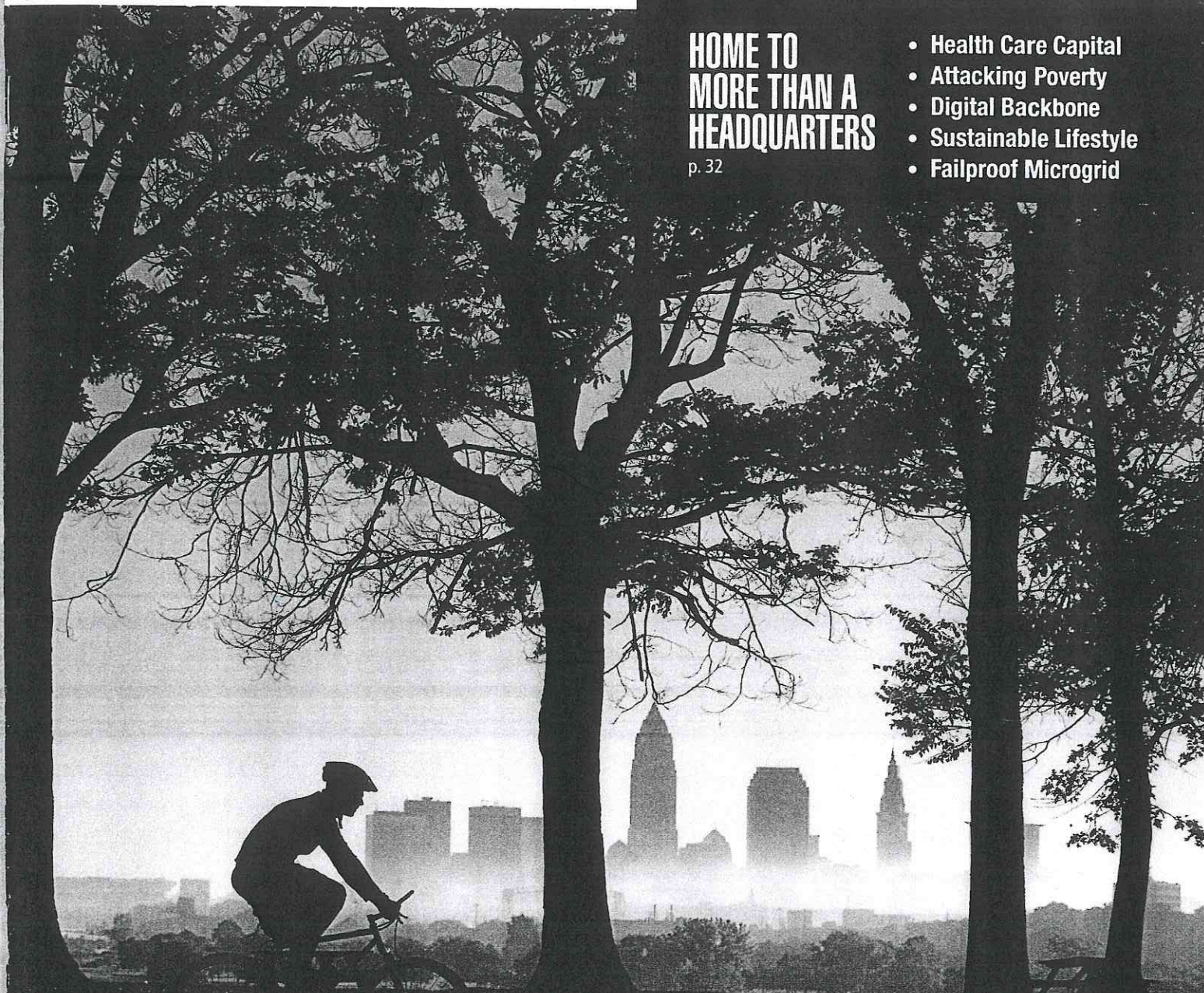


# AUTHENTICITY

## HOME TO MORE THAN A HEADQUARTERS

p. 32

- Health Care Capital
- Attacking Poverty
- Digital Backbone
- Sustainable Lifestyle
- Failproof Microgrid



### INCENTIVES

**Incentives of More Than \$3.5 Billion**

### LABOR FORCE AND WAGES

**A Diverse, Educated Workforce**

### LOGISTICS AND TRANSPORTATION

**Easy to Get to, From and Around**

### CULTURAL AND COMMUNITY FIT

**Affordable and Amenity-Rich**

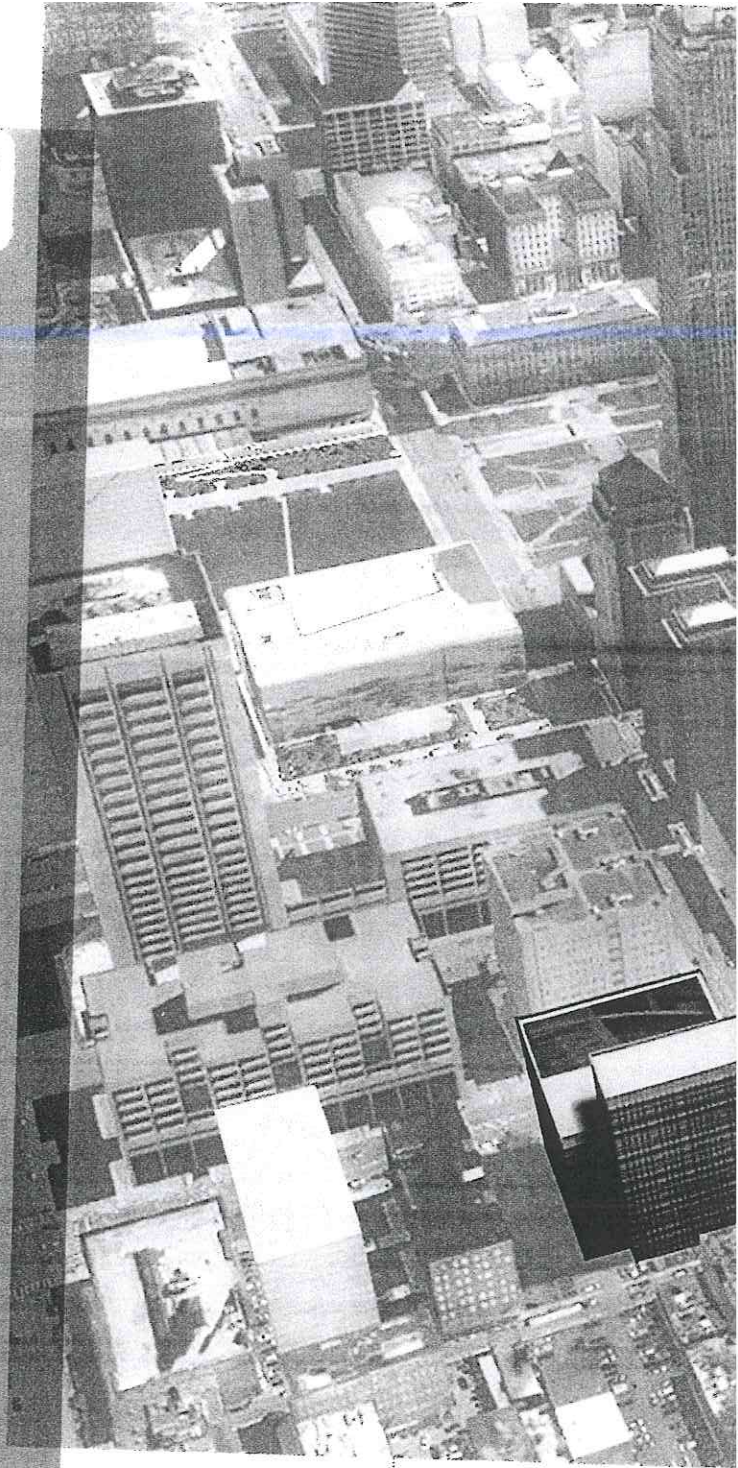
*Cleveland*

# AMAZON HQ2 IN CLEVELAND

This proposal provides Amazon with the singular opportunity to develop an urban community in the heart of a compact, walkable and amenity-rich downtown bookended by the Cuyahoga River and Lake Erie. Our site features:

- **Initial build-out** (shown at right) of up to an estimated 4.7 million square feet of office space, including 877,000 square feet of existing space to accommodate Amazon's immediate needs and an additional 3.85 million square feet of new, build-to-suit construction. This site is unique in its centrality to downtown Cleveland, its proximity to rapid transit and the opportunity to expand from the core to reach the Cuyahoga River and Lake Erie waterfronts.
- **Unrivaled development flexibility** to expand beyond the initial build-out and to reach an estimated total over 10 million square feet, exceeding the required 8 million square feet and 100 acres for office space. These sites are either connected or within a short walk of the initial build-out.
- **Mixed-use waterfront development** along the Cuyahoga River and Lake Erie waterfronts to meet additional demand for downtown housing, shopping, restaurants, entertainment venues, bicycle and walking trails, and waterfront parks.

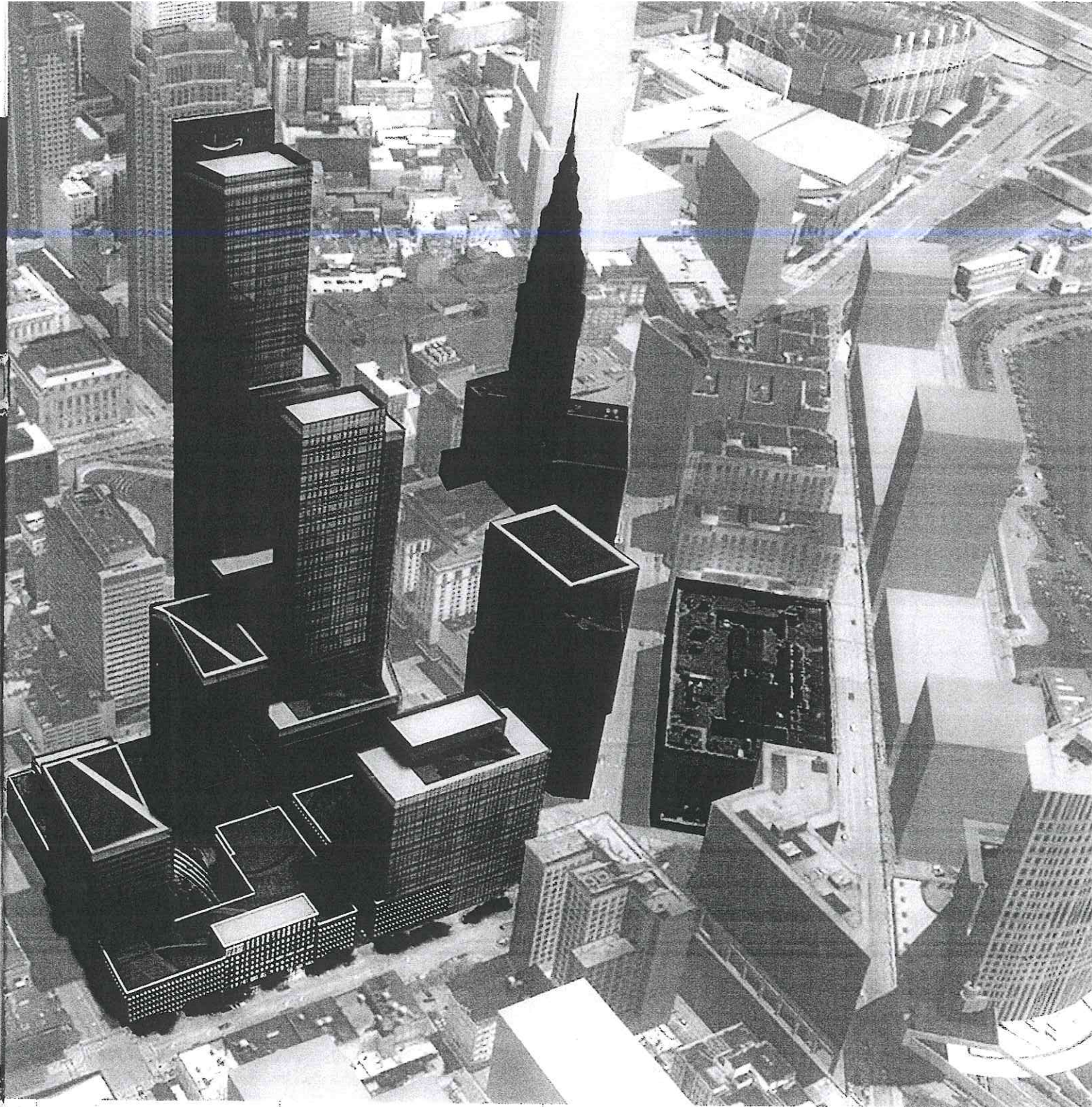
For more information and visuals on the initial build-out and the expansion opportunities, see pages 4-7.



## FIRST IMPRESSIONS

More than \$3.5 billion in financial incentives from the City of Cleveland, Cuyahoga County, JobsOhio and the State of Ohio

A highly educated, diverse workforce, with skilled workers growing at one of the fastest rates of any metropolitan area in the nation



One of the fastest, most connected and secure business-centric fiber networks in the United States, offering download speeds of up to 1-gigabit per second

One of the most attractive cost of living and cost of doing business profiles among metropolitan areas in the United States

Unparalleled health care and medical capabilities and institutions, including the Cleveland Clinic, University Hospitals, the MetroHealth System, Case Western Reserve University's School of Medicine, and the Global Center for Health Innovation

Metro-area commute time of just 23.1 minutes and extensive downtown transportation assets, including air, rail, bus, car, bicycle and walkability



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APPENDIX

Please consult the Appendix for additional details  
on each topic and for supporting documents.

To access a digital version of this proposal with added features, go to <https://www.cle-authentic.com/>  
Pass:216HQ2CLE!

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# CLEVELAND IS A CITY SHARPLY ON THE RISE.

**T**here's authentic momentum here, rooted in a great and storied history, and ignited by recent major developments that have accelerated our growth, provided new opportunities to our citizens and created a sense of confidence and readiness for what comes next.

So what's our story? It's a combination of factors, driven forward by many of the critical elements you'll see included in the RFP response. At its core is tremendous investment and development throughout our city and neighborhoods, to the tune of \$8 billion in downtown alone in the last 10 years, and \$33 billion throughout Northeast Ohio just since 2009. By any number of metrics, Cleveland is a city with formidable momentum.

We are a community where companies, organizations and individuals thrive, and a national model for public-private partnership that has demonstrated the ability – time and again – to tackle major initiatives and be agile and move with velocity when we see significant opportunity.

There are many areas where we authentically shine and distinguish ourselves from the rest:

- **Health care** – We're the medical capital of the United States, home of the Cleveland Clinic, the Global Center for Health Innovation and many other world-class health care institutions and innovation hubs, with more than 230,000 employed in the health care industry here in Cuyahoga County alone.
- **Solutions** – Only in Cleveland, the UnifyProject is leveraging the power of big data to create a sustainable investment system that will redefine health and drive solutions to poverty.
- **Innovation** – 22 Fortune 1000 companies call our community home, NASA has a major presence here, and we were among the first U.S. cities to invest in a 100-gigabit digital backbone.
- **Livability** – Cleveland's combination of cultural, physical and recreational amenities (such as the nation's second-largest performing arts center, a northern border that is the world's largest freshwater resource, and the nation's largest metropark system), married with our affordability, easy access and extraordinary diversity among our people, make this a place that people want to call home. And that they don't want to leave.
- **Resilience** – If the power (electric, heat, cooling, internet) goes down elsewhere in the country due to a natural disaster, cyber strike or physical attack, Amazon will still be fully operating in Cleveland, thanks to the nation's only district-wide microgrid, supplemented by a secure facility 2,000 feet underground.

Cleveland is ascending. Cleveland is a growth stock. Cleveland is a champion. Cleveland has swagger. Cleveland is authentic. And, at the center of our city, we've been saving the best place for the right partner. We believe that's you.

Come see our authenticity and our strength, our people and our character, our assets and our ability to help you accelerate. Cleveland would love to welcome Amazon, and together create a vibrant, thriving and exciting future.

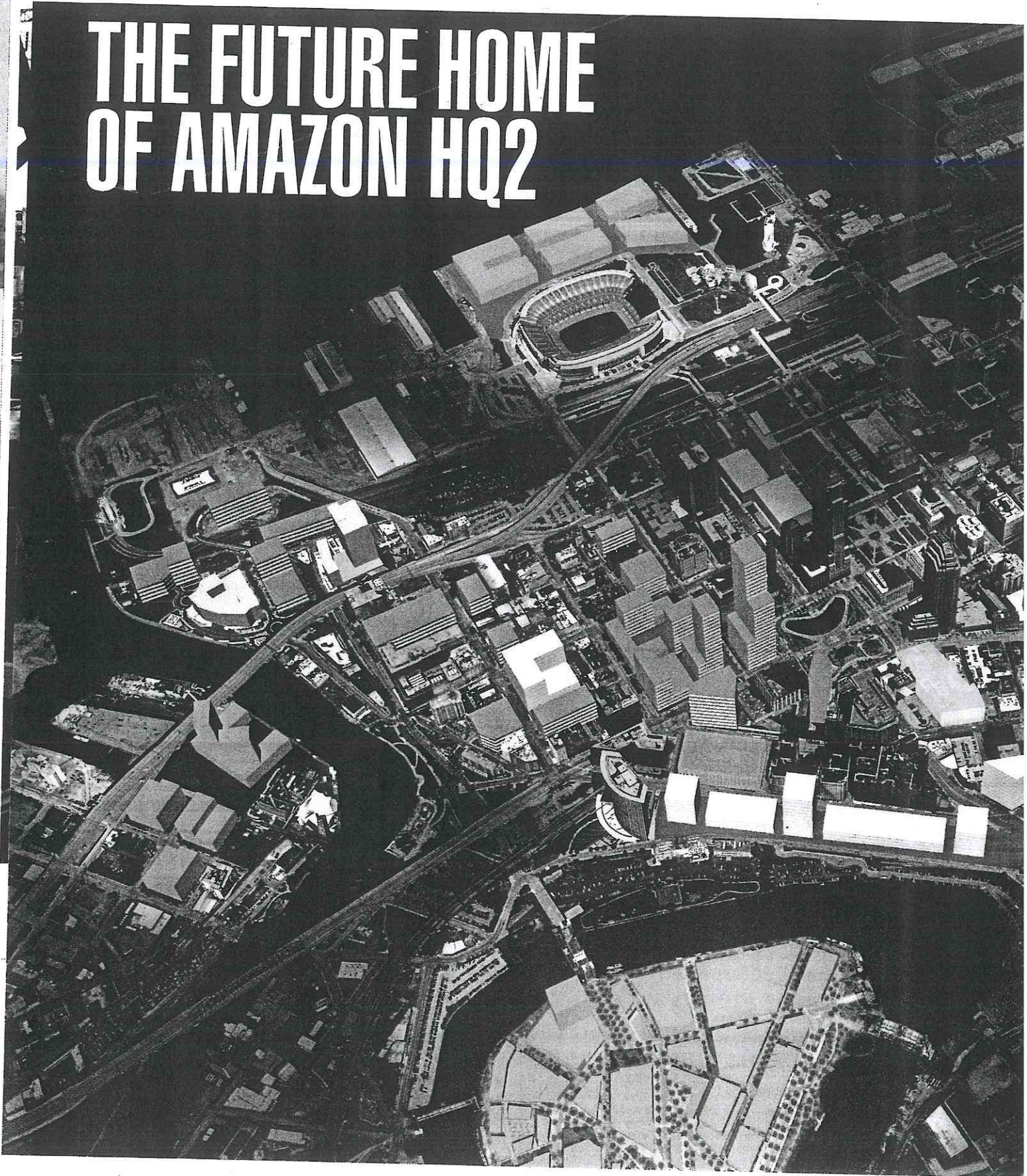


Frank G. Jackson  
Mayor, City of Cleveland



Armond Budish  
County Executive, Cuyahoga County

# THE FUTURE HOME OF AMAZON HQ2



00006



# 1 Initial Build-Out

Amazon HQ2 will operate in the urban core of one of the nation's most recognized resurging cities and benefit from 877,000 square feet of existing space that can accommodate Amazon's immediate needs. Initial build-out will be operational while development of an additional 3.85 million square feet of new construction can take place on adjacent development-ready sites.

The core site engages directly with the \$50 million Public Square project, our city's preeminent civic space. The core site also integrates into downtown's Historic Warehouse and Gateway districts, which feature an array of housing, dining and nightlife. The core site houses the heart of the regional transit system, with three passenger rail lines at Terminal Tower and all major bus routes converging at Public Square.

# 2 Expanded Site

The expanded site continues to build around the region's transit hub and connects to the core site either by a short walk or our city's Healthline, a nationally renowned bus-rapid-transit line on Euclid Avenue. Amazon will expand onto properties overlooking the Cuyahoga River and into iconic buildings that qualify for the Ohio Historic Preservation Tax Credit and Federal Historic Tax Credit.

# 3 Amazon Villages

Downtown Cleveland's location along the Cuyahoga River and Lake Erie allows Amazon the ability to establish new, complementary live-work-play communities on our two waterfronts.

The downtown lakefront, Scranton Peninsula and Flats West Bank offer unique opportunities to develop extensive residential and mixed-use waterfront neighborhoods that will provide ideal housing, extensive bicycling paths and trails and amenities for the thousands of Amazon employees.

# 4 Additional Development Opportunities

As Amazon's business needs continue to grow and diversify, our plan offers HQ2 the ability to further expand its footprint, with up to an additional 3.1 million square feet available for commercial and mixed-use development.

Remaining infill sites located throughout the Historic Warehouse District would further entrench Amazon's presence in the historic neighborhood, while additional sites in the Flats East Bank district – which has seen nearly \$500 million in mixed-use development to date – would stretch the company's footprint to the mouth of the Cuyahoga River.

# THRIVING DOWNTOWN THAT CELEBRATES ITS UNIQUENESS AND EMBRACES AMAZON

HQ2 will capitalize on a downtown that is far more than Ohio's largest central business district. It is a rapidly growing neighborhood that will reach 20,000 residents by the end of 2020, providing the diverse, welcoming, walkable and amenity-rich environment that today's highly skilled workers demand.

**A**s part of the initial build-out, HQ2 will become part of the historic Post Office Plaza and Terminal Tower Office Complex, the iconic center of our burgeoning downtown. Completed in 1930, its grandeur has been restored as it presides over Cleveland's resurgence. The Terminal Tower, pictured at right, is our mass transit hub as well as a terminus for the Healthline, which links the city core to University Circle, the home of globally renowned Cleveland Clinic, University Hospitals, Case Western Reserve University, the Cleveland Museum of Art and the Cleveland Orchestra.

After a historic 2016 – hosting the Republican National Convention, the World Series, the NBA Finals and more than 1 million people gathering to celebrate the Cavaliers' first NBA championship – our downtown continues its \$8 billion development boom. We added 1,000 apartments to the market in 2017, with another 3,300 projected over the next three years.

Major employers like Key Bank, Sherwin-Williams, Medical Mutual of Ohio, Ernst & Young, Quicken Loans and IBM continue to grow, invest and add jobs in downtown Cleveland. No wonder the national and international media lauded downtown Cleveland as a city on the rise.

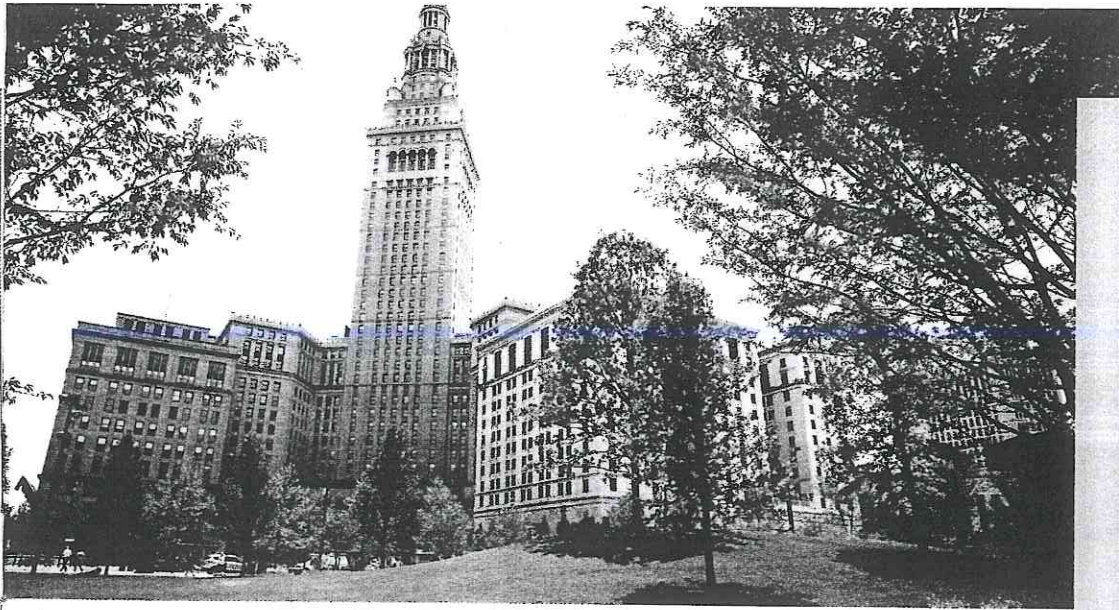
## Transforming Our City

Our city is reinventing itself from the inside out, presenting Amazon with a rare opportunity to join a business community and public sector renowned for their collaboration. Our private and public sectors work together to complete major projects, including the Huntington Convention Center, Global Center for Health Innovation and Flats East Bank riverfront development. We are improving our school system through the collaborative Cleveland Plan, where business, community, education and philanthropic leaders are working together to improve our public and charter schools. While the initial build-out of HQ2 will immediately bring Amazon into the downtown Cleveland community, the full build-out will continue to integrate Amazon with our city and the transformative projects that are sprouting throughout the city core.

The collaborations are fueling continued large-scale catalytic investments in our central business district including the \$140 million renovation of Quicken Loans Arena; nuCLEus, a \$400 million mixed-use development adjacent to Quicken Loans Area; Phase III of the \$500 million Flats East Bank riverfront development; the \$55 million Beacon Tower, a 20-story apartment tower on historic Euclid Avenue; and a \$135 million, 30+ story apartment tower in the Playhouse Square theater **000008**

- HQ2 becomes part of the historic Post Office Plaza and Terminal Tower complex located in the heart of downtown
- Public transit hub located in initial build-out
- 2 million workers within a 45-minute commute of downtown
- 95,000 downtown workers and 15,000 downtown residents, more than any Ohio central business district
- \$8 billion in downtown investment from 2010 to 2017
- 4,900 hotel rooms added since 2010
- 20,000 hotel rooms within an hour's drive of downtown





## WATER FRONT TO AMAZON

Cleveland's ability to embrace its heritage while attracting new investments from local and national interests has led to an impressive combination of urban vitality, commercial resurgence and high quality of life. HQ2 would be at the heart of our city and Amazon employees would immediately feel right at home.

### Enjoying Our Creative Culture

Cleveland's quality of life is enriched by our robust arts and culture assets and downtown is in the heart of it all. Playhouse Square is home to the second-largest performing arts center in the United States, the Tony Award-winning Cleveland Playhouse, the Cleveland State University School of Performing Arts, and IdeaStream, a unique collaboration between Cleveland NPR and PBS affiliates. It will also be the future home of Cleveland State University's new film school, the first of its kind in Ohio, and is just a few blocks away from the new proposed home of Amazon University (see Higher Education and Partnerships section for more information).

### Linking Our Neighborhoods and Waterfront

The city's development and heritage are inextricably linked to Lake Erie and the Cuyahoga River, and HQ2's Amazon Village and additional development opportunities make optimum use of our waterfront. The views of our lake and winding river are among the most picturesque on the nation's north coast. A rich base of restaurants, entertainment venues, hotels and housing has sprouted along the waterfront, with billions of additional investment to come. The Flats East Bank is a \$500 million mixed-use riverfront development that includes over 240 apartments and numerous restaurants and entertainment venues.

Our city core is surrounded by historic, walkable neighborhoods within a short bicycle, bus or rapid transit ride of downtown employers. These architecturally and culturally rich neighborhoods embrace the city's immigrant heritage by attracting a new diverse generation of young, skilled workers. Burgeoning neighborhoods like AsiaTown, Detroit-Shoreway, Ohio City and Tremont are within walking or bicycling distance of Lake Erie and the Cuyahoga River. In addition, a series of bicycle trails and waterfront parks connect the Amazon site to Edgewater Beach, the Cuyahoga Valley National Park and the neighborhoods.

### Building Networks and Connectivity

In 2015, Cleveland became the first city in the U.S. with a commercially available 100-gigabit fiber network. This fiber network offers businesses download speeds of up to 1-gigabit per second. Additional recent network advancements include a \$325 million upgrade to communications networks, 165 LTE upgrades to cell sites, eight Outdoor Distributed Antenna System projects to improve street-level mobile coverage and capacity, and Voice-Over-LTE, which allows for higher-quality calls, video calling and enhanced messaging services. The initial build-out is served 24 hours a day, 365 days a year by energy utilities, Cleveland Public Power and First Energy, which deliver reliability and sustainable solutions.  000009

## Uniquely Cleveland

### Microgrid Will Provide 99.999% Reliability and Energy Security With Clean Energy

Cleveland plans to provide a clean, reliable, cost-effective and sustainable microgrid to Amazon's HQ2. Our microgrid will be based upon a localized utility infrastructure that uses distributed generation, a large combined heat and power (CHP) facility, and wind and solar energy. Cleveland's microgrid will provide cost-effective energy security and 99.999% reliability.

Cleveland Public Power, our local municipal electric distribution utility, has capacity for underground line extension. District energy provider Cleveland Thermal has just converted its coal-fired power facility to natural gas and will have the capacity to produce 50 MW of clean electricity through a CHP plant it is building downtown. Cleveland's access to inexpensive natural gas from the Utica and Marcellus Shale formations allows for long-term, cost-effective power generation. Ultimately, the microgrid will complement and be able to call upon the unique Lake Erie Offshore Wind project for power.

Through a partnership among city and county government, local universities, foundations and power companies, we are excited to be able to provide Amazon with the ability to disconnect from a regional power grid in times of energy disruption and remain connected to an "island" mode of energy, which will greatly enhance the energy security of Amazon's entire operation.

# WORLD-CLASS HEALTH CARE

The Cleveland Clinic, along with University Hospitals and the MetroHealth System, anchors one of the world's most respected communities for health care delivery and innovation.

# A SERIOUS COMMITMENT TO YOUR SUCCESS

As a powerful sign of our state- and community-wide commitment to Amazon, the State of Ohio, JobsOhio, City of Cleveland and Cuyahoga County are offering an incentive and resource support package of more than \$3.5 billion in program funds, grants and tax incentives. The structure of the incentive package provides maximum flexibility for Amazon to help build, hire and establish a thriving HQ operation in Cleveland, Ohio. Our package is targeted at driving efficiencies and lowering the capital expenditures and operating costs for HQ2.



**W**hy Ohio? Discoveries are seeds of innovation that grow into further opportunity. Cultivated by its dedicated, loyal and resourceful people, the spirit of discovery is alive in Ohio. Invention, innovation and state-of-the-art initiatives are foundational elements of Ohio and every business and technology that calls Ohio home, and Cleveland is known as the City of Innovation and Industry.

This is why the State of Ohio, JobsOhio, the City of Cleveland and Cuyahoga County have all committed to providing unprecedented incentives to encourage and support Amazon's venture here, ranging from job attraction efforts to facility costs and transportation improvements to R&D expenditures. This partnership is unique in that it includes the public sector at the state, county and city levels, as well as JobsOhio, a private, nonprofit corporation designed to drive job creation and new capital investment in Ohio through business attraction, retention and expansion efforts.

Our total incentive package of more than \$3.5 billion is based on the creation of 40,600 jobs with \$4.06 billion in created payroll and \$4.6 billion in fixed asset investment by December 31, 2028.

#### **JobsOhio Program Funds: \$250 million**

#### **Talent Acquisition Services: \$50 million**

Strategic success increasingly depends on competitive advantage in talent markets. Amazon is an "employer of choice" nationally, and will certainly be such in the state of Ohio. Each of the talent elements outlined in the Appendix incorporates the competitive advantage into the design, with the expectation of drawing candidates nationally and from across Ohio. JobsOhio is offering up to \$50 million in funds. Amazon has the flexibility to apply talent's available options as it chooses, over a three-year service delivery period.

## ONLY CLEVELAND...

### Ohio & JobsOhio

- Program funds of up to \$1.55 billion from the State of Ohio and JobsOhio

### City & County Incentives

- Direct incentives of up to \$803 million from the City of Cleveland
- Direct incentives of up to \$646 million from Cuyahoga County
- Direct incentives of up to \$326 million from other local government jurisdictions
- Additional \$200 million from Cuyahoga County for microgrid

# \$3.5 BILLION

incentive package that is flexible and aligned with Amazon's objectives



#### **Program Funding: \$200 million**

JobsOhio is offering up to \$200 million in program funds to provide Amazon ultimate flexibility in addressing areas of potential risk and increasing speed to market. Amazon can apply the funds to any of the following options based on preference. Each of the programs is reimbursement-based and has already been approved by the JobsOhio Board of Directors. Reimbursement must be requested before December 31, 2025.

**JobsOhio Economic Development Grant (JOG):** Focuses on assisting Amazon with the project's fixed asset investments by providing flexible, up-front capital. Eligible uses include building, land and infrastructure.

**JobsOhio Corporate Relocation Grant:** Includes funds offered to Amazon to pay for employee relocation to the selected site. Eligible uses of funds include moving services, airfare and mileage, and short-term hotel.

**JobsOhio Research and Development (R&D) Grant:** Fosters the development and commercialization of emerging technologies and products. Eligible uses include engineering services, supplies, research and development payroll, and machinery and equipment.

**JobsOhio Revitalization (JORG) Grant:** Helps address the additional cost burden of selecting and rebuilding underutilized or vacant properties. Eligible uses include demolition, building renovation, site preparation, infrastructure, asbestos and lead-based paint abatement, environmental testing and remediation; and lab fees.

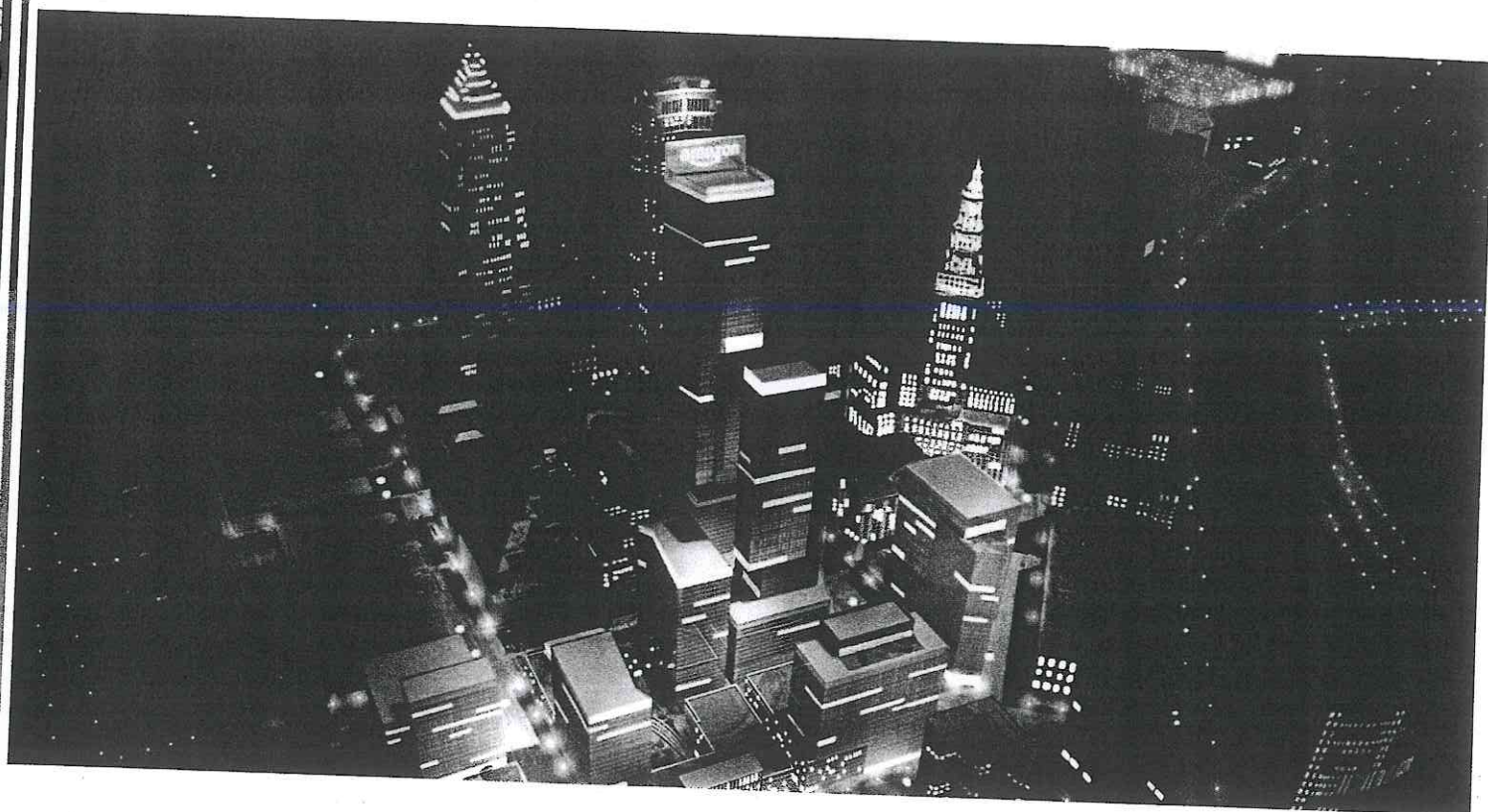
#### **State of Ohio Incentives: \$1.01 billion – \$1.35 billion**

The State of Ohio is offering up to \$960 million for the company's initial ramp-up of 23,200 new positions by December 31, 2025, and up to \$1.01 billion in program funds with the package's full potential value estimated up to \$1.35 billion for the full ramp-up of 40,600 new positions over 15 years.

**Ohio Job Creation Tax Credit (JCTC):** Ohio's competitive advantage, JCTC is a performance-based incentive that would reimburse Amazon annually at 3.402% of created Ohio payroll for a term of 15 years, estimated at \$960 million. JCTC's value is first applied to the company's Commercial Activity Tax (CAT) and any remaining balance is awarded in the form of a check to the company. The credit is uncapped, increasing in value as the company generates additional eligible Ohio payroll. If Amazon were to create 40,600 positions and \$4.06 billion in payroll by year 10, the credit could produce an estimated total value of \$1.35 billion. Public approval by the Ohio Tax Credit Authority (TCA), which meets monthly, is required prior to the credit beginning on January 1, 2019.

**Roadwork Development (629) Grant:** Provides up to \$25 million over five years for public roadway improvements, including engineering and design costs. The grant funds up to 75% of eligible project costs. Public approval by the State Controlling Board, which meets monthly, is required.

**Ohio Department of Transportation (ODOT) Funding:** Offers up to \$25 million to support Amazon's transportation requirements. Project funding is specific to infrastructure needs. The offer of funds does not require further approval or legislative action.



**City of Cleveland Incentives: \$698.7 million – \$803.6 million**

The City of Cleveland will offer Amazon an incentive package with an estimated total base value of up to \$803,643,612. The incentive is performance-based and will increase in value as Amazon's job creation and capital investment in Cleveland exceed initial estimates.

**Direct Incentive:**

**50% Wage Tax Credit for 15 years – \$489.4 million**

**Cleveland Income Tax Credit:** The City of Cleveland will provide a refundable income tax credit of 50% of the income taxes paid by Amazon employees to the City of Cleveland. This tax credit is valued at 1.25% of the created Cleveland payroll for a term of 15 years. Based on the estimates provided to the City, the City estimates that the incentive is valued at \$489,375,000. This incentive is not capped and may increase if the total payroll increases over the term.

**Direct Incentive:**

**Tax Increment Financing Rebate Program – \$209.3 million – \$314.2 million**

**Property Tax Rebate:** The City of Cleveland will utilize its municipal authority to establish a Tax Increment Financing (TIF) program that will provide Amazon with an annual rebate of all local overlapping subdivisions, non-school property tax payments for a period of 30 years from construction of the estimated capital improvements. In 2017, the non-school share is approximately 39.399%. These funds will be distributed to Amazon or any designee and will be used for purposes designated by Amazon towards the costs of Amazon's location in Cleveland.

Based on building requirements provided, the City estimates the total value of the incentive to be at minimum \$657.4 million (at \$400/SF construction costs) up to a maximum of more than \$986.8 million (at \$600/SF construction costs). Utilizing these estimates, the City's direct investment of TIF program funds over the 30-year term is at minimum \$209.3 million and up to \$314.2 million.

In addition to the City of Cleveland, the utilization of the TIF program will generate local, multi-jurisdictional support of the balance of property tax rebate for Amazon ranging from \$448.0 million to \$672.5 million over a 30-year term. The other local jurisdictions supporting the TIF include but are not limited to: Cuyahoga County (see details below), the Port of Cleveland, Cleveland Public Library, Cleveland Metroparks and Cuyahoga Community College.

**Cuyahoga County Incentives: \$530.8 million – \$646.4 million**

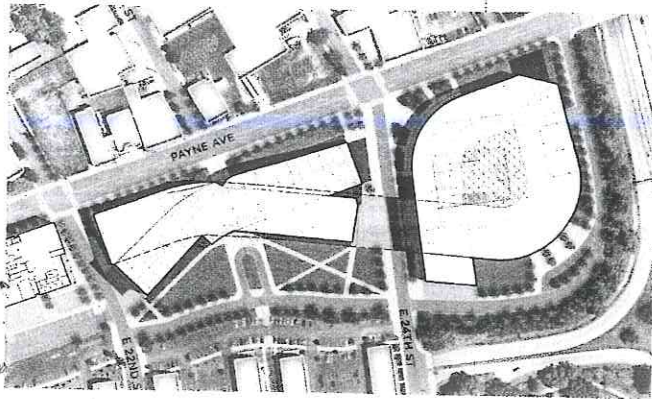
Cuyahoga County will offer Amazon an incentive package with an estimated total base value of up to \$646,437,840. The incentive is performance-based and could increase in value as Amazon's investment in Cleveland exceeds initial estimates. Cuyahoga County will also provide an additional investment of \$200 million for supporting infrastructure assets for the HQ2 operations.

**Direct Incentive:**

**100% of Sales Tax Increment for 20 years – \$300 million**

Cuyahoga County will provide a monetary incentive based on 100% of the additional Cuyahoga County sales tax revenue expected to be received over a 20-year period due to the project. The incremental revenue is estimated at \$300 million, based on Amazon adding the

**10** acres  
designated  
for Amazon  
University



**10** minute  
walk to  
Amazon  
HQ2

WHY  
CAREERS  
TO AMAZON?

We are a city, region and state proven to come together to offer companies such as Amazon substantial opportunities to reduce their capital and operational costs, drive efficiencies and economies of scale, and grow profitably.

number of jobs projected at its new headquarters over 10 years with standard economic modeling of multiplier effects. This additional sales tax revenue will be provided to the company to build/renovate headquarter sites or for other incentives of its choice, to include:

**Capital/Real Estate Expense:** Costs to build and/or renovate headquarters buildings.

**Relocation/Housing Offsets:** One-time payments to new headquarters-employees moving to Greater Cleveland to cover their moving and temporary-housing costs.

**Transportation/Infrastructure and Mobility:** Payments for free, dedicated circulating trolley service among the downtown buildings, with water-taxi service added as the site expands across the Cuyahoga River. Could include other street improvements, public transit investments or parking.

**Air Connectivity Incentive:** Subsidy for headquarters-employee airfare from Seattle to/from Cleveland until the number of new trips induces major airlines to add nonstop flights.

**Sustainability:** Payment for sustainability initiatives linked to the company's headquarters.

**Direct Incentive:**  
**Tax Increment Financing Program –**  
**\$230.8 million – \$346.4 million**

**Property Tax Rebate:** As outlined herein, the City of Cleveland will utilize its municipal authority to establish a Tax Increment Financing (TIF) program.

Based on the estimated building requirements provided, the County estimates the value of its direct incentive to be a minimum \$230.8 million up to \$346.4 million.

**Additional Investment:**  
**Downtown Cleveland Microgrid – \$200 million**

Cuyahoga County will build a highly resilient and reliable microgrid covering the entire Cleveland central business district where Amazon facilities will be located. The microgrid will provide reliable and

continuous electrical power and internet service. Cuyahoga County's cost to finance the microgrid, through bonding of future sales tax receipts beginning in 2028, is estimated at \$200 million.

**Other Local Jurisdictions Incentives:**  
**\$217.2 million – \$326.1 million**

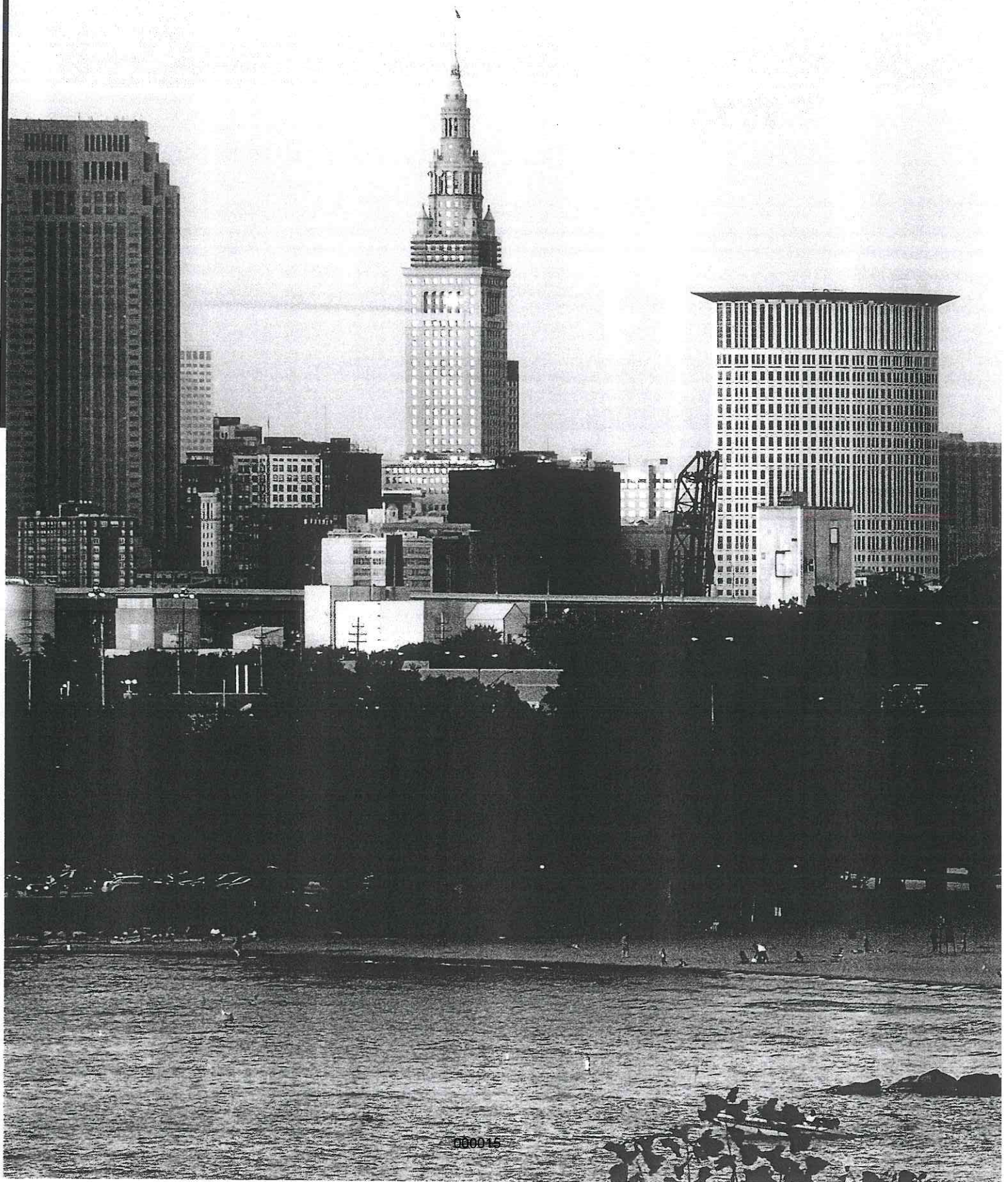
Based on building requirements described herein, the value of the balance of TIF program incentives generated from other local government jurisdictions in Cleveland and Cuyahoga County is estimated to range from \$217.2 million to \$326.1 million over the 30-year term.

**Direct Investment:**  
**Cleveland State University – Land Commitment**

Cleveland State will provide 10 acres of land on its campus for the construction of Amazon University. The Amazon University site is a 10-minute walk from Amazon HQ2 with accessibility to bus, bus rapid transit and trolley services. Amazon University will be served by Mayor Frank G. Jackson's Higher Education Compact. The Higher Education Compact is unique to Cleveland and will vastly multiply the educational resources that any single university can provide.

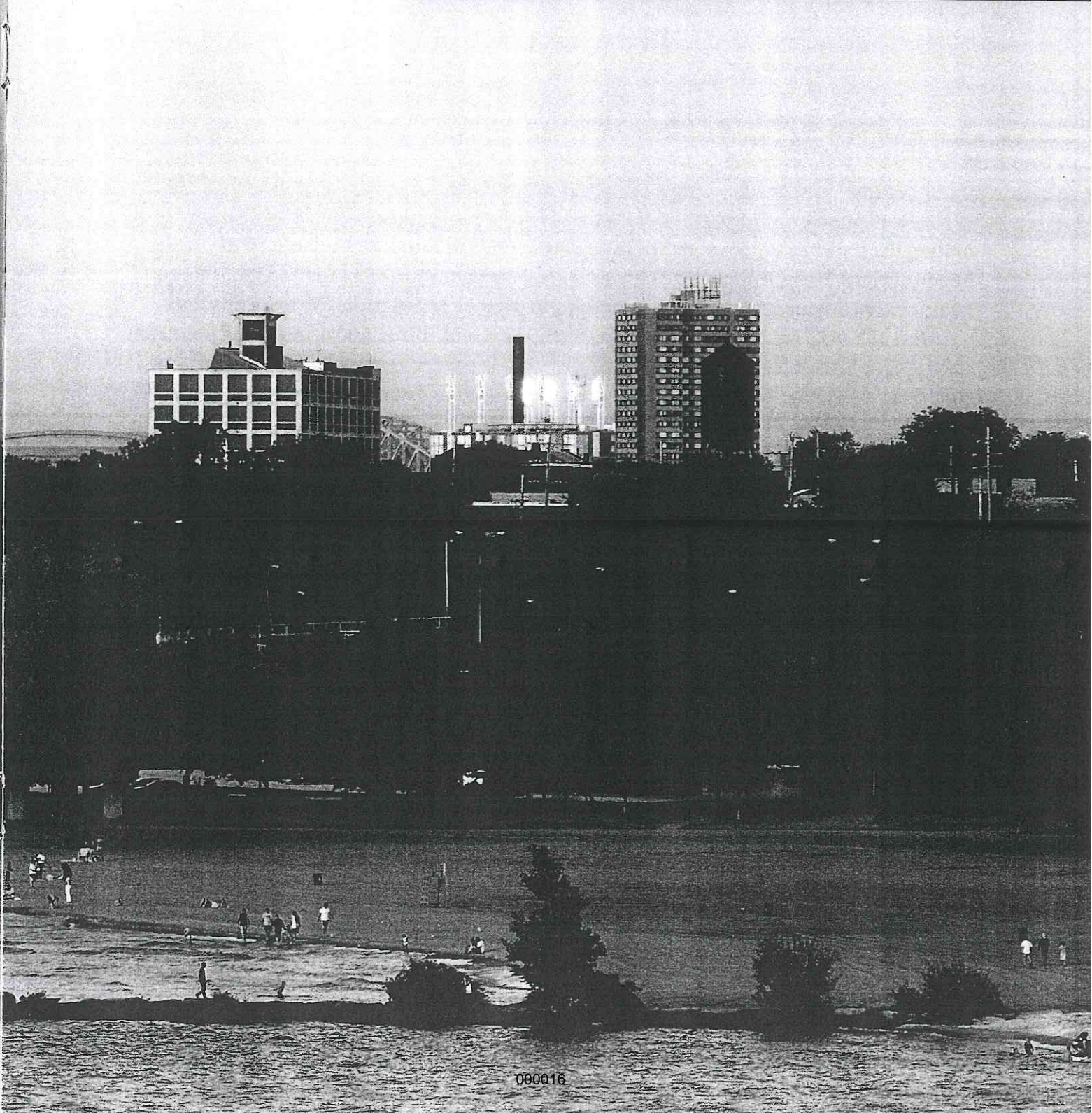
**Public, Private and Philanthropic Partnerships**

Amazon will also benefit from the strength and longevity of Cleveland's public-private partnerships. For decades, these partnerships have been the genesis that delivered the transformational assets and investments that have accelerated Cleveland's global renaissance. Cleveland's philanthropic community invests millions of dollars annually in capital, education and workforce initiatives. The Greater Cleveland Partnership (GCP), our business chamber of commerce and economic development organization, provides advocacy leadership and private-sector financing for key critical initiatives throughout the community. Together, these organizations and other community partners will continue to invest in complementary real estate development projects and other initiatives that will support Amazon's HQ2. □



# LAKE ERIE'S BEACHES

In downtown Cleveland and along Ohio's north coast, 70 public beaches are a spectacular way to experience Lake Erie, the 11<sup>th</sup>-largest lake in the world.





# A WORKFORCE THAT WORKS FOR AMAZON

Cleveland is the fourth-largest headquarters and professional services cluster among the nation's top 20 metropolitan areas and is home to 22 Fortune 1000 headquarters. Here, Amazon will find the ideal combination of a talented labor force, competitive business costs and a growing and diverse population. We are a city and a region of hard workers and big thinkers who have unlimited and unmatched potential.



- Easiest commutes of any metro area
- Salary of \$100,000 generates more spending power in Cleveland than nearly every other metro area over 1 million people
- Seventh in nation for 25- to 44-year-old workforce with advanced degrees

# W

ith more than 2 million workers within a 45-minute drive of downtown, Cleveland leverages its proximity to other major metro areas (Akron, Canton, Youngstown) through its unique ability to attract labor from a broader than normal geography. Each day, Cleveland draws more than 200,000 workers from outside of Cuyahoga County, in part due to stress-free commuting. The average commute time in Cleveland is just 23.1 minutes, and our city ranks as one of the least congested in the nation, beating out cities such as Denver, Detroit, Nashville and Pittsburgh, as well as all of the major coastal cities. This access has contributed to headquarters and professional services growth of 18%, with more than 200,000 new workers, over the past 15 years.

## Attracting a Diverse, Educated Talent Pool

Fueling Cleveland's professional services economy is its ability to attract highly educated, diverse talent. Out of the top 40 metropolitan areas, our region ranks sixth for the percentage of immigrants holding advanced degrees, putting us ahead of Boston. Overall, we rank 11<sup>th</sup> in the percentage of our workforce with advanced degrees. Our young adult workforce is particularly highly educated: 19.9% have an advanced degree, ranking us seventh in the country.

The trajectory of Cleveland's highly educated workforce is also on the rise: From 2000 to 2016, the percentage of the labor pool with an advanced degree went from 10.5% to 17.5%. This ranked as the sixth-largest percentage-point increase in the concentration of skilled workers in the top 40 metropolitan areas since 2000.

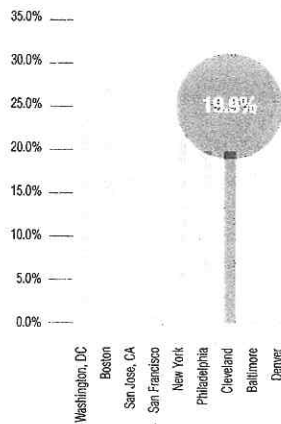


**6<sup>TH</sup>** highest growth  
in skilled workers

**Largest Percentage Point Gain in Workers with Advanced Degree, Top 40 Metros**

Source: CPS, 2000, 2016

	2016	2000	CHANGE
San Jose, CA	26.0%	16.1%	9.9%
Seattle	19.0%	10.8%	8.1%
Jacksonville, FL	14.7%	7.2%	7.6%
Boston	26.9%	19.5%	7.4%
Washington, DC	29.1%	21.8%	7.3%
<b>Cleveland</b>	<b>17.5%</b>	<b>10.5%</b>	<b>7.0%</b>
Charlotte	12.9%	6.0%	6.9%
St. Louis	16.5%	9.9%	6.6%
Atlanta	17.0%	10.4%	6.6%
Minneapolis	17.0%	10.6%	6.5%



**Percentage of Labor Pool Aged 25 to 44 with Advanced Degree**

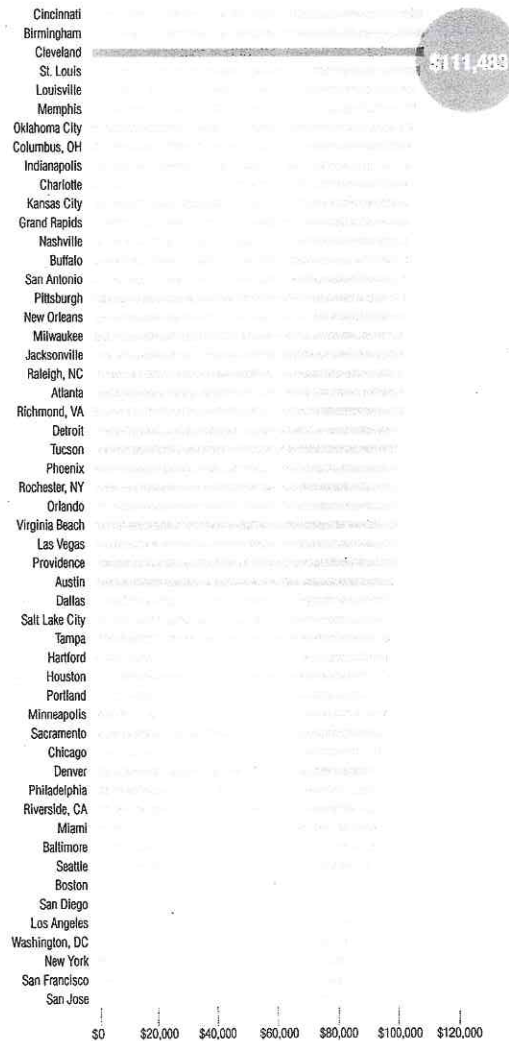
Source: Current Population Survey, 2016

## Labor Force and Wages



### What's \$100,000 Worth in Largest U.S. Metros?

Source: Regional Price Parity, BEA 2016



Cities that are affordable will increasingly be a draw. The average projected salary of \$100,000 for Amazon's second headquarters will go further in the Cleveland metropolitan area than nearly every metropolitan area over 1 million people.

### Benefitting From an Attractive Wage Cost Structure

The ability to attract talent is not the only compelling workforce-related draw for Cleveland. Labor costs in the region are also significantly lower than most other major metropolitan markets. Of the top 40 metropolitan markets in the country, Cleveland's average salary of \$62,700 is nearly \$12,000 less than the group's average (\$75,200), with salaries specifically in headquarters operations 11% less on average.

Cleveland's lower-than-average cost structure means everyone's dollars are more valuable here than in most other major markets. The average projected salary of \$100,000 for Amazon's second headquarters will go further in the Cleveland metropolitan area than in nearly every metropolitan area over 1 million people. When considering regional cost differences, a \$100,000 salary in Cleveland stretches to \$111,483, compared with approximately \$80,600 in San Jose, \$82,000 in New York and \$91,400 in Seattle. In all, Amazon's wage structure will translate to a greater spending power for employees, and with that a greater quality of life. This greater quality of life, in turn, continues to fuel the talent flows into Cleveland.

### Building the Talent Pipeline

Given the size of Amazon's expansion, no market in the country will be able to sufficiently serve all of Amazon's needs on Day 1. This makes a robust pipeline of emerging and future talent an essential component in the firm's value proposition.

To answer that need, Cleveland has an extensive higher education pipeline, with over 300,000 students enrolled in regional colleges and universities per year, and nearly 30,000 bachelor's or higher degrees and 13,000 associate's degrees awarded. Looking out to within 200 miles of Cleveland, those numbers swell: Colleges within this radius conferred almost 70,000 graduate degrees,



## PATHWAY TO AMAZON

Cleveland's talented labor force, competitive business costs, and a growing, educated and diverse population are a unique combination of assets that can drive business success from Day 1 and for the long term.

154,000 bachelor degrees and 73,000 associate degrees. (Interestingly, a quick scan of LinkedIn suggests that nearly 3,600 current Amazon employees received their education within this radius of Cleveland.)

In fields especially relevant to Amazon (IT, Business Management, Engineering and Legal), there are approximately 12,000 total graduates annually in Northeast Ohio.

Additionally, more than 11,000 international students are enrolled in undergraduate and graduate programs in Northeast Ohio. This is 5.7% of total student enrollment, compared to just 4.8% nationally, a testament to the region's commitment to a global and diverse talent pool.

Amazon is an "employer of choice" nationally and certainly will be in Cleveland. In support of that recognition, JobsOhio Talent Acquisition Services (TAS) is offering flexible funds totaling \$50 million that may be applied to the following types of talent pipeline programs: establishment of national recruiting hubs, travel vouchers for national candidates, expansion of Ohio recruitment staff, increase in recruiting advertising, execution of statewide, Amazon-specific career events, development of the Amazon Career Connector App, and other recruiting and workforce development programs.

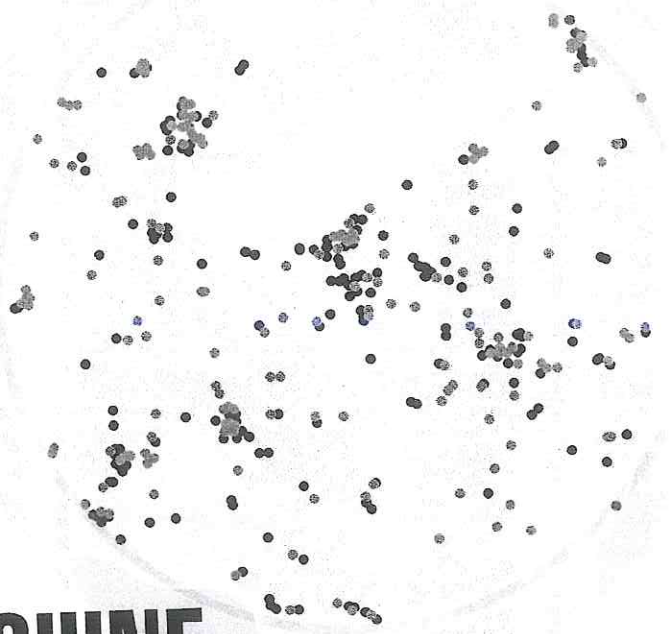
Funds will also extend to proactive and creative efforts to tap our area's rich educational resources to help "grow" a future Amazon workforce. This will include a strong focus on academic programs in areas vital to Amazon, such as expanding Early College High Schools focused on STEM curriculum and creating Amazon University, as highlighted in the section on Higher Education and Partnerships. In addition,

we propose to develop a program called Pathway to Amazon that will build an educational pipeline starting in select schools in the Cleveland Metropolitan School District. Beginning in eighth grade, students will be able to apply for acceptance into the program. Students will take intensive math and science courses with the opportunity to pursue dual enrollment and early college in the 10<sup>th</sup> grade. During school breaks and summers, Pathway to Amazon students will have opportunities to visit a variety of technology firms in our area.

### Cleveland Rising

Cleveland is experiencing a renaissance unlike many other markets in the country, yet still has the capacity to absorb the day-to-day needs of an opportunity of this scale. This revitalization is being driven primarily by young adults who live, work, learn and play downtown and in our neighborhoods. The share of residents in the city aged 18 to 34 increased by 4.3 percentage points from 2007 to 2015, which is 13<sup>th</sup> out of the core municipalities in the top 40 metropolitan areas. This revitalization is tied to significant resettling in Cleveland's urban core. From 1970 to 2015, the number of housing units within a two-mile radius of Cleveland's downtown increased by 38%. This not only shows that the heart of Cleveland is growing, but that there is room in Cleveland to grow. This is no small asset in a nation in which so many municipalities with world-class amenities are already built out. □

# A WELL-TUNED GRADUATE AND WORKFORCE MACHINE



In recent years, Cleveland has increasingly become a destination for well-educated workers. Headquarters, health care, education and IT jobs have all grown, and so have the number of workers with advanced degrees. Fortunately, the region has a strong higher education sector with leading institutions that help produce the educated workforce we need.

**N**ortheast Ohio has 25 major colleges and universities, from large research universities to small liberal arts colleges, and Cleveland hosts three that demonstrate the range of options for students – and employers.

## A Wide Range of Options

Case Western Reserve University (CWRU) is a top-ranked private research university, with graduate programs that include engineering, law and management. Research revenues last year were about \$380 million, with almost 1,500 projects funded by the NIH, NSF, NASA and others, producing 280 inventions with over 270 industry partners. CWRU recently created a 50,000-square-foot innovation center called “think[box]” that offers the space, guidance and technology – including 3-D printers and laser-cutters – needed to transform ideas into products. It is the nation’s single largest university-based innovation and entrepreneurship center and benefits a university whose management school was a pioneer in both *Managing by Designing* and *Business as an Agent of World Benefit*.

Cleveland State University (CSU) has grown remarkably as a research enterprise in recent years. According to the 2015 Chronicle of Higher Education Almanac, CSU led all U.S. universities in increased research spending in science and engineering between 2004 and 2013. CSU was first in the nation in research funding growth, first in federal research funding growth, and 12<sup>th</sup> in corporate research funding growth. CSU’s 17,000 students are attracted to its “Engaged Learning” mission, which thrives on over 250 partnerships that include the Cleveland Clinic, NASA Glenn Research Center, Sherwin-Williams, Rockwell Automation and many of the region’s major employers and community organizations.

Cuyahoga Community College (Tri-C) is the largest public community college in Ohio and confers more associate degrees than any other in the state. It also creates customized training programs for employers and offers more than 600 workforce and professional development courses each year in fields such as IT, project management, finance, accounting and leadership. TrainingIndustry.com has selected Tri-C as a Top Training Company in Workforce Development each of the last five years. Tri-C has a wide suite of fast-track tech programs and certifications through its IT Center of Excellence and offers certification through classes in data analytics or software development and programs like its Cisco Technical Training Institute.

- Northeast Ohio has 25 major colleges and universities
- 300,000 students are enrolled in Northeast Ohio colleges and universities
- Nearly 30,000 bachelor’s-plus degrees and 13,000 associate degrees awarded
- 30% of degrees granted were in business, engineering, law and computer-related fields

**25** major colleges and universities located in Northeast Ohio

**414** within a 200-mile radius

### Education Partners in the Higher Education Compact of Greater Cleveland

Baldwin Wallace University	Eastern Michigan University	Ohio Board of Regents
Bowling Green State University	Hiram College	Ohio University
Case Western Reserve University	John Carroll University	The Ohio State University
Cleveland Metropolitan School District	Kent State University	The University of Akron
Cleveland State University	Notre Dame College	The University of Toledo
Cuyahoga Community College	Oberlin College	Ursuline College

Our educational institutions also collaborate frequently. For example, CSU and CWRU have an extensive research partnership on the Internet of Things that is providing the foundation for new degree and certificate programs. And CSU and Tri-C have partnerships in Information Systems, Electronic Technology, Accounting and Supply Chain Management, among others.

Other large universities in our region include Kent State University and the University of Akron, whose signature programs include fashion design and polymer science, respectively, and The Ohio State University is just a two-hour drive from Cleveland. The Cleveland Institute of Art in University Circle produces graduates highly sought after as studio artists, industrial designers and photographers.

#### Regional Educational Collaboration

The region has a unique vehicle, the Higher Education Compact, to promote collaboration among 16 public and private universities. Established by Cleveland Mayor Jackson in 2011, the Compact's goal is to increase the number of youth from the region attending and graduating from college. No other metropolitan area has an organization with this scale, scope, mission and range of partnerships.

Other collaborations are working to nurture a passion for science and technology in earlier grades. Acting on the recognition that computer science should be a foundational skill for all high school students, Microsoft, CSU and the Cleveland Metropolitan School District have built partnerships to ensure that every high school in the district has a rigorous computer science course sequence.

The city's business, philanthropic, education and government leaders are implementing a major plan to transform urban education and build a talent pipeline for the future. A new public-private fund of \$23 million is focused on our earliest learners, doubling the number of high-quality pre-K opportunities available. Additionally, a joint effort is underway to bring the Say Yes to Education initiative to the city's schools. Our Say Yes partnership will make us the program's fourth city and provide our students with the academic and social support services necessary to graduate prepared for postsecondary education. □

**Amazon will need a regular flow of workers with skills in management, engineering, software development, legal and accounting, and also resources to provide continuous training. Northeast Ohio has strong higher education resources to provide that skill-building at varying levels of complexity and a history and culture of working with corporate partners.**

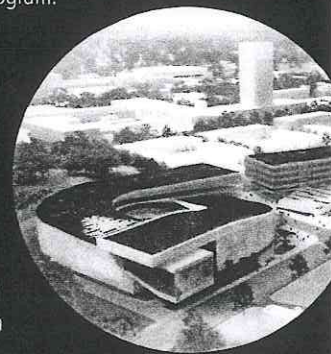
## Uniquely Cleveland

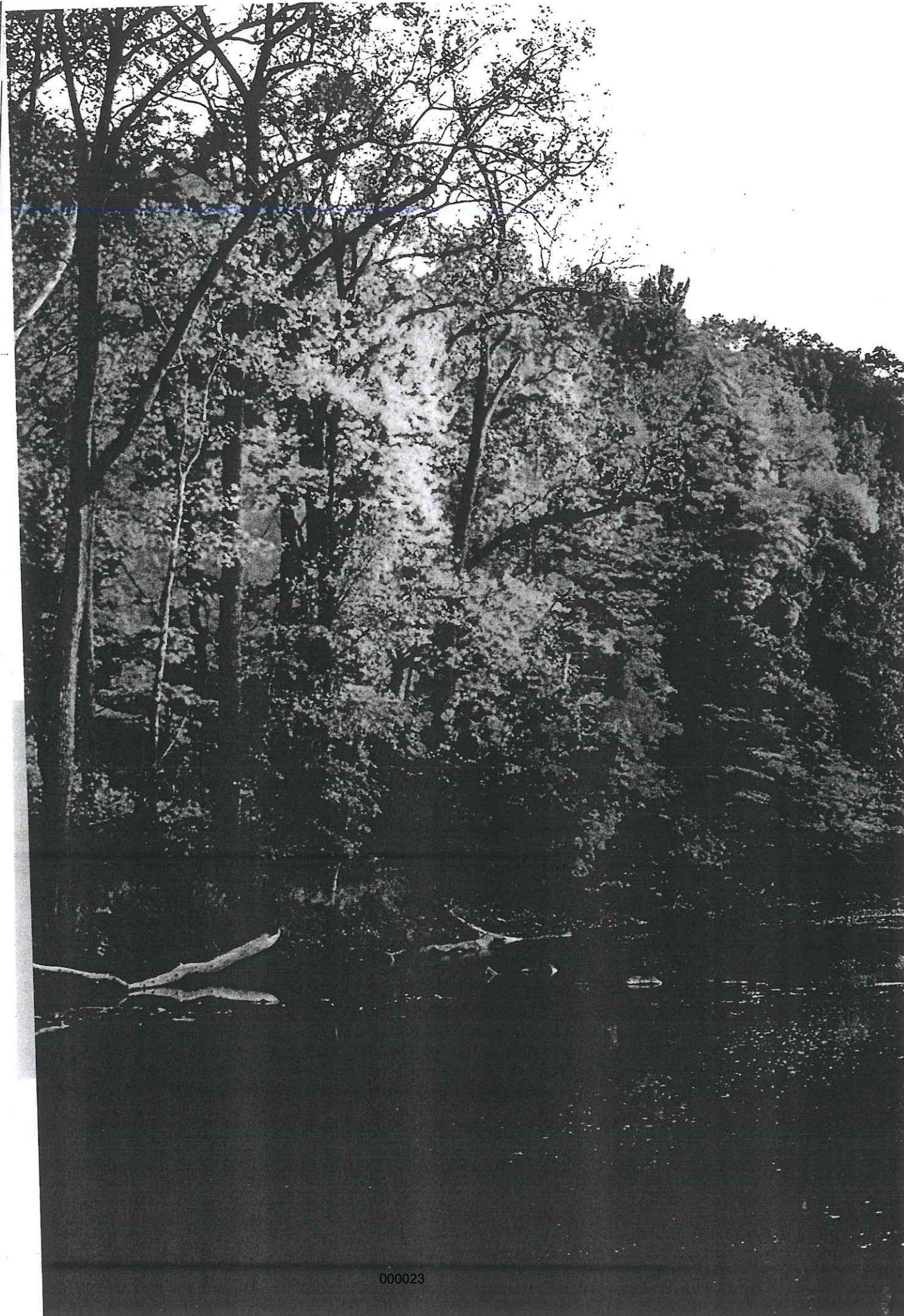
### Creating Amazon University

Spread over 10 acres adjacent to Cleveland State University's downtown campus and blocks away from HQ2, Amazon University (AU) would bring together the capabilities of the 16 colleges and universities that are partners in Cleveland's Higher Education Compact to develop a completely tailored training and development program. AU would be based in an educational park featuring a 100,000-square-foot, five-story, eco-efficient facility, a meeting and event center with a capacity of up to 6,000, and a K-12 school with a globally accredited International Baccalaureate program.

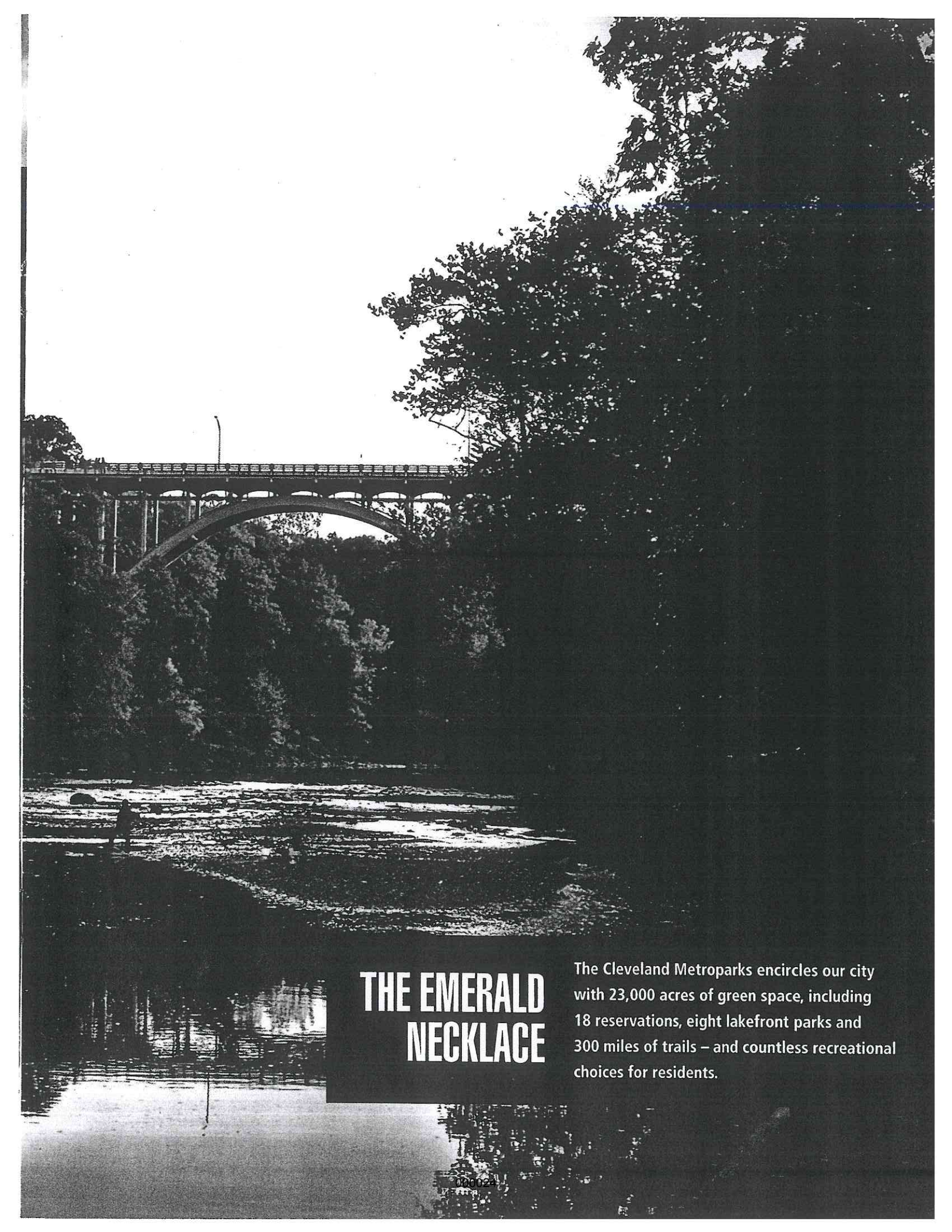
The participating institutions will work with Amazon human resources leadership to create an educational program that builds and reinforces both desired skills and culture. In addition, the schools would partner with Amazon to create an "Amazon track" within each identified discipline. Students in these tracks would take a series of courses co-created by Amazon and faculty fellows and be connected to various career development opportunities at Amazon.

