

CONNECT. INNOVATE. GROW.

DAYTON DEVELOPMENT
COALITION ANNUAL
MEETING + 2019
ECONOMIC REVIEW



2019 IN REVIEW

We have a simple, straightforward mission at the Dayton Development Coalition: To recruit, expand and retain jobs in the Dayton Region. When the year ends and we look back on our work, those three things show the growth of the region's economic base.

For 2019, those metrics hardly seem like enough. In a year that saw catastrophic storms and horrific violence, the Dayton Region responded with compassion, strength, and resiliency. 2019 marked the year our community let the world see what makes us #DaytonStrong.

Led by county officials throughout the region, we walked the path of the storms to help guide businesses to the resources they needed to recover. We continued to focus on projects that created new jobs so our economy could sustain its growth.

In 2019, companies committed to create 2,752 new jobs and keep 8,921 jobs in our region. Those projects will generate more than \$130 million in new payroll and \$738 million in capital investment. Wright-Patterson Air Force Base continues to have a significant impact on our region, with more than 30,000 employees, the largest single-site employer in the state. Our recent economic impact analysis shows our local federal and military installations have a local annual economic impact of more than \$16 billion.

Those results build on decades of hard work by hundreds of local economic development professionals. Since the DDC began in 1994 as the Miami Valley Economic Development Coalition, our region fought back from a major recession, Wright-Patt has nearly doubled in size and our regional economy has strengthened and diversified. Dayton continues to move forward as we rebuild.

We often focus on how our community has come to define collaboration and partnership. In 2019, the Gem City shined with resiliency and strength. Our investor list is filled with companies who have been with us from the very beginning,

businesses who came to the region and wanted to support economic development, homegrown companies that continue to grow, and communities that partner with us to carry out our mission. Their support drives our success and sets our course for the future.

We believe 2020 will bring brighter days and we look forward to your partnership. Thank you for your continued support of the DDC and the Dayton Region.

All our best,



Jeffrey C. Hoagland
President and CEO
Dayton Development Coalition



John T. Landess
Board Chair
Dayton Development Coalition



DDC MODELING STRONG PARTNERSHIP WITH JOBSOHIO

It's hard to believe it has been over 10 years since my days leading the Dayton Development Coalition. The organization continues to thrive as the region's primary advocate. DDC's focus, collaboration and leadership, combined with a willingness to innovate and think big, continue to drive meaningful results while garnering national recognition for the organization.

Back in 2008, when I was the DDC's President and CEO, our team laid out a plan projecting that the Dayton Region would add 10,000 new jobs by 2020. We made this proclamation when everyone around us saw the region's economy shedding jobs as the nation (and our region) sunk into a recession. I'm sure many thought we were crazy. Shouldn't our goal have been to simply stop the decline?

Our goal for our economy needed to be more than survival. The Dayton Region deserves an economy that reflects our spirit of innovation, our hardworking nature, and our desire to collaborate and problem solve.

When this community sets a goal, we put our heads down, work hard, and hit it out of the park – this is part of what makes us who we are. The team supporting the Dayton Region's growth over the years brings together a diverse group of passionate advocates. It includes economic development professionals and champions who see the region's potential. Gov. Mike DeWine, Lt. Gov. Jon Husted, former Air Force Chief of Staff T. Michael Moseley, retired Gen. Lester L. Lyles, retired Lt. Gen. Thomas Owen, and Scott Sullivan have deepened their connection to the region and supported our growth.

Now it is 2020, and the results are in. New and existing companies have committed to create more than 23,000 jobs since 2008. This number doesn't even capture all the job growth during that time, only those aligned with the strategic initiatives of the DDC and JobsOhio. It doesn't reflect the military and civilian growth at Wright-Patterson Air Force Base, with more than 30,000 employees, or jobs added in our hospitals and universities.

When you think back to where our community was 10, 15 or 20 years ago, we have come so far. That's not by accident. We have leaders who have set bold visions for our economic growth, and we are reaping the benefits. The BRAC efforts from the 1990s and 2005 round set the foundation for the growth we've seen at Wright-Patt and Springfield.

The careful, long-term planning and collaboration of partners in the public and private sectors have resulted in economic growth in urban and rural portions of the Dayton Region.

The approval of beyond visual line of sight flight in Springfield was years in the making, starting from the early days of the UAS industry. Col. Joe Zeis initiated these efforts while I was still at the DDC, and today he is helping Gov. DeWine shape our state's aerospace and defense strategy.

When the Dayton Region sets big goals, we always rise to the challenge. Slowly and steadily, we lay the foundation and begin building our future. In 2008, we could only imagine how Dayton would ultimately recover from the recession, but we knew we would.

In March, I joined JobsOhio, the state's private economic development corporation, as its president. Going into 2020, JobsOhio seeks to adapt our model to fuel more growth by collaborating with the DDC and our other Regional partners. That will come with another round of bold goals for our state and our regions.

I know Dayton and the DDC are more than ready for the challenge.



J.P. Nauseef
President and Chief
Investment Officer
JobsOhio
DDC President, 2004-2008



2019 MAJOR PROJECTS

COMPANY	JOBs CREATED	JOBs RETAINED	CAPITAL INVESTMENT
Cornerstone Research Group, Inc.	250	88	\$9.8M
Tyler Technologies, Inc.	225	158	\$8.4M
Code Blue, LLC	169	126	\$1.05M
Menard, Inc.	150	0	\$81.484M
Crocs, Inc.	130	0	\$17.3M
GE Aviation Systems North America, Inc.	125	1,700	\$31M
Xerion Advanced Battery Corp.	120	0	\$21M
Dmax, Inc.	100	810	\$147M
Honeywell International, Inc.	80	750	\$0
Cargill, Incorporated*	12	293	\$185M

> 2nd Place, Governor's Cup, Site Selection Magazine's mid-sized metro, 13 years in the top 10

* Top 9 projects are by jobs created. Cargill committed to the most capital investment in 2019.



2,752
Jobs Created



\$130M
Jobs Created Payroll

8,921
Jobs Retained

\$338.23M
Jobs Retained Payroll

\$738.87M
New Capital Investment

43 Projects Won **405** BR&E Visits



New Capital Investment

REGIONAL ADVOCACY

Priority Development and Advocacy Committee (PDAC) 2018-2019 round, concluding in 2019

55 Organizations represented on committee and review panels

75 Individuals serving on panels

48 Submissions

Fly-in

139

People attended

84

Organizations represented

Policy and Administrative Initiatives Supported

> Appropriating \$120.9 million to complete construction of a \$182 million Intelligence Production Complex for the National Air and Space Intelligence Center at WPAFB. Congress appropriated two phases of funding in one year, advancing the project. This is one of the largest construction projects in the history of the base.

> Passing state legislation to make it easier for spouses of active duty military personnel to get occupational licenses when their spouses are transferred to Ohio. This is a high priority for the Air Force and will help attract new jobs and retain Air Force missions in the state.

> Extending annual federal funding for the operations of the National Aviation Heritage Area, which promotes aviation-related tourism in eight counties of western Ohio. Aviation tourism in the region is estimated to support 1,500 jobs and generate \$35 million in annual economic impact from more than 2 million visitors per year.

