

Ohio

**Department of
Job and Family Services**

John R. Kasich, Governor
Cynthia C. Dungey, Director

2016 ANNUAL OHIO SHALE REPORT

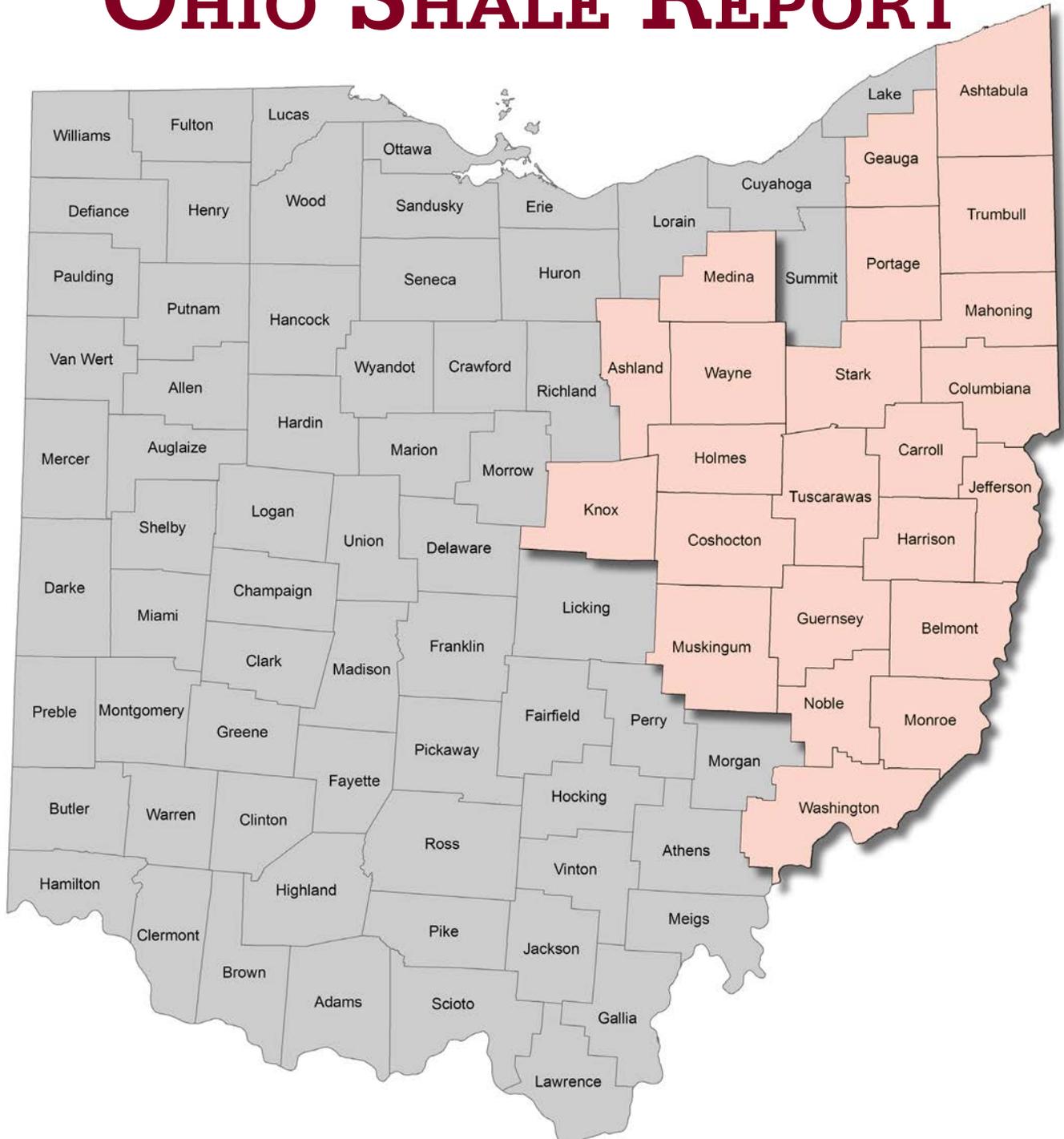


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A Message from Director Dungey

As a result of lower oil and gas prices worldwide, the number of oil and gas drilling rigs nationally and in Ohio has been declining since 2014. However, better news may be on the horizon. The national count of oil and gas rigs bottomed out in early 2017 and has begun to increase.