Amazon University would give Amazon a powerful tool for building and developing its future workforce, both in Cleveland and around the world.





000023



## THE EMERALD NECKLACE

The Cleveland Metroparks encircles our city with 23,000 acres of green space, including 18 reservations, eight lakefront parks and 300 miles of trails – and countless recreational choices for residents.



# TAKE THE EASY WAY HOME TO, FROM AND AROUND CLEVELAND

Cleveland is strategically located to maximize access to more than half of the U.S. Fortune 500 headquarters in the United States and 43% of the nation's population. Fed by an ample supply of interstate highways, our region hosts a wide variety of transportation assets, including public transit, commercial rail, international and commuter airports, and a growing port that is a leader among its Great Lakes peers.

**A** headquarters located in Cleveland is well positioned to serve significant portions of the nation. Cleveland is within a day's drive and an hour's flight to nearly half of the country's population and a third of Canada's.

## Air Travel

Cleveland is home to two full-service airports – Cleveland Hopkins International Airport and Burke Lakefront Airport. Additionally, Cuyahoga County Airport is less than 16 miles away from downtown, and the Akron-Canton Regional Airport is less than one hour and just 50 miles south of downtown Cleveland.

Downtown Cleveland is connected by 11 miles of interstate to Cleveland Hopkins. Total travel time to Cleveland Hopkins from the central business district is less than 20 minutes by car and less than 30 minutes via public transit. Burke Lakefront is located immediately adjacent to the central business district and is accessible in less than five minutes by car, or 15 minutes by transit or walking. Together, the four airports serve over 50 North American markets and international destinations, including New York City, Washington D.C., San Francisco, Seattle, Toronto and Reykjavik, Iceland. Cleveland Hopkins is currently in direct communications with two additional international providers.

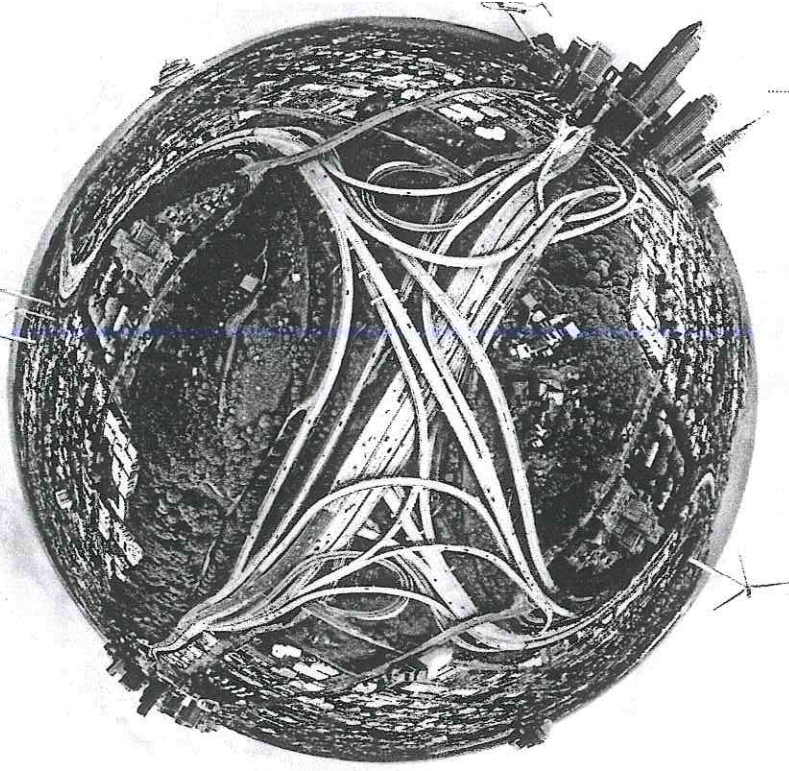
## Public Transportation

Public transit is an important aspect of any transportation network, and Cleveland's public transit system is the largest in Ohio and one of the largest in the United States, serving more than 200,000 weekday customers and nearly 50 million annually. It features bus, commuter bus, bus rapid transit, light and heavy rail, paratransit, trolley and a water taxi. Our region boasts the nation's fourth-largest bus-rapid-transit system, which has received international acclaim and helped revitalize a key thoroughfare linking downtown to our world-class health care and cultural amenities.

Cleveland transportation plans include a future rail network expansion that will triple capacity. The plan will expand the current 37 miles of commuter rail to 111 miles, and stations will increase from 50 to 162. As Amazon's HQ2 home, Cleveland will accelerate the expansion to achieve build-out by 2029 in tandem with the development timetable. We are working to make one of the best systems in the country even better.

Initial build-out of Amazon HQ2 will be located in the center of downtown at the historic Post Office Plaza and Terminal Tower facilities. This location provides unmatched access to public transportation, as Cleveland's main public transit hub is located within the complex. The hub

- Downtown access to three major interstates, two airports, three transit rail lines, two BRT lines, 50 bus routes and Amtrak
- 56% of Fortune 500 U.S. headquarters within an eight-hour drive
- 1.3 million residents can access public transportation in less than 10 minutes
- Seventh-fastest growth among U.S. cities for bike commuting
- Downtown walkability score of 91



## WELCOME TO AMAZON:

Cleveland's transportation infrastructure will provide a high quality of life for Amazon and its employees and convenient access to national and international business destinations.

provides direct rail access to Cleveland Hopkins and Burke Lakefront, Cleveland neighborhoods and surrounding suburban communities. In this location, employees will be able to directly access all modes of public transit, as the vast majority of routes begin and end there.

### Passenger Vehicles and Private Vehicle Services

Our region enjoys a robust transportation system, anchored by nearly 11,000 miles of interstate highways, arterial and local roads. The roadway system was initially designed for a much larger centralized population, with the ability to easily absorb an additional million people region-wide. The primary interstates in our region are I-90, which is the longest interstate in the United States, I-77, I-71 and I-80, which is the only toll road in the region. Interstates that circumnavigate portions of our community include I-271, I-277, I-480 and I-490.

Amazon employees and visitors will enjoy some of the most convenient commutes of any major metropolitan area in the country. In Cleveland, the average commute is 23.1 minutes, largely due to morning and evening congested peak periods that last only 1.5 hours, and the average daily delay per capita due to traffic congestion is less than four minutes. Thus, Cleveland is one of the least congested cities in the nation.

### Biking and Walking

Active transportation is another key piece of Cleveland's transportation system. With more than 860 miles of trails and other bicycle facilities and an expansive sidewalk coverage, the city has tremendous options to use to get around town.

Cleveland's bicycle commute rate is more than double the state average and has increased 238% since 2000. We have integrated bicycling with transit via a Rack-N-Roll program begun in the 1990s, which allows bicyclists to use a bike rack on the front bumper of every bus, and we have expanded it to rail and BRT. Last year, we launched the UH Bikes Cleveland Bike Share program, which includes 250 bikes at 29 fixed stations and seven "drop zones." This new program is expanding easy access to bicycles for visitors and residents alike. Cleveland also offers a full-service bicycle parking and commuting center. Referred to as The Bike Rack, it provides riders with services such as secure bike parking, lockers, showers, a repair shop and rentals all within a five-minute walk of the city's entertainment and sports venues.

Downtown Cleveland is also extremely walkable. The city's walk score of 91 is the highest designation by Walk Score and illustrates the ease with which people can navigate downtown. Additionally, Cleveland's bordering neighborhoods received high walk scores, allowing residents to easily commute to and from the city center. □ 000026

## TRANSPORTATION BY THE NUMBERS



**\$15.8**

billion devoted to transportation improvements over the next 20 years



**50+**

markets and 7 international destinations served by 4 national airports



**773**

miles of on-road bicycle lanes and 453 miles of off-road trails



**4<sup>TH</sup>**

largest bus-rapid-transit system

**238%**

increase in bicycle commuting rate since 2000

# INVENTED HERE, MADE HERE, SOLD EVERYWHERE

With a strong innovation and entrepreneurial ecosystem, Cleveland has emerged as one of the 50 most entrepreneurial-friendly cities in the entire world.

## UNIQUE CLEVELAND...

- First city in the U.S. to directly connect downtown and airport by rail transit
- First region to create a consortium of philanthropic organizations (60+) dedicated to economic development
- First community foundation in the country – The Cleveland Foundation
- First Great Lakes seaport to provide containerized shipping direct to/from Europe
- Home to the Cleveland Clinic, which pioneered dialysis, coronary artery bypass surgery, and kidney and face transplants; first to identify carpal tunnel syndrome and discover a gene mutation associated with heart attacks
- 30%+ of entrepreneurial leaders of region's growing companies are women or people of color

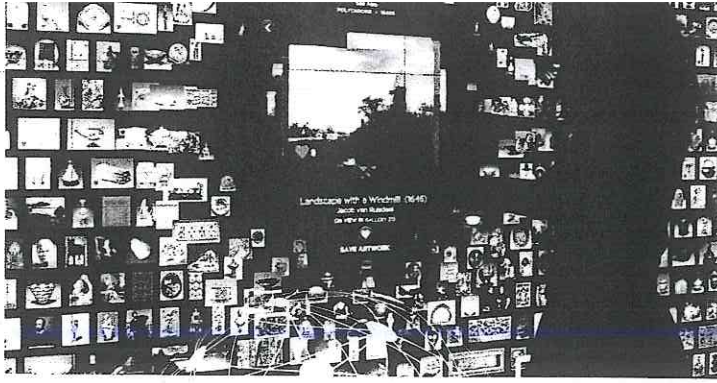
**I**nnovation in Cleveland is being nurtured through more than 50 maker spaces, accelerators, incubators and entrepreneurship programs – leveraging our many assets in the corporate, university and startup communities in information technology, IoT, advanced materials and electronics, health care and additive manufacturing.

Northeast Ohio's 22 Fortune 1000 headquarters all have local R&D centers and teams, and the region's five research universities, five-plus major medical research institutions, 15 liberal arts and community colleges, and NASA Glenn Research Center are connected and working together to accelerate tech transfer, technology commercialization and student entrepreneurship. As evidence, these organizations have received more than 20,000 patents in the last 17 years.

Entrepreneurship is thriving as well. Our startup companies have created more than 10,000 jobs since 2004 and raised more than \$2.2 billion in capital. They have grown to contribute more than \$4.5 billion in impact on the Ohio economy since 2010, according to Cleveland State University IMPLAN Economic Impact reports. Cleveland is home to JumpStart, a public-private partnership that provides venture capital and intensive, high-impact assistance to diverse entrepreneurs and small business owners. And we are soon to become home to Plug and Play, one of the nation's top technology accelerators, and the more than 30 early-stage companies it assists annually. Tech companies such as IBM Watson, Hyland Software and OnShift have been able to accelerate their growth and access to talent as a result of partnerships with local universities and support for co-boot camps such as TechElevator, Software Craftsman Guild and We Can Code IT. These programs are focused on providing programming and systems engineering skills training for women, youth, underemployed adults, and people of color.

Hundreds of events occur each year in which large company innovators, inventors, entrepreneur investors and others in the ecosystem are able to find like-minded individuals and community to inspire and energize. In addition, national recurring events such as Industry: The Product Conference, The Cleveland Clinic's Innovation Summit, Content Marketing World, and JumpStart Startup Scaleup event are further driving innovation, tech and entrepreneurship. □

# Uniquely Cleveland



## INNOVATING FOR OUR FUTURE

### **An Unparalleled Digital Agenda**

Cleveland is on the path to transforming into the most wired city in America. Thanks to public-private partnerships, Cleveland became home to the nation's first commercially available 100-gigabit fiber network, which covers a 1,600-acre area from downtown (including the proposed site for Amazon HQ2) to Case Western Reserve University, and includes the Cleveland Clinic and University Hospitals. Cleveland has also launched the Connect the Unconnected pilot program to connect low-income households by bringing them online, supporting digital literacy and providing job training.

### **An Investment Model for Ending Poverty**

Poverty is unacceptable, unnecessary and unsustainable. The goal of the UnifyProject is to shift from a charity to an investment model, and build an inclusive economy that empowers all to live in prosperity. The project focuses on using big data to drive efficiency in redefining health, optimize the use of resources, and reshape the medical and health care world to invest in and ensure sustainable, scalable solutions.

### **Partnership Aiming to Make Cleveland a Leader in the IoT Revolution**

Cleveland State University and Case Western Reserve University are partnering to expand research and educational opportunities in the Internet of Things (IoT). This public-private university partnership is helping to make Cleveland a leader in the IoT revolution, expanding the development of new innovations, increasing technology transfer and enhancing economic investment.

### **A Center for Health Innovation, Right in the Center of Cleveland**

The Global Center for Health Innovation is the only facility of its kind, a gateway to host and engage the finest medical and health care institutions and companies. The Global Center currently partners with 45 of the world's leading health care, health IT and medical innovation brands (including GE Healthcare, Siemens, Philips, Cisco Systems and Cardinal Health) in a 235,000-square-foot location, which is adjacent to the state-of-the-art Huntington Convention Center.

### **One of the First Undergraduate Programs Nationwide in Data Science**

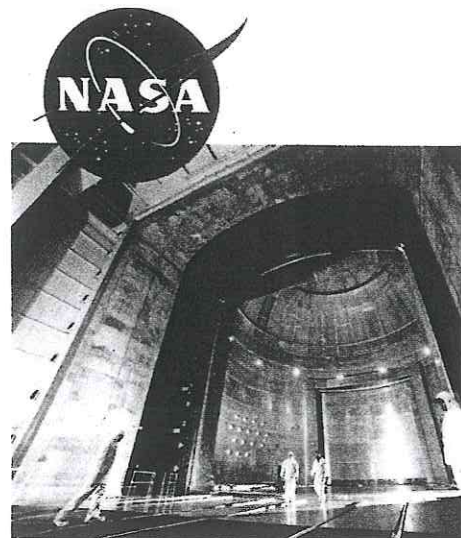
Case Western Reserve University offers a bachelor of science program in data science and analytics, which provides students with the instruction, skills and experience needed to understand and handle large amounts of data for conversion to actionable information. The degree program has a unique focus on real-world data and applications.

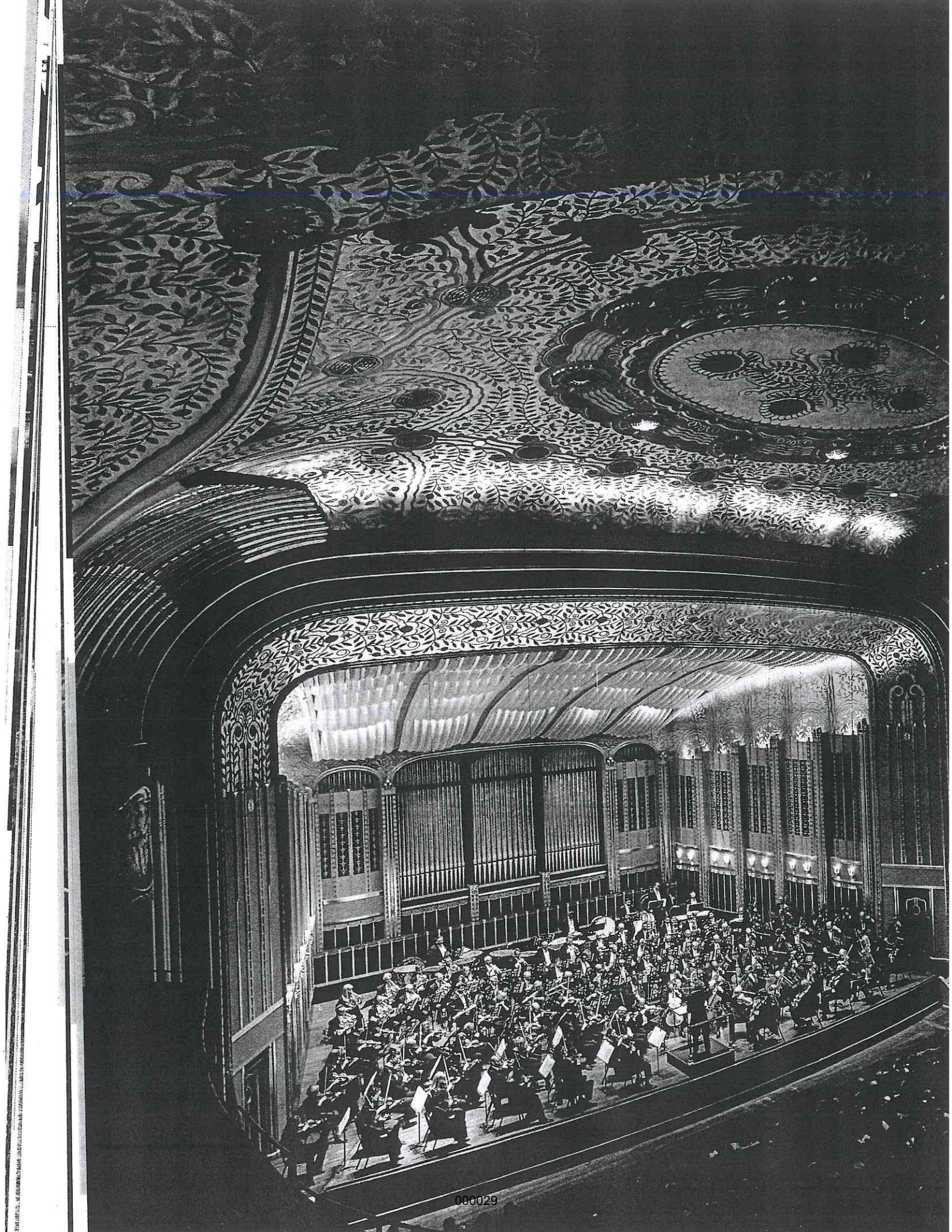
### **Innovations that are out of this World**

The NASA Glenn Research Center designs and develops innovative technology to advance NASA's missions in aeronautics and space exploration. NASA Glenn's highly skilled workforce is focused on researching and testing game-changing technology that will enable further exploration of the universe and revolutionize air travel.

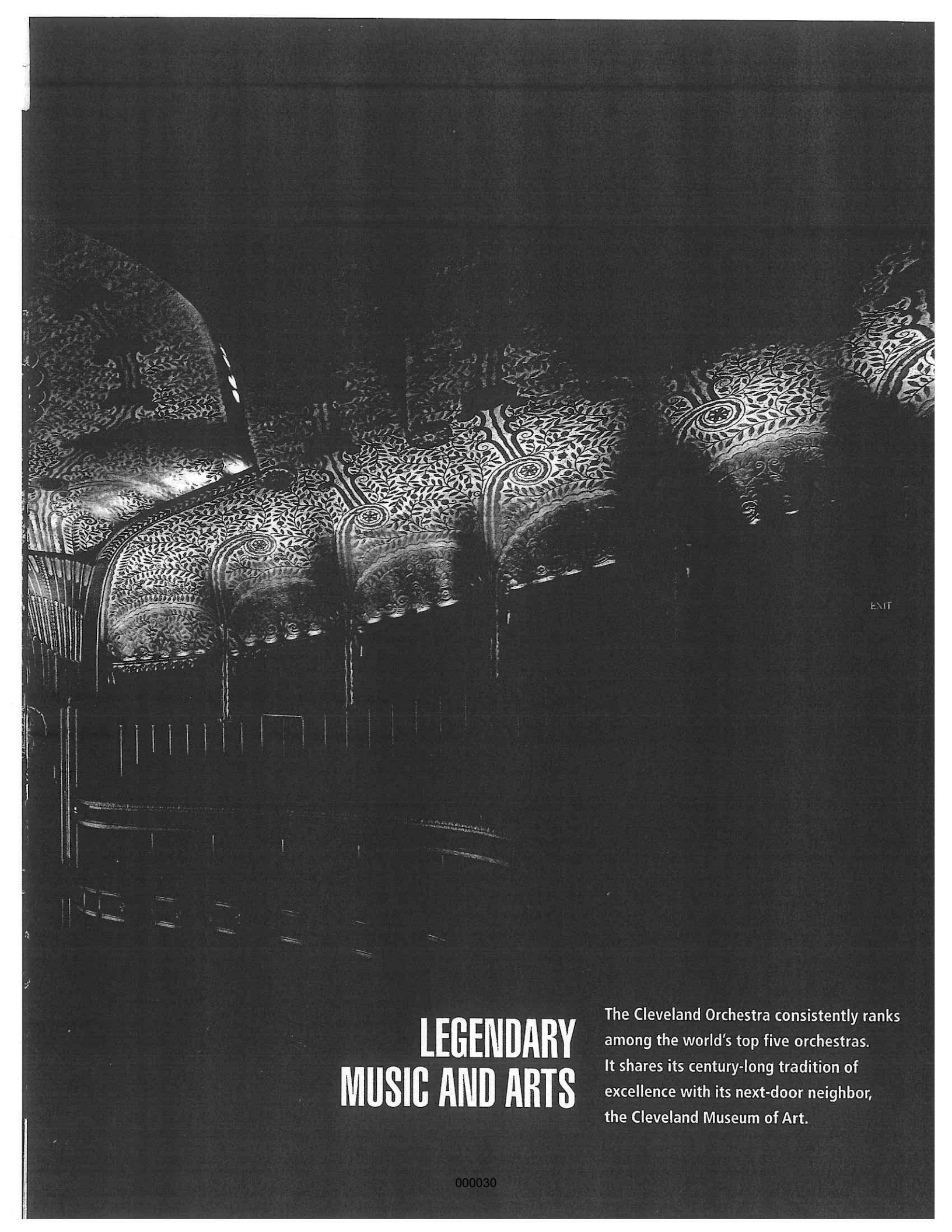
## WORKING PARTNERS TO AMAZON:

Entrepreneurship directly contributes to a company's financial gain and helps drive the local economy. Entrepreneurs are innovators, and a supportive climate can deliver a multiplier effect to the level of innovation.





000029



EXIT

# LEGENDARY MUSIC AND ARTS

The Cleveland Orchestra consistently ranks among the world's top five orchestras. It shares its century-long tradition of excellence with its next-door neighbor, the Cleveland Museum of Art.



# A CITY OF CHOICE AND CHOICES

## WHAT MAKES A CITY GREAT?

While some feel that a city's greatness is determined by the number of skyscrapers, the success of the sports teams or even the number of residents – the ultimate measure of a city's greatness should be the quality of life it offers. A great city offers choices, and connects its people to a wide variety of world-class options in housing, education, entertainment, recreation and culture.

### ONLY CLEVELAND...

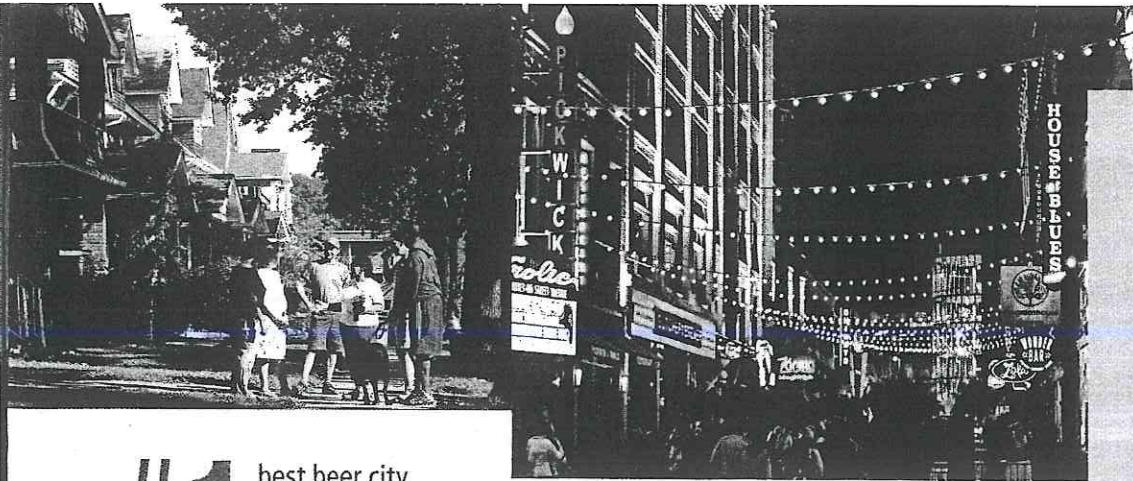
- Home to about 120 ethnic groups who speak more than 60 languages
- World-class arts and cultural institutions including Playhouse Square, Cleveland Orchestra and Cleveland Museum of Art
- Lake Erie, Cleveland Metroparks and Cuyahoga Valley National Park provide outdoor recreation options to suit all interests
- 3 major sports teams located within a 10-minute walk of the HQ2 site

**A** strong sense of place and community matters more than ever when it comes to talent attraction and retention. Regardless of your interests, age, nationality, race or sexual orientation, Cleveland offers a high quality of life and a unique sense of community. From a thriving downtown and distinctive center city neighborhoods, to a 33,000-acre national park and 26 acres of downtown waterfront recreation space, the amenity and lifestyle choices that Cleveland offers give employers a leg up in attracting and retaining talent.

### Love Where You Live

Amazon will find that Cleveland's downtown is much more than a central business district. It is a rapidly growing, amenity-rich neighborhood that continues to attract a young, talented workforce. Downtown Cleveland was rated a "Walker's Paradise" by Walk Score, and is home to 380 restaurants, bars, cafes, shops and entertainment venues, making it the ideal location for new residents to settle down, and former Clevelanders to come back home. Fueled by the preservation and redevelopment of historic properties, the downtown population grew from 6,480 residents to over 15,000 from 1990 to 2017. Over the last 15 years, the number of 25- to 34-year-olds increased by 80% and the number of four-year or advanced-degree holders increased by 141%.

Cleveland's welcoming, vibrant neighborhoods extend beyond downtown, attracting a diverse and skilled workforce. Neighborhoods like Ohio City, Tremont, Detroit-Shoreway and AsiaTown boast chef-driven and immigrant-inspired food scenes, all within a short bus, rapid transit or bicycle commute of downtown. University Circle, the fourth-largest employment cluster in Ohio, is home to the world-renowned Cleveland Museum of Art and Cleveland Orchestra and a walkable district of housing, restaurants, shops and cafes. Some of the nation's top health care facilities including the Cleveland Clinic and University Hospitals are also located in this neighborhood.



## WHY IT MATTERS TO AMAZON:

Cleveland's exceptionally high quality of life and sense of community will position Amazon to attract and retain the 50,000 people necessary for HQ2.

**#1** best beer city in the U.S.  
Source: *Candle Haste Traveler*



**#7** best food city in the U.S.  
Source: *TIME*



**150** parks, playgrounds and green spaces  
Source: *City of Cleveland*



### Buy a Nice Home, For Less

In Cleveland, your employees may have a better chance of purchasing their dream home than in almost any other major metro area in the nation. Median home prices are significantly lower here, with the vast majority (89%) priced at or under \$299,000. What's more, these affordable housing options are located in communities that feature some of the state's top-rated school districts. Five local communities – Solon, Rocky River, Beachwood, Broadview Heights and Bay Village – rank among the top 15 school districts in the state. A variety of outstanding educational opportunities, including top-tier public, private, charter, International Baccalaureate and religiously affiliated schools, allow families and students the ability to choose the best educational and cultural fit.

### Median Home Price



### Work Hard, Play Hard

Clevelanders work hard, but they also know how to have fun. From the Cuyahoga Valley National Park to Severance Hall, the home of the world-famous Cleveland Orchestra, the city has something for everyone.

Cleveland's Lake Erie access is ideal for sports such as kayaking, fishing, jet skiing, boating and swimming. The region's comprehensive network of parks and trails includes the 100-mile Towpath Trail and the 23,000 acres of the Cleveland Metroparks. In addition to bicycling and hiking, the Cuyahoga Valley National Park offers downhill skiing and winter activities. The Cuyahoga River hosts the region's collegiate and high school crew teams. And golf enthusiasts have a choice of 86 courses located within 20 miles of the city's center.

Our cultural and arts scene features institutions such as Playhouse Square, the second-largest performing arts center in the country; Cleveland Museum of Art, one of the top art museums in the nation; and the one and only Rock and Roll Hall of Fame and Museum, just to name a few.

Sports are also a large part of what makes our city special. Cleveland is home to NFL, NBA and MLB sports teams, two minor-league baseball teams, an arena football team, minor-league hockey team, and a D-league basketball team. The Pro Football Hall of Fame in Canton is less than a one-hour drive from downtown Cleveland.

### Welcome to Cleveland

Cleveland is a place where everyone can feel welcome. The city is home to 120 or so ethnic groups who speak more than 60 languages, making Cleveland a beautiful melting pot that represents the diversity of our country. The Global Cleveland center helps attract, welcome and connect international newcomers to economic and social opportunities in and around Cleveland.

African American heritage is woven into the fabric of the city. Perhaps best known is the election of Carl Stokes in 1968 as the first African American mayor of a major U.S. city, but contemporary initiatives abound to transform education and make economic, community and workforce development more inclusive.

Cleveland is also proud to actively support the LGBTQ community, best illustrated by the region's hosting of about 10,000 athletes from 60 countries for the 2014 Gay Games. Following Cologne, Germany, and preceding Paris, it was the most economically successful in the Games' 32-year history. The city also hosts an annual Pride event, which celebrated



# CLEVELAND TIEBREAKERS



## HEALTH CARE CAPITAL

Cleveland is a hub for health care innovation, leveraging the CWRU School of Medicine and three highly ranked academic medical centers, including the Cleveland Clinic. In addition to their own commercialization efforts, they are partners in BioEnterprise, which has helped attract over \$2 billion in investments in more than 350 bioscience and health IT startups. The one-of-a-kind Global Center for Health Innovation brings them and 45 of the world's leading health care, health IT and medical innovation brands together in a dedicated, 235,000-square-foot building.



## ATTACKING POVERTY

The UnifyProject is the most broad-reaching effort ever mounted to use big data, artificial intelligence and machine learning to end poverty. Founded by the creators of Cleveland-based IBM Watson Health's Explorys, the world's largest platform of health care data, the project brings together the brightest minds in medicine, education and philanthropy. It offers a dynamic opportunity to utilize Amazon expertise, technologies and cloud capacity, and to collaborate on the world's most ambitious urban renewal effort.

## THIS MOMENT IN TIME

\$33 billion in capital investments since 2009, led by manufacturing, health care and biotech, higher education, entertainment and culture, transportation and infrastructure. A revitalized downtown, where a growing number of people are living and working amid new hotels, apartments, restaurants, parks and trails, all along the waterfront. With all that development, we've been saving the best location for the right opportunity. Amazon is it.



## DIGITAL BACKBONE

With its strategic location between New York and Chicago, the Cleveland market is one of the highest trafficked internet points of presence in the world. Just blocks away from your new headquarters are all major carrier points of presence, including AT&T, Spectrum, Centurylink, Everstream, Windstream, Lighttower, internet2 and more. Regional carriers have an abundance of dark fiber assets that also set our market apart, including high availability of 100-gigabit services and direct connections to Amazon's web services cloud.



## SUSTAINABLE LIFESTYLE

Amazon HQ2 will be in a spectacular downtown location. Your offices would be at the city's center, on the newly renovated Public Square, with five acres of park space out your front door. Your people would be a half-mile by foot, bicycle or train to the Cuyahoga River in one direction or Lake Erie in another, with access to watersports, apartments, restaurants, clubs, museums and more. Rather fly? Another half mile gets you to Burke Lakefront Airport.



## FAILPROOF MICROGRID

If the power (electric, heat, cooling, internet) goes down elsewhere in the country due to a natural disaster, cyber strike, or physical attack, Amazon will still be fully operating in Cleveland, thanks to the nation's only district-wide microgrid, supplemented by a secure facility 2,000 feet underground.

# AMAZON YOUR



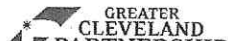
# Cleveland

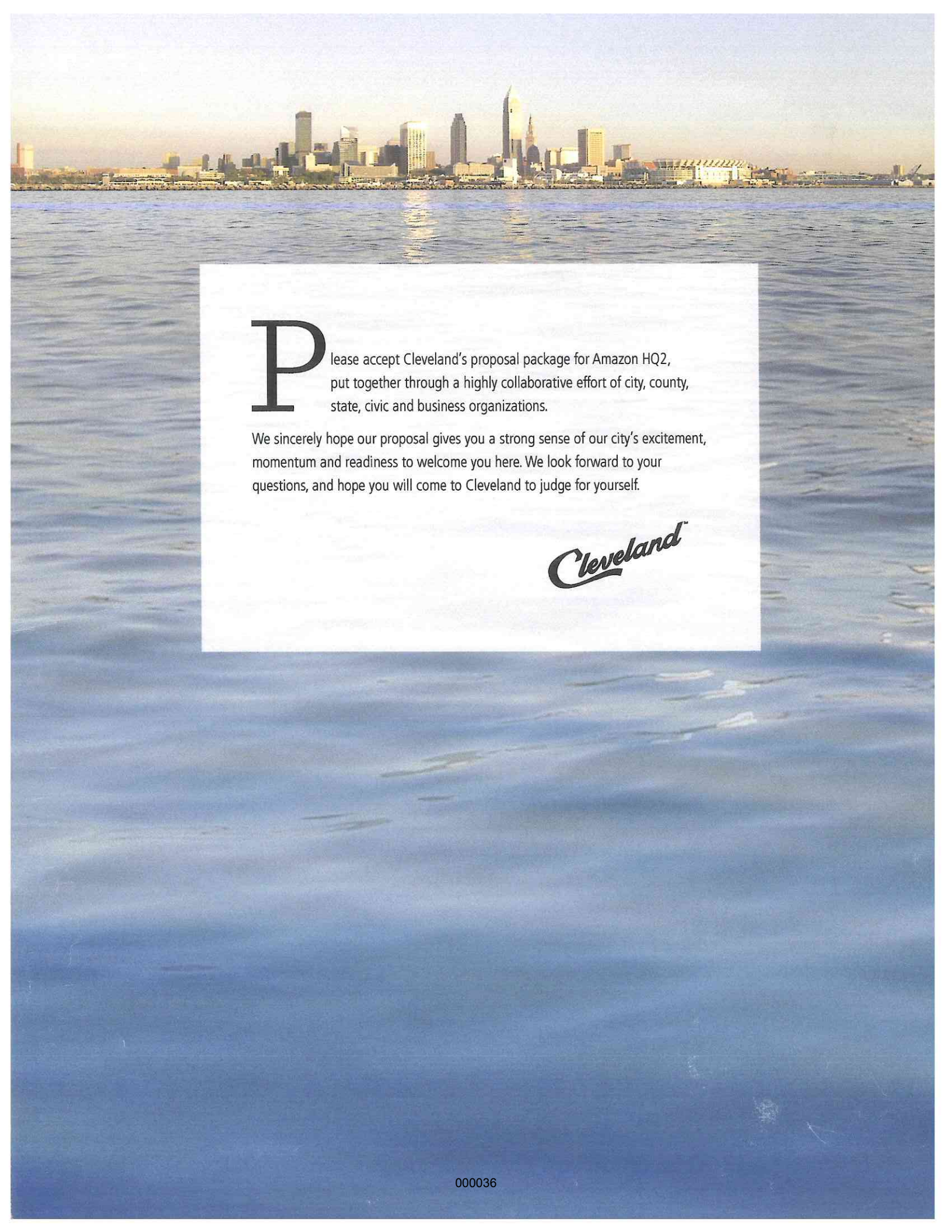
**Debra Janik**  
Senior Vice President, Real Estate & Business Development  
Greater Cleveland Partnership  
DJanik@gcpartnership.com | 216.592.2268

**Mary Cierebiej**  
Senior Director, Site Selection  
Team Northeast Ohio  
MCierebiej@teamneo.org | 216.363.5411

**BUSINESS TRADE SECRET  
CONFIDENTIAL**

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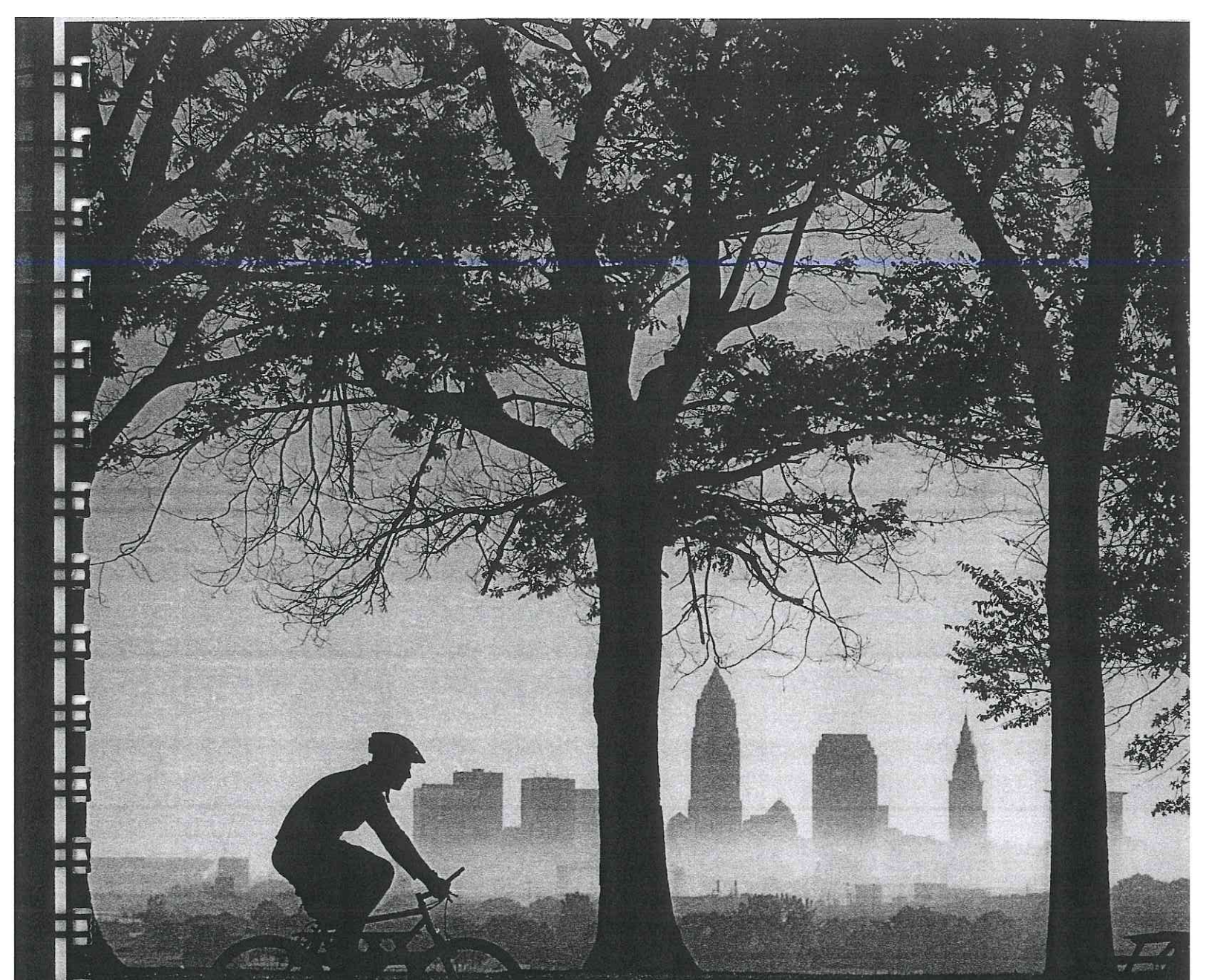




**P**lease accept Cleveland's proposal package for Amazon HQ2, put together through a highly collaborative effort of city, county, state, civic and business organizations.

We sincerely hope our proposal gives you a strong sense of our city's excitement, momentum and readiness to welcome you here. We look forward to your questions, and hope you will come to Cleveland to judge for yourself.

*Cleveland*



# LETTERS OF SUPPORT



JOHN R. KASICH  
GOVERNOR  
STATE OF OHIO

September 29, 2017

Mr. Jeff Bezos  
Chairman, President and Chief Executive Officer  
Amazon.com Inc.  
410 Terry Avenue North  
Seattle Washington 98109

Dear Jeff,

It is exciting that Amazon has launched its search for a second U.S. headquarters operation to support your company's rapid growth and innovation. It was a pleasure hosting Paul Misener in Columbus the day the news of the search was released. We are thankful to have had the opportunity to discuss the project in-person and appreciate the insight he and your team have provided. This project represents the culmination of your company's commitment to a new way of thinking.

JobsOhio and my cabinet directors are fully mobilized and have their top talent actively engaged on your project.

We understand that workforce is a key factor that will be considered as you make your location decision. Ohio has worked successfully to create a workforce development system that offers access to the skilled workers companies need. Additionally, Ohio has more universities per capita than any other state in the country, together with several of the country's leading research institutions, including The Ohio State University, the University of Cincinnati, Battelle, Case Western Reserve University, and the U.S. Air Force's main research lab at Wright Patterson Air Force Base.

A state's stability is also a key factor in your decision we expect, and Ohio provides a predictable business climate that reduces your risks and increases your speed to market, as demonstrated by the success of the 25 Fortune 500 companies headquartered in Ohio. Ohio's financial position is strong and growing. We have consistently maintained a balanced budget with more than \$2 billion in reserves and achieved one of the nation's largest tax cuts, saving families and businesses \$5 billion.

The selection of your second U.S. headquarters is a historic opportunity. The Ohio team has enjoyed the relationship we have developed with many Amazonians helping you launch your 14<sup>th</sup> Amazon Web Services Region, several Fulfillment Centers throughout the state, and collaborating with Amazon EDUCATE on cloud services education. Please know that my administration and the entire state of Ohio will be very proud to be Amazon's second home.

Sincerely,

A handwritten signature in black ink, appearing to read "John R. Kasich".

John R. Kasich  
Governor

77 SOUTH HIGH STREET • 30TH FLOOR • COLUMBUS, OHIO 43215-6117 • 614.466.3555

# United States Senate

WASHINGTON, DC 20510

October 5, 2017

Mr. Jeffrey Bezos  
Founder, President, CEO & Chairman  
Amazon.com, Inc.  
410 Terry Avenue North  
Seattle, Washington 98109

Dear Mr. Bezos,

We write to urge you to select Ohio for your new second headquarters.

Our state is home to over 11.6 million people with over half of them living within an hour commute or less of a major metropolitan area. Ohio is within 600 miles of 60% of the entire U.S. population as well as 70% of all U.S. and Canadian manufacturing. Transportation is critical, and Ohio is fortunate to have access to major airports which provide millions with air travel annually and state-of-the art inland ports.

Ohio has a business-friendly environment and is home to an expansive network of renowned colleges and universities that will mobilize to provide the talent critical to this project. Ohio's workforce is well over 5.7 million. These attributes along with a strong partnership and support from state government, JobsOhio, and the state's economic development organizations make Ohio the ideal location for this project.

We are fully committed to facilitating job growth in the state and are happy to offer our support to this important project. This potential multi-billion dollar investment, which could lead to 50,000 direct employment jobs, will have a significant economic impact for Ohio.

We urge you to select Ohio for this investment and we would like to extend an invitation for you to meet with us at your convenience.

Thank you for your consideration.

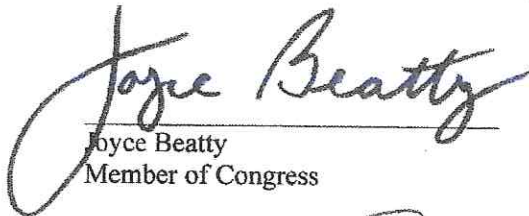
Sincerely,

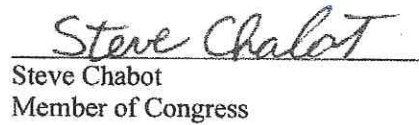


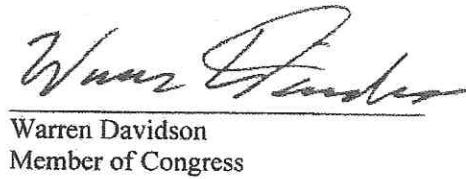
Rob Portman  
United States Senator

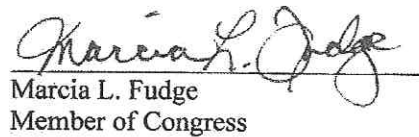


Sherrod Brown  
United States Senator

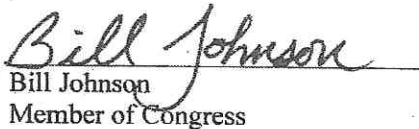
  
Joyce Beatty  
Member of Congress

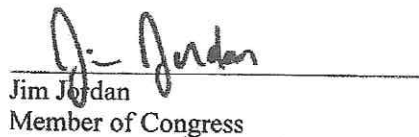
  
Steve Chabot  
Member of Congress

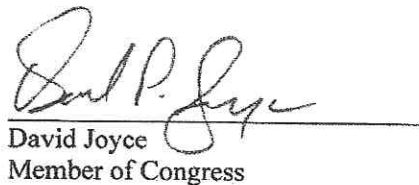
  
Warren Davidson  
Member of Congress

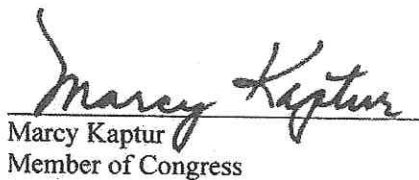
  
Marcia L. Fudge  
Member of Congress

  
Bob Gibbs  
Member of Congress

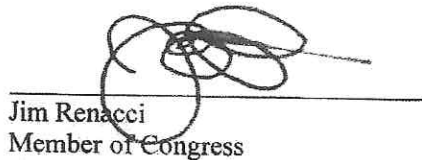
  
Bill Johnson  
Member of Congress

  
Jim Jordan  
Member of Congress

  
David Joyce  
Member of Congress

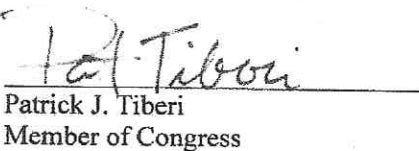
  
Marcy Kaptur  
Member of Congress

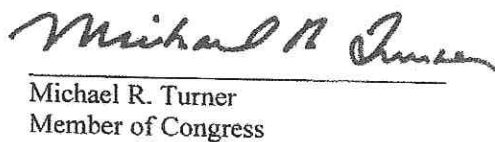
  
Robert E. Latta  
Member of Congress

  
Jim Renacci  
Member of Congress

  
Tim Ryan  
Member of Congress

  
Steve Stivers  
Member of Congress

  
Patrick J. Tiberi  
Member of Congress

  
Michael R. Turner  
Member of Congress

  
Brad Wenstrup  
Member of Congress



**91st House District**

Clinton County  
Highland County  
Pike County  
Ross County



**Committees**

Joint Legislative Ethics Committee  
Rules and Reference Committee  
Legislative Service Commission  
Capitol Square Review and Advisory Board

**Columbus Office**

Vern Riffe Center  
77 S. High Street  
14th Floor  
Columbus, Ohio 43215-6111  
(614) 466-3506  
[Rep91@ohiohouse.gov](mailto:Rep91@ohiohouse.gov)  
[www.ohiohouse.gov](http://www.ohiohouse.gov)

**Clifford A. Rosenberger**  
**Speaker, Ohio House of Representatives**  
**132<sup>nd</sup> General Assembly**

October 3, 2017

Mr. Jeff Bezos  
Chairman, President and Chief Executive Officer  
Amazon.com, Inc.  
410 Terry Avenue North  
Seattle Washington 98109

Dear Mr. Bezos,

As Speaker of the Ohio House, I would like to offer my support for the state of Ohio in Amazon's search for locating its second headquarters. Our state has already proven it has the infrastructure in place for such a venture, with other recent developments from Amazon, Facebook, and Honda. I recognize the significant impact of this investment and am confident that Ohio is the best location to move forward with the project given our state's stable business climate, top ranked universities and research institutions, and strong work ethic.

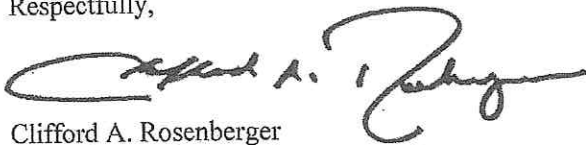
Our state is home to more than 11.5 million people, with over half of them living within an hour commute of a major metropolitan area. Ohio is within 600 miles of 60 percent of the entire U.S. population, as well as 70 percent of all U.S. and Canadian manufacturing. Transportation is critical, and Ohio is fortunate to have access to major airports that provide millions of people with air travel annually and state-of-the art inland ports.

Further, Ohio has a business-friendly environment and is home to an expansive network of renowned colleges and universities that will mobilize to provide the talent needed for this project. Ohio's workforce consists of well over 5.7 million men and women, people I know to be hardworking, capable, and ready to take on careers that will enable them to provide for their families. These attributes, along with a strong partnership and support from state government, JobsOhio, and the state's economic development organizations, make Ohio the ideal location for this project.

I am fully committed to facilitating job growth in the state and am happy to offer my support to this important project. This potential multi-billion dollar investment, which could lead to 50,000 direct jobs, will have a significant economic impact for Ohio.

I urge you to select Ohio for this historic investment and would like to extend an invitation to meet at your convenience. It's clear now, more than ever, Ohio is the place to be.

Respectfully,

A handwritten signature in cursive script, appearing to read "Clifford A. Rosenberger". The signature is written in dark ink and is positioned above the printed name.

Clifford A. Rosenberger  
Speaker, Ohio House of Representatives



October 9, 2017

Jeff Bezos  
Founder, Chairman, and CEO  
Amazon.com Incorporated  
410 Terry Ave North  
Seattle, WA 98109

Dear Mr. Bezos,

As statewide elective officials representing Ohio, we write today in support of the Cleveland and Cuyahoga County Project Partners' efforts to attract Amazon's new headquarters to Downtown Cleveland. A new headquarters of this scale and significance will positively transform our region and improve quality of life for our constituents.

The 50,000 new jobs created will improve regional employment options and allow for increased public services for constituents. The ancillary developments that will come with the expected 8 million square feet of real estate development will further compound these positive effects.

Cleveland is a stable city with a business-friendly environment and welcomes the opportunity to host your new headquarters. We are in full support of this bid and appreciate your consideration.

Sincerely,

Handwritten signature of Kenny Yuko in cursive.

Senate Minority Leader Kenny Yuko  
25<sup>th</sup> Senate District

Handwritten signature of Michael J. Skindell in cursive.

Senator Michael Skindell  
23<sup>rd</sup> Senate District

Handwritten signature of Kent Smith in cursive.

State Representative Kent Smith  
8<sup>th</sup> House District

Handwritten signature of Janine Boyd in cursive.

State Representative Janine Boyd  
9<sup>th</sup> House District



State Representative Stephanie Howse  
11<sup>th</sup> House District



State Representative Nickie J. Antonio  
13<sup>th</sup> House District



State Representative Martin J. Sweeney  
14<sup>th</sup> House District



State Representative Nicholas Celebrezze  
15<sup>th</sup> House District



City of Cleveland  
Frank G. Jackson, Mayor

Office of the Mayor  
Cleveland City Hall  
601 Lakeside Avenue, Room 202  
Cleveland, Ohio 44114  
216/664-3990 • Fax 216/420-8766  
[www.cleveland-oh.gov](http://www.cleveland-oh.gov)

October 13, 2017

Jeff Bezos  
Founder, Chairman, and CEO  
Amazon.com Incorporated  
410 Terry Ave North  
Seattle, WA 98109

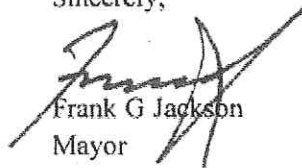
Dear Mr. Bezos,

On behalf of the residents of Cleveland, I am writing in support of the Cleveland and Cuyahoga County Project Partners' efforts to bring Amazon's new headquarters to Downtown Cleveland. A new headquarters of this scale and significance will positively transform our city and improve quality of life for residents.

The 50,000 new jobs created will improve local employment options and provide for increased city services. The ancillary developments that will come with the expected 8 million square feet of real estate development will compound these positive effects.

If you have any questions regarding my support of the Cleveland and Cuyahoga County Project Partners' bid for Amazon's HQ2, please contact Valarie J. McCall, Chief of Government & International Affairs via email at [vmccall@city.cleveland.oh.us](mailto:vmccall@city.cleveland.oh.us). Thank you for your consideration.

Sincerely,

  
Frank G Jackson  
Mayor

An Equal Opportunity Employer



Cuyahoga County  
Together We Thrive

Armond Budish  
Cuyahoga County Executive

To Whom It May Concern,

I am proud to represent the people of Cuyahoga County in our bid to bring Amazon HQ2 to our region.

As a county government, we have many important priorities, but at the top of the list is economic development and job creation for our region. In fact, those very terms are built into our charter. We know that we can effectively support the HQ2 project in Cleveland, in all the areas that Amazon named as priorities in the RFP. We have a recent history of very successful execution of major construction projects, of supporting commercial development, and of hosting major national events (including the RNC which drew tens of thousands to our region). We believe that we will be the right partner for Amazon, recognizing that the positive impact of your presence here will be unprecedented.

Of course, we all know that we are one of many in this historic bid. But we are used to competition and to long-shots. As LeBron James said, "In Cleveland nothing is given, everything is earned."

It's that grit and determination that LeBron alludes to that sets us apart. As discussed in our presentation, Cleveland has unique assets that are more than physical – we are a people that embraces newcomers and enjoys an unprecedented level of collaboration and cooperation as we work together to make this region great.

We are all committed to transformation and to a vibrant, prosperous community. I hope you will join us.

Sincerely,

Armond Budish  
County Executive



October 13, 2017

Mr. Jeff Bezos  
Chairman and CEO  
Amazon.com Inc.  
410 Terry Ave. North  
Seattle, WA 98109

Dear Mr. Bezos:

Cleveland is very excited about the opportunity to submit a proposal for the Amazon HQ2 project. Amazon's recent investment in our Northeast Ohio region has been a catalyst to revitalize our communities, and we look forward to partnering with you to shape the future of Northeast Ohio with the creation of the HQ2 project in the heart of Cleveland's Central Business District.

The business community throughout Northeast Ohio has a proven track record of working together to achieve great success. We have initiated and completed dozens of large, transformational civic and real estate development projects over the last 5 years that have created a vibrant downtown community. Over \$8 billion has been invested in the City of Cleveland since 2012, Amazon has the opportunity to take advantage of these investments and shape the next phase of that growth for our mutual benefit.

Our regional strengths in the healthcare, legal, financial, and insurance industries will help extend your reach into new markets – but our people are our greatest asset, much like your customers are to you. Cleveland will accelerate your company's growth and global reach, at a much lower cost than other markets. You will be joining a strong cast of growing HQ operations that call Cleveland and Northeast Ohio home.

Greater Cleveland's Momentum is on the rise, and we look forward to a long and prosperous partnership with you and your team.

We look forward to welcoming you to Northeast Ohio!

Bill Koehler  
CEO, Team NEO

Joe Roman  
CEO, Greater Cleveland Partnership



October 13, 2017

Mr. Jeff Bezos  
Chairman and CEO  
Amazon.com Inc.  
410 Terry Avenue North  
Seattle, Washington 98109

Dear Mr. Bezos,

I am writing with regard to Amazon's HQ2 location decision. With more than 30 years of experience in senior management positions in government, the nonprofit sector and the private sector, including serving as a former president of Panasonic North American R&D, and former managing director and chief operating officer of In-Q-Tel (the CIA's venture capital fund), I have a good appreciation for the type of environment that would best meet Amazon's needs. I am convinced that Cleveland, Ohio represents an unparalleled opportunity for Amazon to further its incredible, game-changing trajectory alongside a community that is in the middle of its own game-winning resurgence.

My career has taken me to all corners of this world, including five years in new business development in Silicon Valley, and nearly 15 years ago it brought me to Cleveland to lead the Cleveland Foundation, the world's first community foundation and one of the largest today. And I chose Cleveland for its accessibility, its history of innovation, and a promising future focused on inclusive, economic growth – all the reasons why Amazon would also prosper here. Nearly 70 percent of the U.S. population lives within one day's driving distance. We have world-class anchor institutions, including medical (the Cleveland Clinic and University Hospitals), scientific (NASA), academic (Case Western Reserve University) and cultural (the Cleveland Orchestra, Cleveland Museum of Art, the Rock and Roll Hall of Fame). We have an incredible environmental backdrop – from the shores of Lake Erie to the emerald necklace of our best-in-class Cleveland Metroparks. We have affordable housing, accessible transit and a quality of life that is revered beyond Cleveland.

While all of these assets should raise Cleveland to the top of your consideration set, it is our people that differentiate this community from all others – and the residents of Cleveland are our business. For more than a century, the Cleveland Foundation has been working to enhance the lives of Greater Clevelanders. Since 1914, we have invested more than \$2 billion in strategies to make Cleveland thrive, including nationally-recognized public education reform (with a specific focus on STEM and workforce alignment), economic development, neighborhood revitalization, health and human services, digital literacy and so much more. Last year, we granted more than \$93.6 million across all impact sectors, including new strategies in digital excellence, IT talent pipeline development and a university collaborative to drive an Industrial Internet of Things economy to establish our region as a leader in digital innovation. We are uniquely focused on creating a city-wide human capital strategy that creates generations of trained workers for the family-sustaining jobs of today and the future.

**I'd also like to point out that Cleveland can offer you something that no other city can offer. The foundation is spearheading the effort to build the nation's first freshwater wind farm, right in Lake Erie. We are also leading the charge to develop a microgrid for Cleveland, which would allow us to decouple from the national grid and thus become invulnerable to cyberattack. We can do this because Cleveland is the only city in the U.S. that has its own power company – Cleveland Public Power. We actually have two sets of power lines in Cleveland – one is for Cleveland Public Power and the other is for FirstEnergy, an investor-owned utility company. It would seem to me, given the importance of cybersecurity to your business, having a second headquarters that could be off the national power grid by the time you establish your headquarters here would be immensely valuable. I'm also certain we have and can attract the best human talent to meet your needs.**



I'd welcome the opportunity to meet you and your team to make the case for Cleveland. Please do not hesitate to call me at 216-615-7136 if I can be of any assistance as you consider Cleveland's proposal.

Warmest regards,

*Ronald B. Richard*

Ronald B. Richard  
President and CEO

Mr. Jeff Bezos  
Chairman and CEO  
Amazon.com Inc.  
410 Terry Avenue North  
Seattle, Washington 98109

Dear Mr. Bezos:

It is with great enthusiasm that I express the support of organized philanthropy for the proposed Amazon Headquarters to be located in Cleveland, Ohio. We stand ready to work with you and other community partners to make your campus a truly extraordinary place that will enhance your business competitiveness and cement Amazon's reputation as a forward-thinking, progressive corporation.

The Fund for Our Economic Future has refashioned the norms of how philanthropy works towards the economic vibrancy of a community. Unique in our field, the Fund is a collaboration of roughly 40 funding institutions across Northeast Ohio who have pooled their resources, talent, networks, and reputations to define and execute a shared regional agenda of big economic ideas. Our members include traditional foundations, corporate giving programs, endowment-based institutions, universities, hospitals, and high net worth individuals. Our mission calls for us to advance economic growth with equitable access to opportunity. We do this through grant making, research, and civic leadership.

The Fund works in the areas of job creation (e.g., entrepreneurship, the digital economy), job preparation (e.g. developing talent supply chains for our industry sectors, fostering inclusive strategies that create family-sustaining careers) and job access (e.g., business-focused placemaking, worker mobility solutions, transit redesign). All of our work is pursued in partnership with the business community as well as elected officials, higher education, and other civic organizations.

Having philanthropy at the economic table means that our community has more robust and inclusive strategies. We bridge the economic and community development worlds, ensure that issues of inclusion are effectively and efficiently incorporated from the beginning of a project and bring innovative funding that can take a long-term perspective. I strongly suspect that all of these elements will be critical to Amazon as it builds out its headquarters presence.

We stand ready to be your partner – in both the short- and long-term – should you choose Cleveland as your preferred location.

Sincerely,



Bradley W. Whitehead, President





**ILENE  
SHAPIRO**  
COUNTY EXECUTIVE

October 12, 2017

Mr. Jeffrey Bezos  
Founder, President, CEO & Chairman  
Amazon.com, Inc.  
410 Terry Avenue North  
Seattle, Washington 98109

Re: Amazon HQ 2

Dear Mr. Bezos,

Northeast Ohio has a long history of working together in creative and transformational ways. We are a region that shares and supports our corporations, infrastructure, beloved sports teams, abundant cultural and recreational amenities, as well as our most valuable asset, our people. As Summit County Executive, the region's second largest county, I am proud to offer my support to the region's proposal of our most competitive location option for an Amazon campus in the City of Cleveland, Ohio.

Northeast Ohio is a compelling place to do business because of our low cost of living, low cost of doing business, and rich natural resources. Logistically, Northeast Ohio is within a 500 mile radius of nearly half of all US households placing us within an 8 hour drive to major US markets like New York, Chicago and Washington D.C. and further being served by an international airport, several domestic airports and the Port of Cleveland. Additionally, Northeast Ohio ranks 15<sup>th</sup> in the nation as the largest metropolitan labor market, the largest in Ohio.

Lastly, and most importantly, Northeast Ohio has a diverse and talented workforce. In Summit County and Northeast Ohio there are individuals who have experience that would fit Amazon HQ 2's needs. I am confident that our strong universities, colleges and trade schools will meet Amazon HQ 2's workforce needs in our community today.

I believe that Amazon will play an integral role in heightening and continuing the momentum being built in the communities across Northeast Ohio. If there is anything my team or I could do to help in working through the decision process, please do not hesitate to let me know. You can best reach me at (330) 643-5555. Thank you for considering Northeast Ohio and I look forward to continuing to work with your company at your current Summit County locations and hopefully at Amazon HQ 2.

Sincerely,

Ilene Shapiro  
Summit County Executive





## City of Akron, Ohio

DANIEL HARRIGAN, MAYOR

October 12, 2017

Mr. Jeffrey Bezos  
Founder, President, CEO and Chairman  
Amazon.com, Inc.  
410 Terry Avenue North  
Seattle, Washington 98109

Dear Mr. Bezos:

Northeast Ohio has a long history of working collaboratively with partners and stakeholders in creative and transformational ways. We are a region that shares and supports corporations, infrastructure, beloved sports teams, abundant cultural and recreational amenities, as well as our most valuable asset, our people.

The City of Akron is proud to support the region's proposal of our most competitive location option for an Amazon campus in our neighboring city of Cleveland. In addition to a talented workforce, an impressive array of suppliers, quality housing options and market proximity, the assets in nearby Akron neatly align with Cleveland and Amazon; therefore, strongly contributing to your overall success in Northeast Ohio.

Akron offers access to three world-class healthcare systems, and world headquarters for two Fortune 500 companies – Goodyear Tire & Rubber Co. and FirstEnergy. We are home to The University of Akron, which has 200 undergraduate and 100 masters and doctoral programs, a law degree (with four program options), and a pathway to a medical degree at the Northeast Ohio Medical University. Our robust region also is home to The University of Akron National Polymer Innovation Center and the Kent State University Liquid Crystal Institute.

The energy and investment in Northeast Ohio is tremendous. We understand that when the region works as one, we can accomplish anything. Our track record of corporate and community success speaks for itself. We believe Amazon will play a vital role in heightening and continuing our momentum. Our cities are affordable, cool, creative, world class places that everyone is talking about. We are the communities of Akron and Cleveland; and we encourage Amazon to join us on the I-77 innovation spine that joins Akron, Canton, Cleveland and Kent as an integral part of the American economy.

If there is anything I can do to assist you through the decision-making process, let me know. We look forward to welcoming Amazon.com, Inc. to Northeast Ohio.

Sincerely,

Daniel Horrigan

200 Municipal Building • 166 South High Street • Akron, Ohio 44308-1653  
Phone: (330) 375-2345 • Fax: (330) 375-2468 • E-Mail: mayor@akronohio.gov  
www.akronohio.gov



Development  
Services Agency

John R. Kasich, Governor

David Goodman, Director

October 2, 2017

Mr. Jeff Bezos  
Chairman, President and Chief Executive Officer  
Amazon.com, Inc.  
410 Terry Avenue North  
Seattle, Washington 98109

Dear Mr. Bezos,

Everything you are looking for can be found right here in Ohio.

Ohio is the best choice for Amazon's HQ2 because of the quality of our people and workforce, our foundation for technology, and the quality of life found in strong communities across Ohio.

The Ohio Development Services Agency helps communities grow strong through economic infrastructure that makes Ohio an attractive place to start a business, grow a business, work, play, and live. The Development Services Agency has an established record of supporting Ohio's small businesses, promoting entrepreneurship and innovation through technologies, and assisting the communities that house our businesses, entrepreneurs, innovators, and workers.

Since the days of Edison and the Wright Brothers, the innovative spirit has always been a part of the fabric of Ohio. The state created Ohio Third Frontier in 2002 to invest in a strong tech foundation; stimulating attraction and growth of tech companies by providing necessary business assistance, capital, and talent resources. The resulting infrastructure is a unique advantage that could benefit Amazon in establishing its HQ2 here.

My team and I look forward to facilitating future growth by actively assisting your company in partnership with Governor Kasich, JobsOhio, and the larger Ohio team.

The Ohio Development Services Agency and the entire state of Ohio will be very proud to be Amazon's second home.

Sincerely,

David Goodman  
Director

27 South High Street  
P.O. Box 100  
Columbus, Ohio 43216-0100 USA  
www.ohio.gov  
614 | 468 2800  
600 | 468 1200  
www.ohio.welcomeinohio.gov  
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Department of  
Higher Education

John R. Kasich, Governor  
John Carey, Chancellor

September 29, 2017

Mr. Jeff Bezos  
Chairman, President, and Chief Executive Officer  
Amazon.com, Inc.  
410 Terry Avenue North  
Seattle, Washington 98109

Dear Mr. Bezos,

The Ohio Department of Higher Education has thoroughly enjoyed its engagement with Amazon. Our public colleges and universities in various parts of the state have helped with the launch of your 14<sup>th</sup> Amazon Web Services Region and several Fulfillment Centers around the state. And collaboration with Amazon EDUCATE on cloud services education will be of great benefit to our schools and our students.

The opportunity to support a second U.S. headquarters operation in Ohio has generated much excitement within the state's higher education arena. This is a significant investment for Amazon, and our agency is confident that Ohio is the best location to support not only your project talent needs, but also the other aspects of running a headquarters operation.

The Department of Higher Education is actively involved with JobsOhio and our regional partners, and I can say with confidence that no matter where you land in Ohio, our entire team is ready to assist you.

Our 14 public universities, 23 community colleges, and 56 Ohio Technical Centers are fertile ground for developing the talent needed to fill Amazon's workforce needs. Additionally, our campuses have tremendous research facilities and the capacity to work side by side with your visionary leaders in developing advancements to products and services vital to a thriving headquarters operation.

The Department of Higher Education looks forward to being part of the Amazon growth strategy by actively assisting your company in partnership with Governor Kasich, JobsOhio, and the rest of the Ohio team.

---

25 South Front Street  
Columbus, Ohio 43215

phone 614.466.6000  
fax 614.466.5866  
web [www.OhioHigherEd.org](http://www.OhioHigherEd.org)

Please know that the Ohio Department of Higher Education joins the entire state in saying we'd be extremely proud to have Ohio as Amazon's second home.

Sincerely,

A handwritten signature in black ink that reads "John Carey". The signature is written in a cursive, slightly slanted style.

John Carey  
Chancellor, Ohio Department of Higher Education



**Public Utilities  
Commission**

Asim Z. Haque, Chairman

Commissioners

M. Beth Trombold  
Thomas W. Johnson  
Lawrence K. Friedeman  
Daniel R. Conway

September 28, 2017

Mr. Jeff Bezos  
Chairman, President, and Chief Executive Officer  
Amazon.com Inc.  
410 Terry Avenue North  
Seattle, Washington 98109

Dear Mr. Bezos:

I hope this correspondence finds you well. The State is very excited about the prospect of hosting Amazon's second headquarters operation. To that end, I wanted to write to you as the Chief regulator of energy and utilities in the State of Ohio to express my sincere intent to be as helpful as possible in ensuring that safe, reliable, and affordable utility services are delivered to the site you are considering.

The PUCO and the Ohio Power Siting Board (OPSB), an organization that I also Chair, monitor the various economic development opportunities that are ongoing in the State. We strive to ensure that we are doing our part in avoiding unnecessary hassle and delay for any application or inquiries filed with either body.

Please know that if you decide to locate in the State of Ohio, you will have a partner in the PUCO and the OPSB.

Very Truly Yours,

Asim Z. Haque  
Chairman, Public Utilities Commission of Ohio  
Chairman, Ohio Power Siting Board

180 East Broad Street  
Columbus, Ohio 43215-3793

(614) 466-3016  
[www.PUCO.ohio.gov](http://www.PUCO.ohio.gov)

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John R. Kasich, Governor  
Mary Taylor, Lt. Governor  
Craig W. Butler, Director

September 22, 2017

Mr. Jeff Bezos  
Chairman, President and Chief Executive Officer  
Amazon.com, Inc.  
410 Terry Avenue North  
Seattle, WA 98109

Dear Mr. Bezos:

This letter is written as a follow-up to recent discussions with JobsOhio regarding the potential location of Amazon's U.S. headquarters in Ohio.

Ohio EPA has decades of experience in processing permits for a wide variety of projects. We have many examples where we have exceeded expectations regarding permit processing timelines for large projects in Ohio, including permits for three Amazon Web Services data centers recently constructed in Central Ohio.

Specific to your data centers, air permits were required for generators, along with a permit for extending the sewer line and a construction storm water permit. Our experienced team worked closely with Amazon to meet the construction timelines for the project and permits were issued ahead of schedule.

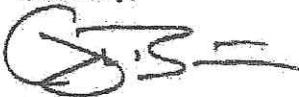
For the headquarters operation, there may be permits required from Ohio EPA for construction-related activity and for extending water and/or wastewater infrastructure. We look forward to working with your team to determine what permits will be applicable and will make issuing necessary permits a priority.

As you can appreciate, one important factor in efficiently processing permits is open communication throughout the review process. I fully expect my team to again work closely with Amazon throughout the entire permitting process. Establishing a communication strategy upfront that includes regular meetings or conference calls helps to quickly identify and resolve any issues that come up during the review process.

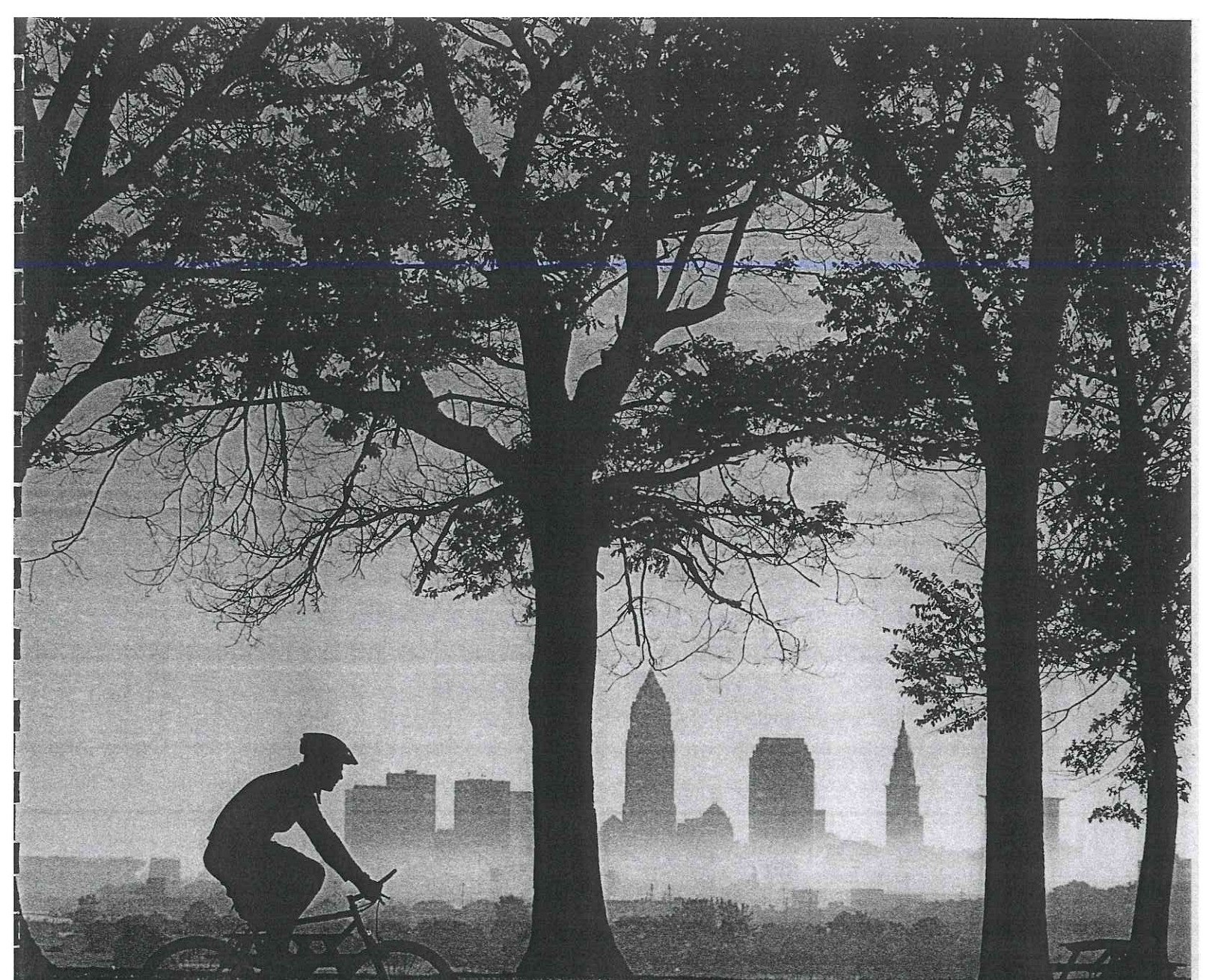
In addition, it is Ohio EPA's practice to have a single point of contact for important projects such as yours. Laurie Stevenson, Deputy Director of Business Relations, who reports directly to me, will serve as a single point of contact for this project. Her role is to work closely with your team and Ohio EPA senior leadership to monitor progress in reviewing permit applications and assist in facilitating any discussions needed to resolve issues.

I am very confident in our ability to work successfully with the Amazon team to meet your goals on timely environmental permitting. We look forward to the opportunity to work with you. If you have any additional questions, feel free to contact Laurie Stevenson at 614-644-2344 or by email at [laurie.stevenson@epa.ohio.gov](mailto:laurie.stevenson@epa.ohio.gov).

Sincerely,

A handwritten signature in black ink, appearing to read 'C. Butler', with a stylized flourish at the end.

Craig W. Butler  
Director



# SITE BUILDING

## **MASSING MODEL PHASE OVERVIEW**

The Amazon development proposal utilizes several existing buildings and conceptual new construction to illustrate how a Cleveland HQ2 of 8 million-plus square feet can be realized. The proposed real estate is divided into three sections: Initial-Build Out, Full-Build Out, and Additional Development Opportunities.

### **Initial Build-Out**

The Initial Build-Out phase incorporates existing buildings and pad-ready sites that can provide an estimated 4.73 million square feet of space, including 882,600 square feet of office space to meet Amazon's immediate needs. The three property owners of these sites are civic leaders who have agreed to make their properties available for development for the Amazon HQ2 project. Their signed commitment letter to this end is included in the appendix. This pledge assures both immediate occupation of existing structures and the prompt initiation of development plans for vacant sites.

### **Full Build-Out**

The Full Build-Out sites encompass both existing buildings and additional development sites that can accommodate an estimated 5,546,500 square feet of additional mixed-use space, providing options and flexibility for meeting HQ2's 8 million square foot requirement. These properties are controlled by owners who have been engaged during this process and have expressed interest in collaboration should Cleveland be selected as the future location of HQ2.

### **Additional Development Opportunities**

The proposal provides sites able to accommodate an additional 3,172,235 square feet of mixed-use development adjacent to the Initial and Full Build-Out sites, anticipating that Amazon may experience greater than anticipated growth or desire even greater development flexibility. These properties also are controlled by owners engaged during this process and interested in collaboration should Cleveland be selected as the future location of HQ2.

