



Strong Foundation, Focused Future

2018 Annual Report | 2019 Strategic Plan



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Ohio's storied legacy
sets the stage
for an exciting future
full of possibilities.
We invite you to read on
to see how JobsOhio
is partnering with
the world's most
innovative companies
to realize those possibilities.

Is your company next?



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The London Stock Exchange Group launches its first ELITE USA program in Athens, Ohio.

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A Message From JobsOhio Leadership

It's a privilege to pen an annual letter following a year of record performance at JobsOhio.

Our 2018 job creation, new payroll and new capital investment results are the most that our associates and partners have ever achieved. It is also an opportune time to reflect on how far JobsOhio has come and the great runway ahead of it.

2018 Highlights

For 2018, JobsOhio achieved 266 project wins with companies that committed to create 27,071 new jobs with \$1.3 billion of new payroll, retain 69,905 existing jobs and invest \$9.6 billion of new capital. The job creation and payroll metrics represent 19% and 23% increases respectively over 2017 results. Additionally, 73% of our projects were with small and middle-market enterprises.

In December, Ernst & Young released its 2018 U.S. Investment Monitor. Ohio ranked first for job creation in business investment projects for the second year in a row, beating out Texas (#2) and Georgia (#3). Ohio also ranked first for total project wins and fourth for capital investment, and we increased our market share of job creation, project wins and capital investment from 2017 results.

In June, McKinsey & Company completed its performance assessment of JobsOhio. We are very pleased with the findings and conclusions (the full report is posted on our website). McKinsey evaluated JobsOhio's results and outcomes, along with its operating model and organizational health. The assessment noted JobsOhio's top 5 performance, leading transparency, high incentive returns and funding efficiency, unique structure and key operating advantages over our peers. The report also includes considerations for JobsOhio to improve certain internal processes, elevate our impact on the state's business environment and strengthen Ohio's competitiveness.

While 2018 saw many positive announcements, JobsOhio did not always win. Columbus made the short list for

Amazon's HQ2 project, but in the end was not selected. We were disappointed by the company's decision because we compete to win, not to just make the short list. However, the process highlighted the strengths of JobsOhio and our regional partner Columbus 2020, and the remarkable collaboration between the city, state, and corporate partners. This experience not only showcased Columbus and Ohio, but also highlighted key elements needed at both the state and community levels to win.

Last year also brought news that General Motors (GM) would end production of its Cruze automobile at its Lordstown facility, impacting approximately 1,500 workers. GM's decision has generated significant attention at the local, state and national levels. JobsOhio has maintained a strong dialogue with GM's senior team, including meetings with the company's CEO, and continues to explore opportunities for retaining jobs for the Lordstown workers.

JobsOhio Has Come a Long Way...

It is amazing to think how JobsOhio has grown and evolved since 2011 when Gov. Kasich laid out his vision for economic development. We are proud of this great company, team and culture that has been built. We owe much of this to key principles, such as sound investment discipline and management's ability to successfully leverage JobsOhio's private funds to attract additional investment from other capital providers.

We also attribute our growth to stronger relationships among JobsOhio's partners, including our six regional partners – Appalachian Partnership for Economic Growth, Dayton Development Coalition, Regional Growth Partnership, Team NEO, REDI Cincinnati and Columbus 2020 – as well as others, such as the Ohio Business Roundtable, Cincinnati Business Committee, Greater Cleveland Partnership and Columbus Partnership.

Our plan is centered on strengthening key areas to address some of Ohio's economic headwinds, as well as identifying the resources and partners needed to pursue them.



JobsOhio works for the benefit of all Ohioans.

...And Has a Great Runway Ahead

McKinsey's performance assessment led us to refresh our strategic thinking and emphasize JobsOhio's initiatives going forward. Our plan is centered on strengthening key areas to address some of Ohio's economic headwinds, as well as identifying the resources and partners needed to pursue them. Specifically, we are focused on enhancing talent, sites and innovation.

In talent, this includes expanding our existing talent acquisition program to address the undersupply of workforce at the middle-skill levels, and increasing tech talent systemically across the state through upskilling programs. In sites, this means continuing to invest in properties to increase the number of locations for companies to grow in both urban and rural areas of the state, and leveraging our capital to attract larger amounts of site investment from other private and public financing sources. In innovation, this includes increasing efforts to attract more fast-growing companies, both domestic and international, and providing more capital solutions for growth-stage companies.

One key advantage of JobsOhio is the strong financial position we have built. Through our financial discipline, JobsOhio

has the capacity to not only pursue initiatives in these three areas, but also to amplify JobsOhio's efforts, activities, and ultimately its impact. The combination of our team, partners and financial capacity positions JobsOhio to continue its growth and to compete for any deal in the country.

JobsOhio's future success will depend on the continuation of the organization's focused mission and strategic approach, as well as its independence and strong corporate governance. Since its inception, JobsOhio has worked effectively with the state's leadership, including Gov. Kasich and his team, and looks forward to working collaboratively with the new administration of Gov. DeWine and Lt. Gov. Husted, along with legislative leaders.

Thank You

One of JobsOhio's greatest qualities is our board of directors. We thank Barbara Snyder, president of Case Western Reserve University, who joined the board in January 2015, for her service on the board. We also thank Gary Heminger, chairman and CEO of Marathon Petroleum Corporation, who joined that board of directors at the beginning of JobsOhio in 2011. Both have played an integral part in the company's growth and success. We are grateful for their leadership and

direction that has served JobsOhio and Ohio very well. Also, we welcome Dr. Jerry Sue Thornton as our newest board member and are thrilled about her joining JobsOhio and the valuable experience she brings.

Lastly, thank you for the opportunity to lead this company. The last seven-plus years have taken us on an amazing journey for which we will be forever grateful. We have truly enjoyed working to build such a great organization and its mission, vision and success, and we look forward to watching JobsOhio continue to grow and thrive. JobsOhio's strong structure, values and culture give us confidence in the company's future and the impact it will continue to have. But the most important part of JobsOhio are its associates – we thank them for their commitment, dedication and drive to making JobsOhio the best economic development organization.

James C. Boland
Board Chairman

John F. Minor, Jr.
President and Chief Investment Officer

JobsOhio

Strong Results,
Positive Momentum

JobsOhio's best year yet.

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266

Total Projects

\$9.6 Billion

Capital Investment

27,071

New Jobs

\$1.3 Billion

New Jobs Payroll

69,905

Retained Jobs

\$4.2 Billion

Retained Jobs Payroll

JobsOhio Year-Over-Year Results

JobsOhio works collaboratively with regional and local economic development partners across the state to help companies create and retain jobs and payroll and support capital investment.

JobsOhio Metrics*	2016	2017	2018
Total Projects	284	272	266
New Jobs	20,603	22,788	27,071
New Jobs Payroll	\$994 Million	\$1.1 Billion	\$1.3 Billion
Retained Jobs	76,773	67,849	69,905
Retained Jobs Payroll	\$4.3 Billion	\$4.7 Billion	\$4.2 Billion
Capital Investment	\$4.6 Billion	\$9.6 Billion	\$9.6 Billion

2018 Targeted Industry Results

Industries	New Jobs	Retained Jobs	Capital Investment (\$ Millions)
Logistics and Distribution	6,664	815	\$883
Advanced Manufacturing	6,078	20,444	\$2,351
Healthcare	3,934	6,173	\$266
Automotive	2,703	19,488	\$1,051
Financial Services	2,029	3,048	\$134
Food and Agribusiness	1,581	5,110	\$434
Aerospace and Aviation	1,368	8,039	\$56
Energy and Chemicals	1,060	3,636	\$3,756
Technology	990	1,532	\$621
Other**	664	1,620	\$78
Total	27,071	69,905	\$9,630

*Commitments **Represents Headquarters and Back Office



CoverMyMeds in Columbus, Ohio.

Building the Future Economy...

8 2018 was JobsOhio's best year yet, surpassing previous years in both job creation and new capital investment.

Each year, JobsOhio takes the time to reflect on its current performance in order to build future capability.

Here are some of the 2018 highlights:

- **Amazon committed to create 1,500 new jobs in Central Ohio, the biggest new job commitment JobsOhio secured during the year. CoverMyMeds also committed to create 1,032 new jobs in Central Ohio and First Solar committed to create 1,000 jobs in Northwest Ohio, helping drive JobsOhio's record year.**
- **HomeGoods, Inc. committed to create 1,000 new jobs in Northeast Ohio.** This project exemplified the importance of the partnership between JobsOhio and its regional and local partners in order to see this company's commitment materialize in Ohio.
- **The Research and Development (R&D) Center Grant program received additional funding through the approval of the JobsOhio board of directors, which led to several projects that will facilitate innovation in Ohio, including:**
 - » **Nanogate Jay Systems LLC:** R&D for applications in the areas of chrome and stainless-steel alternatives, decorative surface finishes and innovative lighting.

- » **Pillar Technology:** R&D for testing, development and deployment of safe, reliable autonomous vehicle technologies.
- » **Toyodenso/Weastec:** R&D for the design and development of vehicle electrical components.
- » **Dana Incorporated:** R&D for engineered solutions for improving the efficiency, performance, and sustainability of powered vehicles and machinery.
- » **JPMorgan Chase:** Financial technology (fintech) lab created by JPMorgan Chase's R&D arm at The Point at Otterbein University.
- » **Inteva Products:** R&D for vehicle interiors systems (e.g., instrument panels, door trim, floor consoles, interior surfaces, stitching).
- » **Honda:** Expansion of current R&D center to advance driver-assistive and human interface systems to support Honda's vision for a collision-free society.
- » **COTSWORKS:** New R&D facility focused on innovation in aerospace optical components.
- » **GE Aviation:** R&D related to hybrid electric propulsion technology for aviation.



GE Aviation in Cincinnati, Ohio.

- **Upstart, a platform that leverages artificial intelligence (AI), is planning a new location in Central Ohio in 2019.** Upstart's market entry to Ohio from California will represent another positive validation of the business climate offered to innovative, scaling companies: talent, strategic relationships and cost-competitive operations.
- **JobsOhio launched a talent acquisition service (TAS) in 2016.** In 2018, JobsOhio began marketing and attraction as well as training and screening support for several clients. JobsOhio continues to build out the team and capabilities to further this ongoing effort to help companies find talent.
- **SiteOhio continues to build authenticated sites to mitigate risk for businesses.** By the end of 2018, JobsOhio authenticated 16 sites that are immediately ready for construction.
- **For its high-level of transparency, JobsOhio received GuideStar's Platinum Seal of Transparency, and the Ohio Association of Nonprofit Organizations' Seal of Excellence.** You can find more about these accomplishments on page 20.

JobsOhio is proud of these accomplishments, but there's more work to do.

Ohio's economic development network builds on these experiences to prepare for future opportunity.



...And Evolving Along the Way

JobsOhio is continuously improving.

While JobsOhio celebrates new project investments, there are lessons learned from lost projects, too.

Lost opportunities allow the JobsOhio team, in conjunction with its robust network or regional and local partners, to learn and grow to improve for the future of the citizens and communities of Ohio.

- **Amazon HQ2.** Many of JobsOhio's regional partners submitted proposals in the fall of 2017 which was a feat in itself. This project was unlike anything the economic development community experienced before. In 2018, the Columbus region made the list of 20 finalists, and JobsOhio worked alongside its partners at Columbus 2020 as well as locals in the community to support company visits to Ohio. Although Ohio did not win the project, JobsOhio and its partners are better prepared to attract large-scale corporate headquarters to Ohio. The partnership with Amazon continues in a number of ways across Ohio, including several distribution centers, Amazon Web Services and a recent announcement in 2018 with Amazon Air for an investment in Wilmington Air Park.

- **Apple.** JobsOhio's relationship with Apple led to Ohio's competing for the company's proposed second campus. Apple did not choose Ohio. However, during the process, JobsOhio strengthened its relationships with Apple. Ohio already benefits from Apple's support of The Ohio State University's Digital Flagship University, a digital learning initiative and iOS design laboratory that also provides training in Apple's app language.
- **General Motors (GM), Lordstown.** Part of JobsOhio's mission is to retain and support companies that have already invested in Ohio. Having a strong relationship with the GM leadership, JobsOhio remains in close communication with the company, local and regional partners, and the administration and legislative partners to manage the impact of GM's difficult decision to have no product allocation at the Lordstown plant. Recognizing evolving automotive industry and market trends, JobsOhio continues to learn how the team can better support future opportunities for this facility.

Malcolm Forbes once said, "Failure is success if we learn from it." With pencils and minds sharpened, Ohio's economic development network builds on these experiences to prepare for future opportunities.

Partners in Economic Development

It takes a team to achieve the results JobsOhio has this past year, and it will require continued teamwork and collaboration to achieve the goals we have in front of us.

We recognize stronger relationships among JobsOhio's partners, including our six regional partners. The work that happens every day in local communities across the state allows us to expand our reach in working for the citizens of Ohio.

JobsOhio Regional Partners



Public and Private Partners



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“JobsOhio has reinvented and modernized economic development. Not only have other states taken notice, but they envy what Ohio has created. The Ohio Business Roundtable will continue to partner with JobsOhio and its regional partners to maintain the economic momentum achieved over the past eight years since its creation and keep Ohio strong and business-friendly.”

Pat Tiberi, president and CEO of the Ohio Business Roundtable





Ohio Gov. Mike DeWine



Ohio Lt. Gov. Jon Husted

»»

We will build on this momentum by continuing to create a state business climate that is second to none.

»»

A Message from the New Administration

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Ohio has a variety of advantages that can help businesses compete, grow and thrive in the 21st century. This includes world-class learning and research institutions, abundant sources of energy, a diverse industrial base, a strategic location in the middle of the North American market and much more. No asset, however, is greater than our people, whose work ethic and creativity have brought groundbreaking technologies and strong results for companies throughout the world that call Ohio home in communities large and small.

JobsOhio, the state's private economic development corporation, is a critical asset that can swiftly connect businesses with the talent, resources, and solutions to work for your business.

You will find JobsOhio is an economic development entity with a client focus unlike any other in the United States.

As a private nonprofit JobsOhio has industry professionals with specialized experience who understand your sector and will assist you at every step in the process. JobsOhio works side-by-side with its Regional Network Partners in every corner of the state to provide companies with solutions.

This collaborative approach is working, and we are proud that JobsOhio had a record year both in new jobs created and capital investment in 2018. We are confident we have a team in place that is second to none, and we are committed to working alongside JobsOhio to continue the state's momentum in coming years.

Looking forward, we will build on this momentum by continuing to create a state business climate that is second to none.

The JobsOhio team stands ready to assist businesses' efforts to win in today's dynamic and evolving economy. In Ohio, we are poised to take bold steps to create new opportunities and a vibrant future.

We encourage you to contact the JobsOhio team about how Ohio can help you win in today's dynamic economy. Our administration is committed to ensuring Ohio innovates and evolves so we can make investment easy and efficient. We hope you will join us as we move ahead. Let us know how Ohio can work to be a part of your company's success.

Very respectfully yours,

A handwritten signature in blue ink that reads "Mike DeWine".

Mike DeWine
Governor

A handwritten signature in black ink that reads "Jon Husted".

Jon Husted
Lieutenant Governor

The Rise of Ohio – A Midwest Leader in Economic Growth

"Ohio's economy is firing on all cylinders and remains an outperformer among its Midwest peers."

– Moody's, October 2018

Ohio is leading the Midwest in economic competitiveness. Growth in Ohio's private sector gross state product, jobs and wages have outpaced regional states in recent years. The momentum only grew stronger in 2018 with Ohio adding more private sector jobs than any other state in the region. Additionally, Ohio's global engagement has supported a significant increase in jobs from foreign direct investment (FDI) – up 21 percent over the last five years.

