



Seneca & Sandusky Counties

2023 Comprehensive Economic Development Strategy (CEDS)

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Overview of a CEDS

What is a CEDS?

The Comprehensive Economic Development Strategy (CEDS) is a strategy-driven plan for regional economic development that is the result of a regionally owned planning process. The CEDS is designed to build capacity and guide the economic prosperity and resiliency of an area or region.

Why is the CEDS important?

- Builds on the strengths of a region and identifies gaps in resources, expertise, and its programs.
- Facilitates regional collaboration, expands supply chains, and grows and supports new industry clusters.
- Increases the likelihood of attracting federal funds and technical assistance by demonstrating resources are used efficiently and effectively.
- Makes a region eligible for some forms of federal funding.
- Increases resiliency and better positions the region to plan for, respond to, and recover from natural disasters and economic shocks.
- Serves as a call to action and an engagement platform for regional economic development initiatives¹.

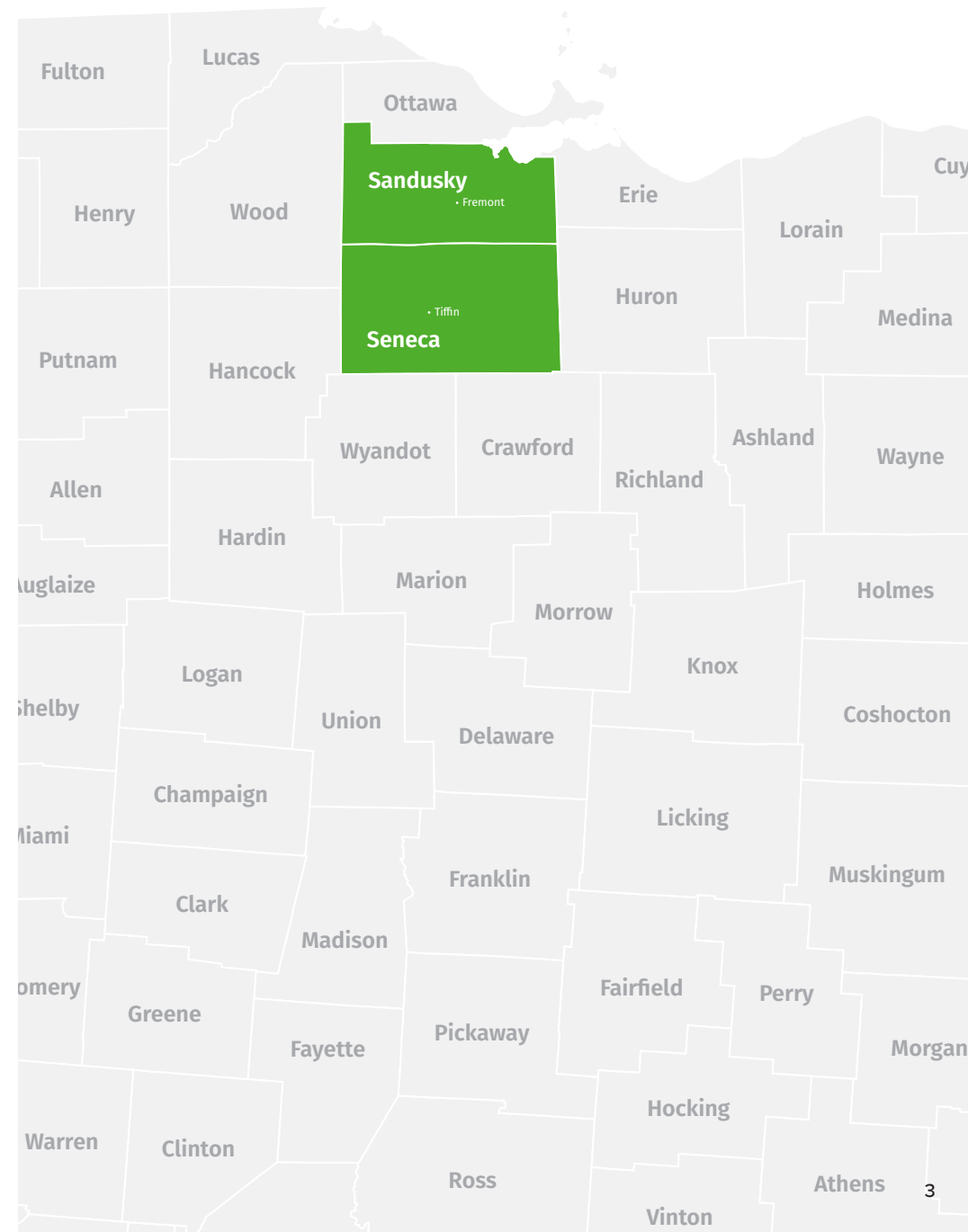
What are the components of the CEDS?

Regional Assets

- This section highlights a sample of the region's natural and physical assets that provide areas of comparative advantage for the region.

Demographic & Economic Data

- A key component of the CEDS process is to analyze and document the



¹ NADO CEDS Central: <https://www.cedscentral.com/ceds-101.html>

Overview of a CEDS

economic, demographic, and social state of the region.

- The exact data points needed vary by region and should be chosen to help analytics to inform the development of the SWOT analysis and the Action Plan.

Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis

- A SWOT analysis helps the region answer the question: “Where are we now?” by addressing the region’s unique assets and areas of competitive advantage.
- The SWOT analysis also identifies the internal or external factors that can keep a region from realizing its potential.

Action Plan

- The action plan, comprised of a vision statement, goals, objectives, and strategies, is the “heart and soul of the CEDS” that flows from the SWOT analysis.
- The action plan answers the question, “Where do we want to go and how are we going to get there?”

Evaluation Framework

- The evaluation framework is utilized to track progress on the implementation of the Action Plan. It contains a variety of economic metrics.
- The evaluation framework answers the question, “How are we doing, and what can we do better?”
- Measures selected should be based upon what is important to the region and what conditions need to be reserved or created.