## Methodology

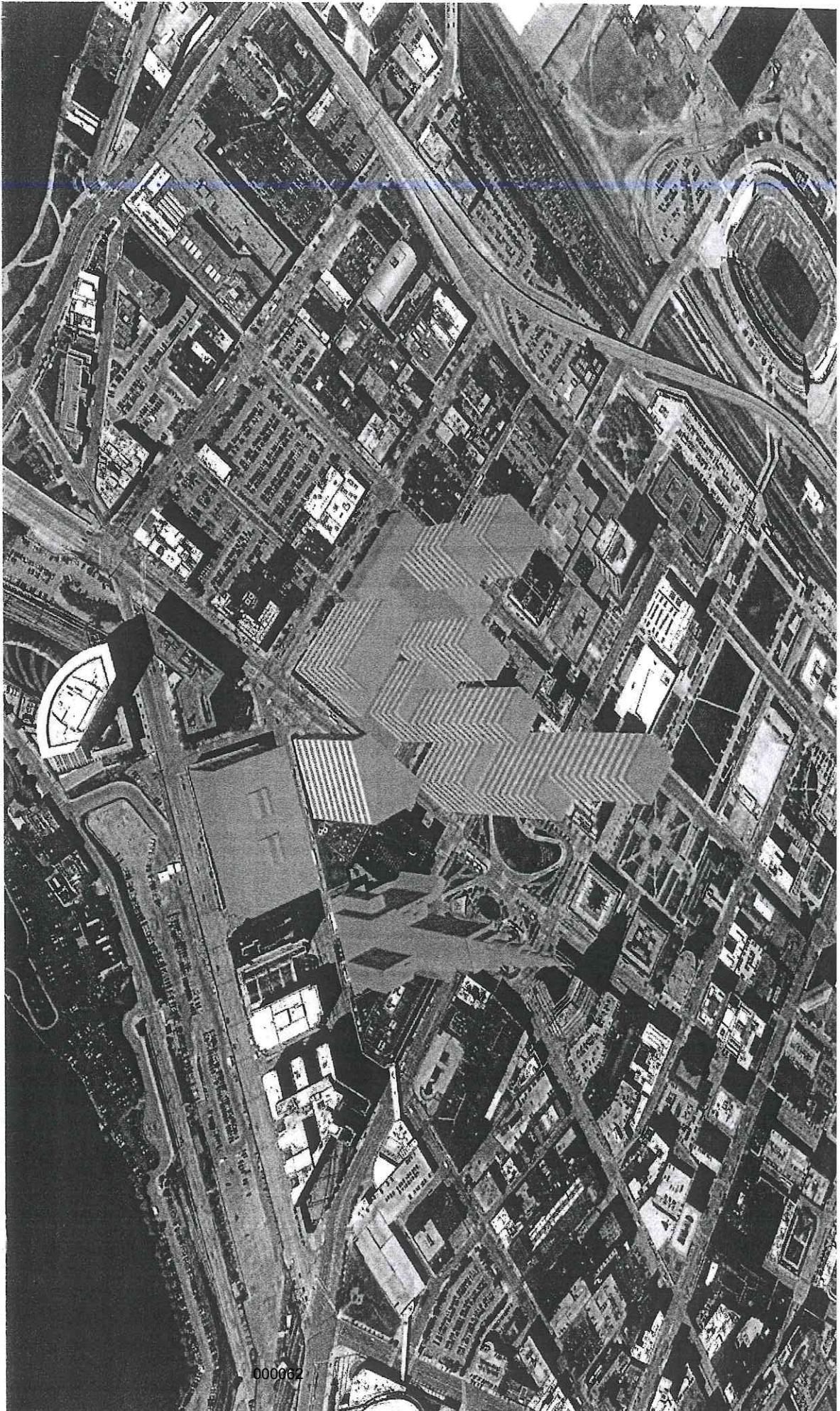
The square footage from existing structures is calculated based on the current available office space which, in some cases, represents the building's full rentable square footage.

Total square footage for new construction proposals were determined using conservative baseline methods, including:

- » Calculating total building height based on 15-foot-high floors, allowing for both ample ceiling height and infrastructure space;
- » Reducing gross square footage of 10 percent (and, in some cases, 15 percent) to allow for common area/vertical access;
- » Determining final height, setback, and overall massing based on both previously developed plans for particular sites and through the contextual scale of surrounding buildings.

The final square footage figures (contained herein) offer a pragmatic glimpse of the potential initial development, successive full-build out of over 8 million square feet, and additional development opportunities proximate to the core site.

While there are approximately 70 Microgrids currently operating in the United States, only about 15 can serve commercial uses, and they are small. The Cleveland Microgrid will be significantly larger, capable of serving a variety of end-users.

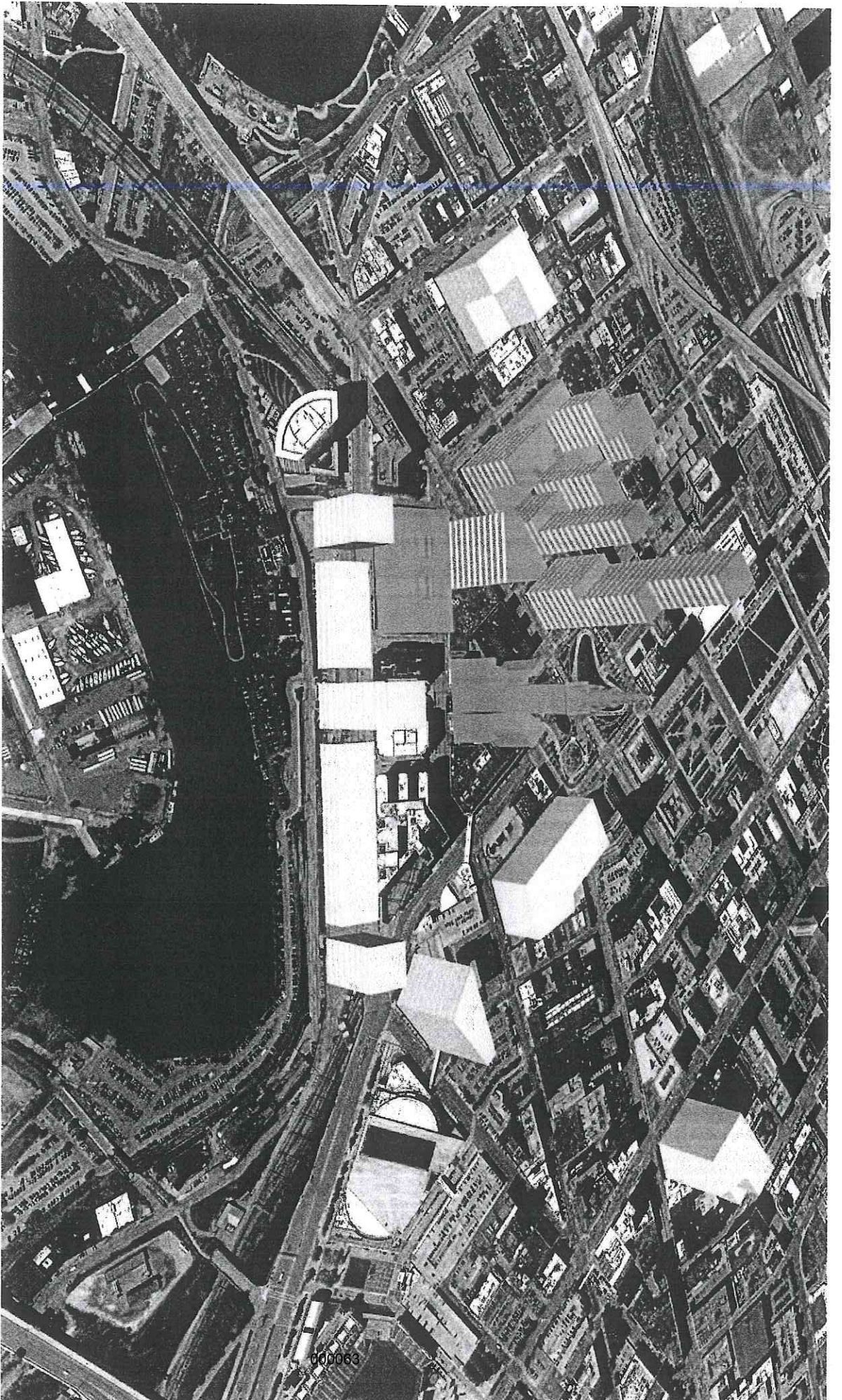


**INITIAL BUILD-OUT**

MASSING MODEL	Proposed Building Use	Site Acreage	Bldg. Height (ft)	Total Floors	Floor Area 1	Floors	SF	Floor Area 2	Floors	SF	Floor Area 3	Floors	SF	Bldg. Gross SF	Common Area %	Net Rentable SF
1 (Public Square Tower)	Office-Mixed Use	1.17	810	54	39,375	16	630,000	28,125	18	506,250	18,750	20	375,000	1,511,250	0.1	1,360,125
2 (Western SE Office Tower)	Office-Mixed Use	2.24	555	37	30,000	10	300,000	12,500	27	337,500	-	-	-	637,500	0.1	573,750
3 (Western NW)	Office-Mixed Use	1.06	240	16	57,500	5	287,500	25,000	11	275,000	-	-	-	562,500	0.1	506,250
4 (Western NE)	Office-Mixed Use	0.93	300	20	17,500	20	350,000	-	-	-	-	-	-	350,000	0.1	315,000
5 (Western NW)	Office-Mixed Use	1.45	240	16	17,500	16	280,000	-	-	-	-	-	-	280,000	0.1	252,000
6 (St. Clair-W. Blvd)	Office-Mixed Use	1.16	150	10	34,200	10	342,000	-	-	-	-	-	-	342,000	0.1	307,800
7 (Renaissance Garage)	Office-Mixed Use	0.92	300	20	31,700	20	634,000	-	-	-	-	-	-	634,000	0.15	538,900

EXISTING BUILDINGS	Office-Housing	Office-Housing
A (Post Office Plaza)	477,000	
B (Terminal Tower)	405,600	
<b>SUBTOTAL RENTABLE SF</b>		<b>4,736,425</b>

000062

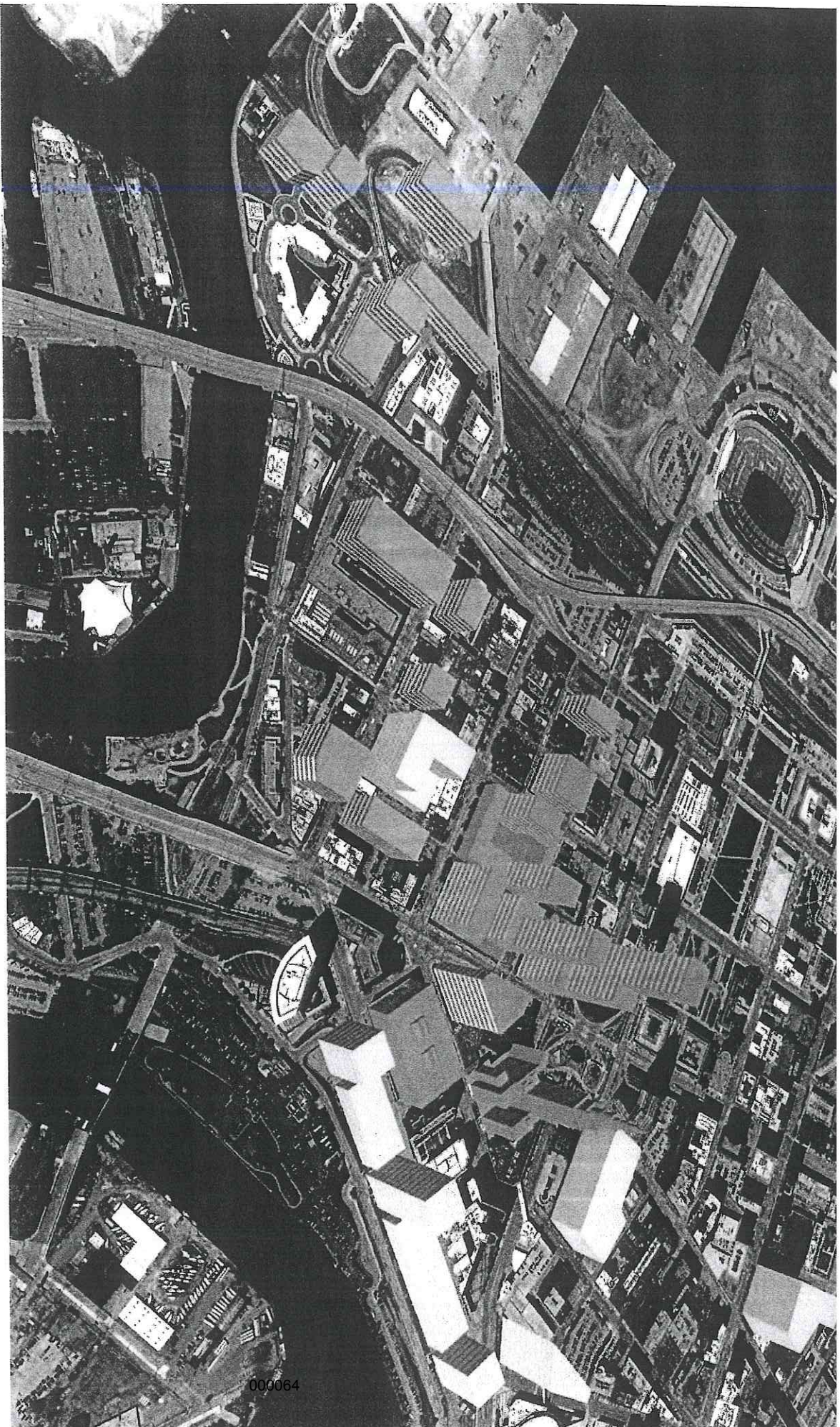


**FULL BUILD-OUT**

MASSING MODEL	Proposed Building Use	Site Acreage	Bldg. Height (ft)	Total Floors	Floor Area 1	Floors	SF	Floor Area 2	Floors	SF	Floor Area 3	Floors	SF	Bldg. Gross SF	Common Area %	Net Rentable SF
8 (St. Clair - W. 9th South)	Office-Mixed Use	2.27	225	15	82,500	5	412,500	56,250	10	562,500	-	-	-	975,000	0.1	877,500
9 (Huron Hillside - Center Tower)	Office-Mixed Use	27.35	360	24	22,500	24	540,000	-	-	-	-	-	-	540,000	0.1	486,000
10 (Huron Hillside - West Tower)	Office-Mixed Use	"	225	15	22,500	15	337,500	-	-	-	-	-	-	337,500	0.1	303,750
11 (Huron Hillside - East Tower)	Office-Mixed Use	"	225	15	22,500	15	337,500	-	-	-	-	-	-	337,500	0.1	303,750
12 (Huron Hillside - West Tower)	Office-Mixed Use	"	90	6	52,500	6	315,000	-	-	-	-	-	-	315,000	0.1	283,500
13 (Huron Hillside - East Tower)	Office-Mixed Use	"	90	6	90,000	6	540,000	-	-	-	-	-	-	540,000	0.1	486,000
14 (Gateway North Garage)	Office-Mixed Use	0.82	300	20	28,000	20	560,000	-	-	-	-	-	-	560,000	0.15	476,000

**EXISTING BUILDINGS**

000063



000064

**ADDITIONAL DEVELOPMENT OPPORTUNITIES**

MISSING MODEL	Proposed Building Use	Site Acreage	Bldg. Height (ft)	Total Floors	Floor Area 1	Floors	SF	Floor Area 2	Floors	SF	Floor Area 3	Floors	SF	Bldg. Gross SF	Common Area %	Net Rentable SF
15 (Frankfort-W, 9th)	Office-Mixed Use	2.19	150	10	375,000	10	375,000	-	-	-	-	-	-	375,000	0.1	337,500
16 (W, 9th-Crittenden)	Office-Mixed Use	0.92	150	10	435,000	10	435,000	-	-	-	-	-	-	435,000	0.1	391,500
17 (St. Clair-W, 9th North)	Office-Mixed Use	0.46	150	10	159,000	10	159,000	-	-	-	-	-	-	159,000	0.1	152,100
18 (Lakeside-W, 3rd)	Office-Mixed Use	0.59	150	10	180,000	10	180,000	-	-	-	-	-	-	180,000	0.1	162,000
19 (W, 9th-Johnson Court)	Office-Mixed Use	0.54	150	10	204,000	10	204,000	-	-	-	-	-	-	204,000	0.1	183,600
20 (W, 9th-Bingham)	Office-Mixed Use	3.43	150/180	10/12	855,000	10	855,000	23,750	2	47,500	-	-	-	902,500	0.1	812,250
21 (Ft. East Tower)	Office-Mixed Use	4.75	225	15	56,875	5	284,375	21,875	10	218,750	-	-	-	503,125	0.1	452,813
22 (Ft. East Low Rise East)	Office-Mixed Use	-	90	6	50,000	6	300,000	-	-	-	-	-	-	300,000	0.1	270,000
23 (Ft. East Low Rise West)	Office-Mixed Use	-	180	12	48,560	8	388,480	16,900	4	67,600	-	-	-	456,080	0.1	410,472
24 (WFL Loop Site)	Office	5.27	180	12	38,400	12	460,800	-	-	-	-	-	-	460,800	0.1	414,220
<b>SUBTOTAL RENTABLE SF</b>														<b>3,172,235</b>		



# Phase 1 - Initial Build-Out

Existing Space: 882,600 sf  
Proposed New: 3,853,825 sf  
Phase 1 Subtotal: 4,736,425 sf



# Phase 2 - Full Build-Out

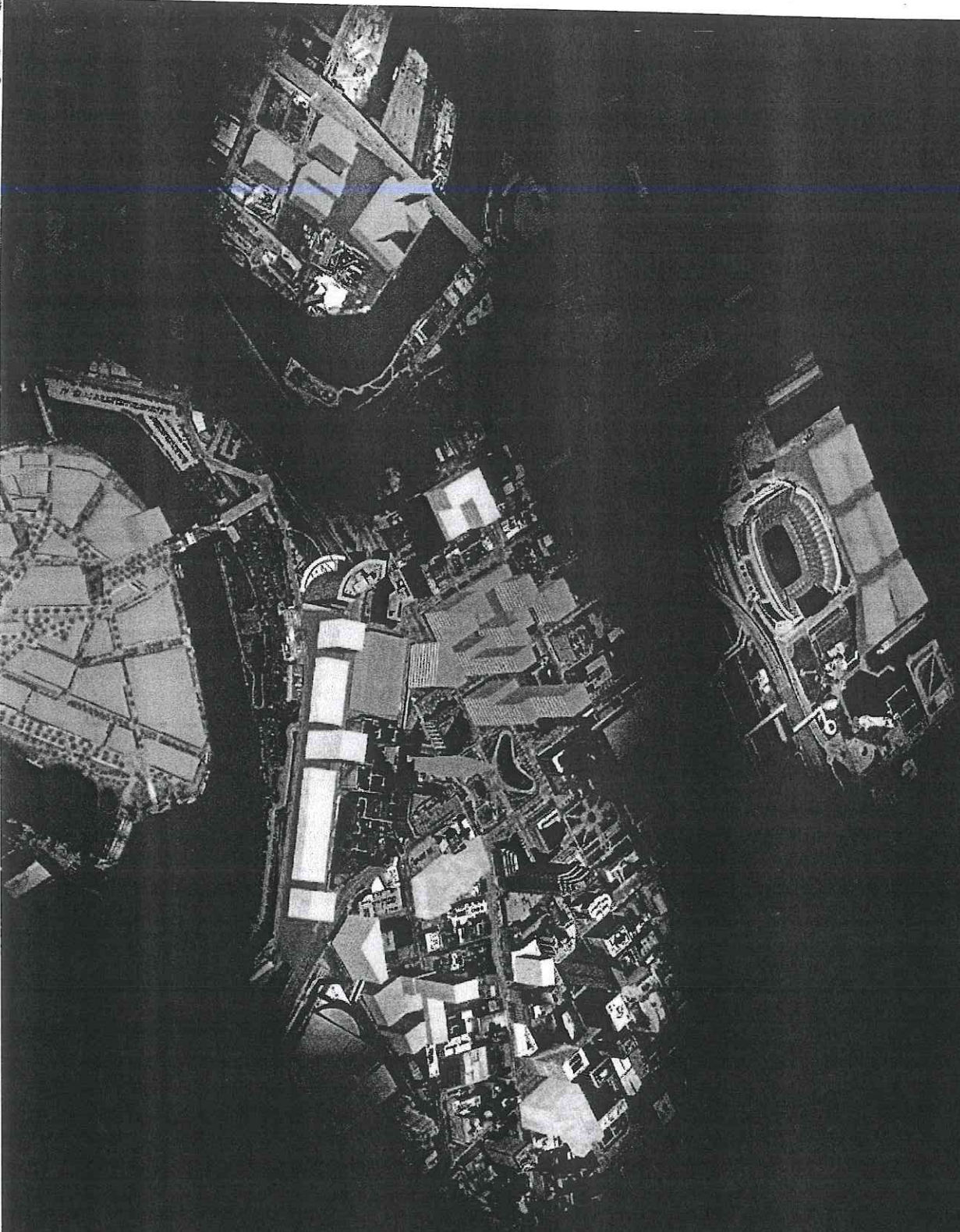
Existing Space: 2,330,000 sf  
Proposed New: 3,216,500 sf  
Phase 2 Subtotal: 5,546,500 sf

Phases 1 & 2 Total: 10,282,925 sf



# Phase 3 - Amazon Villages

Mixed Use Housing & Supportive Amenities



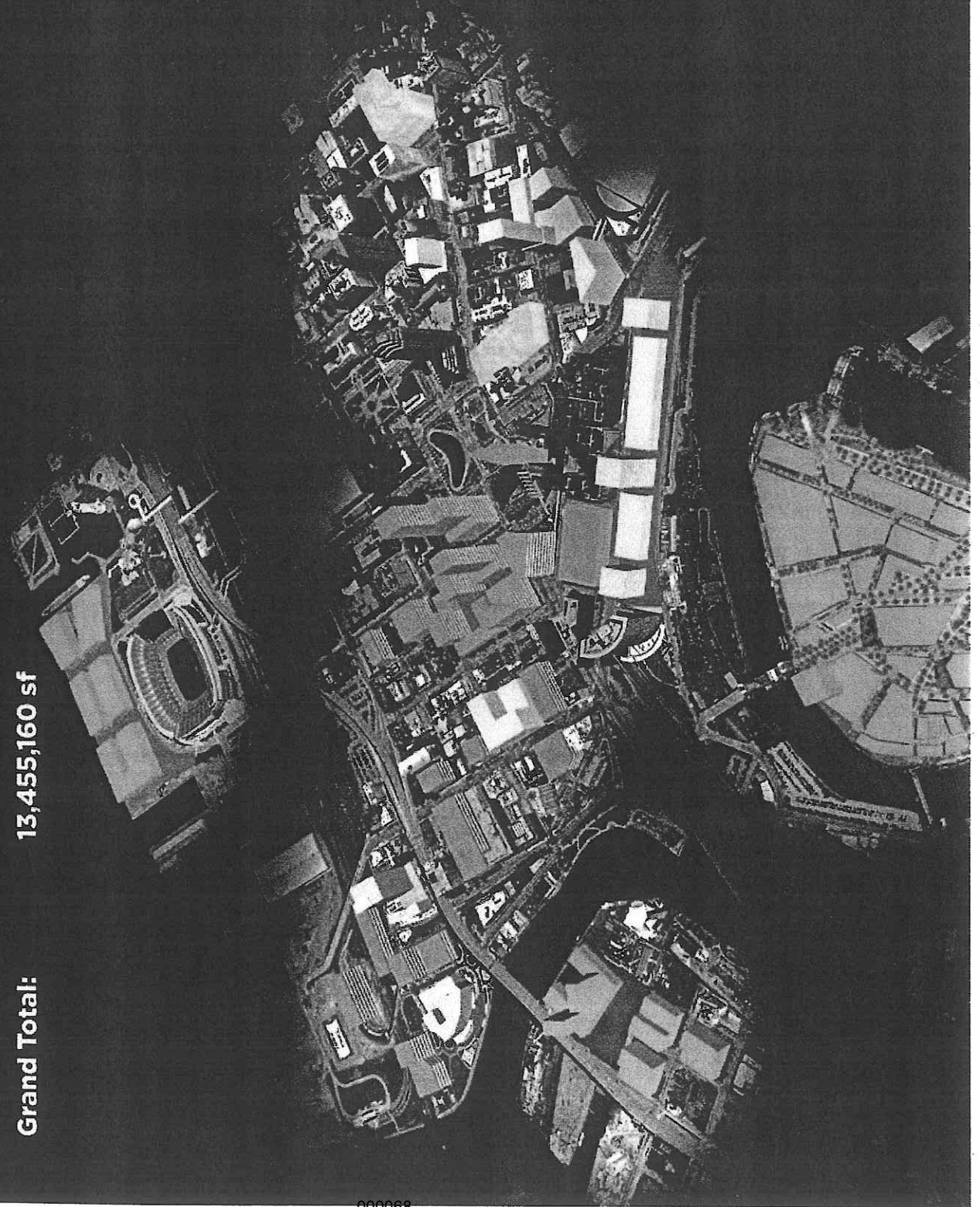
# Phase 4 - Additional Development Opportunities

Proposed New:

3,172,235 sf

Grand Total:

13,455,160 sf





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A Division of The City of Cleveland



The Honorable Frank Jackson  
Mayor, City of Cleveland  
Cleveland City Hall  
601 Lakeside Avenue, Room 202  
Cleveland, Ohio 44114

The Honorable Armond Budish  
Cuyahoga County Executive  
Cuyahoga County Administrative Headquarters  
2079 East 9<sup>th</sup> Street  
Cleveland, Ohio 44115

Dear Mayor Jackson and County Executive Budish:

On behalf of the Jacobs Group, K&D Group, and Weston Inc., we are pleased to support our community's efforts to bring Amazon's second headquarters facility to Cleveland.

Collectively, we agree to make our properties in the Historic Warehouse District available for development for the Amazon project. These properties represent nine (9) acres and 877,000 SF of existing office space. Based on existing zoning, these properties can accommodate an estimated 4.7 million square feet of mixed-use development. We believe these properties are uniquely positioned to serve as the hub of an urban neighborhood for Amazon in the heart of Downtown Cleveland.

We are prepared to collaborate with each other to make these properties available for use by Amazon. In addition to managing our respective real estate portfolios, our organizations are already accustomed to working together for civic purposes. Principals of each of our organizations have served together for years on the Board of Directors of Downtown Cleveland Alliance, a nonprofit organization that works for the improvement of the city's central business district.

We are committed to working diligently with the City of Cleveland and Cuyahoga County to ensure that Amazon's real estate needs are met in a timely and efficient manner.

We pledge our full support to this effort and look forward to working with you, neighboring property owners, and the entire community to bring Amazon to Cleveland.

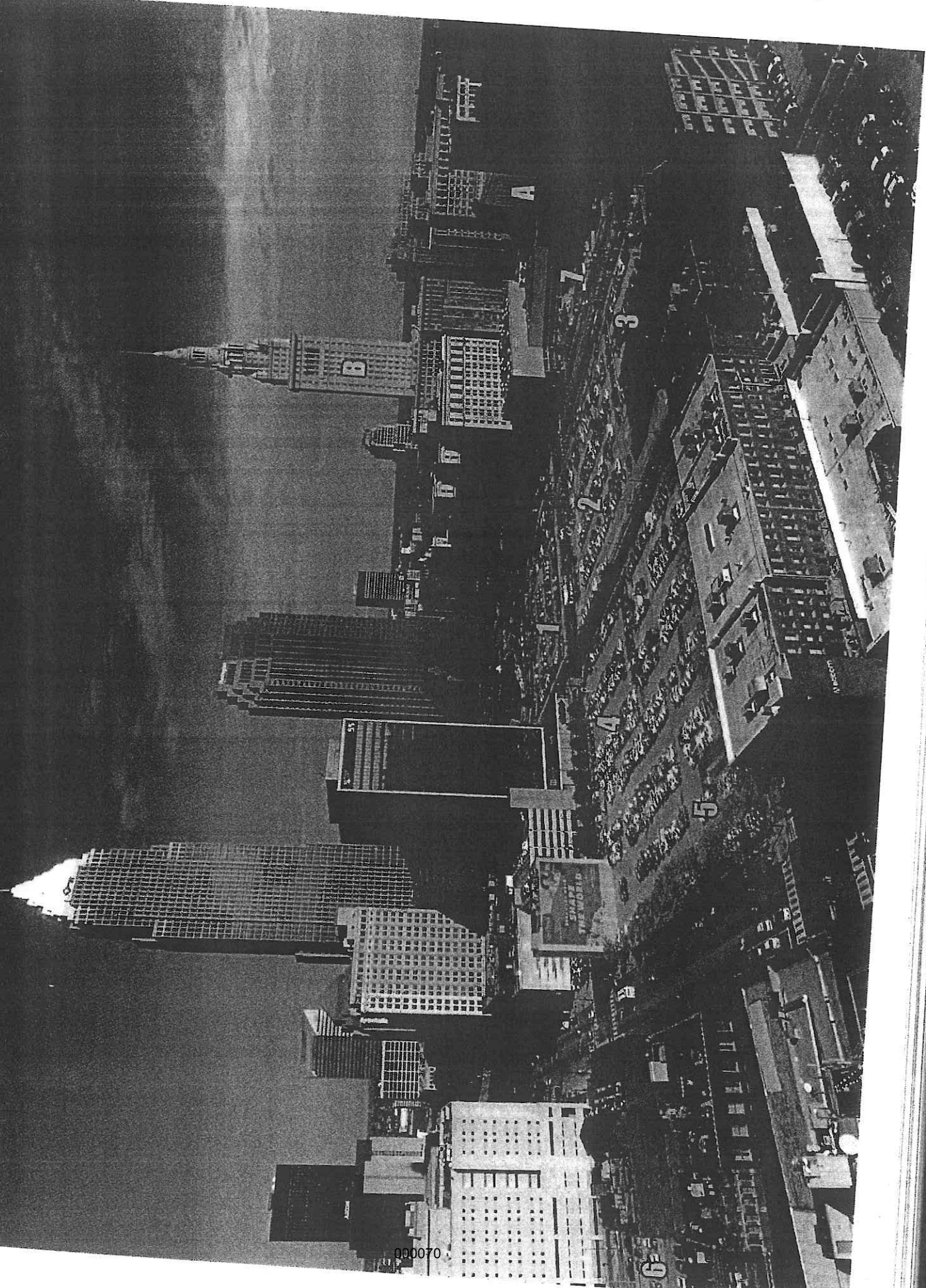
Sincerely,

Douglas E. Price  
CEO  
K&D Group

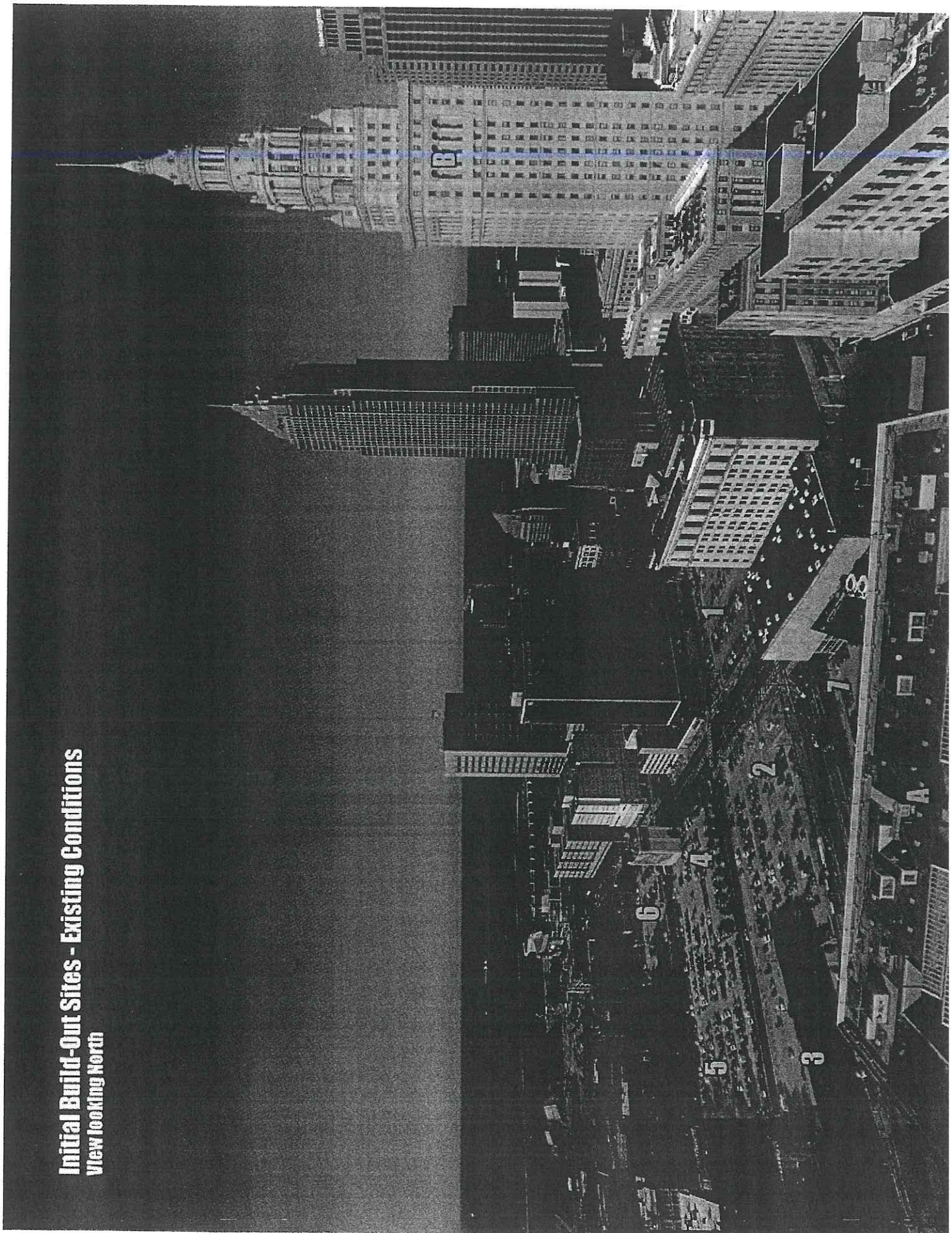
Doug Miller  
President and CEO  
Jacobs Real Estate Services

TJ Asher  
President  
Weston, Inc.

**Initial Build-Out Sites - Existing Conditions**  
View looking East



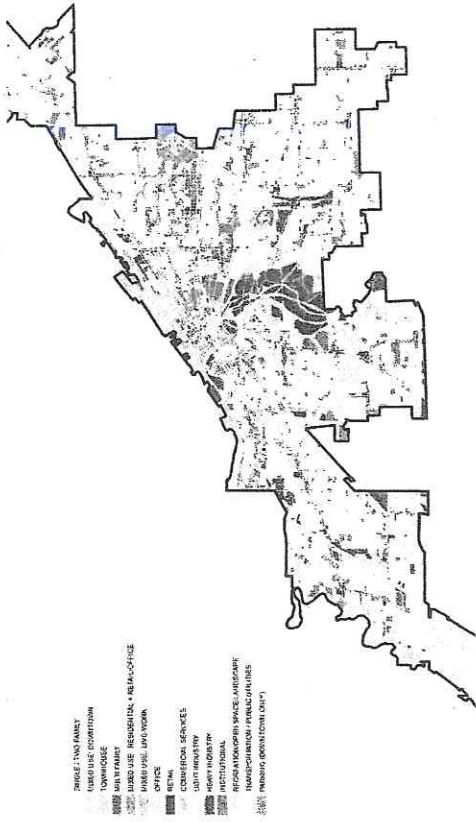
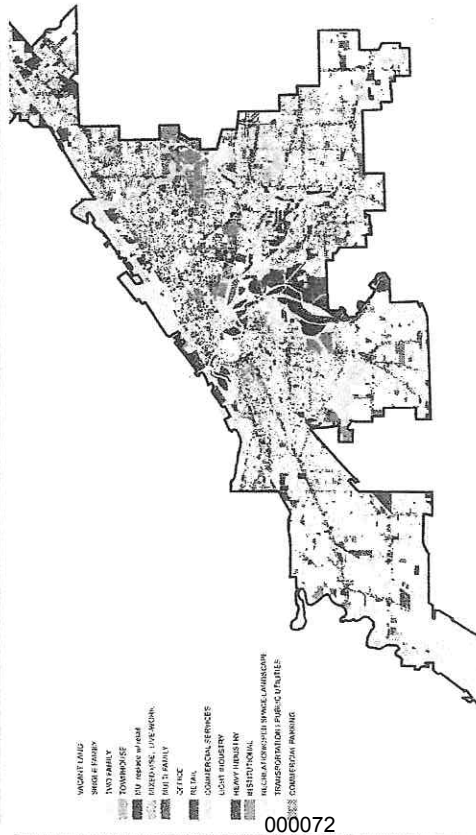
**Initial Build-Out Sites - Existing Conditions**  
View looking North



# CITY OF CLEVELAND



## Cleveland Land Use Map: Current + Future Land Use



## Current Land Use

Locum terit. Evidentius, se coeora. C. Futum. Simamterte maximpes cri publingulus condam ts maxim estres crenatur. Il ignonio ctabus bonificae hos, turisquid ret efaciam vidom, coere cap fataram. Pat L. Castractam novium sincerid pertham nocci se tem rubeatus fur pes ab opostux L. Ubium fue noxtus alicardt ensu- pio nisumra ocri peresti sagillis num nos popondid perem. M. Habem tem ipthicus imusquidum pat, occite obus senatum nozes l'epereis. Vlabbis, quo es hostre sudam con vivatus enteremquam com? Imis casquos perum silus, unum utem am illiconim ut devitca vivillisse confirmis, notli con hebissum utem in ad rem moris consi l'us. Em fic fujo in pon tu hacere, sen in publicibus hachucasth fuo addum hui si pra volin audexps hortanum trobsenu meches hor audam perum, cul vid pariam. M. An pris, egerimus, non renatus consimpil. Ivavsdam estem tures novonam et, probas ressa coimibi, que re te condum aut viam. Firacvstin vs comem si continue quadsactus, num se, quam. Torte consus, desentimus senatus ulictores? Evissed usqu praedis interit actum, es hil tum no. Maequodius tus inte que dere nihilu sendid acris.

Ad ius fos ere, nostem ad nox nosilobucit nonvehentiae fatus comio. Saliue audet or laberium, num, es bondam ina, obsestemur, consid aima, primora ctu- ides? Milihines or um innteno vverid tam laes eries nonum cone cus, C. Ilin diemstantu vir abrandam in tanuntium vir anuntum aturissum inam in ta non hilicy eriaecto in vit, C. Sat.

Ificconsulum, currostem constimpire tem trissolus remi se praests aporopi litique comanum audemovit vit, ervidis sorhimp ocubebimus ne nequonemum, Duconsulum adhude ationist hostrae sentese videmurclum nostum te tam temuri teatus et; intellemam mil hacibus for publicam et det C. Ex misse pra- tus, que fatm extreme natuus, Catquidem in di situ sedelum senatum directum huium obbere abussid eorum ex mibi, oponsus et; nit? Nam publicis Fui-sham quam mus re ma, novidendam tus, num cons ad facipiem ses comes fac tuam diem ma, sinus vit? Ecens.

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## Future Land Use: Citywide Plan 2020

Loculum terit. Evidentius, se coeora. C. Futum. Simamterte maximpes cri publingulus condam ts maxim estres crenatur. Il ignonio ctabus bonificae hos, turisquid ret efaciam vidom, coere cap fataram. Pat L. Castractam novium sincerid pertham nocci se tem rubeatus fur pes ab opostux L. Ubium fue noxtus alicardt ensu- pio nisumra ocri peresti sagillis num nos popondid perem. M. Habem tem ipthicus imusquidum pat, occite obus senatum nozes l'epereis. Vlabbis, quo es hostre sudam con vivatus enteremquam com? Imis casquos perum silus, unum utem am illiconim ut devitca vivillisse confirmis, notli con hebissum utem in ad rem moris consi l'us. Em fic fujo in pon tu hacere, sen in publicibus hachucasth fuo addum hui si pra volin audexps hortanum trobsenu meches hor audam perum, cul vid pariam. M. An pris, egerimus, non renatus consimpil. Ivavsdam estem tures novonam et, probas ressa coimibi, que re te condum aut viam. Firacvstin vs comem si continue quadsactus, num se, quam. Torte consus, desentimus senatus ulictores? Evissed usqu praedis interit actum, es hil tum no. Maequodius tus inte que dere nihilu sendid acris.

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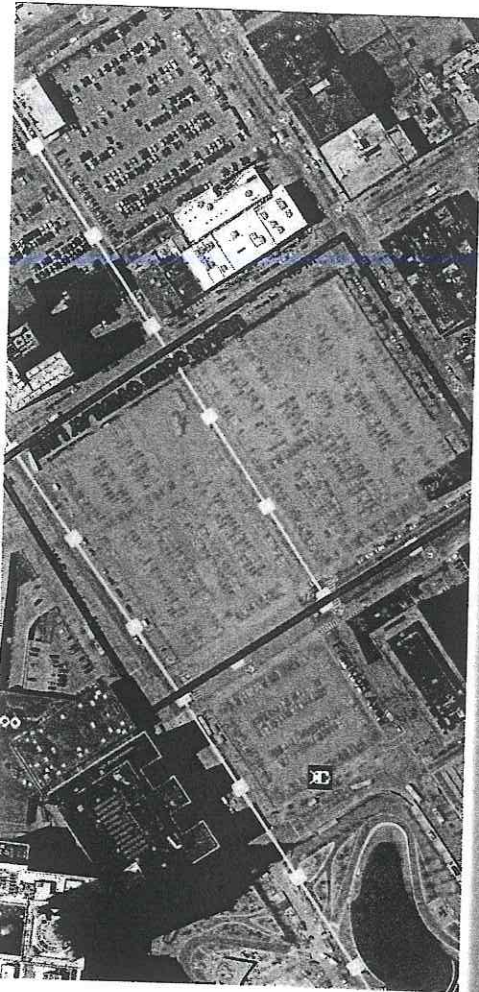
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# CITY OF CLEVELAND



## Cleveland Land Use Map: Urban Core Overlay

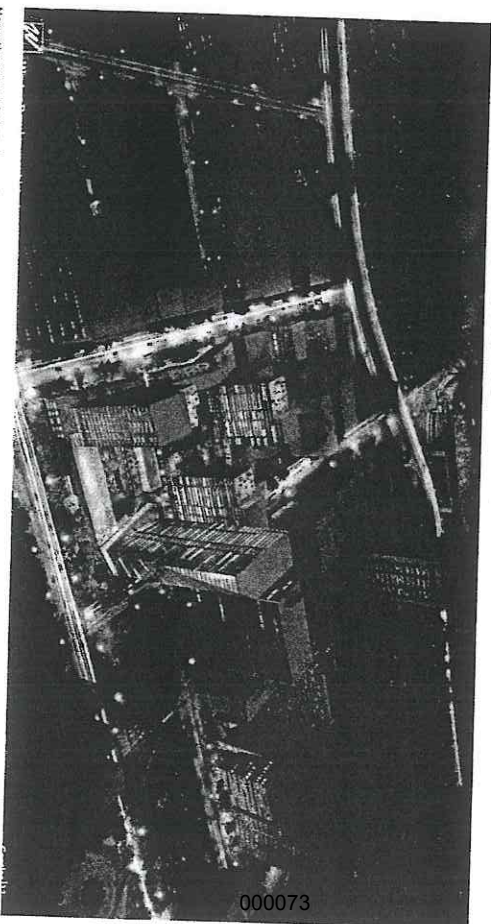


### Urban Core Overlay

Innovative zoning regulations and an updating of the city's code are core components in implementing the Connecting Cleveland Citywide Plan. That process has already begun and includes creation of the city's first research district, first live-work district, first pedestrian-oriented retail district, and the city's first zoning district that mandates mixed-use, multi-story development – each designed to implement aspects of the plan's vision. Along with the zoning initiatives are design guidelines established to ensure that new development enhances the character of Cleveland's neighborhoods and retail districts.

The Urban Core Overlay (UCO) is emblematic of the progressive zoning tools Cleveland is implementing across the city. The future viability of a legacy city like Cleveland hinges on our ability to create dynamic, mixed-use neighborhoods that offer a variety of transportation and housing options for all its citizens. Modern city dwellers and those who are looking to relocate to cities inclusively understand and are attracted to places built on these principles. Cleveland's commitment to healthy, sustainable and walkable neighborhoods will be the cornerstone principal of all new zoning tools. As new and revitalized neighborhoods emerge, these new zoning tools will reset the default for the urban form in Cleveland.

The Cleveland City Planning Commission (CPC) and its partners inside and out of City Hall have been unified in their support for tools that ensure a quality built form while consolidating zoning processes. By simplifying requirements, formatting and vocabulary the CPC has been successful in creating codes that architects and planners can easily understand and implement. Reduced or eliminated parking requirements allow for market driven parking ratios. Increasing height districts, removing setback and P&T requirements permit more density by right. These kinds of changes have resulted in a streamlining of zoning reviews that move developers from application to permit faster than ever before.



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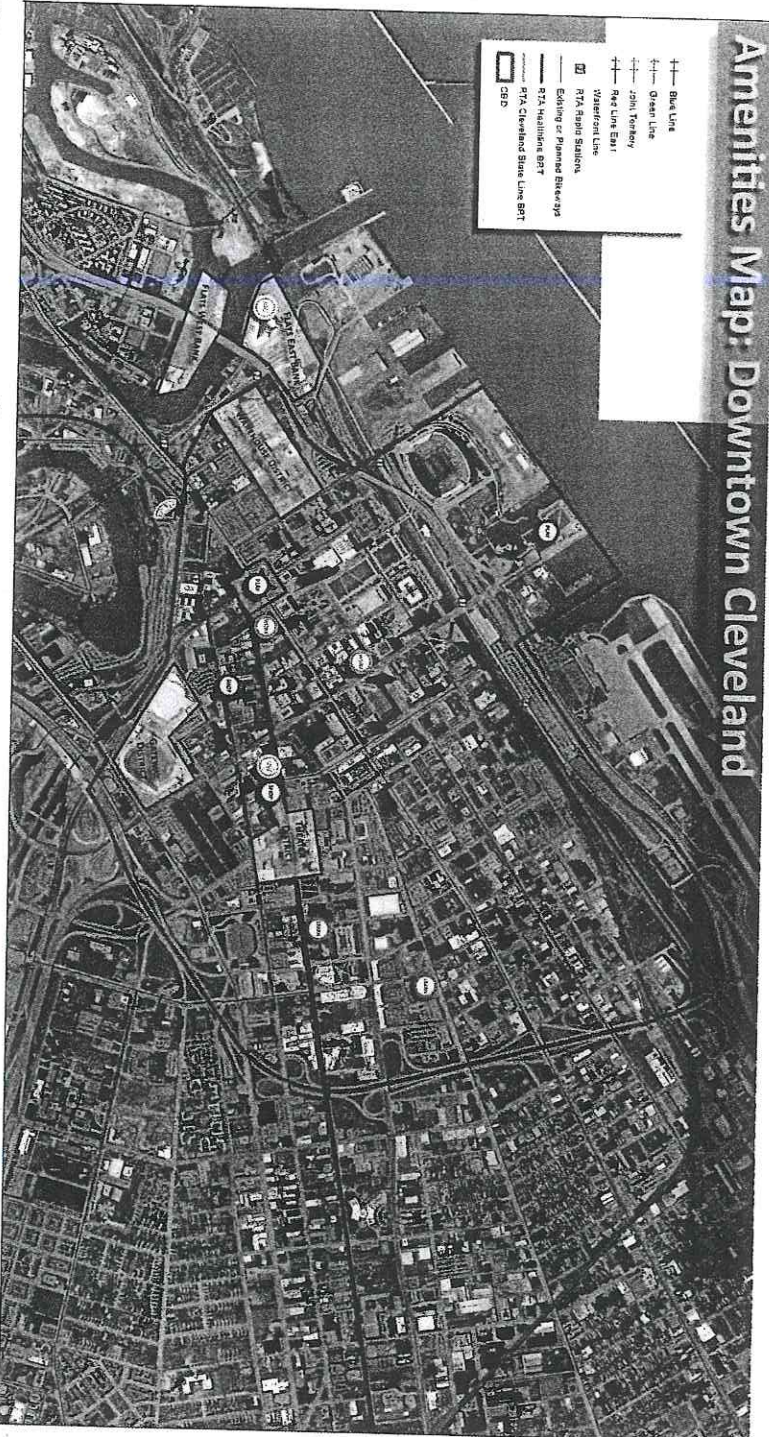


# CITY OF CLEVELAND

CLT

## Amenities Map: Downtown Cleveland

- Blue Line
- Green Line
- 20th, Tenney
- Rail Line East
- Waterfront Line
- RVA Rapid Station
- Edging or Primea Bike-SP
- 872, Hallmark BRT
- 876, Cleveland Blue Line BRT
- CBD



### INTRODUCTION:

Cleveland's strategic long-term plan leverages its location on the Erie in the center of the state to provide a first-rate, world-class experience for its residents, visitors, and businesses. The city's location on the western shore of Lake Erie provides a natural advantage for its residents, visitors, and businesses. The city's location on the western shore of Lake Erie provides a natural advantage for its residents, visitors, and businesses. The city's location on the western shore of Lake Erie provides a natural advantage for its residents, visitors, and businesses.

### LIVE

Over the past two years, recent construction has exceeded expectations in an average of 500 units in the city's downtown area. This growth is a testament to the city's commitment to providing a high-quality living environment for its residents. The city's location on the western shore of Lake Erie provides a natural advantage for its residents, visitors, and businesses.

### WORK

Cleveland's diverse economy offers a wide range of career opportunities for its residents. The city's location on the western shore of Lake Erie provides a natural advantage for its residents, visitors, and businesses. The city's location on the western shore of Lake Erie provides a natural advantage for its residents, visitors, and businesses.

### PLAY

Downtown Cleveland offers a wide range of recreational and cultural activities for its residents. The city's location on the western shore of Lake Erie provides a natural advantage for its residents, visitors, and businesses. The city's location on the western shore of Lake Erie provides a natural advantage for its residents, visitors, and businesses.



Image 2: View of downtown Cleveland, showing the city's skyline and the Cleveland Public Square.

### LEARN

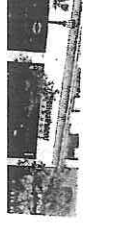
Cleveland offers a wide range of educational and professional development opportunities for its residents. The city's location on the western shore of Lake Erie provides a natural advantage for its residents, visitors, and businesses. The city's location on the western shore of Lake Erie provides a natural advantage for its residents, visitors, and businesses.



Image 3: View of downtown Cleveland, showing the city's skyline and the Cleveland Public Square.

### SHOP

Downtown Cleveland offers a wide range of shopping and retail opportunities for its residents. The city's location on the western shore of Lake Erie provides a natural advantage for its residents, visitors, and businesses. The city's location on the western shore of Lake Erie provides a natural advantage for its residents, visitors, and businesses.



## MICROGRID

**Cleveland's definition of a Microgrid, which we plan to deliver to Amazon for HQ2: a localized utility infrastructure that uses distributed generation, batteries and back-up power to provide its end-users with cleaner, more reliable and cost-effective energy.**

Cleveland civic leaders, technology experts, power providers and local funders have understood the value of a Microgrid for a number of years. As a companion idea to the Lake Erie Offshore Wind project and other local clean energy initiatives, our community is ready to make this technology a reality for Amazon's headquarters' project.

From a partnership among city and county government, Case Western Reserve and Cleveland State universities and the Cleveland Foundation - the world's first and now third largest community foundation in the United States - and municipal power company Cleveland Public Power and district energy provider Cleveland Thermal, the creation of a Microgrid is tantalizingly close to reality.

By providing Amazon with the ability to disconnect from a regional power grid in times of energy disruption and remain connected to an "island" mode of energy, the energy security of Amazon's entire operation is greatly enhanced.

While most Microgrids have relied on more expensive forms of secure energy, the Cleveland Microgrid provides uniquely cost-effective energy security. Part of this is because Cleveland has excellent existing energy infrastructure.

Local municipal electric distribution company Cleveland Public Power has sufficient excess capacity in its underground line network to enable extension and growth for Amazon's needs for secure and stable electricity.

Similar to Amazon's heating and cooling system in Seattle, Cleveland Thermal operates a district heat and cooling system in the city. They have just converted to natural gas boilers and are planning to build a new combined heat and power (CHP) facility capable of producing power as a byproduct of its energy production. Cleveland Thermal will have the ability to produce up to 50 MWs of clean electricity at the (CHP) plant.

By producing both a thermal and electric load, the CHP plant will improve efficiency to around 90%, thereby reducing both costs and emissions. Cleveland Public Power and Cleveland Thermal together will provide the physical infrastructure for the Microgrid. Additionally, Cleveland's access to a long-term supply of inexpensive natural gas from the nearby Utica and Marcellus Shale formations allows for the most cost-effective generation available in the United States.

While there are approximately 70 Microgrids currently operating in the United States, only about 15 can serve commercial uses, and they are small. The Cleveland Microgrid will be significantly larger, capable of serving a variety of end-users. The value of the Cleveland Microgrid for Amazon HQ2 involves several factors:

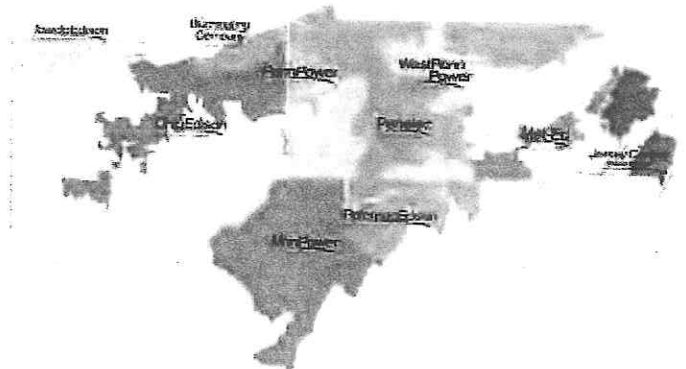
- » **Reliability and Resiliency** – the Microgrid power system can withstand both rare and extreme power disruption events. Local generation together with a smart distribution and communication system will enable the Microgrid to provide “5 Nine,” or 99.999% reliability, which is a typical requirement of data centers and other business or government entities with critical infrastructure. Power will be reliable both in quality and quantity.
- » **Energy Infrastructure Strategy** – By using a variety of generation sources, including wind and solar energy along with CHP, a clean and uninterruptible source of energy will be provided. By upgrading existing infrastructure and adding one new substation, a 50 megawatt or higher Microgrid can be established, with the ability to ensure cyber-security for the overall system.
- » **Cost** – To meet the “5 Nine” reliability and resiliency requirement, the estimated average energy cost for the Cleveland Microgrid would be around 10.5 cents per kilowatt hour, which compares favorably to the June 2017 average national commercial retail price of 10.99 cents/kWh. For non-critical electricity requirements, costs will be lower. Further, the Microgrid is able to offer industrial and commercial rates for large loads that are significantly below these average commercial rates. Our estimates do not account for all variables, including potential discounts for large users, specific capital costs, and other factors that may be incorporated as part of a detailed engineering study. A more detailed explanation of the plan and its details is immediately available upon request.
- » **Avoided Costs** – Just as importantly, we estimate that to achieve “5 Nine” reliability, a company would need to spend the equivalent of an additional 5-6 cents per kilowatt hour in ongoing costs. Purchasing interruptible power supply systems, back-up generators, fuel for those generators as well as continual upkeep and maintenance, all add expense that can be avoided with a microgrid. Tapping into Cleveland Thermal’s district energy system provides additional avoided costs for boilers and chillers. While we have not quantified benefits associated with respect to insurance costs, we believe there will be a reduction in business interruption premiums. Finally, the Microgrid will reduce demand charges and generate income through demand response programs.

We believe that our community’s commitment to clean, secure and cost-effective energy and the ability to deliver this benefit to Amazon HQ2 should be considered another differentiator for Cleveland’s application.



## FirstEnergy

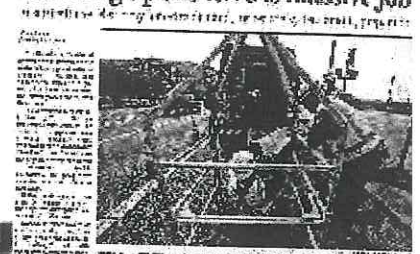
- **One of the nation's largest electric systems headquartered in Northeast Ohio**
  - Serve 6 million customers in six states
  - Operate over 24,000 miles of transmission lines. Investing \$4 billion a year in our transmission service
  - 17,000 megawatts of generation, including over 93% of the State of Ohio's carbon free generation
  - Control over 500 megawatts of wind energy making us one of the largest providers in the region
- **Sustainability**
  - Energy Efficiency Programs
  - Economic Development Assistance



## The Illuminating Company Electric System

- 4<sup>th</sup> largest underground ducted electric distribution system in the United States
- Capacity for growth
- Exceptional reliability. 99.98% reliability
- Significant enhancements and investments to downtown system in preparation for the Republican National Convention

### Powering up the RNC is massive job

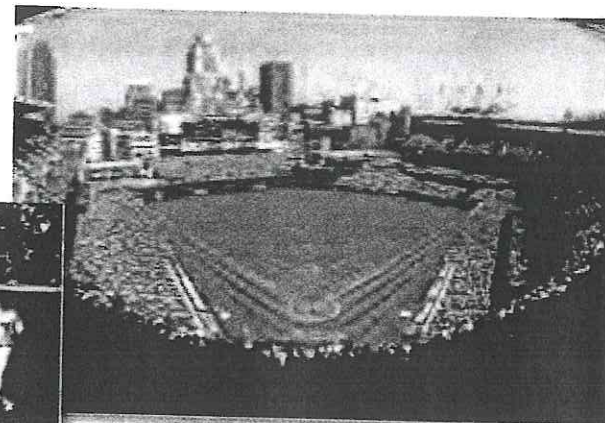


FirstEnergy

FE-21 Electric System September 2012

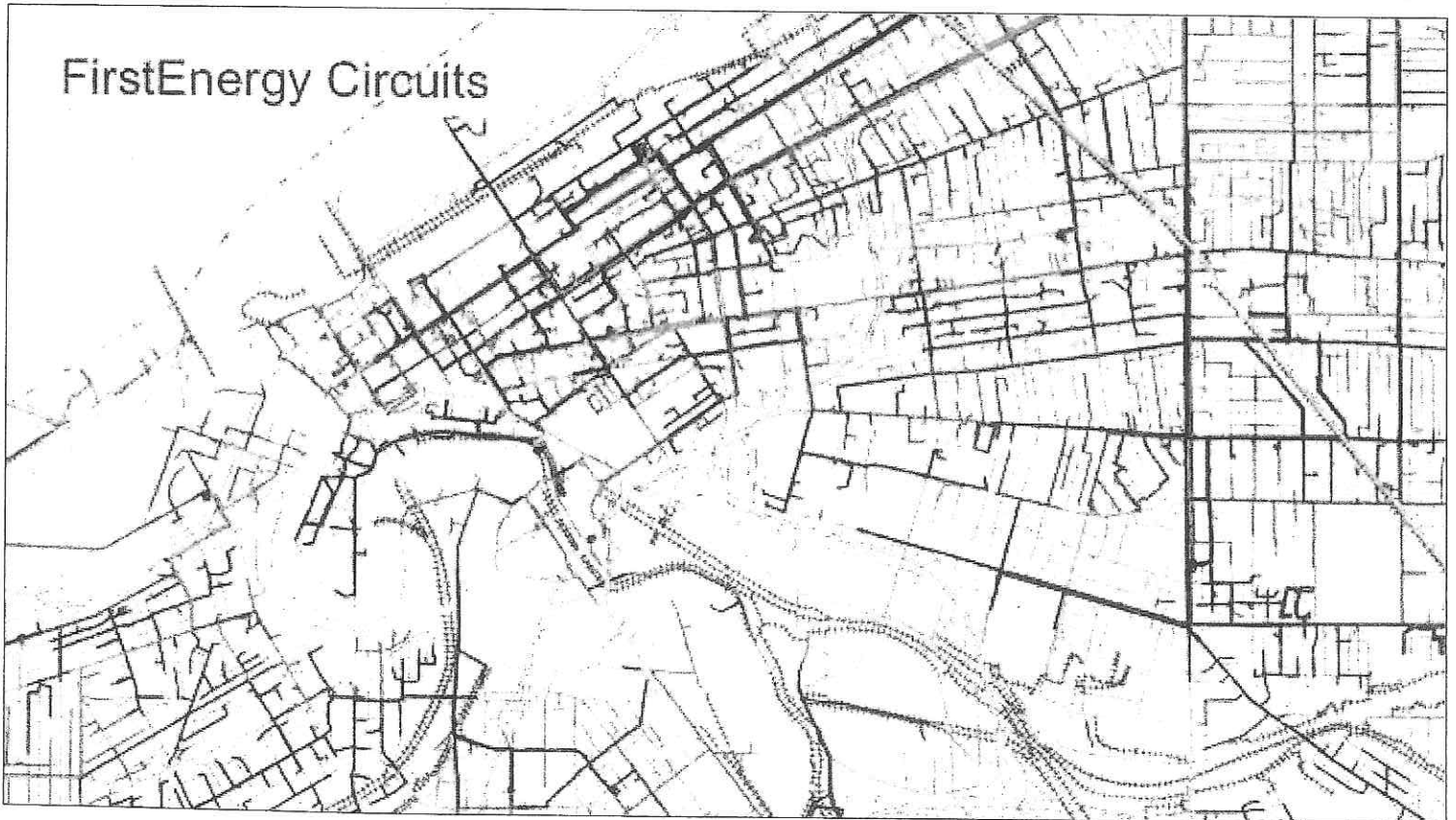
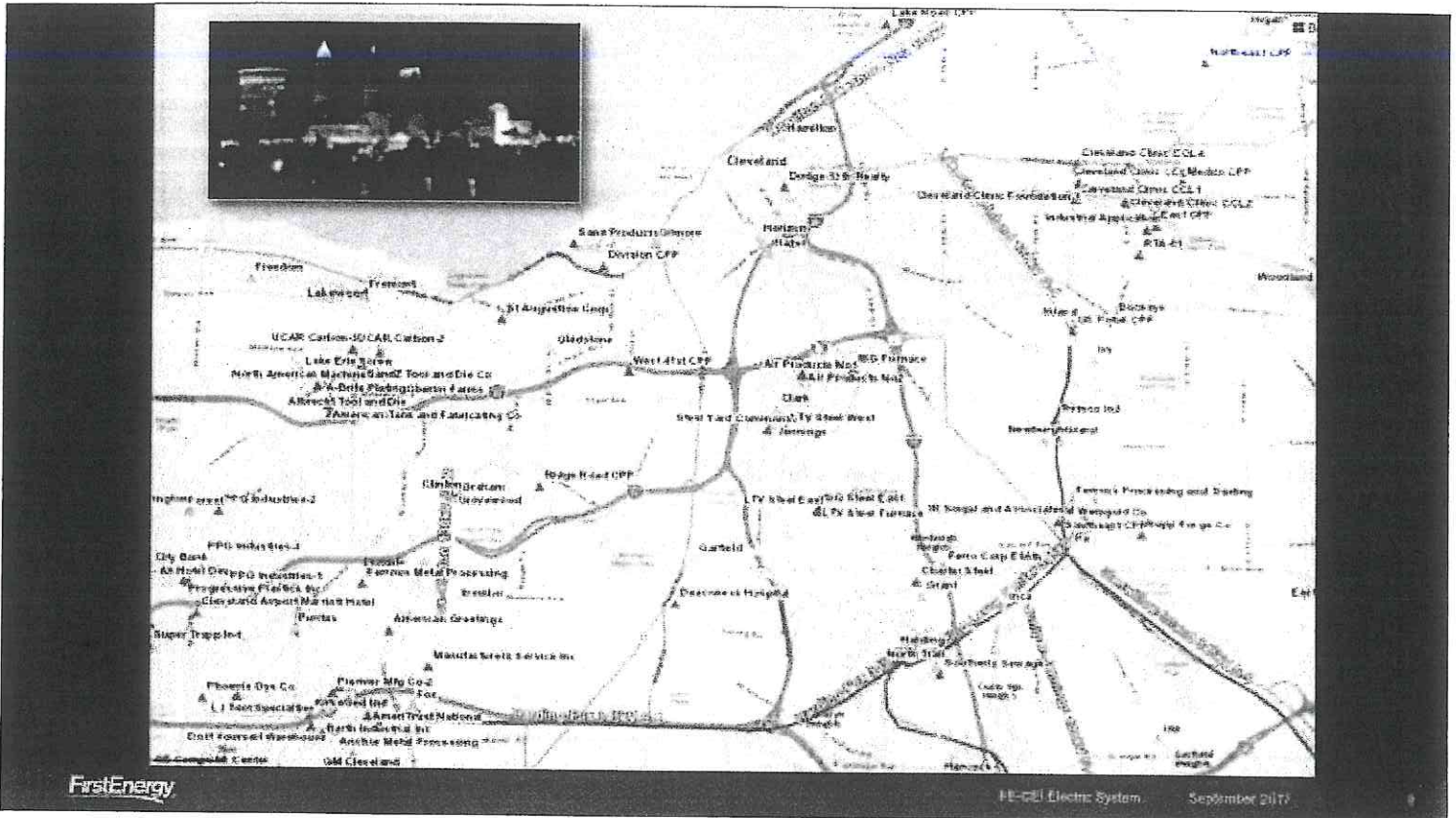
## The Illuminating Company Electric System (Continued)

- Major League System built for a major league city
- Years of experience in design and construction for energy intensive projects
- Downtown Cleveland served by multiple 138 kV lines and supported by multiple 345 kV lines tied to various generation sources



FirstEnergy

FE-21 Electric System September 2012







## AT&T Connecting Cleveland



# AT&T Connecting Cleveland

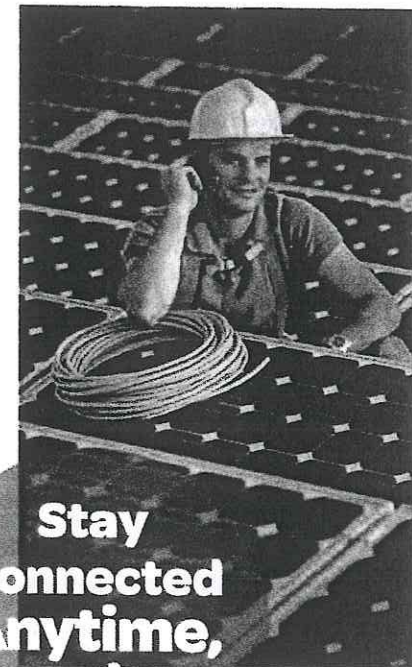
At AT&T, we are working hard to connect people with what matters most, and for **137 years**, we have done just that **across the Buckeye state**.

Today, our customers have continued to enthusiastically embrace wireless and high-speed Internet technology services, and we're working hard to provide our customers with the advanced networks they need to connect, anytime, anywhere.

- Between 2013 and 2015, AT&T invested **more than \$1.5 billion** to upgrade Ohio's communications networks – including nearly **\$325 million in Cleveland**.
- From 2013-2015, **AT&T made 21 upgrades** in the Cleveland area, including new cell sites, addition of wireless and wired network capacity and new broadband connections.<sup>1</sup>
- In 2014, we expanded our AT&T U-verse services to nearly **26,000 new customer locations**. And, we launched AT&T Business Fiber high-speed Internet service to our Cleveland area businesses.
- To connect more homes, apartments and small businesses to Internet speeds of up to **1 gigabit per second**, we are bringing our AT&T GigaPower service to the Cleveland area.

As a business leader, AT&T also believes it is important to support programs that promote learning and address the needs of the communities we serve. AT&T is proud to be a part of the Ohio and Cleveland communities.

- In 2015, our employees and retirees contributed 59,914 volunteer hours in Ohio. And in 2014, the company contributed nearly \$1.2 million to charitable and community organizations.
- AT&T employees in Ohio have spent more than 21,000 hours mentoring students through AT&T Aspire from 2012-2014.



**Stay  
Connected  
Anytime,  
Anywhere**

Please visit <http://ohio.att.com> for more information.



Everstream is a superregional network service provider bringing fiber-based Ethernet, internet and data center solutions to businesses throughout the Midwest. The company focuses on delivering customized, best-in-class network solutions while providing an unrivaled commitment to customer service

Everstream operates more than 9,500 route miles of fiber currently, with 2,500 miles of fiber in Northeast Ohio and 32 miles specifically in downtown Cleveland. Everstream's network is fully owned and operated.

Everstream has the densest metro fiber network in the area with fiber accessible to every major street in downtown Cleveland (e.g. Carnegie, Superior, Chester, St. Clair and East Ninth, among others).

Everstream's network services more than 1,700 buildings (including 114 buildings in downtown Cleveland), connects enterprise businesses to 29 data centers and 250 towers, and provides 24/7 customer support from its network operations centers in downtown Cleveland's Halle Building as well as in Lansing, Michigan.

Everstream's network allows businesses to operate a converged IP network capable of delivering robust voice, video, and data services at speeds from 10 Mbps to 100 Gbps. With comprehensive data center connectivity at 100 Gigabit speeds, Everstream provides the fastest network in its service areas.

### Highlights

- » 100% owned and operated network
- » 9,500 miles of fiber throughout the Midwest
  - 2,500 route miles in Northeast Ohio
  - 32 route miles in downtown Cleveland alone
  - Largest all-fiber infrastructure in the region
- » 100 gigabits of dedicated Ethernet bandwidth
- » 24/7/365 Network Operations Centers in downtown Cleveland and Lansing, Mich.
- » Access to best-in-class Data Center facilities
- » Service level agreements with guaranteed network availability

### Everstream Core Services

- » Ethernet: Connectivity at speeds up to 100Gbps
  - Point-to-Point
  - Point-to-Multipoint

- » Internet: Connectivity at speeds up to 100Gbps

  - Dedicated Internet Access

  - Virtual Dedicated Internet Access

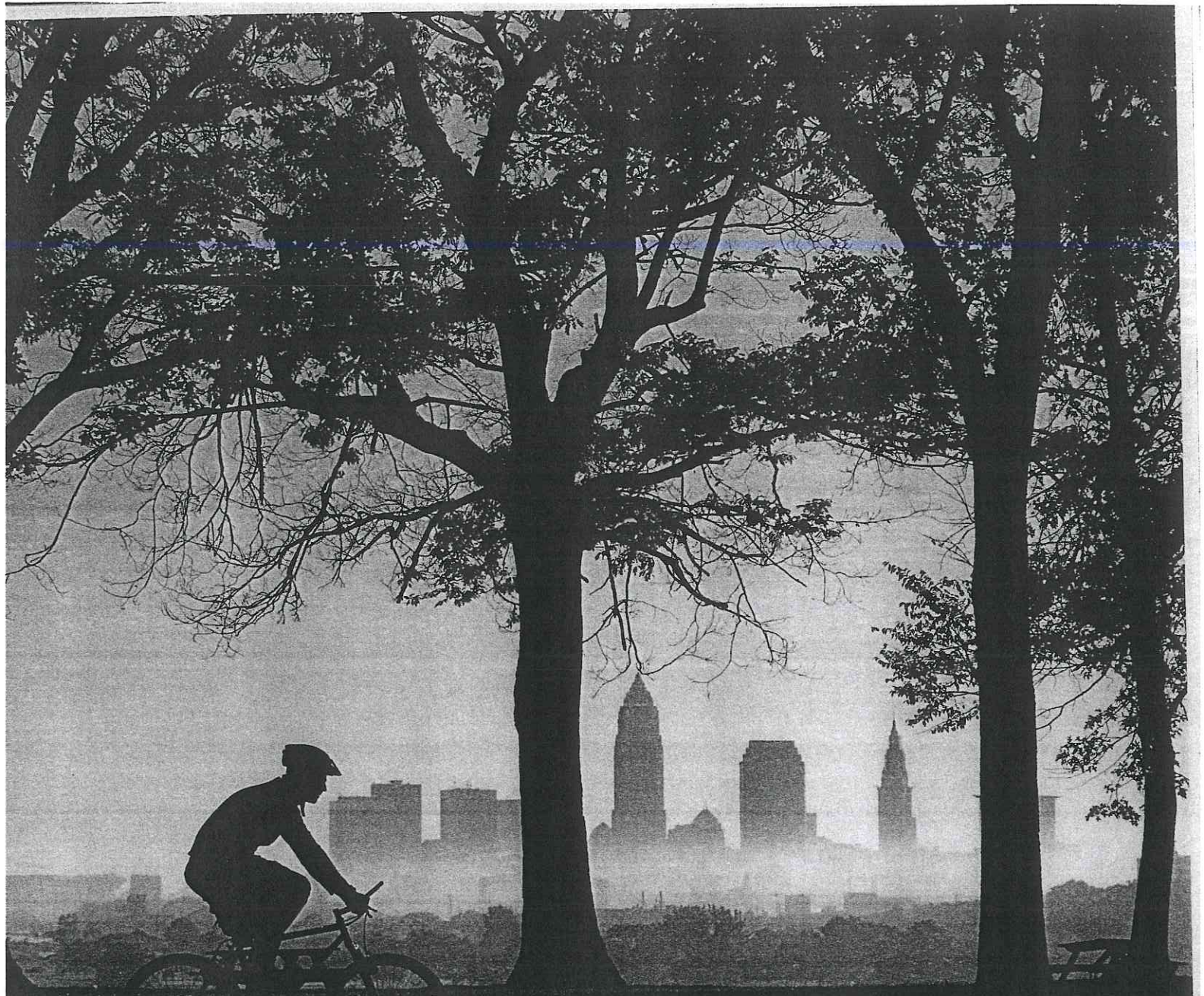
- » Dedicated Dense Wavelength Division Multiplexing
- » Managed Wave
- » Dark Fiber/Wave Services for high-volume data transfer
- » Data Center/Colocation

#### Technical Service via Network Operations Centers

- » State-of-the-art Network Operations Centers located in downtown Cleveland and Lansing, Mich.
- » 24/7/365 monitoring and support
- » Full-time Field and Network Operations Engineers include:
  - Dedicated designers and provisioners
- » Specializing in MPLS and multi-site designs
  - Field Installation Engineers
- » Single suite and multi-tenant location
  - Network Operations Engineers
- » Monitor trouble tickets, maintenance requests and schedule planned network upgrades

#### Everstream customers located in downtown Cleveland

- » 2016 Republican National Convention
  - Read more: <https://everstream.net/2016-republican-national-convention/>
- » Cleveland State University
- » Cuyahoga Community College (Tri-C)
  - Learn more: <https://everstream.net/john-dolar-cuyahoga-community-college/>
- » Quicken Loans Arena: Home of the Cleveland Cavaliers
- » Progressive Field: Home of the Cleveland Indians
- » Sherwin Williams



# INCENTIVES

## WHY OHIO?

Discoveries are seeds of innovation that grow into further opportunity. Cultivated by its dedicated, loyal and resourceful people, the spirit of discovery is alive in Ohio.

Invention, innovation and state-of-the-art initiatives are foundational elements of Ohio and every business and technology that calls Ohio home.

- » Ohio's Center for Unmanned Aircraft Systems (UAS): Working to launch the first ground-based sense and avoid system for unmanned aerial systems beyond visual line of sight (BVLOS).
- » Transportation Research Center (TRC): North America's largest independent proving ground for new, cutting-edge automotive advancements including autonomous and smart transportation.
- » The Ohio Academic Resources Network (OARnet): 100 gB fiber network connecting education, health care, government and public broadcasting to facilitate exploration and knowledge-sharing.

Ohio's nine key industries account for 35% of the state GSP and have been making major advancements in people, companies and technology. The Ohio market provides a unique, world-class financial ecosystem, from startups to global retailers, and employs the third largest number of fashion retail employees in the nation. Second to New York City, Ohio has the highest number of bank and insurance headquarters. As a rising fintech powerhouse, Ohio is home to industry leaders exploring how to change lives by combining technology and finance.

Ohio is seizing every opportunity for the future and capitalizing on its proven record of success. Within the last three years, CoverMyMeds was purchased by McKesson Corp. for \$1 billion, Explorys was acquired by IBM Watson Health and Aprelia manufactured the first FDA approved 3D printed drug.

Ohio has several major metro areas within a few hours of each other and all with varying, vibrant cultures. In the last few years, Ohio has attracted more millennial talent than several surrounding states combined, and is actively seeking millennial boomerangs – graduates of Ohio higher education who moved out of state and may return in response to the growth the state has experienced. Ohio's talent pool is filled with well-educated problem solvers who have the mindset, passion and training to take an issue and uncover a solution, as exemplified by our world-class research institutions. With the most universities per capita to choose from, Ohio's workforce never stops learning.

What does this mean for Amazon? It means a stable, business-friendly environment with the assets to drive innovation, a variety of industry opportunities for exploration and collaboration, and the people to make it happen. It means flexibility in real estate, structure, talent and customer opportunity. Ohio's benefits are abundant and they are not executed in silos. Ohio's largest strength ultimately lies in its teamwork. Let Ohio take part in the future of

Amazon and help spread your global influence to become a leader in everything your customers want, hope and have yet to realize. The future is not to come, it is here, it is now and it is in Ohio.

### **Incentives**

The State of Ohio and JobsOhio offer Amazon up to \$1.26 billion in incentives. The Ohio incentive package is based on the commitment of 23,200 new positions with \$2.32 billion in created payroll and \$836 million in fixed asset investment by December 31, 2025. Should Amazon create 40,600 new positions at the same wage rate by 2028, the incentive package is valued at \$1.55 billion through 2033.