The strong foundation Ohio offers – including record budget reserves, a strong credit rating and a favorable tax climate for businesses – appeals to business decision makers. Investments in talent development initiatives and industries that will continue to diversify Ohio's economy address concerns that companies face today and will allow them to continue choosing Ohio in the future.

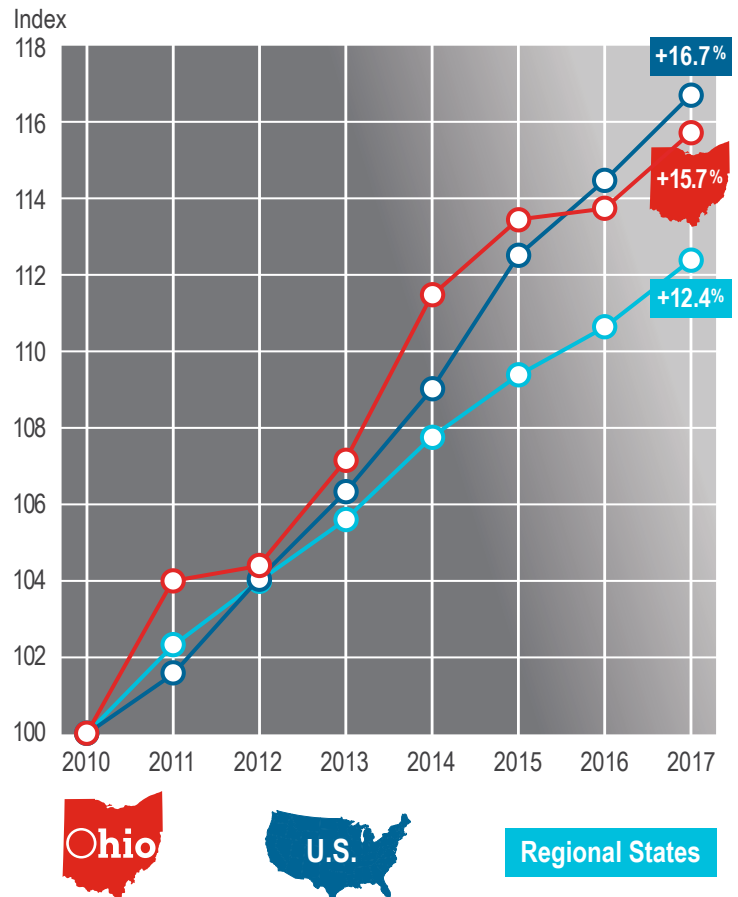
Ohio's growth trajectory continues to garner national accolades. These are a sample of the recognition Ohio received in 2018:

- Ernst & Young's 2018 U.S. Investment Monitor ranks Ohio No. 1 in the nation in jobs and projects.
- Site Selection ranks Ohio No. 4 for state business climate, up from No. 9 in 2011.
- Chief Executive ranks Ohio No. 10 in its Best States for Business rankings, up from 41 in 2011.

Area Development ranks Ohio in the top 10 for competitive labor environment, leading workforce development programs, shovel-ready sites program, and favorable utility rates.

Ohio's continued growth is a testament to the efforts of public and private entities across the state. These successes prove that Ohio continues to be a great state for business.

Real GDP Growth – Private Sector



Source: U.S. Bureau of Economic Analysis

Regional States: IL, IN, KY, MI, PA, WV

"Welcome to the Knowledge Belt. Manufacturing remains a key driver in Ohio's GDP, but the Buckeye State has seen sharp diversification into biohealth, tech and innovative industries, like fintech."

Chief Executive Magazine

JobsOhio Focus Industries Continue to Outperform

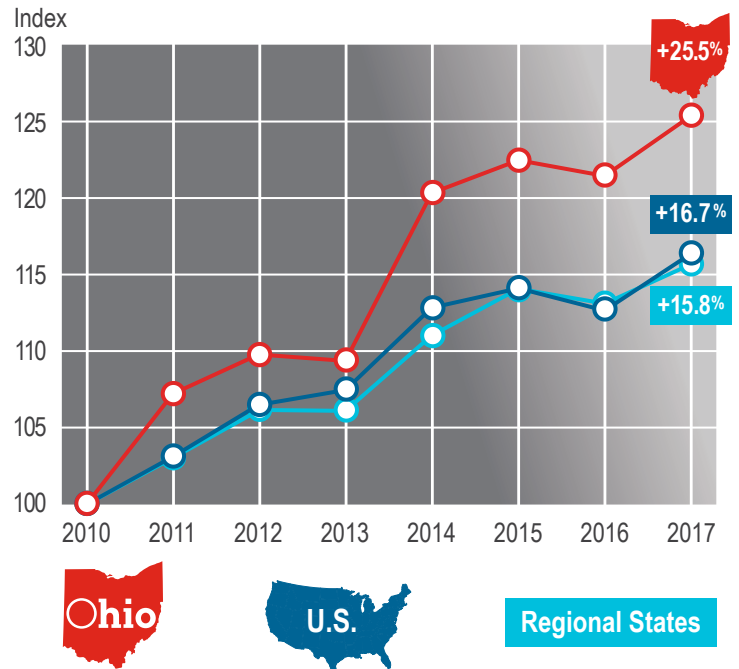
JobsOhio sectors continue on a growth trajectory in gross state product for the private sector that significantly outpaced the U.S. and regional states over the past seven years.

The JobsOhio sector focus has helped fuel the private sector growth in Ohio. The state is becoming more resilient, and in order to continue to foster this growth, JobsOhio will undertake a targeted approach to support of the needs of growth businesses. You can read more about these new initiatives on pages 40 and 41.

Additionally, Ohio's venture capital (VC) funding broke the \$1 billion mark in 2018 for the first time (ranks No. 8), with a 150 percent increase over 2017. Increased VC funding translates into more early stage company growth, primarily in technology and healthcare.

According to Columbus Business First and CB Insights, each of the top five deals in 2018 were larger than the biggest ones of 2017 and 2016.

Real GDP Growth – JobsOhio Industries

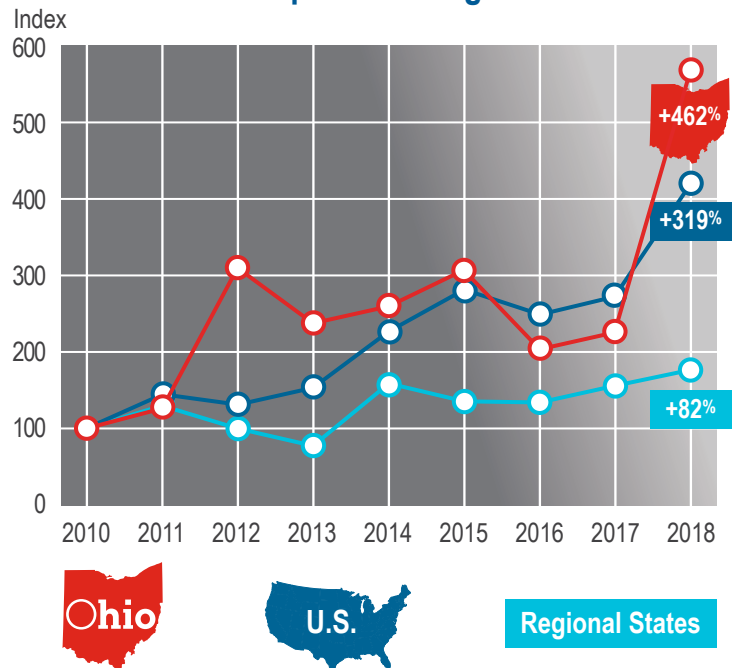


Source: U.S. Bureau of Economic Analysis; Cleveland State University, Center for Economic Development
Regional States: IL, IN, KY, MI, PA, WV

“As technology proliferates and we enter a new era of entrepreneurship, Ohio is positioned to lead in the future of work and innovation. Strong public-private partnerships and an engaged corporate community are fueling the work of our visionary startup founders and investors. The Midwest boasts the raw ingredients to build the next economic powerhouse with Ohio leading the way through collaboration and innovation.”

Falon Donohue, CEO, Venture Ohio

Venture Capital Funding Growth



Source: PitchBook Data
Regional States: IL, IN, KY, MI, PA, WV

Data represents the most recent available information.



Ohio's Competitive Advantage – Its Workforce

First Solar in Perrysburg, Ohio.

14 Ohio's workforce is arguably best-in-class, supporting innovative industries such as manufacturing and healthcare.

With a workforce that is collaborative, committed and loyal, and a higher education system that produces tens of thousands of graduates annually, Ohio offers companies a source of talent that has the creativity to identify and solve the global issues that organizations face today.

Ohio also is taking steps to address the same workforce shortages plaguing the rest of the Midwest and the nation. With a retiring population creating a “knowledge gap” and the younger generations having fewer workers available, Ohio is offering solutions to train and leverage existing and future talent.

Ohio's Talent Production is Diversifying the State Economy

Available tech talent is an essential component to growing the Ohio workforce. With a continued emphasis on attracting tech-based companies to Ohio to diversify the economy, Ohio benefits from the education and innovation at such world-renowned universities and community colleges as The Ohio State University, Case Western Reserve University, Kent State University and the University of Cincinnati, Sinclair Community College, Lorain County Community College, among others.

These pockets of workforce training strength are contributing to growing momentum in workforce retention, attraction and development.

Ohio Cities Among Nation's Top 25 Metro Areas for STEM Professionals

A new report from personal finance website WalletHub named three Ohio cities among the nation's top 25 metro areas for Science, Technology, Engineering and Mathematics (STEM) professionals. The report comes at a time of unprecedented growth in STEM fields. Between 2009 and 2015, the number of jobs in STEM fields grew at twice the rate of all other professions. The growth rate is expected to stay above that of all other



Students use augmented reality technology to study the human body at Case Western Reserve University in Cleveland, Ohio.



Festo in Mason, Ohio.

professions through 2024, according to WalletHub.

Cincinnati was the top Ohio city in the WalletHub listing, ranking as the 10th best metro area for STEM professionals in the nation, followed by Columbus, at 12th, and Dayton, at 22nd. Also ranked on the list were Cleveland, at 43rd; Youngstown, at 66th; Akron, at 72nd; and Toledo, at 91st.

Healthcare Excellence is Driving Growth in the Workforce

Ohio's best-in-class healthcare sector is spurring innovation, as well as attracting and training an increasingly robust source of researchers and lab technicians. Already known as one of the world's top spots for bio-related patents, Ohio's healthcare sector attracts talent from some of the best teaching hospitals and universities in the United States. In Ohio, more than 10,000 bioscience-related degrees and certificates are awarded annually. The state boasts more than 100 schools with bioscience-related programs.

Ohio's healthcare industry employs about 80,000 people and has outpaced national healthcare employment growth for the last five years. Fourteen of the top 50 employers in Ohio are in the healthcare sector.

Akron Workforce Develops Patents, Innovation at Nationally Ranked Pace

A new report by Go.Verizon.com rates the greater Akron area 43rd among the top 50 U.S. places for innovation.

The report ranked the top areas for innovation based upon the number of patents issued by the U.S. Patent and Trademark Office from 2000 to 2015 per 10,000 residents.

Cities appearing on the list tended to be in close proximity to one or more large universities. The University of Akron includes a world-renowned polymer science curriculum. The list also demonstrates that cities that boomed with the automotive industry in the 20th century are now benefiting from a heritage of innovation, attracting a workforce that is producing patents and applying innovation to a changing industry.

JobsOhio recognizes the headwinds associated with talent that companies face today. In 2019, JobsOhio, with private and public organizations, will focus on addressing the workforce talent gap and identifying solutions to build for the future.

JobsOhio supports initiatives that take a proactive approach to preparing Ohio's workforce for today and the years to come.



GE Aviation in Evendale, Ohio.



RAMTEC in Marion, Ohio.

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RAMTECs Train In-Demand Robotics Workforce

Companies are compelled to embrace and incorporate innovation in order to stay competitive. For some companies, this transition is manageable; for others, it is a difficult and slow process.

Industries such as manufacturing are feeling the pressure to evolve. In Ohio, a state steeped in the manufacturing heritage of America, the collaboration of industry, education and government has kickstarted initiatives that keep manufacturing and Ohio thriving.

Partnership With Education Creates Opportunity

In 2013, educators in Marion, Ohio, saw an opportunity to shape training that prepared students for the future while addressing major manufacturing needs. The partnership created Tri-Rivers Career Center's RAMTEC (Robotics and Advanced Manufacturing Technology Education Collaborative) and eventually 22 additional RAMTECs in Ohio.

RAMTEC's mission is to grow Ohio's economy by building a skilled workforce, partnering with effective training programs, and connecting employers with qualified workers in the industry. RAMTEC partners include FANUC, Lincoln Electric, Yaskawa Motoman Robotics, Stratasys, Rockwell Automation and Parker Hannifin.

In 2018, JobsOhio partnered with Ohio Means Jobs, RobotWorx, Honda, Aerotek and CompassTech to help the Tri-Rivers' RAMTEC launch a three-week pilot education program that trains high school students and adults to meet the needs of local employers. JobsOhio contributed \$137,000 in financial support for the program.

Training That Works

By May, the first four students graduated. The program has achieved graduate placement rates as high as 100 percent. At a time when U.S. manufacturing jobs go unfilled for a lack of skilled workers, RAMTEC has developed a certification training program that emphasizes hands-on learning and the basics of robotics.

Manufacturers across the country are competing for skilled workers in an increasingly tight labor pool. JobsOhio helps ensure organizations such as RAMTEC are training the workers that manufacturers need to innovate and compete globally from Ohio.

The JobsOhio Project Pipeline

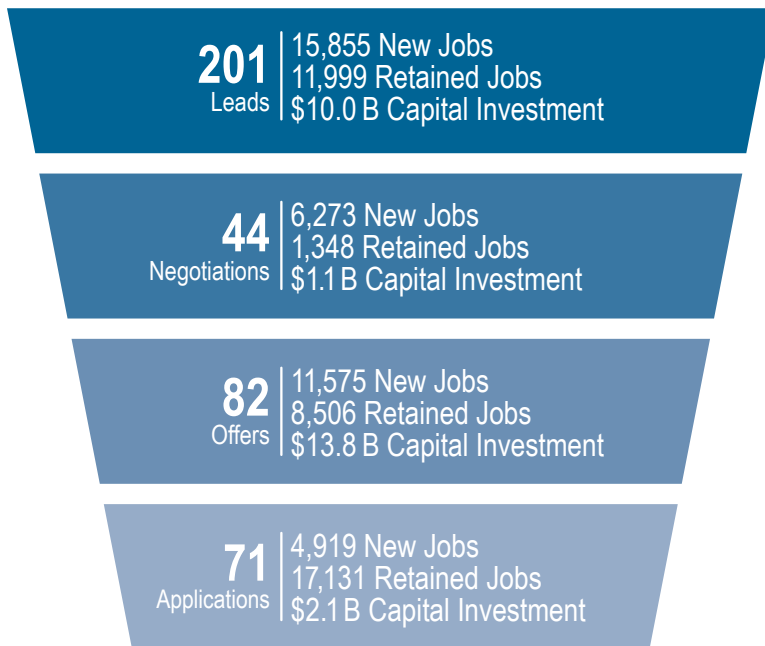
The JobsOhio project pipeline is a collaborative effort dedicated to helping companies achieve their goals in Ohio.

JobsOhio and its state, regional and local partners stay in lockstep on projects entering the project pipeline in order to drive job creation and capital investment.

