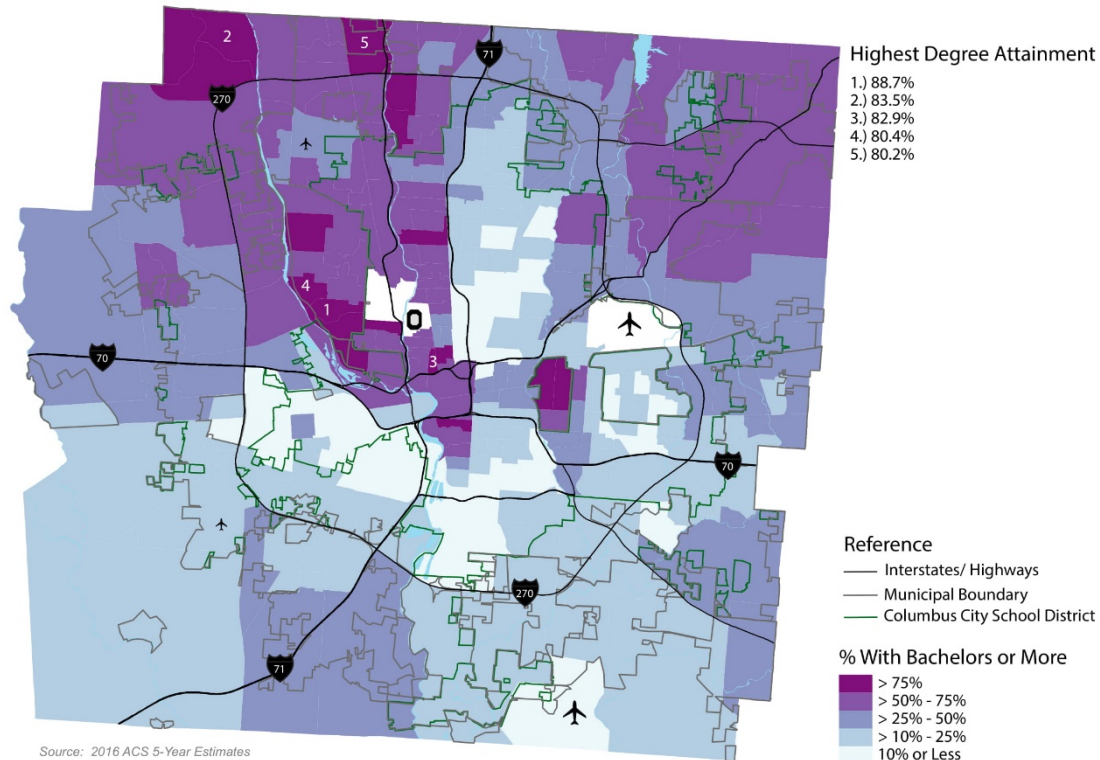
Source: Ohio School Report Card 2015 - 2016 SY

**School District and Municipal Boundaries are approximate for legibility reasons

- Student mobility rates measure the percentage of students who start the school year in one school and change schools during the same school year
- School district boundaries matter
- Student mobility rates are associated with poverty
- Student mobility is related to housing instability and directly impacts school performance – impacting the performance of the students who move *and* their peers who did not move

EDUCATION – EDUCATIONAL ATTAINMENT

2016 Percentage with a Bachelor's Degree or More



Source: 2016 ACS 5-Year Estimates

**School District and Municipal Boundaries are approximate for legibility reasons

- Educational attainment is highest in places with low poverty rates
- There are higher rates of educational attainment in the northern portion of the county
- Gentrification can be seen on this map



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