> Announcing the opening of the Department of Veterans Affairs History Center on the campus of the Dayton VA and the hiring of a VA chief historian. The opening of the center culminated a decade-long effort which will make Dayton the center for the collection, preservation, and display of historic VA artifacts and a hub of VA historical research.

2019 VENTURE CAPITAL INVESTMENTS



36

Businesses first evaluated and given feedback in 2019

1

Business approved for investment in 2019

13

Businesses receiving in-depth evaluation and coaching in 2019

5

Businesses approved for follow-on investment

8

Businesses entering due diligence for investment in 2019

\$1.036M

Committed in 2019

\$6.811M

Total committed since fund inception

\$0.879M

Available for investment

\$4.699M

Sidecar investment since fund inception

\$0.476M

Sidecar investment in 2019

\$0.69

Amount generated in sidecar investments for each \$1 spent



Top left: IncludeHealth, Inc. provides an integrated digital health and wellness ecosystem that pairs HIPAA-compliant cloud software, health informatics sensors and inclusive functional training equipment. In 2019 it was awarded an AFWERX Phase I SBIR grant to develop and standardize next-generation fitness protocols for warfighters. In December 2019, it licensed digital health technology to offer camera-based, real-time movement analysis, and corrective feedback to optimize biomechanics for injury prevention and performance enhancement.

Below left: Healthy Roster, Inc. provides mobile patient engagement, care coordination, secure communication and outreach tools for athletic trainers in the field and sports medicine departments. Dayton Children's Medical Center is one of the company's clients. HR is also beginning to test the software communication concept in other health disciplines, such as home care and industrial workplace settings, where on the job injuries are an important factor in productivity.

RECRUITMENT, EXPANSION & RETENTION

Promoting the Dayton Region

Domestic Site Selector Events & Trade Shows

- > Site Selectors' Guild Annual Conference in Salt Lake City, Utah
- > Association for Unmanned Vehicle Systems International (AUVSI) in Chicago, Illinois
- > Maintenance Repair Operations (MRO) Show in Atlanta, Georgia
- > Industrial Asset Managers Council in Santa Barbara, California; Milwaukee, Wisconsin; Columbus, Ohio
- > Area Development Consultants Forum in Charlotte, North Carolina; Houston, Texas
- > SelectUSA FDI in Washington, DC
- > UAS Midwest in Springfield, Ohio
- > Air Force Life Cycle Industry Days in Dayton, Ohio
- > Mid-America Economic Development Council Competitiveness Conference in Chicago, Illinois

- > I-70/75 Development Association Annual Summit in Dayton, Ohio

International Travel

- > Quebec, Canada Business Development Mission
- > Ontario, Canada Business Development Mission
- > China Business Development & Dayton Region HQ Meetings
- > Hannover Messe & German Dayton Region HQ Meetings
- > Paris Air Show
- > Midwest Japan Association (MWJA) & Dayton Region HQ Meetings

Market Visits

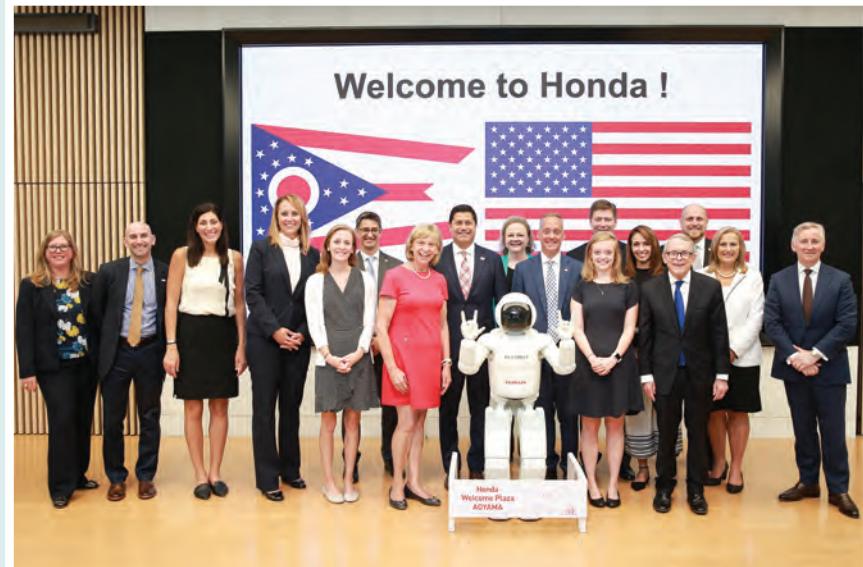
- > Chicago, Illinois
- > New York City, New York
- > Atlanta, Georgia
- > Dallas, Texas
- > Washington, DC

Consulates Visited

- > Japan
- > Canada
- > Germany
- > United Kingdom

Delegations Hosted in Dayton Region

- > German American Chamber
- > Fujian Province (China)
- > British Department of International Trade, British Consulate, British Embassy
- > Royal Air Force Red Arrows
- > Israeli Foreign Military Financing Delegations
- > Air Force Research Laboratory (AFRL) Pitch Days
- > Air Force Life Cycle Management Center (LCMC) Pitch Days
- > Hubei Province (China)
- > Chinese Consulate



Governor Mike DeWine and First Lady Fran DeWine led a delegation of Ohio business leaders to Japan in fall of 2019.

AEROSPACE & DEFENSE

PROMOTING DEFENSE



DAYTON REGION MILITARY COLLABORATIVE

- > 50 partner organizations across the Miami Valley supporting initiatives at Wright Patterson AFB, Springfield ANGB and the Dayton VA



Led the 4th Annual Ohio Defense Forum

- > Included over 200 participants with speakers covering topics relating to the military installations across Ohio

The Dayton Region received over ...

\$570 M in FY 2019,
which is 88%
of the Air Force Research
Laboratory's contract
obligations in Ohio.



GROWING AEROSPACE

- > Co-sponsored the Air Force's Life Cycle Industry Days, bringing more than 1,000 people to Dayton to learn how their businesses can support Air Force needs.

- > Led the delegation representing Ohio at the Association of Unmanned Vehicle Systems International (AUVSI) Xponential Conference and Trade Show, highlighting the region's new beyond visual line of sight airspace and SkyVision technology.

- > Assisted the Air Force's Life Cycle Management Center's Dayton Pitch Day, awarding 23 companies more than \$15 million in funding.

- > Supported the Air Force Institute of Technology's 100th anniversary.

- > Promoted the Dayton Region's cyber initiatives and workforce initiatives.

- > A community partner supporting the Dayton Region Israel Trade Alliance (DRITA)

- > Hosted the 10th Annual UAS Midwest.

Hometown Heroes™

Number of tickets distributed to military members and their families:

- > The Big Hoopla/First Four: 8,100
- > Dayton Dragons games: 1,400
- > Victoria Theatre performances: 1,350
- > Military Appreciation Night Concert at The Fraze Pavilion : 3,000
- > Dayton Art Institute: 1,400



Above left: U.S. Rep. Mike Turner speaks at the Ohio Defense Forum in October. Above: Members of the U.S. Air Force Air Demonstration Squadron "Thunderbirds" salute during Military Appreciation Night at the Fraze Pavilion in June. Left: U.S. Rep. Warren Davidson leads a panel on workforce at the Ohio Defense Forum in October.