Economic Resilience

- A CEDS should also contain strategies to enhance economic resilience and build capacity to recover quickly, from withstand, or avoid economic



Overview of a CEDS

or natural shocks.

- Strategies selected should be based upon what is important to the region and what conditions need to be reversed or created to establish responsive and durable information networks. This encourages communication and collaboration among regional stakeholders for existing and potential future challenges.





Introduction

The CEDS has been developed through a joint effort between Seneca and Sandusky Counties in northwest Ohio. The two counties are in close proximity to the Toledo Metropolitan Area, and they are north of Columbus. The largest cities in the area are Tiffin, which is in Seneca County, and Fremont, in Sandusky County. There are many other cities, villages, and townships within each county. Seneca County is bisected by U.S. 224, which runs the width of the county. Sandusky County is home to U.S. 6 and U.S. 20, which both run along the outskirts of the city of Fremont. Interstates 80 and 90 run along the top of Sandusky County, which make up a part of the Ohio Turnpike.

According to the 2020 Census, Seneca County is home to 55,080 people and Sandusky County is home to 58,900 people (and together both counties have a total population of 113,980 people). In Sandusky and Seneca County, manufacturing is the largest industry, generating 36.8% of the region's gross regional product (GRP) in 2022. Consequently, the largest occupation in the two counties is working in production.

Seneca and Sandusky County have multiple railways that are owned and operated by Norfolk Southern. Seneca County also has a railway owned and operated by CSX that runs through the City of Tiffin. Additionally, there is the Northern Ohio & Western Railroad which is owned by Sandusky-Seneca-Tiffin Port Authority (SSTPA) that runs through both Sandusky and Seneca Counties to Tiffin. There are also multiple airports in both counties. Seneca County has the Fostoria Metropolitan Airport, the Weiker Airport, and the Seneca County Airport. Additionally, Sandusky County has the Fremont Airport and the Sandusky County Regional Airport.

Both counties are home to multiple education institutions. Tiffin University and Heidelberg University are in Seneca County. Sandusky County is home to Terra

Introduction

State Community College. Furthermore, there are several tourist attractions located in or close to both counties. For example, the popular amusement park Cedar Point is around an hour drive from both county seats. Sandusky County is also home to the Rutherford B. Hayes Presidential Library & Museums, located at the President's former summer estate in Fremont. Additionally, Tiffin is home to an award-winning Downtown Main Street.



Public Engagement

One-on-One Interviews

The Seneca-Sandusky CEDS was developed with input from a large range of community stakeholders from the two counties which made up the Strategy Committee. CRD conducted one-on-one virtual interviews with 24 members of the strategy committee which included mayors, economic development professionals, leaders from local educational institutions, and city council members.

Participants were asked a total of 13 questions to gain insight about the strengths, weaknesses, opportunities, and threats in the region. Responses collected were used to develop the SWOT analysis. Interviewees were also asked for their thoughts on positive economic development and economic development failures, they were asked about the adequacy of cultural, lifestyle, and recreational amenities that currently exist or should be added to attract and retain talent.

Public Comment Period

An important component of the CEDS development process is providing residents of the community an opportunity to provide feedback on the strategy before it is finalized. The Sandusky-Seneca CEDS was open for public comment from January 23, 2024 to February 23, 2024. A survey platform Qualtrics was utilized to collect feedback. Feedback on the Action Plan and the overall design of the story map was solicited. During the public comment period, 298 public comments were received.

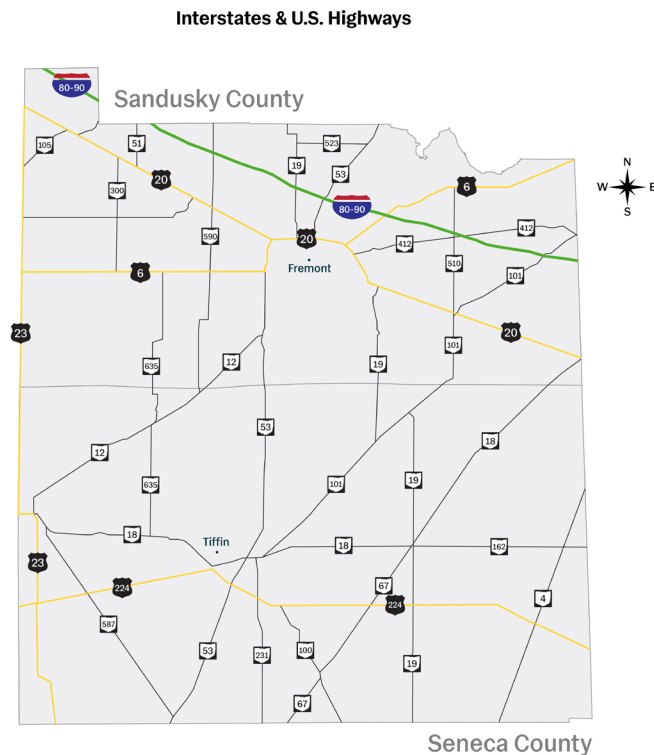


Regional Assets

Sandusky and Seneca Counties are home to an abundance of natural, physical, human, and educational assets that have shaped the region and its people.