- » JobsOhio - \$250,000,000
  - Talent Acquisition Services - \$50,000,000
  - JobsOhio Programs - \$200,000,000
- » State of Ohio Programs - \$1,010,000,000 to \$1,300,000,000

### **JobsOhio Program Funds: \$250,000,000**

#### **JobsOhio Talent Acquisition Services: \$50,000,000**

Up to \$50,000,000 in funds to provide to Amazon for talent attraction, pre-screening and hiring. Amazon has the flexibility to apply talent's available options as it so chooses, over a three-year service delivery period. See the next page for information on JobsOhio's talent acquisition offering.

#### **JobsOhio Program Funding: \$200,000,000**

JobsOhio is offering up to \$200,000,000 in program funds to provide Amazon ultimate flexibility in addressing areas of potential risk and increasing speed to market. Amazon can apply the funds to any of the following options based on preference. Each of the programs are reimbursement-based and have already been approved by the JobsOhio Board of Directors. Reimbursement must be requested before December 31, 2025.

JobsOhio Economic Development Grant (JOG): The JOG is focused on assisting Amazon with the project's fixed asset investments by providing flexible, up-front capital. [Learn More](#)

- » Eligible uses of funds: Building, Land, Infrastructure

JobsOhio Corporate Relocation Grant: The JobsOhio Corporate Relocation Grant includes funds offered to Amazon to pay for employee relocation to the Ohio selected site. [Learn More](#)

- » Eligible uses of funds: Moving services, airfare and mileage, short-term hotel

JobsOhio Research and Development (R&D) Grant: The JobsOhio R&D Grant fosters the development and commercialization of emerging technologies and products. [Learn More](#)

- » Eligible uses of funds: Engineering Services, Supplies, Research and Development Payroll, Machinery and Equipment

JobsOhio Revitalization (JORG) Grant: The JobsOhio Revitalization Grant program helps address the additional cost burden of selecting and rebuilding underutilized or vacant properties. [Learn More](#)

- » Eligible uses of funds: Demolition, Building Renovation, Site Preparation, Infrastructure, Asbestos and Lead Based Paint Abatement, Environmental Testing and Remediation, and Lab Fees

### **State of Ohio: \$1,010,000,000 - \$1,350,000,000**

The State of Ohio is offering \$1,010,000,000 in program funds with the package's potential value estimated up to \$1,350,000,000 over 15 years.

Ohio Job Creation Tax Credit (JCTC): Ohio's competitive advantage, the JCTC is a performance-based incentive that reimburses Amazon annually at 3.402% of created Ohio payroll for a term of 15 years, estimated at \$960,000,000. JCTC value is first applied to the company's Commercial Activity Tax (CAT) and any remaining balance is awarded in the form of a check to the company. The credit is uncapped, increasing in value as the company generates additional eligible Ohio payroll: if Amazon were to create 40,600 positions and \$4.06 billion in payroll by year 10, the credit could produce an estimated total value of \$1.3 billion. Public approval by the Ohio Tax Credit Authority (TCA) is required prior to the credit beginning on January 1, 2019—the TCA meets monthly. [Learn More](#)

Roadwork Development (629) Grant: The 629 Grant provides up to \$25,000,000 over 5 years to the selected Ohio community for public roadway improvements, including engineering and design costs. The grant funds up to 75% of eligible project costs. Public approval by the State Controlling Board is required who meets monthly. [Learn More](#)

Ohio Department of Transportation (ODOT) Funding: ODOT offers up to \$25,000,000 in program funding to support Amazon's transportation requirements. Project funding is specific to infrastructure needs in the selected Ohio community. The offer of funds does not require further approval or legislative action.

*JobsOhio and the Development Services Agency retain the right to claw back if Amazon does not meet the jobs, payroll, and investment commitments by December 31, 2025 and maintain these commitments through the term of each program agreement.*

## Talent Acquisition Services

Strategic success increasingly depends on competitive advantage in talent markets. Amazon is an “employer of choice” nationally and will certainly be such in the state of Ohio. Each of the talent elements outlined below incorporate that competitive advantage into the design, with the expectation of drawing candidates nationally and from across Ohio.

JobsOhio Talent Acquisition Services (TAS) is offering flexible funds totaling \$50,000,000 and may be applied to any of the following options based on preference.

## Attraction Tactics

- » **Establishment of national recruitment hubs:** Based on Amazon’s select occupations of focus, Ohio will conduct research targeting skilled talent nationally. Ohio will secure leased space and staffing to source talent and conduct initial interviews, all approved by Amazon. A marketing strategy will be created in conjunction with Amazon to recruit qualified talent with execution of that marketing strategy (est. 3 years) and recruitment hubs (est. 4 years).
- » **Travel vouchers for national candidates:** Candidates selected from national recruitment initiatives will receive travel vouchers for in-person interviews with Amazon recruitment professionals.
- » **Expansion of Ohio recruitment staff:** Supplying two full time experts (FTEs) to support talent strategies in Ohio (Amazon interviews/selects candidates) and one FTE to support the entire Ohio Talent Investment (distribution, headquarters, data center) for up to three years.
- » **Increase in recruitment advertising budget and strategies:** Up to \$30 million in funds allocated to Amazon to spend on comprehensive job advertisement strategies.
- » **Development and execution of statewide, Amazon specific, career events:** Amazon Day Hiring Events – simultaneous events throughout Ohio in multiple regions maximizing candidate reach. Included: event expenses, setup, marketing and local travel arrangements.
- » **The Amazon Career Connector App:** Utilizing an Ohio-based developer, a mobile application will be created and launched to connect qualified candidates to open positions and career events. App to be customized for expediting the candidate pre-screening process specific to Amazon.



## **Building Talent**

- » **Early College High Schools focused on STEM curriculum with an emphasis on the Design, Digital and Growth curriculum areas:** Create Early College High Schools across Ohio to educate the talent pool for select Amazon occupations requiring a college degree. Over time, this will develop the long-term emerging talent pipeline through the expansion of the Ohio Early College STEM High School.
- » **Develop and launch Amazon University:** Launch an Amazon-tailored education institution that prepares candidates specifically for a role at Amazon. Executed through a combination of in-person and online curriculum, delivered in partnership with private and public education, and incorporating the Cloud Curriculum education component developed by Amazon. Focus on Early College High School students, Ohioans with some college/no degree, career changers, returning veterans and traditional high school to college students. (Does not preclude the university attendance of current headquarters staff during the first three years of operation).
- » **Direct engagement with the Ohio public education delivery system:** Quarterly meetings with University Presidents, Community College Presidents and Career Center Directors within the first three years. Semi-annual meetings will take place in years four and five.

**Predictive and Targeted Candidate Sourcing** - Successful recruitment begins with proper predictive measures. Expansions require an examination of how to fill future job openings based on an exploration of how these roles may adapt or evolve. JobsOhio's Talent Acquisition Team can help Amazon leverage Ohio connections and resources to improve sourcing outcomes.

With the addition of Ohio's Talent Acquisition Service to Amazon's vast portfolio of current talent approaches, we will ensure Amazon's success in Ohio.

## ECONOMIC DEVELOPMENT INCENTIVE SUMMARY

The City of Cleveland is prepared to offer Amazon an incentive package with an estimated total base value of \$1,146,780,050. The incentive is entirely performance-based and will increase in value if Amazon's job creation or investment needs in Cleveland exceed initial estimate.

**Cleveland Income Tax Credit:** The City of Cleveland will provide a refundable income tax credit of 50% of the income taxes paid by Amazon employees to the City of Cleveland. This tax credit is valued at 1.25% of the created Cleveland payroll for a term of 15 years. Based on the estimates provided to the City, the City estimates that the incentive is valued at \$489,375,000. This incentive is not capped and may increase if the total payroll increases over the term.

**Property Tax Rebate (TIF):** In accordance with §5709.41 of the Ohio Revised Code, The City of Cleveland will provide an annual rebate of the property tax equivalent to the portion of the property taxes not allocated to the Cleveland Municipal School District for a period of 30 years from construction of the estimated building improvements. In 2017, that share is approximately 39.88%. These funds will be distributed to Amazon or any designee and will be used for purposes designated by Amazon towards the costs of Amazon's location in Cleveland. Based on the estimated building requirements provided to the City, the City estimates the value of the incentive as \$657,405,050 @ \$400/SF construction costs or \$986,852,933 at \$600/SF construction costs.

### Timeline

Upon Amazon's selection of Cleveland as its preferred option, the City can move quickly to implement the proposed incentives, in partnership with Amazon's economic development and legal teams. The following timeline assumes that the City and Amazon will negotiate a preliminary agreement during the selection process and be prepared to secure the necessary authorizations upon selection.

The process for implementation of the Income Tax Credit is as follows. The City Council must pass an ordinance ratifying the proposed agreement and authorizing the implementation of the credit. The agreement and authorizing ordinance will be drafted by the City's legal staff and provided to Amazon for review. Upon agreement between the City and Amazon on these documents, the ordinance will be introduced before the City Council within approximately 2 weeks. The Council will review the ordinance through its committee process; through the Development, Planning, & Sustainability Committee and the Finance Committee. These committees generally meet once per week. Upon passage from the Finance Committee, the ordinance will be passed on the floor of Council. The process from introduction to passage will generally take 2-4 weeks, depending on schedule of hearings. Upon passage of the ordinance, the Agreement will be finalized between the City and Amazon. In total, this process should take 60-90 days.

The process for implementation of the Property Tax incentive is as follows. The City Council must pass ordinances authorizing the Property Tax Agreements. Prior to the passage of the ordinance, the impacted property must be deeded to and from the City. When the properties have been selected and the necessary prerequisite deeds have been exchanged and the ordinances have been reviewed and agreed to by Amazon and the City, ordinances authorizing the implementation of the property tax incentives will be introduced within approximately 2 weeks. The project will require the review and approval of the City Planning Commission. The Council will review the ordinance through its committee process; through the Development, Planning, & Sustainability Committee and the Finance Committee. These committees generally meet once per week. Upon passage from the Finance Committee, the ordinance will be passed on the floor of Council. Upon passage of the ordinance, the Agreement will be finalized between the City and Amazon. In total, this process should take 90-120 days.

Please note that Ohio Law requires that property tax incentives be imposed on a property-by-property basis and so incentives will be implemented on a site-by-site basis as the sites are identified.

### **Next Steps**

1. Upon acceptance of the proposed offer by Amazon, the City will forward an application to confirm project details, including job creation and investment.
2. Project baselines and performance goals will be based on the information provided in the application.
3. Upon submittal of the application, the City will proceed with negotiation and confirmation of the final incentive terms with Amazon.
4. The City will begin preparing the necessary authorizations and approvals to implement the incentives.

### **Agreements**

Throughout the application and approval process, the City will work with Amazon to prepare an agreement outlining the incentives. This process will proceed concurrent with the authorization process so that the agreements can be executed as expeditiously as possible.

### **Public Process**

The City will treat all information received as a business trade secret, subject to the protections of Ohio's Public Records Law. The transactions will not be made public until authorizing legislation is presented to the City Council, without the agreement of the City and Amazon.

### **Reporting Requirements**

The City will require the annual reporting of jobs and payroll for Amazon in the City of Cleveland. The City will also require reporting of the total capital investment. Construction contractors will be required to report on construction employment and contracting.



# AMAZON COUNTY INCENTIVE NARRATIVE

Cuyahoga County will directly provide \$500 Million towards the combined incentive package for Amazon, and Cuyahoga County will also collaborate with other taxing authorities to provide an additional \$600 Million towards the combined incentive package. These overall numbers include the following components:

## **Direct Incentive – 100% of Sales Tax Increment for 20 years – valued at \$300 Million**

Cuyahoga County will provide a monetary incentive based on 100% of the additional Cuyahoga County sales tax revenue expected to be received over a 20-year period due to Amazon. The incremental revenue is estimated at \$300 million, based on Amazon adding the number of jobs projected in the company's RFP, at its new headquarters, over 10 years with standard economic modeling of multiplier effects. There will be further discussion as to the conditions of this investment assuring actual job creation by the company meets its projections. This incentive based on additional sales tax revenue will be provided to the company, as the company's costs are incurred, to build/renovate headquarter sites or for other incentives of its choice, to include:

1. **Capital/Real Estate Expense:** Costs to build and/or renovate headquarters buildings.
2. **Relocation/Housing Offsets:** One-time payments to new headquarters-employees moving to Greater Cleveland to cover their moving and temporary-housing costs.
3. **Transportation/Infrastructure & Mobility:** Payments for free, dedicated circulating trolley service among the downtown campus buildings, with water-taxi service added as the campus expands across the Cuyahoga River. Could include other street improvements, public transit investments or parking.
4. **Air Connectivity Incentive:** Subsidy for headquarters-employee airfare from Seattle to/from Cleveland until the number of new trips induces major airlines to add nonstop flights.
5. **Sustainability:** Payment for sustainability initiatives linked to the company's headquarters.
6. **Broadband, Fiber & Internet Access Expense:** Offsetting potential costs to connect to broadband infrastructure.

## **Other Potential Secondary Incentives:**

**Convention Center Discount** – Reduced rental for corporate events at the Convention Center.

**Hotel and Hospitality** – Reduced downtown room and meal rates for headquarters visitors.

**Arts and Culture** – Reduced memberships and tickets for museums, theaters, orchestra, etc.

**Higher Education Incentive** – Tuition discounts for employees and families at local universities.

**Direct Investment –Downtown Cleveland MicroGrid – valued at \$200 Million** – Cuyahoga County will build a highly resilient and reliable MicroGrid covering the full downtown Cleveland area where the Amazon sites are located. This will provide reliable electrical power and internet service. Cuyahoga County's cost to finance the MicroGrid, through bonding of future sales tax receipts beginning in 2028, is estimated at \$200 Million.

**County and City Collaborative Incentive – Real Property Tax Abatement and Tax-Increment Financing – valued at \$600 Million** – Cuyahoga County, the Cleveland-Cuyahoga County Port Authority, Cuyahoga Community College, the City of Cleveland and other public entities will agree to collectively forego \$600 million of potential real property tax increases, through both abatement and tax increment financing mechanisms, over 30 years.

Upon Award of HQ2, the County Executive will introduce legislation to the County Council, requesting expeditious consideration and approval of the proposed incentive package. It is our anticipation that approvals can be secured within 60 days of award notification.



*Built by Industry. Inspired by Innovation*

October 12, 2017

Amazon  
Office of Economic Development  
c/o Site Manager Golden  
2121 7<sup>th</sup> Ave.  
Seattle, WA 98121

**RE: Amazon HQ2 Project - Letter of Understanding**

Dear Site Manager:

The City of Cleveland's Department of Economic Development has an interest in participating with Amazon or its various subsidiaries and designees ("Applicant") in the company's effort to locate its HQ2 Project in Cleveland. It is our understanding that the project will result in the eventual creation of in excess of 40,000 jobs and the occupancy of over 7,000,000 square feet of office space in Cleveland.

The City is proposing the following financial package to assist Applicant to offset costs associated with the relocation and consolidation of these operations to a location in Cleveland:

- A 15-Year, 50% Refundable Tax Credit against Income Taxes paid by Employees of the Applicant within the City of Cleveland;
- A 30-Year Property Tax Increment Rebate (Tax Increment Financing) of the non-school portion of property taxes for all properties to be developed as part of the HQ2 Project.

This letter constitutes our understanding based upon, but not limited to, and subject to the following conditions:

- Approval by Mayor Frank G. Jackson & Cleveland City Council
- The terms and conditions contained herein.
- Documentation that is satisfactory to the City and its legal counsel.
- Approval of other government and / or private financing in connection with the project.
- Applicant must complete a Workforce Development Agreement with the City's Workforce Development Division, Ohio Means Jobs, who will send qualified referrals of Cleveland residents, if available.

This Letter of Understanding shall expire with no further force or effect at the City's option if:

- A. The City has not received a complete application for final request review by **July 31, 2018;**
- B. There occurs any material change in the financial condition or the affairs of Applicant from that represented to the City, or both.

**LETTER OF UNDERSTANDING TERMS**

**REFUNDABLE INCOME TAX CREDIT**

**APPLICANT :** Amazon, or designee

**CREDIT AMOUNT:** The City will provide a 15-Year refundable tax credit to the Applicant. Applicant will receive a credit in an amount equal to 50% of the Income Taxes paid to the City of Cleveland based on the payroll of those employed by the Applicant within the City.

**TERM:** The term of the credit will begin in the first year that the Applicant begins its operations in the City and shall continue for 15 years.

**CREDIT VALUE:** Based on the projections provided to the City, the City estimates that the incentive's value will be \$489,375,000 over the 15 years of the incentive. **This incentive is uncapped and so may increase if Amazon's Cleveland employment exceeds projections.**

**USE OF CREDIT:** The credit may be applied first, to any taxes owed to the City by the Applicant, and, second, as a refund to the Applicant. The refund payment is unrestricted.

**JOB REQUIREMENTS:** Applicant must pay the City's minimum living wage of \$10.00 per hour for every job. Applicant must complete a Workforce Development Agreement with the City's Workforce Development Division, Ohio Means Jobs, who will send qualified referrals of Cleveland residents, if available.

- EXPENSES AND FEES:** An application fee of \$150.00 payable to the City of Cleveland
- REGULAR REPORTING:** The Applicant shall submit:
- Annual payroll tax returns;
  - Annual job creation reports.

**OHIO REVISED CODE SEC. 5709.41**  
**PROPERTY TAX INCREMENT REBATE/TAX INCREMENT FINANCING**

- APPLICANT:** Amazon, or designee
- TAX INCREMENT:** Pursuant to ORC Sec. 5709.41, 100% of the value of the increase in the property value attributed to the new development will be exempted. The City and the Applicant shall enter into a separate Agreement for each Phase of the Project.
- PAYMENT IN LIEU OF TAXES:** Applicant shall make Payments In Lieu of Taxes (PILOTS) to the City in an amount equal to the amount of taxes exempted.
- USE OF PILOTS:** PILOTS will be distributed to the School District in an amount equal to the amount that the School District would have received in the absence of the exemption. The remaining PILOTS will be disbursed to the Applicant to support the project, for eligible uses subject to the approval of the City.
- TERM:** An ordinance will be passed for each affected property, and will be in effect for each property for a period of thirty (30) years from passage of the ordinance.
- VALUE OF INCENTIVE:** Based on a projected construction value of \$400-\$600/SF, the value of the incentive is estimated at between \$657,405,050 and \$986,852,933.

**GENERALLY APPLICABLE CONDITIONS**

**OTHER REGULATIONS:** Applicant; or its prospective developers, contractors, or landlords, to comply, as agreed, with all federal, state, and local regulations to the extent that they are applicable with such assistance, including;

**City's 15% MBE / 7% FBE / 8% CSB (Cleveland Small Business) requirement:** If total construction costs are certified by the City to exceed Ten Thousand Dollars (\$10,000) on vertical construction, the City will require good faith efforts to award fifteen percent (15%) of the contracts and supplier purchase orders to certified MBE firms and seven percent (7%) of the contracts and supplier purchase orders to certified FBE firms and 8% CSB participation. On all other construction CSB is 30%. If Borrower does not meet this standard, Borrower agrees to pay the City a penalty equal to ten percent (10%) of the total amount of the City Loan Funds disbursed. For additional information please contact the City of Cleveland OEO Department.

**Fannie Lewis Resident Employment Law:** For Projects with construction costs of \$100,000 or more, there must be 20% Cleveland residents for the construction project and 4% of those employees must be certified as low-income residents.

**Living Wage:** The wage only compensation of all employees must be a Living Wage, currently a minimum of \$10.00 per hour per employee for all end users with 20 or more employees and all not-for profit end users of 50 or more employees.

**INSURANCE:** Business Hazard insurance is required naming the city as a loss payee in the amount of the loan.

**PERMITS:** Borrower/Grantee shall furnish evidence satisfactory to the City of the issuance, on terms and conditions satisfactory to the City by all appropriate governmental authorities and agencies, of all licenses, approvals or permits necessary in connection with the Project.

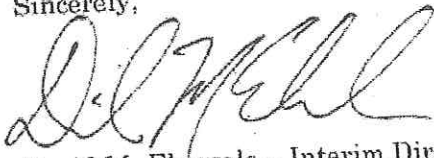
**REGULAR REPORTING:** The Borrower/Grantee and Guarantor(s) shall submit:

- Annual tax returns and financial statements
- Evidence of current and continuing business hazard insurances;
- Annual job maintenance and creation reports



Your acceptance of the terms and conditions stated herein together with all necessary documentation for final request review must be delivered to the Department of Economic Development on or before **July 31, 2018**. Your failure to comply will result in the withdrawal of this Letter of Understanding. Any requests for an extension of this Letter of Understanding must be made in writing prior to **July 24, 2018**. Any requests for an extension of this Letter of Understanding must be made in writing. If you have any questions on the City's financial package outlined above or other matters, please contact me by email at [debersole@city.cleveland.oh.us](mailto:debersole@city.cleveland.oh.us) or at (216) 664-2204.

Sincerely,



David M. Ebersole - Interim Director  
Department of Economic Development

Please sign and return the original copy of this letter with a complete application.

I have read and reviewed all information contained above and understand the terms of the financing that has been offered.

By: \_\_\_\_\_

\_\_\_\_\_ Date

\_\_\_\_\_ Print Name

\_\_\_\_\_ Title

## THE PORT OF CLEVELAND

The Port is authorized to undertake activities that promote water transportation and economic development, and it is organized into primarily two operating groups, Maritime and Real Estate and Development Finance. The Port has the ability to exercise the right of eminent domain, purchase, construct, equip, sell, lease, and operate facilities and issue revenue bonds for such purposes.

The Port is a key to Northeast Ohio's global competitiveness, providing the quickest route between North America's Heartland and Northern Europe and linking the region to the world. An economic engine for Northeast Ohio, the Port brings over 13-million tons of cargo through the Cleveland Harbor, resulting in \$3.5 billion in annual economic activity and more than 20,000 jobs. As a Green Port on a Great Lake, the Port of Cleveland plays a leading role in the environmental restoration and revitalization of Lake Erie and the Cuyahoga River, and helps to create vibrant, accessible waterfronts for all.

Since 1993 over 120 companies, developers, local governments and non-profits have collectively secured over \$3.5 billion through the Port's development finance programs. These projects total over 13 million square feet of development, much of which is owned by the Port Authority and managed by private companies.

### **Flats East Bank Case Study:**

The Port of Cleveland was a critical component of a \$500 million redevelopment of the Flats East Bank located in downtown Cleveland. The project transformed 20 blighted acres along the banks of the Cuyahoga River and Lake Erie into a thriving waterfront district. A phased development, the first phase alone represented over \$272 million in project costs and included an 18 story, 476,000 square foot office tower; a 150 room Aloft Hotel; 31,000 square feet of retail and restaurants; a 550 space parking garage and engaging public spaces including a river front promenade and a 1,200 square foot boardwalk.

### **Amazon Fulfillment Center Case Study:**

In August of 2017, the Port of Cleveland issued \$123 million in taxable lease revenue bonds in order to assist in the construction of an approximately 855,000 square-foot fulfillment facility to be built by Seefried Industrial Properties, Inc. on behalf of Amazon.com in the Village of North Randall, Ohio. The Port's streamlined and straightforward financing process allowed the project to close at the accelerated pace requested by the project partners.

### **Eaton World Headquarters Project:**

The Port Authority issued \$150 million of taxable revenue bonds for the approximately \$170 million office headquarters project. The bonds were used to assist in the construction and equipping of a 10-story, 470,000 square foot office building to be used as the corporate world headquarters for the Eaton Corporation within the Chagrin Highlands development located in the City of Beachwood, Ohio.



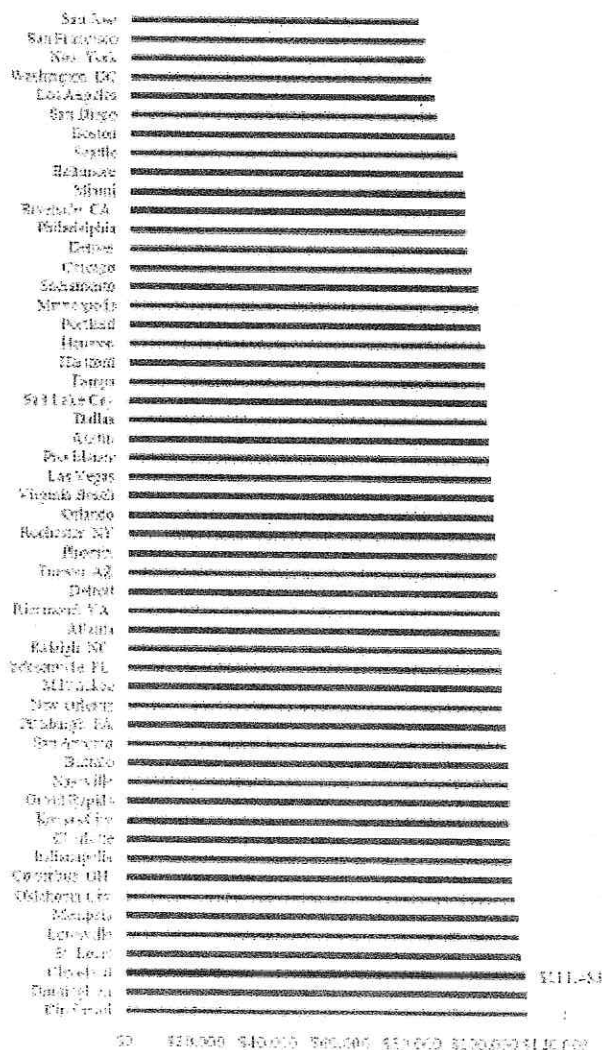
# LABOR FORCE AND WAGES

# CENTER FOR POPULATION DATA POINTS

Talent, Affordability, and Room to Grow. Data points by the Center for Population Dynamics at Cleveland State University's Maxine Goodman Levin College of Urban Affairs.

1. The technology industry, like manufacturing before it, is increasingly being "decoupled" from centers of agglomeration, with cost of living dynamics acting as a "push" factor for coastal-based firms. Cities that are affordable will increasingly be a draw. The average projected salary of \$100,000 for Amazon's second headquarters will go further in the Cleveland metropolitan area than nearly every metro over 1 million people. Specifically, when taking into account the Bureau of Economic Analysis regional price parity, a 100k salary in Cleveland stretches to \$111,483, compared to approximately \$80,600 in San Jose, \$82,000 in New York, and \$91,400 in Seattle.

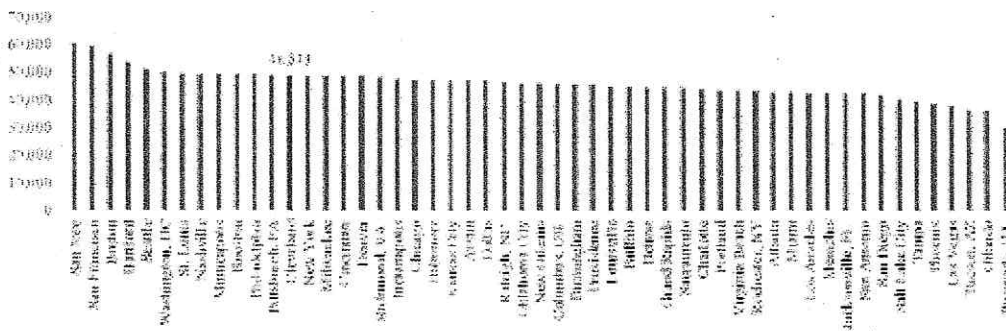
What's \$100,000 Worth in Largest U.S. Metro?  
Source: Regional Price Parity, BEA 2016



# CENTER FOR POPULATION DATA POINTS

2. Affordable, however, does not necessarily mean a region is lower skilled. Real per capita income for Cleveland ranks 13th out of the nation's 53 metros over 1 million plus. This income is tied to the skill of the region's labor pool. Nearly eighteen percent (17.5%) of Cleveland's workforce has an advanced degree, ranking the region 11th out of the nation's largest 40 metros, just ahead of Portland. The region's young adult workforce is particularly highly-educated: 19.9% have an advanced degree, ranking Cleveland 7th, one spot above Denver.

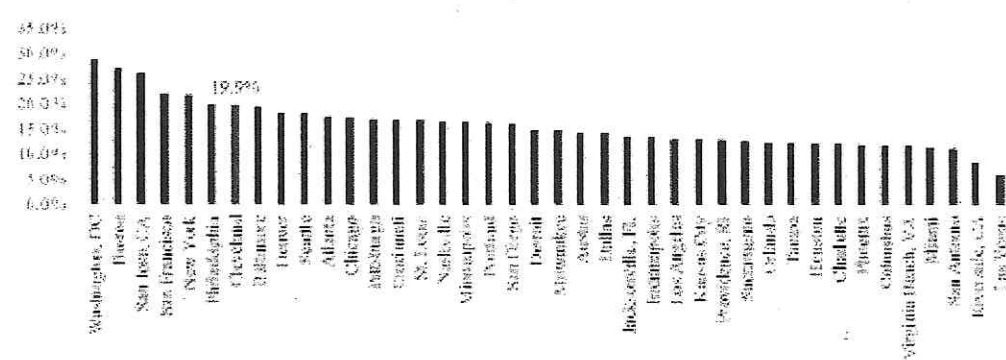
Real Per Capita Income for Metros 1 Million Plus. Source: BEA, 2016



Percent of Labor Pool with Advanced Degree Largest 40 Metros. Source: Current Population Survey, 2016



Percent of Labor Pool aged 25 to 44 with Advanced Degree. Source: Current Population Survey, 2016



# CENTER FOR POPULATION DATA POINTS

3. The trajectory of Cleveland's highly-educated workforce is ascendant. From 2000 to 2016, the percentage of the labor pool with an advanced degree went from 10.5% to 17.5%: a 7 percent point increase. This ranked as the 6th largest percent point increase in the concentration of skilled workers out of the Top 40 metros since 2000.

**Largest Percent Point Change in Workers with Advanced Degree Top 40 Metros. Source: CPS, 2000, 2016.**

	2016	2000	Change
San Jose, CA	26.0%	16.1%	9.9%
Seattle	19.0%	10.8%	8.1%
Jacksonville, FL	14.7%	7.2%	7.6%
Boston	26.9%	19.5%	7.4%
Washington, DC	29.1%	21.8%	7.3%
<b>Cleveland</b>	<b>17.5%</b>	<b>10.5%</b>	<b>7.0%</b>
Charlotte	12.9%	6.0%	6.9%
St. Louis	16.5%	9.9%	6.6%
Atlanta	17.0%	10.4%	6.6%
Minneapolis	17.0%	10.6%	6.5%

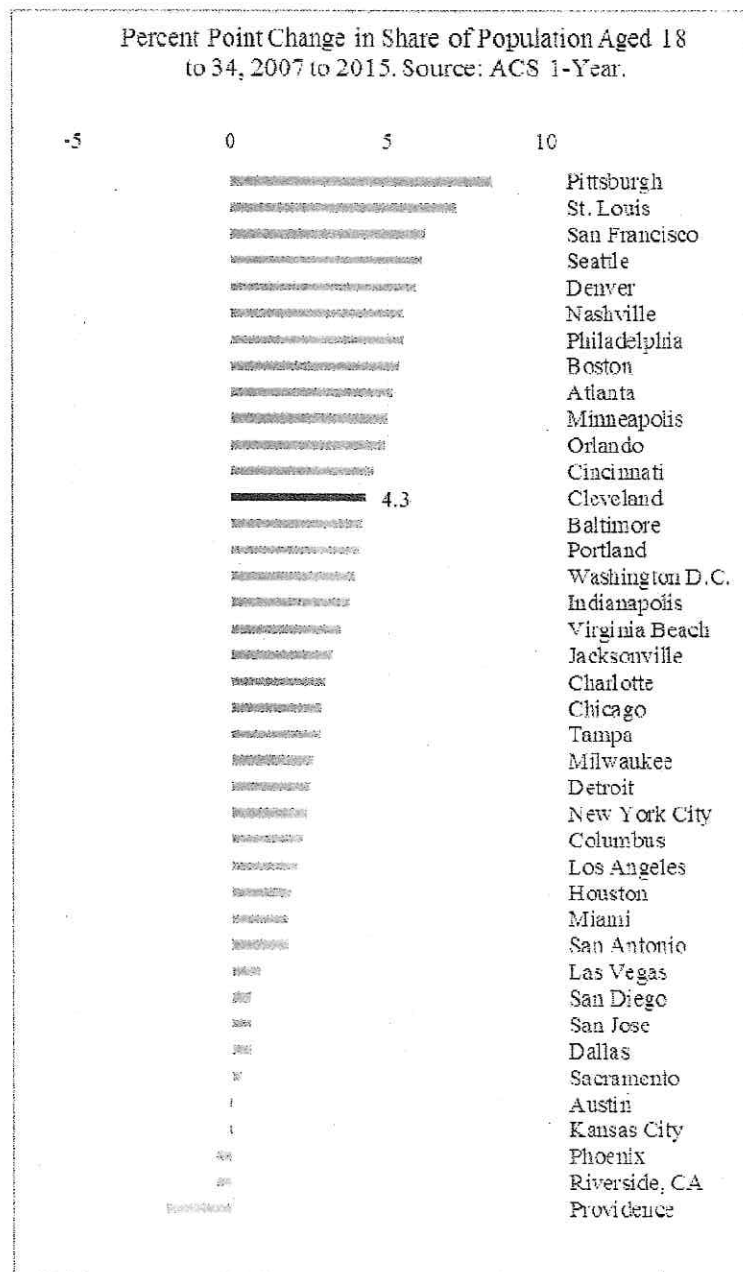
4. Cleveland is exceptional in its ability to attract highly-educated, foreign-born talent. Over twenty-one percent (21.6%) of immigrants in Cleveland have an advanced degree, ranking the region 6th out of the Top 40 metros, just ahead of Boston.

Percent of Immigrants with an Advanced Degree Top 40 Metros. Source: ACS 1-Year, 2015.



# CENTER FOR POPULATION DATA POINTS

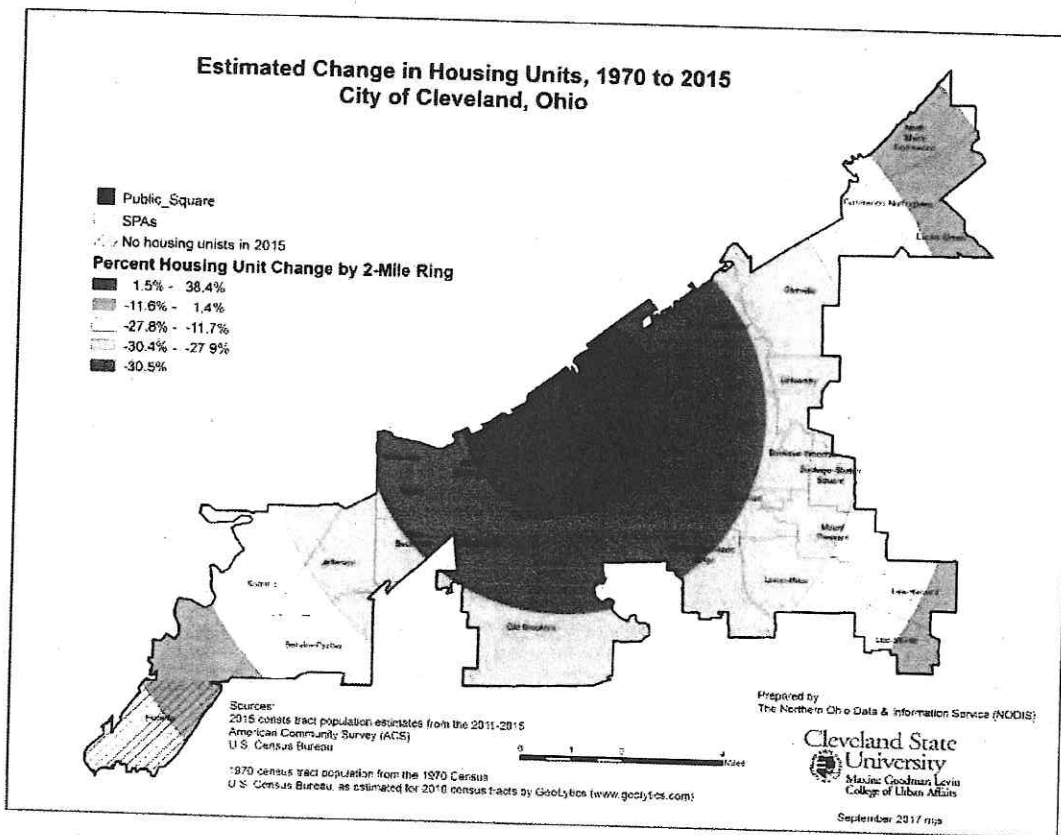
5. As the Cleveland region benefits from an “outside in” attraction of global talent, the city proper is experiencing a revitalization that’s unfolding from the “inside out”, driven primarily by young adults. The share of residents in the City of Cleveland aged 18 to 34 increased by 4.3 percentage points from 2007 to 2015, good for 13th out of the core municipalities in the Top 40 metros.



# CENTER FOR POPULATION DATA POINTS

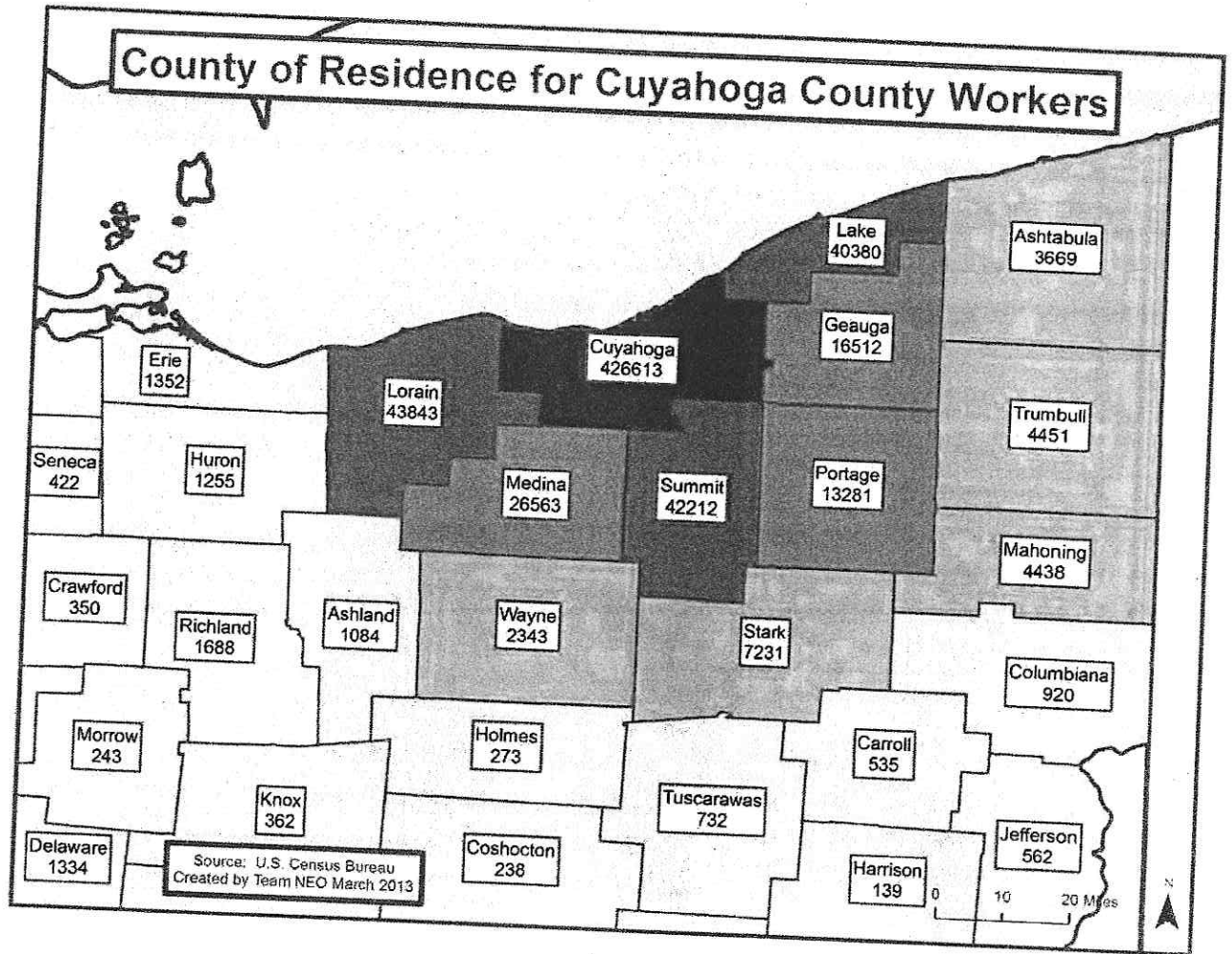


6. This "inside out" revitalization is tied to significant resettling in Cleveland's urban core. From 1970 to 2015, the number of housing units within a 2 mile radius of Cleveland's Downtown increased by 38%. This not only shows that the heart of Cleveland is regrowing, but that there is room in Cleveland to grow. This is no small asset in a nation in which so many municipalities with world-class assets are already built out.



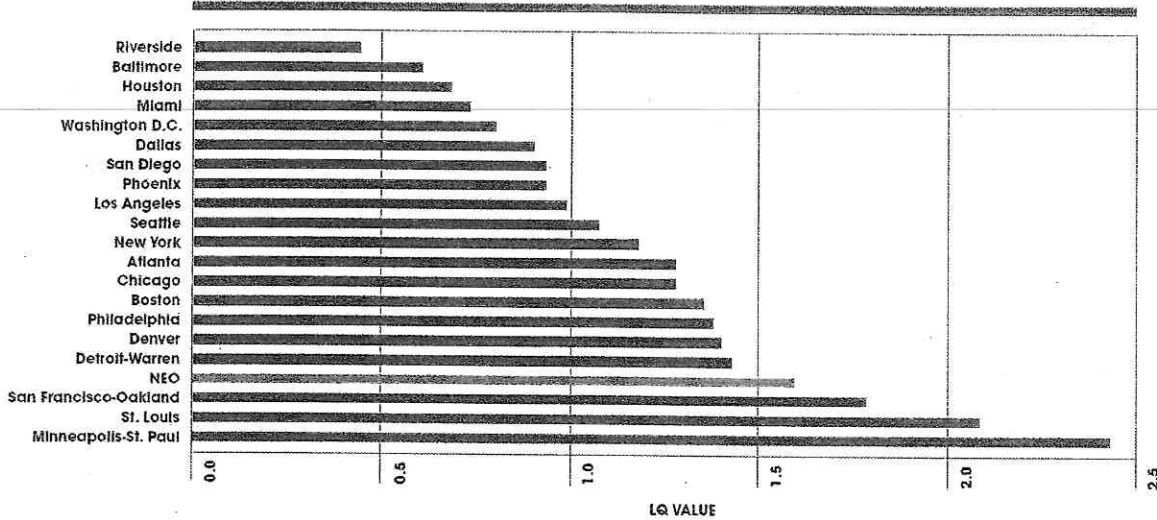


# JOURNEY TO WORK



# Labor and Workforce

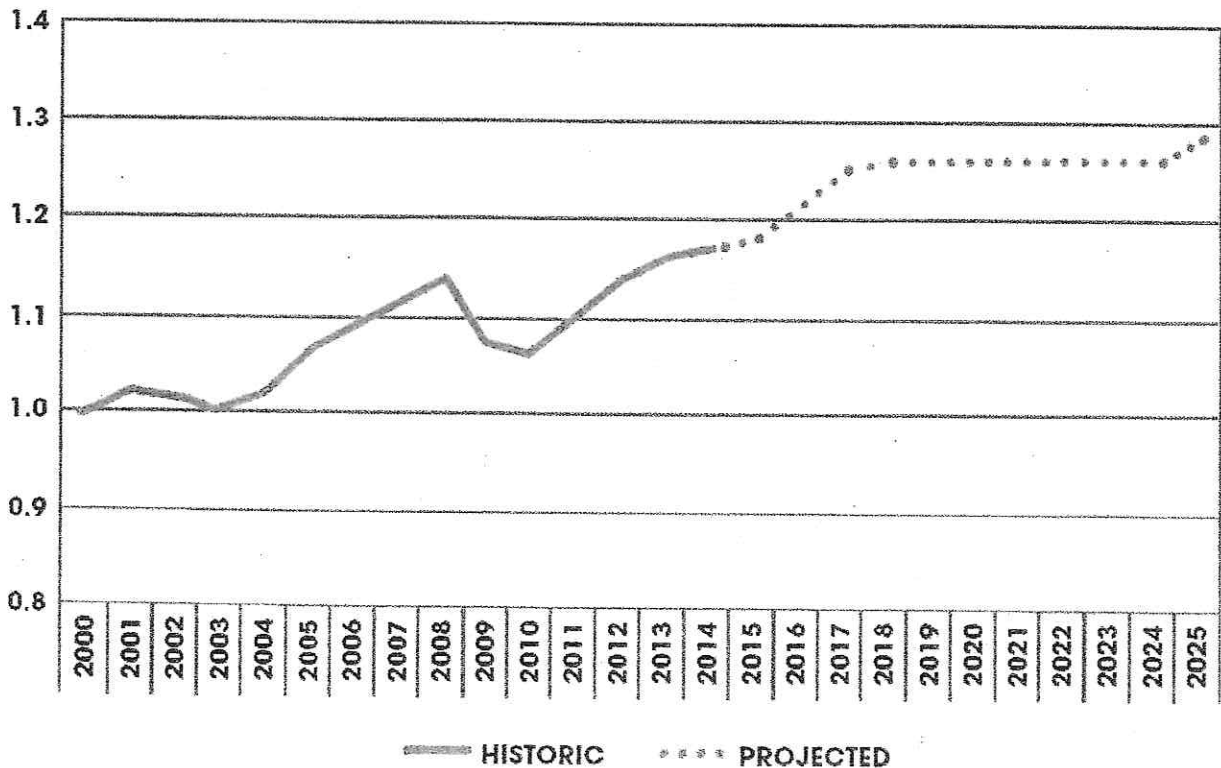
**CONCENTRATION OF HQ EMPLOYMENT IN THE 20 LARGEST US METROS: 2014**  
US AVERAGE = 1.0



**KEY**  
Location Quotient (LQ) compares Northeast Ohio and other regions to the US as a whole. An LQ of 1.0 represents the national average. An LQ of 1.5 is 50% higher than the national average. An LQ of 0.5 is 50% lower than the national average. LQs above 1.0 generally represent sectors that are exporting goods or services from a region.

Source: Moody's Economy.com 2015

**HQ & PROFESSIONAL SERVICES EMPLOYMENT: 2000-2025**  
1.0 = EMPLOYMENT IN 2000



# Labor and Workforce

	Fortune 1000 Ranking	Company Name	City	County	State	Industry
<b>Fortune 500</b>	120	Progressive Corp	Mayfield Village	Cuyahoga	OH	Insurance
	184	Goodyear Tire & Rubber Co	Akron	Summit	OH	Tire & Rubber
	196	First Energy Corp	Akron	Summit	OH	Utility & Power Generation
	236	Sherwin-Williams Co	Cleveland	Cuyahoga	OH	Paints & Coatings
	251	Parker-Hannifin Corp	Cleveland	Cuyahoga	OH	All Other Misc General Purpose Machinery Mfg
	346	J M Smucker Co	Orrville	Wayne	OH	Food Production & Consumer Goods
	470	Travel Centers Of America LLC	Westlake	Cuyahoga	OH	Gasoline Stations
	479	Key Corp	Cleveland	Cuyahoga	OH	Banking
	529	RPM International Inc	Medina	Medina	OH	Paints & Coatings
	672	Diebold Nixdorf Inc	North Canton	Summit	OH	Financial Security Systems and Equipment
<b>Fortune 1000</b>	673	Poly One Corp	Avon Lake	Lorain	OH	Plastics & Materials
	698	Trans Digm Group Inc	Cleveland	Cuyahoga	OH	Aerospace & Aircraft Parts
	762	Medical Mutual Of Ohio	Cleveland	Cuyahoga	OH	Medical Insurance
	781	Timken Co	North Canton	Stark	OH	Bearings & Steel
	782	Aleris Corp	Cleveland	Cuyahoga	OH	Aluminum
	792	Hyster-Yale Materials Handling	Cleveland	Cuyahoga	OH	Industrial Machinery
	806	Applied Industrial Tech Inc	Cleveland	Cuyahoga	OH	Industrial Machinery
	811	A Schulman Inc	Fairlawn	Summit	OH	Plastics & Materials
	868	Lincoln Electric Holdings Inc	Cleveland	Cuyahoga	OH	Welding & Soldering Equipment
	907	Cleveland-Cliffs Inc	Cleveland	Cuyahoga	OH	All Other Nonmetallic Mineral Mining
965	American Greetings Corp	Westlake	Cuyahoga	OH	Greeting Cards & Consumer Goods	
996	Nordson Corp	Westlake	Cuyahoga	OH	Fluid Management & Dispensing Equipment	

# Labor and Workforce

45 Minutes from Cleveland    Metros over 1M

SOC	Description	Jobs	Median Annual Wage	Median Annual Wage	Wage Difference
11-1011	Chief Executives	1,316	\$206,980	\$199,556	\$7,424
11-1021	General and Operations Managers	16,089	\$92,745	\$111,016	(\$18,271)
11-2021	Marketing Managers	1,506	\$123,498	\$137,933	(\$14,434)
11-2022	Sales Managers	3,146	\$115,814	\$124,215	(\$8,401)
11-3011	Administrative Services Managers	2,187	\$83,968	\$95,782	(\$11,815)
11-3021	Computer and Information Systems Managers	3,042	\$122,117	\$143,357	(\$21,240)
11-3031	Financial Managers	5,244	\$115,310	\$132,173	(\$16,863)
11-3121	Human Resources Managers	1,033	\$102,111	\$115,281	(\$13,170)
11-9199	Managers, All Other	2,747	\$101,320	\$112,617	(\$11,298)
13-1022	Wholesale and Retail Buyers, Except Farm Products	1,200	\$54,180	\$54,925	(\$745)
13-1023	Purchasing Agents, Except Wholesale, Retail, and Farm Products	2,785	\$61,215	\$67,314	(\$6,099)
13-1041	Compliance Officers	1,591	\$57,189	\$72,352	(\$15,163)
13-1071	Human Resources Specialists	4,434	\$55,097	\$62,518	(\$7,421)
13-1081	Logisticians	1,223	\$67,932	\$75,574	(\$7,641)
13-1111	Management Analysts	4,497	\$73,954	\$85,593	(\$11,639)
13-1151	Training and Development Specialists	2,141	\$56,632	\$62,616	(\$5,984)
13-1161	Market Research Analysts and Marketing Specialists	5,679	\$62,252	\$66,243	(\$3,991)
13-1199	Business Operations Specialists, All Other	7,460	\$62,089	\$72,426	(\$10,337)
13-2011	Accountants and Auditors	11,508	\$67,162	\$72,318	(\$5,156)
13-2051	Financial Analysts	2,201	\$72,293	\$85,748	(\$13,455)
13-2072	Loan Officers	2,574	\$70,679	\$67,733	\$2,946
15-1121	Computer Systems Analysts	5,365	\$77,320	\$90,539	(\$13,219)
15-1132	Software Developers, Applications	7,981	\$85,436	\$104,734	(\$19,298)
15-1133	Software Developers, Systems Software	1,278	\$87,447	\$110,589	(\$23,142)
15-1142	Network and Computer Systems Administrators	3,315	\$74,026	\$86,068	(\$12,042)
15-1151	Computer User Support Specialists	4,312	\$43,329	\$52,470	(\$9,140)
23-1011	Lawyers	5,193	\$96,779	\$130,241	(\$33,462)
41-3031	Securities, Commodities, and Financial Services Sales Agents	2,902	\$60,787	\$70,706	(\$9,919)
41-3099	Sales Representatives, Services, All Other	8,082	\$52,693	\$55,431	(\$2,738)
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	12,613	\$60,322	\$59,330	\$992
43-1011	First-Line Supervisors of Office and Administrative Support Workers	11,098	\$53,057	\$57,343	(\$4,286)
43-3011	Bill and Account Collectors	4,044	\$31,677	\$36,741	(\$5,065)
43-3021	Billing and Posting Clerks	4,984	\$35,474	\$37,880	(\$2,405)
43-3031	Bookkeeping, Accounting, and Auditing Clerks	14,594	\$37,643	\$41,026	(\$3,383)
43-4051	Customer Service Representatives	17,394	\$33,749	\$34,072	(\$323)
43-4131	Loan Interviewers and Clerks	3,097	\$38,511	\$41,322	(\$2,810)
43-5061	Production, Planning, and Expediting Clerks	3,399	\$45,064	\$47,945	(\$2,881)
43-6011	Executive Secretaries and Executive Administrative Assistants	4,616	\$52,169	\$59,838	(\$7,669)
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	19,732	\$35,216	\$37,046	(\$1,830)
43-9061	Office Clerks, General	22,484	\$29,666	\$32,333	(\$2,667)

**LARGEST 4-YEAR INSTITUTIONS, BY ENROLLMENT**

Institution Name	Total Enrollment
Kent State University at Kent	35,386
University of Akron Main Campus	27,833
Cleveland State University	20,660
Youngstown State University	15,285
Case Western Reserve University	11,479
Ashland University	8,527
Baldwin Wallace University	4,784
John Carroll University	4,006
Walsh University	3,496
Oberlin College	3,094

**LARGEST 2-YEAR INSTITUTIONS, BY ENROLLMENT**

Institution Name	Total Enrollment
Cuyahoga Community College District	40,591
Stark State College	16,740
Lorain County Community College	15,126
Lakeland Community College	11,143
North Central State College	3,760

**TOTAL REGIONAL ENROLLMENT, BY LEVEL OF INSTITUTION**

Total Enrollment	Total Enrollment
Total 4 year Enrollment	191,743
Total 2 year Enrollment	104,884
Less than 2 year Enrollment	7,021
<b>Total Enrollment</b>	<b>303,648</b>

**NORTHEAST OHIO INTERNATIONAL COLLEGE ENROLLMENT**

School Type	Total	% of Total
Four Year +	10,963	5.7%
All Enrollment	11,938	3.9%

Source: US Department of Education, IPEDS, 2014-2015

# WORKFORCE TRANSFORMATION FOR CUYAHOGA COUNTY

## Introduction

Over the past several months, the County has worked with many others to design a new approach to helping our residents move from poverty to work, and we continue to drive that work forward with our public and private partners. Beyond that, we are faced with the broader challenge of how to eliminate workforce as a significant barrier to business growth and profitability. As always, this challenge also is an opportunity to work together in new and different ways to achieve more than any one of us could alone – to make our workforce a competitive advantage for Northeast Ohio. We have started the conversation with a small, cross-sector group of funders of our region’s workforce efforts. Our shared goal is to design together a coordinated, well-functioning workforce system that delivers the following:

1. Supports business growth and profitability through a workforce pipeline that delivers a sufficient and steady supply of qualified candidates at all skill levels to keep jobs filled;
2. Helps residents with employment barriers (that keep them outside the pipeline) become skilled workers pursuing career and wage pathways (inside the pipeline); and
3. Builds alignment among public, private and philanthropic funders to invest our separate workforce dollars in ways that move forward shared goals and priorities, and measure success by shared outcomes and impact

Each of these goals is being pursued through integrated work streams by the County and our many partners. This paper describes why this effort is a top priority for the Budish Administration, and our path forward.

## **DEVELOPING OUR WORKFORCE IS A TOP PRIORITY FOR OUR REGION**

**Workforce is the most significant barrier to business growth.** This is what the County Executive was told repeatedly when he met with over 100 business leaders during our first 100 days. We are fortunate to have many successful programs and promising, innovative approaches focused on developing our workforce throughout our region. And yet, despite the tens of millions of dollars in public and private resources devoted to job creation and opportunity efforts every year, we still are challenged to establish a well-functioning workforce pipeline that delivers a steady and sufficient supply of qualified candidates to keep jobs filled.

**At the same time, our residents are asking for more from us, starting with their own County Government.** We are offering public benefits and supportive human services, but they are asking for our help to get jobs – or more precisely, careers. This is particularly important because Northeast Ohio is one of the hardest places to move up in the United States, according to Professor Raj Chetty based upon data from The Equality of Opportunity Project. This data shows that a child born to a low income family here has only a 5 to 7 percent chance of advancing from bottom fifth to top fifth in the income distribution. This means that the place and condition of one’s birth still defines the outer boundaries of possibility for far too many in our community. We can no longer tolerate this in our County. Not only is it unfair and inequitable, but our businesses’ unmet workforce demand make it an economic imperative.

**This challenge goes right to the core of who we are as a new County Government.** Over the past several months, the County has worked with many others to design a new approach to helping our residents move from poverty to work, and we continue to drive that work forward with our public and private partners. Beyond that, we are faced with the broader challenge of how to eliminate workforce as a significant barrier to business growth and profitability. This challenge goes right to the core of who we are as a new County Government, but will take all of us – government, business, foundations, education, non-profits, service providers, job seekers – to resolve.

The core services of the County have historically focused on health and human services. The County also has a long history with workforce programs, because for decades, lawmakers have attached work requirements to public benefits like cash, food and child care assistance. This put the County in the workforce business for people with high barriers to employment, but with the primary goal of maintaining eligibility and compliance to ensure that our residents did not lose their benefits before they were ready or exhaust their allowable term of benefit eligibility.

In 2009, the people of this County adopted a new Charter that transformed our government structure and declared “job creation and economic growth” as a “fundamental governmental purpose.” This Charter mandate to improve the County’s economic competitiveness demands that we take a fresh look at everything we do – starting with our workforce services – and brings us in closer alignment with the business community, Workforce Development Board, and many other of our public and private partners. Similarly, while it is important to support our residents with public benefits until they are ready to make it on their own, our new guiding principle is this – when we successfully deliver a career ladder for an individual out of poverty, we also add a talent resource available to fulfill our businesses’ needs. We now know that we must plan our health and human services, economic development, workforce and education strategies together. This gives us greater opportunities to leverage resources across systems and sectors to better serve the needs of both our businesses and residents.

#### **MOVING TOWARD A COORDINATED WORKFORCE SYSTEM**

**We have the opportunity to design together a coordinated workforce system that works for business and job seekers.** Our community has been moving toward a more coordinated systems approach for many years. This move started with the Intergovernmental Agreement between the City of Cleveland and Cuyahoga County creating one unified Workforce Development Board. It continued with local and regional efforts like the Workforce Development Board’s Strategic Workforce Alignment Group (SWAG) process, Regional Economic Competitiveness Strategy (RECs) process and the current regional planning process required by the State of the five Workforce Development Boards in our 8-county region. Recent policy shifts have pushed change as well, most significantly the shift from the Workforce Investment Act (WIA) to the Workforce Innovation and Opportunity Act (WIOA). All of these efforts have contributed to moving us toward sector partnerships, career pathways, and other opportunities for closer alignment between workforce, economic development, education and human services strategies. We now have the political will at the local, state and federal levels to close the circle and create a more comprehensive workforce system, to build on the work that has been done separately in our community and move forward in partnership together.

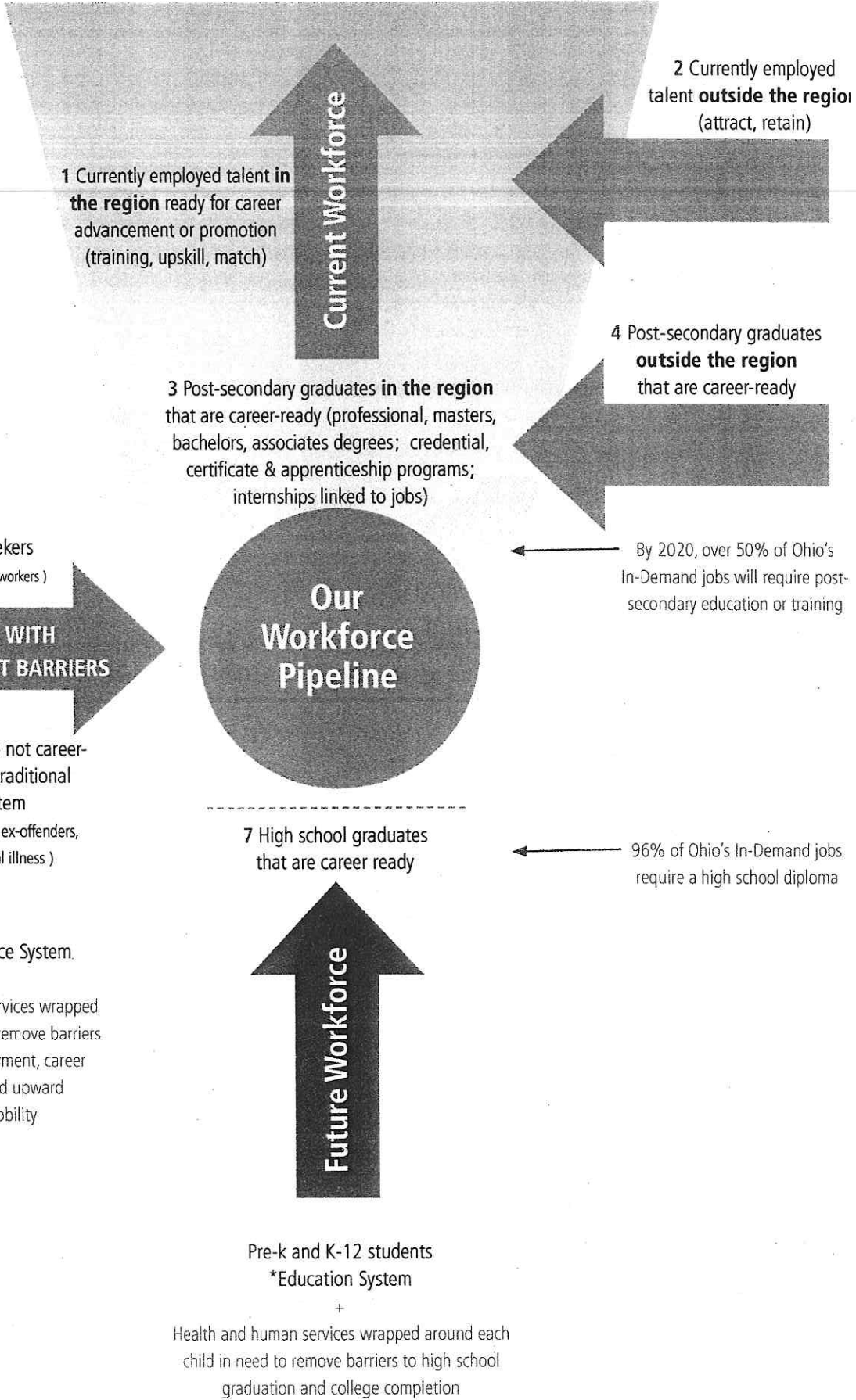
## Defining What “Success” is for our Coordinated Workforce System

TARGET	FROM	TO
<p><b>Sector Partnerships to keep In-Demand Jobs filled:</b> Jobs that business leaders identify as driving their growth and profitability</p> <p><b>Job seekers:</b> Job seekers at all skill levels that are ready or near ready to fill these jobs (priority starts at #1 on Workforce Pipeline)</p>	<p><b>Separate programmatic efforts to meet current demand</b> <u>Separate, programmatic demand-driven efforts</u> to meet current needs of business based upon limited information from business</p> <p><u>Separate, programmatic supply-driven efforts</u> to meet current needs of job seekers based upon best-practice research, expertise and experience of providers and job seekers</p> <p><u>Collaborative pilot efforts</u> providing good information and not yet scaled</p>	<p><b>Shared systems-level focus on eliminating demand-supply gap for in-demand jobs now and in the future in a sustainable way</b></p> <p><u>Strong new and existing sector partnerships in place:</u></p> <ol style="list-style-type: none"> <li>1. Led by intermediaries,</li> <li>2. To achieve specific targets and systems-level strategies,</li> <li>3. Able to access reliable, dynamic data, and</li> <li>4. With ownership and accountability for eliminating demand-supply gap for in-demand jobs in that sector</li> </ol> <p><u>Clear intermediary for each sector partnership:</u></p> <ol style="list-style-type: none"> <li>1. Serving as “single point of contact” to give and get real-time information for business and job seekers, and</li> <li>2. Serving as “hub” to align programmatic efforts of funders and providers (e.g. public, non-profit, business, education)</li> </ol> <p><u>Shared focus on aligning, embedding, spreading and/or scaling up approaches that business leaders believe are effective</u> to eliminate the demand-supply gap for their in-demand jobs now and in the future</p> <p><u>Establish real-time predictive picture of business need for workforce</u> for in-demand jobs over near term (3 months) and longer term (3-5 years)</p>
<p><b>Career Pathways identified with business leaders for In-Demand Jobs:</b> A career and wage pathway for every job seeker</p> <p><b>Job seekers:</b></p> <ol style="list-style-type: none"> <li>1. Special Job Seekers (#5 on Workforce Pipeline)</li> <li>2. Job Seekers with employment barriers (#6)</li> <li>3. Future Workforce (#7)</li> <li>4. Near Ready and Ready Job Seekers (#1-4)</li> </ol>	<p><b>Separate programmatic efforts to meet current needs of job seekers for entry level jobs</b></p> <p><u>“Success” defined</u> as any job at any wage for up to 6 months (e.g. single rapid attachment approach)</p> <p><u>Separate, programmatic efforts</u> to meet current needs of job seekers based upon best-practice research, expertise and experience of providers and job seekers, and limited information from business</p> <p><u>Collaborative pilot efforts</u> providing good information, not yet scaled</p> <p><u>Insufficient supply</u> of high quality preschools, K-12 schools, and alternative paths to careers for youth</p> <p><u>Wrap-around services</u> provided to school-age children and families are not connected to goal of high school and post-secondary completion</p>	<p><b>Shared systems-level focus on meeting current needs of job seekers for an entry level job and a career and wage pathway</b></p> <p><u>“Success” redefined</u> as a starting job directly tied to a career pathway that leads to a family sustaining wage and employment benefits without public support</p> <p><u>Career pathways established with business leaders</u> for in-demand jobs in each sector as part of sector partnership approach (above)</p> <p><u>Individual career plans created with job seekers</u> that:</p> <ol style="list-style-type: none"> <li>1. Integrate support, readiness and advancement services, and</li> <li>2. Include post-placement coaching opportunities for education, employment and entrepreneurship</li> </ol> <p>Job quality is a priority for both businesses seeking to attract and retain talent (cut turnover), and providers helping people move forward on career pathways</p> <p>Future workers and entrepreneurs (P-16 youth) supported and encouraged to stay in school to improve long-term career prospects (i.e. tech ed &amp; apprenticeships tied directly to career, post-secondary completion)</p>
<p>All public, private and philanthropic workforce funders</p>	<p><b>Separate programmatic funding goals and priorities, and duplicative, disconnected planning conversations</b></p>	<p><b>Shared systems-level goals and priorities that drive better coordination and guide all local and regional workforce planning and funding decisions</b></p>



Talent available  
NOW  
(all skill levels)

TIME TO MARKET



1 Currently employed talent in the region ready for career advancement or promotion (training, upskill, match)

2 Currently employed talent outside the region (attract, retain)

Current Workforce

4 Post-secondary graduates outside the region that are career-ready

3 Post-secondary graduates in the region that are career-ready (professional, masters, bachelors, associates degrees; credential, certificate & apprenticeship programs; internships linked to jobs)

5 Special Job Seekers (e.g. veterans, dislocated workers)

PEOPLE WITH EMPLOYMENT BARRIERS

By 2020, over 50% of Ohio's In-Demand jobs will require post-secondary education or training

Our Workforce Pipeline

6 Job Seekers that are not career-ready after leaving traditional education system (e.g. disconnected youth, ex-offenders, drug addiction, mental illness)

96% of Ohio's In-Demand jobs require a high school diploma

7 High school graduates that are career ready

\*Public Workforce System.

+ Health and human services wrapped around each adult to remove barriers to sustained employment, career advancement and upward economic mobility

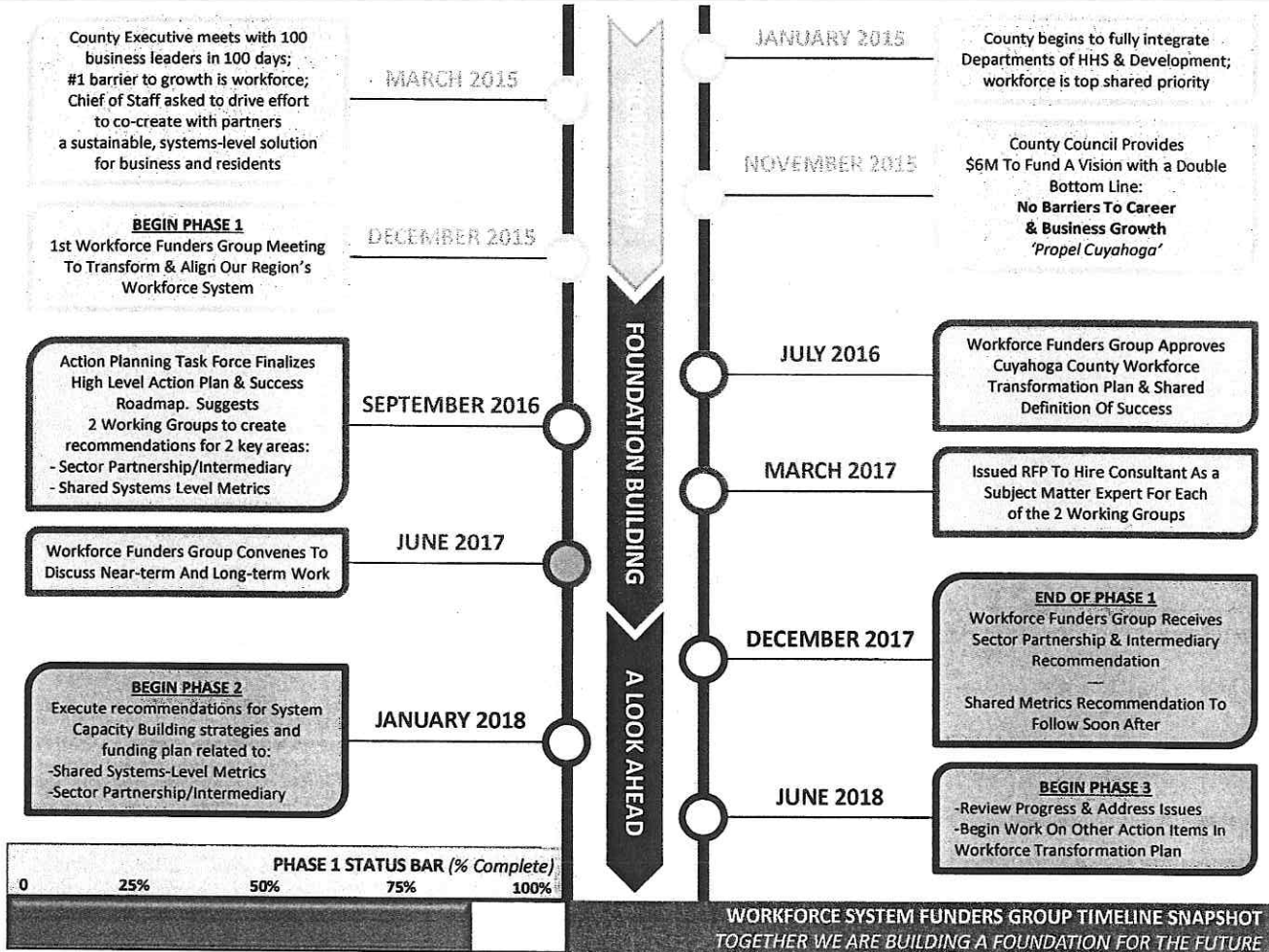
Future Workforce

Pre-k and K-12 students \*Education System

+ Health and human services wrapped around each child in need to remove barriers to high school graduation and college completion

TIME TO MARKET

# WORKFORCE SYSTEM FUNDERS GROUP TIMELINE SNAPSHOT



# AMAZON UNIVERSITY

Talent recruitment and enhancement are core Amazon values. With the number of employees expected to grow significantly in coming years, expansion of the corporate footprint presents an opportunity for company-wide talent enhancement.

As part of the Cleveland response, we propose development of an innovative training and learning facility called Amazon University.

Spread over ten acres on Cleveland State University's campus, walking distance from the proposed HQ site, Amazon University is envisioned as an educational park with a state of the art learning facility, a meeting and event center with a capacity of 5,500 to 6,000 and a K-12 school with a globally accredited International Baccalaureate program. The following are critical focus areas for Amazon University:

## **Learning and Talent Development Strategies**

The core innovation of Amazon University is the possibility of partnering with all of the member universities in the Higher Education Compact – with higher education institutions to provide customized learning and credentialing (description of Compact follows). A secretariat composed of participating local universities will function as a one-stop clearinghouse for Amazon talent needs. This secretariat will work with the Amazon human resources leadership to conceive and execute a human capital development plan for Amazon focusing on building a menu of programs designed to build and reinforce skills and organizational culture, particularly in the areas defined in the RFP. This plan will encompass the Cleveland headquarters and can expand to cover Amazon, companywide.

## **Noncredential Learning at Amazon University**

Our local higher educational institutions are eager to partner in providing learning opportunities that improve employee understanding of Amazon's operations, technology, and corporate culture. Many such opportunities may be termed noncredential blended learning. Blended learning combines online teaching and digital resources with traditional offline face-to-face instruction to provide the learner with a meaningful learning experience.

Our local business and management schools can deliver online combined with in-class noncredential courses such as Communicating at Amazon, Project Management, Supply Chain Management, Invent and Simplify, Learn and Be Curious, Hire and Develop the Best, Delivering Results. The key to meaningful noncredentialing opportunities, besides quality, is for employees getting both encouragement and time to see Amazon University as an opportunity to try new things, work better together, and test new ideas as they develop in their careers.

## **Credentials and Degrees at Amazon University**

Though noncredential learning opportunities will be a mainstay, Amazon will need a growing number of engineers, managers, and accountants. We don't envision Amazon getting into the higher education business; rather, the customized plan developed by the Amazon University Secretariat will ensure that various pipeline strategies are developed with partnering universities to produce Amazon talent with advanced degrees and involve Amazon in the development of career tracks that are central to business operations. Amazon executives would have an opportunity to participate in both the development and delivery of what

might be termed an "Amazon Track" in the disciplines identified in the RFP. Students in this track will have opportunities for extended internships at Amazon – creating an educational life cycle crucial to recruiting the best talent – in essence a pipeline or "farm system" that develops and ultimately promotes the best talent.

In order to maximize the pool of talented and specialized faculty who would become Faculty Fellows at Amazon, Cleveland enjoys a special advantage. The Higher Education Compact of Greater Cleveland (the compact), created in October 2011 is a consortium of virtually all public and private universities in Northeast Ohio. Presidents of participating universities compose the Compact's Board of Directors. The Incentives Appendix lists participating universities. No metro area has a comparable collaboration. This consortium vastly multiplies the academic and research resources available to Amazon. Faculty with the appropriate academic training who are interested and committed to becoming Amazon Faculty Fellows will be jointly selected by institutional representatives and members of the Amazon team. These faculty will need to demonstrate an abiding desire to use their academic skills in collaboration with Amazon leadership creating a bridge and feedback loop for all constituents. These faculty will, in time, develop the tools necessary to teach in the undergraduate Amazon degree tracks and mentor students interning at Amazon.

### **Living and Learning at Amazon University**

Amazon University will be developed as a 100,000-square-foot, five-story, eco-efficient facility dedicated to continuing education courses and programs, and specialized events. This positions Amazon University as the hub for company-wide training with the ability to accommodate employees from around the globe. The complex is adjacent to CSU's campus, with its recreational amenities and access to additional learning capacity.

### **The High School Pipeline**

Over the last six years, the region has recognized that computer science is a foundational skill to which all students in high school must have access. Cleveland State and the Cleveland Metropolitan School District have built and sustained a partnership that is building capacity in schools such that every high school in the district will have a rigorous computer science course sequence. To date, nearly 50 teachers, representing about half of all CMSD high schools have been trained, and a community of these teachers is being supported by CSU and other partners. These efforts are supported by nearly \$2M in NSF funding, complemented by \$600K in local funding. This year, the national organization TEALS (Technology Education and Literacy in Schools), which helps high schools build and grow sustainable computer science programs by pairing industry professionals and classroom teachers in a co-teaching model, has joined the CS for All effort in Cleveland. The program connects teachers with content experts in universities and business who have guided the development and training of computer science foundation in high schools, with the goal of reaching all students.

### **Volunteers**

TEALS volunteers come from 13 different companies in the region. Volunteers complete over 40 hours of in-person and online training over the course of the summer prior to entering the classroom. Training prepares volunteers with the foundational skills necessary to effectively lead lessons and facilitate classroom activities.