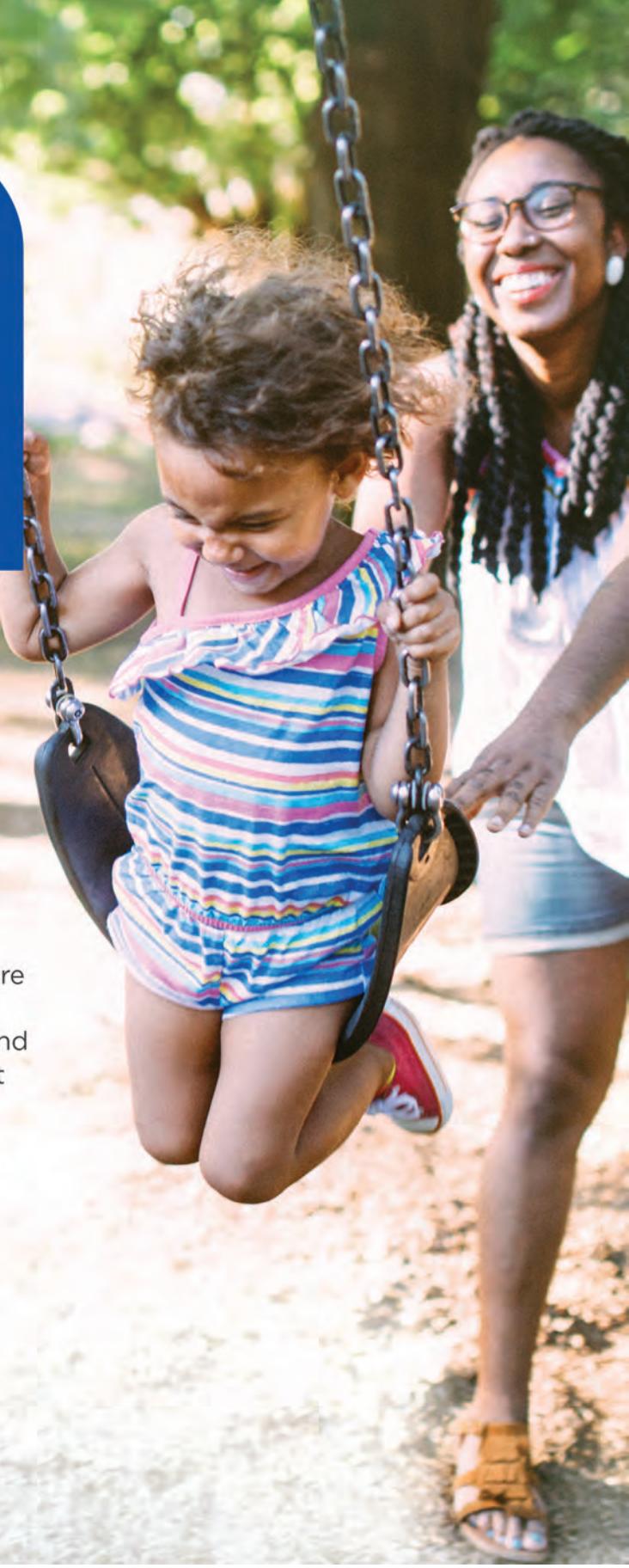
**Community
is the
commitment
we make to
each other**

When a community is strong, it's more than a collection of streets and buildings. It's a place that nurtures and helps its residents thrive. That's what happens when people share the commitment to make things better together. That's why we're proud to sponsor the Dayton Development Coalition Annual Meeting.



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OSCAR- NOMINATED FILMMAKERS HONORED WITH 2019 MAUREEN PATTERSON REGIONAL LEADER AWARD

**Dayton Development Coalition
honors Julia Reichert and
Steven Bognar.**

This year's Maureen Patterson Regional Leader Award honors Julia Reichert and Steven Bognar, documentary filmmakers who have spent their career giving voice to the ideals and people who form the backbone of the Dayton Region.

In their 2019 film *American Factory* Julia and Steven gave the world an intimate look into the first three years of Fuyao Glass America's redevelopment of General Motor's former Moraine Assembly plant. Bognar and Reichert chronicled the shuttering of the GM plant in their 2009 film *The Last Truck*.

Netflix described the film as, "a deep dive into a post-industrial Ohio, where a Chinese billionaire opens a new factory in the husk of an abandoned General Motors plant and hires two thousand blue-collar Americans. Early days of hope and optimism give way to setbacks as high-tech China clashes with working-class America."

The annual award is named for Maureen Patterson, who dedicated her career to the region's economic growth. The award honors an extraordinary leader in our community who, like Patterson, advocates for the community's economic health and growth.

"Films like *American Factory* and *The Last Truck* bring a compassionate, nuanced view of Ohio's industrial heart to many people who will never set foot in Ohio or near a factory," said Jeff Hoagland, the DDC's President and CEO. "They highlighted the hard work that goes into standing up a massive



Oscar-nominated filmmakers Julia Reichert and Steven Bognar filming the American Factory documentary.

manufacturing operation while navigating the cultural landscape created when Chinese and American employees build a new workplace. It's no surprise this compelling story has been nominated for an Academy Award."

In the two years since Reichert and Bognar turned off the cameras, Fuyao has continued to evolve. Their work in the community through programs such as "Connect Centerville" show how they are building broader regional relationships. Fuyao Chairman Cho Tak Wong's recent announcement of additional investment at Fuyao's Moraine facility demonstrates the company's commitment to the Dayton Region and Ohio, as well as its confidence in the region's workforce and business climate.

Maureen Patterson Regional Leader Award Honorees

- 2005: Lt. General (retired) John Nowak
- 2006: Dr. Daniel Curran
- 2007: Beverly Shillito
- 2008: Dennis Rediker
- 2009: Peter Luongo
- 2010: Dr. Benjamin Schuster
- 2011: Maureen Patterson
- 2012: General (retired) Lester Lyles
- 2013: Dayton Power & Light
- 2014: Pam Morris
- 2015: Dr. Daniel Curran
- 2016: Cho Tak Wong
- 2017: Dr. Anne Eiting Klamar
- 2018: Clay Mathile
- 2019: Julia Reichert and Steven Bognar

LOCAL TECH JOBS EXPERIENCE 16 PERCENT GROWTH

Tyler Technologies led the growth with 225 jobs

The Dayton Region saw strong growth in tech jobs in 2019, with DDC's JobsOhio projects experiencing a 16 percent jump in the number of technology jobs committed between 2017 and 2019. Combined with the continued growth at the Air Force's National Air and Space Intelligence Center (NASIC) at Wright-Patterson Air Force Base, and strong start-ups such as TJC Polymers and Xerion Battery, 2019 positioned the Dayton Region for continued high-tech growth.