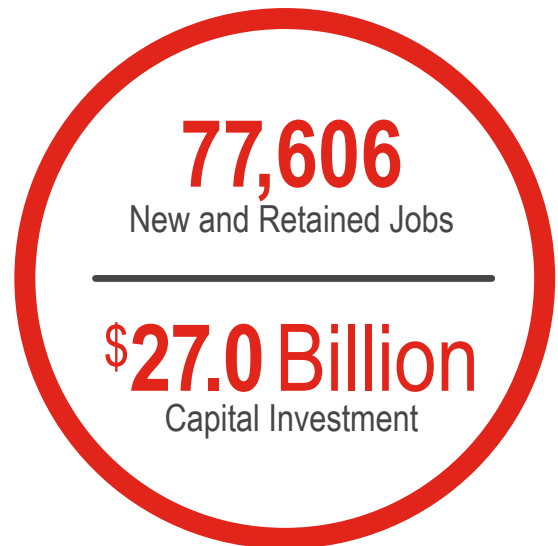
This network of partners stays connected with companies during project negotiations, which typically span 12 to 18 months. Rising trends and strategy development are derived from leads in the pipeline.

By the end of 2018, JobsOhio had moved the majority of opportunities through the pipeline, thereby achieving its best year in job creation and capital investment. Going into 2019, work is well underway to rebuild the pipeline through business development and marketing attraction activities.

Active Projects by Stage*



Total Project Pipeline*



Data as of December 31, 2018

* Potential results if all projects are realized.



A Culture of Excellence



Company culture is fundamental to JobsOhio's performance. Its culture is based on three key core values:

Act With Integrity

JobsOhio is honest and does what is right to build relationships, even when it is difficult.

Value People

JobsOhio respects relationships inside and outside of the organization to ensure successful outcomes.

Make a Difference

JobsOhio works with companies to help them reach their goals. In turn, their success improves the lives and communities of Ohioans.



JobsOhio Recognition

A commitment to transparency creates stronger relationships.

20 **JobsOhio is committed to the highest standards of integrity and transparency as it works to support business attraction, retention and expansion in Ohio.**



It's not just that JobsOhio gets results; the organization believes in achieving the results in the right way. In 2018, two outstanding organizations, GuideStar and the Ohio Association of Nonprofit Organizations (OANO), recognized JobsOhio for its high level of transparency.

In April 2018, **JobsOhio received the GuideStar Platinum Seal of Transparency, the highest level of transparency GuideStar recognizes.** Less than 1 percent of all organizations that apply for the seal receive it. As the nation's premier nonprofit database, GuideStar was founded to promote nonprofit transparency.

To reach the platinum level, JobsOhio submitted extensive data to our nonprofit profile on GuideStar, including financial information, qualitative information about goals, strategies and capabilities, and quantitative information about progress toward our mission of driving job creation and new capital investment in Ohio.

JobsOhio also earned the OANO's Seal of Excellence for successfully completing their rigorous Standards for Excellence® accreditation program. Organizations bearing the seal go beyond the minimum governance requirements.

JobsOhio opened itself to analysis by a "jury of peers" to merit this recognition. The peer review team examined our compliance with OANO's Standards for Excellence® Ethics and Accountability Code for the Nonprofit Sector in areas including: mission and program, governing body, conflict of interest, human resources, financial and legal, openness, and public affairs and public policy.

OANO evaluates fundamental values such as honesty, fairness, respect, trust, responsibility and accountability, all of which are inherently important in the nonprofit world and to JobsOhio.

JobsOhio proudly displays both seals on its website. These seals represent JobsOhio's dedication to integrity and openness while helping businesses succeed in Ohio.



Pilkington North America plant in Rossford, Ohio.

Expanded Production of Coated Glass in Ohio Supports the Growing Solar Market

"Our company has a rich tradition in the glass industry and strong roots in Ohio, and we are pleased to expand our U.S. glass manufacturing here."

Richard Altman,
regional director
architectural
glass and solar,
NSG Group

Pilkington North America is a subsidiary of Japan-based NSG Group, one of the world's largest manufacturers of glass and glazing products. Founded in 1918, NSG Group was transformed in 2006 with the acquisition of Pilkington, itself a global leader in the glass industry and the inventor of the float glass process. The company helped the Toledo area lay claim to its "Glass City" moniker with the alliance of its founding fathers Edward Drummond Libbey, Michael Joseph Owens and Edward Ford. In the late 1800s and early 1900s, these talented glassmakers formed separate and sizable companies, the Edward Ford Plate Glass Company and Libbey Owens Sheet Glass Company. Then, in 1930, the companies merged to form the Libbey-Owens-Ford Company.

Supporting a Customer's Big New Product

In February 2018, JobsOhio was contacted with an opportunity to compete for an investment. The project required a minimum of 100 acres with heavy utilities and rail access and was being driven by strong growth in the global solar market, which is forecasted to see a double-digit increase each year over the next three years. JobsOhio performed a site search along with the Regional Growth Partnership (RGP), a JobsOhio Network Partner, and local economic development officials.

The company was searching for a location to build a new float glass plant that would

produce coated architectural glass for First Solar's breakthrough solar panel product, the Series 6. This new plant would be NSG Group's first new float glass line in the U.S. in nearly 40 years and would support the company's long-term agreement with First Solar.

Moving Forward in Troy Township

Pilkington North America found potential in Wood County's Troy Township near First Solar, and the company plans to invest \$265 million in the project.

Troy Township's site allowed Pilkington North America access to rail and natural gas. However, in order for the project to move forward and stay in Ohio, JobsOhio provided much needed funding support to assist with the significant site development costs, including the existence of shallow, hard bedrock material, and infrastructure costs, utility improvements, and rail access improvements.

This project will create at least 150 new jobs with an average wage of \$23 per hour. Additional support will help the company with recruiting, hiring and training new workers to support the plant.





Rendering of the fully revitalized Urbana site.

A Community Unites to Revitalize Abandoned Site

An abandoned site can be a significant safety and financial liability to a community. Urbana's 605 Miami Street was just that.

Vacant since 2008, the once thriving manufacturing site became a community eyesore and was prone to persistent vandalism. But its prime location and existing utilities had too much potential for Urbana. The community sought out partners to revitalize the site, including much-needed financial support from JobsOhio.

A Major Undertaking

The former home of Q3 and Johnson Manufacturing had everything a company would want: space; nearby highways; proximity to major cities; current and future rail service; and existing utilities, including water, sewer, gas, and electric, thus making it an ideal site for revitalization.

Many companies were interested in the site, but costs to clean it up were a deterrent. The property needed an overhaul to eliminate the ongoing threats to public health, safety and the environment for it to be a viable site.

The Journey Back

Cleanup began in 2015, but the magnitude of remediation needed was beyond what Urbana could accomplish on its own. A collaborative including JobsOhio, Honeywell International Inc., the Dayton Development

Coalition, True Inspection Services, the Champaign Economic Partnership and the Champaign County Board of Revision was able to take the project to the next step.

Compelled by the potential for economic impact, JobsOhio committed almost \$890,000 from the JobsOhio Redevelopment Pilot Program toward demolition, environmental remediation, asbestos abatement, removal and disposal of waste, and site preparation.

After months of hard work, the remediation is almost complete and final permitting is anticipated to reach the Ohio Environmental Protection Agency by May 2019. Once received, the site will be marketed nationally to attract a new tenant. Because of Urbana's dedication to the site and the community, it successfully led a movement to turn an abandoned area into an economic opportunity.

To date, JobsOhio has committed over \$240 million in revitalization, leveraging an additional \$11 billion in capital investment and creating more than 15,500 jobs in Ohio. JobsOhio is committed to working with communities across Ohio to revitalize abandoned properties and return them to sources of job creation and economic growth.



JSW Steel USA announces investment in Mingo Junction, Ohio while at SelectUSA.

JSW Steel Invests in Southeast Ohio

"JSW is pleased to share its intention for additional investments in the U.S. market. It is our fundamental belief that due to the rich availability of scrap metal and abundance of natural gas, making steel through the EAF route is highly competitive in the U.S. from a global standpoint."

Parth Jindal, director of JSW Steel (USA) Inc.

The Mingo Junction mill in Southeast Ohio was built in 1872 and served as an anchor for the surrounding community. In the following years, the mill continued to evolve as a steel plant with various regional owners and with upgrades such as a 2.5 million-ton electric arc furnace (EAF). The plant was well-equipped for large production, but after 2009, subsequent owners utilized only a small portion of the mill.

In 2014, the mill's revitalization began when Asian Colour Coated Ispat Ltd. purchased the mill with the intent to return it to full capacity. The initiative to restore the plant involved a handful of collaborations which led to the creation of Acero Junction, Inc. (Acero).

An Opportunity for Growth

Acero began producing hot band coils and set its sights on restarting the EAF. Acero hired a team of 120 workers and committed to immediate and additional upgrades. Meanwhile, the plant's unique EAF and an upswing in U.S. market conditions caught the eye of India-based JSW Group, which saw the opportunity to grow in the U.S. Its American subsidiary, JSW Steel (JSW), acquired Acero to expand its product range and thus supply greater quantities of American melted and manufactured hot rolled coils.

However, as the new owner of the mill, JSW faced significant development costs from

facility neglect as well as workforce attraction and training concerns.

The Ohio Solution

In the spring of 2018, JSW officials met with JobsOhio, the Appalachian Partnership for Economic Growth (APEG) and the Jefferson County Port Authority, which stayed in lockstep during discussions and the negotiations to identify how to efficiently and effectively help the company.

JobsOhio offered JSW a revitalization grant to offset the high cost of redeveloping the plant. To fill additional positions, JobsOhio also provided funding support toward its talent acquisition efforts. JSW's new plant could employ as many as 400 people by the end of 2021 in a county with a high unemployment rate.

In December 2018, JSW fired up the Mingo Junction EAF for the first time in over nine years, reigniting both production at the facility and hope for the community.





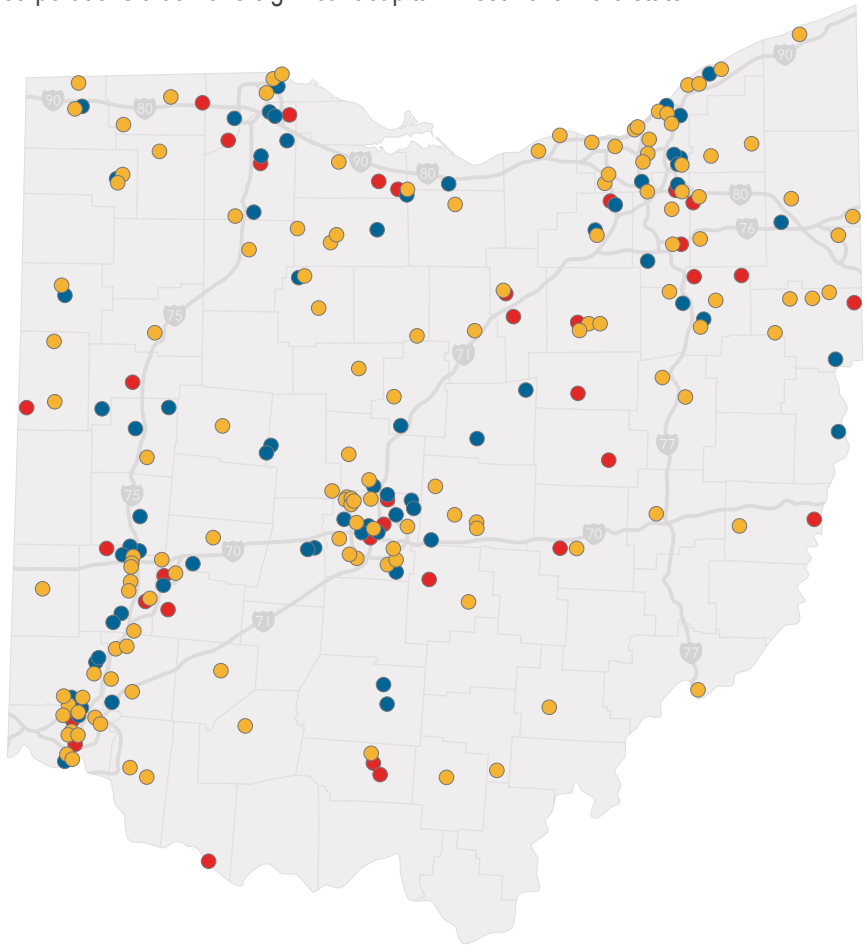
Working with Companies of All Sizes

APT Manufacturing Solutions in Hicksville, Ohio.

24 **For 2017 and 2018 combined, 78 percent of closed projects were with small businesses and middle-market firms.**

JobsOhio works to drive job growth and capital investment across the state because improving communities and the lives of Ohioans is essential to its mission. In recent years, the work JobsOhio has done with small and middle-market enterprises (SMEs) has accounted for a majority of its efforts. For 2017 and 2018 combined, 78 percent of JobsOhio's projects were with small businesses and middle-market firms. Supporting these SMEs is fundamental to JobsOhio's mission, just as is working with large corporations that make significant capital investment in the state.

- **Small Business** 39 Projects
Revenue < \$10 Million
- **Middle Market** 155 Projects
Revenue of \$10 Million - \$1 Billion
- **Large Corporations** 72 Projects
Revenue > \$1 Billion





Eccrine Systems, Inc. in Cincinnati, Ohio.

Eccrine Systems Grows Through Ohio Collaboration

"It's an exciting time to be at Eccrine as we innovate, grow and prepare to launch our first product. We continue to hire engineers, scientists and clinical researchers for our lab as well as sales, marketing and product development professionals to support our commercial launch and expansion of our pipeline. Southwest Ohio is uniquely positioned to support our growth. This infusion of non-dilutive capital from REDI Cincinnati and JobsOhio accelerates our progress."

Dr. Gavi Begtrup, CEO, Eccrine Systems

Dr. Jason Heikenfeld of the University of Cincinnati and researchers at the Air Force Research Labs at Wright-Patterson Air Force Base in Dayton needed a non-invasive way to monitor the vital signs of Air Force personnel. They invented technology that led to the founding of Eccrine Systems in 2013. The company is developing non-invasive, electronic wearable systems that measure and transmit real-time data about the body using sweat.

A Fast-Growing, Revolutionary Company

Eccrine Systems was founded to commercialize technology and intellectual property that was exclusively licensed from the University of Cincinnati, with funding support of CincyTech. Currently located in the Hamilton County Business Center, Eccrine Systems has been able to attract highly technical talent for research and development (R&D) as it has grown to over 50 employees.

As interest increased, Eccrine Systems needed more resources to accelerate the development and launch of its sweat-sensing technology.

Statewide Support

Surrounded by state, regional and community support, Eccrine Systems will expand its R&D capabilities in Southwest

Ohio, a region that has assisted it from a seed-stage company to an emerging market leader. The collaboration of surrounding partners and a strong startup ecosystem will help the company continue to scale and develop its game-changing technology.

In cooperation with its regional partner, REDI Cincinnati, JobsOhio is helping Eccrine Systems get to market. JobsOhio is supporting the expansion with a \$400,000 JobsOhio Economic Development Grant. The company expects to add 50 new jobs, doubling in size over the next three years.

Eccrine Systems is a real-life story of Ohio's prevalent culture of collaboration. Through the combined efforts of universities, private entities and funding sources, small companies like Eccrine Systems can research, discover, make and commercialize solutions that improve health and wellness for millions of people.



Eccrine Systems, Inc.



Ohio's Strong Foundation



27

Growth begins with a strong foundation. For generations, Ohio has touted numerous and diverse economic strengths. With the help of JobsOhio and its partners, these strengths have endured, and new areas of opportunity have been identified. Whether it's technology, thought leadership or the evolution of next-generation industries, Ohio has a foundation that sets the stage for companies of all sizes across multiple industries to continue on the path of success.



UNITED GRINDING
in Miamisburg, Ohio.

28 **During the creation of JobsOhio, a business-minded approach was taken to prioritize how the organization would work for the benefit of the state.**

A Diversifying Economy

Under the guidance of the board of directors and third-party strategic insights, JobsOhio was designed to have a proactive business development model and a return on investment approach to investment decisions. The initial focus included manufacturing, automotive and food processing – industries that represent Ohio's historic strengths. While protecting the base of Ohio's economy, the leadership team also recognized that there were growth industries in which Ohio could, and must, compete, including technology and healthcare. Altogether, nine industries were identified as the foundation on which JobsOhio would pursue economic growth.