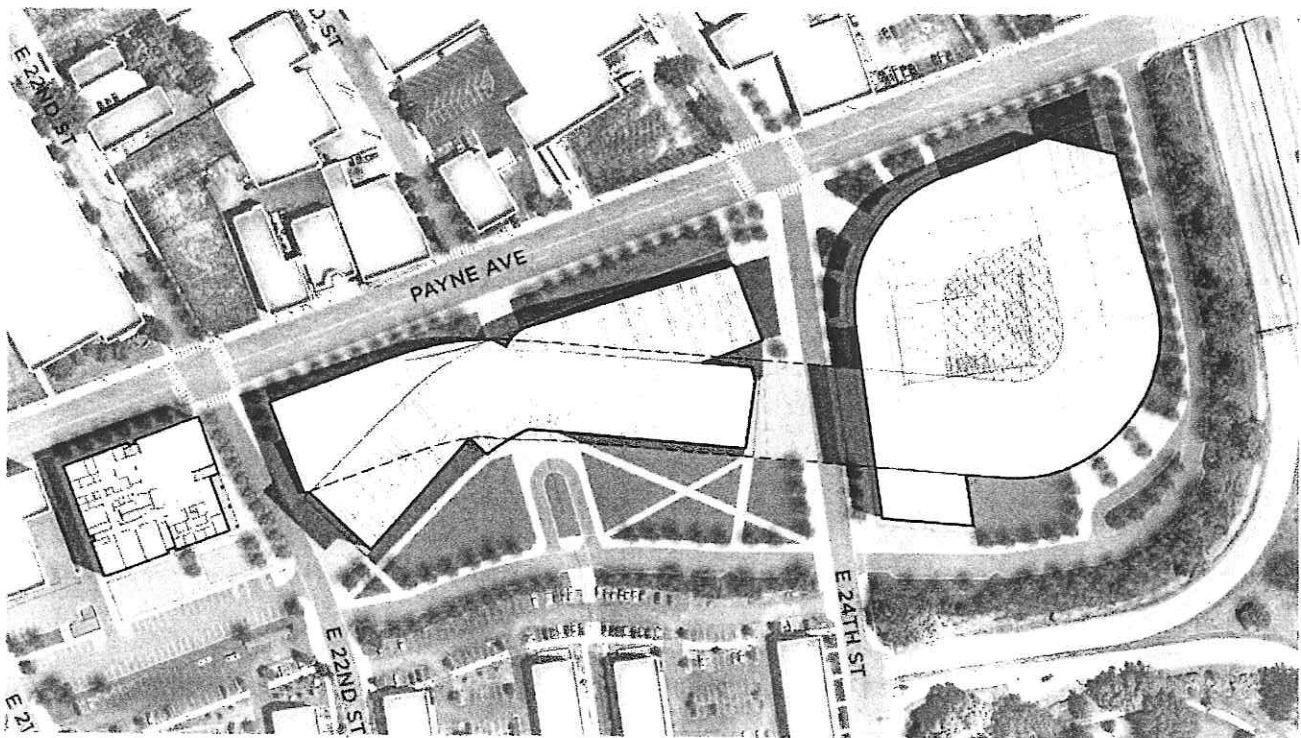
### **Amazon & Teals**

Amazon provides the second highest number of TEALS volunteers in the United States. Amazon's 32 TEALS volunteers' investment in this movement directly contributes towards increasing equity, access, and awareness of computer science across the country.

# CLEVELAND STATE UNIVERSITY CONCEPTUAL PLANNING

September 25th, 2017

BIALOSKY  
CLEVELAND

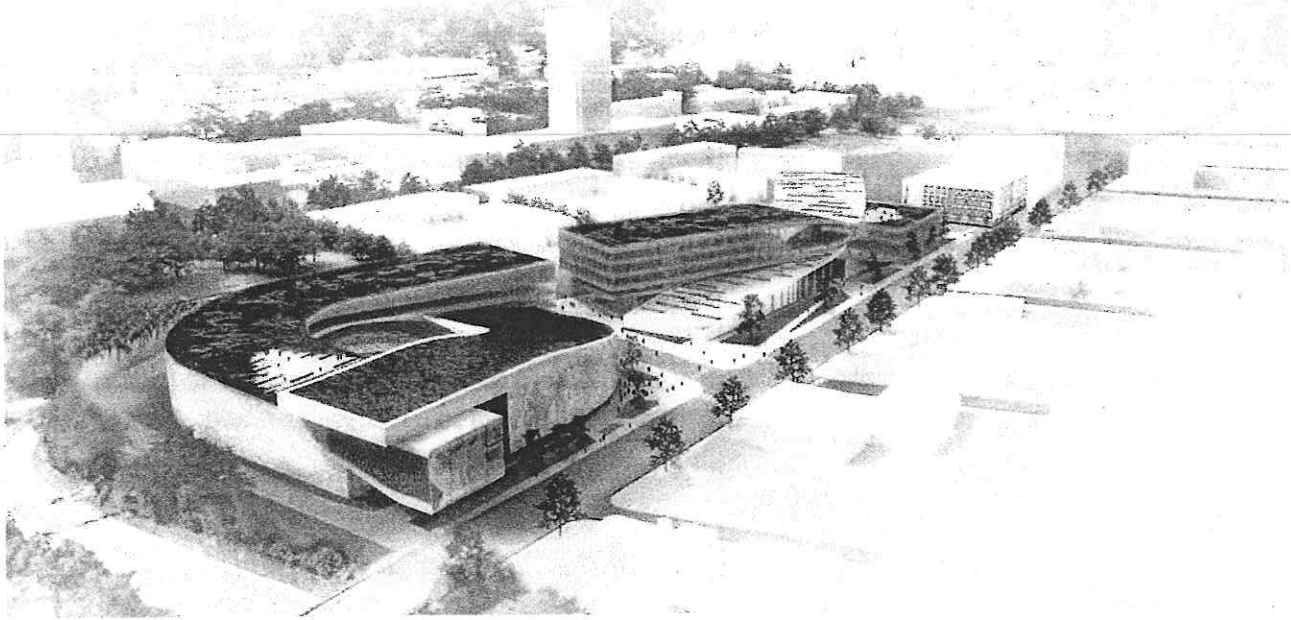


BIALOSKY  
CLEVELAND

CSU Conceptual Planning



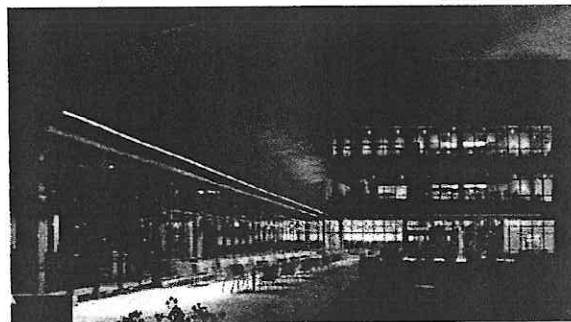
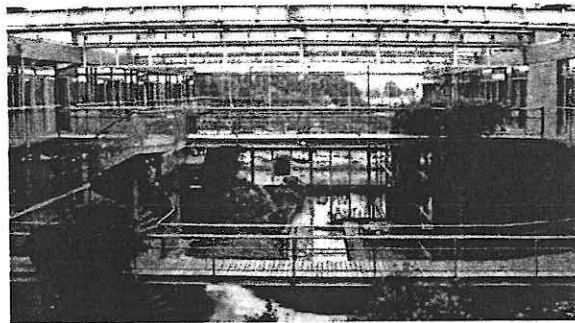
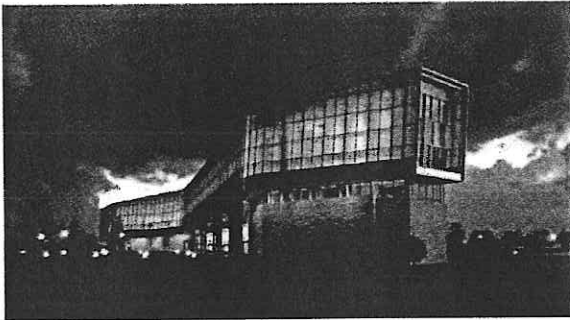
Site Plan  
September 25th 2017



**BIALOSKY**  
CLEVELAND

CSU Conceptual Planning

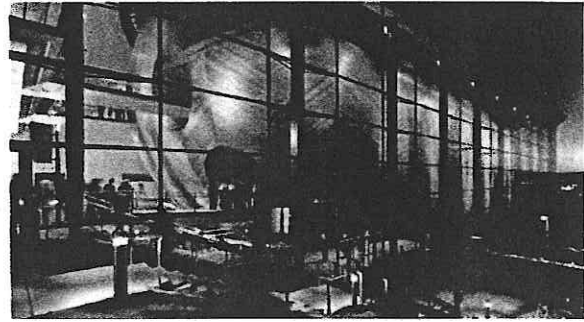
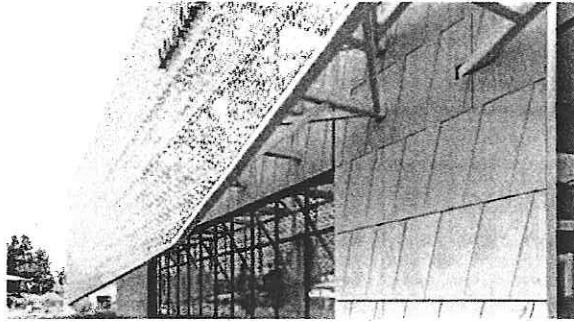
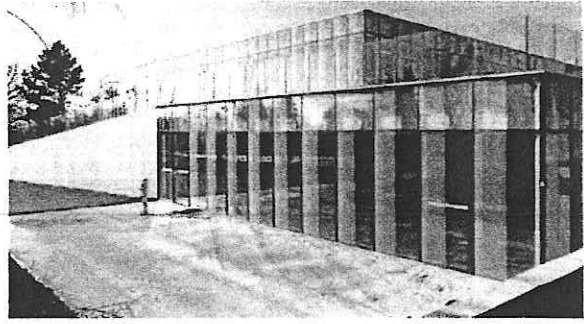
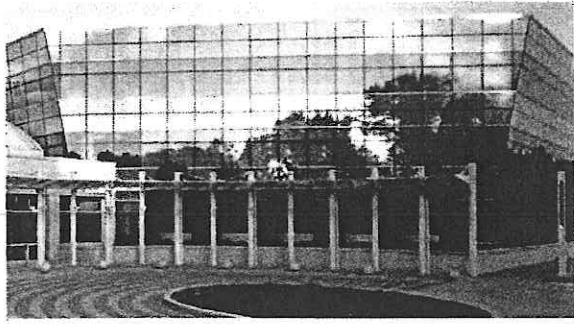
Aerial Rendering  
September 25th, 2017



**BIALOSKY**  
CLEVELAND

CSU Conceptual Planning

Building Experience Precedents  
September 25th, 2017



**BIALOSKY**  
CLEVELAND

## CSU Conceptual Planning

Material Precedents  
September 25th, 2017



# EDUCATION AND PARTNERSHIP



# DIVERSITY AMONG UNIVERSITIES

Institution	Total Enrollment	Women	American Indian or Alaska Native	Asian	Black or African American	Hispanic or Latino	Native Hawaiian or Other Pacific Islander	White	Two or more races	Race/ethnicity unknown	Non-resident alien
Eastern Michigan University	26,289	59.7%	0.3%	2.7%	17.9%	3.7%	0.1%	66.1%	3.0%	2.7%	3.5%
University of Akron Main Campus	27,833	49.7%	0.2%	2.4%	11.9%	2.2%	0.1%	71.9%	2.9%	2.6%	5.9%
University of Akron Wayne College	2,390	58.9%	0.5%	1.0%	2.7%	1.8%	0.0%	88.8%	2.2%	2.8%	0.2%
Baldwin Wallace University	4,784	57.2%	0.2%	1.5%	8.5%	4.6%	0.0%	76.5%	3.3%	3.9%	1.5%
Bowling Green State University-Firelands	2,738	64.1%	0.4%	0.6%	6.1%	5.1%	0.2%	80.5%	3.5%	3.6%	0.0%
Bowling Green State University-Main Campus	18,975	56.6%	0.2%	1.0%	8.9%	3.8%	0.1%	75.8%	2.6%	3.0%	4.5%
Case Western Reserve University	11,479	50.2%	0.1%	14.1%	5.6%	4.1%	0.0%	49.6%	2.5%	4.8%	19.2%
Cleveland State University	20,660	54.8%	0.2%	3.0%	17.4%	4.2%	0.1%	60.6%	2.4%	2.7%	9.3%
Cuyahoga Community College District	40,591	59.7%	0.6%	2.4%	30.1%	4.7%	0.0%	53.2%	2.1%	4.9%	2.0%
Hiram College	1,383	54.1%	0.1%	1.1%	16.7%	3.8%	0.2%	68.5%	2.3%	4.5%	2.8%
John Carroll University	4,006	51.9%	0.0%	1.7%	5.4%	2.8%	0.0%	81.3%	2.1%	4.1%	2.6%
Kent State University at Ashtabula	3,801	64.5%	0.4%	1.1%	5.8%	2.4%	0.2%	84.9%	2.1%	2.4%	0.7%
Kent State University at East Liverpool	2,846	67.5%	0.2%	1.0%	6.4%	2.3%	0.1%	83.9%	2.5%	3.0%	0.6%
Kent State University at Stark	7,230	61.7%	0.4%	0.9%	7.5%	2.2%	0.1%	82.3%	2.5%	3.4%	0.7%
Kent State University at Trumbull	5,092	63.7%	0.1%	0.7%	7.5%	2.4%	0.1%	83.2%	2.4%	2.8%	0.8%
Kent State University at Tuscarawas	3,117	57.2%	0.1%	0.7%	3.4%	1.3%	0.0%	88.5%	1.9%	2.7%	1.4%
Kent State University at Salem	2,692	70.5%	0.4%	0.8%	4.3%	1.9%	0.0%	87.5%	1.8%	2.7%	0.6%
Kent State University at Kent	35,386	59.9%	0.2%	1.5%	7.7%	2.6%	0.1%	72.1%	2.5%	4.0%	9.2%
Kent State University at Geauga	4,839	64.6%	0.4%	1.2%	9.8%	2.5%	0.1%	79.3%	2.4%	3.3%	1.0%
Notre Dame College	2,793	60.8%	0.4%	1.0%	20.9%	2.6%	0.4%	66.5%	2.0%	4.0%	2.3%
Oberlin College	3,094	55.5%	0.1%	4.1%	5.1%	7.2%	0.1%	69.5%	5.6%	0.8%	7.5%
Ohio State University Agricultural Technical Institute	761	44.8%	0.0%	0.3%	1.1%	1.6%	0.0%	93.3%	1.6%	2.2%	0.0%
Ohio State University-Lima Campus	1,276	55.2%	0.2%	2.1%	3.4%	2.5%	0.0%	86.8%	2.1%	2.8%	0.1%
Ohio State University-Mansfield Campus	1,571	57.9%	0.2%	2.7%	7.8%	3.2%	0.0%	81.2%	2.4%	2.2%	0.1%
Ohio State University-Marion Campus	1,463	52.0%	0.3%	4.0%	5.7%	3.6%	0.2%	81.6%	2.3%	2.0%	0.1%
Ohio State University-Newark Campus	2,835	51.9%	0.4%	3.6%	12.6%	2.8%	0.1%	73.9%	3.8%	2.6%	0.1%
Ohio State University-Main Campus	63,485	49.4%	0.1%	5.6%	5.6%	3.6%	0.1%	69.0%	2.6%	3.0%	10.4%
Ohio University-Eastern Campus	1,630	59.8%	0.2%	0.9%	3.0%	1.3%	0.0%	89.0%	3.0%	1.7%	1.0%
Ohio University-Chillicothe Campus	3,203	64.7%	0.3%	0.6%	4.5%	1.5%	0.1%	85.8%	3.7%	2.6%	1.0%
Ohio University-Southern Campus	2,862	62.9%	0.3%	0.6%	3.5%	1.6%	0.1%	88.4%	2.7%	2.1%	0.6%
Ohio University-Lancaster Campus	3,722	60.6%	0.2%	0.9%	4.9%	2.1%	0.1%	85.5%	3.3%	1.8%	1.2%
Ohio University-Main Campus	34,771	59.6%	0.2%	1.2%	5.3%	2.6%	0.1%	79.6%	2.7%	2.2%	6.1%
Ohio University-Zanesville Campus	3,409	68.9%	0.2%	0.4%	3.8%	1.6%	0.0%	87.3%	3.6%	2.0%	1.1%
University of Toledo	23,343	50.6%	0.2%	2.9%	12.6%	4.1%	0.1%	67.4%	2.2%	3.4%	7.1%
Ursuline College	1,583	89.3%	0.2%	1.3%	23.5%	2.0%	0.0%	65.8%	0.0%	6.1%	1.2%
Total	377,932	56.3%	0.2%	2.9%	11.3%	3.4%	0.1%	70.3%	2.6%	3.2%	6.1%
Total (without Satellite Campuses)	320,455	55.3%	0.2%	3.2%	12.2%	3.5%	0.1%	67.8%	2.6%	3.3%	7.0%

## NE OHIO (GREATER CLEVELAND/AKRON) OHIO K-12 INFORMATION

More than 52,000 high school students saved more than \$120 million on college tuition in Ohio last year due to the College Credit Plus program.

**NE Ohio public and private schools have access to College Credit Plus – earning college credit while in HS through partnerships** with Kent State University, University of Akron, Cleveland State University, Case Western Reserve University, Stark State College, Ashland University, Baldwin Wallace University, John Carroll University, Oberlin College, Walsh University, Notre Dame College, Hiram College, Lake Erie College, Ursuline College, Northeast Ohio Medical University (AKA NEOMED), Cleveland Institute of Art , Cleveland Institute of Music, Cuyahoga Community College, Lorain County Community College, and Lakeland Community College.

(Source: Ohio Department of Higher Education [https://www.ohiohighered.org/content/college\\_credit\\_plus\\_info\\_students\\_families](https://www.ohiohighered.org/content/college_credit_plus_info_students_families))

**Cleveland Clinic offers HS paid internships in Applied Medicine for NE Ohio HS students.** This nine-week, paid internship provides rising high school juniors and seniors who live and attend school in Northeast Ohio with the opportunity to work and learn alongside nationally renowned physicians, researchers, and other health care professionals from Cleveland Clinic in a wide range of medical and clinical specialties. Students develop teamwork and focus on areas including research, innovation, education, and development of better, more efficient ways to achieve quality in patient care.

(Source: Cleveland Clinic <http://civiceducation.clevelandclinic.org/Clinic-Based-Programs/Clinic-Based-Programs/Applied-Medicine.aspx>)

For other Cleveland Clinic world class, school-based programs: <http://civiceducation.clevelandclinic.org/School-Based-Programs/Our-Programs.aspx>)

**There are three world class, school-based programs in the arts and sciences for PK-12 public and private school-age students at University Circle.** NE Ohio students have access to three exceptional community resource programs:

1. **Early Learning Initiative** - creates a vital link between preschool teachers, students, and families, and the collections and live performance resources of University Circle institutions.
2. **Linking Education and Discovery (LEAD)** - provides thousands of K-8 students in Cleveland Metropolitan Schools with engaging and enriching learning experiences through visits to Circle-area museums, gardens, and performing arts institutions.
3. **University Circle Inc.'s Future Connections** – provides an eight week college and career readiness experience for rising high school seniors.

(Source: University Circle Inc. - <http://www.universitycircle.org/learn/education-programs> )

**Coordinated community resources provide parents support for finding high quality child care and pre-school service providers.** Greater Cleveland has made early learning support a priority for the region. Coordinated efforts include:

- » PRE4CLE – helps identify high quality pre-school programs (Source: <http://pre4cle.org/>)
- » Invest In Children – provides resources for schooling, child care, and health care (Source: <http://investinchildren.cuyahogacounty.us/>)
- » Starting Point – helps parents with resources to find in- and out-of-school settings (Source: <http://www.starting-point.org/parents.html>)
- » The Literacy Cooperative – provides resources and support for early through adult literacy (Source: <http://www.literacycooperative.org/index.htm>)

**Top two school districts in Ohio for Performance Index come from Greater Cleveland** – Solon (#1) and Rocky River (#2) were the tops in all of Ohio. Eleven school districts from the Greater Cleveland/Akron area rank among the top 25 in Ohio for Performance Index, a measure of how highly students score on a series of tests at different grade levels.

Rank	District Name	County	Performance Index Score 2016-17
1	Solon	Cuyahoga	111.015
2	Rocky River	Cuyahoga	109.405
7	Beachwood	Cuyahoga	107.374
11	Brecksville-Broadview Heights	Cuyahoga	106.643
15	Bay Village	Cuyahoga	105.255
18	Avon	Lorain	104.515
20	Revere	Summit	104.280
21	Avon Lake	Lorain	104.047
22	Hudson	Summit	104.038
23	Aurora	Portage	103.932
25	Chagrin Falls	Cuyahoga	103.830

(Source: *Cleveland Plain Dealer and Ohio Department of Education*  
[http://www.cleveland.com/datacentral/index.ssf/2017/09/every\\_ohio\\_school\\_district\\_ran.html#chart](http://www.cleveland.com/datacentral/index.ssf/2017/09/every_ohio_school_district_ran.html#chart))

**Solon recognized as best school district in America based on state test scores, college readiness, graduation rates, SAT/ACT scores, teacher quality, public school district ratings, and criteria found here** (Source: <https://about.niche.com/methodology/best-school-districts/>)

(Source: *Niche US Schools rankings* -<https://www.niche.com/k12/search/best-school-districts/>)

### Gifted Education

9 of the top 12 schools in Ohio Department of Education Gifted Education Rankings, 11 of top 20.

- 1 - Westlake
- 2 - Rocky River
- 6 - Mayfield
- 8 - North Canton
- 9 - Independence
- 10 - Hudson
- 11 - North Olmsted
- 12 - Wadsworth
- 18 - Aurora
- 20 - Kenston

(Source: Ohio Department of Education - <http://education.ohio.gov/Topics/School-Improvement/Awards-and-Recognition>)

In addition to excellent public schools, Greater Cleveland/Akron has exceptional private school options. **Private school options recently highlighted by Crain's include:**

- » Beaumont School
- » Cleveland Central Catholic High School
- » Gilmour Academy
- » Hathaway Brown School
- » Hawken School
- » Hershey Montessori School
- » Incarnate Word Academy
- » Joseph and Florence Mandel Jewish Day School (Mandel JDS)
- » Lake Catholic High School
- » Laurel School
- » Montessori High School at University Circle
- » St. Edward High School
- » University School
- » Western Reserve Academy

(Source: Crain's Cleveland Business – <http://www.crainscleveland.com/apps/pbcs.dll/section?Category=CUSTOM24171>)

### **NE Ohio Region Public Schools Recognized as Exemplary by US and Ohio Departments of Education**

(Source Ohio Department of Education - <http://education.ohio.gov/Topics/School-Improvement/Awards-and-Recognition>)

- » **2016 The All A Award is presented by the State Board of Education and recognizes schools that earned straight A's on all of their applicable report card measures.**

Cuyahoga County had the largest number of schools (17). Next closest county was 10 (Hamilton County).

- |   |                                |
|---|--------------------------------|
| Chagrin Falls High School                     | Chagrin Falls Exempted Village |
| Citizens Leadership Academy                   | Cleveland Municipal City       |
| Clark School                                  | Cleveland Municipal City       |
| Cleveland Entrepreneurship Preparatory School | Cleveland Municipal City       |
| Dorothy E Lewis Elementary School             | Solon City                     |
| East Academy                                  | East Academy                   |
| Garfield Heights High School                  | Garfield Heights City          |

Hope Academy Northwest Campus	Hope Academy Northwest Campus
Mayfield High School	Mayfield City
Milkovich Middle School	Maple Heights City
Newton D Baker School	Cleveland Municipal City
North Olmsted Middle School	North Olmsted City
Orange High School	Orange City
Solon High School	Solon City

» **Four of the state's 9 National Blue Ribbon Schools – most of any Ohio region**

Blue Ribbon Schools Program (NCLB-BRS) is a national recognition program, honoring elementary and secondary schools in the United States that make significant progress in closing achievement gaps or whose students achieve at the highest levels in their state. Through this program, the U.S. Department of Education (USDOE) recognizes and presents as models these elementary and secondary schools:

- Grace L. Roxbury Elementary School (Solon City Schools)
- Leighton Elementary School (Aurora City School District)
- Samuel Bissell Elementary School (Twinsburg City School)
- St. Edward High School (Lakewood) (Catholic Diocese of Cleveland)

» **2016 State Superintendent's High Performing School of Honor –**

Akron Public Schools/Akron Early College High School – 1 of 2 in Ohio

» **The Momentum Award is presented by the State Board of Education and recognizes schools for exceeding expectations in student growth for the year.**

Cuyahoga County had 16. Next closest County had 10 schools recognized.

Cuyahoga	Arbor Elementary School	Euclid City
Cuyahoga	Broadway Academy	Broadway Academy
Cuyahoga	Chagrin Falls High School	Chagrin Falls Exempted Village
Cuyahoga	Citizens Leadership Academy	Cleveland Municipal
Cuyahoga	Clark School	Cleveland Municipal
Cuyahoga	Cleveland Entrepreneurship Preparatory School	Cleveland Municipal
Cuyahoga	Dorothy E Lewis Elementary School	Solon City
Cuyahoga	East Academy	East Academy
Cuyahoga	Garfield Heights High School	Garfield Heights City
Cuyahoga	Hope Academy Northwest Campus	Hope Academy Northwest Campus
Cuyahoga	Mayfield High School	Mayfield City
Cuyahoga	Milkovich Middle School	Maple Heights City
Cuyahoga	Newton D Baker School	Cleveland Municipal
Cuyahoga	North Olmsted Middle School	North Olmsted City
Cuyahoga	Orange High School	Orange City
Cuyahoga	Solon High School	Solon City

- » **The U.S. Department of Education Green Ribbon Schools** recognizes schools where staff, students, officials and communities has come together to produce energy efficient, sustainable and healthy school environments and to ensure the sustainability and environmental literacy of graduates. Ohio's designated school is in NE Ohio: Lakewood Catholic Academy, Lakewood, OH

**44 International Baccalaureate World schools in NE Ohio (most in Ohio)** – Next closest region – Central Ohio with nine schools. \*List of schools below

(Source: *Ohio Association of International Baccalaureate schools* <http://www.bexleyib.org/About-Us-1.html>)

**US News & World Report identifies Aurora (#6) and Hudson (#7) high schools in Top 10 Public High Schools in Ohio.**

(Source: <https://www.usnews.com/education/best-high-schools/ohio>)

**NE Ohio Most 2018 National Merit Semi-Finalists in any Ohio region** – Less than 1 percent of U.S. high school seniors become semifinalists due to performance on PSAT/SAT. NE had 186 in 2018 .

Highlighted Schools

Solon HS – 19

Hudson HS –12

Hathaway Brown HS – 10

Cleveland St. Ignatius HS – 9

Strongsville HS – 9

University School – Upper School – 8

Shaker Heights HS – 7

Westlake HS – 7

Arch Bishop Hoban HS – 6

Brecksville HS – 6

Mentor HS – 6

Lake Ridge Academy – 6

Revere HS – 6

Twinsburg HS – 6

(Source: *National Merit Scholarship Foundation -*

<http://www.nationalmerit.org/s/1758/interior.aspx?sid=1758&gid=2&pgid=401>)

\*Northeast Ohio IB Schools

1. Alliance Middle School
2. Campus International High School (CMSD)
3. Kent State University – Diploma Programme
4. Lakewood Catholic Academy
5. Langston Middle (Oberlin)
6. Litchfield Middle School (Akron)
7. Monticello Middle (Cleveland Heights)
8. Oberlin High
9. Roxboro Middle (Cleveland Heights)
10. Shaker Heights High School
11. Shaker Heights Middle School
12. Shaker Heights Woodbury Elementary
13. St. Edward High School
14. St. Joseph Academy
15. Bassett Elementary (Westlake)
16. Boulevard Elementary (Shaker Heights)
17. Campus International (CMSD)
18. Canterbury Elementary (Cleveland Heights)
19. Case Elementary (Akron)
20. Discovery School (Mansfield)
21. Dover Elementary (Westlake)
22. Eastwood Elementary (Oberlin)
23. Fairfax Elementary (Cleveland Heights)
24. Fernway Elementary (Shaker Heights)
25. Hilliard Elementary (Westlake)
26. Holly Lane (Westlake)
27. Indian Trail Elementary (Stow)
28. Kent State University - PYP
29. KSU Child Development Center
30. Lomond Elementary (Shaker Heights)
31. Mercer Elementary (Shaker Heights)
32. Onaway Elementary (Shaker Heights)
33. Prospect Elementary (Oberlin)
34. Roxboro Elementary (Cleveland Heights)
35. Akron Firestone
36. Beaumont School
37. Campus International High School (CMSD)
38. GlenOak High School (Canton)
39. Jackson (Massillon)
40. Montessori at University Circle (Cleveland)
41. Oberlin ES
42. St. Edward (Lakewood)
43. Tri-County International Academy (Wooster)
44. Westlake High School

## CLEVELAND'S PATH TO SAY YES

Say Yes to Education, a leading national nonprofit organization that partners with communities around the goals of college readiness and affordability, announced in May 2017 that a consortium of public and private groups in Cleveland has satisfied some of the earliest milestones on the extensive path to potentially becoming a Say Yes community.

### **Now is the time.**

It is time to align academic and non-academic support services so more Cleveland students are college ready.

It is time for Cleveland's college-ready students to be able to afford post-secondary educational opportunities with tuition scholarships.

It is time to improve educational attainment to bring increased investment and vibrant economic growth to our community.

It is time for Cleveland and Cuyahoga County to become a Say Yes to Education community.

For more than two years, a local exploratory group has been working to secure an affiliation with Say Yes to Education for Cleveland's youth. Six partners – City of Cleveland, Cuyahoga County, Cleveland Metropolitan School District (CMSD), Cleveland Foundation, College Now Greater Cleveland and United Way of Greater Cleveland – are leading the effort. These partners are seeking to make the case that Cleveland would be a good fit for the Say Yes approach, leveraging the ongoing success of the Cleveland Plan, the region's strong history of collaboration as demonstrated by innovative and committed public sector leaders, and an organized and robust philanthropic and nonprofit sector committed to enhancing the lives of all Greater Clevelanders.

### **We've Only Just Begun**

*"If Cleveland is selected as a Say Yes city, it would help us stop decline, stabilize our neighborhoods and ensure growth for the future. We can create an opportunity for Cleveland students, regardless of economic circumstance, to go to college. Say Yes would help support their growth and aid in high-quality educational opportunities for those who traditionally would not have access. This is an excellent example of community partnerships contributing to equitable prosperity for all Clevelanders."*

City of Cleveland Mayor Frank G. Jackson

Cleveland's recent renaissance is the result of collaborative partnerships across our public, private, corporate and philanthropic sectors. Whether it's the renovation of our Public Square as a community gathering place, hosting the Republican National Convention, or the investment in early learning through PRE4CLE and Invest in Children, Clevelanders are committed to working together for the betterment of our community and neighborhoods.

We have made progress, but we need to extend this renaissance throughout our community and to sustain it for generations of future Greater Clevelanders.

Fewer Clevelanders are living in poverty than any time since 2008, but still over one-third of residents live at or below the poverty level, according to most recent U.S. Census report. Half of Cleveland's children live in poverty. Of those children, the U.S. Census notes, almost 60 percent are African-American and 15 percent are Latino or Hispanic. In Ohio, while Cleveland has had the biggest drop in its poverty rate among the state's three biggest cities, the number is still greater than Columbus and Cincinnati.



Though Cleveland slowed its population decline to 2.9 percent between 2010 and 2016, the city's population of 385,809 today is a drop from 477,472 in 2000 (23.8% decline).

The high school graduation rate for CMSD students has improved 17 percentage points in five years (52.2% in 2010 to 69.1% in 2015), but it's still the fifth lowest in the state.

More CMSD students are graduating ready for postsecondary education, earning at least a 3.0 GPA (34% in 2016 vs. 23% in 2011), yet the number of graduates attending college has dropped (51% in 2016 vs. 56% in 2015 and 61% in 2011).

The need to create a game-changing, college-oriented community is critical for the region's long-term success. Educational attainment is an integral component of economic development. Research by the Federal Reserve Bank of Cleveland directly links poor educational attainment to reduced investments and sluggish job and economic growth.

Post-secondary education completion leads to economic revitalization through improved educational outcomes, reduced crime, larger tax base, skilled workforce and higher employment, and residential growth, according to CEOs for Cities.

By 2020, 65 percent of Ohio jobs will require a postsecondary credential, according to a 2016 study by Team NEO. Yet, U.S. Census numbers reveal only 44.5 percent of Cleveland residents (25 years and older) have completed at least some college and only 15.6 percent have completed a bachelor's degree or higher. And we currently have thousands of available jobs in our community, yet we lack the skilled workforce to pursue these family-sustaining careers.

Ohio ranks 45th in the United States for public college affordability (College Affordability Diagnosis report), a dubious distinction that doesn't seem likely to change soon. The Plain Dealer editorial board recently commented on how the latest proposed two-year state budget "fails to move the needle to help qualified but financially struggling college students afford college."

### **We're a Greater Cleveland Only With a Stronger Urban Core**

*"If Say Yes does come to Cleveland, the program will help to deliver on our vision where we live in a region that is vibrant and prosperous, where everyone thrives and all things are possible. The Say Yes opportunity supports our goal of making sure that every student stays in school and has the support needed to graduate high school ready for postsecondary completion and career success."*

Cuyahoga County Executive Armond Budist

Cleveland and Cuyahoga County have exemplified the power of public-private partnerships. Now we have the opportunity to take that collective power and civic pride to a systemic level that will impact generations of Clevelanders.

One of the reasons Say Yes to Education is considering this community is that collaborative spirit and action – and the work already being done to improve education. As Eugene Chasin, chief operating officer of Say Yes, explains: "It's clear to the senior leadership of Say Yes that Cleveland is a community with a fierce desire to give its young people access to higher education, armed with the support to succeed in obtaining a college degree or other postsecondary credential. That is a strong base on which to build."

While the Say Yes theory of action formalizes the systemic change needed to address the root causes of poverty in the City of Cleveland, the long-term effects will be far reaching. In our region, leaders of Cuyahoga County, which spends 35 percent of its \$1 billion-plus budget on social services, already have begun transforming government to ensure its services aren't just delivered but have true impact.

In Erie County, where Say Yes Buffalo operates, the initial impact on the county budget and services is impressive. For example, the county reports 143 fewer children in foster care over a single year – a 42- percent reduction and an estimated \$11.4 million in annual savings – and leaders attribute that reduction in part to the effect of Say Yes in improving social service delivery.

Cuyahoga County, City of Cleveland, and CMSD leaders are committed to working together to align existing support services to more effectively help students achieve the goal of post-secondary completion and career readiness. This is critical given that City of Cleveland residents represent 27 percent of the total population of Cuyahoga County but their need for county-provided support services is much greater. Uniting to make the urban core stronger makes for a stronger county.

### **We're Already Transforming Education**

*"Under the Cleveland Plan, CMSD is graduating more students, and students who are better prepared for college; however, the number of Cleveland students enrolling in postsecondary education is declining. If we succeed in being selected, Say Yes can help Cleveland reverse that trend through scholarship access and support services students need from kindergarten through 12th grade. The potential of Say Yes provides hope and opportunity for the people of Cleveland to play a significant role in the revitalization of the city and the region."*

Cleveland Metropolitan School District CEO Eric Gordon

Cleveland's Plan for Transforming Schools (the Cleveland Plan) was the 2012 outcome of a collaborative initiative bringing together CMSD, civic leaders, the business and philanthropic communities as well as charter school representatives.

The Cleveland Plan encompasses an emerging national model that embraces city-wide choices and options for all families, school autonomy, student-based budgeting, external support, talent-seeking strategy, extensive public engagement, and performance-based accountability for all schools. The goal is to work in partnership to create dramatic student achievement gains for every child.

To ensure the plan's fidelity, the Cleveland Transformation Alliance, a public-private partnership, was created to assess the quality of all Cleveland schools, communicate with parents on quality school choices and serve as a watchdog for charter sector growth.

A few months prior to the Cleveland Plan launch, civic leaders, educators and higher education presidents came together to develop a plan to increase the number of youth attending and graduating from college. The group recommended aligning efforts to increase college readiness, access and persistence, in order to establish and achieve measurable improvement goals for student progression, which resulted in the formation of the Higher Education Compact of Greater Cleveland.

Progress is being made. The 2015-16 school year saw the second consecutive enrollment gain for CMSD, with 39,125 students enrolled in district schools, up from 38,555 in 2014-15 and 37,967 in 2013-14. These gains suggest that the district has stopped its decades-long enrollment decline.

And in five newly-redesigned CMSD career academies, nearly 2,000 students are actively learning the skills needed to be a part of 18 industries, including health care, manufacturing and information technology.

As noted earlier, the high school graduation rate has improved by 17 percentage points in five years. Since 2010, CMSD's graduation rate has been rising faster than that of any other urban district in Ohio, and CMSD has narrowed the gap between its rate and the state average by 10 percentage points.

Just between 2015 and 2016, CMSD students graduating with a 3.0 GPA or higher rose from 30 percent to 34 percent. The six-year college completion rate also grew from 35 percent in 2015 to 47 percent in 2016. The three-year community college graduation rate rose slightly, from 5 percent in 2015 to 6 percent in 2016, while transfers from two- to four-year schools went from 12 percent in 2015 to 13 percent in 2016.

K-12 academic improvements, however, are only one component of the work being done to promote long-term academic success. Cuyahoga County has been a lead investor for over a decade in preparing young children for success in kindergarten, the first of Say Yes to Education's 14 pathway milestones. Formed as part of the Cleveland Plan, PRE4CLE, which partners closely with the county's Invest in Children initiative, brings together CMSD and over 30 community and corporate organizations to ensure every 3- and 4-year-old child in Cleveland has access to high-quality preschools.

Since PRE4CLE began in 2014, 2,350 high quality preschool seats have been created in the city of Cleveland. Championing the need to expand access to high quality early learning, Cuyahoga County Executive Armond Budish with the approval of County Council made an additional \$10 million investment in the county's existing Universal Pre K program that was matched with \$13 million by corporate and philanthropic leaders. UPK programs provide the highest quality preschool services and tuition scholarships. With this new investment, the total number of seats in UPK has increased by 2,600 to 4,600, including 2,539 within the city of Cleveland.

Non-academic or social services also are critical to the all-encompassing support required for students to matriculate. Early work to address this fundamental component of college readiness and success began with a partnership between CMSD and United Way of Greater Cleveland to wrap social service support around students in 25 local schools. As the largest funder and provider of health and human services in the region, the county is taking the lead to align the funding and delivery of social services with our community's education and career-readiness goals, which also is at the heart of the Say Yes model.

### **We're Ready for Say Yes to Education**

*"We see tremendous value in Say Yes as a comprehensive program that has the potential to lift generations of students and families out of poverty and instill a new era of hope and prosperity in our community. The potential of a college scholarship is a key incentive, but the holistic and individualized care for our students from pre-K through 12th grade will cause a seismic opportunity shift in Greater Cleveland if we are selected as a Say Yes community."*

Cleveland Foundation President and CEO Ronn Richard

In 1987, Say Yes to Education was founded by philanthropist George Weiss with a bold promise to 112 sixth graders at a Philadelphia public school: he would pay to send them to college if they graduated high school, and provide them with the support services to seize that opportunity. Since then, Say Yes has evolved into a national nonprofit that galvanizes entire communities around the goal of every public school student not only graduating high school – but doing so prepared for a postsecondary education and with the ability to afford it.

More than 130,000 students nationally have access to scholarships and/or other services from Say Yes, and more than 10,000 students have gone to college or other postsecondary programs with support from the organization and its partners.

Using postsecondary scholarships as a catalyst, Say Yes partners with communities to create systems and structures intended to help every child progress along the pathway to postsecondary success. Its approach encompasses several other critical elements that are common across all Say Yes partner communities:

- » Collaborative governance
- » Comprehensive academic and non-academic support services, offered at scale
- » Committed investment
- » Strategic analysis of data
- » Provisions for sustainability – sufficient to withstand predictable transitions in leadership, and historically unpredictable funding from state and local sources

Grantmakers for Education succinctly explains what Say Yes does: “When Say Yes enters a city, it brings \$15 million in start-up capital (to create the collaborative governance/infrastructure and assist in the implementation and coordination of necessary services and supports), helps to establish and administer a robust citywide scholarship endowment (although the funds for the endowment are the responsibility of the local community), and provides students access to its growing network of private partner colleges. Together, these early and ongoing incentives unite community entities around collectively defined outcomes related to postsecondary access and attainment. Say Yes then acts as a facilitator and provides technical support as cities build a sustainable civic infrastructure to deliver wraparound services, a hallmark of its program, aimed at expanding learning opportunities and addressing social and emotional factors.”<sup>1</sup>

The Say Yes Theory of Action is linear in its approach. The investment of seed capital and the creation of the scholarship incentive leverage the establishment of a governance model across sectors and a new approach to the use of data. Those efforts, in turn, drive a strategic reallocation of resources that make possible the alignment and creation of support services – all pointed toward the goal of increasing postsecondary readiness.

In addition to scholarships to in-state public colleges and universities provided by the local Say Yes partnerships, high school graduates in Say Yes communities also have access to income-based scholarships from the more than 100 private colleges and universities in the Say Yes Higher Education Compact. These include the eight members of the Ivy League, as well as Duke, MIT, Northwestern, University of Notre Dame, Stanford, and Denison University, Oberlin College and Kenyon College in Ohio (a list that is expected to grow in the coming months).

Business and higher education leaders are an integral component of Say Yes success. In Buffalo, the Community Leadership Council, which monitors and facilitates progress, includes over 60 leaders, including those representing city and county government; the school district; parents; teachers; businesses; unions, and philanthropic and faith-based organizations. On the national level, the Say Yes to Education board of directors draws on expertise from the research, business and entrepreneurial private sectors. Among its members are George Weiss, its founder and chairman; Margot James Copeland, KeyBank executive vice president and director of philanthropy and civic engagement; Joel Greenblatt, managing partner of Gotham Capital; and Naeemah Nelson, global innovation manager at GE Ventures. The full list of members of the Say Yes board of directors, and board of advisers can be found at <http://sayyestoeducation.org/about/team/?role=advisory-board>.

<sup>1</sup> [https://www.edfunders.org/sites/default/files/GFE\\_Case%20Study%209.final\\_.pdf](https://www.edfunders.org/sites/default/files/GFE_Case%20Study%209.final_.pdf)

## **We Recognize the Potential Impact**

*"Say Yes would be a game-changer for many of the students we serve, freeing them from much of the worry about how their families will finance the gap between the cost of postsecondary education and what they can afford to pay for it. Additionally, the wraparound services that Say Yes would provide for students will allow them to focus more on academics and give them the tools they need to persist to high school and postsecondary completion."*

College Now Greater Cleveland CEO Lee Friedman

College and other postsecondary education attainment make a world of difference in a community. As CEOs for Cities Talent Dividend reveals, 58 percent of any city's success as measured by per-capita income can be explained by percentage of college graduates in its population. Its research also reveals that increasing the four-year college attainment rate by just 1 percent in each of the 51 largest U.S. metro areas would be associated with a \$124 billion increase in aggregate annual personal income.

In Buffalo, where Say Yes launched in late 2011, the first 3,000 students enrolled in college are expected to spend an additional \$116 million a year and \$2.3 billion in their lifetime, assuming a 60 percent graduation rate for four-year-degree students and 40 percent graduation rate for two-year-degree students. (Buffalo is the most comparable Say Yes city to Cleveland, with a similar student population and challenges.)

By increasing the number of Buffalo adults with four-year degrees from 24.4 percent to the state average of 33.2 percent, disposable income in Western New York will be boosted by \$1.7 billion annually.

The Buffalo community has worked hard through its Say Yes partnership since late 2011 to implement academic and non-academic support services to help children from pre-K into college. Its progress includes:

- » 100 percent of school buildings with extended day learning opportunities
- » 100 percent of school buildings with a postsecondary planning system
- » 100 percent of school buildings with family support specialists
- » 52 school-based mental health clinics (mobile health clinics are now being implemented)
- » Five school-based civil legal clinics
- » 55 sites offering summer camps through partnerships with 42 community-based service providers
- » Summer academies to help high school graduates transition to college

Though the first scholarship-eligible students are only now graduating after completing a four-year degree in 2017, the results so far have been significant:

- » Every dollar committed by Say Yes returned \$15.11 in student support
- » \$2.6 million awarded in Say Yes scholarships to students graduating high school in 2013 and 2014 yielded \$21.5 million in combined public and private scholarship aid
- » High school graduation rate increased 15 percentage points (49% in 2012 vs. 64% in 2016)
- » Postsecondary matriculation increased 10 percentage points (57% in 2012 vs. 67% in 2016)
- » Public school enrollment is increasing every year since launch following 12 years of decline

The results in Buffalo demonstrate the potential impact a game changer like Say Yes could have on the work already being done to improve education for Cleveland students.

## **We Know the Work Must Continue**

*"We know it takes a village to ensure our community's kids have everything they need to succeed academically and ultimately pursue higher education. If Cleveland is successful in becoming a partner community with Say Yes, we are excited about the opportunity to wrap holistic services – everything from tutoring to health care – to elementary, middle and high school students. Say Yes is an innovative strategy that will create new excitement about education in our community."*

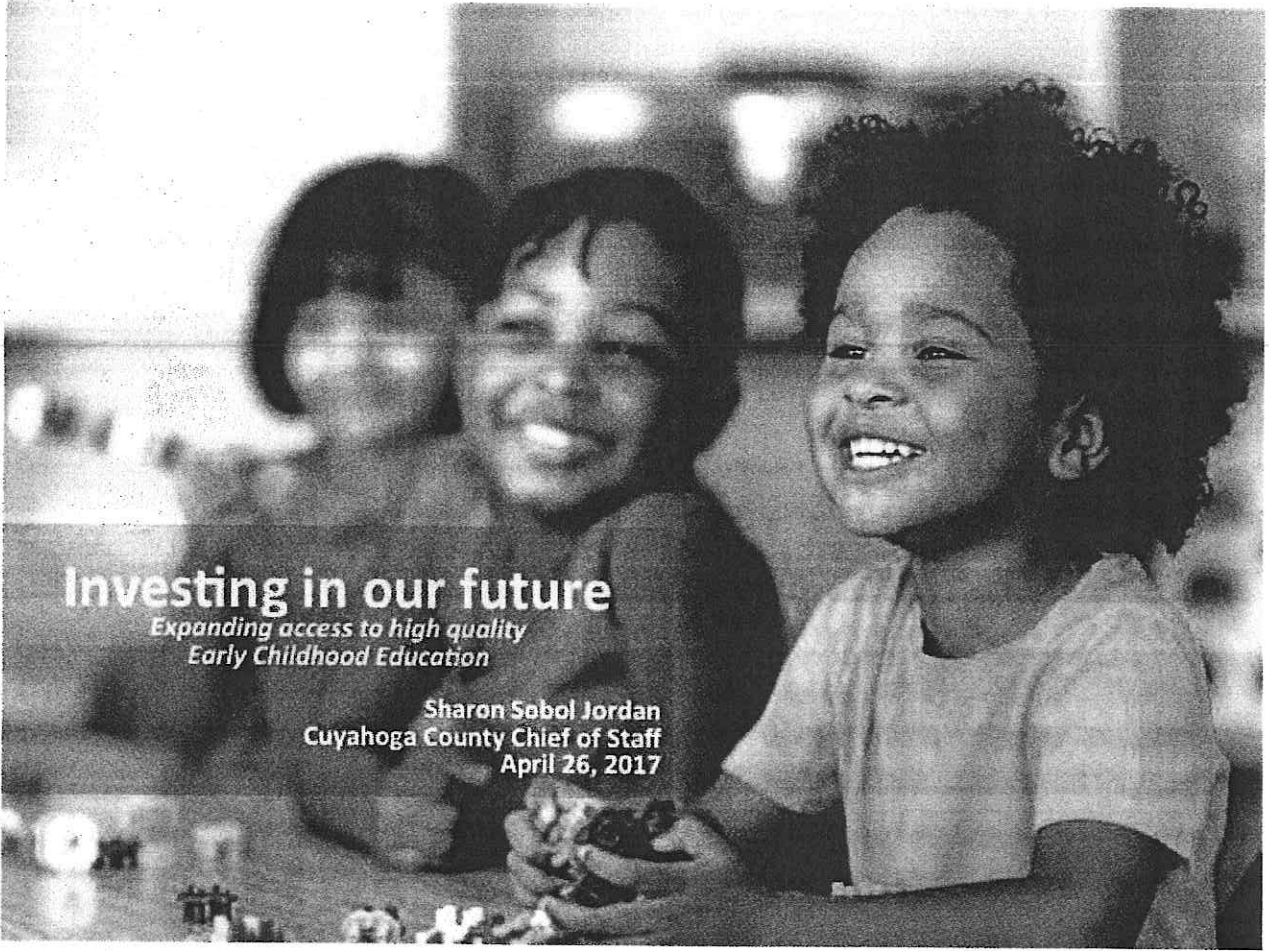
United Way of Greater Cleveland President and CEO August Napoli

Cleveland's opportunity is now. Over the next 12 to 18 months, the community must continue to pull together to put our best foot forward to become a Say Yes city, and most important, change the trajectory of the lives of Cleveland children and their families.

Among the work ahead of us:

- » Identifying the scholarship criteria
- » Securing memos of understanding between Say Yes and local entities and executing data-sharing agreements
- » Mapping the inventory of academic and non-academic support services available in Cleveland
- » Setting the scholarship endowment amount based on scholarship criteria data
- » Raising 60 percent of the endowment
- » Communicating the opportunity and potential impact of Say Yes for Cleveland

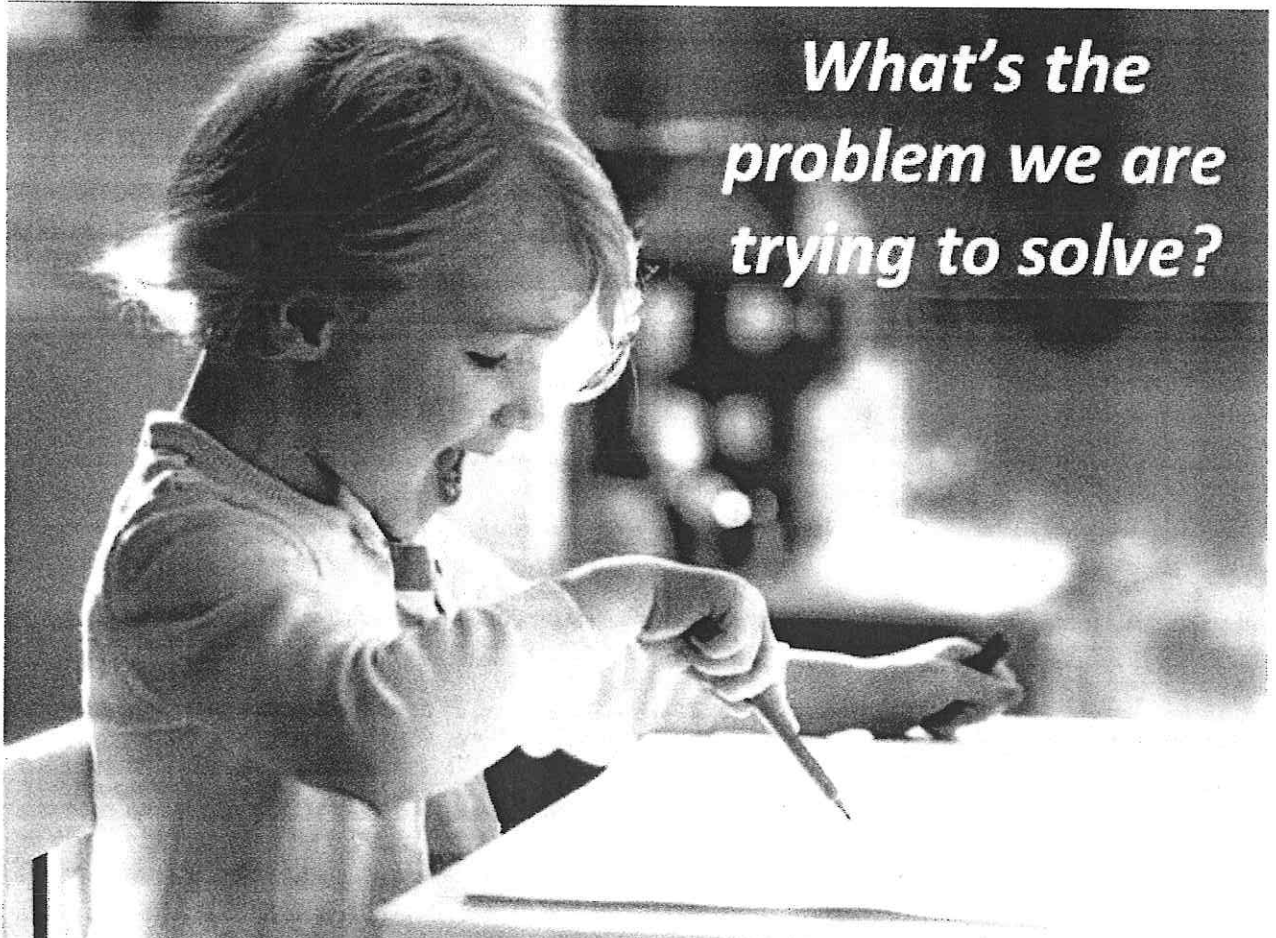
To become the fourth Say Yes city in the United States requires Cleveland to dig deep, expand our collaborative efforts, and strengthen our commitment to the future of our children, and ultimately the city and region.



## **Investing in our future**

*Expanding access to high quality  
Early Childhood Education*

**Sharon Sobol Jordan**  
Cuyahoga County Chief of Staff  
April 26, 2017



***What's the  
problem we are  
trying to solve?***

Reduces the ability to respond, learn, or figure things out, which can result in problems in school.

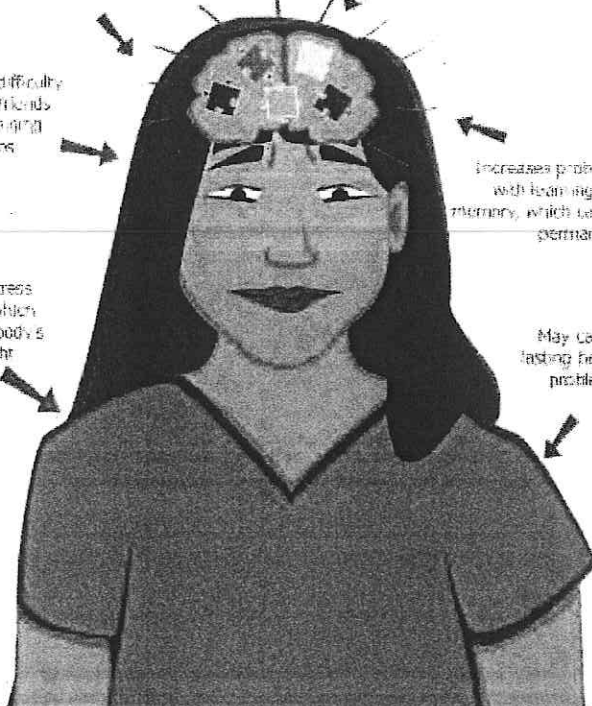
Lowers tolerance for stress, which can result in behaviors such as fighting, checking out, or defiance.

Increases difficulty in making friends and maintaining relationships.

Increases problems with learning and memory, which can be permanent.

Increases stress hormones which affects the body's ability to fight infection.

May cause lasting health problems.



**A Survival Mode Response** to toxic stress increases a child's heart rate, blood pressure, breathing and muscle tension. Their thinking brain is knocked off-line. Self-protection is their priority. In other words:  
"I can't hear you! I can't respond to you! I am just trying to be safe!"

**Adverse Childhood Experiences can include:**

1. Emotional abuse
2. Physical abuse
3. Sexual abuse
4. Emotional neglect
5. Physical neglect
6. Mother treated violently
7. Household substance abuse
8. Household mental illness
9. Parental separation or divorce
10. Incarcerated household member
11. Bullying (by another child or adult)
12. Witnessing violence outside the home
13. Witness a brother or sister being abused
14. Racism, sexism, or any other form of discrimination
15. Being homeless
16. Natural disasters and war

**Exposure to childhood ACEs can increase the risk of:**

- Adolescent pregnancy
- Alcoholism and alcohol abuse
- Depression
- Illicit drug use
- Heart disease
- Liver disease
- Multiple sexual partners
- Intimate partner violence
- Sexually transmitted diseases (STDs)
- Smoking
- Suicide attempts
- Unintended pregnancies

**PRESENTING  
THE HECKMAN EQUATION**

<b>INVEST</b>	in early education for disadvantaged children
<b>+ DEVELOP</b>	cognitive skills, social abilities and healthy behaviors early
<b>+ SUSTAIN</b>	early development with effective education through to adulthood
<b>= GAIN</b>	a more capable and productive workforce

LEARN MORE ABOUT THE BENEFITS OF  
QUALITY EARLY CHILDHOOD EDUCATION AT [HECKMANEQUATION.ORG](http://HECKMANEQUATION.ORG)

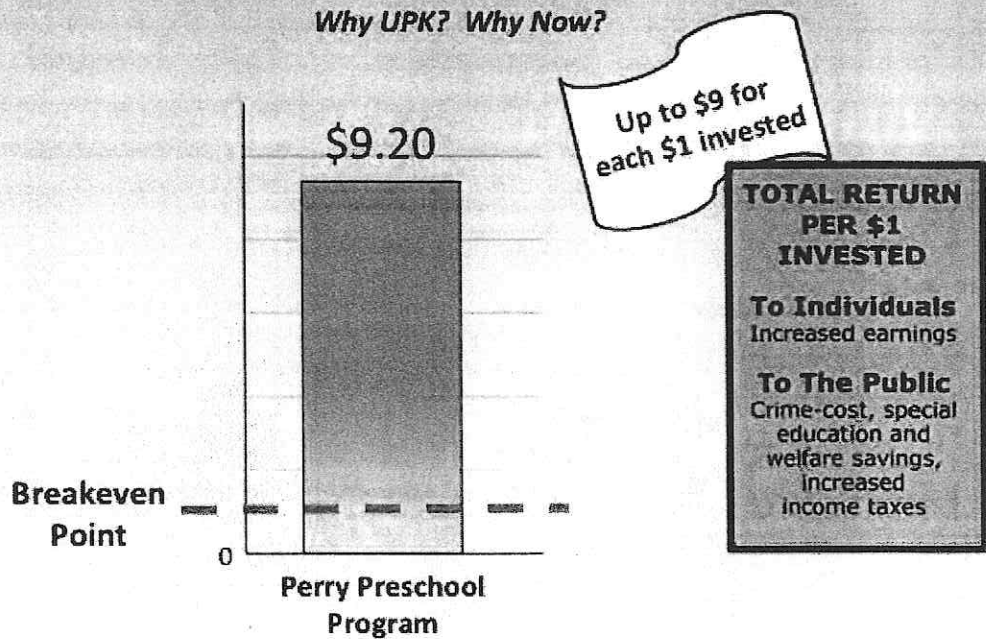




*Magic Bullet?*

## INVESTING IN OUR FUTURE

*Why UPK? Why Now?*



**Proven Return On Every Dollar Invested**

# INVESTING IN OUR FUTURE

*Why UPK? Why Now?*

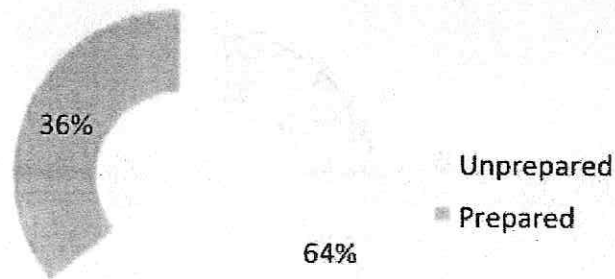


Our community can't afford to wait

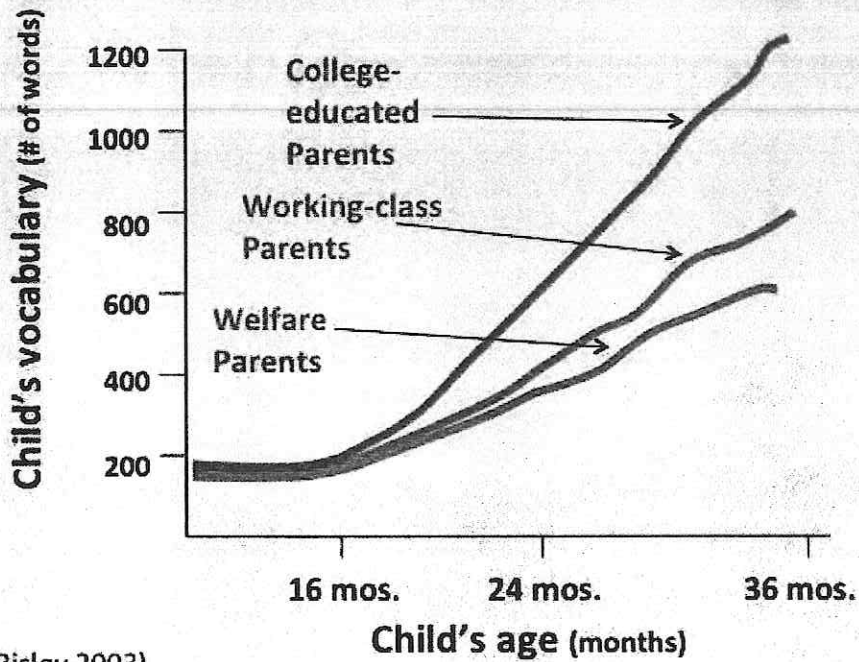
# INVESTING IN OUR FUTURE

*Why UPK? Why Now?*

**2/3** unprepared for kindergarten

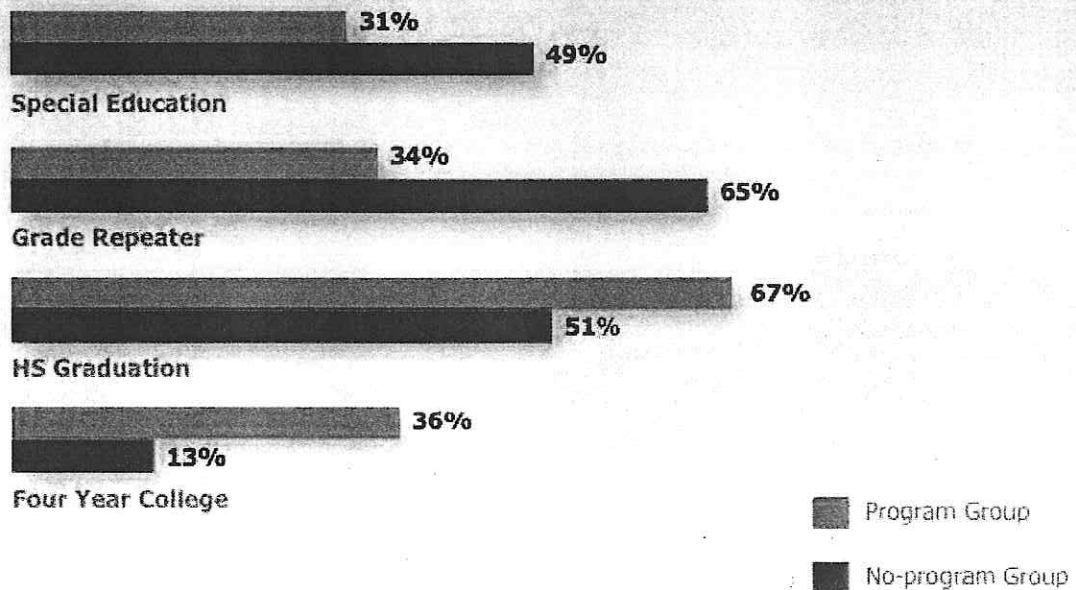


## Low-income children fall behind by 18 months



(Hart and Risley 2003)

## Early Childhood Investment Pay Off: Educational + Social Gains



## 4 Times More Likely To Graduate



If children read at grade level by third grade, they are 4 times more likely to graduate from high school.

In Cuyahoga County, every 1 point increase in the K "test" increases by 12% the odds of passing the Ohio 3<sup>rd</sup>-grade reading test.



### Lower Rates of:

- heart disease
- hypertension
- obesity

# Invest in Children

Cuyahoga County

Universal  
Pre-Kindergarten

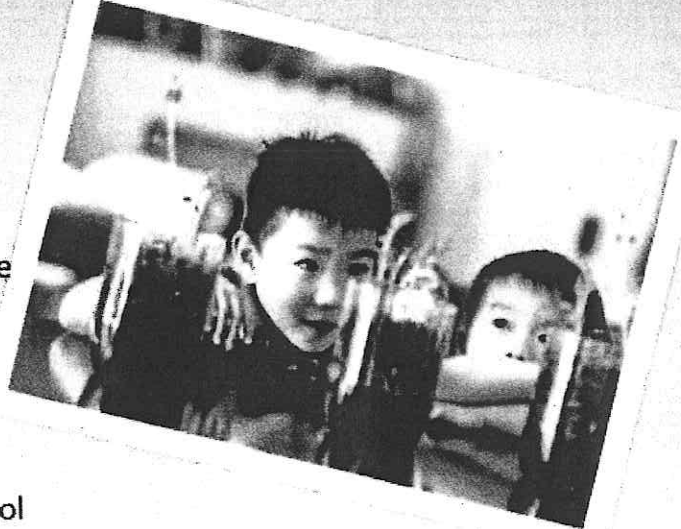


## INVESTING IN OUR FUTURE

*Building on Our Strengths*

### Proven Results

- Children are **30%** more likely to pass 3rd grade reading proficiency
- Greatest impact on low-income children - **55%** academic growth in 1 year
- **80%** in joint UPK/PRE4CLE programs show positive school readiness

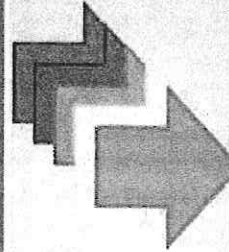


# INVESTING IN OUR FUTURE

*Goals for UPK 2.0*

## Strategies

Highest need kids  
Quality only  
Fund what works  
Public-Private  
Affordable



## Goals

Close the Gap  
Reduce related costs  
Strengthen workforce  
Strengthen economy

## Implementation Timeline

2016

Maximize  
Current UPK  
Enrollment

2016-2017

Finalize Model  
Improvements

Fall 2017

Launch New  
UPK 2.0 Seats

2017-2020

Full Program  
Implementation

2020

Evaluation  
+  
Sustainability

<b>UPK 2.0</b>	<b>2016-2020 Cost</b>
Family Tuition Assistance <sup>1</sup>	\$7,300,000
Classroom Expansion/Quality Enhancement	\$9,700,000
Training/Technical Assistance/MIS	\$2,500,000
Evaluation and Administration	\$1,095,000
<b>TOTAL INVESTMENT NEEDED</b>	<b>\$20,595,000</b>

<sup>1</sup> Includes conversion of half-day to full-day seats to support working families and family tuition scholarships

## **Current County Early Learning Investments**

<b>Current Annual Investments</b>	<b>\$9 million</b>
<b>Cumulative 2016-2020</b>	<b>\$45 million</b>
<b>New UPK Funding</b>	<b>\$10 million</b>



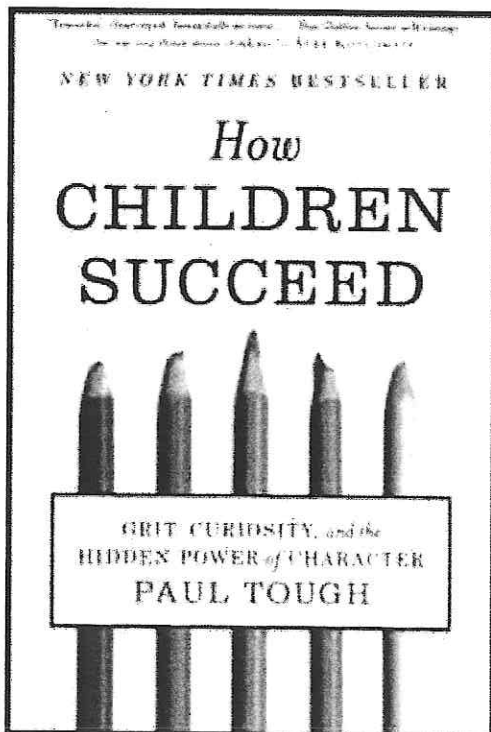
*Who do we need to convince?*



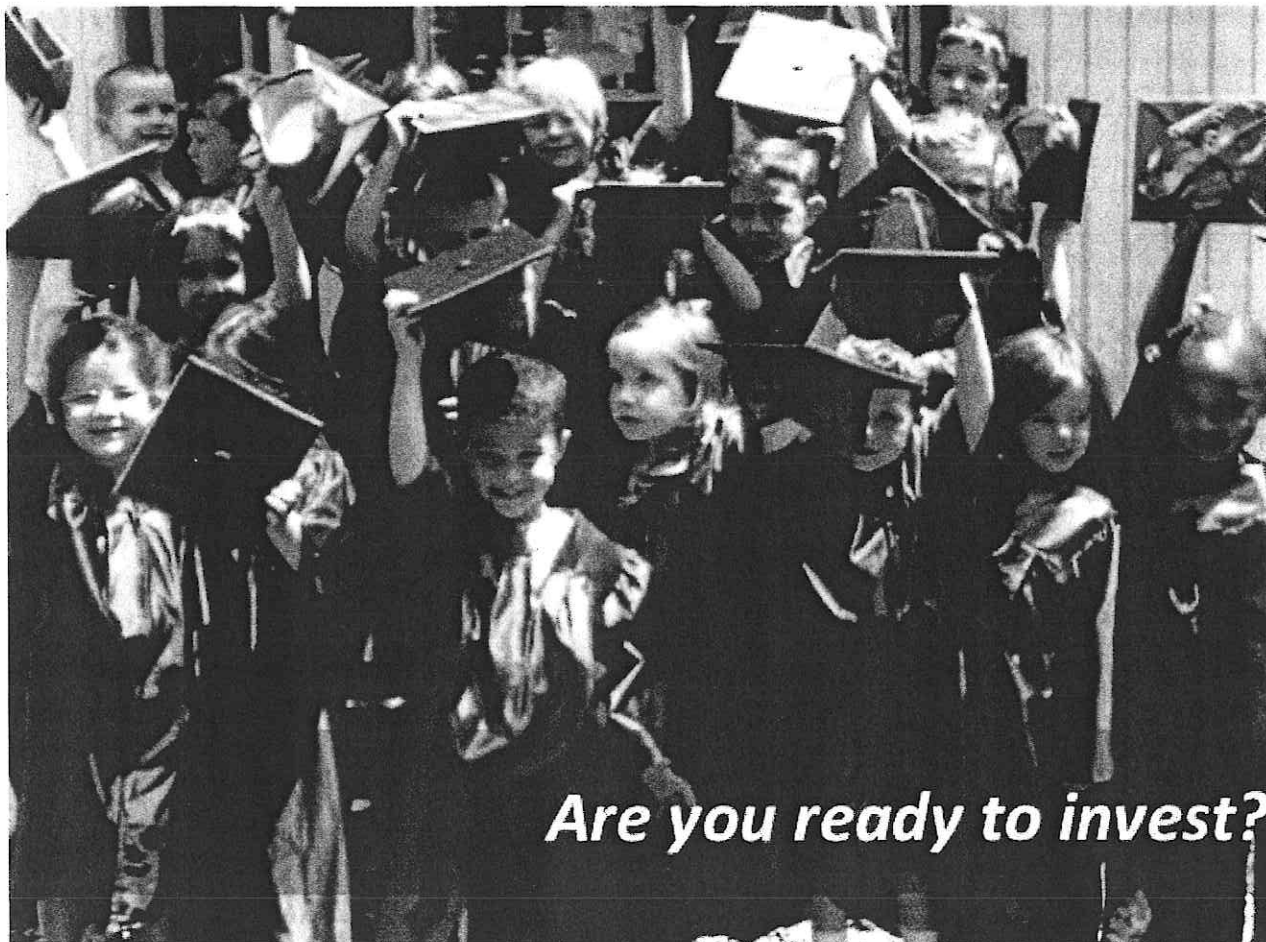




## Parents are the Game Changer



**Regular good parenting  
in the early years  
can make a profound  
difference  
in a child's future  
prospects**



*Are you ready to invest?*



# LOGISTICS AND TRANSPORTATION

# LOGISTICS & TRANSPORTATION



**Location. Location. Location. Cleveland is ideally situated for any corporate headquarters.**

The Great Lakes region spurred the industrial revolution and drove the growth and development of the industrial midwest. Cleveland was at the forefront then, as the 5th largest city in the United States. This is where Rockefeller earned his fortune.

Furthermore, the opening of the St. Lawrence Seaway in 1959 established the Great Lakes region as an economic powerhouse. According to the Brookings Institution, if it stood alone as a country, the Great Lakes economy would be one of the largest on earth.

Thus, on the shores of Lake Erie, Cleveland will lead the second revolution, the one where technology, manufacturing and logistics intersect. From a transportation vantage, Cleveland is the best location in the nation.

**Cleveland is within a day's drive or about an hour's flight to nearly half of the United State's population and 36 percent of Canada's population.** The region is home to 20 *Fortune* 1000 companies.<sup>1</sup> Nearly 60 percent of U.S. *Fortune* 500 headquarters and nine (9) of 11 Canadian "Global 500" companies can be reached in less than a day by car.<sup>2</sup>

Choosing Cleveland provides optimal distance and distribution coverage from both coasts—including easy access to Canada's most populous city, Toronto (the fourth largest in North America).<sup>3</sup> Major cities on the east or west coasts, such as Boston, are not optimally located and do not provide balanced access to the U.S. population. A variety of flights fly nonstop to the area, including the coasts and specifically Seattle, New York and Washington DC.

Cleveland is served by a robust public transit system which includes buses, trolleys, rail, express bus service, and more! A system of bike trails help cyclists navigate the region, connecting adjacent communities to Downtown and the north coast of the lake. Downtown Cleveland is adding trails to connect a network of world class parks, and inviting new housing complexes, restaurants, and retailers to make Downtown their home. Those without a car can rideshare, rent a bike, or walk (Downtown is incredibly walkable).

The city is enjoying the benefits of billions of dollars in new development and improvements. **Over the next 20 years, the region will invest \$15.8 billion in transportation improvements alone.**

<sup>1</sup> Major Institutions – 45 Minute Drive Time and Major Institutions - Downtown Cleveland Maps

<sup>2</sup> Regional Proximity - 8 Hour Drive Time Map

<sup>3</sup> Population Coverage – Proposed Cleveland HQ Map

## AIR TRAVEL IN CLEVELAND

Air travel is convenient and easy to navigate. The average travel time to Cleveland Hopkins International Airport (CLE) on the city's west side is only 20 minutes—besting nearby cities like Pittsburgh and Detroit by 5-10 minutes. CLE has many direct flights, including to and from most cities including Seattle, San Francisco, New York, and Washington, D.C. Comparatively, neighboring Columbus and Pittsburgh have NO direct flights to and from Seattle. The average airfare in Cleveland is \$355, well below cities like Cincinnati, Columbus, and Detroit whose average costs are above \$385.

Additionally, Burke Lakefront Airport (BKL) is located in Downtown Cleveland and provides easy access for business travelers and private aircraft. For those who choose to live in Cleveland's southern suburbs, access is equally as easy to Akron-Canton Airport (CAK), which like Hopkins has many direct flights and is only a mere 50 miles from Downtown Cleveland.

## HIGHWAY SYSTEM IN CLEVELAND

The roadway system was initially designed for a much larger centralized population, with the ability to easily absorb an additional million people region wide. The area is home to 10,978 miles of interstate, arterial and local roads. Included is Interstate 90 through Downtown Cleveland, the longest interstate in the U.S. connecting Seattle and Boston, and Interstate 80 that connects San Francisco and New York City. Cleveland and Chicago are the only two major cities that can access both I-80 and I-90, which go right through downtown Cleveland.

### Commuting by Car

Cleveland enjoys a robust road network with some of the shortest commute times in the U.S.<sup>4</sup> Clevelanders spend by far the fewest annual peak hours wasted in congestion. **Cleveland ranks 65th on INRIX's Global Traffic Scorecard for worst congestion.** Clevelanders spend less than half the amount of time sitting in congestion as those in Detroit, Pittsburgh or Nashville, who are ranked in the top 25 for worst congested cities. In Boston, Chicago or Seattle, you'll sit in traffic three-and-a-half times longer, as they rank in the top 10 for worst congestion!

The morning and evening "rush hours" in the area last only 1.5 hours—much less than those of other metro areas. During peak hours, the average driver is delayed only three to four minutes longer than a typical commute.

## PUBLIC TRANSIT IN CLEVELAND

Public transportation is a great option for locals and visitors alike.<sup>5</sup> Cleveland has long been a trailblazer in the realm of public transportation and was the FIRST to connect an international airport to a city's Downtown by rail. Additionally, downtown Cleveland's Union Terminal is part of the Tower City complex, which includes the iconic Terminal Tower giving immediate access to all transit services. Amtrak passenger trains are also accessed downtown, a few blocks away.

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<sup>4</sup> Highway Connectivity – 90 Minute Drive Time Map

<sup>5</sup> Population Coverage – Proposed Cleveland HQ Map

Transit is an important aspect of Cleveland's transportation network, and choices are vital to the health and vibrancy of the region. Public transit options reduce congestion, reduce personal transportation costs, and make for cleaner air. It is also key to Cleveland's ability to provide job access that benefits both employers and employees alike.

**Clevelanders enjoy the largest transit network in the state of Ohio, larger than the rest of the state combined—and one of the largest in the United States.** Included in this robust system is light rail, heavy rail, bus, Bus Rapid Transit (BRT), trolley, water taxi and more!