2019 Tech projects represented about 20 percent of the committed new jobs, up from 4 percent in 2017. Companies such as Booz Allen Hamilton, JJR Solutions, Tyler Technologies, Traction on

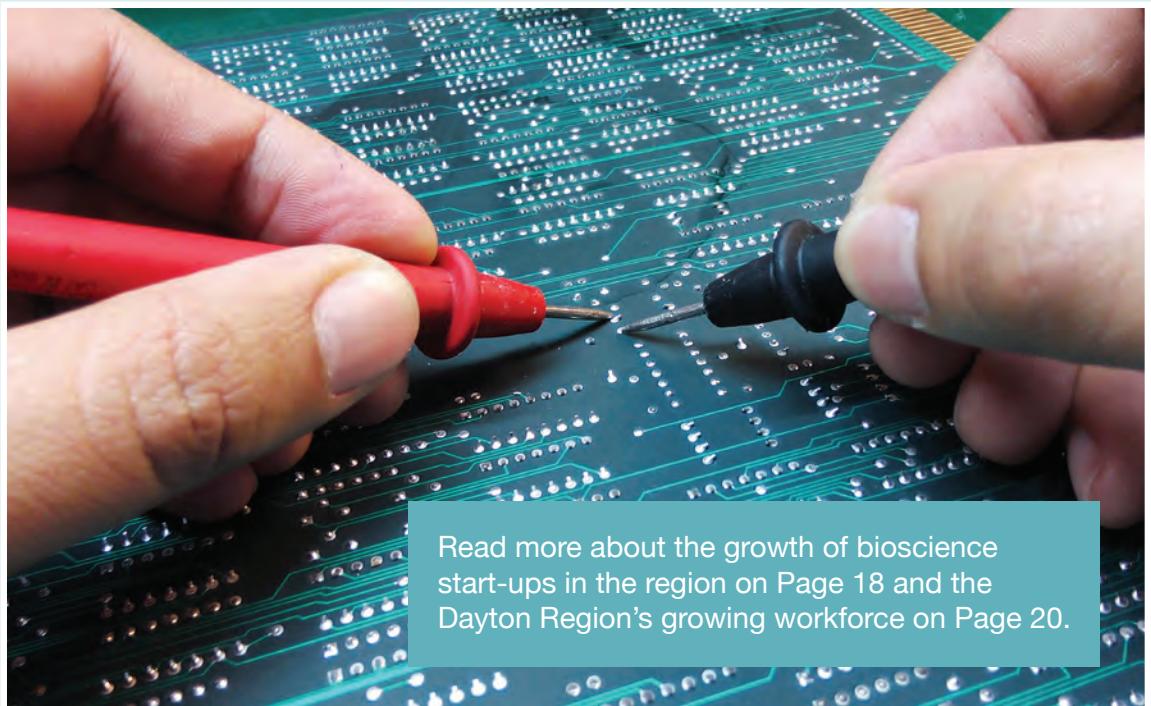
Demand, Oculii, Wurth Electronic, and Mile 2 committed to create nearly 500 new jobs.

"Since the recession, the DDC has worked to help businesses create jobs across a variety industries," said Jeff Hoagland, DDC President and CEO. "Dayton's economy will always have a strong manufacturing core, but we needed to broaden our economic base to include more jobs in tech, aviation and other fields."

NASIC has added hundreds of jobs in the last 15 years as the center grows its critical national security mission. Congress authorized \$182 million to build a new NASIC complex at Wright-Patt.

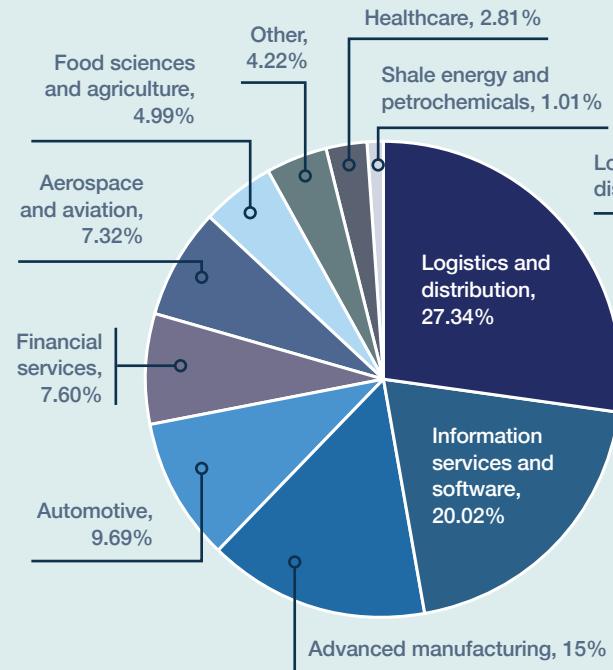
The industry growth extends beyond NASIC and the region's larger companies. The DDC's Accelerant Venture Fund 1 works with regional start-ups to provide funding and business coaching. High-tech start-ups Xerion Battery and TJC Polymers continue to grow and attract additional investment.

"Companies coming to and expanding in Dayton will find a skilled talent pool ready to support their needs," said Julie Sullivan, the DDC's Executive Vice President for Regional Development. "We want to make sure the highly skilled people who work in this field have plenty of opportunities in the Dayton Region to build a life-long career."

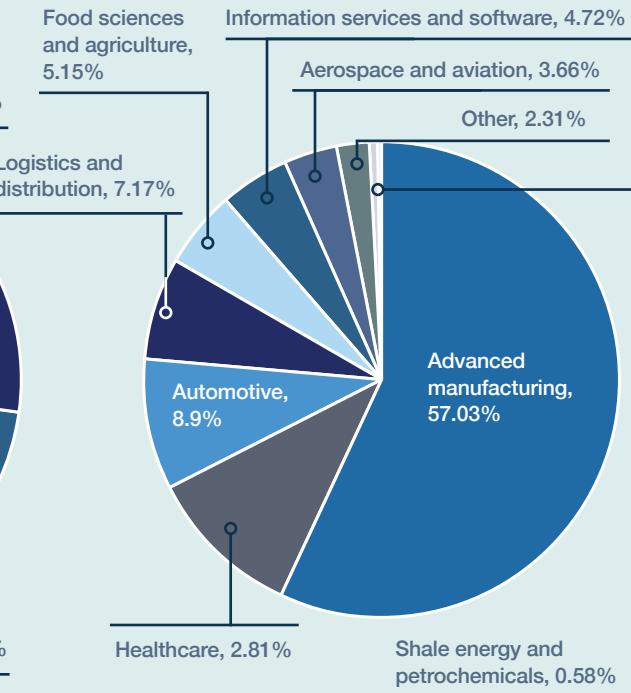


Read more about the growth of bioscience start-ups in the region on Page 18 and the Dayton Region's growing workforce on Page 20.