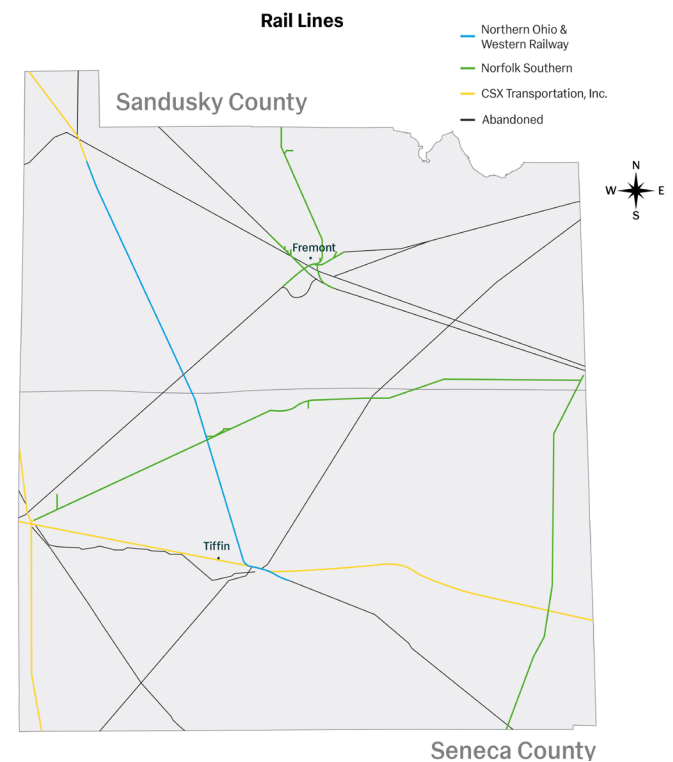
Interstates & U.S. Highways

Sandusky County is bisected by U.S. 6 and U.S. 20, which both go around the outskirts of the city of Fremont. At the top of the county are Interstates 80 and 90 which are a part of the Ohio Turnpike. Seneca County is bisected by U.S. 224 which runs the length of the county. U.S. 23 also runs along the width of the county. These roadway assets provide easy logistics for the transportation of goods to and from the counties. They also facilitate tourism.



Rail Lines

Sandusky and Seneca counties both have rail assets, which includes Class 1 lines for Norfolk Southern and CSX which intersect with each other in multiple places in Seneca County. Sandusky County is primarily utilized by Norfolk Southern. The Northern Ohio & Western Railroad runs through both Sandusky and Seneca Counties into the City of Tiffin. The region's rail assets support the manufacturing companies by facilitating movement of cargo and goods throughout the counties.



Regional Assets

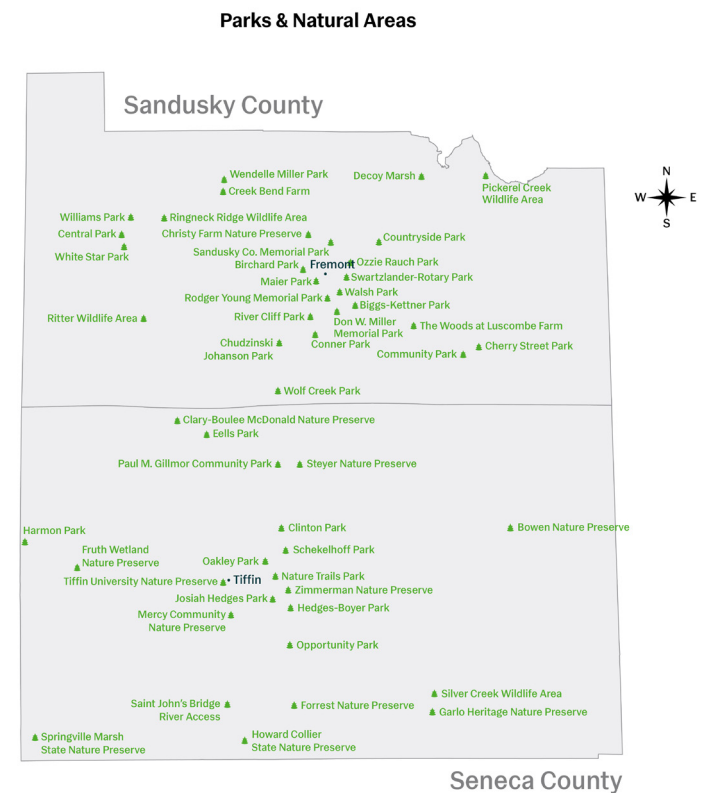
Airports

Both Sandusky and Seneca counties host several airports including the Sandusky Regional Airport, the Fremont Airport, the Seneca County Airport, the Fostoria Metropolitan Airport, the Weicker Airport, and the Bandit Field Airdrome. These airports are vital assets that provide general aviation connectivity for the two counties, which allows for the greater support of cargo and logistics operations.