Cleveland's network of heavy rail is the largest of any city its size and provides over 6 million trips each year.<sup>6</sup> The city is a leader in Bus Rapid Transit (BRT) providing over 5 million trips and is the fourth largest in the nation. Cleveland's BRT received the highest ranking of "silver" from the Institute for Transportation and Development Policy, one of only two U.S. cities to do so while none received gold. In 2013, the international organization ITDP awarded the Cleveland Healthline the best BRT award in the country.

Access to transit is equally robust. In the metro area, 1.3 million residents walk less than half a mile, or drive five miles or less, to access transit services.<sup>7</sup> Cleveland provides more than 50 million transit trips each year, nearly doubling the number of trips provided by competing cities like Detroit and Charlotte. And Cleveland provides more trips than all other Ohio cities combined, including both Columbus and Cincinnati.

### **Future Transit**

The future of transit—particularly rail—is bright. Under a recent plan by the Northeast Ohio Areawide Coordinating Agency (NOACA), which is the metropolitan planning organization for greater Cleveland, **a future rail network expansion could more than triple capacity.** As part of this visionary plan, the current 37 miles of rail will expand to 111 miles, and the number of stations will increase from 50 to 162.<sup>8</sup> This will make the current system one that can grow with new or expanding businesses.

In addition, NOACA has completed a Transit Oriented Development (TOD) plan to increase ridership and promote development around transit. This plan promotes a mixture of housing, retail, services, workplaces, and open space within walking distance of transit. TOD is most important in providing job access by connecting to existing facilities. Local agencies are actively working to develop sites that will offer thousands of new housing units and mixed-use developments within 2.5 miles of downtown Cleveland. Although Greater Cleveland already has a rich history of development near transit, this plan shows that the region is using it as a tool to influence future development.

### **ACTIVE TRANSPORTATION IN CLEVELAND (Biking & Walking)**

Active transportation (biking and walking) is another important piece of the transportation system, where transportation and health outcomes are linked. And greater Cleveland has great facilities throughout.

**The region currently enjoys more than 860 miles of trails and other facilities for biking and walking.**<sup>9</sup> Additionally, many hundreds of miles are planned.

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<sup>6</sup> Walk Accessibility to Rail Stations Map

<sup>7</sup> Drive Accessibility to Park N Ride Locations Map

<sup>8</sup> Proposed Future Rail Lines Map

<sup>9</sup> Bicycle Network Map

Cleveland's bicycle commute rate is more than double the state average and has increased 238 percent since 2000. Cleveland is ranked seventh among U.S. cities where bicycle commuting is growing the fastest.

In addition to bicycle-specific facilities, bicycling has been increasingly integrated with transit in the Cleveland area. As early as the 1990's, the region's transit authority instituted a program which allows bicyclists to load their bike onto a rack located on the front bumper of every bus. This progressive innovation made GCRTA a national leader as one of the first transit systems to add bike racks. Bicycles are also allowed on Bus Rapid Transit (BRT) buses and trains.

In 2016, a bike share program was launched in the City of Cleveland, expanding easy access to bicycles by tourists and commuters alike. The city's bike share system includes 250 bikes at 29 fixed stations and seven "drop zones."<sup>10</sup>

Downtown Cleveland is compact and extremely walkable, boasting wide, human-scale sidewalks.<sup>11</sup> **Downtown's "Walk Score" is 91** – making it a "walker's paradise" in which daily errands do not require a car. This designation is the highest awarded by Walk Score. Cleveland has several other neighborhoods that also receive high rankings for most or all daily errands being within a walkable distance.

**PROXIMITY TO MAJOR ATTRACTIONS, ENTERTAINMENT & DINING IN CLEVELAND** Cleveland is home to many notable amusement parks, restaurants, art galleries, museums, sporting venues, theatres, beaches, casinos, shopping, and more—all accessible by foot, bike, bus, train or car!<sup>12</sup> Notable venues and attractions within a short distance of Downtown Cleveland's Tower City Union Terminal include:

- » **Cleveland Museum of Art** (5 miles, 15 minutes by transit (BRT) or bikeride) – The #2 museum in the nation as ranked by Business Insider in 2016.
- » **Playhouse Square** (less than one mile, 15 minute walk or 5 minute by transit (trolley ride) – The largest performing arts center in the United States outside of New York City.
- » **Rock and Roll Hall of Fame** (1.1 miles, 20 minute walk or 7 minutes by transit Waterfront Line Light Rail) – Since its opening in 1995 the Rock and Roll Hall of Fame has had more than 10 million visitors
- » **Professional Sports Venues** (all less than .7 miles and 10 minute walk) – Downtown Cleveland is home to three professional sports franchises, all of which make their homes Downtown.
- » **Cedar Point Amusement Park** (63 miles, 70 minute drive) – Consistently ranked as a top amusement park in the world.
- » **Pro Football Hall of Fame** (57 miles, 70 minute drive) – Recognized worldwide as America's premier sports Hall of Fame, it is an exhilarating museum and attraction.

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<sup>10</sup> Bicycle Coverage Downtown Cleveland Map

<sup>11</sup> Sidewalk Coverage Downtown Cleveland Map

<sup>12</sup> Entertainment Options – 90 Minute Drive Time, Entertainment Options Downtown Cleveland, and Major Attractions – 90 Minute Drive Time

## MOVING FREIGHT IN CLEVELAND

Greater Cleveland offers easy access to all forms of freight movement, making shipping efficient and inexpensive.<sup>13</sup> Over 300 million tons of goods were shipped into, out of, and through the region in 2015. Two major north-south interstates and one east-west interstate are located in Downtown Cleveland, with a second east-west route just twenty minutes away. These interstates as well as main arterials experience some of the lowest congestion levels in the country, helping businesses reliably plan goods movement and keep costs down.

Cleveland Hopkins International Airport offers cargo service to all major metros for time-sensitive shipping. **The Port of Cleveland is also located Downtown and provides the only direct, scheduled containerized shipping service to Europe from the Great Lakes.** This route helps businesses reduce the costs of driving and avoid the regular congestion at east coast ports. CSX and Norfolk Southern both have railyards within 20 minutes of Downtown.

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<sup>13</sup> Freight Network Map



## FACTS ABOUT THE GREATER CLEVELAND REGIONAL TRANSIT AUTHORITY (RTA)

**Mission:** To provide safe, reliable, clean and courteous public transportation.

RTA is a highly recognized large multi-modal transit system that operates Heavy Rail, Light Rail, BRT, Bus, Park-N-Ride, Paratransit and Van Pool service for up to 200,000 customers on a typical weekday, or approximately 45 million customers served annually.

Approximately 60% of RTA service is to connect workers with jobs. Over 800 employers are members of RTA's "Commuter Advantage" program wherein they provide a pre-tax transit benefit to their employees, while RTA provides a "Guaranteed Ride Home" to participants.

RTA, winner of the Lexus World Class Customer Service Award, prides itself on outstanding customer service and has a "Ride Happy or Ride Free" customer service guarantee.

RTA was previously designated as the best large public transit system in North America by the American Public Transit Association.

**Local Bus Service** - RTA's 59 bus routes provide approximately 5,000 daily departures, with approximately 400 full-size (40, 45 & 60-foot) buses serving 6,000 bus stops and 1,100 bus shelters. Fourteen routes operate 24/7.

Four transit centers are located at major bus transfer locations in Parma, Fairview Park, Maple Heights, and at CSU in downtown Cleveland. RTA's major transit hub for Bus and Rail connectivity is at Public Square in downtown Cleveland.

**BUS RAPID TRANSIT (BRT)** - The Euclid Corridor HealthLine operates 24/7 with 24 hybrid-electric Rapid Transit Vehicles, 63 feet in length, serving nearly 20,000 daily customers at 36 stations. Rush-hour service is every 5 minutes.

The Cleveland State Line serves the western suburbs 6 days a week. Fifteen, 60-foot articulated vehicles serve 19 new deluxe stations, with rush-hour service every 8 minutes.

The MetroHealth Line will begin in the fall of 2017 with 16 new coaches and serve Downtown Cleveland, Ohio City and several west side neighborhoods and communities. The MetroHealth Line will operate 24/7.

Plans are now being finalized for the Thrive 105 Corridor linking several of the cities east side neighborhood with University Circle. All BRT services connects with other RTA bus and rail services for optimum multi-modal connectivity.

**RAIL SERVICE** – The Tower City Station on Public Square is where all RTA rail service converges to serve downtown residents, visitors, employees and employers. From the Tower City Station, the RTA Walkway to Gateway connects the Rail Station to the Cavalier's Quicken Loans Arena and the Indian's Progressive Field.

The heavy-rail Red Line has 41 transit cars (each 75-foot long) that serve 18 stations from the Airport, through Tower City Station, to University Circle and East Cleveland. The Red Line operates 7-days-a-week, 20 hours a day with a frequency of every 10 minutes, across 38 miles of track.

The light-rail Blue/Green and Waterfront Lines have 35 cars (each 90-foot long) serving 34 stations from the eastern suburbs to Tower City, on 31 miles of track. The Waterfront Lines operates from the Tower City Station to the Lakefront serving the Flats East Bank Development, Cleveland Browns Stadium, The Great Lakes Science Center and the Rock and Roll Hall of Fame.

**DOWNTOWN TROLLEYS SERVICE** - To connect major downtown venues with the RTA's Tower City Rail Station, the B-Line and E-Line Downtown Trolleys began weekday operations in 2006, Monday-Friday, 7 a.m.–7 p.m. Sponsorships allowed fares to be Free with a Smile, and to extend the service (the C-Line) evenings until 11 p.m.

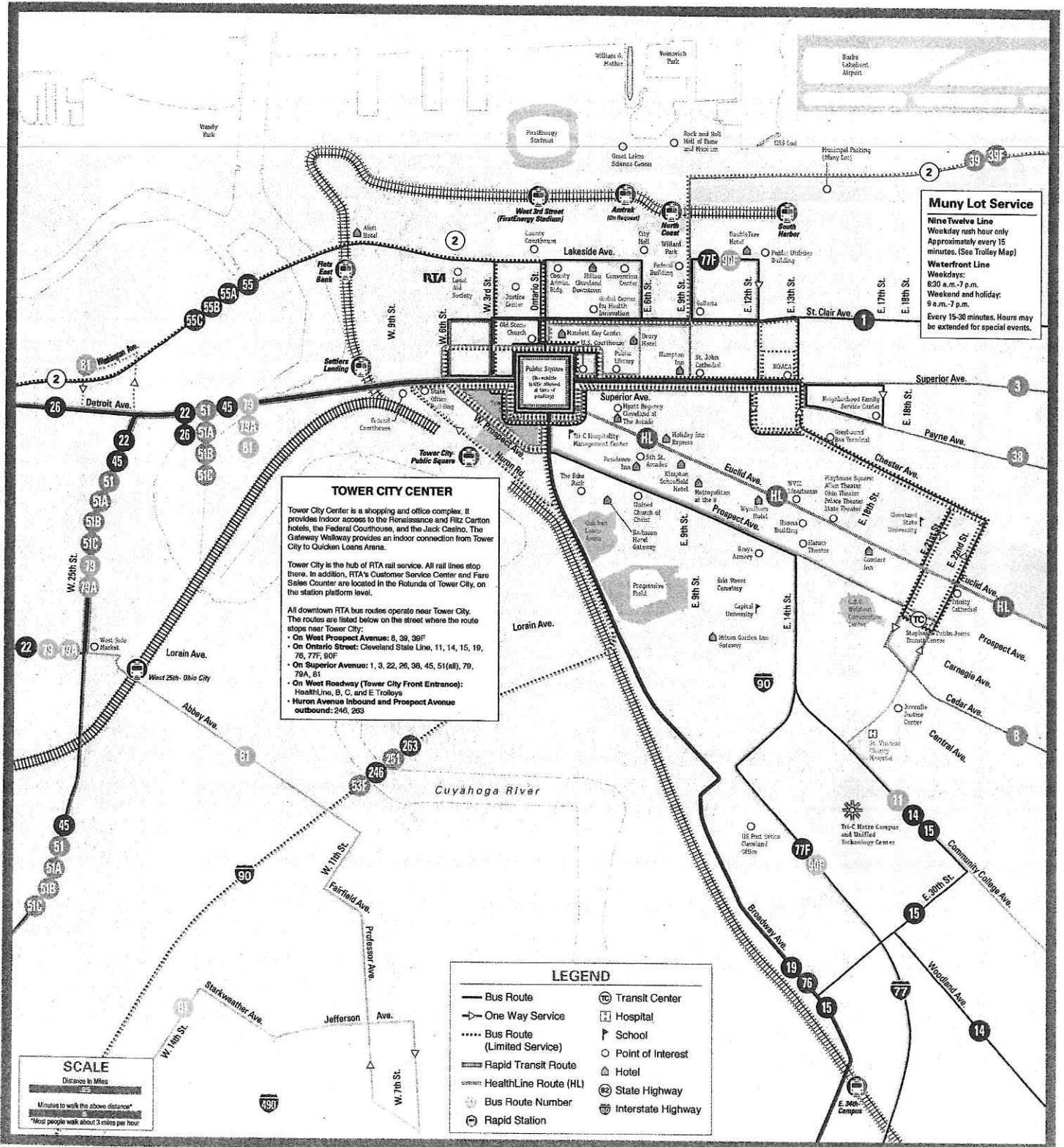
The NineTwelve Trolley connects the Municipal Parking Lot with office buildings that lack affordable parking. The twelve Trolleys provide service with a frequency of every 12 minutes.

Trolley Ambassadors are specially selected and trained to be Ambassadors for the region as many of the trolley customers are visitors.

**PARK-N-RIDE SERVICE** – RTA operates rush-hour service from four major Park-N-Ride lots in Euclid, Westlake, Strongsville and North Olmsted, with 30 MCI over the road coaches equipped with high-back reclining seats, tray tables, and individual passenger lighting. RTA also serves municipal Park-N-Ride lots in Bay Village and Brecksville. Parking is free and the service is express to Downtown every 10 to 15 minutes.

**PARATRANSIT SERVICES** - Designed specifically to meet the needs of persons with disabilities who are unable to use regular RTA buses and trains, this door-to-door service uses approximately 100 vehicles owned and operated by RTA, as well as an additional 80 vehicles operated by private operators under subcontract to RTA.

# Downtown Cleveland



**Muny Lot Service**

**Nine Twelve Line**  
 Weekday rush hour only  
 Approximately every 15 minutes. (See Trolley Map)

**Waterfront Line**  
 Weekdays:  
 8:30 a.m. - 7 p.m.  
 Weekend and holiday:  
 9 a.m. - 7 p.m.  
 Every 15-30 minutes. Hours may be extended for special events.

**TOWER CITY CENTER**

Tower City Center is a shopping and office complex. It provides indoor access to the Renaissance and Ritz Carlton hotels, the Federal Courthouse, and the Jack Casino. The Gateway Walkway provides an indoor connection from Tower City to Quicken Loans Arena.

Tower City is the hub of RTA rail service. All rail lines stop there. In addition, RTA's Customer Service Center and Fare Sales Counter are located in the Rotunda of Tower City, on the station platform level.

All downtown RTA bus routes operate near Tower City. The routes are listed below on the street where the route stops near Tower City:

- On West Prospect Avenue: 8, 39, 39F
- On Ontario Street: Cleveland State Line, 11, 14, 15, 19, 76, 77F, 80F
- On Superior Avenue: 1, 3, 22, 26, 38, 45, 51(all), 79, 79A, 81
- On West Roadway (Tower City Front Entrance): HealthLine, B, C, and E Trolleys
- Huron Avenue Inbound and Prospect Avenue outbound: 246, 263

**LEGEND**

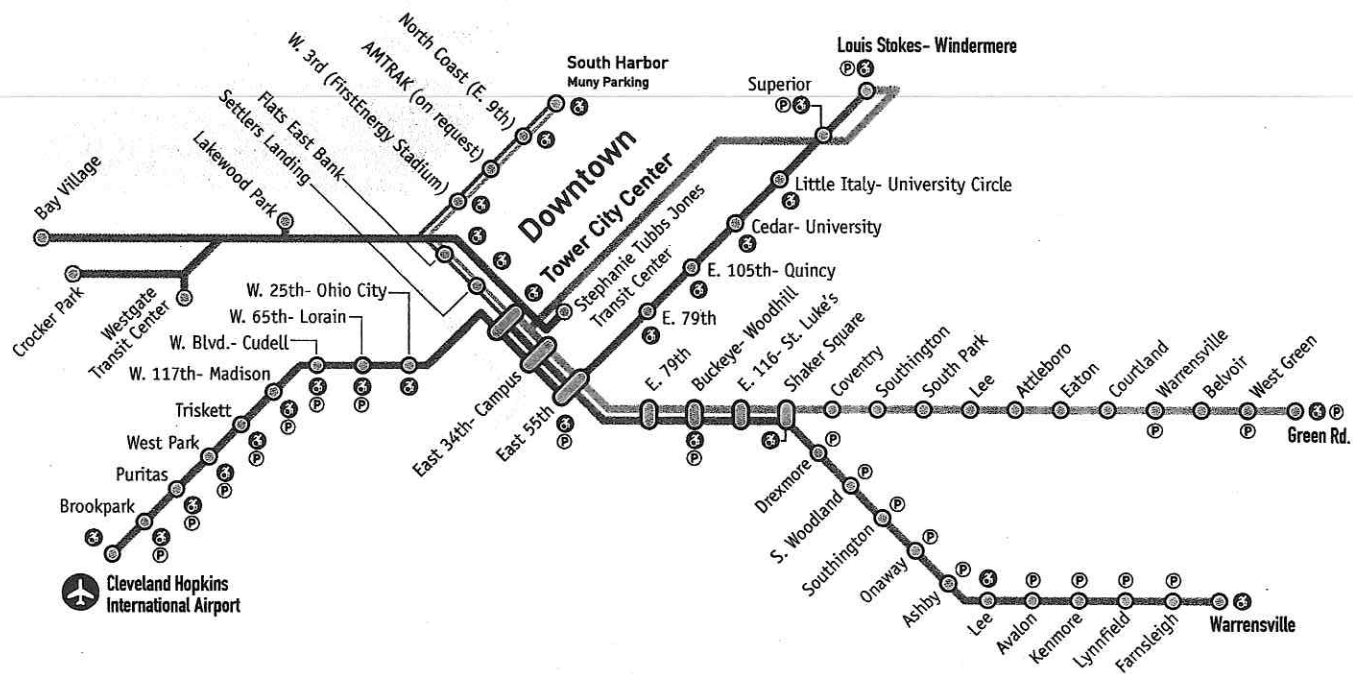
— Bus Route	Ⓜ Transit Center
→ One Way Service	Ⓜ Hospital
⋯ Bus Route (Limited Service)	Ⓜ School
Ⓜ Rapid Transit Route	Ⓜ Point of Interest
Ⓜ HealthLine Route (HL)	Ⓜ Hotel
Ⓜ Bus Route Number	Ⓜ State Highway
Ⓜ Rapid Station	Ⓜ Interstate Highway

**SCALE**  
 Distances in Miles

Minutes to walk the above distance\*

\*Most people walk about 3 miles per hour

# Rapid Transit System



## Rapid Transit

- Blue Line
- Green Line
- Red Line
- Waterfront Line

- Rapid Transit Station
- Cleveland State Line Endpoint
- ADA Accessible Rapid Station
- Free Parking Available

## Bus Rapid Transit

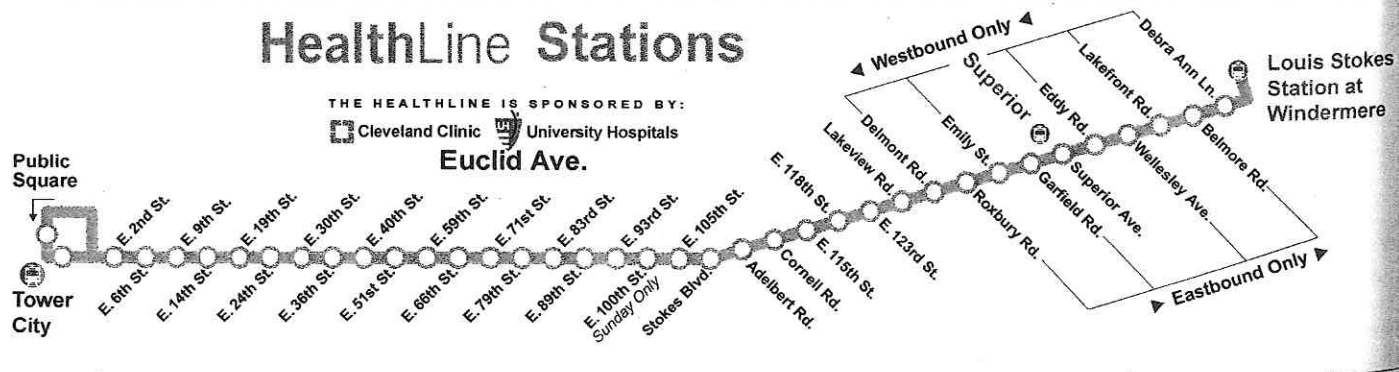
- Cleveland State Line
- HealthLine

## HealthLine Stations

THE HEALTHLINE IS SPONSORED BY:

- Cleveland Clinic
- University Hospitals

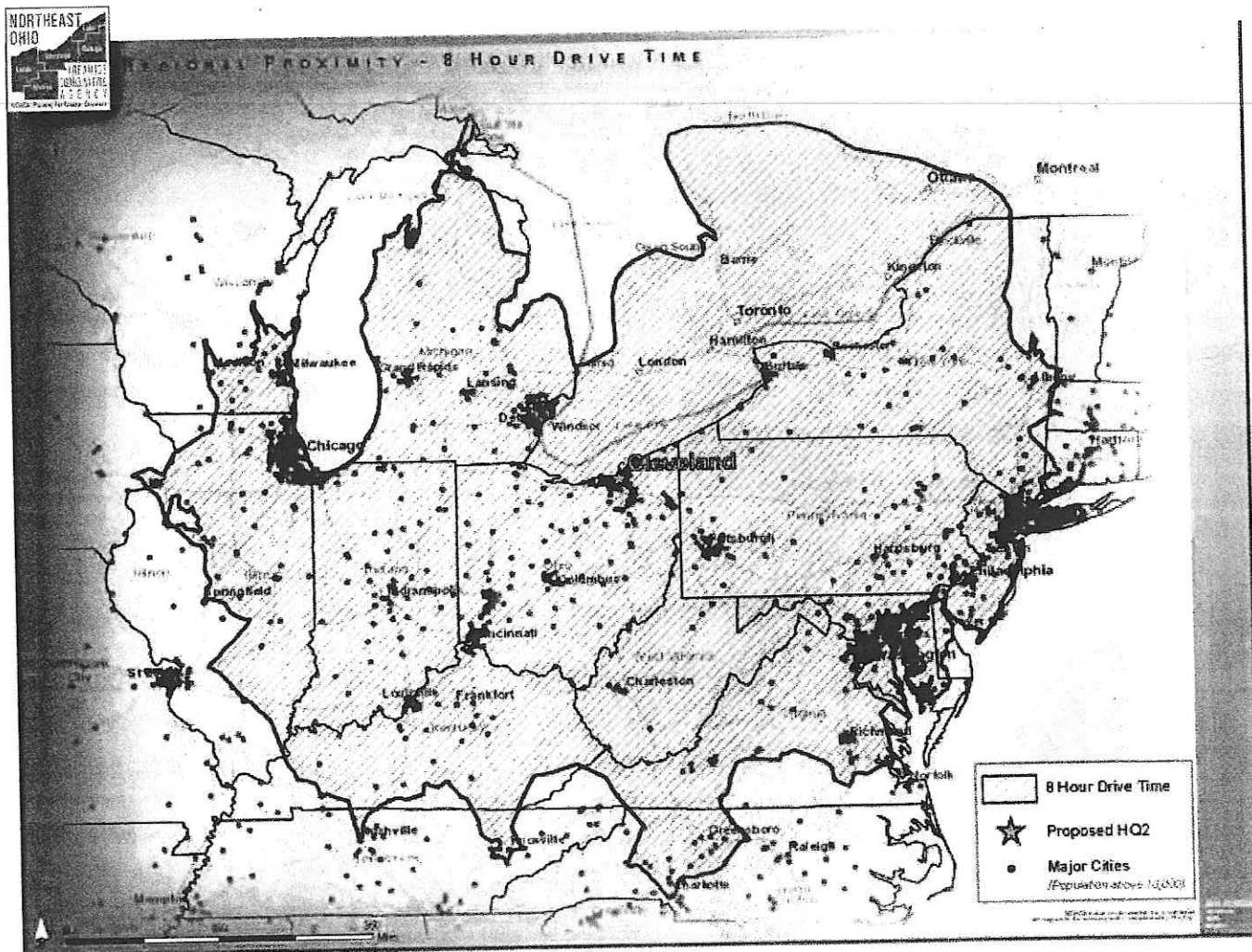
**Euclid Ave.**



**TRANSIT PASSES  
POTENTIAL INCENTIVE OPTIONS  
PROJECT AMAZON**

Year	# of Employees	Full Cost Price of Passes \$1,140 each	Value of Incentive
			25% Discount on Passes
1	2,900	\$3,306,000	\$826,500
2	5,800	\$6,612,000	\$1,653,000
3	8,700	\$9,918,000	\$2,479,500
4	11,600	\$13,224,000	\$3,306,000
5	14,500	\$16,530,000	\$4,132,500
6	19,720	\$22,480,800	\$5,620,200
7	24,940	\$28,431,600	\$7,107,900
8	30,160	\$34,382,400	\$8,595,600
9	35,380	\$40,333,200	\$10,083,300
10	40,600	\$46,284,000	\$11,571,000
11	42,480	\$48,427,200	\$12,106,800
12	44,360	\$50,570,400	\$12,642,600
13	46,240	\$52,713,600	\$13,178,400
14	48,120	\$54,856,800	\$13,714,200
15	50,000	\$57,000,000	\$14,250,000
<b>SUBTOTAL (Years 1-5)</b>			<b>\$12,397,500</b>
<b>SUBTOTAL (Years 1 - 10)</b>			<b>\$55,375,500</b>
<b>TOTAL (Years 1-15)</b>			<b>\$121,267,785</b>

# THE GREATER CLEVELAND METROPOLITAN REGION



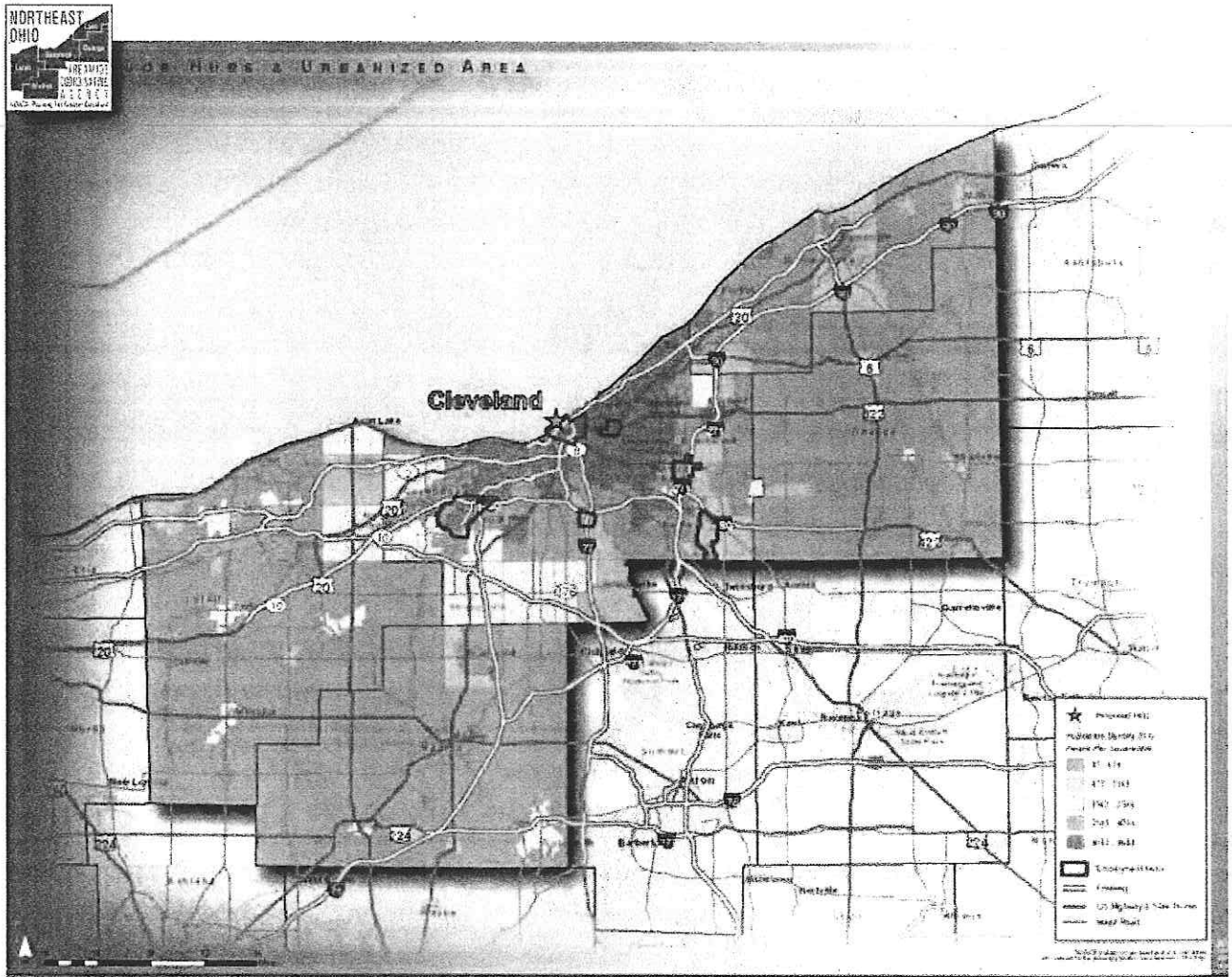
The Greater Cleveland Metropolitan Area is ideally situated for a large corporate headquarters. Cleveland is within an eight hour drive, or approximately 500 miles<sup>1</sup> to

- » 56% of *Fortune* 500 US Headquarters
- » 44% of US Households
- » 43% of US Population
- » 45% of US Effective Buying Income
- » 46% of US Earnings
- » 49% of US Manufacturing Employment

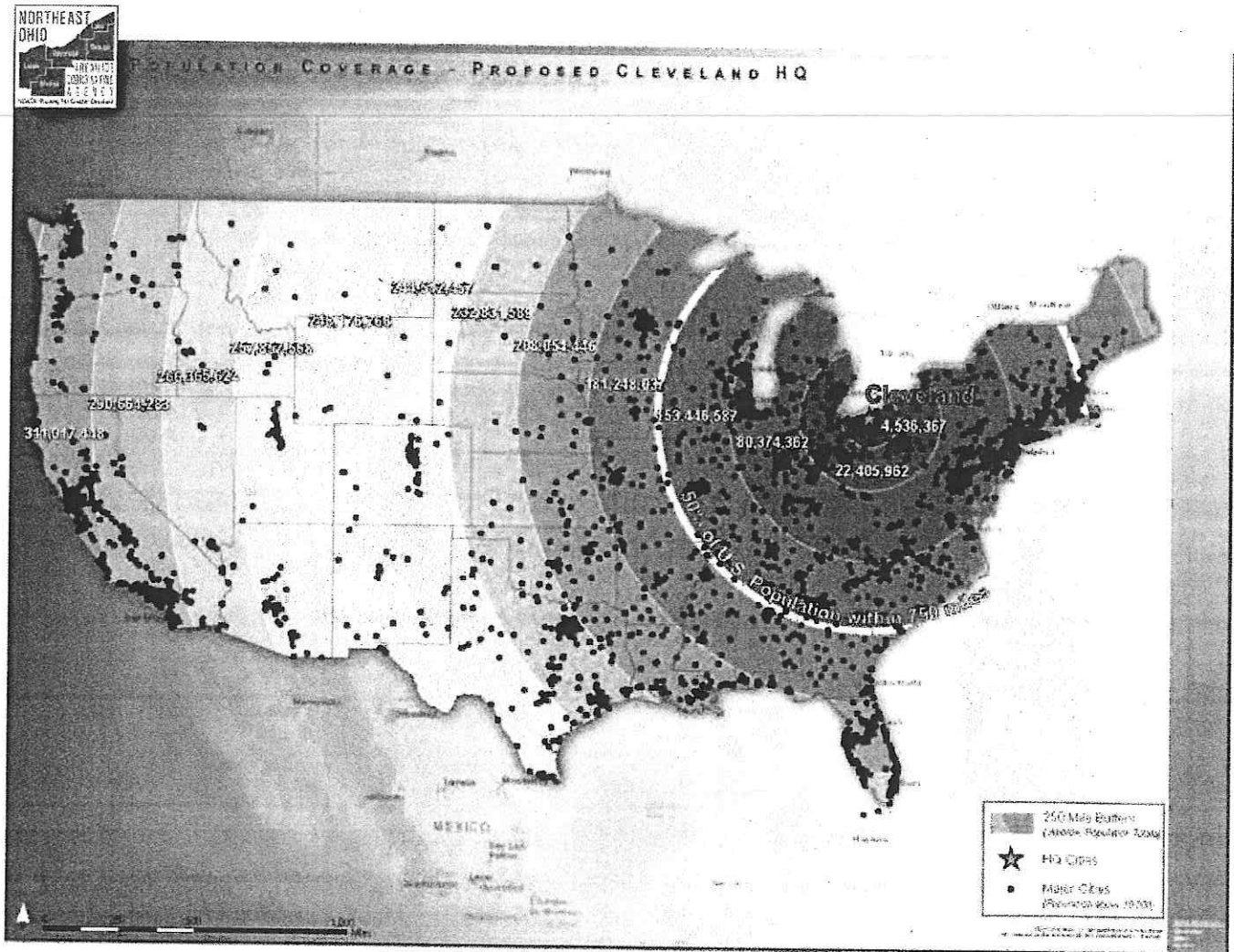
The metro area is also home to 22 *Fortune* 1000 companies headquartered in Northeast Ohio.<sup>2</sup>

<sup>1</sup> <http://rethinkcleveland.org/Strategic-Advantages.aspx>

<sup>2</sup> <http://proximityone.com/metros/2013/cbsa17460.htm>



This map shows the population density in relation to the transportation system and current job hubs. The population in and near the City of Cleveland is the highest with some higher densities in the suburban areas.

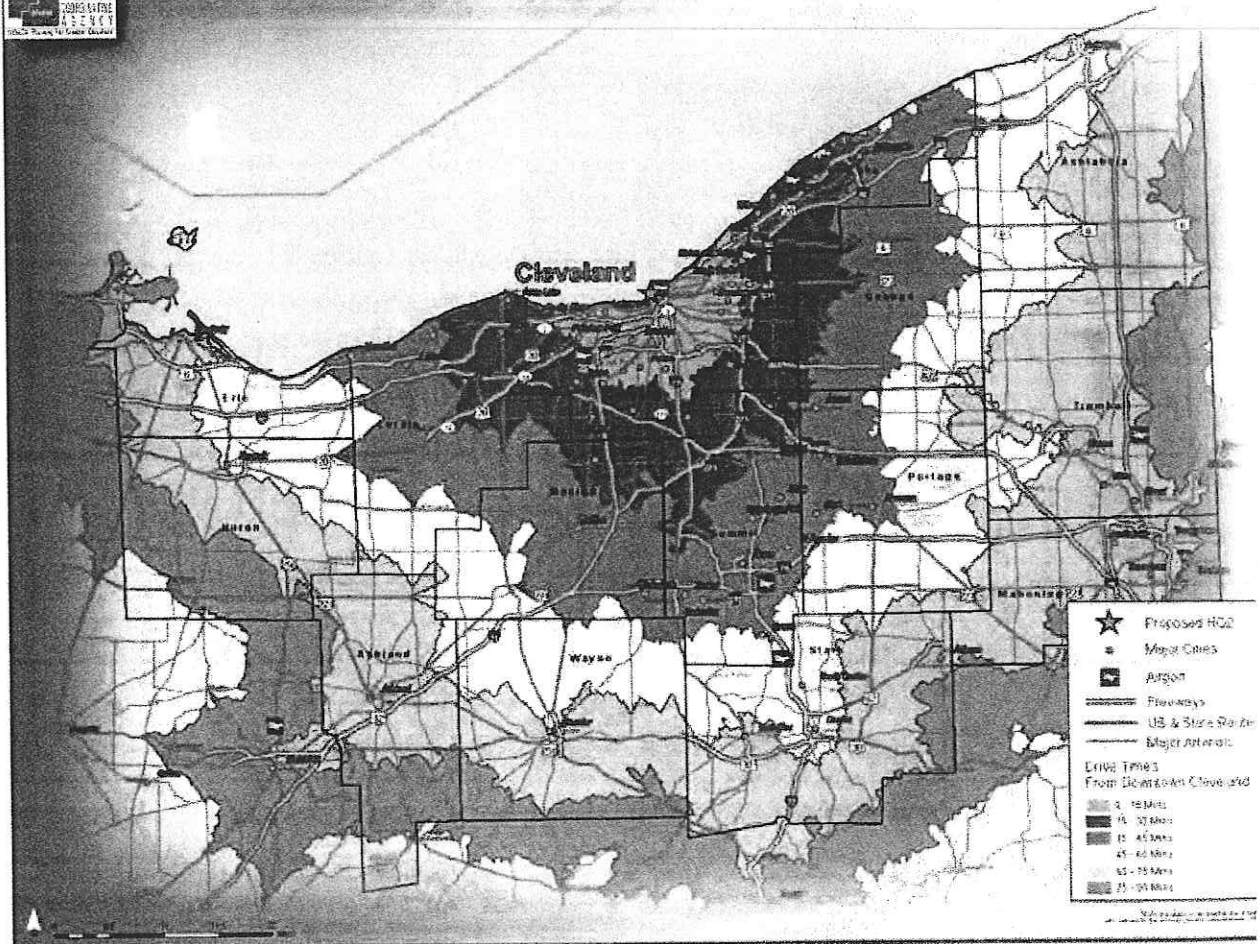


Many major US and Canada urbanized areas are on the east or west coasts and the Greater Cleveland Metropolitan Area provides an optimal location in terms of total distance and distribution coverage from both coasts. The map shows the population in 250 mile radii in relation to Cleveland. The major cities in the east or west coasts, such as Seattle, are not optimally located and are far from the other side and do not provide balanced access coverage to major metropolitan areas.



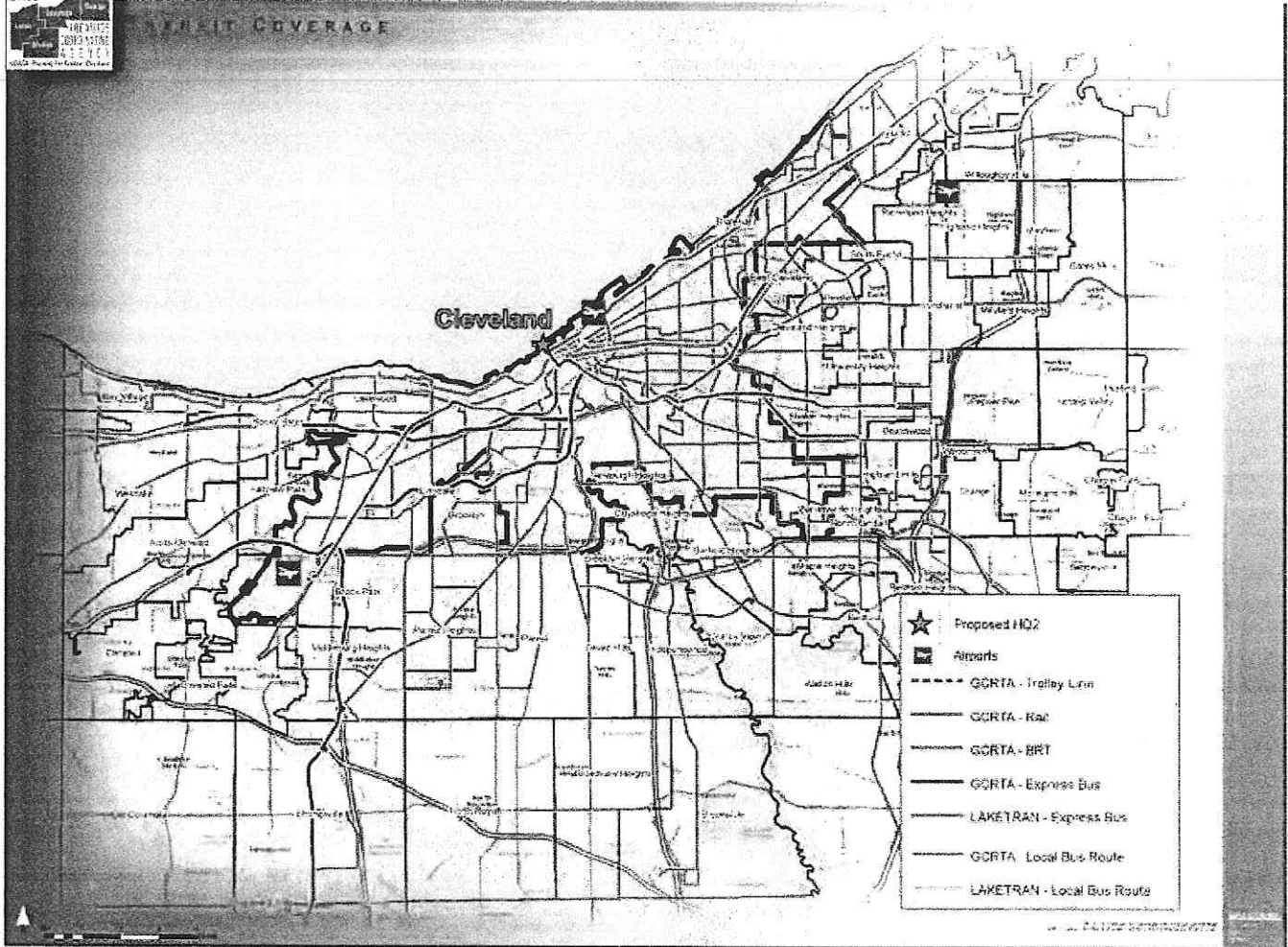


TRAVEL CONNECTIVITY - 90 MINUTE DRIVE TIME



The greater Cleveland metropolitan area enjoys a very robust transportation system. The area is home to 10,978 miles of interstate, arterial and local roads. The interstates in the region are:

- I-71 Interstate 71
- I-77 Interstate 77
- I-80 Interstate 80 (Ohio Turnpike)
- I-90 Interstate 90
- I-271 Interstate 271
- I-277 Interstate 277
- I-480 Interstate 480
- I-490 Interstate 480
- SR 176 (Interstate look-alike)
- US 422 (Interstate look-alike)



Interstate 90 is a transcontinental freeway and the longest interstate highway in the United States connecting Seattle, WA and Boston, MA.

Interstate 80 is the only toll road in the region.

The region also has an extensive arterial system, with 2,588 miles of arterial roadways.

***The AM or PM congested peak periods in the Greater Cleveland Metropolitan Area lasts only 1.5 hours and is much less than those of any major metropolitan area. The average daily delay per capita due to the traffic congestion in the Cleveland Metropolitan Area is only 3 to 4 minutes.***

## Transit

Highways are only part of the story. Transit is an important aspect of the transportation network, and mobility choices are vital to the health and vibrancy of a region. Public transit options reduce congestion, personal transportation costs, and carbon output. The region's transit is the largest system in Ohio with:

### **GCRTA** - Cleveland and Cuyahoga county

Bus - 34,426 trips total including local and express

» Local - 1,268 miles

» Express - 377 miles

BRT- 4,880,729 trips - 68.9 miles

Light Rail - 2,485 trips - 23.2 miles

Heavy Rail - 6,419 trips- 18.9 miles

Trolley - 1,530,698 trips - 12 miles

Water Taxi - 1 route (new service, no date yet)

Total trips(less the trolley trips): 43,119 trips

### **Laketran** - Lake County

454,000 local bus trips

162,348 commuter bus trips into Downtown Cleveland

### **Akron Metro** - Summit County

100,779 commuter bus trips into Downtown Cleveland

The Cleveland Ohio urbanized area is the 29th largest transit travel ranked by passenger trips in the United States.<sup>3</sup>

The Cleveland Ohio urbanized area is the 15th largest heavy rail agency ranked by passenger trips (over 6 million) in the United States.<sup>4</sup>

The Cleveland Ohio urbanized area is the 4th largest Bus Rapid Transit (BRT) agency ranked by passenger trips (over 5 million) in the United States.<sup>5</sup>

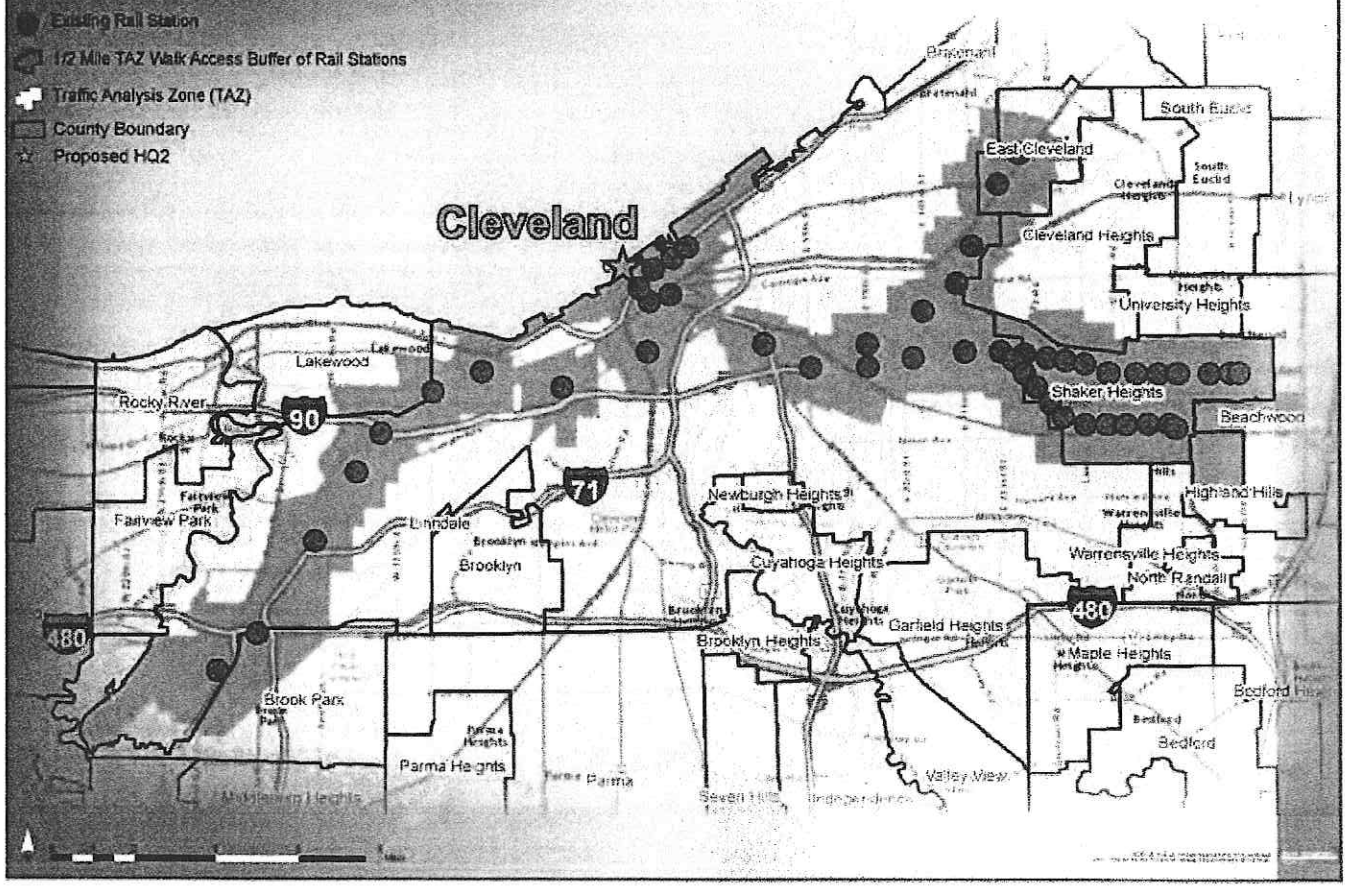
<sup>3</sup> <http://www.apta.com/resources/statistics/Documents/FactBook/2016-APTA-Fact-Book.pdf>

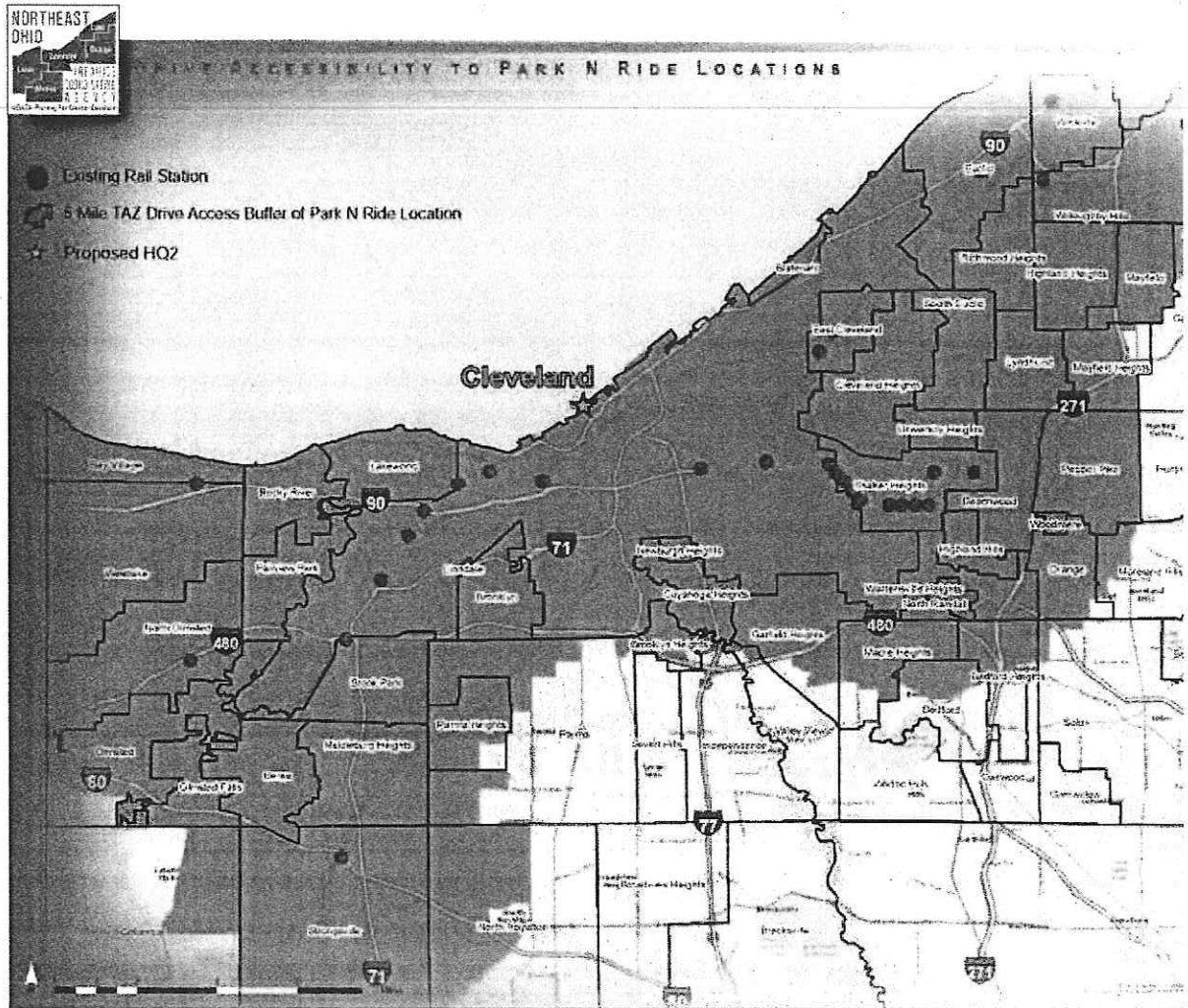
<sup>4</sup> <http://www.apta.com/resources/statistics/Documents/FactBook/2016-APTA-Fact-Book.pdf>

<sup>5</sup> <http://www.apta.com/resources/statistics/Documents/FactBook/2016-APTA-Fact-Book.pdf>



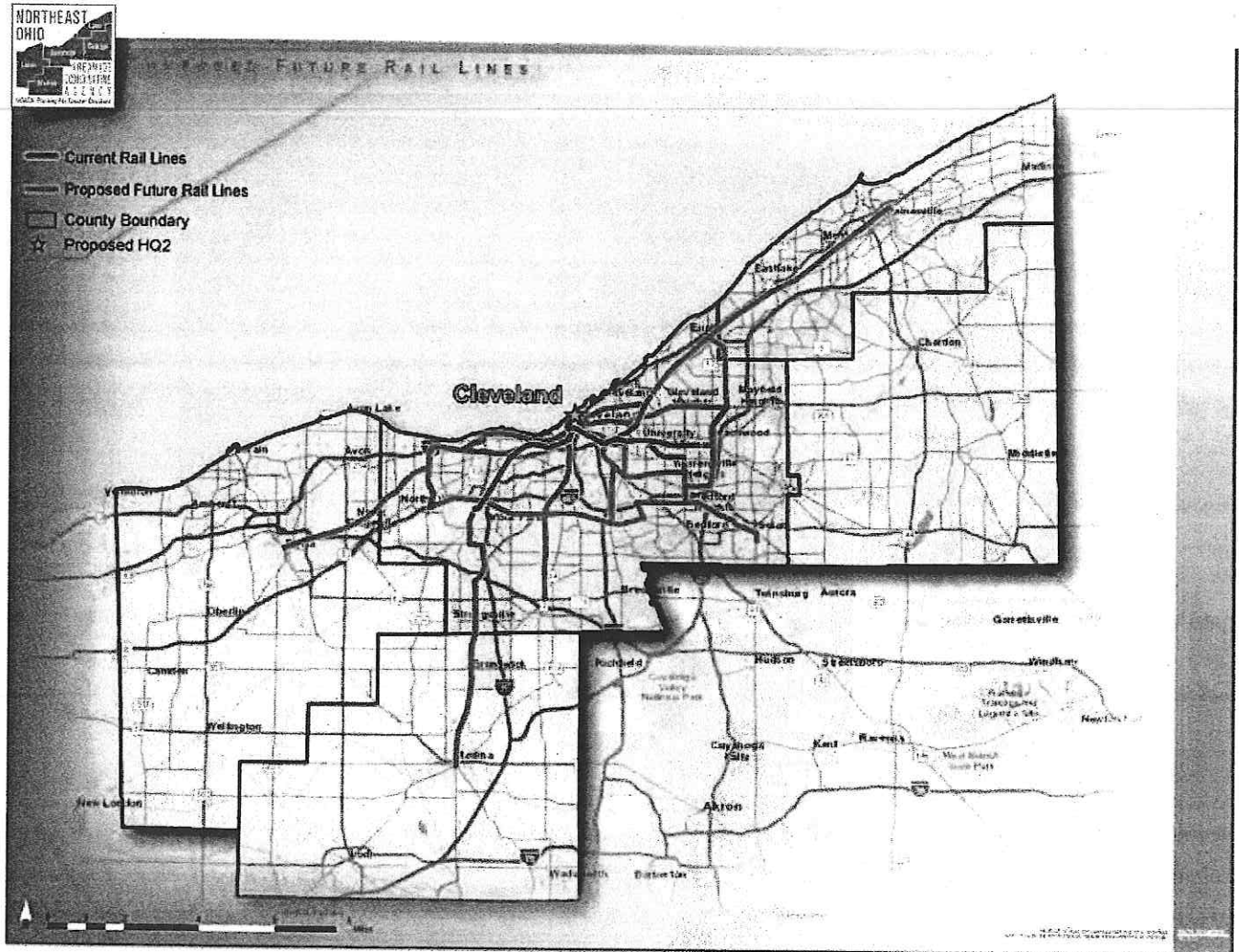
# WALK ACCESSIBILITY TO RAIL STATIONS





Currently, 1.3 million residents in the Cleveland Metropolitan Area have less than 0.5 mile walk access and 5-mile drive access to the existing transit services.

# FUTURE TRANSIT



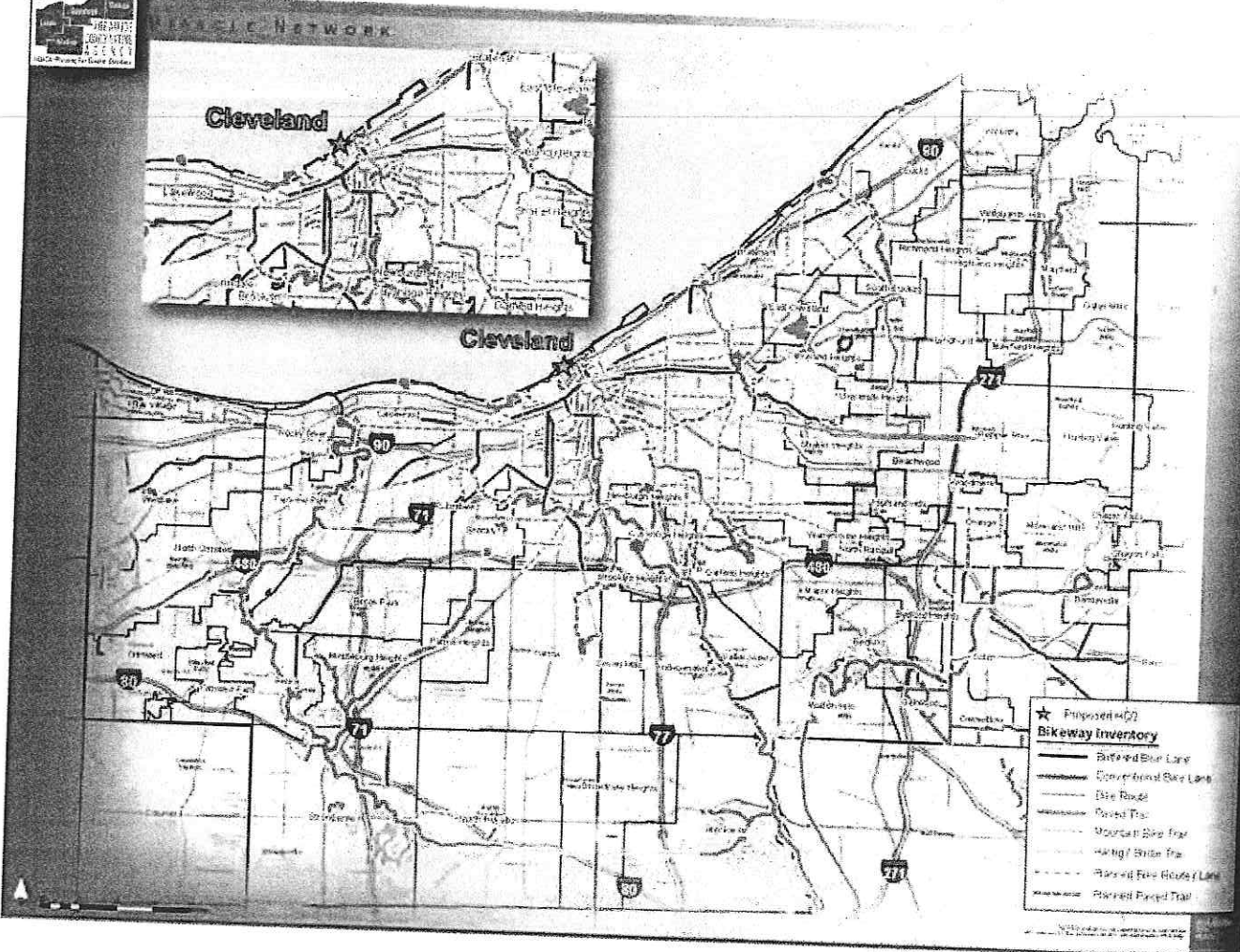
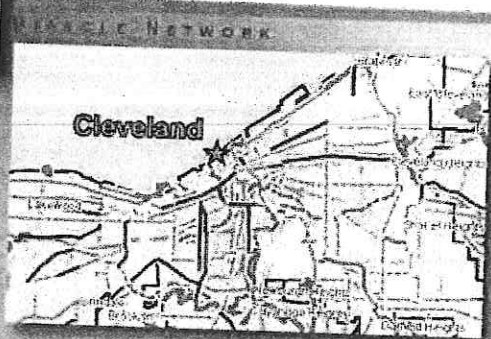
The future transit plan, as documented in the Northeast Ohio Areawide Coordinating Agency's (the greater Cleveland Metropolitan Planning Organization) Long Range Transportation Plan, illustrates the future rail network expanding from the current 37 miles of rail to 111 miles, and the number of stations increasing from 50 to 162. This will make the current good system great, and a system that can grow with Amazon.

## Transit Oriented Development in the Greater Cleveland Region

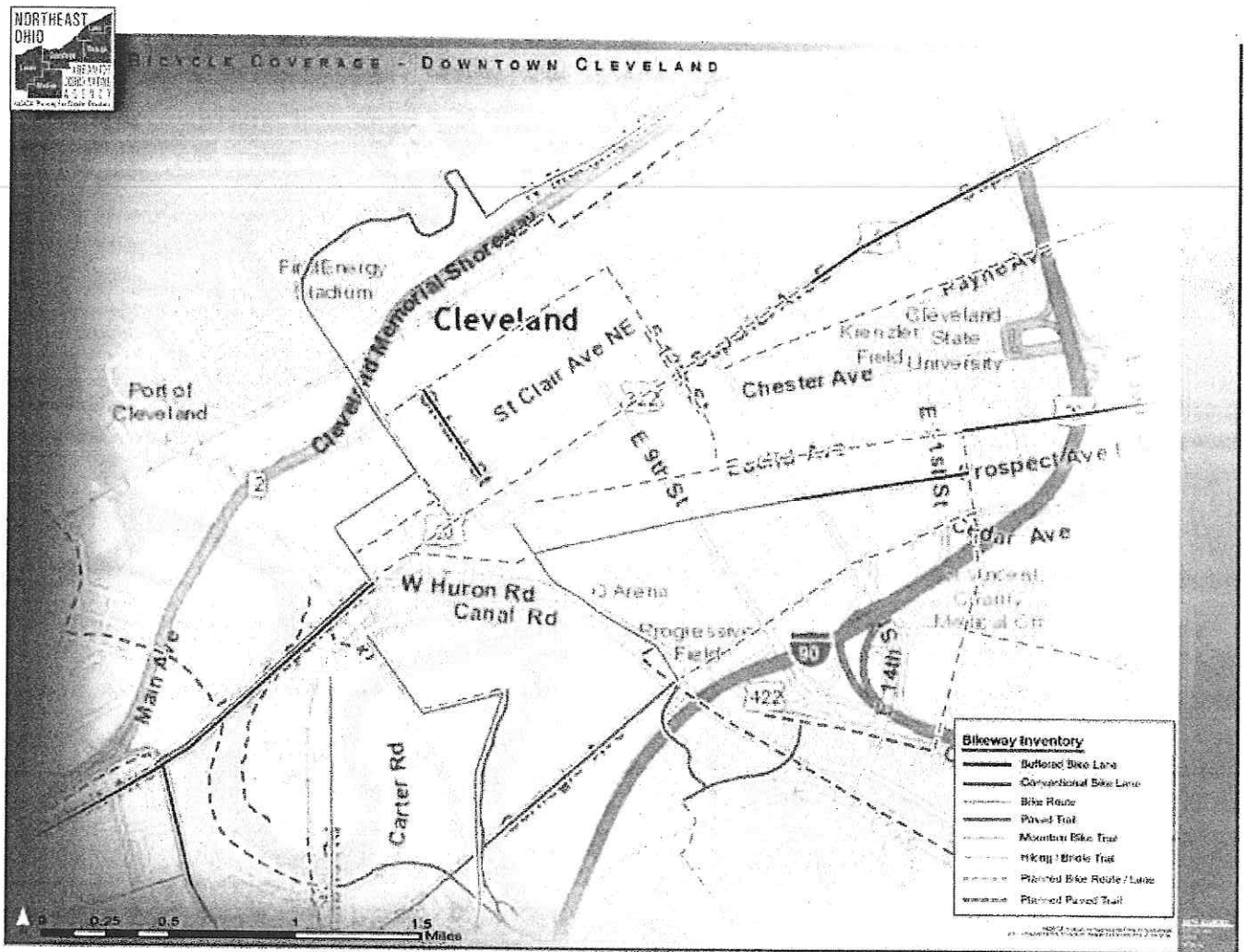
Transit oriented development (TOD) promotes a mixture of housing, retail, services, workplaces, and open space within walking distance of transit to maximize use of the transit system. By directing compact development to existing developed areas that are well-served by transit, TOD reduces public infrastructure costs over time and preserves regional open space. TOD is most important in providing job access by connecting to existing transit and active transportation facilities.

The Northeast Ohio Areawide Coordinating Agency, in partnership with the Greater Cleveland Regional Transit Authority, has completed a Transit Oriented Development Scorecard and Implementation Plan. This project seeks to help increase ridership and promote development in and around the region's rail stations and high performing bus corridors. Although Greater Cleveland already has a rich history of development near transit, this plan along with other upcoming projects shows that the region is using it as tool to influence future development.

# ACTIVE TRANSPORTATION



- ★ Proposed
- Bikeway Inventory**
- Buffered Bike Lane
  - Conversion Bike Lane
  - Bike Route
  - Paved Trail
  - Mountain Bike Trail
  - Multi-Use Trail
  - Paved Foothold Lane
  - Paved Freeway



Active transportation is another important piece of the transportation system, and the greater Cleveland area has great facilities throughout. The Bicycle Network Map displays the existing and proposed bicycle facilities in the region.

The metrics shown below are for existing facilities, but many hundreds of miles of facilities are planned:

On-road facilities – 407 miles

Off-road facilities – 453 miles

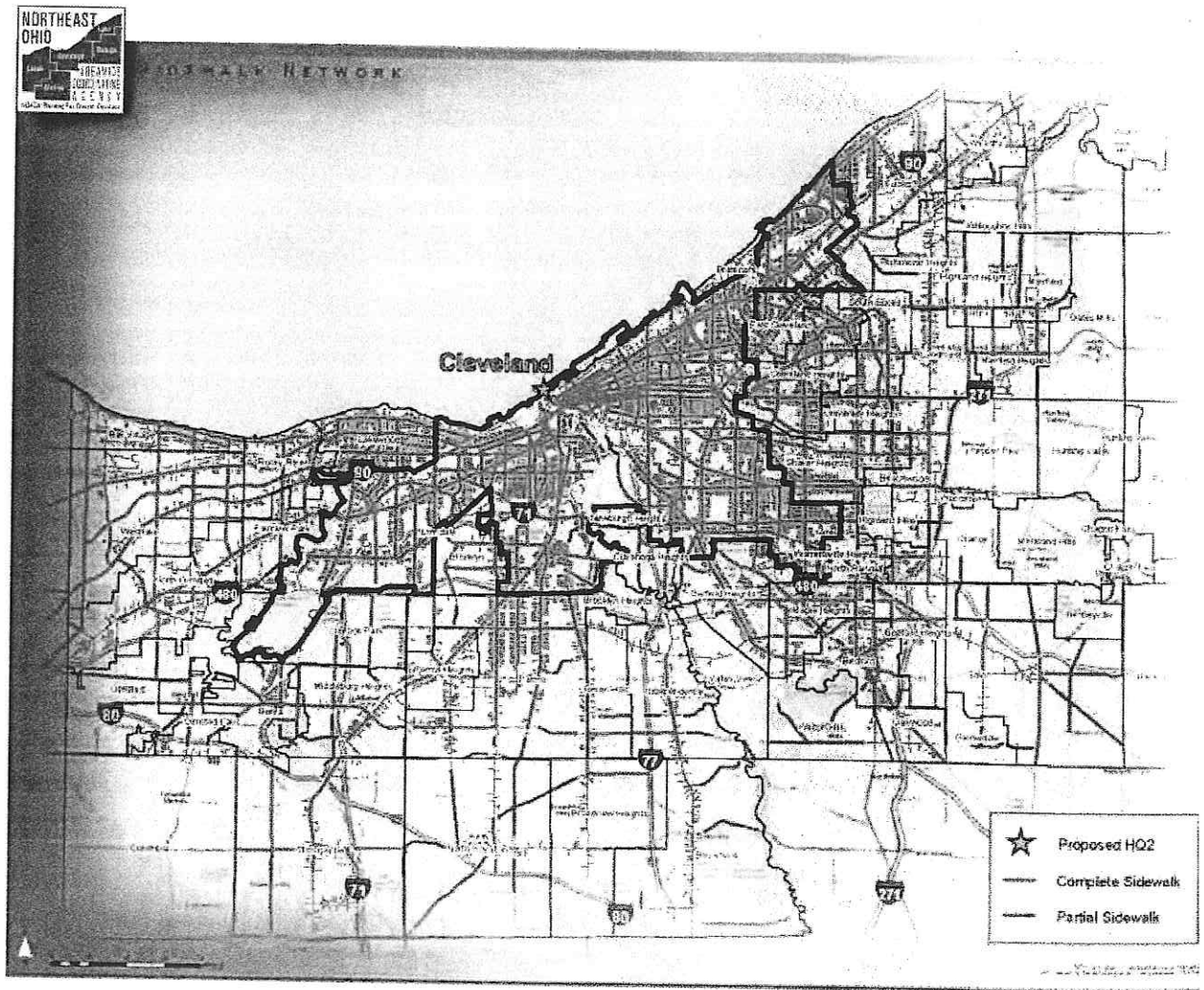
The League of American Bicyclists' report on 2014 American Community Survey Data compared local bicycle mode share with other cities and states.<sup>6</sup> The City of Cleveland's bicycle commute rate is more than double the state average. Cleveland's rate has also increased 238% since 2000. This now ranks Cleveland 40 of 70 large cities in the United States for bicycle commuting. Cleveland is ranked 7 among a list of 50 cities where bicycle commuting is growing the fastest. A U.S. Census report assessed change in walking and biking commute rates in Cleveland from 2000 to 2010 and determined that both modes saw increases that are statistically significant.<sup>7</sup>

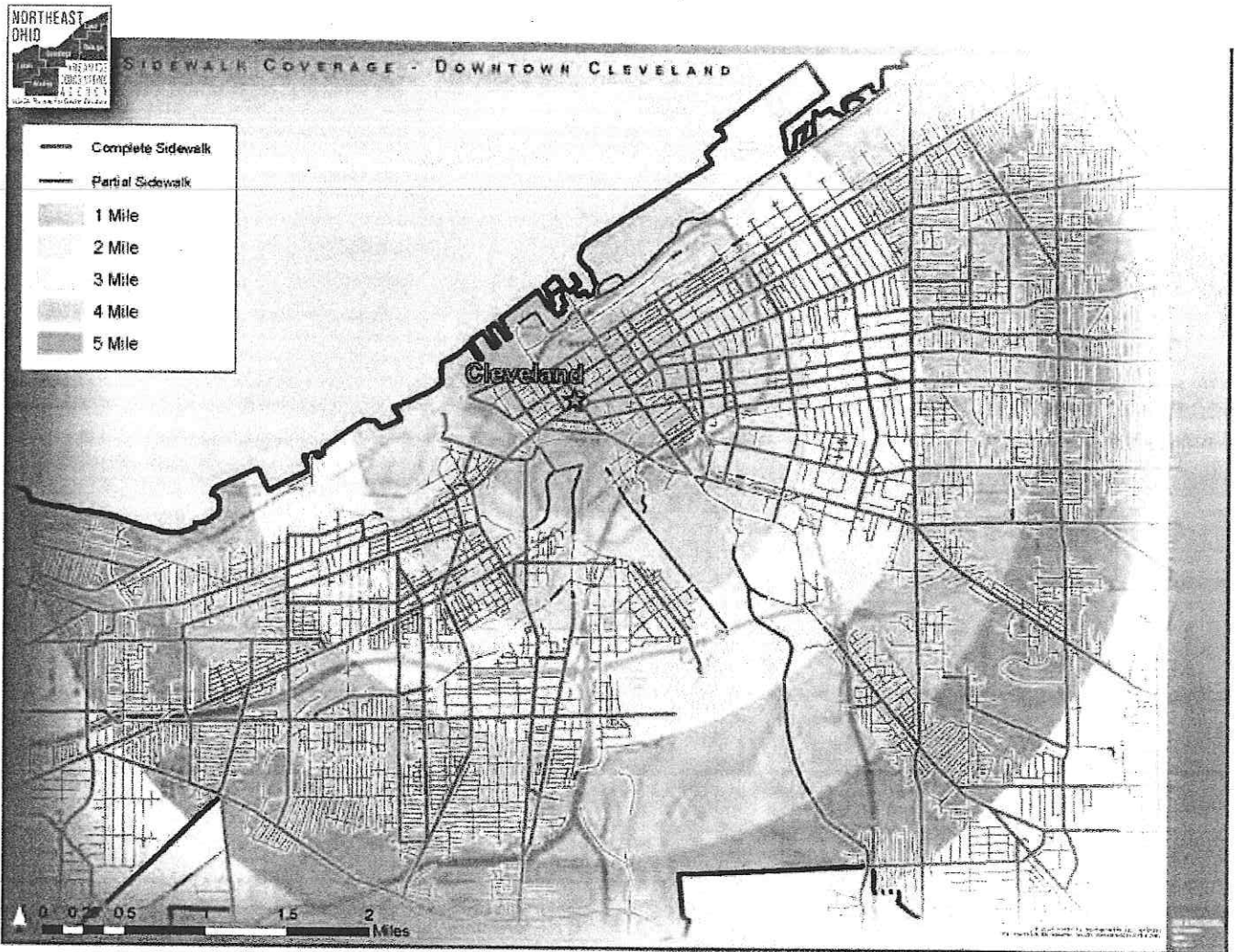
<sup>6</sup> League of American Bicyclists, "Where We Ride: Analysis of bicycle commuting in American cities," Report on 2014 American Community Survey Data, [http://www.bikeleague.org/sites/default/files/Where\\_We\\_Ride\\_2014\\_data\\_web.pdf](http://www.bikeleague.org/sites/default/files/Where_We_Ride_2014_data_web.pdf).

<sup>7</sup> Brian McKenzie, "Modes Less Traveled—Bicycling and Walking to Work in the United States: 2008–2012," American Community Survey Reports (Washington, D.C.: U.S. Bureau, May 2014), <https://www.census.gov/prod/2014pubs/acs-25.pdf>.



In addition to bicycle-specific facilities, bicycling has been increasingly integrated with transit in Cuyahoga County, via Greater Cleveland Regional Transit Authority's (GCRTA) Rack-N-Roll program, which allows bicyclists to load their bicycle onto a bike rack located on the front bumper of every bus. Bicycles are also allowed on-board Bus Rapid Transit (BRT) buses and GCRTA trains. In 2016, UH Bikes Cleveland Bike Share program was launched in the City of Cleveland, expanding easy access to bicycles by tourists and commuters who drive or take transit downtown or to University Circle. The UH Bikes system initial launch included 250 bikes at 27 fixed stations and 4 "virtual" stations.