2019 JOBS CREATED



2017 JOBS CREATED



Upcoming Dayton Development Coalition Events

February 24: Workforce We Need Summit at the National Museum of the USAF

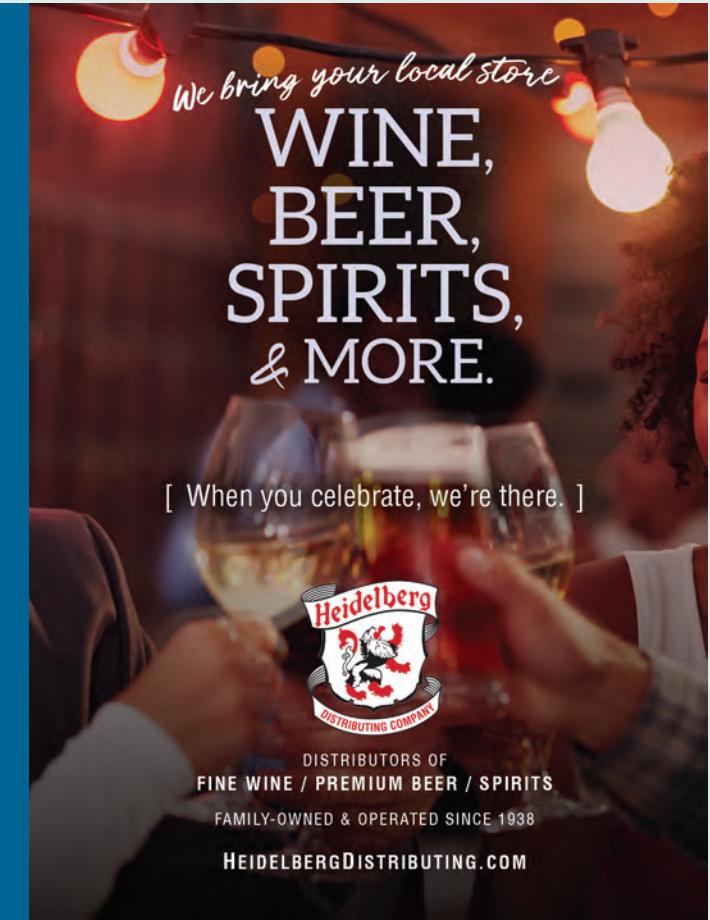
April 20-22: Community Leader Fly-In, Washington, DC

May 21: Springfield Air National Guard Base Community Day

June 15-19: Life Cycle Industry Days and Pitch Days at the Dayton Convention Center

July 15: DDC Investor Tour of WPAFB

For more information on DDC events, visit daytonregion.com





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SUCCESS STORY: CORNERSTONE RESEARCH GROUP

New Facility Supports Cornerstone's Commercialization Push

ABSTRACT: Cornerstone Research Group (CRG) announced a proposal to expand its current operations to a new facility while expecting to create 250 new jobs in the Dayton Region. The company's expansion initiative would open new opportunities for a variety of high-skilled jobs in the Dayton Region including software developers, aerospace engineers, electrical engineers, composite engineers, chemists, and manufacturing personnel.

COMPANY PROFILE: For over 20 years, Cornerstone Research Group has been trusted to provide innovative technology solutions to solve some of the nation's most challenging defense and aerospace problems. Founded in 1997 the small business has rapidly grown through strategic partnerships and advanced innovative technologies to deliver solutions for a large variety of applications including carbon composites, advanced batteries and power systems, electric propulsion and unmanned air vehicles. While staying true to the company's core values, their multidisciplinary team of scientists, engineers, and manufacturers have redefined what is possible in delivering new capabilities to the warfighter. Cornerstone Research Group and its subsidiaries are in Dayton, Ohio.

BUSINESS NEED: "The rapidly evolving Department of Defense acquisition landscape is creating significant opportunity for Cornerstone Research Group and the Dayton Region. With multiple technology products progressing towards procurement, we are excited to work with the Dayton Development Coalition, JobsOhio, and partners throughout the state to rapidly develop and deliver new capabilities to the warfighter and contribute to the success of the Dayton Region," said Chris Hemmelgarn, Vice President of Strategic Relations at Cornerstone Research Group. "This new facility will allow us to expand our manufacturing footprint for advanced defense products and create more opportunity for the region."

OHIO SOLUTION: The Dayton Region's strong defense infrastructure, paired with its expertise in advanced manufacturing, gives Cornerstone Research Group an ideal location for commercialization. A robust workforce and a network of support organizations that understand the unique challenges of defense firms stand ready to support their growth.

"Cornerstone Research Group represents a true Dayton Region success story. For over 20 years, their cutting-edge research has helped protect our military and defend American values across the globe," said Amy Schrimpf, Project Manager and Government Relations Director for the Dayton Development Coalition. "Our region has had a critical role in our country's defense for more than 100 years, and Cornerstone continues that strong tradition into the future. We're thrilled they plan to continue to grow in the region and look forward to supporting them as their project moves forward."

PROJECT STATS:

- > Location: Miami Township, Montgomery County, Ohio
- > Total capital investment: \$9.8 million
- > Jobs committed: 250
- > Jobs retained: 88
- > Collaborators: Miami Township, Montgomery County, Dayton Development Coalition and JobsOhio.



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COMPLIANCE
HEALTH RISK MANAGEMENT

PITCH DAY AWARDS \$15M IN FEDERAL CONTRACTS

Pitch Day will return to Dayton June 15-16, 2020

JobsOhio and the Dayton Development Coalition joined the Air Force Life Cycle Management Center (AFLCMC) as it awarded \$15 million in new federal contracts to medium-sized enterprises as part of the Air Force "Pitch Day" event hosted in Dayton, Ohio on November 13th and 14th, 2019. Pitches were tailored to help the military solve critical problems related to aircraft and weapons systems.

The Dayton Pitch Day was one of 12 across the country in 2019. David Shahady, the Air Force SBIR/STTR Program Director, told attendees that pitch days have made it easier for companies to tap into the SBIR/STTR programs while helping the Air Force get new technology into the field faster.

During the event, 23 companies pitched their products and services in front of nearly 600 attendees at Carillon Historical Park in Dayton, Ohio, all winning federal contracts. Speakers said the modern Air Force needs to move faster to equip airmen with new technology.

"We need to put technology in the field at the speed of relevance," said Gen. Arnold W. Bunch, Jr., Commander of Air Force Materiel Command. "We need to find the means to execute with speed and discipline."

"Pitch Days represents a huge win for Dayton and the Air Force," said Elaine Bryant, the DDC's Executive Vice President for Aerospace and Defense. "Pitch Days are an incredible opportunity for the Air Force, small and large industry partners, and the community to quickly source the latest in high tech solutions to our Airmen."

Improving technology such as condition-based maintenance, or parts that can signal maintenance crews for replacement before they break, and Advanced Battle Management Systems that allow for



Above: Brig. Gen. Ryan Britton, PEO for the Presidential & Executive Airlift, gives a keynote address during pitch days. Top right: Lt. Gov. John Husted meets with Ohio and U.S. Air Force leaders the JobsOhio Pitch Days booth. Below right: AFMC Commander Gen. Arnold W. Bunch, Jr. speaks to businesses at LCMC Pitch Days.

connectivity among aircraft, weapons systems and other technology, are critical to maintaining the Air Force's tactical edge.

"We are just looking for new, innovative ideas or technology advancements that small businesses are working on that we don't know about," said Daniel Annett, a member of the AFLCMC team that organized the Dayton event. "We want to bring these businesses forward to enlighten us on things they are doing and see if we can take the technology and transfer it onto our aircraft or weapon systems."

The Air Force Pitch Day events award contracts on-the-spot to companies and small businesses based on its streamlined

evaluation process of written proposals and in-person presentations. Interested companies seek contracts with the Air Force as well as follow-on investments to commercializing their products and technologies for use on aircraft or weapons systems. The inaugural Pitch Day event was held in March 2019.

According to the Air Force, AFLCMC, which is headquartered in Dayton, has an active budget that would be top ten on the Fortune 500 based on its current portfolio of \$279 billion.