Parks & Natural Areas

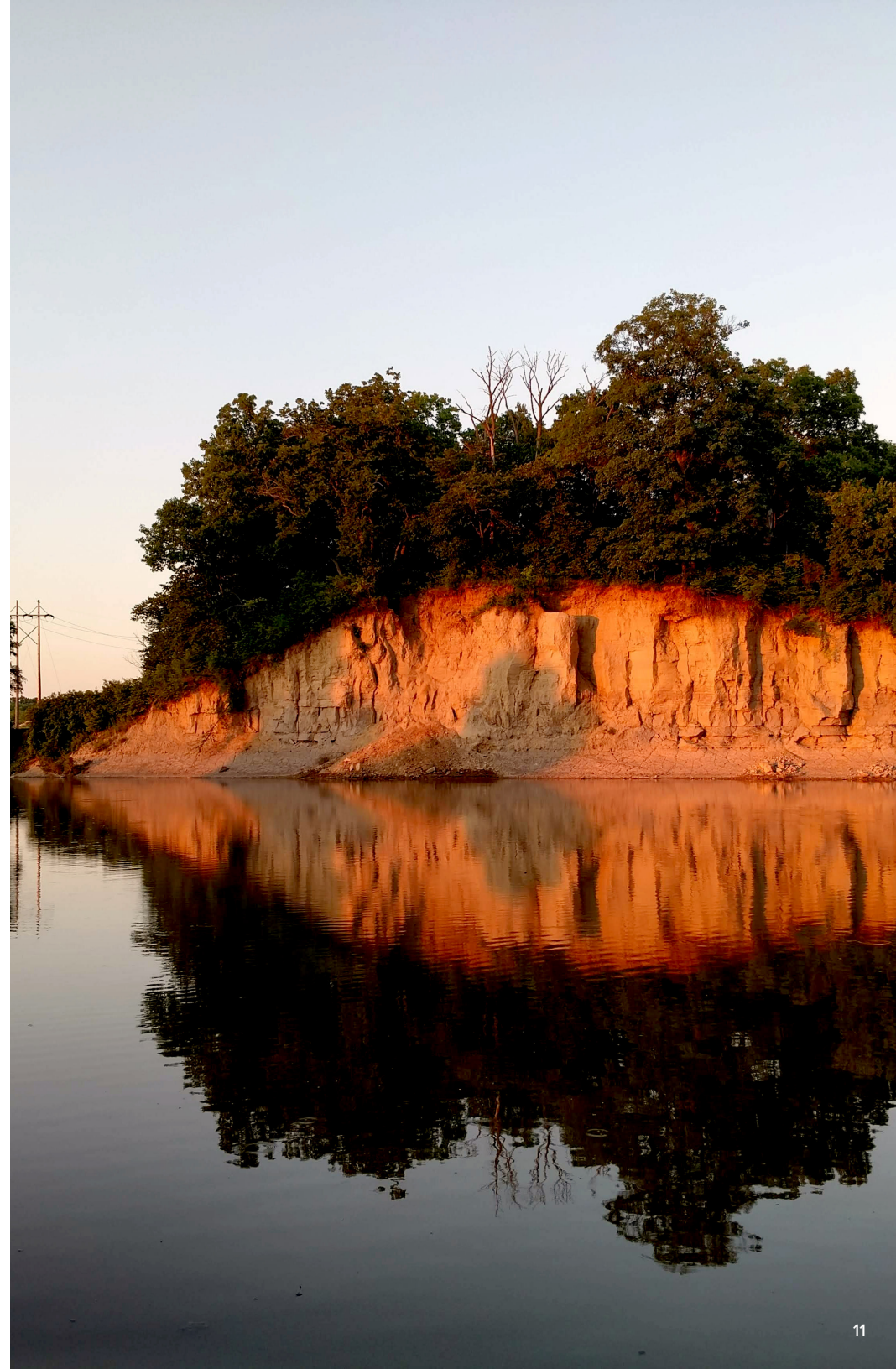
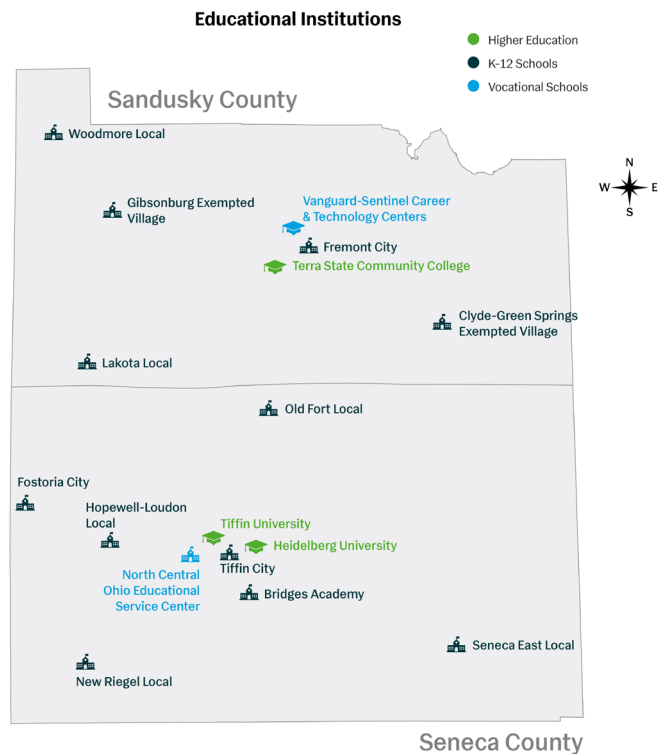
There are a multitude of parks, nature reserves, and wildlife areas throughout both Sandusky County and Seneca County. Sandusky County is home to the North Coast Inland Trail, which is a 28 mile paved trail that runs through the county, and the Mull Covered Bridge, which is one of the last remaining covered bridges in Northwest Ohio. Seneca County hosts Opportunity Park, which provides services to individuals with developmental disabilities, including a fully accessible playground. These areas provide recreational opportunities to residents and visitors and help foster a high-quality of place.



Regional Assets

Educational Institutions

Sandusky County is home to Terra State Community College and Vanguard-Sentinel Career & Technology Center. Seneca County is home to Heidelberg University and Tiffin University. There are a multitude of different educational institutions in Tiffin, including a North Central Ohio Educational Service Center campus, the North Central Academy, Bridges Academy, and Academy of Hair Design. Both Sandusky and Seneca County also have several local school districts. These educational institutions help foster a culture of learning and are vital partners in workforce development in the region.