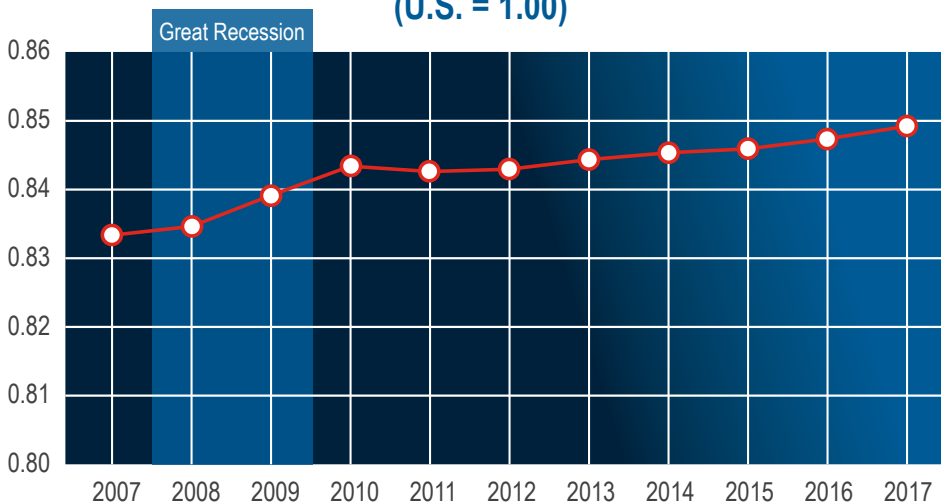
Ohio's increased industry diversity, as referenced in the chart below, is driven by strategy around the inclusion of growing industries including professional and business services, finance, insurance and healthcare. From 2007 to 2017, Ohio's economy witnessed a shift from manufacturing sector to services-providing industries like professional and business services, finance, insurance and

real estate, education and healthcare. JobsOhio has played a role in helping promote diversification of the economy by proactively attracting businesses to the state. **In 2007, Moody's ranked Ohio tenth among U.S. states in terms of industrial diversity. By 2017, Ohio had improved to eighth. As innovative companies like BrightEdge, Facebook, Quotient, Upstart, Veeva Systems and others invest in Ohio, JobsOhio is optimistic that the economy will continue to diversify.**

Historically, these businesses may have located on one of the coasts where large numbers of technology and healthcare organizations have established headquarters and operations.

Today, company executives are taking note of the changes happening in Ohio. With a balanced budget, a pro-business tax climate, low operations costs, a skilled workforce and JobsOhio's flexibility to build customized solutions to meet companies' needs, Ohio is on the radar for companies and growth industries and is part of the national conversation about economic diversity and jobs of the future.

Industrial Diversity Index in Ohio (2007-2017)
(U.S. = 1.00)



Industrial Diversity Index measures how close the regional economy mirrors the U.S. economy, and it varies between 0 to 1.

"Professional, financial and health services will remain the key growth drivers for the state."

Moody's



Clinical manufacturing facility at Nationwide Children's Hospital in Columbus, Ohio.

The Research Institute at Nationwide Children's Hospital Spins Off Groundbreaking Gene Therapy Companies

The resources and expertise of Ohio's renowned research and healthcare institutions drive discoveries that could improve millions of lives.

Nationwide Children's Hospital in Columbus, Ohio, is one of the leading pediatric hospitals in the nation. In 2017, the hospital had over 1.4 million patient visits from all 50 states as well as 48 countries. Its nonprofit research entity, the Research Institute, is a top-funded pediatric research institution with more than 1,300 employees and investigators. The Research Institute at Nationwide Children's Hospital occupies over 500,000 square feet of dedicated space and has 15 multidisciplinary Centers of Emphasis, one of which is the Center for Gene Therapy.

The Center for Gene Therapy has grown rapidly since the early 2000s. Nationwide's leadership, including Dr. John Barnard, president of the

Research Institute, Dr. Jerry Mendell, principal investigator in the Center for Gene Therapy, and Dr. Brian Kaspar, a former member of the center, have advocated for the continuation of research over the years. Today, these individuals are some of the most influential minds in gene therapy.

In addition to basic science expertise, the Research Institute has the internal infrastructure and resources to support translation. In particular, a Good Manufacturing Practice (GMP) facility, built in 2010, has in-house regulatory services to engage the Food and Drug Administration as well as a fully integrated clinical research services team which make it possible to take discoveries from bench to bedside.

A tipping point for the Center for Gene Therapy came in 2013 when AveXis, one of its promising startups, began clinical trials. Data from the therapy's success led to the company's acquisition by Novartis in 2018 for \$8.7 billion. Since then, the Research Institute has spun out four additional gene therapy companies and won the attention of leading biotechnology companies, solidifying its role as a leader in gene therapy.

The dedication to improving the lives of children and their families fueled Nationwide Children's Hospital toward becoming a global healthcare leader.

➤➤➤ The continued success from the Center for Gene Therapy has produced five startups, including **AveXis**, along with other partnerships and licensing deals:

- **Myonex Therapeutics Inc.:** Focuses on rare genetic diseases, including the first treatments for limb-girdle muscular dystrophy (LGMD). Sarepta Therapeutics Inc. partnered with Myonex Therapeutics by investing up to \$105 million and has an exclusive option to acquire the company.
- **Abeona Therapeutics:** Develops gene therapy for potential treatment of individuals with rare diseases, including lysosomal storage diseases.
- **Celenex Inc.:** Pursues treatment for rare, fatal neurological conditions. Amicus Therapeutics Inc. acquired the company last September with an upfront payment of \$100 million.
- **Milo Biotechnology:** Advances therapies that increase muscle strength and improve the lives of patients with muscular dystrophy.



**NATIONWIDE
CHILDREN'S**

When your child needs a hospital, everything matters.™



Strong Wage Growth Benefits Ohioans

Foundation Software in Strongsville, Ohio.

30 **Ask most executives why they choose to locate in Ohio and they'll likely tell you it is due to Ohio's talent who possess the proverbial Midwest work ethic: the ingenuity to creatively solve problems and the perseverance to see a solution get implemented.**

With a workforce of over 5.8 million, Ohio's skilled talent will be the foundation by which many organizations build their future.

JobsOhio recognizes the headwinds Ohio must address regarding slow population growth that much of the country faces, and steps are being taken to address such matters (see pages 40-41). However, there are notable gains that JobsOhio will build upon in the coming years.

Ohio gained more than 110,000 young professionals, between the ages of 20-34, from 2010 to 2018 which is the equivalent growth of Illinois, Indiana, Wisconsin, Kentucky and Alabama combined. Additionally, STEM workforce growth is up 19 percent, which is favorable to regional states as well as to the U.S. According to Michael Jones of the University of Cincinnati's Department of Economics, "Ohio's economic competitiveness can be strengthened through continued efforts to foster new business growth, innovation and increases in STEM talent."

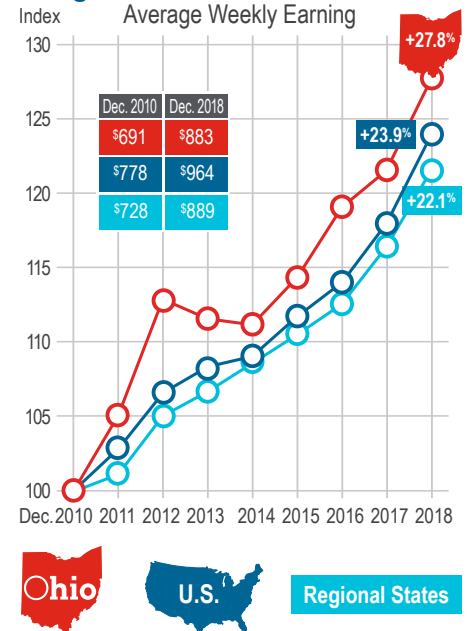
The private sector workforce in Ohio continues to see incomes growing faster than the U.S. and region. Private sector wage growth in Ohio can be attributed to a number of factors, including growth of jobs in new and emerging sectors, such as white collar jobs and a low unemployment rate.

"Young and Restless" Population Growth (Ages 20-34)

	Ohio	Regional States	U.S.
Young Professional Population Growth (2010-2018)	111,111	307,180	4,777,951
Young Professional Population Growth % (2010-2018)	5.1%	3.3%	7.6%

Source: U.S. Census Bureau
Regional States: IL, IN, KY, MI, PA, WV

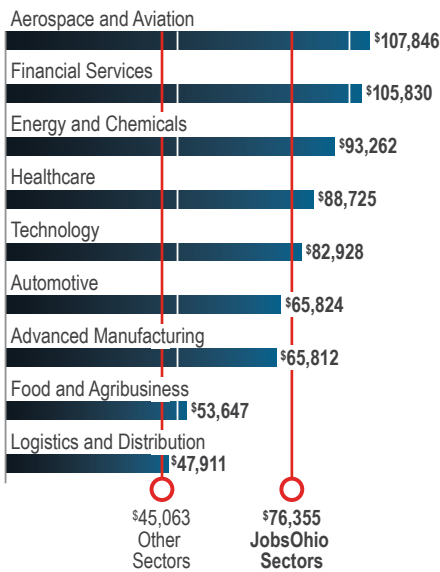
Wage Growth – Private Sector



Source: U.S. Bureau of Labor Statistics, CES
Regional States: IL, IN, KY, MI, PA, WV

With a continued diversification of the economy including growth in technology, financial services and healthcare jobs as well as upskilling of the manufacturing workforce to support emerging technologies, wage growth will be something to continue to monitor. In some regard, Ohio is catching up from years that trailed in relation to the region and state wages, but it would be remiss to discredit them given the progress that has been made in upskilling the talent and the jobs of the future.

2018 Average Wage – JobsOhio Sectors



Source: U.S. Bureau of Labor Statistics; Cleveland State University, Center for Economic Development

"High-paying professional and technical jobs continue to grow rapidly in Ohio, providing attractive opportunities for new graduates."

Michael Jones,
University of Cincinnati
Department of Economics

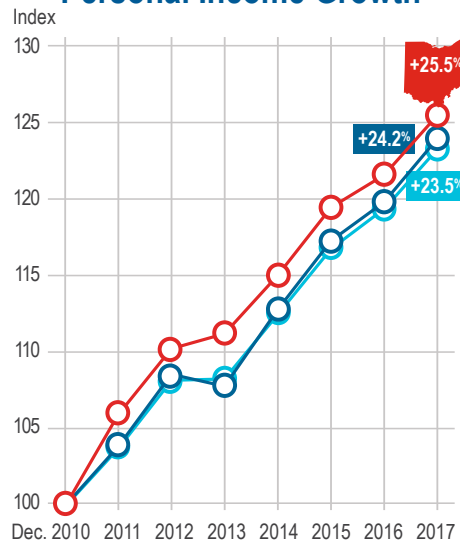
With wage growth comes a median household income and higher disposable income that lifts the overall economy in Ohio. The median household income in Ohio has increased 15.6 percent from 2010-2017 which significantly outpaces regional states and the U.S. Per capital



Hyland Software in Westlake, Ohio.

disposable personal income growth in Ohio exceeded the region and the U.S. over the last seven years increasing available income for spending.

Per Capita Disposable Personal Income Growth



Source: U.S. Bureau of Economic Analysis
Regional States: IL, IN, KY, MI, PA, WV

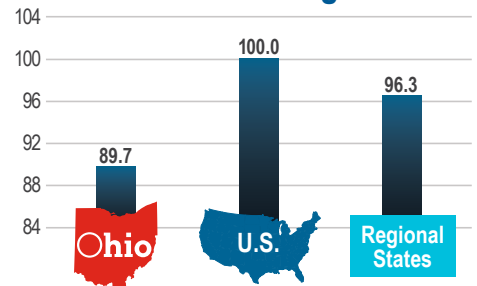
Further reinforcing the increase in available disposable income, Ohio's composite cost of living index was significantly lower than the national and regional average in 2018.

Ohio is an innovative state with a stable economy and welcoming communities. Its workforce is dedicated and loyal, turning Ohio's greatest asset into a company's greatest asset when they choose to invest in Ohio. With an affordable cost of living and growing wages, employees will enjoy a higher quality of life.

"Ohio ranks second in Forbes' quality of life metric thanks to low living costs, short commutes and a plethora of top-rate colleges and cultural and recreational opportunities."

Forbes

2018 Cost of Living Index



Source: Council for Community and Economic Research
Regional States: IL, IN, KY, MI, PA, WV



Next Generation Manufacturing

SelectTech in Dayton, Ohio.

32 By embracing the 3A's – advanced materials, automation and additive manufacturing – Ohio will continue to be one of the most advanced industrial economies globally.

Ohio's strength in manufacturing is integral to Ohio's economy and it is incumbent that the industry evolves as technology advances. Its ongoing prosperity will be predicated by a company's willingness to integrate technological advances that support a streamlined and cost-effective production model for improving output and optimizing factory operations.

The JobsOhio Advanced Manufacturing sector strategy is focused on emerging technologies that will have broad impact, helping companies understand how to best integrate new systems and processes into their factories to remain competitive.

Additive Manufacturing

Commonly known as 3D printing, additive manufacturing is an advanced manufacturing process where material is joined under computer control to create a three-dimensional object layer by layer. Additive manufacturing is having an impact across many sectors, including pharmaceuticals, medical, dental, food, aerospace and defense, and oil and gas.

Industrial Internet of Things (IIoT)

Automation is one of the largest opportunities for growth for manufacturers of all sizes. Industrial

internet of things (IIoT) is the use of the internet of things (IoT) to network industrial devices, which offers an environment ripe for companies ready to take their manufacturing processes to the next level. These technologies, which include sensors and software platforms, will impact how every product is designed, produced, marketed and delivered. IIoT will also impact the customer buying experience. Key sector opportunities include food, medical, consumer products, computer and electrical products, automotive and aerospace.

JobsOhio is proud to work with companies, such as Crown Equipment Corp. that drive advancement in the material handling equipment industry. Crown designs and manufacturers lift truck components and has integrated IIoT capabilities into its production. Read more about Crown and its advancements on the following page.

While manufacturing will continue to be a key element of the Ohio economy, JobsOhio is partnering with organizations across the state to offer thought leadership and support as companies explore new capabilities driven by technological advancements. These advancements also create additional job opportunities that span other sectors.



Airstream in Jackson Center, Ohio.



Crown Equipment Corp. in New Bremen, Ohio.

Crown Equipment and the Growth of Next Generation Manufacturing

Manufacturing is shifting to highly integrated, tech-based processes and equipment that enable greater efficiencies, improving productivity and operational assessment. Crown Equipment Corp. is the epitome of an industrial manufacturer making this shift. The New Bremen, Ohio, designer, manufacturer, distributor and service provider of forklifts and other material handling products embraces the change that technology triggers and seizes the improvements it presents.

Crown's Need to Expand

Crown Equipment is steeped in digitally enabled management, known as the industrial internet of things (IIoT), which allows it to collect, analyze and respond to data quickly, thereby facilitating improvements.

Increasing global demand for Crown Equipment's competitively appealing products influenced a much-needed expansion of its production capabilities.

Additionally, the company's high-tech processes require a skilled workforce. The optimal solution needed to promote speed to market and provide both an available workforce and long-term operational cost advantage.

Confidence in Ohio

Crown Equipment, knowing the benefits of the business climate and skilled talent in Ohio, chose to expand its operations in New Bremen. This decision allowed the company to make long-term, strategic facility investments and confidently reinvest in the reliable regional workforce.

A team from JobsOhio and the Dayton Development Coalition (DDC) worked with the company to fully understand its growth plans and location considerations.