"Pitch Days in Dayton offered the unique opportunity to connect private sector tech companies with one of their biggest customers that is right up the street,

Wright Patterson Air Force Base," said J.P. Nauseef, JobsOhio President and Chief Investment Officer. "Many of these innovative companies are now looking to establish operations in Ohio for the first time, and that's due to our proximity to the customer and venture capital, as well as the cost of doing business and quality of life here."

Ohio Lt. Gov. Jon Husted was on hand to share how Ohio can be a partner in their growth. JobsOhio offered matching grants to the companies looking to invest in the state.

The Dayton Region and Ohio have a long heritage of advancing aviation innovation, from inventing the airplane, the first drone

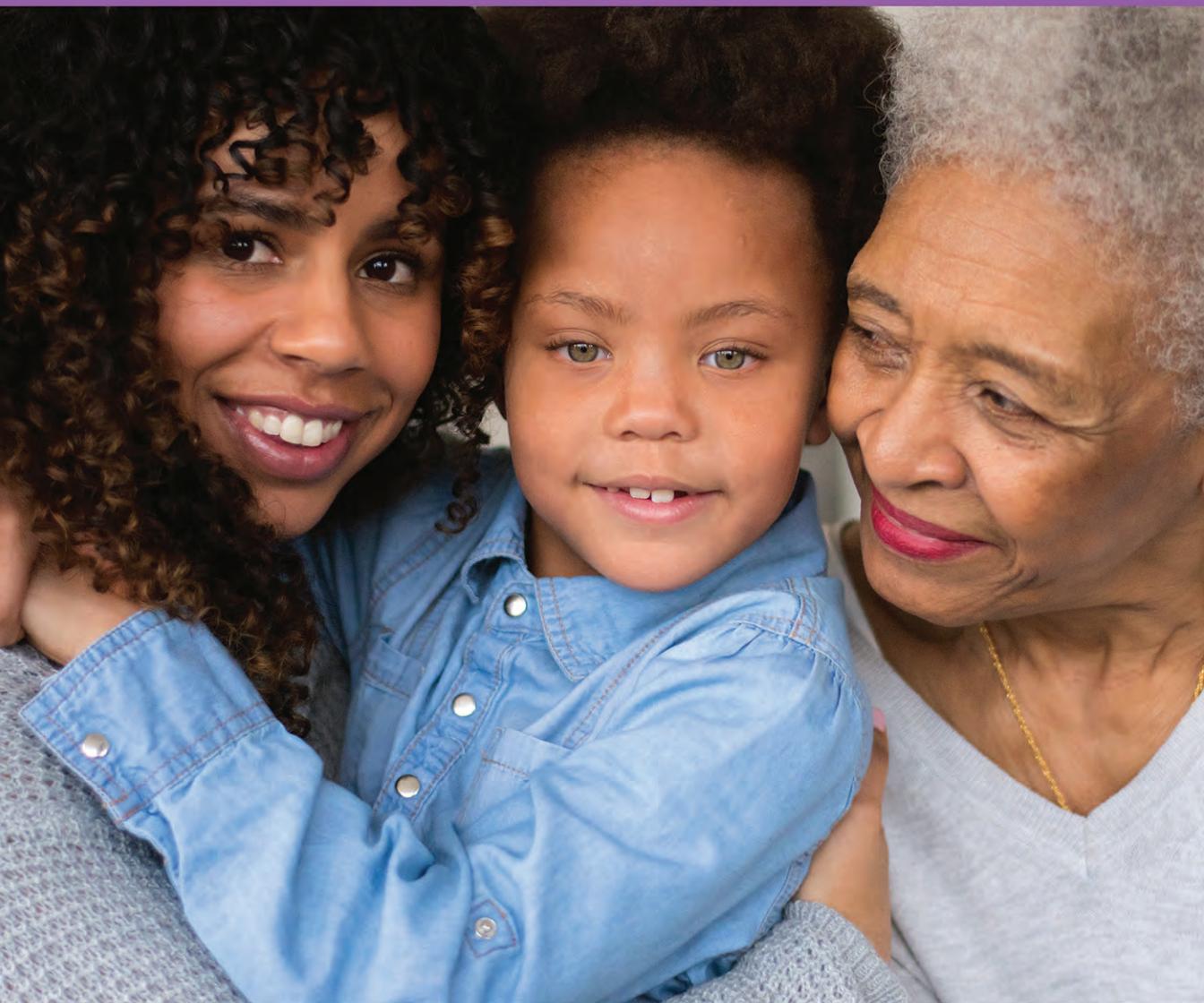


technology and the working ejection seat; to being the home of SkyVision, a mobile ground-based detect-and-avoid system that enables safe operation of unmanned aircraft systems (UAS) beyond visual line of sight and advanced aircraft technologies, which was developed by the Air Force Research Laboratory in collaboration with the Ohio UAS Center.

The largest single-site employer in the state, Wright-Patt has an annual regional economic impact of \$15.54 billion. With 30,000 people working on base and an additional 50,000 related jobs "outside the fence," the Air Force is a critical driver of Ohio's economy.

AFLCMC announced it would return to Dayton for another round of Pitch Days June 15-16, 2020.

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SUCCESS STORY: HENNY PENNY

New Innovation Center Anchors Henny Penny's Future Product Development

ABSTRACT: Henny Penny began construction on the largest expansion project in Henny Penny's 62-year history in October for a 150,000 square-foot expansion to its Preble County manufacturing facility. The new space will add 70 jobs and house an Innovation Center for new product development, automation and innovation and expand the company's manufacturing footprint.

COMPANY PROFILE: Eaton-based Henny Penny provides premium food service equipment solutions in more than 100 countries to high-volume kitchens, including QSRs and casual dining chains; healthcare facilities; supermarkets; and more.

BUSINESS NEED: "We're on an accelerated growth pace as we continue powering the world's most demanding kitchens," said Rob Connelly, Chairman and CEO of Henny Penny. "The expansion of our Eaton-based world headquarters with additional space for production, innovation and employee well-being sets us up for another 62 years of success."

"Our legacy is state-of-the-art production and making the lives of restaurant operators better by bringing them innovative solutions," said Steve Maggard, Henny Penny President. "This expansion will help us continue developing the world's most reliable, easy-to-use equipment."

OHIO SOLUTION: Henny Penny's long history in Preble County as a leading employer and corporate collaborative partner set a strong foundation for the company's Ohio growth. The project includes a 150,000 square foot expansion of Henny Penny's Eaton Building, a 35 percent increase of the company's current space. The project also includes a 25,000 square foot renovation of its Wagner Building. At completion, Henny Penny will have a total of 585,000 square feet on its 60-acre campus and more than 800 employees.

PROJECT STATS

- > Location: City of Eaton, Preble County, Ohio
- > Total capital investment: \$16 million
- > Jobs committed: 70
- > Jobs retained: 737
- > Collaborators: City of Eaton, Preble County, Dayton Development Coalition and JobsOhio



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DAYTON REGION BIOSCIENCE START-UPS THRIVE THROUGH INNOVATIVE PARTNERSHIPS

The collaborative spirit of the Dayton Region's healthcare industry helped advance Accelerant Fund 1 portfolio companies in 2019, creating partnerships that supported the innovative technology developed by Dayton Region companies.