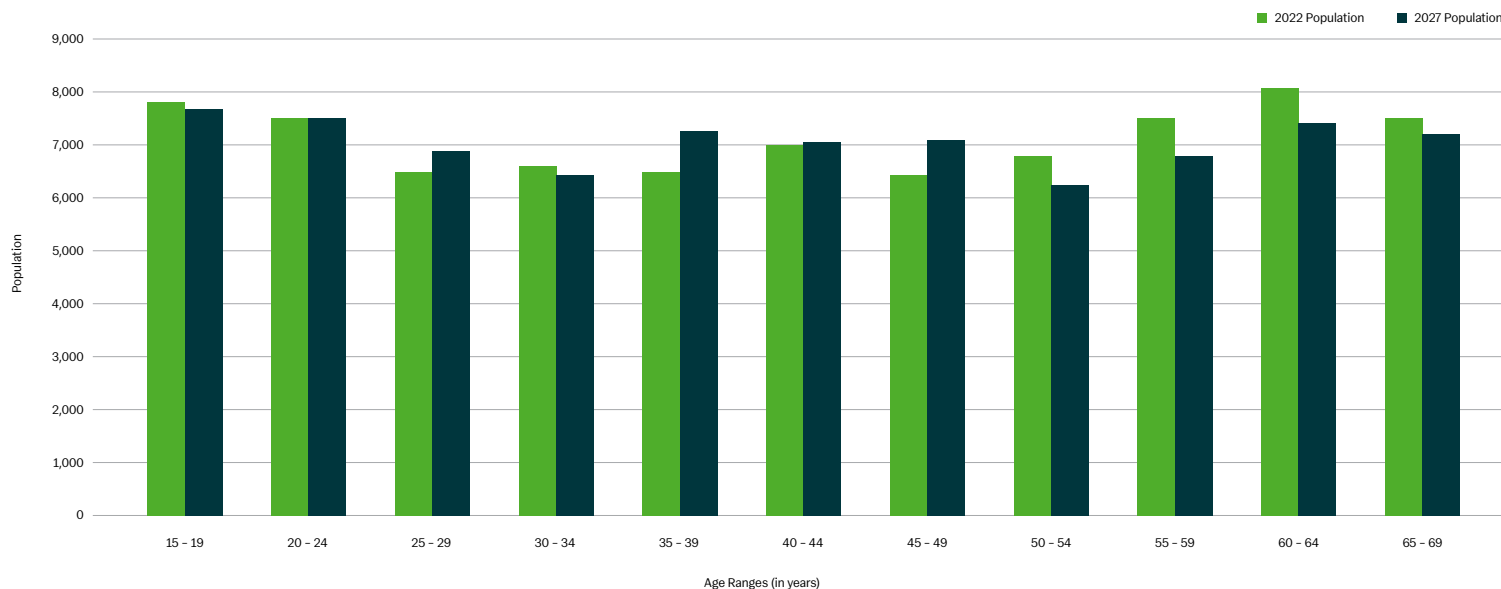
Demographic & Economic Data

To inform the development of the SWOT analysis and the Action Plan, CRD used its capabilities in data analytics and visualization to develop several illustrations that present key demographic and economic data for Sandusky and Seneca County. The data here provides insights on industry clusters and projected industry growth, regional commuting patterns, and population change over a 10-year period.

Aging Workforce

An issue that the Sandusky-Seneca County region is faced with is an aging workforce. When large numbers of the workforce retire around the same time, there is a loss of institutional knowledge and many jobs to fill. When looking at the trends of age demographics in the region, we can see that between the years of 2022-2027 there will be a 9% decline in individuals between the ages of 55-59, an 8% decline in individuals between the ages of 60-64 years old, and a 4% decline in individuals between the ages of 65-69 years old. Other than the age ranges of 35-39 years old and 45-49 years old which see a 10% increase, the other lower age ranges do not show significant growth.

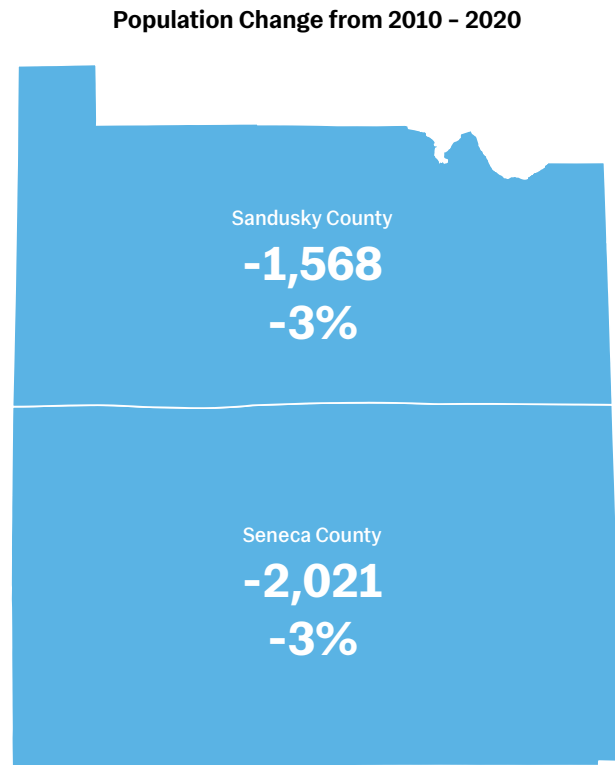
Population by Age



Demographic & Economic Data

Population Change

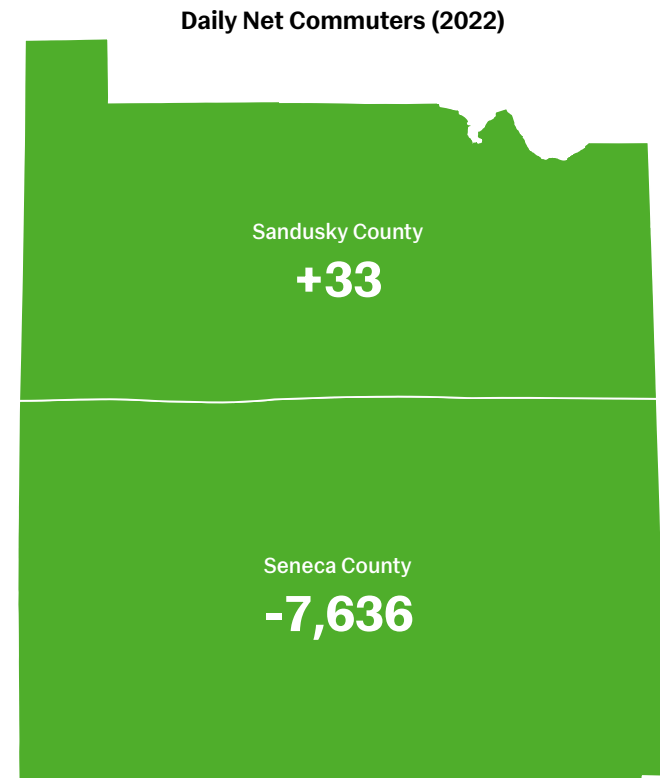
Sandusky and Seneca County have experienced a declining population due to outward migration. According to the 2020 Census, between 2010 and 2020, Sandusky County lost 1,568 people, and Seneca County lost 2,021 people. Projections for population trends for 2020-2030 show a nominal growth in population of 240 people which equates to growth of >1%. The State of Ohio's population is expected to grow by 1% while the United States will see a 5% growth in population by 2030.