The economic development network provided a tailored incentive package that included JobsOhio Talent Acquisition Services and a JobsOhio grant to support the purchase of machinery and equipment for expanding production capacity. A Job Creation Tax Credit from the Ohio Development Services Agency was also offered to support long term growth.

Crown Equipment manufactures in-house up to 85 percent of the components

included in final assembly as well as recycling and reusing materials. These aspects of production create a deep regional expertise in equipment manufacturing that could attract companies to the region and state, and create higher-skilled, higher-paying jobs.

Crown Equipment's expansion will strengthen its roots in New Bremen, where it is one of the largest employers in the region. The company plans to complete construction in 2019 prior to hiring in 2020 and be operating at full capacity by the end of 2022.



Ohio Technology Propels Business Forward

LISNR in Cincinnati, Ohio.

34 Thanks to a collaborative tech community, Ohio's businesses, institutions and educational organizations are on the cutting edge of a digital shift.

The integration of technology is a necessary evolution to be efficient, stay relevant and stay profitable. From healthtech to the internet of things (IoT), smart mobility and fintech, companies are adopting new technology and seeing success in Ohio. Companies in Ohio collaborate with each other, educational institutions and public and private entities to open joint innovation centers, spin off new ventures and pursue innovations. For example:

- **Kroger and leading British online grocer Ocado** are slated to augment Kroger's digital and robotics capabilities and extend its omnichannel reach.
- **The Cleveland Foundation, Case Western Reserve University and Cleveland State University** have formed an alliance around IoT.
- **Ohio's internationally recognized hospitals** have given rise to new companies using healthtech to detect heart disease early.

Ohio has a thriving technology environment made up of startups, Fortune 500 and 1000 companies, and everything in between. Some of these companies are completely dedicated to a tech solution, others are looking for ways to use tech to make some element of business better.

Take Ohio-based Kroger, for example. Today, the country's largest grocer does more than stock shelves; it is a leading practitioner of technology solutions. Services like order online with in-store pickup, "Scan, Bag, Go," and personalized digital coupons make shopping easier and more convenient for its customers. Additionally, Kroger's spinoff brands, Kroger Technology and 84.51°, are specifically dedicated to analytics and technology that improve the customer experience.

The alliance between Honda and the City of Marysville is another great example of a private-public partnership as well as smart technology collaboration occurring in Ohio. Honda and Marysville worked together to install connected vehicle technology at one of the city's busiest intersections. You can read more about this project on page 35.

Ohio is home to several diverse industries. Whether it is agribusiness or financial services, energy or logistics, companies are making the digital shift to stay relevant. As tech-savvy companies continue to evolve, no matter their goals, they are finding the resources and supportive environment in Ohio to make it happen.



Case Western Reserve University in Cleveland, Ohio.



Smart technology senses a pedestrian in Marysville, Ohio.

Honda and Marysville Bring the “Smart Intersection” to Life

In 2018, Honda partnered with the City of Marysville to debut a smart intersection that demonstrates the connected technology of the future.

A key benefit of smart mobility technology is its ability to improve safety.

Ohio has invested millions of dollars into cutting-edge testing facilities and related programs to encourage the development of technologies that will be part of the automotive industry’s future. Likewise, companies have also invested millions into autonomous and connected technologies that allow vehicles to communicate across an integrated network.

In 2018, Honda partnered with the city of Marysville to debut a smart intersection that demonstrates the connected technology of the future. The vehicle-to-infrastructure communication allows vehicles to virtually see through walls, buildings and other vehicles to help drivers detect and avoid potential crashes. The system features four cameras mounted above four traffic signals on each corner of the intersection. The cameras capture live video of all road users.

Honda’s proprietary object recognition software processes that information and analyzes it for threats, such as approaching emergency vehicles, cars running a red light or people stepping into the street. When a vehicle equipped with vehicle-to-everything (V2X) technology approaches a potential problem, the system uses audio signals and visual alerts projected on a small screen on the windshield to warn the driver.

Deploying this type of technology expands drivers’ awareness of their surroundings, ultimately saving lives.

Honda has long been committed to Marysville and Ohio, where the company employs more than 15,000 associates who work at five manufacturing facilities, logistics operations, support offices and Honda’s second-largest research and development facility in the world. Honda’s partnership with Marysville is part of the 33 Smart Mobility Corridor, a 35-mile stretch of U.S. Route 33 in Central Ohio where the state is investing \$15 million to install advanced highway technology.

Ohio has an unparalleled mix of resources that make it a living laboratory for researchers, developers and manufacturers to design, test and deploy autonomous and connected vehicle technologies.

HONDA



Ohio's Focused Future

A rendering of the new CoverMyMeds campus in Columbus, Ohio.

Ohio's Focused Future



37

A foundation of experience and insights gained along the way set the stage for JobsOhio to focus on the future. In collaboration with numerous partners, JobsOhio will continue its mission to accelerate Ohio's growth while focusing on key enablers to address areas of opportunity. This year, the insights gained from work with McKinsey & Company aided the development of key priorities that will move Ohio forward.



JobsOhio Named Best in Class

JobsOhio is a high-performing organization with top-tier outcomes.

38 In early 2018, in accordance with JobsOhio's commitment to governance and transparency, the JobsOhio board of directors selected McKinsey & Company to complete an independent performance assessment of JobsOhio.

McKinsey conducted an extensive, objective and data-driven review and analysis of JobsOhio's outcomes related to wins, jobs created, capital investments and payroll, as well as JobsOhio's internal processes, organizational structure, health and talent. In addition to information provided by JobsOhio, McKinsey reviewed independently gathered data and unaffiliated third-party interviews. JobsOhio was then evaluated based on comparative peer economic development organizations (EDOs) and the overall condition of the Ohio economy.

The report compared JobsOhio to regional peers and to a set of 17 states with whom JobsOhio regularly competes – referred to as “all peers” throughout the assessment.

McKinsey found that JobsOhio “consistently performed at or near the top five of all peers across core performance indicators,” including number of wins, jobs, capital investment and payroll.

JobsOhio's “unique legal construct” plays a role in its effectiveness. “While other legal constructs can also achieve high levels of performance, JobsOhio's current operating model is inextricably linked to its legal structure,” McKinsey said in the report.

As a private entity, JobsOhio's advantages over other EDOs “include: funding stability; operating flexibility (hiring, procurement, etc.); overall governance; and the ability to set and keep strategic priorities,” the report continued.

JobsOhio was also recognized as a “leader in data transparency and information availability.” JobsOhio consistently reports core performance metrics (quarterly or annually), which sets it apart from other EDOs in reporting on projects across the deal pipeline. JobsOhio is one of very few peer EDOs that report consistently on actual results versus commitments.

McKinsey also posed three questions for JobsOhio to consider for further improvement. You can read more about them and how they are being utilized by JobsOhio on pages 39-41.

McKinsey concluded, “It is apparent from the data that JobsOhio is a high-performing economic development organization with top-tier performance outcomes in support of its mission. JobsOhio has achieved these outcomes in a relatively challenging overall economic environment in Ohio and throughout the Midwest.”

The full report is available on the JobsOhio website at www.jobsohio.com. It can be found on the “About JobsOhio” page under the title “Independent Performance Assessment of JobsOhio.”

JobsOhio's Five-Year Aspirations (2019-2023)

2018 marked the fifth year JobsOhio operated with independent funding through the liquor enterprise.

In order to continue offering best-in-class service to companies, JobsOhio dedicated a portion of 2018 looking inward at its performance since 2013, highlighting where its model is working while looking for opportunities to chart further progress over the next five years. As part of this analysis, JobsOhio hired McKinsey & Company to conduct an independent performance assessment (IPA) of its performance and operating model, which was published in June 2018. The IPA posed strategic questions that JobsOhio should address, specifically:

- What larger investments can offset some of the headwinds facing Ohio's economy?
- What strategic initiatives (within target industries and cross-cutting areas) are needed to meet critical customer needs?
- How can JobsOhio use its flexible and well-resourced platform to creatively attract more innovative companies to Ohio aligned with strategic priorities?

Using these questions as a prompt, McKinsey worked hand-in-hand with the JobsOhio strategy team, JobsOhio Network, and partners to identify new five-year aspirations for the Ohio economy and how JobsOhio – as the lead economic development organization for the state – can enable them across the nine targeted industries.

- **Accelerate Ohio's growth.** Over the next five years, Ohio aims to become a leader in job, income and investment growth, achieving the highest growth rate among Midwest states and becoming one of the top 10 states in the U.S. in terms of growth.

JobsOhio, which focuses its efforts on nine targeted industries that collectively comprise 25 percent of total private sector jobs in Ohio, will support this ambition. It will serve as the driving force behind new economic momentum by developing the road map for top 10 job creation and wage growth and collaborating with state, regional and local partners to achieve such performance.

- **Enable shared prosperity.** With a goal to have all six of Ohio's regions experience positive job and wage growth, JobsOhio will partner with its regional and local stakeholders and economic development organizations (EDOs) to support regional prosperity and growth.
- **Improve Ohio's resilience.** Ohio will have a share of resilient industries, those that are able to maintain their gross domestic product (GDP) growth through all business cycles and are above the U.S. average. JobsOhio will focus attraction efforts and resource allocation to more resilient (and less cyclical) sectors, increasing the state's share of industries that maintain GDP growth through all business cycles.
- **Enhance state brand and competitiveness.** Ohio will improve its competitiveness in talent, innovation, infrastructure and brand awareness to address its target sector company needs. To enhance the state's brand and competitiveness, JobsOhio is exploring an initiative to improve the perception of Ohio by adding high-skilled STEM talent, creating jobs through innovation districts and attracting high-growth, scale-up companies. Efforts will include considering projections related to urban vibrancy, training a middle-skilled workforce and increasing the inventory of authenticated sites.

- **Make Ohio a leading state for business.** Ohio will improve its attractiveness to businesses and become the most attractive state to do business within the region and one of the top 10 in the U.S. JobsOhio seeks to be recognized as a top EDO globally through best-practice company attraction activities and leadership in programs that enhance state economic competitiveness.

By supporting these five aspirations, JobsOhio further demonstrates the ways it differentiates itself from the competition. By employing sound strategies and taking smart, calculated risks, JobsOhio and its economic development partners across the state will continue to drive job creation and capital investment in Ohio. One of JobsOhio's values is to "Make a Difference," and when it makes a difference, customers thrive and Ohio strengthens.

JobsOhio will partner with its regional and local stakeholders and economic development organizations to support regional prosperity and growth.



Building Ohio's Economic Enablers

Ohio's strengths have contributed to significant growth.

40 As part of a strategy exercise that concluded in late 2018, JobsOhio dedicated significant effort to look at the broader U.S. and Ohio economic performance.

The initiative included engaging a broad set of stakeholders, including executives, employer groups, and economic development partners. As part of that effort, JobsOhio looked historically and prospectively about where the U.S. is likely to create jobs, Ohio's competitive strengths and weaknesses, and what Ohio – and JobsOhio – could do in partnership to achieve the balanced ambitions of: job creation, capital attraction, regional prosperity, economic resilience, and an improved business brand.

Strategy Insights

Ohio has achieved historic economic performance since 2011, outpacing the national job growth rate and closing the gap with top states. Over 570,000 new jobs were created in Ohio, with JobsOhio helping companies who have pledged to create nearly 170,000 jobs.

However, with the U.S. economy expected to grow at a slower pace in 2019, new capital investments will likely also be on the decline. With fewer deals overall, states and localities will have to work harder and smarter to find and attract new investment.

After the best year in JobsOhio's history in 2018, the first order of business for 2019 is to rebuild the pipeline of prospective deals to increase the number of

opportunities in which we compete for new investment. Building the pipeline is done in collaboration with our international, local and regional partners.

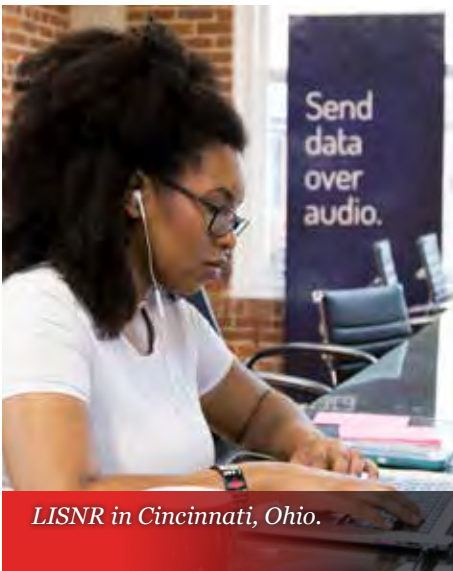
Ohio also faces its own unique headwinds that puts the gains achieved over the last several years at risk. Among these challenges are projected slower growth in population and employment, an unfavorable industry mix that lacks its fair share of knowledge-based sectors, and uneven growth across the state. To address these challenges, JobsOhio will seek out bold new strategies that address these economic headwinds and ensures sustained positive performance for Ohio.

2019 Strategic Initiatives:

Winning the Talent War

The U.S. is facing a labor shortage and Ohio is no exception. As the seventh-largest state in the country, Ohio has an advantage with the size of its population; however, size alone is not enough. Ohio must increase production of highly skilled talent in science, technology, engineering and math (STEM) to meet the needs of the new economy for both existing and future employers.

JobsOhio will work with the State of Ohio, under the leadership of the new Gov. Mike DeWine and Lt. Gov. Jon Husted,



LISNR in Cincinnati, Ohio.

to bolster Ohio's talent pipeline and address the skills mismatch. A central component of the strategy of JobsOhio will be to partner with our sector companies to identify their biggest technology skill gap and partner with public and private partners to build a strategy to address this gap, which will require upskilling and reskilling Ohio's labor pool. This strategy will address technology upskilling for growing innovation, as well as building middle-skill level supply gap; those that require more education and training than a high school diploma but less than a four-year college degree.

Improving Innovation Outcomes

Ohio's universities and corporations spend less on research and development (R&D) than its peer states, which leads to lower commercialization rates of statewide R&D. To address this, JobsOhio introduced the Research & Development (R&D) Center Grant program in 2016 with the goal of catalyzing more corporate innovation in Ohio's targeted and emerging industries. This program has supported 18 new investments leveraging \$340 million in new R&D across Ohio; however, it hasn't closed the gap with our peers. In addition, Ohio's share of entrepreneurs and young companies is below the U.S. average and has decreased over the past 10 years. These gaps in Ohio's innovation ecosystem must be addressed to continue expanding in high growth industries.

Ohio must define the future vision of the innovation environment by promoting and attracting more startups and scale-ups across the state. In order to make Ohio the most attractive Midwest state for fast-growing, young companies, JobsOhio will take a targeted approach by offering easy access to capital and incentives that meet the needs of their growing businesses and landing zones that foster innovation. By teaming up with local and regional partners, JobsOhio will support growing innovation districts where there are strong university-business linkages and large anchor companies that foster R&D and commercialization.



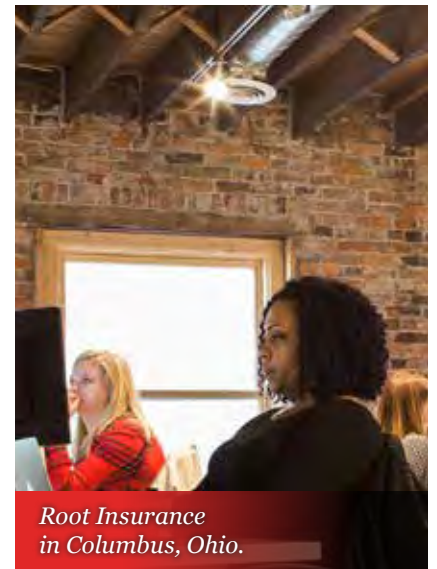
Airport South Commerce & Tech Park groundbreaking in Whitehall, Ohio.