"We've seen incredible interest among partners such as Kettering Health Network, Dayton Children's Medical Center and local hospice organizations in the technology coming from our start-ups," said Roger Edwards, DDC Vice President and General Manager of Accelerant.

Among the growing number of partnerships is Ischemia Care, LLC's lab at Dayton Children's Hospital in Franklin. The company developed a blood test to diagnose the cause of stroke and TIA, including atrial fibrillation, and recently completed pilot tests at Kettering Medical Center.

"These partnerships help our companies develop and test their products locally and give our local healthcare providers access to cutting-edge technology," said Steve Skerl, Chair of the Accelerant Investment Committee and Vice President, Treasury for CareSource. "They draw on our region's collaborative spirit to create a unique ecosystem for bioscience start-ups."

Healthy Roster has partnered with Dayton Children's and other medical groups to use its app that provides mobile patient engagement, care coordination, secure communication and outreach tools for athletic trainers in the field and sports medicine departments. The app, for example, helps parents, coaches and trainers coordinate care after a student athlete's injury.

P&C Pharma and IncludeHealth have created partnerships in the Dayton Region to test their products, as well. Dayton Children's Medical Director of Orthopedics serves as an advisor for AMB Surgical. AMB's FLYTE™ smart, automated growing rod technology was developed to reduce



Jeff June, CEO of Ischemia Care, works closely with the team on all aspects of commercialization for their advanced stroke testing, including laboratory operations

the necessity for invasive and repetitive surgery in children and teens with orthopedic deformities.

In 2019, IncludeHealth was awarded an AFWERX Phase 1 SBIR grant to develop and standardize next-generation fitness protocols for warfighters. IncludeHealth provides an integrated digital health and wellness ecosystem that pairs HIPAA compliant cloud software, health informatics sensors and inclusive functional training equipment.

Edwards hopes to grow the number of local start-ups working with the Air Force through SBIR, the Small Business Innovation Research program, which encourages small businesses to engage in federal research and development. Small businesses in the Dayton Region receive the majority of Air Force Research Laboratory (AFRL) SBIR funds coming into Ohio. That represents an opportunity for local start-ups.

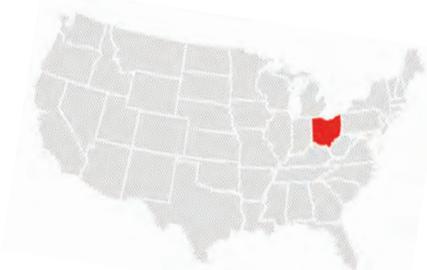
The Air Force Life Cycle Management Center (AFLCMC) and AFRL hosted Pitch Days in Dayton in November, highlighting the Air Force's desire to engage with small businesses in a new way. Edwards said the DDC will be working with local investors and start-ups to help bridge the communication gap that exists between the defense and start-up worlds.

"Investors see SBIR companies as an investment opportunity, and SBIR companies often need follow-on investment as they progress through the phases of the program," Edwards said. "We have the opportunity to build a unique ecosystem that supports these partnerships."



Wright-Patterson Air Force Base in Dayton, Ohio.

Ohio is Making Defense Stronger.



Welcome to Ohio, the home of Wright-Patterson Air Force Base, an epicenter of defense research and innovation and host to the F-35 HPSI Organization. Access R&D resources at Wright-Patterson, take advantage of unique test facilities at NASA's Glenn Research Center and Plum Brook Station, partner with defense installations across Ohio and be on the cutting edge of BVLOS flight.

Are you ready to change the future of defense? Learn how Ohio can help at JobsOhio.com.



PROGRAMS, SUMMITS AND PARTNERSHIPS GEARED TOWARDS TALENT NEEDS

DDC and region continue to support talent attraction

Talent needs drive nearly every economic development project the DDC supports, affect nearly every business in our region, and consistently top the list of concerns for business leaders nationwide.

The Dayton Region takes on talent attraction with its usual collaborative spirit, finding creative ways to connect businesses to potential employees and working with local partners to develop reliable training programs to create a steady pipeline of qualified job applicants.

In 2018, the DDC, the University of Dayton Center for Leadership and Miami Valley Human Resource Association (MVHRA) launched the first Dayton Region Talent Forum to share best practices among peers and empower organizations to have greater success in recruitment, retention, and engagement. Partners such as UpDayton and Southwestern Ohio Council for Higher Education (SOCHE), bring valuable insight into the war on talent.

Sometimes, companies need a customized program. DDC, JobsOhio, City of Dayton and Montgomery County worked with Mile Two to support their efforts to create a training program for cognitive systems engineering. The program will help bridge the education gap for employees without direct experience in the field.

For Wright-Patterson Air Force Base, recruitment is critical to the country's national security. The largest single-site employer in the state, Wright-Patt needs a steady stream of employees to keep pace with the base's growth. On Feb. 24, the DDC will host the "Workforce We Need" summit, connecting Air Force leadership with the state's higher education institutions to explore the development of degree and training programs that align with the base's workforce needs.



Top photo: Community leaders break ground on the Greene County Career Center's new facility for its Aircraft Maintenance program at Lewis A. Jackson Regional Airport. The 7,500 square foot facility will provide career opportunities in the aviation industry including Airframe Mechanic certification and Power Plant mechanic certification. Above: Talent attraction begins early. Maj. Gen. Carl Schaefer, Air Force Materiel Command Deputy Commander, speaks to local students at The Big Hoopla STEM Challenge in March 2019.

Julie Sullivan, the DDC's Executive Vice President of Regional Development, said businesses have an opportunity to extend the community's growth even further. Sullivan recently joined Montgomery County's Pathways to Prosperity effort to better understand how businesses can support industry-relevant curriculum. The national program helps communities create long-term dialogue between local employers and K-12 educators that build a relevant workforce pipeline.

In the spring, the DDC will launch a Talent Content Hub to give investor companies the tools they need to recruit, retain and train a strong workforce.

"Low unemployment and a complex media advertising landscape make recruiting a challenge for employers," Sullivan said. "We're lucky to have so many regional partners who can help companies navigate though it."

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and compassionate to
ONE ANOTHER

Ephesians 4:32 (NIV)

mind **BODY** spirit

Caring for the
whole person

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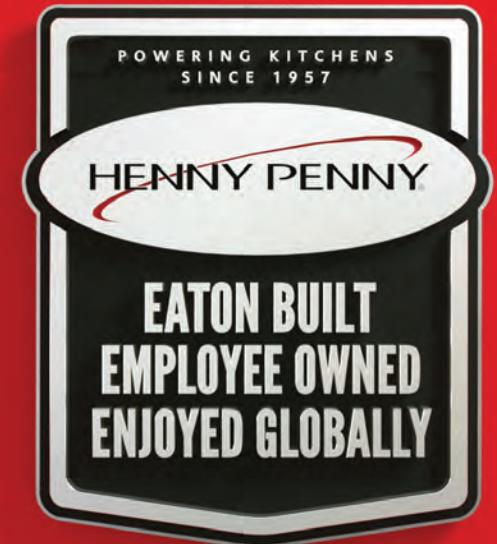
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SKYVISION LAUNCHED IN SPRINGFIELD TO TEST UAS

The U.S. Air Force, private companies and academic institutions have all conducted flights beyond the horizon in the skies above Springfield, leveraging one of Ohio's newest aviation assets for innovative testing and research in unmanned systems.