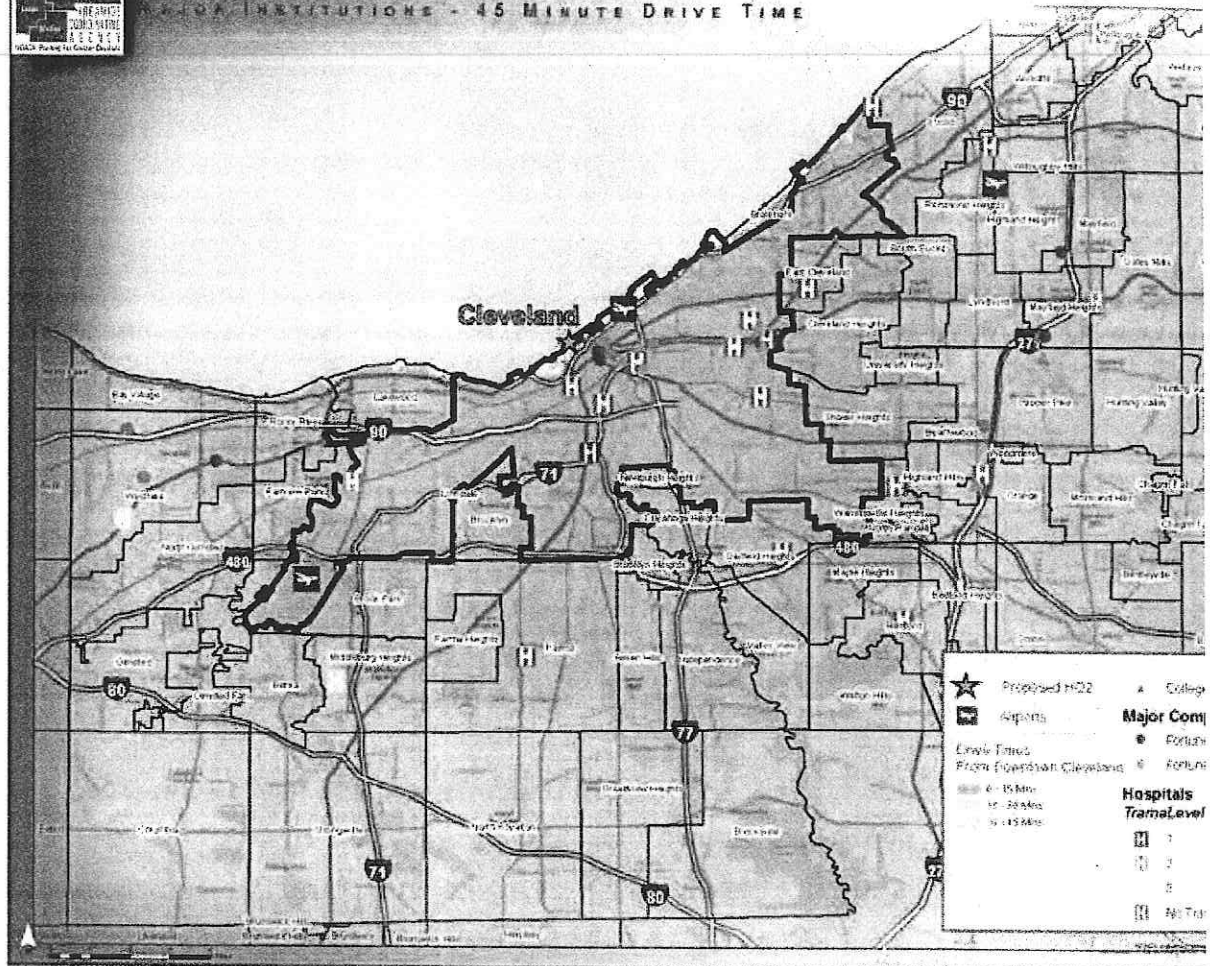


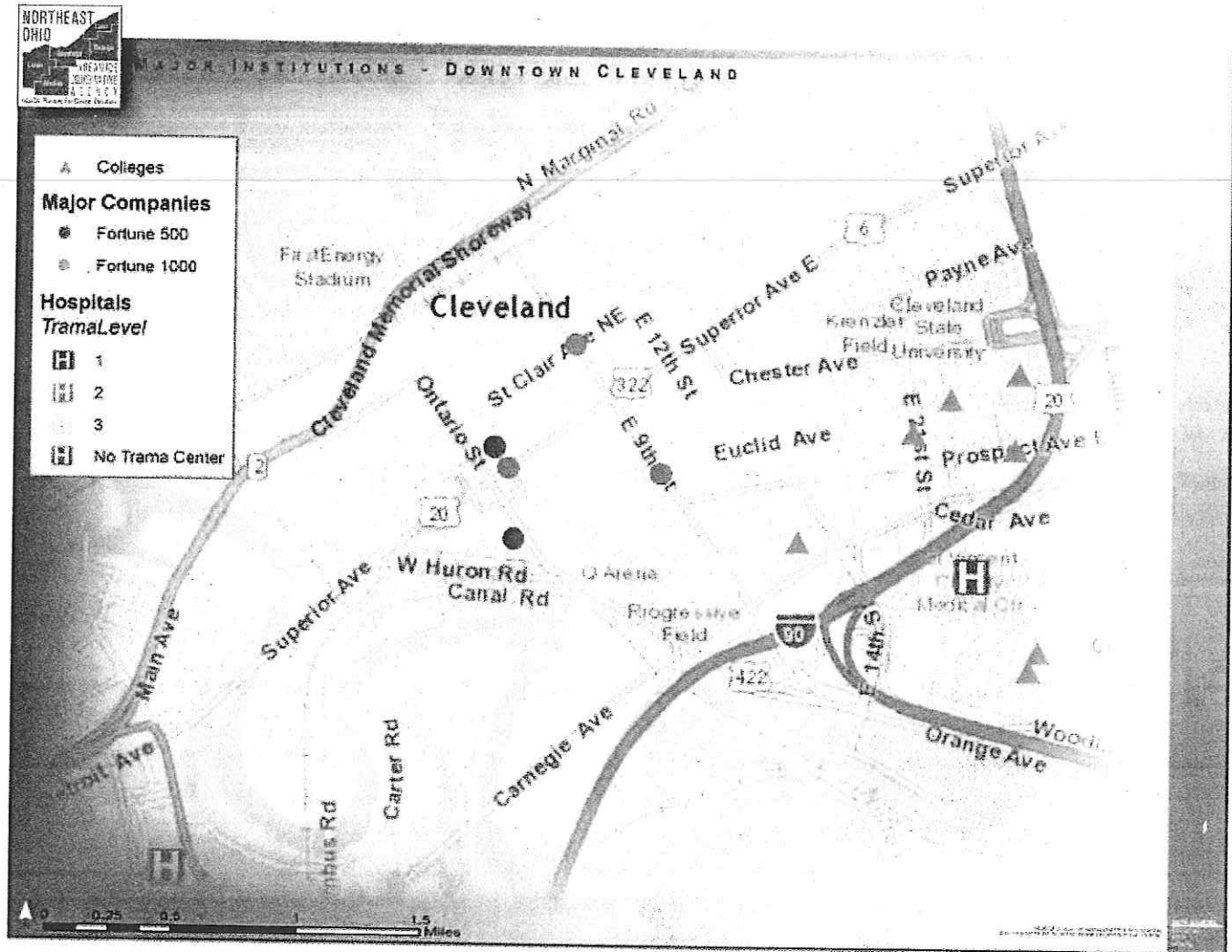
The Sidewalk Network Map displays the existing sidewalks in the region. The region has very good sidewalk coverage with the exception of the exurban and rural areas.

# MAJOR INSTITUTIONS



MAJOR INSTITUTIONS - 45 MINUTE DRIVE TIME



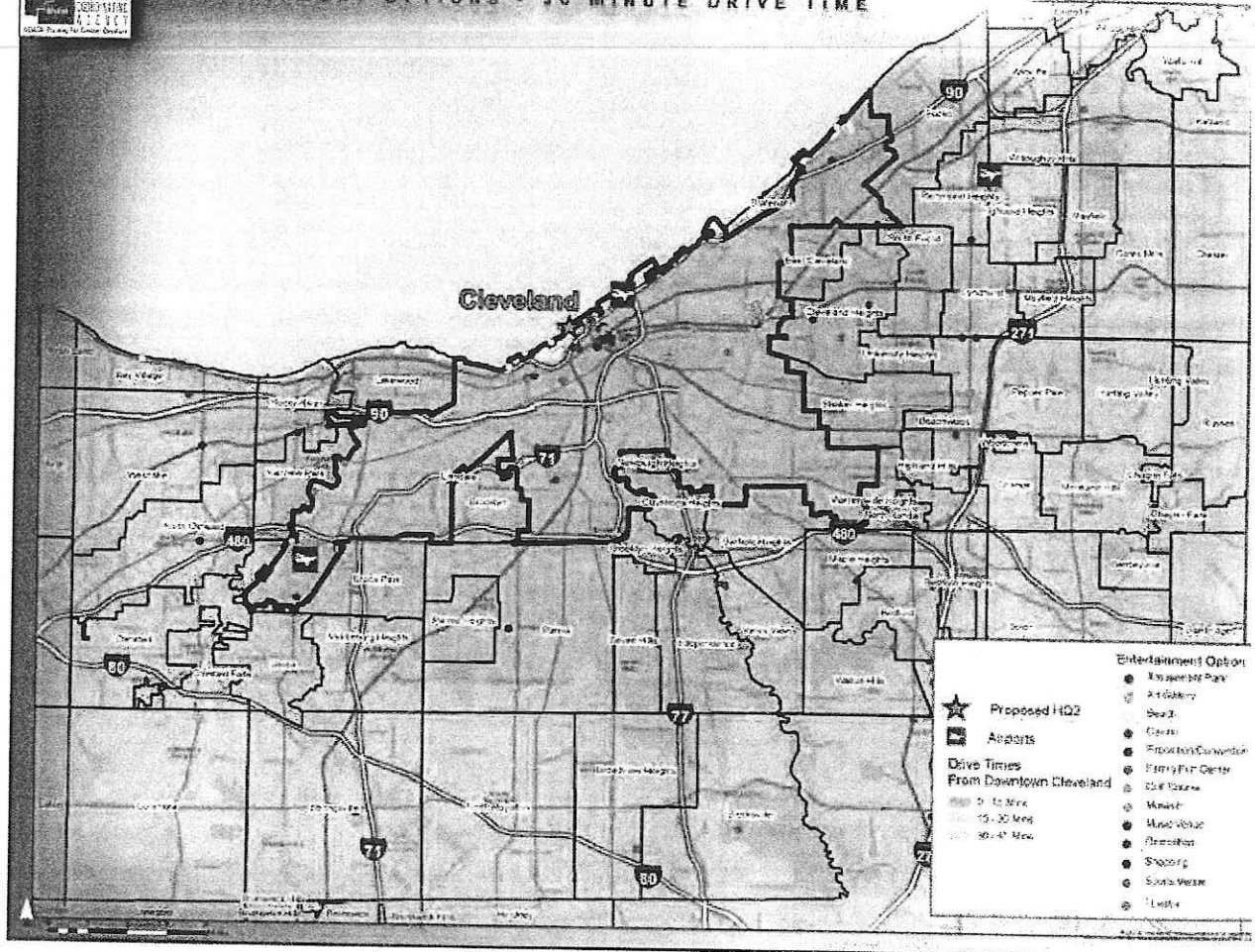


The region is home to a concentration of corporate, educational, and medical institutions. Cleveland Clinic is ranked number 1 in the nation for heart care and number 2 in the nation overall. University Hospitals Cleveland Medical Center is ranked nationally in 8 adult specialties and 9 children's specialties. It also achieved the highest rating possible in 8 procedures or conditions. Metrohealth Hospital and University Hospital are both level 1 trauma centers. The region is also home to 22 Fortune 1000 headquarters.

# MAJOR ATTRACTIONS AND ENTERTAINMENT



ENTERTAINMENT OPTIONS - 90 MINUTE DRIVE TIME

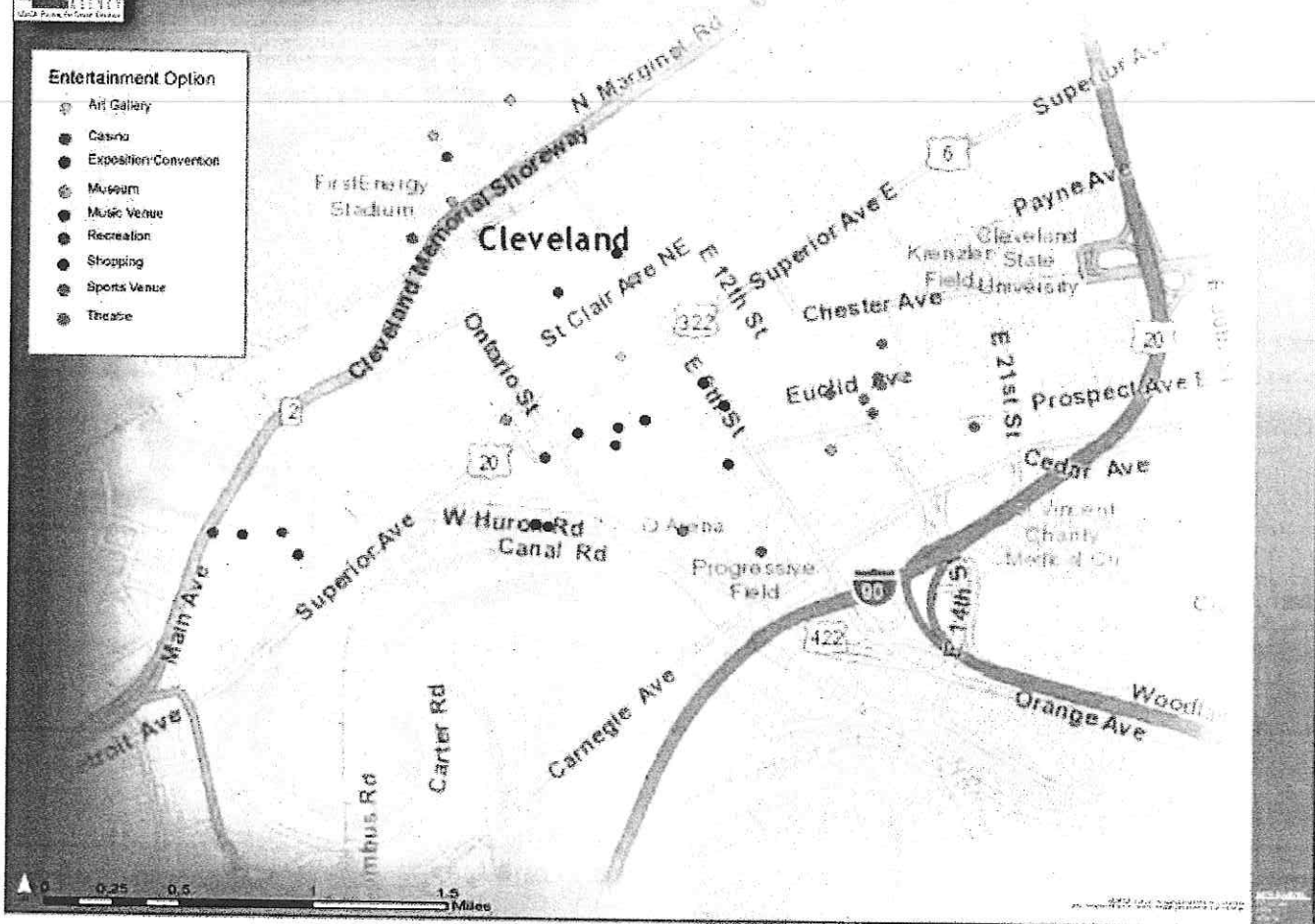


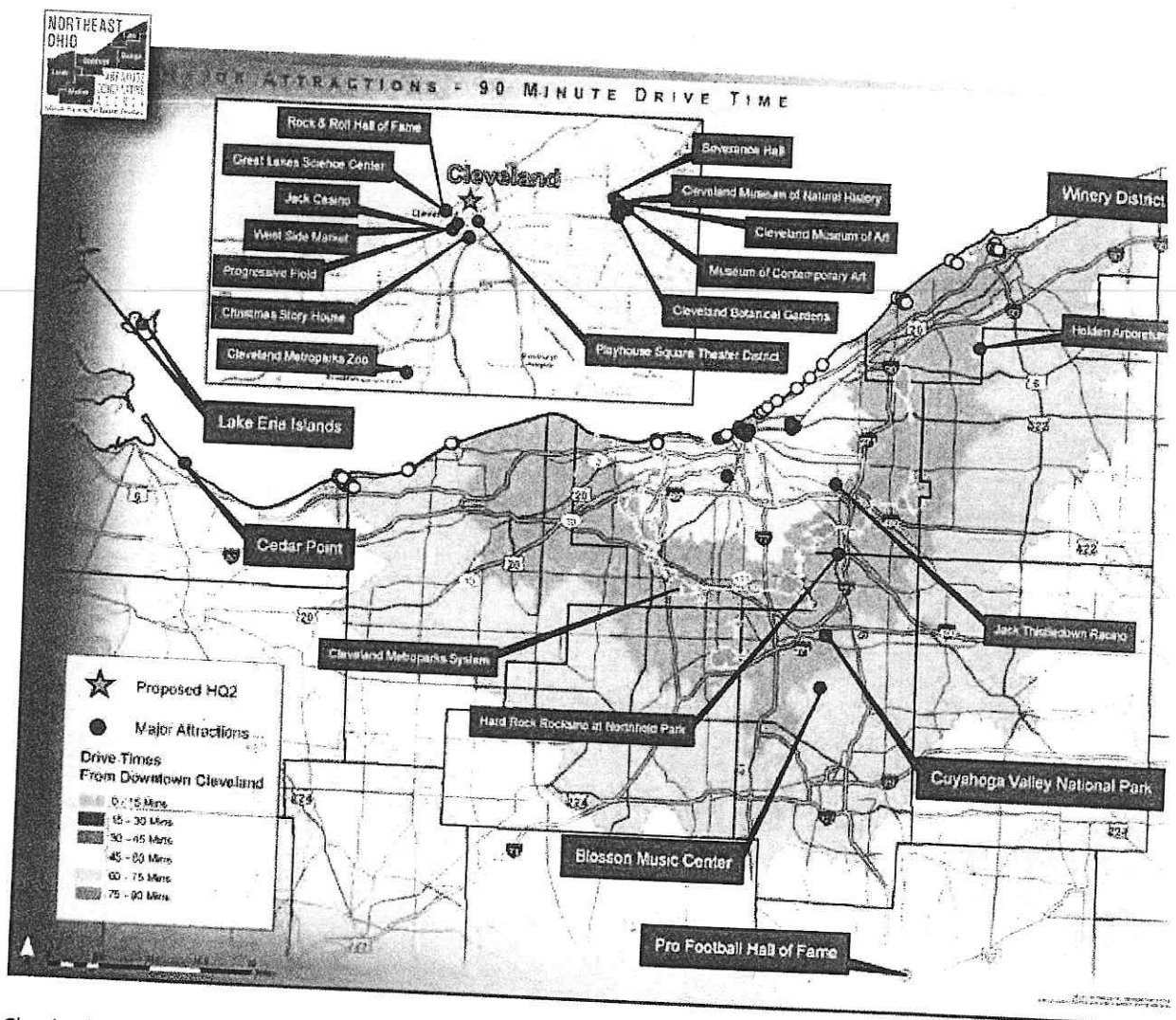


# ENTERTAINMENT OPTIONS - DOWNTOWN CLEVELAND

## Entertainment Option

- Art Gallery
- Casino
- Exposition/Convention
- Museum
- Music Venue
- Recreation
- Shopping
- Sports Venue
- Theatre





Cleveland is home, or within short travel distance, to a vast network of entertainment venues and attractions. Entertainment options show proximity of downtown Cleveland to entertainment options including amusement parks, art galleries, museums, sporting venues, theatres, beaches, a casino, and regional shopping facilities. Notable venues and attractions with drive range from downtown Cleveland include:

- » Cleveland Museum of Art (0-15 minutes) – Ranked the #2 museum in the nation by Business Insider in 2016.
- » Playhouse Square (0-15 minutes) – The largest performing arts center in the United States outside of New York. (Only Lincoln Center in New York City is larger.) Playhouse Square welcomes more than 1 million guests to 1,000+ performances and events each year.
- » Rock and Roll Hall of Fame (0-15 minutes) – Since its opening in 1995 the Rock and Roll Hall of Fame has had more than 10 million visitors.
- » Major League Sports Franchises – Cleveland is home to three major league sports franchises, the NBA champion Cleveland Cavaliers, MLB American League champion Cleveland Indians, and the Cleveland Browns. The Cleveland region is also home to the Lake Erie Monsters minor league hockey team, Cleveland Gladiators indoor football team, and several minor league and semi-pro baseball teams.

- » Cedar Point Amusement Park (45-60 minutes) – Consistently ranked as a top amusement park in the world by theme park and roller coaster enthusiasts. Amusement Today ranks Cedar Point as the second best amusement park in the world.

Cleveland is home to numerous restaurants and bars, accessible by foot, bike, train, and car. Cleveland is quickly becoming one of the best food cities in the America and boasts restaurants and chefs that are nationally renowned. As such, in 2015 TIME magazine ranked Cleveland 7th for Americas Best Food Cities (<http://time.com/3746147/americas-best-food-cities/>) based on rankings from its Travel and Leisure readers.





# CULTURAL AND COMMUNITY FIT

# CLEVELAND



What is the measure of a great city? The height of its skyscrapers? The size of its convention center? The number of *Fortune* 500 companies within its borders? The records of its sports teams?

Although each of these can contribute to greatness, the ultimate measure of a city's greatness is the quality of life it offers to its citizens.

A great city connects its citizens to great choices in housing, education, employment, services, shopping, entertainment, and culture as well as to opportunities to live in neighborhoods that are safe, secure, and vibrant. A great city truly can be a place that nurtures the body, the mind, and the spirit of those who choose to make the city home.

Just as importantly, a great city is a "city of choice and of choices" not just for its most privileged but also for those who have been denied access to many of the pathways that can lead to success and fulfillment in life. Cleveland is a city on the rise to greatness and we invite Amazon to be part of Cleveland's growth. (*adapted from the Connecting Cleveland 2020 Citywide Plan*)

## Cleveland's Key Strengths:

Cleveland's strengths range from the inherent advantage of its location on Lake Erie to the cultural and civic assets it developed when it was one of the nation's largest cities to the newly developing assets flowing from the innovations of its medical and educational institutions. More specifically, Cleveland's principal strengths relative to other U.S. cities and regions include the following.

- » **Metropolitan Population.** Cleveland is the central city of the 25th largest metropolitan area in the nation, making Cleveland a major economic market.
- » **Downtown Population.** The population of downtown Cleveland, although still relatively small, increased by 1/3 between 1990 and 2000, one of the largest gains recorded among major U.S. cities and is continuing to grow.
- » **Medical Innovation.** Cleveland is home to the Cleveland Clinic, consistently ranked as the nation's top cardiac care center, and University Hospitals, featuring one of the nation's top-ranked pediatric hospitals.
- » **Higher Education.** Cleveland is home to Case Western Reserve University, the only Ohio institution ranked among the nation's top 50 universities, and Cleveland State University, featuring one of the nation's top ten colleges of urban affairs.
- » **Information Technology.** Cleveland has been recognized as a national leader in creating the "ultra-broadband" network needed to fuel information technology business development.
- » **Waterfronts.** The shorelines of Lake Erie and the banks of the Cuyahoga River and its tributaries give Cleveland unparalleled opportunities for waterfront recreation and maritime commerce.
- » **Water.** Lake Erie gives Cleveland a supply of fresh water – supporting both manufacturing and residential development – that is the envy of cities across the nation, particularly in regions where fresh water is a scarce and precious commodity.
- » **Air.** Cleveland's airport system, including Cleveland Hopkins International and Burke Lakefront Airports, represents Ohio's premier airline passenger and corporate general aviation options, respectively. Both are powerful local and regional economic engines while providing strategic and critical access to the world economy for Cleveland and Northeast Ohio.

- » **Location and Accessibility.** Cleveland is centrally located in the most populous region of the United States. In 2004, Cleveland was ranked first in the Midwest and fourth in the nation as a location for “logistics management,” with Cleveland’s interstate highway access cited as top-ranking asset. Cleveland is one of the most accessible metropolitan areas in the United States.
- » **Neighborhood Institutions.** Cleveland is a city known nationally for the quantity and quality of its neighborhood organizations, including community development corporations that combine grassroots connections with technical skills to create unique capabilities for revitalizing neighborhoods.
- » **Philanthropic Support.** Cleveland benefits from unusually strong philanthropic support from the non-profit and corporate sectors, including the Cleveland Foundation, the nation’s oldest and second largest community foundation and the model for community foundations worldwide.

### **Zoning:**

Innovative zoning regulations and an updating of the City’s code are core components in implementing the Connecting Cleveland 2020 Citywide Plan. That process has already begun and includes creation of the City’s first research district, first live-work district, first pedestrian-oriented retail district, and the City’s first zoning district that mandates mixed-use, multi-story development – each designed to implement aspects of the plan’s vision.

The Urban Core Overlay (UCO) is emblematic of the progressive zoning tools Cleveland is implementing across the city. The future viability of a legacy city like Cleveland hinges on our ability to create dynamic, mixed-use neighborhoods that offer a variety of transportation and housing options for all its citizens. Modern city dwellers and those who are looking to relocate to cities intuitively understand and are attracted to places based on these principles. Cleveland’s commitment to healthy, sustainable, and walkable neighborhoods will be the cornerstone principle of all new zoning tools. As new and revitalized neighborhoods emerge, these new zoning tools will reset the default for the urban form in Cleveland.

The Cleveland City Planning Commission (CPC) and its partners inside and out of City Hall have been unified in their support for tools that ensure a quality built form while consolidating zoning processes. By simplifying requirements, formatting and vocabulary the CPC has been successful in creating codes that architects and planners can easily understand and implement. Reduced or eliminated parking requirements allow for market driven parking ratios. Increasing height districts, removing setback and floor area requirements has led to the creation of more density by-right. These kinds of changes have resulted in a streamlining of zoning reviews that move developers from application to permit faster than ever before.

### **Downtown Cleveland: “The Neighborhood”**

Real neighborhoods offer places where people can live, work, play, learn, and shop in a well-connected environment. Downtown Cleveland is more than our Central Business District; it is a place that combines all the pieces that make a real neighborhood.

#### **Live:**

Downtown grew at 180 households annually from 2000 to 2014, while new inventory expectations are an average of 550 units in the next ten years. Recent construction has been pre-leasing at roughly 95% and nearly all residential vacancy exists in buildings constructed prior to 2011 suggesting a market for “new” product. That being said, absorption should be monitored as the next wave of residential buildings come online (1,100 buildings by 2017).

#### **Shop:**

The Downtown retail market has grown in supply by roughly 2,000 square feet per year in the past five years, while absorption of retail space has been roughly 16,000 square feet annually (eight times supply) in the past five years. Vacancy rates during this timeframe decreased 100 basis points from 7% to 6%, near the historic average vacancy rate for Downtown retail space. While the Downtown population is growing, demand is still modest and current retail supply appears to meet demand. A lack of national brand presence as well as older and possibly unresponsive retail suggests the potential for a distinctive retail package that serves not only Downtown residents, but Downtown visitors.

**Work:**

Class A office absorption has ranged between 100,000 to 150,000 square feet in the past two years (more than twice the 10-year average), while only one Class A building has been added to the market in the past 10 years. This is the 550,000 square foot (RBA) Ernst and Young Tower, located at Front and 10th. It does not appear that the trend of employers migrating to Downtown from the suburbs has greatly impacted Cleveland's Downtown yet, as it has in other cities. The trend of corporations moving from the suburbs to the city is likely to create additional demand for Downtown and would be a "game changer" for development activity for all uses.

**Learn:**

Cleveland is extremely competitive with respect to STEM employment; however there are significant job opportunities nationwide with respect to careers that demand STEM education that are unfilled. STEM education is a definite pathway to employment opportunities if provided at the appropriate scale to meet the employment demand. When we think about the type of companies we want in Cleveland to leverage land resources that we make available, those companies must be matched with the appropriate labor force. In addition, matching the right labor force with the right employers and ensuring that the two are near can help improve conditions in our community. Cleveland is becoming a knowledge economy and is capitalizing on STEM education to meet the employment demands of the 21st century.

**Play:**

Downtown Cleveland hosts natural and built amenities that provide recreational resources for its residents. These include but are not limited to:

- » **Waterfront Access.** Cleveland is maximizing public access to the lakefront, riverfront, and stream valleys, including safe and convenient access from nearby neighborhoods for pedestrians and bicyclists.
- » **Waterfront Recreation.** Cleveland continues to develop and expand publicly accessible recreation sites along the Lake Erie waterfront and Cuyahoga River Valley.
- » **Bikeways.** Cleveland has developed a comprehensive network of bicycle routes, bicycle lanes, and multi-purpose trails, safely linking neighborhoods to recreation sites, schools, shopping areas, places of employment and other destinations throughout the City and the region.
- » **Bicycle and Pedestrian Amenities.** Bicycle racks, benches, water fountains and other amenities are being provided to encourage bicycling and pedestrian travel throughout the City.

**Cleveland is:**

- » a national leader in **biomedical technology** and **information technology** – with connections to the Cleveland Clinic, University Hospitals, Case Western Reserve University, NASA, and other world-class innovators
- » a center for **advanced manufacturing** – a national model for connecting new technologies to traditional industries
- » a community with connections to **good jobs for all residents** and connections to the education and training demanded by those jobs
- » a city known for **safe neighborhoods** that are **family-friendly** and **senior-friendly**, with **first-class city services** provided to all residents
- » a pioneer in improving **public education** through partnerships to provide resources based on the needs of students rather than the wealth of communities
- » a city known for its **accessible lakefront and riverfront**, connected to waterfront neighborhoods and unique recreation opportunities

- » a city of **vibrant urban neighborhoods**, with mixed-use districts and “live-work” spaces that attract creative and entrepreneurial individuals from across the region and the nation
- » a community where racial, ethnic and social **diversity** is not simply tolerated but is embraced and celebrated in every neighborhood as one of Cleveland’s greatest assets
- » a mecca for **arts and culture**, with world-renowned institutions like the Cleveland Orchestra and the Cleveland Museum of Art joined by a vital local arts scene and public art in neighborhoods throughout the city
- » a model for **healthy living** and **sustainable development**, with walkable neighborhoods, bike routes, ecological design, and community partnerships to provide recreation opportunities to Clevelanders of all ages, incomes and ability levels

## EASY TO GET HERE EASIER TO STAY



### FLY TO CLEVELAND

Cleveland Hopkins International Airport (CLE) will see almost 9 million passengers walk through the doors in 2017 and is a short 12-mile ride to and from downtown Cleveland. With 155 daily nonstop departures, CLE offers service to 50 nonstop markets from 9 different airlines including Air Canada, Allegiant, American, Delta, Frontier, JetBlue, Southwest, Spirit and United.

Airfares to Cleveland have plummeted with

the launch of new service from ultra-low cost and low cost airlines. CLE is the only medium sized airport in the country with service from Allegiant, Frontier, JetBlue, Southwest and Spirit. CLE offers a variety of airport transportation including rideshare options such as Lyft and Uber, taxicab and limo services or car rental. The RTA Red Line train departs the airport terminal every 15 minutes and arrives downtown at the Tower

City Center, for just \$2.75 each way.

Need more options? Try Cleveland Burke Lakefront Airport (BKL) the area's premier corporate and general aviation airport located in downtown Cleveland and its service on Ultimate Air Shuttle or Akron-Canton Regional Airport (CAK), located 53-miles southeast of downtown Cleveland with service from American Eagle, Delta, Spirit and United Express.



### WALKABLE DOWNTOWN

An urban landscape designed to be walked, leave one of 18 downtown hotels for no more than a 15-minute walk to the Huntington Convention Center, multiple attractions including the Rock and Roll Hall of Fame, JACK Cleveland Casino and more than 100 restaurants.



### TOO CLOSE FOR DISCOMFORT

Located within 500 miles of 43 percent of the U.S. population, Cleveland is situated at the intersection of three major interstate highways, making it a straight shot for attendees making the trek into downtown.

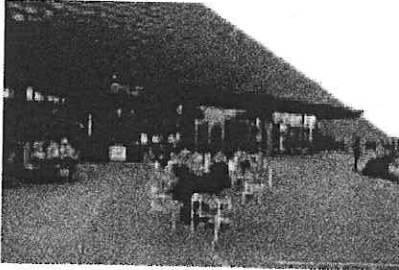


### NO CAR NEEDED

The Greater Cleveland Regional Transit Authority (RTA) provides free trolley services around the city. Inside CLE, attendees have the option of riding one of RTA's four free trolleys that operate nights and weekends. Trolley hours: B & E-Line, M-F 7am-7pm. C-Line, M-F 7pm-11pm and Sat/Sun 11am-11pm.

# NORTHEAST OHIO QUALITY OF LIFE AMENITIES

## DOWNTOWN CLEVELAND



### Rock and Roll Hall of Fame

Rock and Roll Hall of Fame is the place to be schooled in rock & roll.

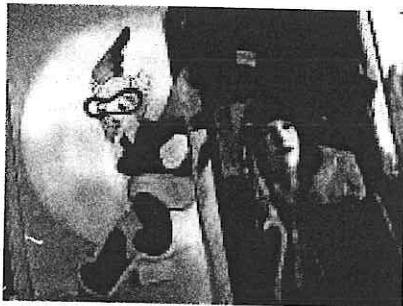
The Rock and Roll Hall of Fame tracks the evolution of this musical and cultural phenomenon through more than 50 exhibits. There's Janis Joplin's psychedelic Porsche, Michael Jackson's sparkly glove, the awning from CBGB's, the scribbled lyrics of ideas that morphed into classics, and dozens and dozens of iconic instruments. With more than 312 inductees, the largest collection of musician's memorabilia in the world and an induction ceremony every other year, this is one of the biggest reasons why Cleveland Rocks.



### Great Lakes Science Center

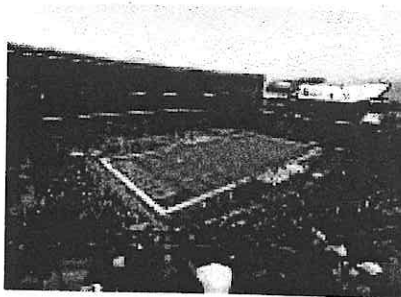
Great Lakes Science Center is the place for the curious to discover and learn.

What's it like to travel to space? Can you really create a mini tornado? How do MRI machines work? Great Lakes Science Center tackles these and other questions through hundreds of cool exhibits that make science, technology, engineering and math come alive for people of all ages. Geek out with more than 340 interactive science exhibits and a six-story OMNIMAX theater. Sitting on the edge of Lake Erie is a museum waiting for you to discover!



### International Women's Air & Space Museum

International Women's Air & Space Museum is the place to learn about the women of flight! Discover the achievements of women in aviation and space through exhibits that include an aerobatic plane and a hands-on mission control console and an on-site library! Artifacts from women who have made an impact in air & space including Amelia Earhart, Ruth Nichols, Bessie Coleman, Harriet Quimby, Katharine Wright, the WASP, Jackie Cochran and more are found in this FREE museum! What began as a committee to collect and preserve memorabilia of women pilots, known as The Ninety Nine's formed in 1929, later became the museum it is today in Cleveland, Ohio.

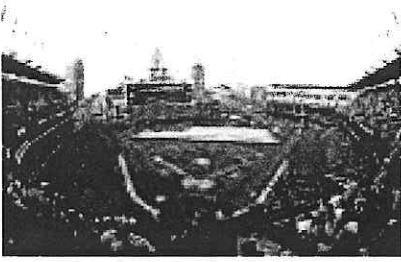


### First Energy Stadium

First Energy Stadium is home of the Cleveland Browns and more!

The Cleveland Browns are rolling out the orange carpet to welcome you and your guests to our unique venue. We offer 11 exclusive locations to host your next gathering. From the breathtaking views of Lake Erie to the spectacular views of the city lights, the Stadium provides exquisite backdrops to enhance your event. Not only is it home to the NFL Cleveland Browns, but it has hosted a variety of events including U2's sold-out The Joshua Tree Tour concert, 2017 CONCACAF Gold Cup and the 2015 Women's World Cup rematch.

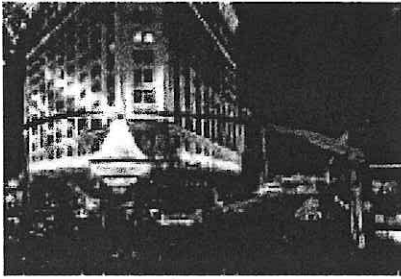
From sporting events to rock concerts, this stadium can hold 67,895 people! Adjacent to the Great Lakes Science Center, Rock and Roll Hall of Fame and the Greater Cleveland Regional Transit Authority's Waterfront Line, the stadium isn't alone!



### **Progressive Field**

Progressive Field thrills fans with food, fun and of course great baseball.

Fan exuberance is a big part of the fun. Progressive Field ranked as the No. 1 fan favorite baseball stadium in a Sports Illustrated poll. The sense of history and "baseball intelligence" of home fans helped push the stadium to the top. The home of the Cleveland Indians offers gourmet food options that highlight local favorites like Ohio City Burrito, Cleveland Pickle and Melt Bar and Grilled.



### **Playhouse Square**

Cleveland's Playhouse Square is home to one of the largest performing arts centers in the U.S. The country's largest performing arts center outside of NYC, it hosts over 1,000 Broadway shows, dance shows, comedy shows, musical concerts and special events annually. Playhouse Square's theatres and grand lobbies play host to hundreds of business and social events each year, from pre-show cocktail parties to elaborate awards dinners, fundraisers and weddings. In addition, the Idea Center building boasts state-of-the-art broadcast, recording and streaming capabilities for business and conference events.



### **Public Square**

Public Square is the heart of Downtown Cleveland.

Cleveland's Public Square was designed with people in mind. The newly renovated park is 10 acres featuring a central cafe, a water fountain, an ice rink, a lush lawn with a natural amphitheater, the KeyBank walking promenade, a speakers' terrace, and much more. Public Square is Cleveland's city center where downtown employees spend their lunch hour, downtown residents play with their families and the community gathers for activities.



### **Quicken Loans Arena**

Quicken Loans Arena is home to champion sports teams and huge concerts.

Home to the Cleveland Monsters, the Cleveland Gladiators and the 2016 NBA Champion Cleveland Cavaliers, The Q is always home to an entertaining show. Also the place to be for the hottest concerts on stage, including Paul McCartney in 2016 and Lady Gaga in 2017, The Q was recently ranked 11th in the nation for concert ticket sales. The venue attracts the most spectacular family shows under one roof and signature sporting events. The Q brings the total sports and entertainment experience to Downtown Cleveland.



### **Jack Casino**

Jack Casino is voted one of the best attractions in Northeast Ohio for gaming and nightlife. As the area's only full-service casino, JACK Cleveland was recently voted Northeast Ohio's Best New Attraction. The casino features more than 96,000 square feet of non-stop action with 125 table games and a 30-table poker room. The casino's world-class dining options include The Buffet, voted Cleveland's best two years in a row, and a food court full of local flavor. An excellent downtown Cleveland nightlife choice, JACK has an intimate, elegant bar on the first level next to all the gaming action. Stop by and enjoy a selection of beer, wine, cocktails and premium spirits.

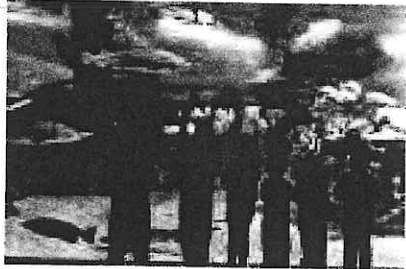


## FLATS/RIVER



### Flats East Bank

The Flats East Bank is a new 23-acre mixed-use waterfront development along the mouth of the Cuyahoga River. The property features a 23-story, 500,000 square foot office tower; a 241-unit residential building; Aloft hotel; and a range of local restaurants and entertainment venues situated across a 1,200-foot riverfront boardwalk. The next phase of this development proposes a movie theater, street level retail and up to 100 additional residences.



### Greater Cleveland Aquarium

Located inside The Powerhouse, a late 19th century brick landmark that generated electric power for Cleveland's streetcar lines, the aquarium is a great family amenity, home to saltwater animals and glow-in-the-dark jellyfish. The building's old coal tunnel houses exhibits where brave can stroke stingrays as they glide by. The aquarium features 5,000 creatures, including everything from Great Lake perch to more exotic lionfish, sea anemones, crustaceans and sea horses. A 230,000-gallon SeaTube is home to sharks, stingrays, moray eels and saltwater fish which swim above and alongside visitors. This very cool, walk-through tunnel stretches for 175 feet.



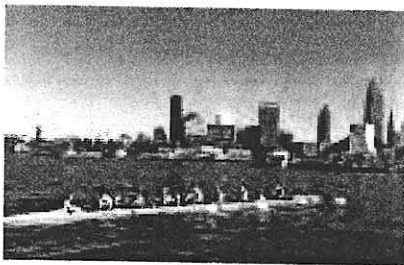
### Jacobs Pavilion at Nautica

A popular riverside outdoor concert venue, Jacobs Pavilion at Nautica plays host to some of the summer's hottest concerts and special events in the Cleveland area. Nautica Entertainment Complex has attracted millions of people annually. Superstar artists including Ringo Starr, Paul Simon, Britney Spears, John Legend, The Black Keys and Avett Brothers have performed at this 5,000-seat entertainment venue.



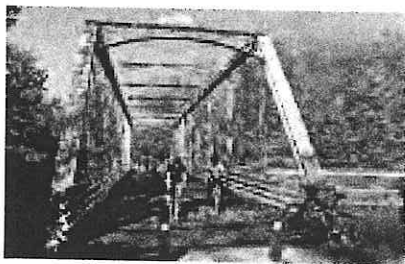
### Metroparks Water Taxi

This 26-foot canopied boat shuttles 17 passengers and up to four bicycles on a first-come-first-served basis. ADA accessible and dog-friendly, the cost is \$2 a day for unlimited trips. Board and travel with ease from both the East Bank or West Bank of The Flats.



### The Foundry

The Foundry is a Boathouse Project that includes a shared-use park, fitness center, and collegiate and youth rowing and sailing programs for it is situated in an up-and-coming neighborhood rapidly changing from exclusively industrial with the occasional retail space to a truly mixed-use area. The Foundry's vision is a training center featuring robust, useful amenities to help individuals become athletes, particularly in the sports of rowing and sailing. The focus of The Foundry is on high-school and collegiate aged individuals from all walks of life in the Greater Cleveland area. The Foundry aspires to foster a safe, healthy space in downtown Cleveland, accessible by everyone who desires to improve themselves and is willing to commit to the requirements of these sports.

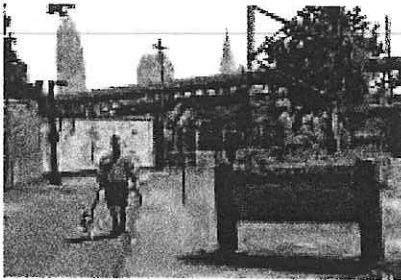


### The Ohio & Erie Canal Towpath Trail

Traveling north to south, The Ohio & Erie Canal Towpath Trail (or simply "The Towpath") takes visitors on a 101-mile journey through the park systems in the counties of Cuyahoga, Summit, Stark and Tuscarawas. Along the trail, you'll find historic buildings, museums, niche little villages, restaurants, pubs, incredible wildlife, retail and all that nature in Northeast Ohio has to offer.

Many folks opt to join the trail within the Cuyahoga Valley National Park, which is an astounding attraction within itself. While the path picks up in various locations within the national park, many find that the central location of Independence, Ohio is a perfect start.

What's even better about traveling through the Cuyahoga Valley National Park is that riders can bike in one direction and then head back aboard the vintage Cuyahoga Valley Scenic Railroad. The Towpath is built along a former canal that was built between 1825 and 1832 to transport goods between Cleveland (where goods came in through Lake Erie) and Portsmouth, Ohio along the Ohio River.



### **Cleveland Foundation Centennial Trail**

The Cleveland Foundation Centennial Lake Link Trail is a 1.3-mile abandoned railroad right-of-way in Cleveland's industrial river valley Flats neighborhood that has been transformed into a multi-modal trail and natural storm water management system. The trail connects with the Towpath trail at the southern end of Scranton Peninsula and traverses through the west bank of the Flats, eventually landing in Wendy Park on Lake Erie. When completed, the Cleveland Foundation Centennial Trail will make a critical connection between Cleveland's downtown neighborhoods and the vast Lake Erie.

## **CLEVELAND NEIGHBORHOODS**



### **AsiaTown**

AsiaTown Cleveland is a unique dining and cultural destination. The vibrant neighborhood boasts more than two dozen Asian restaurants and markets, making it the best place to head for amazing dim sum or pho. It's also home to Night Market Cleveland, a monthly summer time event with roots in the Asian tradition of ghost markets. This must-see experience attracts nearly 10,000 people and 100 vendors who come together to sell goods and food.



### **Shaker Square/Larchmere**

As the oldest shopping district in Ohio, historic Shaker Square provides entertainment day and night. To get there, visitors can drive or take advantage of the two light-rail rapid transit lines that pass through the square. Enjoy free music during the summer long outdoor concert series, eat a fine French meal at Edwins Restaurant, and then head over to Shaker Square Cinemas to grab a beer and catch a movie in the beautiful art-deco theater.



### **Larchmere**

Located just one block north of Shaker Square, Larchmere Boulevard is the place to go for fine art and charming antique shopping. Peruse the latest titles at Loganberry Books, a favorite local independent bookstore. Take your time choosing your next meal at one of the many unique dining options such as Felice and Batuqui – both Victorian homes converted into restaurants – or an old-time establishment like the 80-year old Academy Tavern.



### **Coventry Village**

Once known as the place to find Cleveland hippies, Coventry now provides a mix of eclectic eateries and shops catering to young and old alike. Art supplies, vintage toys and vegetarian food are offered alongside books, Birkenstocks, coffee shops, restaurants, and live music. The diversity of the neighborhood brings together everyone from purple-haired punk rockers, to elderly Russian immigrants, to students from Case Western Reserve University and John Carroll. The community thrives on this diversity and the business district offers a view into the makeup of distinct people of the area.



### **Cedar Lee District**

Whether you're a foodie, a film buff or just looking for a family-friendly place to eat, shop, or be entertained, the Cedar Lee district is the perfect destination. The historic Cedar-Lee Theatre features independent films and is known for its monthly midnight screenings of The Rocky Horror Picture Show. More into live theater? Head down the street to Dobama Theatre to see the premiere of some of the best contemporary plays by established and emerging playwrights.



### **Collinwood/Waterloo Arts District**

Collinwood is home to several music venues and shops like Blue Arrow Records, where you can pick up vintage vinyl and music memorabilia. Perhaps the most famous venue is Beachland Ballroom and Tavern – an old Croatian ballroom turned into an indie music mecca. The Beachland has hosted everyone from Arcade Fire to the Cramps, but its casual neighborhood locale keeps the iconic venue an understated, but must-see destination.

The flourishing Waterloo Arts and Entertainment District is also a cornerstone of the Collinwood neighborhood. Funky and eclectic bars, thought-provoking art galleries, and some of the coolest street art in Greater Cleveland attracts visitors from all over the region. Sip a locally roasted brew at Six Shooter Coffee, savor a wood-fired pizza from Citizen Pie, or grab a craft beer at the enchantingly named Millard Fillmore Presidential Library.

### **Near West Cleveland Neighborhoods**

Several neighborhoods adjacent to Downtown comprise Cleveland's Near West Side, including Ohio City, Tremont, and Detroit Shoreway. Each neighborhood has a unique identity and is rich with amenities and cultural staples, restaurants, shops and handmade goods.

#### **Tremont**

Minutes from downtown, Tremont is one of Cleveland's oldest communities. Explore the old cottages, neighborhood dive bars, beautiful churches, and cordial local characters. Look closer and notice come-as-you-are bars sandwiched between Food Network famous restaurants, art galleries, and even a pop culture monument: A Christmas Story House and Museum. If you find yourself in this neighborhood on the second Friday of the month, you can get to know the neighborhood's creative side through Walkabout Tremont: a monthly celebration with street performers, pop-up art, neighborhood walking tours, and much more.



#### **Detroit Shoreway**

A quickly growing retail and art scene is emerging in Detroit Shoreway. Galleries fill once empty warehouses. Boutiques and shops have replaced dives. And antiquing is everywhere, especially along Lorain Avenue. Detroit Shoreway's Gordon Square Arts District is the city's bohemian quarter. Check out an indie film at Capitol Theatre, an experimental production at Cleveland Public Theatre, or a family-friendly play at Near West Theatre. Build your own hot dog (with up to 50 toppings!) at Happy Dog or graze on some locally sourced homegrown food at Spice Kitchen + Bar. You don't want to miss 78th Street Studios – an artist residence and gallery – with its monthly "Third Friday" showcases.



#### **Ohio City**

Foodies and fans of craft beer call Ohio City's Market District their urban oasis. Just across the Cuyahoga River, west of downtown, the city's West Side Market has been home to haggle-friendly meat, seafood, and veggie vendors for more than 100 years, but it's Ohio City's Victorian-era homes, boutique eateries, and famous craft brewers (like Great Lakes Brewing Co.) that have made it one of the city's symbols for urban renewal. Be sure to check out the entrepreneurial and arts district of Hingetown, which "hinges" the neighborhoods of Ohio City and Detroit Shoreway.



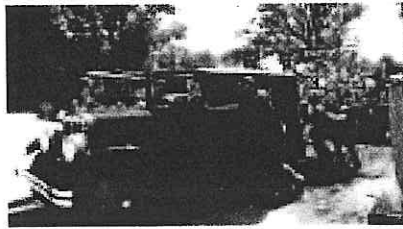
## UNIVERSITY CIRCLE

An arts and culture district of Cleveland, recently named by Forbes Magazine as one of the ten prettiest communities in the country.



### **Cleveland Cultural Gardens**

The Cleveland Cultural Gardens is a collection of over 254 acres of public gardens that celebrate the rich ethnic diversity in Cleveland. As part of Rockefeller Park, land donated by John D. Rockefeller, Cleveland Cultural Gardens consist of 39 distinct gardens featuring iconic statues and a variety of landscaping that commemorates the culture and countries for which the garden is named.



### **Cleveland History Center Museum of the Western Reserve Historical Society**

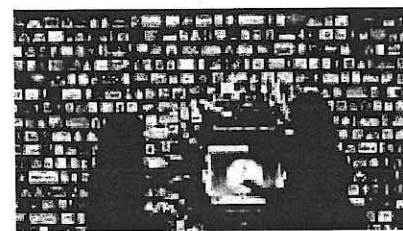
The Western Reserve Historical Society is Cleveland's oldest existing cultural institution housing exhibits that tell the story of Northeast Ohio through items, documents and artifacts from a variety of collections. Visitors are invited to discover the American experience by exploring the tangible history of Northeast Ohio. Today, the Cleveland History Center houses the Research Library, the Crawford Auto Aviation Museum, the Chisholm Halle Costume Wing (home to fashion exhibits), two historic mansions, Kidzibits Family Hands-on Gallery, and they operate the

90 acres of Hale Farm and Village, homestead of Jonathan Hale in Bath, Ohio, which is a living history museum depicting life in the 19th century through agricultural practices and everyday craft and trade demonstrations such as glassblowing, pottery, spinning and weaving, and more.



### **Cleveland Institute of Art**

CIA is one of the nation's leading independent colleges for art and design. With approximately 550 students, CIA offers a personal educational experience with the benefits of a larger institution. For 135 years, the college has been an educational cornerstone in Cleveland, Ohio, producing graduates competitive as studio artists, designers, photographers, contemporary craftsmen, and educators.



### **Cleveland Museum of Art**

The Cleveland Museum of Art, ranked as one of the top comprehensive art museums in the country, is renowned for the quality and breadth of its collection. Free of charge to all visitors, the museum's permanent collection includes almost 45,000 objects and spans 6,000 years of achievement in the arts. Having recently completed an ambitious, multi-phase renovation and expansion project across its campus, the museum is a significant international forum for exhibitions, scholarship, performing arts, and art education. The campus also features two dining facilities.



### **Cleveland Museum of Natural History**

From dinosaurs to diamonds, the museum is a beautiful blend of traditional and interactive galleries related to history, art and the natural world. Experience the unexpected at the all-new Perkins Wildlife Center, where soaring walkways wind through a wild forest, stunning views of wildlife are found all around and immersive experiences put you closer to Ohio nature than ever before.



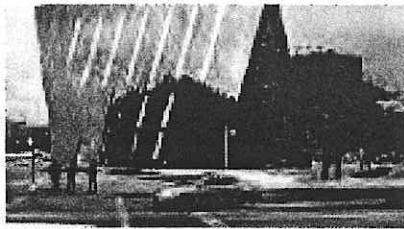
### **Dittrick Medical History Center & Museum**

The Dittrick Medical History Center is dedicated to the study of the medical past through a distinguished collection of rare books, museum artifacts, archives, and images. The Center originated as part of the Cleveland Medical Library Association (est. 1894) and today functions as an interdisciplinary study center within the College of Arts and Sciences of Case Western Reserve University.



### **The Sculpture Center**

The Sculpture Center is a not-for-profit arts organization with a mission unique to this country of supporting the careers of emerging sculptors of Ohio and our greater region and encouraging the preservation of Ohio public outdoor sculpture. The Sculpture Center exhibits the highest quality contemporary sculpture by rapidly rising, mid-career, and established artists with a focus on artists of our region. We value risk taking and an exploration of new avenues of creativity by every artist. New artwork is created especially for all our curated exhibitions.



### **MOCA Cleveland**

Cleveland's Museum of Contemporary Art (MOCA) plays an urgent and exciting role in the city's cultural landscape. As a non-collecting institution and the region's only contemporary art museum, MOCA is ever-changing, introducing new exhibitions three times a year and creating fresh experiences for visitors each season. Since its founding in 1968, MOCA has presented the works of more than 2,000 artists, often through artists' first solo shows.



### **Cleveland Institute of Music**

The Cleveland Institute of Music is a premier conservatory devoted to training the next generation of classical musicians. The internationally acclaimed faculty is comprised of practicing musicians, award-winning composers and audio recording producers, published academics, sought-after lecturers and members of The Cleveland Orchestra.



### **Severance Hall/Cleveland Orchestra**

As it celebrates its centennial, The Cleveland Orchestra is acknowledged among the world's very best orchestras. The Orchestra performs at Severance Hall, a nationally registered historic building, regarded by many music-lovers as one of the world's most beautiful concert halls. The beloved Cleveland Orchestra has always shared its love of classical music with the general public through school programs and outdoor summer concerts but, in recent years, in attempt to build new and younger audiences, these elite musicians also hold "residencies" in Cleveland's funkier neighborhoods that feature a string of free performances in unexpected places.



### **Cleveland Botanical Garden**

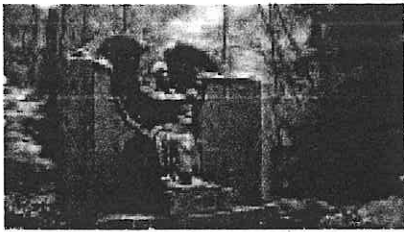
Garden guests enjoy delightful surprises, quiet moments, and lots of fun as they explore 10 acres of beautiful outdoor gardens and the 18,000-square-foot Eleanor Armstrong Smith Glasshouse. Your Glasshouse adventure takes you into the Costa Rican rainforest full of lush plants, butterflies, and birds, as well as to the spiny desert of Madagascar, where prickly plants, out-of-the-ordinary blooms, and wonderfully weird plants and animals welcome you.



### **Case Western Reserve University**

With almost 12,000 students from over 81 countries, Case Western Reserve University is ranked 37th among national universities. In research labs and lecture halls, CWRU spends each and every day asking—and discovering—how to solve the biggest issues of today and tomorrow. From stopping cancer in its tracks to reversing symptoms of Alzheimer's disease, from preventing school violence to understanding how businesses work, groundbreaking research takes place daily on this campus.

In addition, Case Western is among the top 25 LGBT Friendly colleges in the United States.



### **Lake View Cemetery**

The largest and most significant graveyard in the state of Ohio, the park-like Lake View Cemetery is known as Cleveland's outdoor museum and is a memorial to those who built Cleveland. The 285 breathtaking acres of original architecture and sculptures are the final resting place to titans of industry like John D. Rockefeller and Henry Sherwin, politicians and civic leaders such as President Garfield and Elliot Ness and descendant of slaves such as inventor Garrett Morgan. So many Italian stonemasons and gardeners immigrated to Cleveland to work in the cemetery that the neighborhood they formed, Little Italy, still exists and thrives nearby.



### **Little Italy**

Known for its art galleries and the finest authentic Italian cuisine, Little Italy became an iconic Cleveland neighborhood in the 1800s when Italian sculptor Joseph Carrabelli and many Italian families came to Cleveland to work. Today the traditions hold strong with the rich cultural heritage and the spirit of artistry with over 20 galleries, 15 restaurants, and many professional-service businesses. Thousands of visitors and loyal patrons come to dine, shop and be entertained as Little Italy is in walking distance of University Circle's arts and culture institutions.



### **Wade Oval**

Wade Oval is one of northeast Ohio's premier public spaces, home to events year-round like WOW! Wade Oval Wednesdays, Parade the Circle & Circle Village, and the Rink at Wade Oval.

## **AKRON**



### **Stan Hywet Hall & Gardens**

Stan Hywet Hall & Gardens is the former American Country Estate of F.A. Seiberling, co-founder of The Goodyear Tire & Rubber Company. The estate includes five historic buildings featuring a 65-room Tudor Revival Manor House, Gothic Revival Conservatory, Gate Lodge (birthplace of Alcoholics Anonymous) and eight historic gardens on 70 acres. The collections and furnishings in the Manor House are all original. Stan Hywet is Akron's first and largest National Historic Landmark at 64,500 square feet and is also the nation's 6th largest historic home open to the public.

## **CANTON**

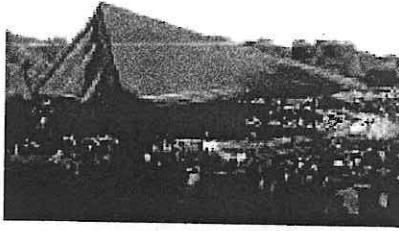


### **Pro Football Hall of Fame**

The Pro Football Hall of Fame is located in Canton, Ohio, the birthplace of the American Football Association, later renamed the National Football League. The Hall features a multitude of experiences with the most emotional stop on the tour being the Hall of Fame Gallery, which houses the bronze bust of each person enshrined.

The museum's interactive exhibits are some of its most popular where visitors can complete a pass in a throwing cage, play some EA Sports Madden Football, compete in a trivia challenge and yell at the screen in the Super Bowl Theater. For those who watch football, play football and otherwise bleed football, life won't be complete without a trip to the Pro Football Hall of Fame.

## CUYAHOGA FALLS



### **Blossom Music Center**

Blossom Music Center is an outdoor amphitheater and summertime home to the Cleveland Orchestra. This venue hosts a full schedule of popular concerts in the summer, a restaurant, art gallery, outstanding gardens and beautiful picnic areas, which is why it's considered one of Northeast Ohio's favorite music venues.

### **Cuyahoga Valley National Park**

Cuyahoga Valley National Park lies between Cleveland and Akron and is comprised of over 33,000 acres of things to do and see. The park is a refuge for native plants and wildlife, and provides routes of discovery for visitors. The winding Cuyahoga River gives way to deep forests, rolling hills, and open farmlands. Several places in Cuyahoga Valley National Park highlight the cultural and natural history of the valley, including:

#### » **Brandywine Falls**

The Cuyahoga Valley's waterfalls are among the most popular attractions in the national park. Brandywine Falls is a 65-foot waterfall and is the centerpiece of the falls area. The falls once powered a thriving village, later industry, and eventually an artist's colony.

#### » **Canal Exploration Center**

The building known as the Canal Exploration Center has stood at Lock 38 for over 150 years. It has been a tavern, a store, a residence, a boardinghouse, and even housed a blacksmith shop at one time! It most recently was a park visitor center. The Canal Exploration Center features a store selling goods reminiscent of the Canal Era. Interactive touchscreens allow visitors to navigate a canal boat through a lock, explore the nation's canal system, or eavesdrop on Canal Chat conversations.

#### » **Ohio & Erie Canal Towpath Trail**

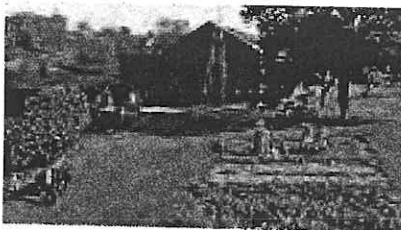
The Towpath Trail is a multi-purpose trail developed by the National Park Service, and is the major trail through Cuyahoga Valley National Park. This trail follows the route of the historic Ohio & Erie Canal, which connected the natural resources of the United States interior with its markets on the eastern seaboard. From the trail you can make connections to many of the natural and historic sites in the park and to other trails that intersect it along the way.

### **Hale Farm and Village**

Halfway between Akron and Cleveland, Hale Farm and Village is a working museum recreating the life of early 1800s. Today the attraction is part of the Western Reserve Historical Society and features a farmhouse, livestock, and 19th century artisan workshops, including candlemaking, glassblowing, pottery making, spinning, weaving and blacksmithing.



## HOLMES COUNTY



### **Amish Country**

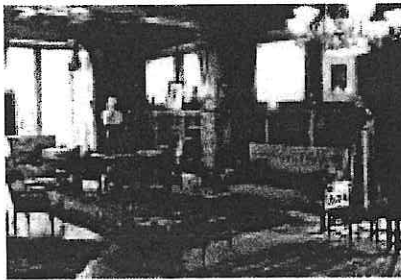
The largest concentration of Amish population in the world is two hours south of Cleveland, featuring skilled craftsmen, artisans, and organic farmers. Enjoy the pre-industrial age and experience the Amish lifestyle year-round through events, attractions, adventures, dining, shopping and recreation.

## LAKE COUNTY



### Wine Region

Northeast Ohio's Lake Erie shoreline is conducive to wine making and has a collection of local wineries which provide vintner based tours in season. Discover Ohio's award winner wineries amid the rolling hills of the Grand River Valley. Sample wines, and dine in incredible settings within a stone's throw of the gorgeous vineyards. Learn how Ohio wines are made, including the Lake Erie region's famous Ice Wine.



### James A. Garfield National Historic Site – Mentor

20th U.S. President James A. Garfield's home and museum is also known as Lawnfield. Here he conducted the first "front porch" presidential campaigns, giving speeches from the verandah. Reporters camped out on the lawns around the house which gave the property its name. Today, the porch serves as a gateway to the story of the Garfield family. Visitors can experience the life of James A. Garfield through video, walking the grounds of the remaining parts of the Garfield's 160-acre farm, and touring the home that will take you back in time to the 1800's, the height of the Victorian era.

## SANDUSKY /LAKE ERIE ISLANDS

Home of the Roller Coaster Capital of the World, numerous indoor and outdoor waterparks, island hopping, boating, fishing, birding, local foods and tons of events, Lake Erie Shores & Islands are the ideal vacation destination. And, the fun lasts all year long – from enchanting fall festivals to ice fishing to unforgettable spring and summer getaways. This area features:

### » Cedar Point

The Roller Coaster Capital of the World

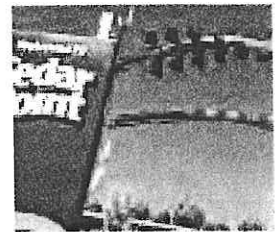
Cedar Point is the nation's top amusement park and 2nd ranked in the world, featuring 17 roller coasters, 70 rides, a waterpark, two resorts and other entertainment.

### » Kalahari Resort and Convention Center

This waterpark resort features an exciting mix of rides, slides and adventures in both indoor and outdoor waterparks.

### » Put-in-Bay

A two-by four-mile island is dotted with historic homes, the nation's third tallest monument, quaint restaurants and local pubs. Beautiful water surrounds Put-in-Bay where you will find the best walleye and perch fishing in the United States.



## WILLOUGHBY



### Holden Arboretum

With more than 3600 acres, this is among the largest arboretums in the United States and 30 minutes from Cleveland. It features over 120,000 documented plants in multiple ecosystems native to the region, more than 20 miles of hiking trails as well as a canopy tree walk and tower for viewing. It is an important bird migratory route noted by the Audubon Society for bird watching.



## CLEVELAND METROPARKS SYSTEM



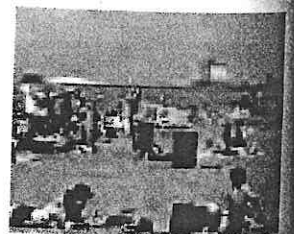
The Cleveland Metroparks system, known as the Emerald Necklace, consists of nearly 23,000 acres in 18 reservations, 100 hiking trails and 8 lakefront parks within three river valley water basins flowing into Lake Erie that ring the greater metropolitan area. The system provides seasonal recreational activities: bicycling, boating, hiking, horseback riding, kayaking, multiple playfields for outdoor sports, public golf courses, outdoor programmed education and events, rock climbing, cross country skiing, toboggan chutes, walking and enjoying the lakefront beaches. The lakefront parks are key bird migratory pathways and Audubon Society ranks some as top bird watching locations in the country. The park system includes the world class Cleveland Zoo with over 3,000 residents representing over 600 species in natural habitats such as African Savannah, Australian Outback, and Tropical Rainforest. It has one of the largest primate exhibits.

### BOATING MARINAS

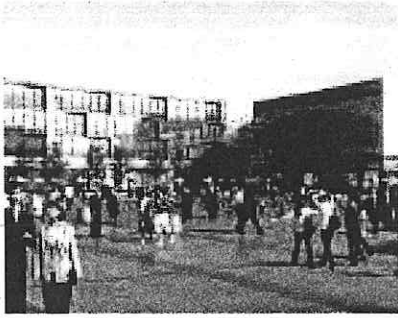
- » Bay Boat Club
- » Emerald Necklace Marina
- » Channel Park Marina
- » Forest City Yacht Club
- » Shoreby Club
- » Lorain Sailing & Yacht Club
- » Westlake Yachting Club
- » East Bank Marina
- » Grand River Yacht Club
- » Rocky River Marina
- » Edgewater Yacht Club
- » Olde City Yacht Club
- » East 55th Street Marina
- » Northeast Yacht Club
- » Spitzer Marina
- » Chagrin Lagoons Yacht Club
- » Lake County Yacht Club
- » Rivers Edge Yacht Club
- » Rocky River Bridge Docks
- » Edgewater Marina
- » Lakeside Yacht Club
- » Intercity Marina
- » Wildwood Marina
- » Spitzer Riverside Marina
- » West Channel Yacht Club
- » Mentor Harbor Yachting Club

### LAKEFRONT PARKS AND BEACHES

- » **North Coast Harbor**  
This area features a Rock and Dock downtown transient marina, paddle boat rentals, programmed events throughout the calendar year, the permanently docked William S. Mather Ore Boat museum and World War 2 era submarine the USS Cod, as well as river and lake cruises on the Goodtime or Nautica Queen.
- » **Mentor Headlands**  
Mentor Headlands is the longest beach in Ohio along the Lake Erie shores.
- » **Lakewood Park**  
This lakefront park in Lakewood features a pool, bandshell, skatepark, promenade, solstice steps and sport courts and fields.
- » **Edgewater Park Beach**  
This lakefront park west of downtown Cleveland features a pier, cabana rentals, fishing, beach house and programmed seasonal events.
- » **Huntington Beach**  
This lakefront park in Bay Village offers fishing, swimming, trails and the Lake Erie Nature & Science Center.

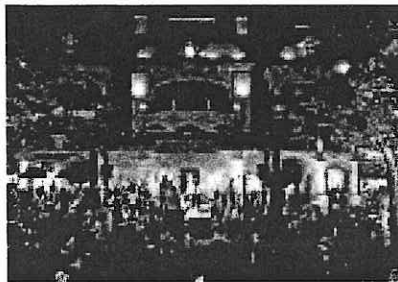


## SUBURBAN DEVELOPMENTS



### **Pinecrest**

Pinecrest is a 400,000-square-foot open-air town center opening in spring 2018. Pinecrest aims to attract retailers, restaurants and entertainment venues that are new to Northeast Ohio. Pinecrest will also eventually feature a 145-room AC Hotel by Marriott, 150,000 square feet of Class A office space, and 87 apartments, and a Silverspot Cinema. Current retailers committed to Pinecrest include Williams-Sonoma; Pottery Barn; West Elm; REI; Whole Foods Market; Vineyard Vines; Orangetheory Fitness; Vernacular; and Laura of Pembroke. Its restaurant line-up includes Shake Shack; Kona Grill; Red the Steakhouse; City Works Eatery and Pour House; Firebirds Wood Fired Grill; Bibibop Asian Grill; and Fusian.



### **Legacy Village**

Legacy Village is one of Northeastern Ohio's premier lifestyle centers located in the Cleveland suburb of Lyndhurst. Legacy Village features more than 55 restaurants and retailers, many of which are unique to the area including LL Bean, Nordstrom's Rack, Crate & Barrel, Arhaus Furniture and Capital Grille, just to name a few. Throughout the year patrons can enjoy live music events, farmers markets and more.



### **Eton**

Envisioned as Cleveland's answer to Rodeo Drive, the shopping lifestyle center's developer notes that this area has the strongest, most affluent demographic in five states. The trendy upscale Eton, a few miles from the upscale Legacy Village and Beachwood Place malls, has become a "shopping destination." The collection of shops at Eton now includes boutiques, restaurants and services, lined with lush landscaping, outdoor seating and even a life-sized chess board. Thanks to big-name draws, such as Trader Joe's, Apple, Barnes and Noble, Lululemon and Tiffany & Co., the parking lot is nearly always packed.



### **Beachwood Place**

Beachwood Place is Cleveland's destination for high-end shopping and luxury retail anchored by Nordstrom and Saks Fifth Avenue, which offer brands such as Prada, Gucci, Louis Vuitton, Chanel and Burberry. A 46,000-square-foot expansion of Beachwood Place recently occurred adding Altar'd State, Evereve, francesca's and Zara. Additionally, the Container Store opened its first Northeast Ohio location in spring 2017 at the refashioned La Place shopping center next to Beachwood Place mall.



### **Crocker Park**

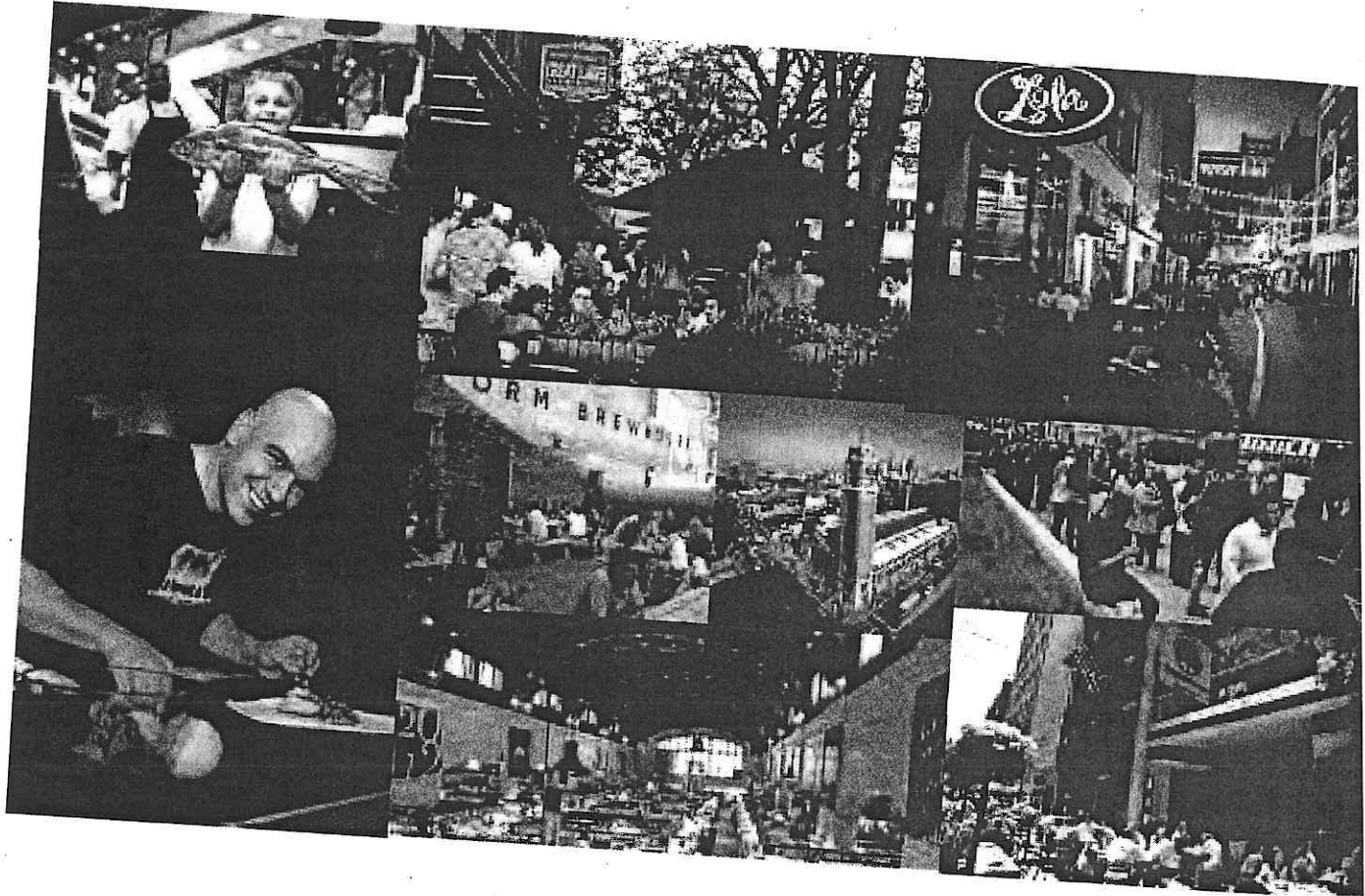
This lifestyle center includes more than a million square feet of restaurants and high end retail, as well as the American Greetings Creative Studios World Headquarters. It also is home to 318 luxury apartments and the 120-room Hyatt Place hotel and banquet center. Additional amenities include the Market Square civic center, Cantina Laredo, Cyclebar, Oliver & Henry Retail Dog Shop, Altar'd State, Carhartt, Beauty Brands, Athleta, Homage, Lululemon Athletica, Lush, Michael Kors, H&M, DSW, Orvis, Sur La Table, Teavana and The Limited. Throughout the year residents and visitors can enjoy programming including live entertainment and interactive activities.

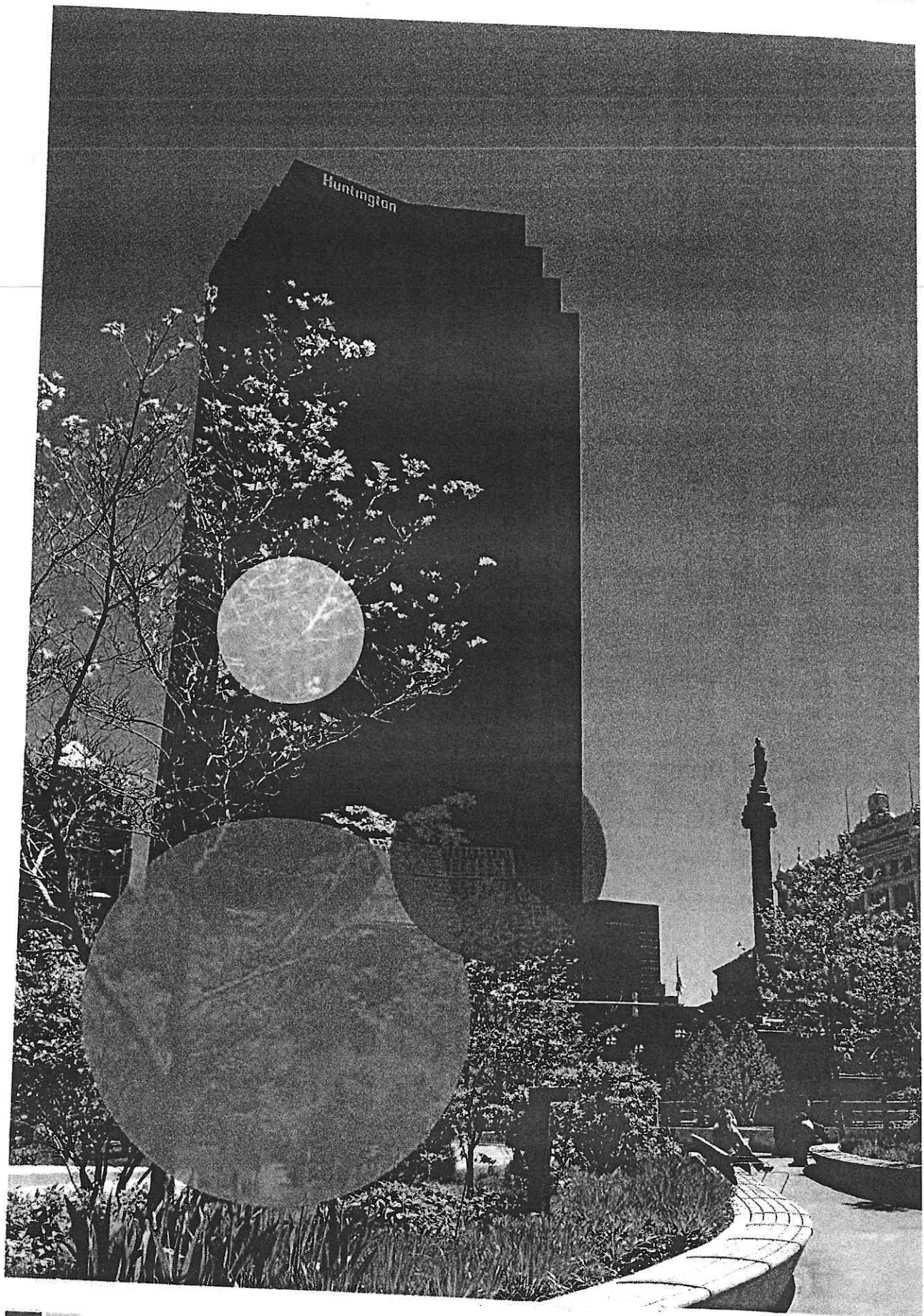
## CLEVELAND'S CULINARY SCENE

Cleveland has something for all foodies. The culinary scene is world class, reflecting our heritage with restaurants representing more than 1 ethnicities from immigrant owned neighborhood businesses to the true "Iron Chef," Michael Symon's Lola. From authentic Ethiopian cuisine to one of several James Beard Foundation Award winners, you won't go hungry.

To complement our food offerings, Cleveland is one of the top five beer cities in America. Our burgeoning local beer scene boasts more than 20 local breweries in the region. From microbreweries like Nano Brew to larger, growing operations like Great Lakes Brewery, there are so many great thirst quenching beers to try.