Supporting Sites and Place-Based Development

One of the keys to winning new location and expansion opportunities is a healthy supply of development-ready sites. The JobsOhio Revitalization program and SiteOhio have supported development and authentication of properties across the state to ensure they are clean sites with the necessary infrastructure to be construction ready on day one. However, there is more work to be done.

JobsOhio plans to increase the inventory of ready sites in 2019. Partnership with communities, utilities and developers will continue to be leveraged to take on prospective developments in strategic locations around the state.

Quality of place is also an important site selection location factor and is increasing in relevance as the labor pool continues to shrink and people have a choice of where to work. Creating a desirable environment where knowledge workers want to live, work and play must be a part of our overall economic development strategy to remain competitive. JobsOhio will seek to support local initiatives that create a high performing, innovation ecosystem designed to attracting high growth startups and catalyze private investment through opportunity zones, anchor assets, infrastructure and cleanup efforts in high-need and impact neighborhoods.



Root Insurance in Columbus, Ohio.



Kadant Black Clawson in Lebanon, Ohio.

JobsOhio Differentiators



43

JobsOhio has a unique business model, giving it the ability to work with, and respond to, companies in ways that other state-level economic development organizations cannot. Since its start in 2011, JobsOhio has had a positive impact on Ohio's economy through the work it does to attract and retain jobs as well as through capital investment.



Built for the Long Term and Focused on Relationships

thyssenkrupp Bilstein of America, Inc. in Hamilton, Ohio.

44 JobsOhio has nine differentiators that set it apart from all other economic development organizations.

1. Long-term commitment
2. Relationship approach
3. Strong partner network
4. Experienced team
5. Flexibility
6. Creativity
7. Ability to move at the speed of business
8. Performance-driven philosophy
9. Focus on the return on investment (ROI)

Long-Term Commitment

This model makes it easier for JobsOhio to build the relationships that help companies prosper in Ohio. For example, JobsOhio can offer loans, grants and other forms of financial support that aren't subject to the constraints of a two-year state budget cycle.

thyssenkrupp Bilstein of America, a subsidiary of Germany-based thyssenkrupp, expanded its Hamilton, Ohio, headquarters three times since 2011. JobsOhio has been a constant partner to the company, each time offering funding assistance to offset costs to grow and hire talent.

As a private nonprofit company, JobsOhio's long-term funding structure is designed to help companies throughout economic downturns. It provides companies with stability and predictability, and allows JobsOhio to support projects seamlessly whereas other state budgets may be

constrained. JobsOhio is an enduring and continuous partner in business.

Relationship Approach

Successful business is built on strong relationships. For JobsOhio, building and maintaining relationships with the companies it serves is a priority. Other state-level economic development organizations often disconnect from companies after projects conclude. JobsOhio, on the other hand, maintains its commitment to companies from their initial investments and as they grow.

Companies have praised JobsOhio for its responsiveness and exceptional customer service. Pillar Technology, for example, is a technology solutions provider that was started in Ohio and continues to make investments in its home state. Not only has the company identified Ohio as an enabler to its success, it has also recognized JobsOhio for maintaining communication and responding quickly to its inquiries.

JobsOhio doesn't just say it values the companies it works with – it practices maintaining relationships. By treating every inquiry as important as the company does, JobsOhio helps companies understand their worth in Ohio.



*Pillar Technology Group LLC
in Columbus, Ohio.*



Lubrizol Ribbon Cutting in Avon Lake, Ohio.

A Collaborative Network, an Expert Team

Ohio's economic development efforts are carried out by a collaborative network made up of JobsOhio at the state level, six regional partners across the state and hundreds of local economic development entities.

»»

Guided by an average of 20 years of industry experience, these leaders open doors to deeper and broader industry connections including resources, organizations, academia and corporate partners.

»»

Strong Partner Network

Each of JobsOhio's partners has its own resources and responsibilities, and together they ensure that business needs are met.

JobsOhio's internal team and its external network form a collection of resources and people that executives can trust when making decisions in the best interest of their companies. This collaborative, knowledgeable team serves as a guide and resource for companies investing, or already invested, in Ohio.

Cleveland-Cliffs Inc., a major supplier of iron ore pellets to North American steelmakers, started construction on its first hot briquetted iron production plant near Toledo in early 2018. The project was a major milestone for the company. For over a year, JobsOhio, the Toledo-Lucas County Port Authority, the Regional Growth Partnership (RGP), the city of Toledo and other local stakeholders partnered to support the project. Because of their commitment, the investment finally came to fruition.

Experienced Team

Within JobsOhio is a unique leadership team made up of professionals who oversee strategy for Ohio's nine key industries. These professionals have

over 200 years of combined industry experience. JobsOhio is the only state economic development organization to have a team of designated industry experts available to companies.

Guided by an average of 20 years of industry experience, these leaders open doors to deeper and broader industry connections such as resources, organizations, state agencies, academia and corporate partners. Companies can rely on these allies to serve as their go-to for industry insight both inside and outside of Ohio.

Working with the JobsOhio expert team can help companies navigate the space and overcome problem areas. The energy leadership team, for example, understands all aspects of Ohio's energy business environment. When companies seek to build a facility, but discover the price of gas seems high, it deters them. JobsOhio steps in to analyze the company's need and look for alternatives within the desired price range by working with our utility partners. Each JobsOhio leadership team deploys the same level of knowledge and expertise for every situation, making them a trusted resource when companies need them.



Unique Solutions, Better Start-to-Finish Efficiency

Nanogate Jay Systems in Mansfield, Ohio.

46 Making an investment is a large undertaking that can sometimes require an expedited process.

Flexibility and Creativity

While there's no one-size-fits-all approach to investing, JobsOhio works to guarantee that a tailored solution is identified and pursued efficiently. In partnership with its six regional partners, JobsOhio listens to companies and identifies their specific needs in order to create a customized solution in Ohio. This streamlines the project process and limits revisions to the deal, thereby increasing the speed at which the company can begin operations.

AxoGen Inc. sought to expand its U.S. footprint with a new lab and production facility. It identified Ohio as a location with ample, much-needed biomedical and engineering talent, but the state was not on the top of the list. JobsOhio and the Dayton Development Coalition (DDC)

worked together to create a unique solution tailored to the company's every need. Their collaborative solution won Ohio the investment.

Ability to Move at the Speed of Business

JobsOhio practices customer-focused efficiency. Through relationships and its business model, JobsOhio can help customers get from a project's start to its finish faster.

JobsOhio has close relationships with many organizations across Ohio, and these relationships facilitate an even faster way of doing business. For example, JobsOhio works closely with the Ohio Environmental Protection Agency (OEPA) to help businesses obtain environmental permits at a faster pace. Per statutory obligation, permits must be processed within 180 days after receipt of a complete permit application.

Sofidel, based in Italy, planned to build a 1.7 million square-foot tissue paper manufacturing plant in the U.S. In order to meet customer demand, the company had a very tight timeline. Already behind schedule, Sofidel needed a fast permit approval to get the project on track. JobsOhio connected Sofidel to the OEPA, which was able to process the environmental permit in the 180-day timeframe.



Sofidel in Circleville, Ohio.



Dana Incorporated in Toledo, Ohio.

Pursuing Projects That Benefit Ohio

JobsOhio analyzes every proposed investment along multiple dimensions before it offers to support a project.

»»

When combined, JobsOhio's nine differentiators play a major role in the success of companies investing in Ohio and, ultimately, result in a positive benefit for Ohio's economy.

»»

Performance-Driven Philosophy

By evaluating a project's potential economic impact, JobsOhio works in the best interest of Ohio.

Along with making strategic decisions regarding investments, JobsOhio holds companies accountable to deliver on their commitments. Both parties enter into a partnership that is mutually beneficial. JobsOhio focuses on the project metrics and measures the performance of companies and their commitments. If they do not keep their commitments, JobsOhio may reclaim funding.

Focus on the Return on Investment (ROI)

Before a company can receive funding support, JobsOhio evaluates the return on investment to Ohio. As a business itself, JobsOhio takes a strategic approach to investments in order to ensure that all projects benefit the state. JobsOhio invests funds in projects that will have a positive impact on Ohio and promise long-term, in-state growth and good-paying jobs for Ohioans.

Many of the companies that JobsOhio supports are impactful to the community and region where it is located, as well as the industry it is a part of. Smart investments bring about greater potential

for community improvements through capital investment and new payroll. Better communities attract and retain quality workers and other companies with the potential to have additional positive impact.

When combined, JobsOhio's nine differentiators often play a significant role in the success of attracting investment in Ohio and, ultimately, result in a positive benefit for Ohio's economy. Companies can rely on JobsOhio to be a partner for the long term. Through a network of partners and industry experts, JobsOhio gives companies top-notch guidance to support their growth. JobsOhio is flexible and fast moving, going above and beyond to take care of companies. The partnership is mutually beneficial because when companies thrive, so does Ohio.



Corporate Governance

JobsOhio goes above and beyond for Ohio.

48 **JobsOhio is delivering results with responsibility and accountability above the standard.**

Corporate governance is the framework of rules, practices and processes by which an organization is directed and controlled. This framework ensures that organizations are held to the highest standards when working in the best interest of its stakeholders.

Guided by an independent board of directors, JobsOhio employs corporate governance best practices when carrying out its mission of increasing capital investment and driving job growth in Ohio. JobsOhio holds itself to the highest standards of accountability, transparency, integrity and ethical conduct. Strict policies and procedures are applied consistently throughout the organization to ensure JobsOhio follows responsible business practices. The JobsOhio team exemplifies care in its behavior between internal associates, clients and the partners with whom JobsOhio works.

Ethics and Integrity

JobsOhio employees and board members adhere to stringent rules, procedures and reporting requirements and sign an annual

JobsOhio Ethical Conduct Pledge, which covers two principle policies:

- 1. The Standards of Conduct policy**, which requires all employees to perform their duties with the highest ethical conduct, and
- 2. The Conflict of Interest policy**, which protects the interests of JobsOhio when it is involved in a transaction that could financially benefit the private interest of a director, officer or employee.

JobsOhio conducts annual ethics and compliance training for its employees and board members. In addition, an open-door policy and a hotline are available to employees should ethical issues arise.

Transparency and Accountability

As a private nonprofit corporation, JobsOhio provides substantial transparency into its operations and activities, including the following information:

- Conflict of Interest and Standards of Conduct policies
- Annual ethics presentation
- Annual audited and quarterly reviewed financial statements
- Monthly reporting of executed grant and loan agreements with companies investing in and committing jobs to Ohio
- Independent compliance and control review

JobsOhio complies with all statutory reporting and oversight requirements. JobsOhio then voluntarily goes above and beyond these requirements. A nationally recognized firm of independent, certified public accountants conducts an annual audit of the corporation's financial statements. This firm also completes an annual Compliance and Control Review, which examines ethical standards, expense reimbursements, payroll, project review procedures, board operations and other oversight matters, following procedures approved by Ohio's Auditor of State. In fiscal year 2018, the Compliance and Control Review resulted in no material findings.

Additionally, JobsOhio provides public reports to the following state and federal agencies:

- Ohio Development Services Agency
- Ohio Ethics Commission
- Internal Revenue Service
- Ohio Auditor of State
- Ohio Controlling Board

JobsOhio's adherence to the highest standards of integrity, ethics, accountability and transparency gives stakeholders confidence that it operates in the best interest of Ohio.

JobsOhio Board of Directors and Independent Review Panel

JobsOhio operates under the guidance of an independent board of directors and an independent review panel (IRP) that evaluates all economic development projects under consideration for support.

These leaders set the direction by which the organization operates to attract and retain jobs and capital investment in Ohio.

Board of Directors

The JobsOhio board of directors is composed of nine proven leaders from some of America's most successful organizations. Their broad experience in management, fiscal responsibility and corporate governance, as well as their diverse perspectives and relevant industry experience, benefit JobsOhio in its mission to drive job creation and capital investment in Ohio.



James C. Boland
Board Chairman
Retired Vice Chairman,
Ernst & Young
Former President, CEO
& Vice Chairman,
Cavaliers Operating
Company



John F. Minor, Jr.
President & Chief
Investment Officer,
JobsOhio



Dr. Jerry Sue Thornton
CEO, DreamCatcher
Educational Consulting
Service



William G. Batchelder
Chairman Emeritus,
The Batchelder Company
Former Speaker of the
Ohio House



John J. Bishop
Board Member &
Executive Committee
Chairman, The Motorists
Insurance Group



Stephen E. Markovich, MD
Executive Vice President,
OhioHealth
Assistant Adjutant General,
Ohio Air National Guard



Lawrence J. Kidd
Principal & CEO,
Reliable Staffing
Services and RSS
Professional, LLC



Thomas L. Williams
President & CEO,
North American Properties

Independent Review Panel

The IRP is comprised of individuals who have experience in business, finance, investment management and economic development. This group reviews all proposals for JobsOhio grants and loans to companies and evaluates and assesses the appropriateness and effectiveness of the financial assistance that JobsOhio provides. The IRP also ensures that project decisions are free from potential conflicts of interest.



Hugh Sherman, Ph.D.
Dean of the College of
Business, Ohio University



Dan T. Moore
Founder, Dan T. Moore Co.



Doug Pontsler
Chairman and Managing
Director, COVE



JobsOhio Attracts Projects That Overdeliver

zulily in Gahanna, Ohio.

50 JobsOhio collaborates with regional and local economic development partners across the state to attract and support the growth of company investments that create and retain jobs in Ohio.

The chart below highlights projects that had a metric evaluation date of 2017. These projects successfully fulfilled their commitments and were reflected as

a JobsOhio win in 2013 or 2014 and received funding from JobsOhio or a combination of funding from JobsOhio and the state of Ohio. Projects that receive state funding only, or are a win without funding, are not reflected in the metric evaluation review.

JobsOhio reviews all potential projects with a consideration for return on investment and breakeven as it takes calculated risks in providing funding. This year's results demonstrate that the projects with a metric evaluation date in 2017 are overdelivering in terms of new jobs created, payroll, capital investment and employees trained.

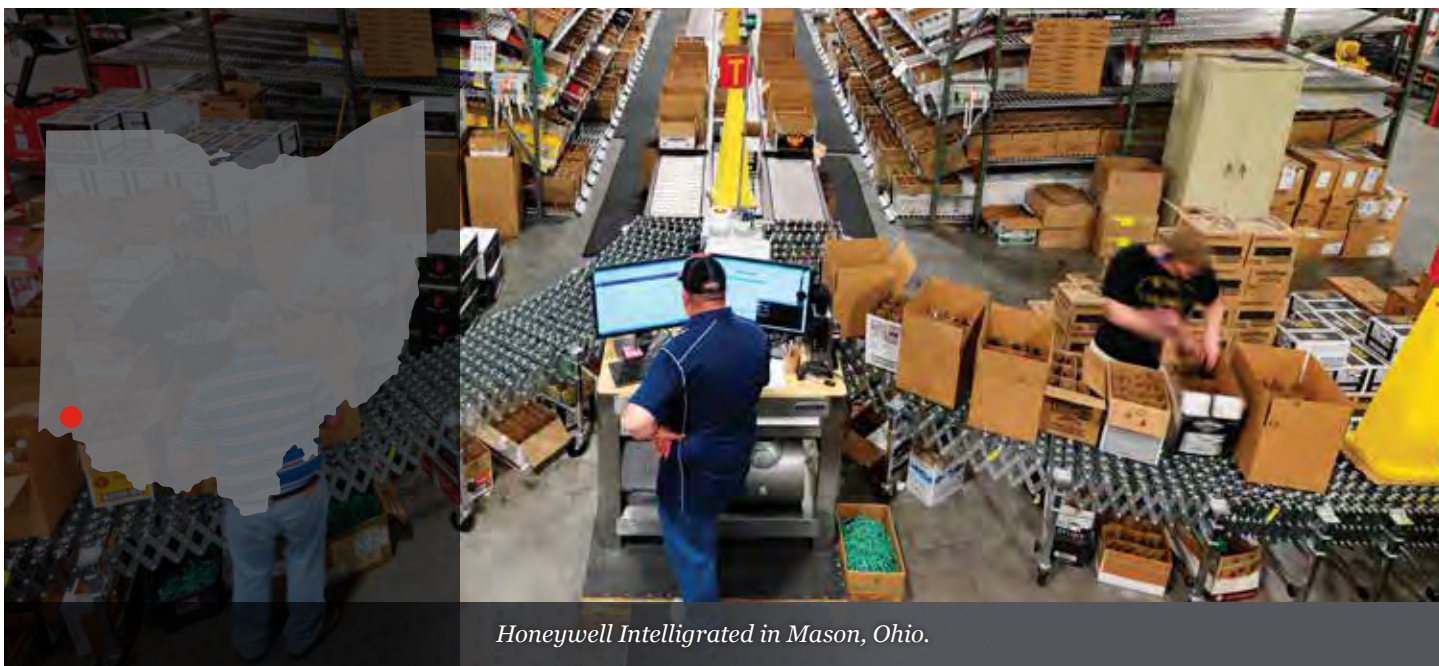
JobsOhio takes the stewardship of its dollars very seriously because they go to supporting jobs and investment to Ohioans. When a company falls short of its commitments, JobsOhio works with the company to understand how the project changed before determining if all or a portion of the incentives should be repaid to JobsOhio. If the company also received support from the State of Ohio, remediation efforts are coordinated with the Development Services Agency.