In April, the Federal Aviation Administration (FAA) confirmed a new technology developed in collaboration between Air Force Research Laboratory (AFRL) and the State of Ohio — called SkyVision — safely, accurately, and effectively allows unmanned aircraft systems (UAS or “drones”) to detect and avoid other aircraft while in flight. Simply put, SkyVision can be described as an air traffic control system for drones.

The validation of this aviation technology led the FAA to grant AFRL a certificate of authorization to test defense-related drone technology without reliance on a visual observer or chase aircraft. Typically, drones can only fly within the uninterrupted line of sight of the person operating the UAS, but this special waiver allows AFRL and the Ohio UAS Center, which is part of the Ohio Department of Transportation’s DriveOhio Initiative, to use SkyVision to test drones beyond the visual line of sight within a 200 square-mile parcel of unrestricted airspace near the Springfield-Beckley Municipal Airport.

Art Huber, AFRL Deputy Director of Operations, said, they have extended the operating airspace to the fullest extent of its range boundaries and hope to extend to the full extent of the altitude regime (from 5,000 feet to 10,000 feet) soon.

Huber said they have also started efforts to design and demo a fully mobile variant of SkyVision to enable BVLOS flights at other locations.

“As our country steps more and more into the unmanned age of flight, this technology is on the forefront of the aviation frontier, making Ohio a critical national asset for the research



Top: JP Nauseef, U.S. Rep. Mike Turner, U.S. Rep. Warren Davidson, Gov. Mike DeWine, Lt. Gov. Jon Husted, Scott Gardner, Jack Blackhurst, and Jeff Hoagland gather in front of SkyVision’s mobile unit on display in Springfield. Below: Gov. Mike DeWine examines a screen demonstrating SkyVision’s detect-and-avoid capabilities.

and development of UAS technology,” said Gov. Mike DeWine. “This also opens the door for commercial companies to work with Ohio, AFRL, and the FAA to test their own UAS-related technology using our SkyVision detection system. This is a major step in revolutionizing the transportation industry, with Ohio leading the way in aerospace, defense, and aviation innovation.”

2019 REGIONAL INVESTORS

The following companies show their support for the entire Dayton Region through their investment in the Dayton Development Coalition. Many of these companies dedicate volunteer leadership, as well as financial resources, to growing jobs and wealth in our community. Our work and collaboration is inspired by our common vision for the future of the Dayton Region.



PUBLIC SECTOR PARTNERS

The following public sector partners are committed to regional collaboration as a primary means to growing jobs and wealth throughout the Dayton Region. Each contributes time and financial resources to the Dayton Development Coalition's four economic development initiatives: Business Recruiting, Entrepreneurial Development, Retention and Expansion of our regional defense installations, and Regional Advocacy in Columbus and Washington, D.C.

Auglaize County	Beavercreek Township	City of Springfield
Champaign County	City of Beavercreek	City of Tipp City
Clark County	City of Brookville	City of Trotwood
Clinton County Port Authority	City of Centerville	City of Troy
Darke County	City of Clayton	City of Vandalia
Greene County	City of Dayton	City of West Carrollton
Mercer County	City of Fairborn	City of Xenia
Miami County	City of Huber Heights	Miami Township
Montgomery County	City of Kettering	Sugarcreek Township
New Bremen CIC	City of Miamisburg	Village of Minster
Preble County	City of Middletown	Village of New Knoxville
	City of Moraine	Wapakoneta Area Economic
	City of Oakwood	Development Council
	City of Riverside	Washington Township
	City of Sidney	



The DDC moved in to new offices in August, sharing a building with the Dayton Foundation and University of Dayton Fitz Center for Leadership in Community. Our new address is: 1401 S. Main St., Suite 200, Dayton, OH 45409.

2019 RESULTS

TERMS DEFINED: Committed jobs are positions committed by businesses the DDC team has worked with in the calendar year. Retained jobs are positions retained by businesses the DDC team has worked with in the calendar year. Capital investment are monies spent on buildings, equipment, or land by businesses the DDC team has worked with in the calendar year. Funding is defined as State and Federal funding supported by the region through DDC activities.

COMMITTED JOBS	2017	2018	2019	TOTAL
JobsOhio	2,078	3,880	2,752	8,710
COMMITTED JOBS				8,710
RETAINED JOBS	2017	2018	2019	TOTAL
JobsOhio	10,207	13,363	8,921	32,491
RETAINED JOBS				32,491
INVESTMENT	2017	2018	2019	TOTAL
Capital Investment	\$949.7M	\$854.8M	\$738.9M	\$2.5B
INVESTMENT				\$2.5B
FUNDING	2017	2018	2019	TOTAL
Targeted Federal Funding	\$25M	\$244.9M	\$25.5M	\$295.4M
State Capital	—	\$10.3M	—	\$10.3M
INVESTMENT				\$305.7M

Note: 2019 figures are subject to slight variation as the year is still in close out at time of print.



Above left: OneFifteen, a non-profit ecosystem dedicated to the full and sustained recovery of people living with opioid addiction, celebrated the opening of the first facilities within its state-of-the-art Dayton campus in June. OneFifteen, which was launched in 2019 by Kettering Health Network, Premier Health, and Verily, began seeing patients, as well, with clinical care provided by Samaritan Behavioral Health, Inc., a subsidiary of Premier Health. Above right: The DDC was honored as the Dayton Business Journal's Business of the Year in November.

WHY ARE THERE LEGOS ON OUR TABLE?

Connect. Innovate. Grow.

In 2019, those terms stood for more than economic development. In a year that saw catastrophic storms and horrific violence, the Dayton Region responded with compassion, strength, and resiliency.

We drew on our region's core strengths. We saw our community unite to connect people to resources to help them in their recovery. People found innovative ways to support victims by creating new programs and fundraisers to get resources to those in need.

And, we continued to grow as a community. Beyond jobs and the economy, we grew stronger, more compassionate, and proud of our community's response to unexpected tragedy.

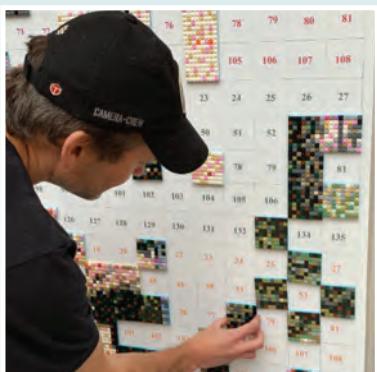
We move forward as we rebuild.

This year, the DDC wanted to create an experience for our guests that represents the strength and unity that defined 2019. In partnership with Brixilated, we will create a Lego mural that will hang in the DDC's offices.

Inside the boxes on your table, you will find a small kit that contains the pieces to build a small square of that mural.

Take a few minutes and assemble a kit, and then take your square to the Brixilated table near the entrance.

Find your square's coordinates listed on the instructions and place your square in the mural. More kits are available if you run out. Just ask a member of the Brixilated team.



Contact the Dayton Development Coalition at

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Dayton, OH 45409

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sites@daytonregion.com

937.222.4422