Source: Lightcast

Commuting Patterns

Daily net commuters accounts for how many individuals enter, stay, or leave Seneca or Sandusky County each day for work. In 2022, Sandusky County had a net gain of 33 people, while Seneca County had a net loss of 7,636 people leave the county to go to their place of employment. It is ideal to have ample employment opportunities within each county so residents do not have to leave or commute a long distance to their place of employment.



Source: Lightcast

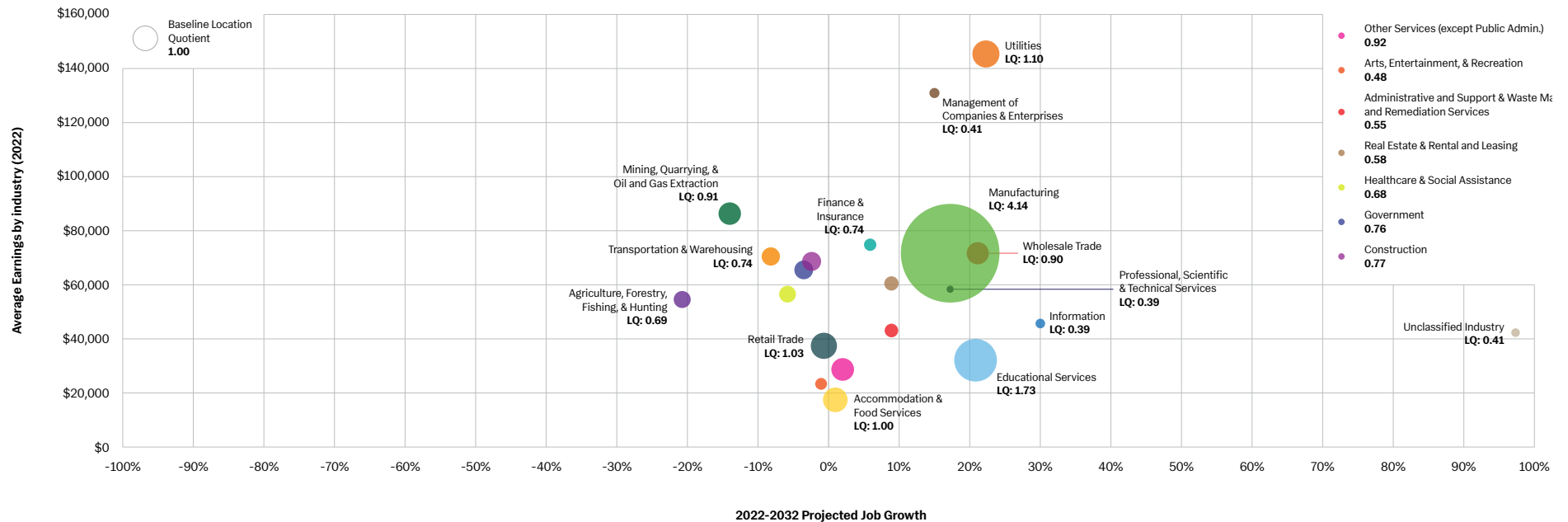
Demographic & Economic Data

Industry Clusters

The cluster chart below shows the projected employment concentration by industry (2032), the projected growth of the industry over the next ten years (2022-2032), and the current average wages paid by industry in 2022 dollars. The size of the industry bubble represents the employment concentration, which measures the comparative advantage the region has in an industry in terms of talent. A value of 1.0 means a concentration of jobs at the national average in a specified region, and a value of above or below 1.0 means a higher or lower concentration of employment

in a particular industry in that region. Over the next ten years, the top five industries with projected employment growth in Seneca and Sandusky Counties are Information (30%), Utilities (23%), Educational Services (21%), Wholesale Trade (21%), and Manufacturing (17%). The employment concentration projection for 2032 shows a very competitive manufacturing concentration at nearly four times the national average. Other competitive employment concentrations in industries projected to grow include the Educational Services (1.73) and Utilities (1.10) industries.

Industry Clusters for Seneca and Sandusky Counties (2022-2032)



Summary Background

In addition, CRD has developed an infographic containing detailed information on population demographics, educational attainment, housing, poverty, labor force participation, income, and information on the region's largest industries. Key insights derived from the analysis of the demographic and economic data are listed below.

Seneca and Sandusky Counties

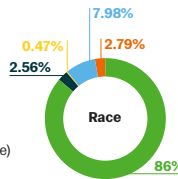
2023 CEDS Summary Background

Economic Data ¹

Region	Ohio
Median Household Income	
\$56,235	\$61,938
Per Capita Income	
\$29,463	\$34,526
Labor Force Participation Rate	
62.07%	63.30%
Poverty Rate	
12.58%	13.35%
Households Receiving Food Stamps	
12.30%	12.36%
Households Below ALICE Threshold	
38.53%	38.45%

Population & Demographics ¹

- White
- Asian
- Other
- Black or African American
- Hispanic or Latinx (any race)



2010 Population
117,505

2010-2020 % Change
-3%

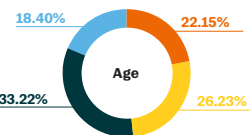
Foreign Born
1.65%

2020 Population
113,916

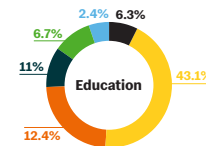
2020 Net Migration
-99

Median Age
41.3

- 0-17
- 18-39
- 40-64
- 65+



- No High School Diploma
- High School Graduate
- Some College, No Degree
- Associate's Degree
- Bachelor's Degree
- Postgraduate Degree