Honeywell Intelligrated, an automated material handling solutions provider, is one of the many companies that overdelivered on its commitments. Read more about the company's project on the next page.

2017 Metric Evaluation Report

Project Metric	Committed	Reported	Aggregate Performance
Jobs Created	9,846	13,492	137%
Payroll Created	\$482,273,279	\$1,019,834,054	206%
Jobs Retained	21,981	21,981	100%
Fixed Asset Investment	\$1,713,197,946	\$2,464,191,303	144%
Employees Trained*	5,650	14,051	249%

*The aggregate actual performance for 2017 identifies the results of committed versus reported results across the state. *Employees Trained may include training of both new and retained employees.*



Honeywell Intelligrated in Mason, Ohio.

How Honeywell Intelligrated Exceeded Its Commitments

The e-commerce boom is fueling the growth of online retailers, and companies such as Ohio-based Honeywell Intelligrated, which supply machinery and packaging to these businesses, are also growing.

A Rapid Expansion for a Rapidly Expanding Market

Due to an increasing number of online shoppers, both physical stores and online retailers are opening distribution centers to keep up with customer demand. Intelligrated designs, manufactures, integrates and installs automated material handling solutions for retailers, manufacturers and logistics providers in the U.S. and around the world. Its products and services appealed to Honeywell, which purchased Intelligrated in August 2016 for \$1.5 billion.

In 2014, Intelligrated sought to establish a facility dedicated to the research and development (R&D) of automated technologies for logistics with the goal to commercialize new technologies that increase efficiency for new

clients, including a major parcel carrier. Intelligrated won a contract with the carrier to prototype a new conveyor technology, a project that would dedicate 70 percent to R&D and 30 percent to manufacturing.

Reinvesting in a Proven Area

By the fall of 2014, Intelligrated decided to expand its headquarters in Mason, Ohio, for a third time since it was founded in 2001. The company planned to invest \$12.2 million to build an 84,000-square-foot facility and committed to create 238 jobs, primarily in the engineering field. This investment would also enable Intelligrated to continue its close relationship with the University of Cincinnati, maintaining a pipeline of young talent educated in artificial intelligence and engineering.

The company's R&D would increase the reputation and visibility of Ohio's research expertise, keep the company competitive, and develop talent within the automation industry. It would also create high-paying tech jobs in partnership with Ohio universities and students, and promote technology-based economic development that gets ideas to market. The return on investment both for the company and for Ohio would be significant, so JobsOhio provided a grant to help offset expansion costs.

Above and Beyond Commitments

As of 2018, the company exceeded its initial project commitments, creating 986 jobs versus the agreed upon 238 jobs. The company also reported \$12.47 million committed to investment rather than the projected \$12.2 million.

This over-delivery is due, in part, to the rapid growth of e-commerce. But it's also due to Intelligrated's commitment to improving production monitoring, traffic management and the speed and reliability of package tracking, all functions critical to the success of companies involved in e-commerce.

JobsOhio saw the potential of Intelligrated, an already successful company in a growing industry, to create additional benefit for its community and Ohio. JobsOhio intends to continue to invest in companies like Intelligrated that are growing rapidly, creating jobs and investing in the workforce of the future.

Honeywell
Intelligrated®

Financial Statements

Statements of Net Position (Unaudited)

December 31, 2018 and 2017

(In thousands)

Assets:	December 31, 2018	December 31, 2017
Current assets:		
Cash and cash equivalents - unrestricted - JOBS	\$ 223,677	\$ 214,574
Cash and cash equivalents - unrestricted - JobsOhio	108,679	105,333
Cash and cash equivalents - restricted - JOBS	167,589	152,175
Investments - JobsOhio	472,254	407,511
Inventory - JOBS	81,825	71,595
Loans - current portion - JobsOhio	7,924	5,957
Accounts receivable - JOBS	3,749	1,903
Accounts receivable - JobsOhio	1,583	1,592
Prepaid expenses - JOBS	1,194	1,420
Prepaid expenses - JobsOhio	1,068	1,145
Total current assets	1,069,542	963,205
Long-term assets:		
Intangible asset - liquor franchise, net of amortization - JOBS	1,053,342	1,108,539
Capital assets, net of accumulated depreciation - JobsOhio	975	970
Capital assets, net of accumulated depreciation - JOBS	1,158	285
Loans, net of loss allowance - JobsOhio	91,960	67,379
Total long-term assets	1,147,435	1,177,173
Total assets	2,216,977	2,140,378
Liabilities:		
Current liabilities:		
Accounts payable - JOBS	42,439	19,944
Accounts payable - JobsOhio	2,157	1,355
Accrued liabilities - JOBS	50,559	58,154
Accrued liabilities - JobsOhio	141,655	104,186
Special obligation bonds payable - current portion - JOBS	45,845	44,870
Bond interest payable - JOBS	28,524	29,012
Capital lease payable - current portion - JobsOhio	10	10
Total current liabilities	311,189	257,531
Long-term liabilities:		
Special obligation bonds payable - JOBS	1,332,547	1,381,140
Capital lease payable - JobsOhio	3	13
Total long-term liabilities	1,332,550	1,381,153
Total liabilities	1,643,739	1,638,684
Net position:		
Net investment in capital assets - JOBS	1,158	285
Net investment in capital assets - JobsOhio	975	970
Unrestricted - JOBS	31,462	16,975
Unrestricted - JobsOhio	539,643	483,464
Total net position	\$ 573,238	\$ 501,694

These statements provide the combined financial information of JobsOhio and JobsOhio Beverage System (JOBS) as of December 31, 2018 and 2017. Current assets include more than \$167 million of restricted cash that is to be used solely for the operation of JOBS' liquor enterprise. JobsOhio has outstanding, non-executed commitments of loans and grants totaling \$303 million to companies for the purpose of job creation and retention; these commitments are not reflected in JobsOhio's statements of net position. Please visit JobsOhio.com for more information on JobsOhio's and JOBS's financial statements.

Statements of Revenues, Expenses, and Changes in Net Position (Unaudited)
 Twelve months ended December 31, 2018 and 2017
 (In thousands)

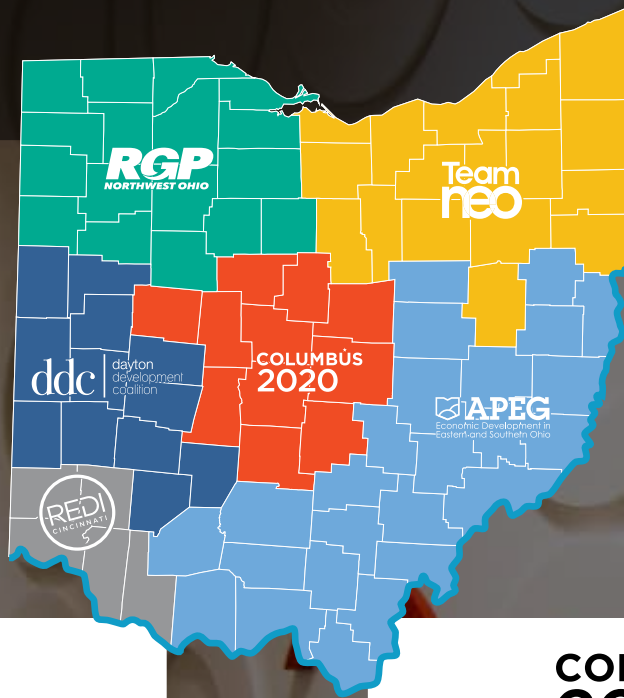
	Twelve months ended December 31, 2018	Twelve months ended December 31, 2017
Operating revenues:		
JOBS:		
Retail net liquor sales	\$ 900,036	\$ 830,133
Wholesale net liquor sales	333,945	314,562
Distribution center revenue	6,851	3,231
JobsOhio:		
Interest income - loans	2,399	2,082
Fees and other	283	482
Total operating revenues	1,243,514	1,150,490
Operating expenses:		
JOBS:		
Cost of goods sold	727,017	693,933
Sales commissions	67,358	62,443
Liquor gallonage taxes	49,475	47,367
Amortization of intangible asset - liquor franchise	55,197	55,197
Service fees	16,738	20,238
Supplemental Payment	48,199	12,713
Other	11,192	14,417
JobsOhio:		
Economic development programs	118,537	102,884
Salaries and benefits	15,810	11,539
Professional services	6,290	4,413
Administrative and support	5,099	4,032
Marketing	10,757	11,384
Total operating expenses	1,131,669	1,040,560
Operating income	111,845	109,930
Nonoperating revenues (expenses):		
Bond interest, net - JOBS	(54,301)	(55,241)
Investment income - JobsOhio	9,026	3,611
Other, net - JOBS	4,974	2,003
Total nonoperating revenues (expenses)	(40,301)	(49,627)
Change in net position	71,544	60,303
Net position, beginning of period	501,694	441,391
Net position, end of period	\$ 573,238	\$ 501,694

JobsOhio

JobsOhio is a 501(c)(4) private nonprofit corporation and the sole member of JobsOhio Beverage System (JOBS), a 501(c)(3) private nonprofit corporation. The primary source of funding for JobsOhio is grants from JOBS. These grants enable JobsOhio to fulfill its economic development purpose by promoting job creation and new capital investment in Ohio through business attraction, retention and expansion activities.

JobsOhio Beverage System

On Feb. 1, 2013, JOBS purchased from the state an exclusive franchise for the sale of spirituous liquor throughout Ohio. In addition to the initial cash payment, JOBS committed to make supplemental payments as further consideration for this acquisition based on the performance of the liquor enterprise. JOBS operates the enterprise in part through a contract with Ohio Department of Commerce and its Division of Liquor Control. JOBS grants the net profits of the liquor enterprise to JobsOhio.



RGP NORTHWEST OHIO

New Jobs	Retained Jobs	Capital Investment
3,902	16,331	\$2,142 Million
New Jobs Payroll	Retained Jobs Payroll	
\$176 Million	\$775 Million	

COLUMBUS 2020

New Jobs	Retained Jobs	Capital Investment
8,109	7,195	\$1,568 Million
New Jobs Payroll	Retained Jobs Payroll	
\$403 Million	\$468 Million	

ddc | dayton development coalition

New Jobs	Retained Jobs	Capital Investment
3,880	13,363	\$855 Million
New Jobs Payroll	Retained Jobs Payroll	
\$203 Million	\$787 Million	



New Jobs	Retained Jobs	Capital Investment
3,769	11,768	\$375 Million
New Jobs Payroll	Retained Jobs Payroll	
\$183 Million	\$849 Million	

One multi-regional project resulted in 36 new jobs and \$1.7 Billion in capital investment.

"Having built strong partnerships with JobsOhio and Appalachian Partnership for Economic Growth, the support provided by these partner economic development agencies as we navigate through multiple project submissions is immeasurable."

Melissa Clark, director, Gallia County Economic Development

One Firm, One State

Teamneo

New Jobs	Retained Jobs	Capital Investment
6,329	16,777	\$2,346 Million
New Jobs Payroll	Retained Jobs Payroll	
\$291 Million	\$1,048 Million	

APEG

Economic Development in
Eastern and Southern Ohio

New Jobs	Retained Jobs	Capital Investment
1,046	4,471	\$654 Million
New Jobs Payroll	Retained Jobs Payroll	
\$57 Million	\$261 Million	

Ohio's unique network of economic development entities consists of JobsOhio at the state level, six regional economic development organizations and hundreds of local economic development organizations that collaborate on solutions for companies and drive economic prosperity across Ohio.

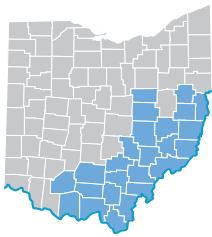
In 2018, this network obtained commitments of \$9.6 billion in capital investment, helped retain 69,905 jobs and created 27,071 new jobs. These results can be achieved only when organizations are united under one mission for the prosperity of Ohio.



Aerial view of Marietta, Ohio.

Appalachian Partnership for Economic Growth

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The Appalachian Partnership for Economic Growth (APEG) region of southern and eastern Ohio made incredible strides in corporate investments and site competitiveness in 2018. This marked a four-year high for job creation from economic development projects. Notable successes were JSW Steel's acquisition of the former Wheeling-Pittsburgh Steel rolling mill and restart of the electric arc furnace, the expansion of PACCAR's Kenworth heavy truck assembly plant, and the opening of a cabinet assembly and distribution facility owned by the Chinese company Qingdao Haiyan.

The APEG region worked hard in 2018 to prepare for additional growth. This resulted in a record number of site

searches and site visits for the region. To address the need for more competitive sites, JobsOhio awarded over \$11 million in funding support to the region for industrial site redevelopment, and APEG completed its third year of awarding site readiness grants to assist communities with site engineering and validation. Two additional greenfield sites gained SiteOhio Authentication. Additionally, recognizing some of the unique distress characteristics of Southern Ohio, JobsOhio launched a site due-diligence initiative for select Southern Ohio sites as well as a handful of sites in counties touching the Ohio River that have petrochemical development potential tied to the Utica Shale.

Plans for 2019

- Promoting a satellite expansion strategy** around major metro areas to take advantage of the region's labor surplus
- Capitalizing on the potential** for petrochemicals manufacturing and power generation tied to the Utica Shale
- Creating plans and tools** for speculative site and building development
- Undertaking a participatory prosperity plan** that will build a regional consensus on economic aspirations, goals and strategies, and create an economic development game plan for the region



Kenworth Truck Company in Chillicothe, Ohio.



Columbus, Ohio, skyline.

Columbus 2020

The 11-county Columbus Region has worked tirelessly throughout the decade on the Columbus 2020 Regional Growth Strategy in order to secure economic base jobs, capital investment and raise per capita income. The platform that this strategy has built includes both a nationally regarded regional economic development team as well as an aligned network of partners. The Columbus Region has become one of the fastest growing metropolitan economies in the nation, raising its regional gross domestic product faster than any other area in the Midwest. It's also a top location for millennial growth in the U.S.

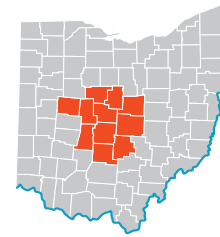
The Columbus Region is blessed with large government and academic sectors, over 50 employers with more

than 1,000 employees, and a growing technology industry encompassing both startups and institutional spinoffs. The economy is diversified, with major stakes in the automotive and smart mobility, logistics and e-commerce, finance and insurance services, and retail and retail technology industries. Emerging industries include healthcare services technology, gene therapy and fintech/insurtech.