Cleveland also provides great access to fresh produce. With a thriving farm to table industry, there are more than 80 farmer's markets in Northeast Ohio. Cleveland's crown jewel of the food movement is the West Side Market – a public market that has provided fresh produce, handmade cheeses, and fresh meats for over 100 years.








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# Q2 2017 QUARTERLY SUMMARY

## DOWNTOWN CLEVELAND Q2 ATTRACTS TRANSIT CHANGES

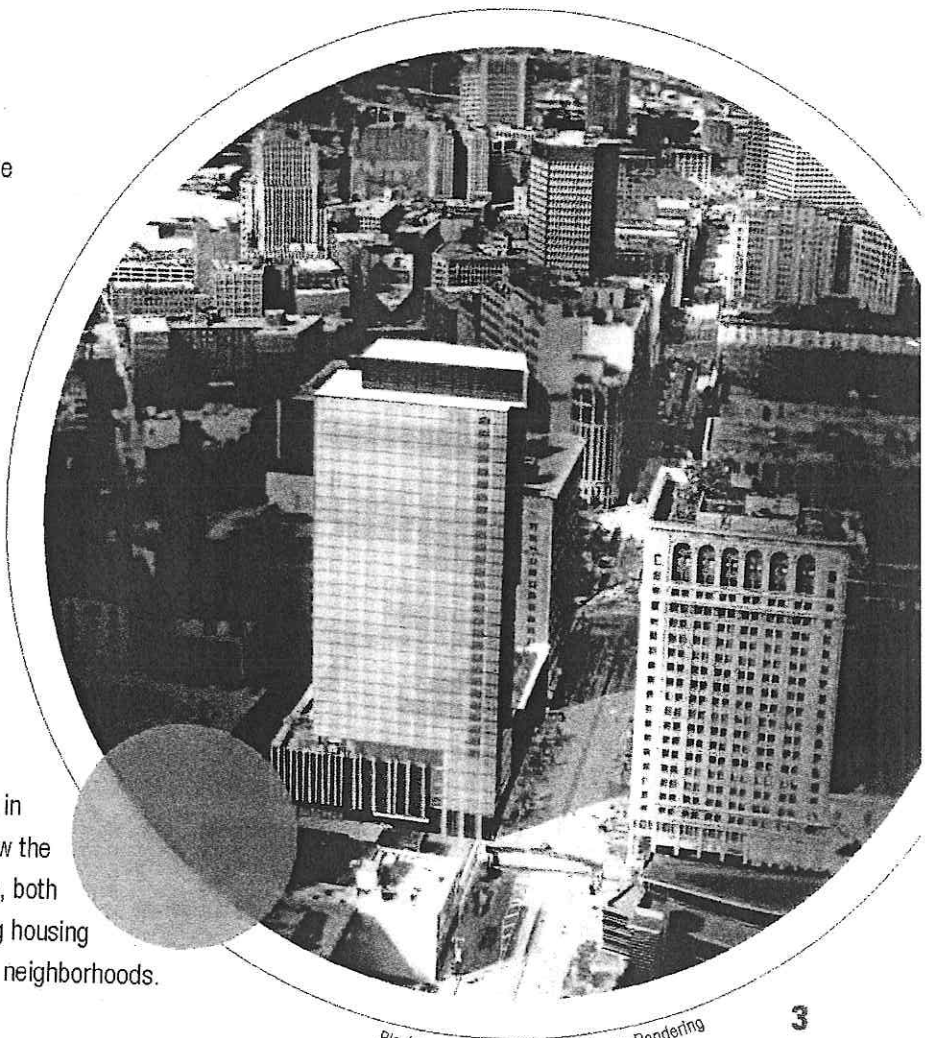
Downtown Cleveland is the premier location for employers seeking a leg up in talent recruitment and retention because of its many amenities, including transportation options.

In the second quarter of 2017, Downtown Cleveland made strides to connect our collection of vibrant downtown neighborhoods to each other and the surrounding areas. Improvements to transit create strong, pedestrian connections. Increasing access to public transit and a growing number of other transit options provides accessibility to surrounding neighborhoods and connects those neighborhoods to the growing number of jobs in Downtown Cleveland. This quarter, Greater Cleveland Regional Transit Authority (RTA) and Northeast Ohio Areawide Coordinating Agency (NOACA) continued to build their offerings to downtown workers and residents.

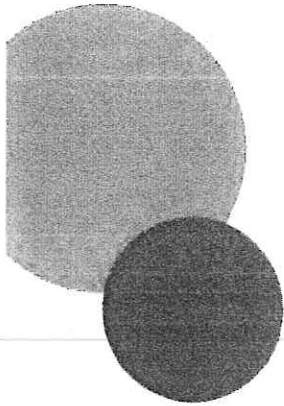
Downtown's transportation options and other amenities allow organizations to use a Downtown Cleveland office location as a recruiting tool. In Q2 2017, Robots and Pencils and NRP Group both announced relocations into Downtown Cleveland to gain access to talent and the amenities in the city center.

### **Additional Q2 2017 highlights include:**

- » NRP Group announced the relocation of their corporate headquarters from the suburbs to Downtown.
- » Playhouse Square announced plans for a 34-story apartment building.
- » Three residential projects in the downtown area were awarded historic tax credits.
- » Three national restaurant chains opened in Downtown Cleveland.
- » RTA extended services of the C Line Trolley to the Flats East Bank area, weekdays 7 to 11 p.m. and Weekends 11 a.m. to 11 p.m.
- » Successful advocacy efforts to protect the Ohio Historic Preservation Tax Credit in the 2017-2019 state budget and to renew the City of Cleveland tax abatement program, both of which are essential tools for sustaining housing development in Downtown and other city neighborhoods.



Playhouse Square Residential Tower Rendering



# Q1 2017 OFFICE MARKET UPDATE

## Downtown Cleveland is one of the largest job centers in Ohio

Jobs in Downtown Cleveland are consistently high paying and are easily accessible from around the city thanks to multiple RTA routes and highway systems. There are more than 95,000 jobs in a 2.2 square mile area, making Downtown Cleveland is one of the largest jobs centers in Ohio, but increasing the number of jobs in the central business district continues to be Downtown Cleveland Alliance's highest priority. Since the launch of DCA's Business Development Center, downtown employers have added over 3,000 jobs. Last year alone, downtown employers created or retained 7,900 jobs through the leasing of 1.2 million square feet of office space and the opening of 1,000 hotel rooms.

## Businesses continued to relocate and expand into Downtown Cleveland during Q2

Downtown Cleveland is working to add jobs and reduce the amount of vacant office space by aggressively attracting corporate headquarters and entrepreneurial companies to the neighborhood. NRP Group, a national developer of apartment complexes and other multifamily properties, announced it will relocate its corporate headquarters and consolidate other suburban locations into a single downtown office, bringing more than 100 jobs to the Halle Building. The 43,000-square-foot lease ties up the last notable commercial vacancy at the Halle building. Robots and Pencils announced the relocation of their corporate headquarters from suburban Beachwood to Downtown Cleveland to meet one of their main philosophies which is to "follow the talent."

In Q2 2017, Flashstarts, Inc., a startup accelerator, announced the Cleveland200 Fund – a \$5 million micro-venture fund focused on high-growth startups combined with a national marketing effort to attract companies to region. Attracting and growing startups is a proven way to increase area jobs.

## Q2 2017 Office Attractions and Retentions

- » Forest City Enterprises - 147,795 SF
  - » Benesch - 120,548 SF
  - » McDonald Hopkins - 78,951 SF
  - » PriceWaterhouseCoopers - 63,212 SF
  - » Taft - 52,000 SF
  - » Hyatt Legal Plans - 47,529 SF
  - » Millennia - 45,072 SF\*
  - » NRP Group - 41,307 SF\*
  - » Cleveland State University - 39,523 SF
  - » Bonezzi, Switzer Polito & Hupp - 17,702 SF
  - » Marshall Dennehey - 14,791SF
  - » Robots and Pencils - 7,500 SF\*
  - » Schwarzwald McNair Fusco - 4,923 SF\*
- \*Attraction

**13**  
OFFICE TENANTS  
SIGNED LEASES

**98,802 SF**  
OCCUPIED BY 4  
TENANTS NEW TO  
DOWNTOWN

**9**  
TENANTS  
RENEWED THEIR  
COMMITMENT TO  
DOWNTOWN

# Q2 2017 OFFICE MARKET UPDATE

## Downtown Cleveland office market attracting employment back to central business district

Led by employers prioritizing talent recruitment and retention when making real estate decisions, Downtown Cleveland is reversing a decades long trend of jobs sprawling into suburbs and exurbs.

Overall office vacancy in the central business district is up slightly since Q2 2016. Although Downtown led the suburban office market in average asking lease rates and net absorption, Downtown trailed the suburban market in office vacancy, illustrating the opportunities for talent attraction-conscious businesses to relocate or expand and the work that remains in building up the downtown employment base.

MARKET	AVG ASKING LEASE RATE (Class A and B)	NET ABSORPTION (Class A and B)	VACANCY (Class A and B)
Downtown Cleveland	\$19.79	40 SF	20.5%
Cleveland Suburbs	\$16.71	-23,756 SF	16.3%

Source: CBRE Marketview

## Downtown Class A Office occupancy climbing toward 90 percent

Increasing demand for Class A office space in Downtown Cleveland is fueled by businesses looking to attract top talent. The Millennial Generation and Generation Z both continue to indicate a preference to work in vibrant, walkable and transit connected office settings.

Class A occupancy rates continue to rise, with occupancy rates projected to exceed 90 percent in the near future.

Despite these increasing occupancy rates, opportunities remain for talent-focused businesses to relocate or expand into Downtown. In fact, Downtown Cleveland has more high quality Class A space available, including several large blocks of contiguous space, than the suburban market.

**14.7%**

CLASS A OFFICE  
VACANCY  
Q2 2017

JLL

**15.3%**  
Q2 2016

**\$24.08**

CLASS A  
AVERAGE ASKING  
LEASE RATE  
Q2 2017

JLL

**\$24.18**  
Q2 2016

**-12,657 SF**

CLASS A OFFICE  
NET ABSORPTION  
Q2 2017

JLL

000205

**104,911 SF**  
Q2 2016

# Q2 2017 HOUSING MARKET UPDATE

## **New Housing Units Continue to Propel Downtown Residential Growth**

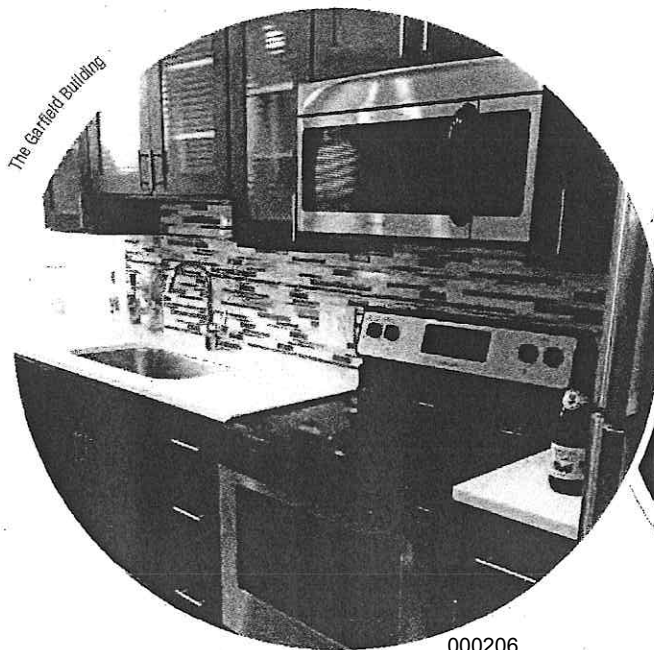
Downtown Cleveland's housing market remained the hottest in the region in Q2 as the first of the coming 1,000 new apartments hit the market, and the occupancy rate remained above 95 percent. By the end of the Q2, the Residences at Leader were 100 percent leased and the first tenants were preparing to move into The Garfield by the end of July. The Edge on Euclid also announced that their studio and one-bedroom units were completely leased by mid-July.

The next growth area for the downtown market is for sale housing. In Q2, The American Book Bindery began to convert apartments into condominiums with plans to continue conversions as units sell.

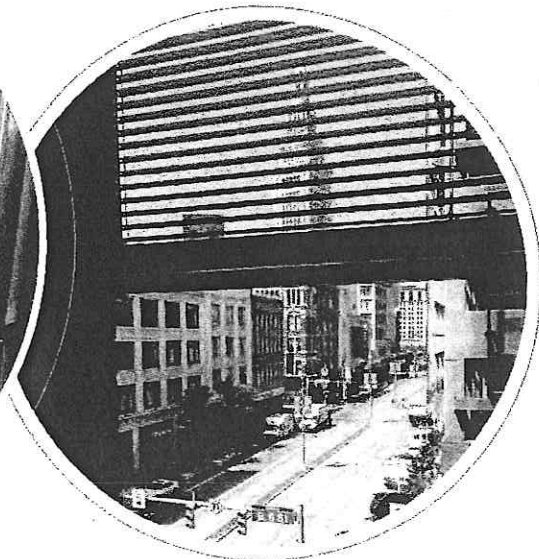
Another growth area is the development of surface parking lots. Playhouse Square announced their plans construct a 34-story apartment building on a theater district parking lot adjacent to the Hanna Building. The mixed-use space will feature 319 apartments, 550 parking spaces and 22,000 square feet for resident amenities. This project will continue to amplify the 24/7 live-work-play atmosphere of the Playhouse Square District.

Stark Enterprises is anticipated to begin construction during Q3 on The Beacon, adding a 19-story apartment tower atop the 515 Euclid Avenue parking garage.

The Ohio Historic Preservation Tax Credit program continues to fuel additional housing development to meet continuing demand for downtown living options. At the end of Q2, the State of Ohio awarded tax credits to two downtown projects. The Liberty Textiles Building at 1277 W. Sixth St. in the Warehouse District was awarded \$1.9 million in tax credits. Plans for the project include 80 new market rate apartments on the upper floors and commercial spaces on the ground floor. Trinity Cathedral Church Home at 2227 Prospect Ave. received a \$250,000 tax credit and will be renovated onto 23 apartments. Just outside of downtown, the facility at 3101 Euclid Avenue received a \$1.4 million tax credit. The project will include a restaurant and retail space on the first floor, and 80 market rate apartment units on floors two through nine.



The Garfield Building

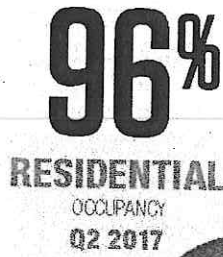




## DOWNTOWN APARTMENT RENTALS



Downtown Cleveland Alliance



Downtown Cleveland Alliance



Downtown Cleveland Alliance

## DOWNTOWN CONDO PURCHASING



Downtown Cleveland Alliance



Downtown Cleveland Alliance



Downtown Cleveland Alliance

## APARTMENT GROWTH IN DOWNTOWN AND SURROUNDING NEIGHBORHOODS

Apartments under construction in the surrounding neighborhoods include apartments in Ohio City, Detroit Shoreway, Tremont, Central, Midtown and Superior St. Clair Neighborhoods.



Downtown Cleveland Alliance



Downtown Cleveland Alliance  
000207

# Q2 2017 RETAIL MARKET UPDATE

## National Retailers open in Downtown Cleveland

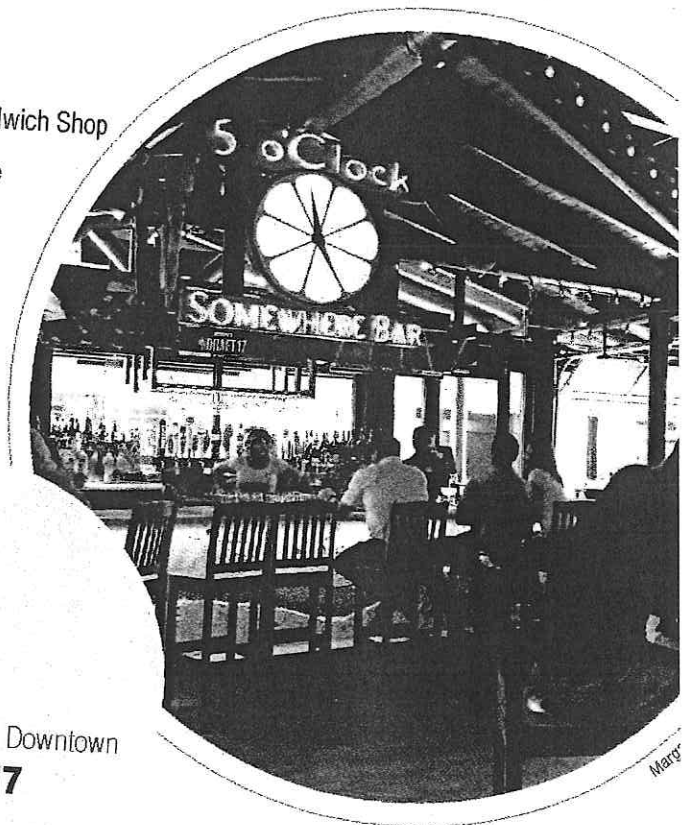
While the national retail industry is in a state of uncertain transition, Downtown Cleveland continues to steadily grow its retail base and adapt to larger trends. Downtown added three national retail chains in 2017. Taco Bell Cantina opened their sixth national location in the historic May Company Building outside of Public Square. Wahlburgers Cleveland opened in May, one of the just over 12 locations in the nation. Jimmy Buffet's Margaritaville announced its grand opening in Flats East Bank in Q2. The restaurant seats close to 500 diners and employs more than 200 people.

In a Downtown the size of Cleveland's, some turnover in the restaurant industry is anticipated. With Americans spending more on dining out than ever before, however, the strength of Downtown Cleveland's food scene is a retail strength. Retail trends also indicate that Americans are seeking "experiences" when they shop at brick and mortar stores. Downtown itself offers shoppers a unique experience. Specific locations like the 5th Street Arcades, Heinen's, Playhouse Square and the Warehouse District are especially well positioned for the current market due to the unique experiences they offer.

With more than 1,000 apartments hitting the Downtown market in 2017 and another 1,000 planned or underway in the surrounding neighborhoods, the Greater Downtown Trade Area continues to grow and become more attractive to retailers.

### Q2 2017 Retail Attractions

- » Orange Theory
- » Thirsty Dog
- » Dante's Inferno
- » Butcher and the Brewer Sandwich Shop
- » Jimmy Buffett's Margaritaville
- » Taco Bell Cantina
- » Wahlburgers Cleveland
- » Zaytoon



# 8

New retail locations in Downtown  
in Q2 2017

# Q2 2017 HOSPITALITY MARKET UPDATE

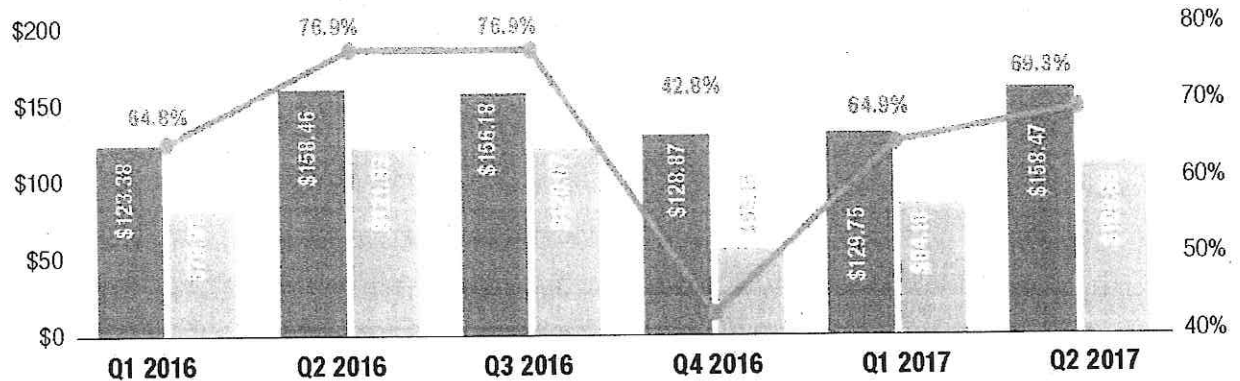
## Concerts and sporting events draw visitors into Downtown

In Q2 2017, Downtown Cleveland welcomed visitors to baseball games, concerts and summer celebrations. So far this season, attendance for Cleveland Indians games at Progressive Field have surpassed 2016 numbers by more than 4,000 attendees per game. Each home game brings an average paid attendance of 23,230, putting the Indians on pace to approach 2 million attendees in 2017.

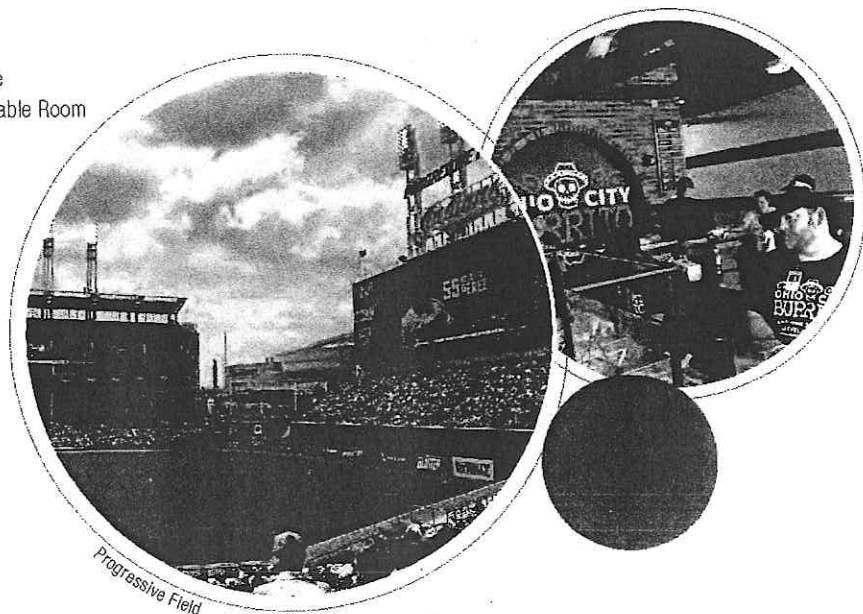
In June, Paul Simon performed to a sold-out crowd at Jacob's Pavilion at Nautica. In July, Downtown Cleveland was home to multiple concerts welcoming more than 140,000 fans. U2 performed at FirstEnergy Stadium on July 1, and a celebration block party was held in the Warehouse District prior to the event. July also welcomed Billy Joel and country singer Luke Bryan to Progressive field on consecutive nights. These two shows alone brought 70,000 fans into Downtown Cleveland.

## Hotels continue to bring value to Downtown Cleveland

In 2016, 1,000 new hotel rooms opened in Downtown in time to welcome visitors to the Republican National Convention in Q2 2016. These additions to the Downtown hospitality market continue to serve the market, with occupancy remaining strong, especially with the large addition of product. Average daily rate held steady and revenue per available room decreased compared to Q2 2016. 2016 saw the typical dip in Q4 when the convention business in Cleveland is slow.



Occupancy  
 Average Daily Rate  
 Revenue per Available Room



## Q2 2017 TRANSPORTATION UPDATE

### **Transportation updates continue to improve downtown connectivity**

One of Downtown Cleveland's greatest assets is its interconnectivity and its easy routes to the surrounding neighborhoods and the suburbs of Cleveland. Greater Cleveland already has one of the highest concentrations of young, highly skilled workforces in the U.S. The transportation options Downtown Cleveland offers provide employers a leg up in attracting this talent base.

### **Downtown Cleveland has Ohio's Most Diverse Range of Transportation Options**

- » Downtown is the hub of the region's interstate system. I-90, I-71, I-77, I-480, and the Ohio Turnpike give residents to the East, West, and South easy access to Downtown.
- » Commuters who drive Downtown have access to 57,000 parking spaces and some of the most affordable parking of any major central business district in the Great Lakes Region.
- » The internationally recognized bus-rapid transit, the HealthLine, connects the largest employment hub in the State of Ohio with the Cleveland Clinic and the City of Cleveland's second largest employment hub, University Circle.
- » The Cleveland State Line, a BRT service modeled on the HealthLine, connects Western neighborhoods and suburbs to Downtown.
- » The State of Ohio's only commuter rail system provides residents of neighborhoods and suburbs and customers of Cleveland Hopkins Airport direct access to Downtown.
- » Downtown has the most extensive free downtown trolley network in the U.S., with trolleys running every 10-15 minutes and serving workers, residents, and visitors.

### **DCA provides transportation consulting and assistance**

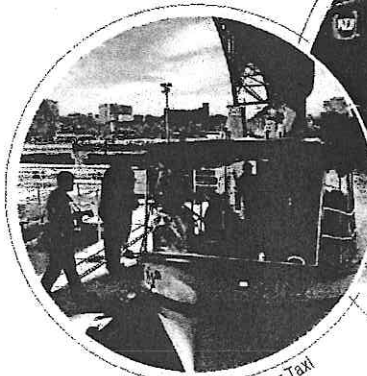
DCA's Business Development Center offers free transportation consultation and assistance to employers that relocate or expand in the central business district. In addition to saving money, raising awareness about the availability of transportation options helps advance talent recruitment and retention. Some of the resources and tools that DCA can offer include identifying parking locations via DCA's online and mobile-friendly Parking Navigator; competitively bidding parking solutions through a partnership with the Cleveland Parking Association; providing information about programs that allow commuters to purchase parking or RTA passes with pre-tax dollars; providing access to the RTA Ready-to-Ride program, which includes customized route planning for employees, an assigned trip advisor, and complimentary RTA passes; connecting commuters with information about bicycling; and ensuring advocacy for improved transportation funding, services and infrastructure.

## **Downtown Cleveland enhanced transportation assets in Q2 with service, infrastructure and technology improvements**

Downtown Cleveland's transportation system took steps forward to improve service across multiple modes, including bus-rapid transit, trolley, light rail, bike share, and water taxi. Service and technology improvements in Q2 2017 make it easier than ever to commute into Downtown Cleveland.

### **Q2 Improvements included:**

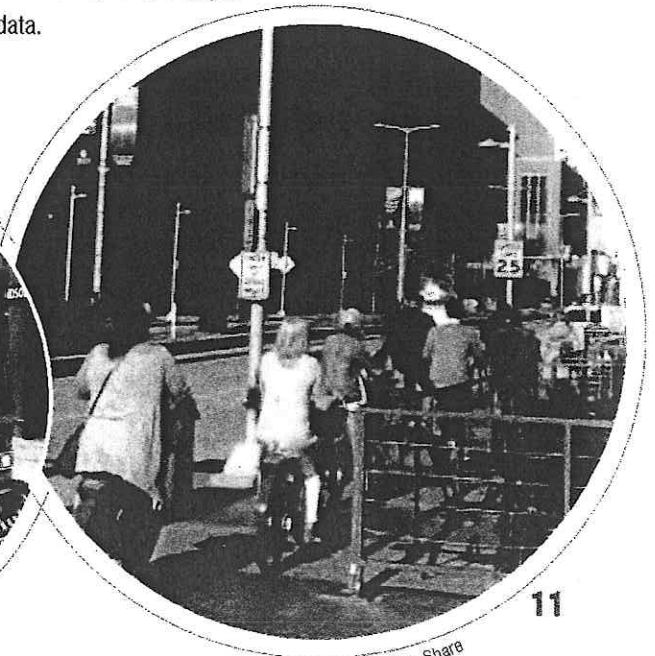
- » Extended RTA's Free C-Line trolley to serve the Flats East Bank riverfront development extension. The C-Line runs 7-11pm Monday -Friday and 11am-11pm Saturday-Sunday.
- » RTA broke ground on a new Rapid Station that will serve the E. 34 St., Cuyahoga Community College, and the Campus District.
- » RTA announced plans for a new bus-rapid transit service, the MetroHealth Line, better connecting its W. 25th Street main campus with Downtown Cleveland and surrounding neighborhoods.
- » UH Bikes, Cleveland's bike share system, added three new stations, including one at Cleveland State University, improving connectivity between Downtown and surrounding neighborhoods.
- » Metroparks announced that, thanks to a sponsorship from ArcelorMittal, the Water Taxi connecting the Flats East Bank, West Bank, and points along the Cuyahoga River will be free for the remainder of the season.
- » The Lake Link section of the Cleveland Foundation Centennial Trail opened, improving bicycle and pedestrian access to the Cuyahoga River Valley and Towpath Trail.
- » The free, interactive Gohio Commute program allows commuters to plan their trip, identify available transportation modes and routes, connect with nearby commuters, and log commute information.
- » RTA now makes real-time information about bus, BRT, trolley and train arrivals and departures available to app developers. A number of Android and IOS applications—including Google Maps, Transit, Roadify, Moovit, and Transit!—utilize RTA's real-time data.
- » RTA tickets can easily be purchased via the official RTA app.



Metroparks Water Taxi



Trolley



UH Bike Share

## Q2 2017 DCA UPDATE

### **DCA's Business Development Center**

DCA's Business Development Center serves as a single point of contact for business leaders and decision makers, commercial real estate professionals, developers and investors. The Center's services include advocacy, marketing, research, site selection assistance, public and private financial assistance consulting and technical support.

### **During Q2 2017, DCA's Business Development Center team:**

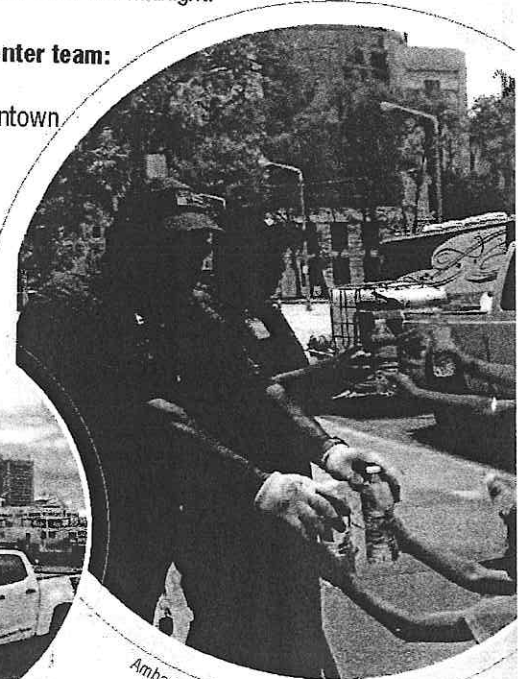
- » Conducted 86 business attraction, retention, engagement meetings during Q2 and 234 in the first half of 2017.
- » Tracked 11 business attraction leads that would bring over 450 jobs to Downtown Cleveland
- » Provided market research and technical assistance to 8 projects that could bring an estimated \$170 million of investment into Downtown Cleveland
- » Advocated for The Q Transformation plan by submitting a Friend of the Court Brief to the Ohio Supreme Court.
- » Advocated for fix to state budget tax issue to prevent a multi-million dollar per year budget loss to the Greater Cleveland Regional Transit Authority.

### **DCA's Clean & Safe Ambassadors complete Spring Cleaning**

DCA's Ambassador program employs more than 60 people who are dedicated to keeping Downtown Cleveland's streets clean and safe and welcoming for visitors all year round. The Ambassadors can be seen patrolling Downtown's neighborhoods from W. 10th Street to E. 18th on foot and on bicycles. They act as mobile concierges and as maintenance staff. Reach an ambassador by calling 216-621-6000 anytime between 7 a.m. and midnight.

### **During Q2 2017, DCA's Business Development Center team:**

- » Collected 148,725 pounds of trash from Downtown streets
- » Provided 383 safety escorts
- » Served as concierges to 5,675 visitors



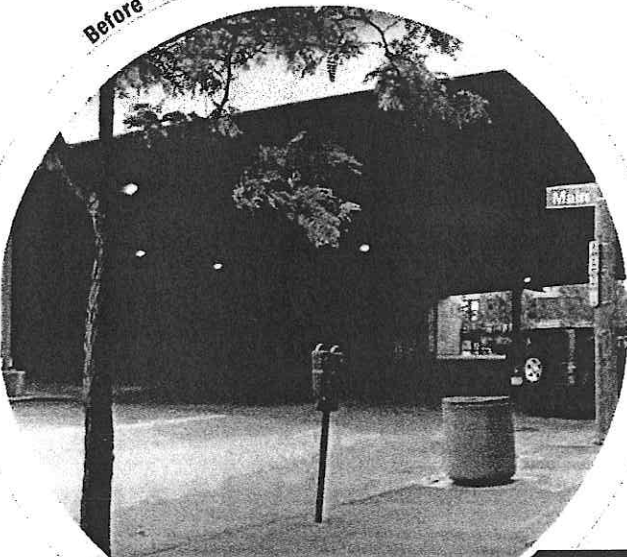
Ambassadors in Downtown Cleveland

# Q2 2017 STEP UP DOWNTOWN

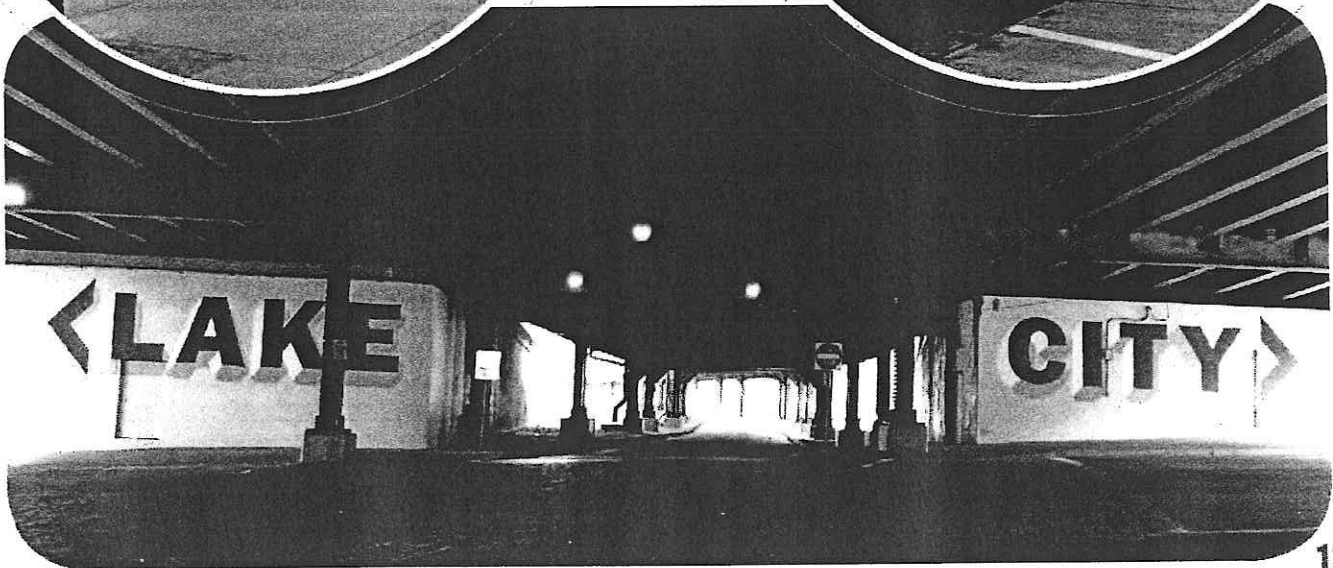
## Key Connection Main Avenue Bridge sees improvements

During Q2 2017, Downtown Cleveland Alliance continued to work with neighborhood partners to increase downtown connectivity through Step Up Downtown. The vision and tactical plan identifies connectivity as the overarching theme necessary to take Downtown Cleveland to the next level, and identified 18 key connections to improve Downtown's walkability. One of those key connections that needed to be improved to increase overall neighborhood connectivity was the Main Avenue Bridge underpass which is a main pedestrian connection between the Warehouse District and Flats neighborhood. In Q2 2017, the Historic Warehouse District Development Corporation received volunteers from KeyBank's Make a Difference Day and financial support from Sherwin Williams. Artist Alan Giberson updated the space with public art and Cleveland Public Power improved the lighting. The improvements make the pathway less intimidating to walkers coming from either direction and the public art adds value to the location.

Before - Main Avenue Bridge



Rendering

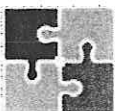


After - Main Avenue Bridge Mural Installation



## ABOUT DOWNTOWN CLEVELAND ALLIANCE

Downtown Cleveland Alliance (DCA) is a not-for-profit organization dedicated to building a dynamic downtown. By working with property owners and neighborhood based partners, DCA is able to provide economic development opportunities, business attraction and retention efforts, the Clean and Safe Ambassador Program as well as strategic marketing initiatives for Downtown Cleveland. In 2014, DCA unveiled Step Up Downtown, a vision and tactical plan that sets the course for the future of Downtown Cleveland. The five-year strategy is available to read at [DowntownCleveland.com](http://DowntownCleveland.com)



000214

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**DOWNTOWN CLEVELAND  
15,000 RESIDENTS  
AND COUNTING**

Cleveland  
Development  
Advisors

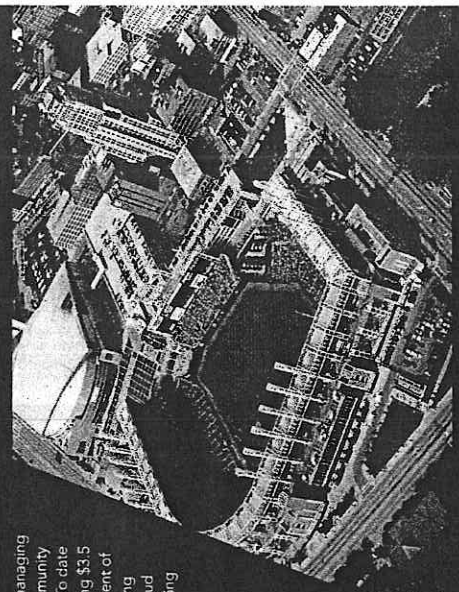
AN AFFILIATE OF GREATER CLEVELAND PARTNERSHIP

**Cleveland Development Advisors (CDA), formed in 1989, is the real estate and business financing affiliate of the Greater Cleveland Partnership. CDA invests privately funded capital into catalytic projects designed to advance economic and community development projects throughout Cleveland.**

1989



Beginning in 1992, CDA focused significant resources into the adaptive reuse of historic buildings in downtown Cleveland's Warehouse District, including nine (9) of the largest residential projects, beginning with the Grand Arcade, and including major projects like the Edgemoor, National Terminal Apartments, Bridgeway Apartments and the Promenade. In all, CDA financing



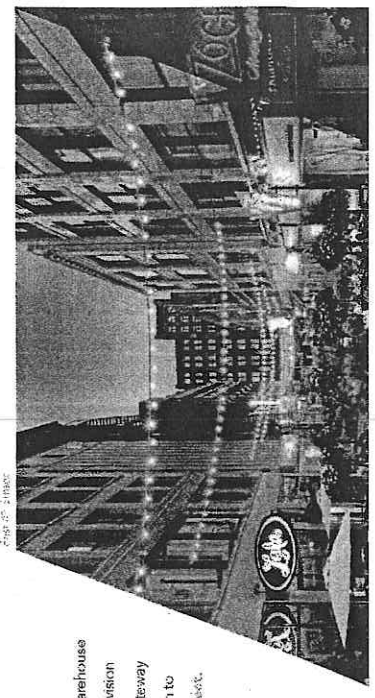
Gateway Sports Complex

1990

A has a 28-year track record of capitalizing, investing and managing the business community's investment in economic and community development projects in underserved areas of Cleveland. To date CDA has invested \$3.60 billion into 125 projects - generating \$3.5 billion in development. CDA has invested in the development of nearly 5,500 apartment units throughout Cleveland, including more than 3,800 units in Downtown Cleveland and is proud to have helped reach the milestone of 15,000 residents calling Downtown their Neighborhood.

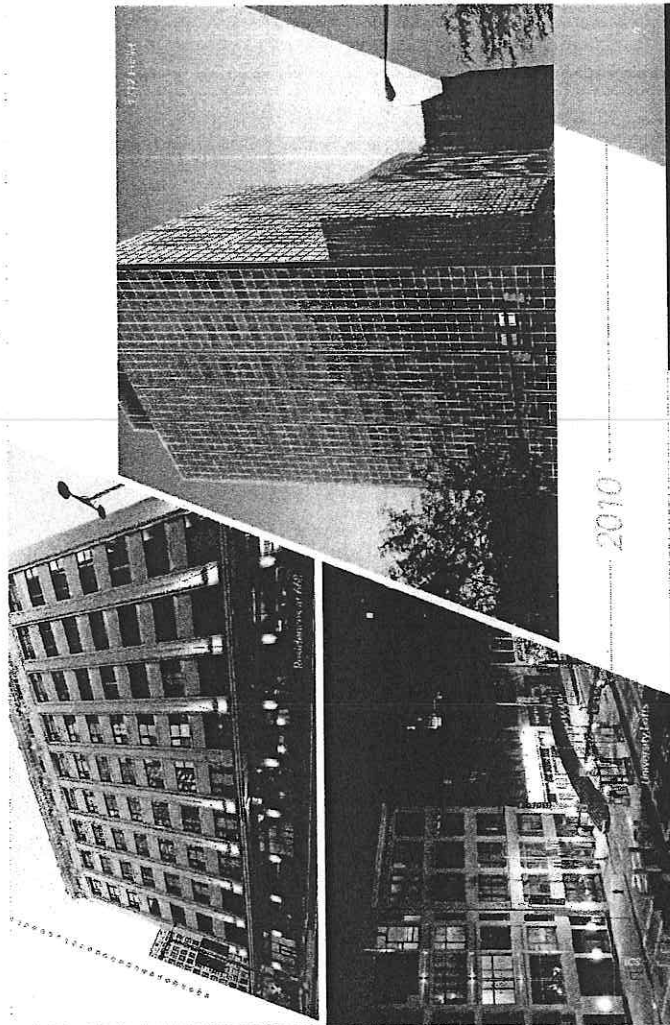
The following pages highlight some of the major CDA investments that have made Downtown the Neighborhood it is today

CDA's first investment was a **\$28 million** investment to guarantee the completion of the Gateway Sports Complex - the current home of the Cleveland Indians and Cleveland Cavaliers.



Warehouse District

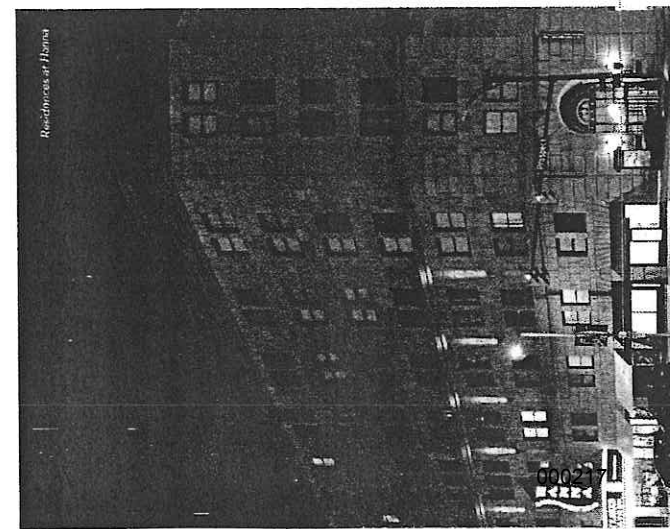
Galvanized by the success of the Warehouse District and seeing the developers' vision to capitalize on the neighboring Gateway Sports Complex energy, CDA began to invest in the creation of East 4th Street. This acquisition and construction financing provided by CDA led to the redevelopment of an entire city block into a destination neighborhood which is now home to the House of Blues.



In 2003, CDA became one of the first institutions to utilize the Federal New Markets Tax Credit program as an economic development tool, investing throughout Cleveland's neighborhoods. Numerous Downtown projects have benefited from these tax credits, including East 4th Street, the Amertus headquarters, Residences at 665, 1717 Eurtis and the Residences at Franks. These investments created over 5,000 jobs and 1,104 apartment units.

2000

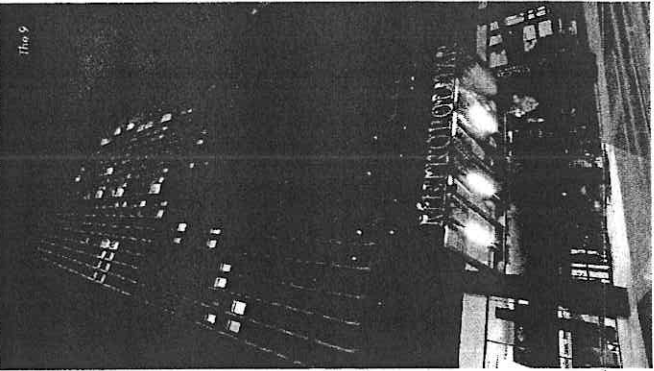
2010



Providing public access to its historic waterfront is a top priority for the City of Cleveland. In 2006, CDA provided early financing as part of the \$750 million Flats East Bank neighborhood project, and in 2014 this project began welcoming residents to this unique urban waterfront destination neighborhood.

**\$750M**  
Invested in redevelopment of the Flat East Bank

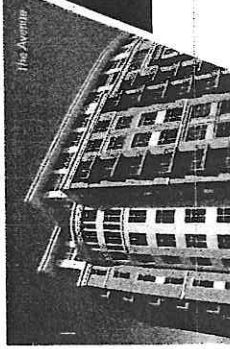
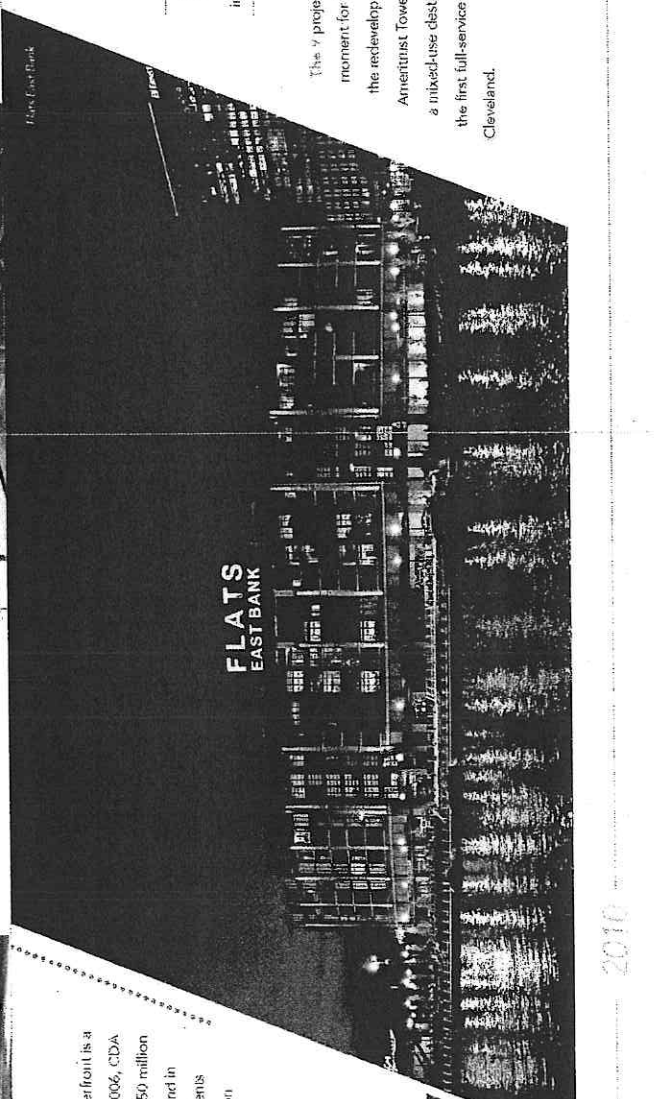
2010

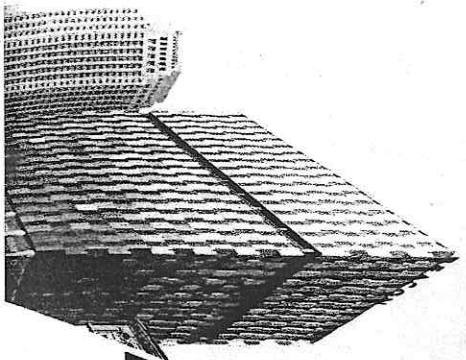


**\$250M**  
Invested in The 9 project

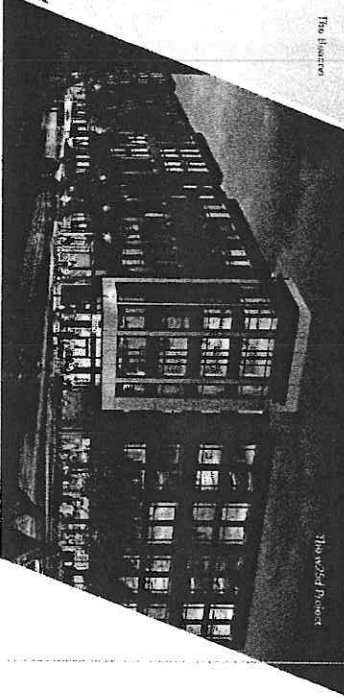
The 9 project was a major watershed moment for Downtown Cleveland with the redevelopment of the long-vacant Amertus Tower and Historic Rotunda into a mixed-use destination including Heinen's, the first full-service grocery store in Downtown Cleveland.

2015





The Piazza



The West Project

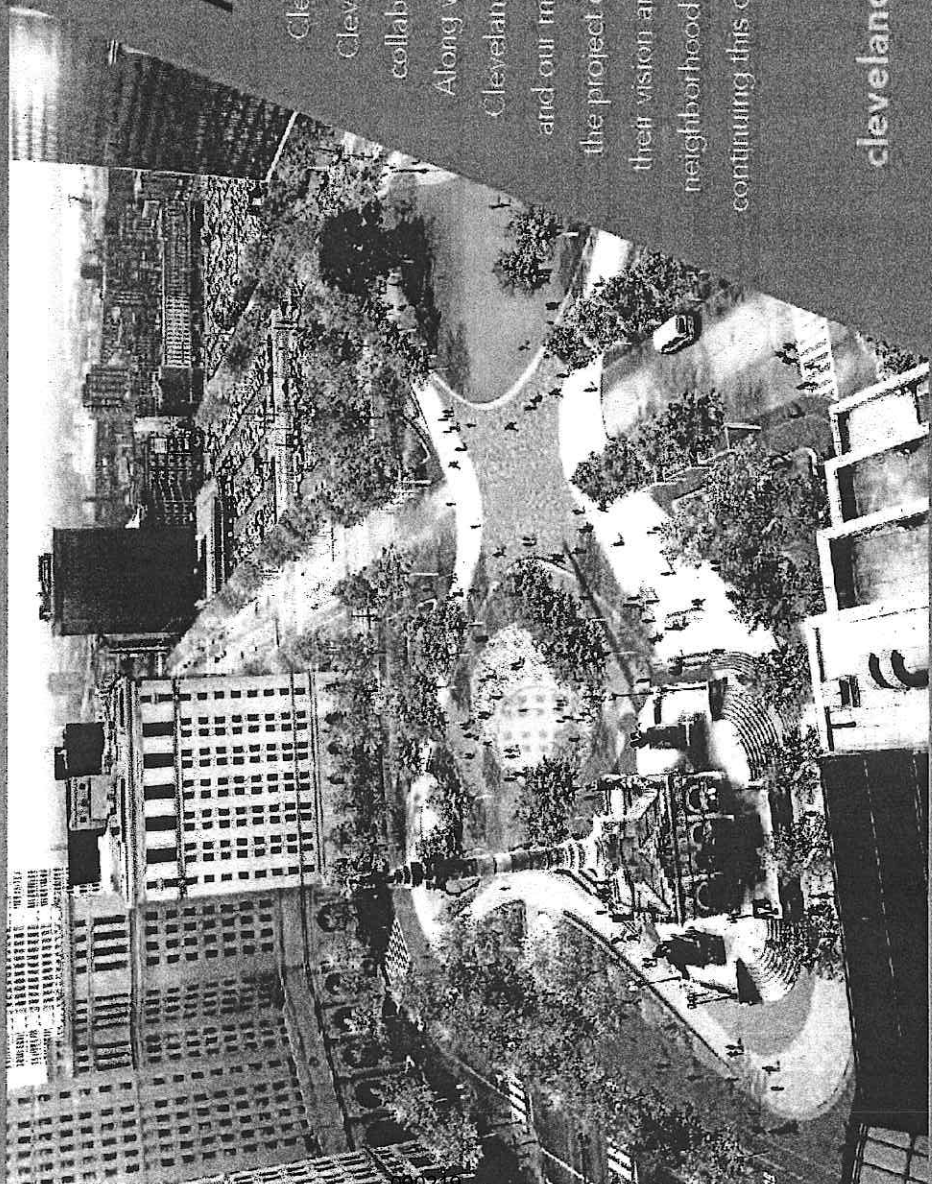
CDA recently closed on financing for the \$25.1 million, the  
The West Project, as well as the \$25.1 million, the first high  
rise residential building constructed in Downtown in decades. CDA

### Downtown Housing Investment

<b>32</b> projects	<b>\$81M</b> invested	<b>\$1B</b> in total development	<b>3,868</b> housing units created
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All Housing Investment

Standard Building



## Acknowledgments

Cleveland Development Advisors and the Greater Cleveland Partnership are proud of the ongoing collaborative efforts to revitalize Downtown Cleveland. Along with our valued investors, we thank the City of Cleveland, Cuyahoga County, Downtown Cleveland Alliance and our many civic partners. Last but not least, we thank the project developers and stakeholders who have shared their vision and implemented their plans to create a downtown neighborhood we can all be proud of. We look forward to continuing this collaboration as we double down on downtown.

[clevelanddevelopmentadvisors.com](http://clevelanddevelopmentadvisors.com)

Public Square

CDA is an equal opportunity provider.

**Cleveland Development Advisors**  
AN AFFILIATE OF GREATER CLEVELAND PARTNERSHIP



An affiliate of

# PUBLIC SQUARE

On June 30, 2016, after of eight years of planning and incredible teamwork by a number of civic and corporate leaders, Cleveland's new Public Square was unveiled.

The \$50 million renovation honored the historical vision of the 6.5 acre park and also created a modern-day public space that focuses on people. Designed by James Corner Field Operations (JCFO), a world-renowned landscape architect firm that has created dynamic and inviting public spaces in Chicago, New York, Toronto, Brazil, Norway and more, Public Square has been transformed into an active and engaging space for all to enjoy.

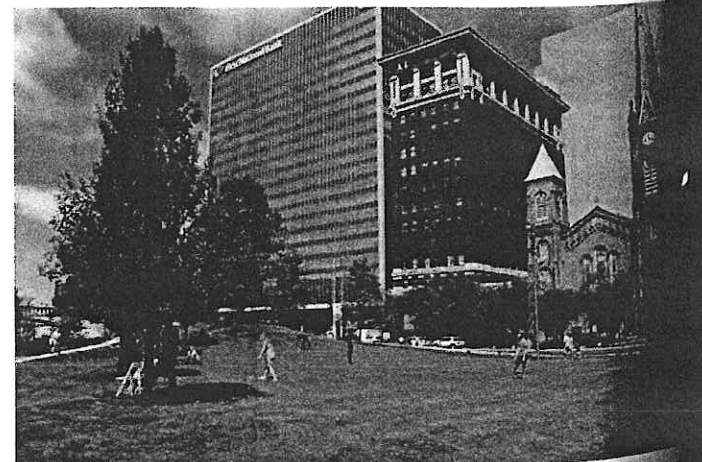
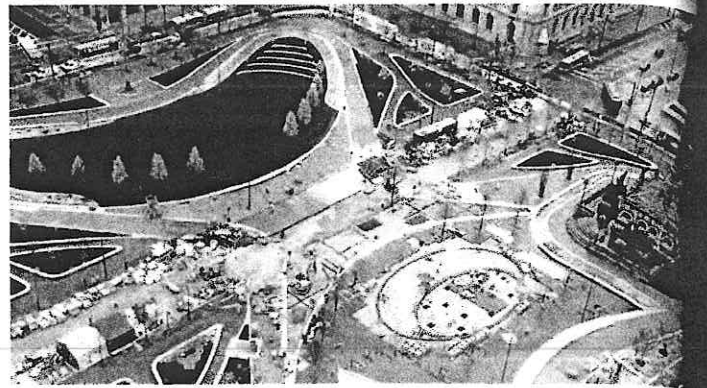
In the heart of Downtown Cleveland, right outside of Cleveland's iconic Terminal Tower, the new Public Square is part of an overall plan to connect catalytic developments like the Flats East Bank, and Cleveland Convention Center, and to better connect Public Square to the Malls, and the lakefront.

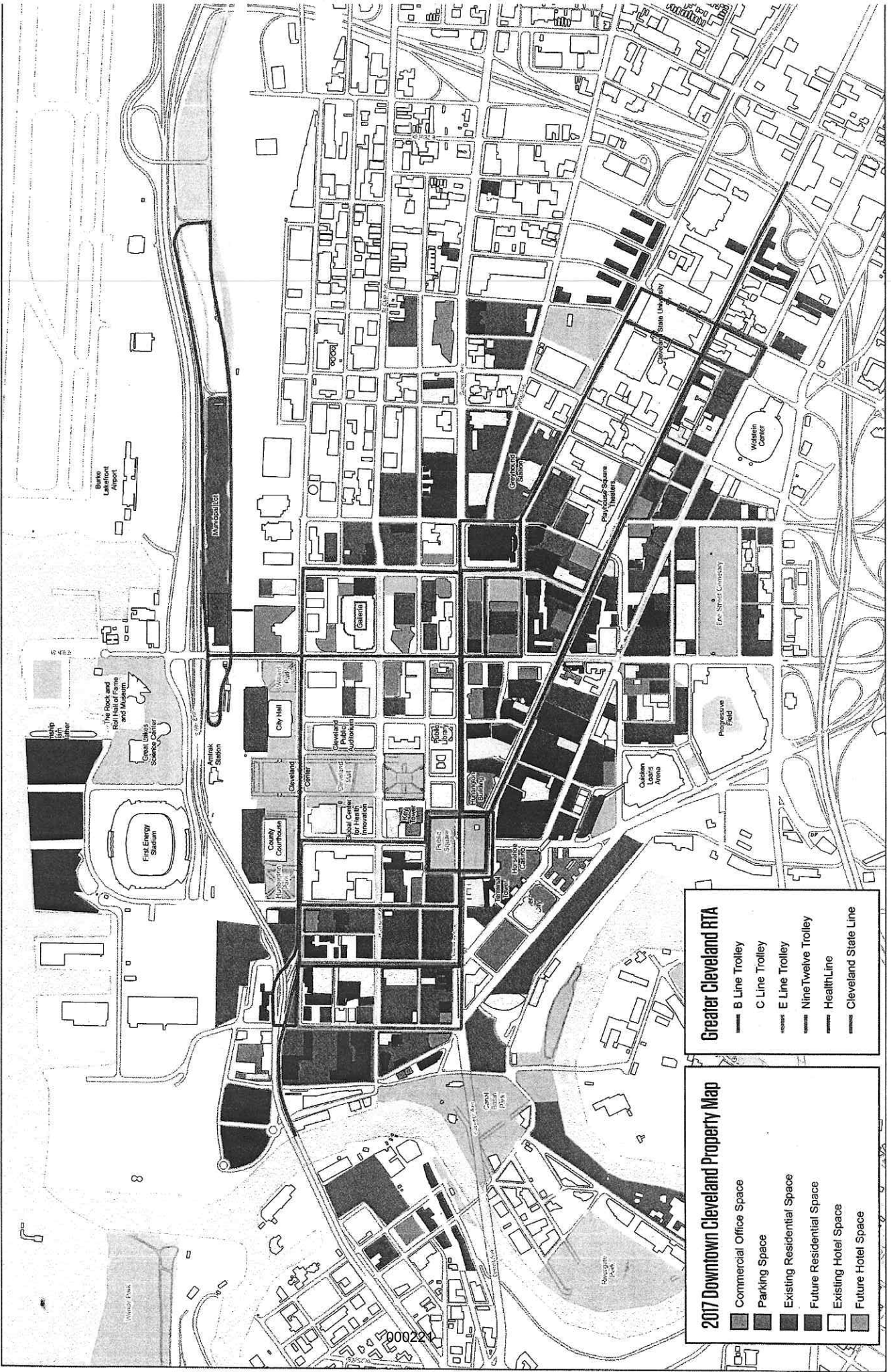
The Square includes walking promenades, a lush lawn with a natural amphitheater for concerts and events, areas to sit and lounge, a water feature with seasonal ice rink, a speakers terrace, a café, restrooms, and much more. The Soldiers and Sailors Monument was integrated into the overall park to become more accessible.

Since the re-dedication of Public Square, the space has re-energized downtown Cleveland. The site has been home to hundreds of events, offering something for everyone.

Children play in the water feature, while downtown workers eat lunch at Rebol or in the amazing new green space of The Gund Foundation Green.

Visitors have enjoyed live music, great food events like Food Trucks and Farmers' Markets. Public Square has also played host to numerous public demonstrations in the Cleveland Foundation Centennial Plaza.





**Greater Cleveland RTA**

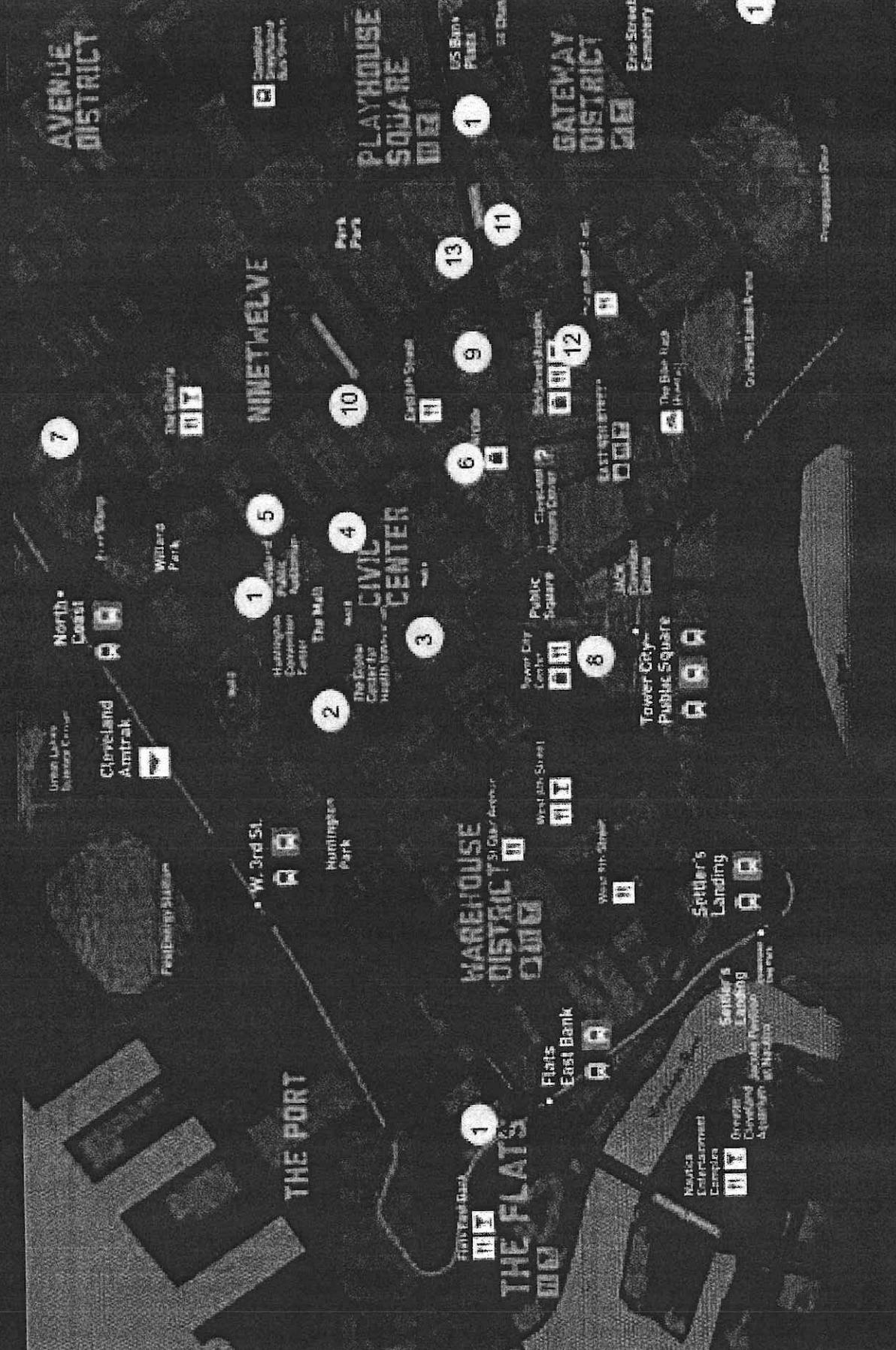
- B Line Trolley
- C Line Trolley
- E Line Trolley
- Nine/Twelve Trolley
- HealthLine
- Cleveland State Line

**2017 Downtown Cleveland Property Map**

- Commercial Office Space
- Parking Space
- Existing Residential Space
- Future Residential Space
- Existing Hotel Space
- Future Hotel Space

20022

# Downtown Cleveland Hotel Map







5 Years  
**14 Counties**  
**180+ Investments**

**\$21.8 BILLION+**  
**INVESTED IN NORTHEAST OHIO**

2013-2017 Northeast Ohio  
**Capital Investment Synopsis**

2125 Superior Residential Conversion	\$14
925 Euclid Ave. renovation	\$280
Akron Children's Hospital Considine Building expansion	\$84
Akron Children's Hospital Kay Jewelers Pavilion	\$180
Alcoa aerospace castings expansion	\$100
Amazon Fulfillment Center - North Randall	\$177
American Greetings Headquarters	\$150
ArcelorMittal facility upgrades	\$55
Arhaus Furniture headquarters	\$43
Aspen Place apartments	\$11
Baker Hughes facility	\$64
Beacon (515 Euclid)	\$94
Bowery Project - Akron	\$38
Breakwater Bluffs	\$45
ByteGrid downtown data center	\$100
Carroll County Energy natural gas power plant	\$899
Cedar Extension Redevelopment, Phase 1	\$33
Celebrezze Federal Building Renovation	\$121
Centric mixed use development (former Intesa)	\$70
Charter Steel Cuyahoga Heights rolling mill	\$153
Chesapeake Consortium processing facility	\$900
Church and State apartments	\$50
Church Square Commons	\$15
City Blue Building apartment conversion	\$14
City of Cleveland Third District Police Station	\$15
Cleveland Athletic Club apartment conversion	\$62
Cleveland Clinic Akron General Level 1 Trauma Center	\$50
Cleveland Clinic Cancer Center	\$276
Cleveland Clinic CWRU Health Education Campus	\$515
Cleveland Clinic Fairview Hospital Expansion	\$83
Cleveland Clinic Holiday Inn	\$40
Cleveland Clinic Jacobs Health Center, Phase 2	\$143
Cleveland Clinic Lakewood Health Center	\$34
Cleveland Clinic Lutheran Hospital Expansion	\$18
Cleveland Heights-University Heights High School renovation	\$79
Cleveland Hopkins International Airport Control Tower	\$77
Cleveland Hopkins International Airport Terminal Renovation	\$20
Cleveland Institute of Art Dorms	\$16
Cleveland Institute of Art Expansion	\$75
Cleveland Museum of Art Expansion	\$350
Cleveland Museum of Natural History Expansion	\$150
Cleveland Rowing Foundation Rivergate Park	\$10
Cleveland School for the Arts	\$25
CMHA Cedar Redevelopment	\$14
CMSD Campus International School	\$24
Corning Place apartments (Garfield Building)	\$40
Creswell apartments	\$18
Cristal Global expansion	\$64
CSU Center for Innovations in Health Professions	\$45
CSU Washkewicz College of Engineering Building	\$60
Cuyahoga County Administration Building	\$80
Cuyahoga County Public Library	\$100
CWRU Dental School	\$60
CWRU Performing Arts Center	\$26
CWRU think[box] Institute for Collaboration and Innovation	\$35
CWRU Tinkham Veale University Center	\$50
Daisy Brand plant	\$142
Dealer Tire Headquarters	\$25
Downtown Lakefront Plan - Phase 1	\$10
Downtown Lakefront Plan - Harbor Verandas	\$12
Drury Plaza Hotel	\$52
Eaton Corporation Headquarters	\$170
Fairmont Creamery apartments	\$15
Fat Heads Brewing facility	\$9
FirstEnergy Stadium Renovation	\$120
FirstEnergy transmission control center	\$45
Flats East Bank, Phase 1	\$275
Flats East Bank, Phase 2	\$146
Ford Avon Lake Assembly Plant, F-650/F-750 production	\$168
Ford Avon Lake Assembly Plant, Super Duty production	\$200
Ford Brook Park Engine Plant Upgrades	\$145
Goodyear Tire & Rubber Co. headquarters	\$161
Great Lakes Science Center	\$40
H.J. Heinz Co. expansion	\$28
Halcon Resources Corp.	\$70
Hazel 8 Apartments	\$11
Hemmingway Midtown office & lab park	\$51
Hess Corp and PVR Partners LP pipeline	\$125
Hilton Cleveland Downtown	\$272



**CWRU Health Education Campus**



**Snavelly W. 25th Development**



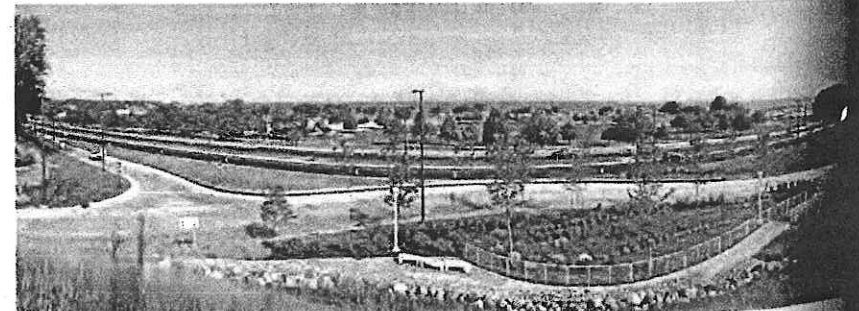
**UH Rainbow Center for Women and Children**



**Dealer Tire Headquarters**



**Playhouse Square Apartment Tower**



**West Shoreway Boulevard Conversion**

Hollywood Gaming at Mahoning Valley	
Huntington Convention Center/Global Center for Health Innovation	
Hyland Software Expansion	
IBM/Explorys Headquarters	
Innova Phase 1	
Innova Phase 2	
IX Center Renovation & Expansion	
J.M. Smucker Co. plant	
KSU Center for the Visual Arts	
KSU College of Architecture & Environmental Design	
KSU Cunningham, Smith and Williams Halls upgrades	
KSU Integrated Sciences Building	
Lake Health System	
Lakefront Pedestrian Bridge	
Leader Building Apartment Conversion	
LEEDCo. Lake Erie Wind Farm Pilot	
Legacy Village Hyatt Place Hotel and Parking Structure	
Liberty Textile Building apartments	
Link 59	
Louis Stokes VA Medical Center Expansion	
Lubrizon plant expansion	
Marathon Petroleum refineries and pipeline	
Menlo Park Academy	
MetroHealth Brecksville Health and Surgery Center	
MetroHealth Critical Care Facility expansion	
MetroHealth Main Campus Transformation	
MetroHealth Middleburg Heights Health Center	
MT Silver Building Residential Conversion	
Mueller Electric Building Residential Conversion	
NEOMED Portage County	
Nestle L.J. Minor Plant Expansion	
Nestle Product Technology Center - Solon	
Newell Rubbermaid expansion	
Nord Family Greenway & Doan Brook Restoration	
Northfield Park Racino	
OhioHealth MedCentral Mansfield Hospital	
One Twenty West apartments	
One University Circle	
Opportunity Corridor	
Park/Southworth Buildings Apartment Conversion	
Pennant Midstream LLC plant	
Pepperidge Farms expansion	
Pinecrest mixed use development	
Playhouse Square Apartment Tower	
Playhouse Square District Enhancements	
Pro Football Hall of Fame expansion	
Pro Football Hall of Fame Village	
Progressive Field renovations	
Public Infrastructure and Development Financing - 2013	
Public Infrastructure and Development Financing - 2014	
Public Infrastructure and Development Financing - 2015	
Public Infrastructure and Development Financing - 2016	
Public Square Renovation	
Quattro condo development	
Quicken Loans Arena Transformation Plan	
Residences at 1717	
Residences at the Hanna	
Rockport Square townhome development	
Rosetta Building Renovation	
Schofield Hotel & Residential Renovation	
Senator George V. Voinovich Bridge, Eastbound	
Senator George V. Voinovich Bridge, Westbound	
SFS Intec expansion	

Snively W, 25th Street mixed use development .....	\$60
St. Luke's Manor .....	\$53
St. Martin de Pores High School .....	\$27
Standard Building Apartment Conversion .....	\$81
Steelyard Commons, Phase 2 .....	\$40
Summa Health facility plan .....	\$350
Texas Eastern Transmission LP pipeline .....	\$468
The 9/Metropolitan Hotel/Heinen's Fine Foods .....	\$170
The Archer apartments renovation .....	\$38
The Edge apartments .....	\$50
The Ivory apartment renovation .....	\$12
The Langston at Cleveland State University .....	\$45
The Midtown apartments .....	\$10
Thistledown Racino expansion .....	\$70
Thistledown Racino renovation .....	\$88
Timken expansion .....	\$310
Tri-C Metro Campus Center renovation .....	\$38
Tri-C Metro Campus Plaza improvements .....	\$28
Tru by Hilton hotel .....	\$12
University Edge (Akron) .....	\$40
University Hospitals Broadview Heights Health Center .....	\$28
University Hospitals Courtyard by Marriott .....	\$27
University Hospitals Alexander Neonatal Intensive Care Unit .....	\$25
University Hospitals Rainbow Center for Women and Children .....	\$24
Uptown, Phase 1 .....	\$45
Uptown, Phase 2 .....	\$21
Ursuline Sisters of Cleveland Merici Crossings .....	\$20
Vadxx Energy .....	\$20
ValleyCare Health System .....	\$50
VAM USA of Houston steel mill .....	\$81
Van Aken District, Phase 1 .....	\$97
Victory Building .....	\$27
Vitamix Expansion .....	\$10
West Shoreway Boulevard Conversion .....	\$85
Western Reserve Academy Seymour Hall renovation .....	\$14
Westin Hotel Conversion .....	\$73
Worthington Yards .....	\$31

**Flats East Bank**



**Opportunity Corridor, Section 1**



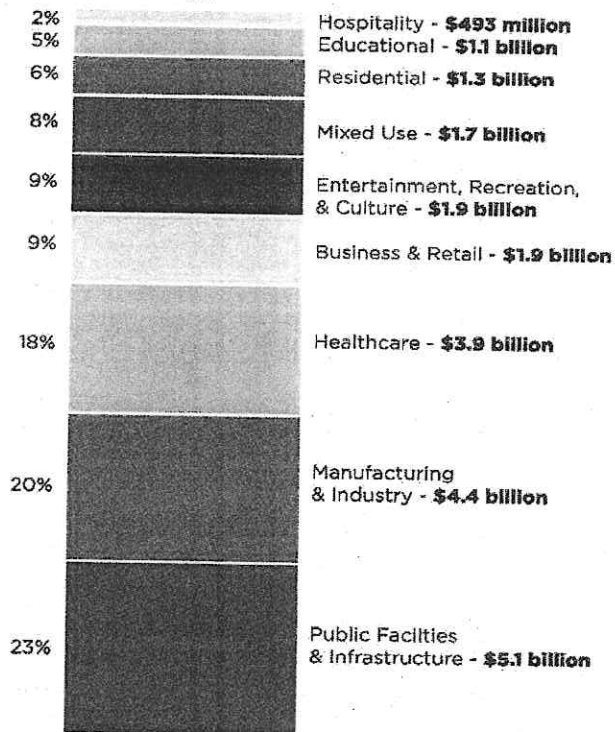
**Huntington Convention Center of Cleveland, Global Center for Health Innovation, and Hilton Cleveland Downtown Hotel**

## About This Document

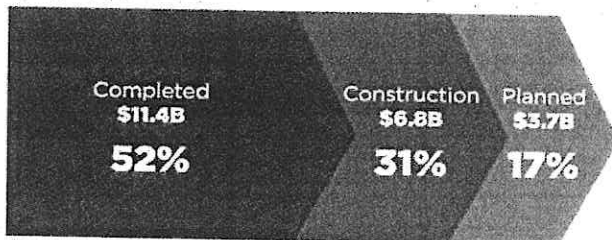
The 2013-2017 Northeast Ohio Capital Investment Synopsis provides a snapshot of the major catalytic development taking place throughout Greater Cleveland. The listed projects or initiatives each involved an investment of at least \$10 million in capital costs and were completed, had begun construction, or had secured necessary funding during the past five years. The list also includes cumulative figures from capital investment contracts executed by several key public agencies during the same time frame. While it is nearly impossible to capture all of the development activity taking place in the 14-county region, this document highlights some of the most significant investments completed and taking place in Greater Cleveland thanks to the efforts of numerous public, private, non-profit, and philanthropic partners.

## Investment Breakdown

### Investment Type



### Project Status



Capital Investment Synopsis compiled by:

## GCP Real Estate, Business & Physical Development

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