Largest Industries ²

Industry	Employment 2018	Employment 2022	% Change	2022 Average Wages	2022 GRP	% Change Since 2018
Manufacturing	13,884	13,631	-2%	\$72k	\$1.9B	18.20%
Government	5,959	5,628	-6%	\$65k	\$406M	7.67%
Healthcare & Social Assistance	5,727	5,023	-12%	\$59k	\$350M	23.06%
Retail Trade	4,972	4,775	-4%	\$39k	\$391M	29.22%
Accommodation & Food Services	4,310	4,043	-6%	\$20k	\$163M	47.71%
Construction	2,444	2,309	-5%	\$68k	\$235M	18.27%
Other Services (except Public Administration)	2,376	2,209	-7%	\$29k	\$101M	14.21%
Educational Services	1,923	1,853	-4%	\$32k	\$75M	6.63%
Transportation & Warehousing	1,764	1,624	-8%	\$70k	\$196M	12.94%
Administration, Support, Waste, & Remediation	1,413	1,601	13%	\$42k	\$110M	32.21%

2023 Graduates ²

Institution	2022-23 Grads	% Change
Tiffin University	697	-6.9%
Heidelberg University	444	+4.20%
Terra State Community College	313	+8.30%

Other Technical Schools ²

Vanguard-Sentinel Career & Technology Centers

Tiffin Academy of Hair Design

Housing ¹

Region	Ohio
Median Home Value	
\$119,142	\$159,900
Home Vacancy Rate	
9.42%	9.15%
Owner Occupied Rate	
72.74%	66.59%
Total Housing Units	
50,406	5,232,733
% Units Without Vehicle	
5.28%	7.51%



Sources
1 Metopio
2 Lightcast

SWOT Analysis

The Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis helps the region establish a baseline of current economic conditions. The SWOT analysis assesses the region's unique assets and areas of competitive advantage. It also identifies the internal and external factors that can keep a region from realizing its potential.

Strengths

- Manufacturing sector is strong and seeing growth.
- Strong presence of career technology training and trade schools.
- Robust local university presence.
- Momentum in downtown areas (Tiffin & Fremont).
- Expansive network of parks and trails.
- Strong cooperation between economic development organizations.
- Highway access to Route 20 and the Ohio Turnpike.
- The communities are safe and family friendly.

Weaknesses

- Housing stock is low.
- Condition of major roadway corridors (Route 53 and Route 6).
- Existing workforce shortage.
- Lack of available land or building space for new or expanding businesses.
- Lack of access to public water and sewer for new and expanding businesses.
- Lack of diversity in the population.



SWOT Analysis

Opportunities

- Sandusky River river front development in downtown Tiffin and Fremont.
- Utilization of local trade schools to train students for local jobs.
- The fostering of more wide-spread cooperation by bringing all regional stakeholder groups together on economic development.
- Economic growth via the green sector.
- Economic growth via the technology sector.

Threats

- Declining population.
- Aging workforce.
- Volatile housing market.
- Inflation.





Action Plan

The action plan, comprised of a vision statement, goals, and strategies, is the “heart and soul of the CEDS” that flows from regional consensus built through the completion of the SWOT analysis. The action plan answers the question, “Where do we want to go and how are we going to get there?”

Vision Statement

The Sandusky and Seneca County region has a high quality of life sustained by strong public-private partnerships that leverage the region’s natural resources, robust educational institutions, diverse array of businesses and organizations, all committed to fostering an innovative, inclusive, vibrant, and safe community.

Goal #1: Utilize the robust educational resources available in Sandusky and Seneca Counties to fulfill the workforce development needs of current and future employers.

- Strategy One: Develop a comprehensive media campaign to promote career opportunities, to build awareness and participation.
- Strategy Two: Educate business advisory councils on the benefits of YouScience.
- Strategy Three: Research opportunities to educate parents on career paths/ options for their children to help parents become more literate.
- Strategy Four: Broaden business advisory council participation with representation from all segments of the community.
- Strategy Five: Educate employers on funding and resources available to upskill and train workers.
- Strategy Six: Partner with organizations to communicate housing needs for workforce growth.



Action Plan

Goal #2: Support the local manufacturing sector with increased communication and connection to necessary resources.

- Strategy One: Develop an inventory of existing workforce development programs and identify gaps in programming.
- Strategy Two: Create a robust manufacturing workforce attraction and retention plan.
- Strategy Three: Utilizing existing business retention and expansion plans, to determine the needs of employers to advocate for their needs to legislators.
- Strategy Four: Develop a communication plan for distributing information to manufacturers.
- Strategy Five: Develop and update a recurring list of civic engagement opportunities.
- Strategy Six: Enhance existing inventory of current and potential sites for industrial development.
- Strategy Seven: Encourage development of spec buildings.
- Strategy Eight: Seek site certification for identified industrial properties.
- Strategy Nine: Schedule regular meetings with both regional and local utilities.

Goal #3: Improve infrastructure in Sandusky and Seneca County to grow the population.

- Strategy One: Offset cost/identify gap funding to ensure financial feasibility for housing.
- Strategy Two: Identify energy load for potential housing projects.
- Strategy Three: Strong advocacy with ODOT for roadway investment prioritization.
- Strategy Four: Look into MPO/RTPO joint opportunities.
- Strategy Five: Develop partnerships/effective communication to coordinate



Action Plan

stormwater management improvement projects.

- Strategy Six: Improve coordination and implementation of annexation agreements.
- Strategy Seven: Utilize federal funds for energy projects.
- Strategy Eight: Strategize partnerships/communication between providers for electricity generation, transmission, distribution, and government.
- Strategy Nine: Advocate for electricity reliability and affordability.
- Strategy Ten: Utilize federal/state funding to reach unserved areas with broadband.
- Strategy Eleven: Encourage public/private partnerships to expand broadband access.
- Strategy Twelve: Strengthen EMS services and infrastructure.
- Strategy Thirteen: Ensure other infrastructure supports health care services and locations.
- Strategy Fourteen: Engage in conversations with the State of Ohio around electric vehicle charging infrastructure implementation.

Goal #4: Build a strong community providing the best quality of life for all.