The success of the regional growth strategy has prompted the area to undertake a comprehensive examination of its economy, strengths and opportunities as well as the Columbus 2020 organization. The goals for the next decade are under review, but they will address jobs and investments as well as economic inclusion, innovation and community preparedness.

COLUMBUS[★]
2020

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Students walk across The Ohio State University campus in Columbus, Ohio.



Dayton, Ohio, skyline.

Dayton Development Coalition

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The Dayton Development Coalition (DDC) helps connect companies to the resources they need so they can innovate and grow. For 25 years, the DDC's mission has been to recruit, expand and retain jobs in the Dayton region. It opens doors for businesses interested in locating to or expanding within Western Ohio. The DDC connects entrepreneurs who have a bold vision for growth to the resources they need to flourish.

The DDC also collaborates with local, state and federal elected leaders to advance the region's economic priorities and advocate for its military installations. The DDC strives to raise the area's

national profile and share why businesses call the Dayton region home.

The Dayton region's mission will guide its efforts moving forward. The DDC will: collaborate with the region's educational partners to build a strong workforce pipeline to support employment opportunities for all skill levels, focus on attracting companies that complement the regions' growing industries, and work to expand business opportunities at and around Wright-Patterson Air Force Base.

The Dayton region continues to see investment from companies in aerospace, healthcare, technology, automotive, and logistics and distribution. In 2018, the region's growth came from both new and existing businesses, such as Crown Equipment Corp., Speedway, AxoGen Inc., Chewy and Topre America.

For decades, a strong regional network of partners, combined with the DDC's dedicated staff, have provided companies the support and expertise they need to create jobs in Western Ohio.



Crown Equipment Corporation in New Bremen, Ohio.



REDI Cincinnati

Pendleton, a neighborhood on the east side of Over-the-Rhine in Cincinnati, Ohio.

REDI Cincinnati is focused on collaborating with its partners in Greater Cincinnati to address three important areas: making more sites ready for business from day one, leveraging the region's talent base to meet businesses' needs, and improving connectivity between workers and jobs in the region.

The Greater Cincinnati region has a strong foundation in six key clusters: aerospace, automotive, healthcare, food and flavoring, technology and shared services. One shining example of regional collaboration in 2018 is the Uptown Innovation Corridor. The University of Cincinnati opened an impressive space where talent is connecting with companies to make innovative solutions come to life.

Leaders from Cincinnati Children's Hospital, the University of Cincinnati and other trusted local organizations are coming together under one roof at the new 1819 Innovation Hub, a place where students, faculty, administrators and business leaders engage daily, tackling some of today's most pressing challenges in tech, manufacturing, healthcare and other disciplines.

From data analytics to medical devices, healthcare companies are creating innovative solutions in the medical field. Companies like Ensemble Health

Partners, Enable Injections, AtriCure and Medpace are evolving their industries to become more competitive, bringing about better education, better opportunities and better communities.

The Greater Cincinnati region has worked hard to create a thriving and inclusive ecosystem, where startups, elected officials and corporations are working collaboratively to compete globally. The region has combined its business-friendly atmosphere with its grit and determination to create forward-thinking initiatives, making it a world-class and one-of-a-kind location.



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Visitors enjoy the BLINK art event at Fountain Square in Cincinnati.



The city of Toledo, Ohio.

Regional Growth Partnership

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The private sector's dynamic support, guidance and leadership have been cornerstones of the considerable successes that are contributing to Northwest Ohio's economy.

As a 100 percent privately funded organization, the Regional Growth Partnership (RGP) engages both financially and strategically with regional businesses to attract and retain new investment and jobs to Northwest Ohio. These private partnerships provide the foundation for continued prosperity throughout the region and allow the RGP to build and implement aggressive programs. For example, the business expansion and retention initiative supports the growth of existing businesses and has earned "best practice" accolades across the state.

The RGP utilizes ongoing initiatives in continuous strategic planning to recognize, address and prepare for the advancements of tomorrow's economy. The RGP builds on its foundation and core principles, primarily working and engaging with the region's dynamic and influential business community.

The RGP Has Prioritized the Following Initiatives

1. **Serving as a leading facilitator with regional groups** to address the region's future workforce needs
2. **Preparing logistics, intermodal and distribution sites** for the exponential growth of manufacturing and e-commerce fulfillment centers
3. **Positioning Northwest Ohio at the forefront of testing, research and development** for autonomous and connected vehicles
4. **Capitalizing on natural gas opportunities** through its close proximity to the Marcellus and Utica shale plays

Northwest Ohio has a rich history of manufacturing that continues to flourish in today's global economy. Leaders such as Pilkington North America and First Solar recognize the assets of Northwest Ohio's manufacturing landscape; both companies have made significant investments for new production facilities that will create jobs. The region's automotive industry also serves as a primary source for job creation and investment. Northwest Ohio has effectively expanded the regional industry base, successfully landing new companies in a host of other industries including healthcare, energy and food processing.



JAC Products in Napoleon, Ohio.



Downtown Cleveland, Ohio.

Team NEO

Team NEO has built an increasingly coordinated business development network designed to deliver unique tools and capabilities that regional partners can leverage to drive business development and increase the pace of technology adoption among companies in the region. This collaboration has triggered increased capital investment and job growth across Northeast Ohio.

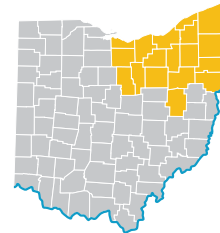
Team NEO accelerates the pace of technology adoption by assembling teams that expose the region's driver industries to emerging clusters, such as additive manufacturing and smart manufacturing technologies. These interactions enhance revenue growth and productivity, while defining the skills needed by Northeast Ohio's workforce of tomorrow.

Moving forward, Team NEO's focus will be on opportunities to advance key competitive areas that are critical elements for better business development outcomes and a more vibrant economy. These include site preparation, talent pipelines and adoption of 21st century technologies. Team NEO will play a role in aligning higher education institutions with the business community to address the mismatch between the supply of talent graduating from local colleges and universities and the business community's projected needs. Inherent in all of this

work is the economic imperative of advancing inclusion initiatives that connect those most disconnected to opportunities in the region.

A diverse mix of companies across multiple industries continue to invest in Northeast Ohio, which positions the region positively to the world. Swagelok's decision to build its new Global Headquarters and Innovation Center in Solon, Babcock & Wilcox announcement of relocating its corporate headquarters to Akron from Charlotte, N.C., BWXT Technologies Inc. plans for its subsidiary BWXT Nuclear Operations Group Inc. to invest in its Barberton and Euclid facilities, and Nestlé's continued growth in Northeast Ohio are just a few examples of the many corporate investments that are bringing about growth and prosperity to Northeast Ohio.

Team
neo



NASA Glenn Research Center in Cleveland, Ohio.

2018 Company Wins

JobsOhio thanks the following companies for achieving the next level of success and creating jobs for Ohioans.

- | | | |
|----------------------------------------------|---------------------------------------|-----------------------------------|
| 20/20 Custom Molded Plastics, LLC | Chewy, Inc. | Firstar Precision Corporation |
| 20100 ST. CLAIR AVENUE, LLC | CMG Strategy Co, LLC | Formlabs Ohio Inc. |
| AAG Glass, LLC | Columbiana Boiler Company, LLC | Foundation Software, Inc. |
| ABC INOAC Exterior Systems, LLC. | Community Blood Center | Fulton County Processing, Ltd. |
| Ace Hardware Corporation | ConAgra Foods Packaged Foods, LLC | G&S Metal Products Co., Inc. |
| Acero Junction, Inc. | Continental Structural Plastics, Inc. | Geo-Tech Polymers, LLC |
| Advanced Composites, Inc. | COTSWORKS, LLC | GKN Freight Services, Inc. |
| Advanced Power North America | CoverMyMeds LLC | Graphic Village, LLC |
| Aerocontrex Group, Inc. | Covert Manufacturing, Inc. | GREENPOINT METALS, INC. |
| Aetna Resources LLC | CPG International LLC | Guild Associates, Inc. |
| Agrati - Tiffin, LLC | Crane Consumables Inc. | Haltec Corporation |
| Air Waves LLC | Creative Packaging, LLC | Hanon Systems USA, LLC |
| Airstream, Inc. | Credit Adjustments, Inc. | Hardy Diagnostics |
| Aldi Inc. | Crow Works, LLC | Hollar, Inc. |
| Ali Industries, Inc. | Crown Equipment Corporation | HomeGoods, Inc. |
| ALPLA Inc. | Dana Limited | Honda Kaihatsu Americas, Inc. |
| Amazon.com Services, Inc. | Davenport Aviation, Inc. | Honda of America Mfg., Inc. |
| American Electric Power Service Corporation | Decked LLC | Honda R&D Americas, Inc. |
| American Spring Wire | Defiance Metal Products Co. | Honeymoon Paper Products, Inc. |
| Aquablok, Ltd. | Deflecto LLC | IJUS LLC |
| Arconic Inc. | Delta H Technologies, LLC | IML Containers Ohio, Inc. |
| Area Agency on Aging, Region 9, Incorporated | Design Within Reach, Inc. | Import Products Co. Inc. |
| Ascentium Corporation | Discount Drug Mart, Inc. | Inogen, Inc. |
| AstraZeneca Pharmaceuticals LP | Dollar Tree Distribution, Inc. | Insight Catastrophe Group LLC |
| AxoGen Corporation | DownHome, Inc | Inteva Products, LLC |
| BBI Logistics LLC | Eccrine Systems, Inc. | ITM Marketing, Inc. |
| Bed Bath & Beyond Inc. | Echo Health, Inc. | J.I.T. Packaging Cincinnati, Inc. |
| Bellisio Foods, Inc. | EG Retail (America), LLC | JAC Products, Inc. |
| Blade-Tech Industries, Inc. | Ellwood Aluminum LLC | JM Smith Corporation |
| Blue Label Packaging Company | E-Mek Technologies LLC | Johns Manville |
| Boyd Watterson Asset Management, LLC | EMIC North America Corporation | JPMorgan Chase Bank |
| Braun Industries, Inc. | Equator Design, Inc. | JSW Steel USA Ohio, Inc. |
| Brennan Industries, Inc. | Equipment Transport, LLC | Kadant Black Clawson LLC |
| Bullen Ultrasonics, Inc. | Everstream Solutions LLC | Kemba Credit Union, Inc. |
| BWXT Nuclear Operations Group, Inc. | Excelitas Technologies Corp. | Keystone Foods LLC |
| C W Egg Products LLC | Exelon Corporation | Kingsgate Logistics, LLC |
| Candid Care Co. | Fairmount Santrol Inc. | Kocher Foods International, Inc. |
| Cardington Yutaka Technologies Inc. | Fast Switch, LTD. | Kohler Coating, Inc. |
| Central Machinery Company, LLC | FCA US LLC | Kohl's Department Stores, Inc. |
| CeramFab LLC | Feed Fat Company, LLC | Koorsen Fire & Security, Inc. |
| Certainteed Corporation | Festo Corporation | Kurtz Bros., Inc. |
| Charter Communications, Inc. | First Solar, Inc. | |

L3 Cincinnati Electronics Corporation
Lefton Metal Enterprises Corporation
Leidos, Inc.
Lion First Responder PPE, Inc.
Lippert Components Manufacturing, Inc.
Macy's Corporate Services, Inc.
Magna Machine Co.
Magretech, LLC
Manifest Solutions Corp.
Marshall Information Services, LLC
Masco Cabinetry Middlefield LLC
Master Building Components, Inc.
Matic Insurance Services Inc.
Medline Industries, Inc.
Menard, Inc.
Mercer Landmark, Inc.
Midwest Retail Acquisition, Inc.
Midwest Specialties, Inc.
MISUMI USA, Inc.
MITEC Powertrain Inc.
Mitsubishi Chemical Performance Polymers, Inc.
Modular Assembly Innovations LLC
Montauk Innovations LLC
MRL Materials Resources LLC
MSW Plastics USA Inc.
N.B.A. Tech, LLC
N12 Technologies, Inc.
Nanoe
Nanogate Jay Systems LLC
National Automotive Experts, LLC
Natural Essentials, Incorporated
Nature's One, LLC
Nestlé USA, Inc.
New Horizons Baking Company, Inc.
NEX Transport Inc.
Nexus Gas Transmission, LLC
NOX US, LLC
NSG Glass North America, Inc
Ohio Pack, LLC
Option Care Enterprises, Inc.
ORBIS
O'Reilly Auto Enterprises, LLC
Owens Corning
PACCAR Inc.
PAS Technologies Inc.
Phillips Meat Processing, LLC

Pillar Technology Group, LLC
Plastic Systems USA Inc.
Plastpro 2000, Inc.
Precision Alloy Services, Inc.
Prentke Romich Company
Prime Equipment Group, Inc.
Primetals Technologies USA LLC
Progressive Casualty Insurance Company
ProVia LLC
Purina Animal Nutrition LLC
QuEST Global Services-NA, Inc.
Ravago Americas LLC
Rayco Manufacturing, LLC
RBB Systems, Inc.
Reifel Industries, Inc.
Relink Medical, LLC
Republic Steel
RevLocal, LLC
Revolucion Holding, Inc.
RhinoSystems, Inc.
Rimeco Products, Inc.
Ripley Metalworks, Ltd.
Rise Brands Inc.
Root Insurance
Rumpke Consolidated Companies, Inc.
S&P Data Ohio, LLC
S.J. Electro Systems, INC.
Safran Power USA, LLC
Samuel, Son & Co. (USA) Inc.
Sauder Woodworking Co.
Scioto Valley Woodworking, Inc.
Search Discovery, Inc.
Sedgwick Claims Management Services, Inc.
Selman & Company, LLC
SGB USA, Inc.
Shanghai Liangxin (Nader) Electrical U.S. Co. Inc.
Shin-Etsu Silicones of America, Inc.
Simaform US Inc
Sims-Lohman, Inc.
Speedway LLC
Speyside Bourbon Cooperage, Inc.
Spray Products Corporation
St. Bernard Soap Company
StandardAero Component Services, Inc.
Steelial Welding & Metal Fabrication, Inc.
Steris Corporation

Stewart-MacDonald Manufacturing Company
Stonecrop Technologies, LLC
Stuchell Products, LLC
Swagelok Manufacturing Company, LLC
Syncreon America Inc.
T. J. F., Inc.
T.Marzetti Company
Tahoma Enterprises, Inc.
Tarkett USA Inc.
Taylor Communications of Minnesota
Teikoku USA Inc.
Test Fuchs Corporation
The Defiance Stamping Co.
The Fremont Company
The General Electric Company
The Great Lakes Construction Co.
The Kroger Co.
The Schroer Group, Inc.
The Tomko Company, LLC
Tiffin Metal Products Co.
Titanium Metals Corporation
Topre America Corporation
Tower Automotive Operations USA I, LLC
TPAM INC.
Transglobal, Inc.
Trinity Health Corporation
U.S. Bank National Association
UGN, Inc.
Union Metal Industries Corporation
Upstart Network, Inc.
U-Pull-And-Pay LLC
USAVinyl, LLC
Veeva Systems Inc.
Vehstek Systems Inc.
Walgreen Co.
Wannemacher Enterprises, Inc.
Weastec, Incorporated
WENCO Construction Company, LLC
White Castle System, Inc.
Wilbert Plastic Services
William R. Hague, Inc.
Wolf's Ridge Brewing, LLC
Wright-Patterson Air Force Base
Xcess Limited
Zimmer Surgical, Inc.

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41 S. High Street, Suite 1500
Columbus, OH 43215

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