- Strategy One: Engage in long term community development planning supported by public and private funding.
- Strategy Two: Address vacant spaces as opportunities for housing or commercial development.
- Strategy Three: Develop incentives for housing developers.
- Strategy Four: Continue to expand and promote public/alternative transportation options available in the community.
- Strategy Five: Increase the availability of case workers to coordinate healthcare services and educate on the services available.



Action Plan

- Strategy Six: Provide resources for improving and sustaining historic properties.
- Strategy Seven: Provide educational opportunities for entrepreneurs and business owners.

Goal #5: Integrate, elevate, and embed educational institutions into the Sandusky and Seneca counties way of life across generations.

- Strategy One: Connect educational institutions with employers to expand internship opportunities.
- Strategy Two: Ensure local universities have business advisory councils integrated into the decision-making process.
- Strategy Three: Expand educational opportunities for nontraditional students.
- Strategy Four: Promote personal development, expanding horizons, and life-skills programming.
- Strategy Five: Expand awareness of leadership training opportunities within our educational institutions.

Evaluation Framework

The Sandusky-Seneca County CEDS Strategy Committee selected performance metrics to measure progress in the region in achieving the goals outlined in the CEDS. The performance metrics selected by the Strategy Committee are largely outcome-based and high-level. The metrics will be utilized to assess the region's

performance advancing economic, community, and workforce development as a result of the implementation of the CEDS. The Strategy Committee will continue to meet quarterly to discuss progress made on implementing the strategies outlined in the CEDS.

Performance Metric	Update Frequency
Number of views/engagements in digital & print media campaign material promoting local career opportunities	Quarterly
Number of students/employees participating in YouScience follow-up programming	Annual
Number of sectors represented and engaged on business advisory councils	Annual
Labor force participation rate	Monthly
Percentage of population at workforce age	Annual
Two-county manufacturing year-over-year earnings	Annual
Location quotient year-over-year change for manufacturing sector	Quarterly
Net job creation in manufacturing sector	Annual
Number of manufacturers participating in workforce programs	Annual
Number of students participating in manufacturing internship program(s)	Annual
Number of spec buildings in progress/completed	Annual
Number of site certifications in progress/completed	Annual
Number of homes added to the County Auditor's Office tax roll	Quarterly
Money invested in roadway/bridge improvement projects	Annual
Net increase in storm water management capacity	Annual
New funding for broadband coming into community	Annual
Percentage of population/student access to broadband at home	Annual
EMS 911 response times	Quarterly
Vacancy rate for commercial/industrial spaces	Quarterly
Park visitation rates	Annual
Recreational program registrations	Annual
Public transportation ridership	Annual
Number of new businesses	Quarterly
Number of lifelong educational opportunities available to residents	Annual
Participation in lifelong educational (non-credited classes)	Semesterly
Level of satisfaction of local employers' internship experience	Semesterly
Value of internship experience for the student	Semesterly
Participation rates in leadership programs (Leadership Sandusky County and Leadership Seneca County)	Annual

Building Economic Resilience

As the final component of the Sandusky-Seneca County CEDS, the Strategy Committee integrated several initiatives to increase steady-state and responsive resiliency in the region. According to the EDA, “steady-state initiatives tend to be long-term efforts that seek to bolster the community or region’s ability to withstand or avoid a shock”. Responsive initiatives “establish capabilities for the economic development organization to be responsive to the region’s recovery needs following an incident”. This holistic definition of economic resiliency allows regions to build systems, structures, and strategies to mitigate and respond to the effects of economic downturns and natural disasters. Steady-state goals and strategies in the Sandusky-Seneca County CEDS Action Plan include:

Steady-State Goals & Strategies

Goal #1 in the Sandusky-Seneca CEDS prioritizes a commitment by economic development professionals in the community to form robust partnerships with the higher education and job training institutions in the region. These partnerships will ensure the region builds a resilient and skilled workforce that is nimble and can anticipate any shifts in job training needs for local businesses.

Goal #2: The Sandusky-Seneca County region has a strong manufacturing sector that is expected to grow in the next 5-10 years. Goal #2 is centered around supporting and sustaining that growth. It includes strategies such as increasing and improving communication with local business about resources available to them and creating a robust manufacturing workforce attraction and retention plan. These strategies will ensure that the region will have a responsive and manufacturing-friendly business ecosystem.



Building Economic Resilience

Goal #3: Infrastructure improvements to support economic development is a high priority in the Sandusky-Seneca County region. Improving infrastructure around transportation, energy, water management, broadband access, and healthcare will allow the region to better withstand unanticipated events and economic disruptions including weather patterns that have become more unpredictable and will continue to do so as our climate changes. It is important to have infrastructure that is built to withstand unexpected weather and other natural disasters.

Goal #4: Community development in the Sandusky-Seneca County CEDS emphasizes improved quality of life for all. One of the strategies to achieve this goal is to engage in long term community development planning. These types of long-range planning efforts will ensure that the amenities in the community keep pace with business growth, which is a key part in attracting and retaining talent.

Responsive Goals & Strategies

Goal #1: Increased and diversified participation on business advisory councils (BACs) in the region is a strategy to address workforce needs under goal #1 in the Sandusky-Seneca CEDS. Increasing participation and bringing more people to the table in the BACs, will provide a venue for businesses and local universities to collaborate on any situations or economic events that need responding to.

Goal #2: Adequate transportation infrastructure is a critical asset when it comes to responding to natural disasters or economic disruptions. One of the strategies under Goal #3 of improving infrastructure is to explore the idea of developing an MPO or RTPO to coordinate and plan efforts around improving transportation



Building Economic Resilience

infrastructure. Developing an organization around transportation will allow for efficient response to any issue pertaining to transportation which again is a critical asset in any community.

Goal #3: The goal of building a strong community to provide the best quality of life for all in the Sandusky-Seneca County CEDS includes ensuring access to adequate healthcare and mental health resources. The COVID-19 pandemic shed light on the importance of a strong healthcare workforce. By working to coordinate healthcare services and professionals who can provide them, the community will be prepared to respond to natural disasters or community-wide health related concerns.