In Ohio, employment increased 24.2 percent in one core shale-related industry from 2015 to 2016: pipeline transportation of natural gas. This industry also had a payroll increase of 23.5 percent. Employment in other core shale-related industries declined. Employment in ancillary shale-related industries grew slightly, by 412 jobs. The number of business establishments in ancillary shale-related industries also increased slightly.

The key occupations in core and ancillary shale-related industries provide family-sustaining wages and tend to require specialized skill sets. In May 2016, 33 of the top 38 jobs in the core shale industries had median annual wages above the state median wage of \$35,760.

In partnership with the U.S. Department of Labor's Bureau of Labor Statistics, the Ohio Department of Job and Family Services' Bureau of Labor Market Information collects and analyzes shale-related employment data for Ohio. The pages that follow provide a synopsis of this information for 2016. For more frequent reports, see *Ohio Shale: Quarterly Economic Trends for Ohio Oil and Gas Industries*. Both the quarterly and annual reports can be found at ohiolmi.com.

A handwritten signature in black ink that reads "Cynthia C. Dungey". The signature is written in a cursive, flowing style.

Cynthia C. Dungey, Director
Ohio Department of Job and Family Services

Introduction

Ohio Revised Code section 6301.12 calls for the publication of an annual report assessing the direct and indirect economic impact of businesses engaged in the production of horizontal wells. This report fulfills that requirement by presenting available economic data on businesses engaged in the production of oil and gas wells in Ohio. This report focuses on employment in core and ancillary shale industries. It does not encompass all economic activity related to Ohio's shale industry. For example, increased business and employment at restaurants and retail stores located near shale development is not reflected in this report. Much of the information in this report reflects data for a group of six industries defined as "core" shale-related industries and a group of 30 industries defined as "ancillary" shale-related industries. While the vast majority of shale-related employment can be found in these industries, not all business establishments in these industries are involved in shale-related activity. For those that are, not all of their products and services and, therefore, their employment are necessarily linked to shale-related economic activity. This is particularly true for the ancillary industries.

This report shows annual employment and business establishment changes in core and ancillary shale-related industries from 2015 to 2016. This includes data for government employment (federal, state and local) in shale-related industries that have significant non-private employment, most notably engineering services, water supply and irrigation systems, sewage treatment facilities, and highway, street and bridge construction. This report also shows worker demand, key occupations in shale-related industries, residency status of new hires in core and ancillary industries, and average wages. It also offers a summary of regional workforce development plans. The final section summarizes the impact of these factors.

Core Shale-Related Industry Employment

Employment in core shale-related industries declined from 2015 to 2016. Overall employment in the core industries dropped 21.0 percent, a loss of 2,842 jobs. Five of the six industries saw declines. One industry, pipeline transportation of natural gas, had an increase of 95 jobs, a 24.2 percent increase. Support activities for oil and gas operations had the largest numeric and percentage losses at -1,123 and -27.0 percent. See Figure 1 for details about employment in the core shale-related industries.

Figure 1. Core Shale-Related Industry Annual Employment Averages and Year-to-Year Change

NAICS	Title	Average Employment, 2015	Average Employment, 2016	Numeric Change	Percent Change
211111	Crude Petroleum and Natural Gas Extraction	1,586	1,352	-234	-14.8%
211112	Natural Gas Liquid Extraction	435	298	-137	-31.5%
213111	Drilling Oil and Gas Wells	1,501	1,116	-385	-25.6%
213112	Support Activities for Oil and Gas Operations	4,165	3,042	-1,123	-27.0%
237120	Oil and Gas Pipeline Construction	5,425	4,367	-1,058	-19.5%
486210	Pipeline Transportation of Natural Gas	392	487	95	24.2%
Core Industries Totals		13,504	10,662	-2,842	-21.0%

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

Business Establishments in Core Industries

The total number of Ohio business establishments in the core shale-related industries dropped by seven from 2015 to 2016, a 0.8 percent decrease. However, two industries added establishments. Oil and gas pipeline construction added nine establishments, and pipeline transportation of natural gas added five establishments. See Figure 2 for details about establishment growth in the core shale-related industries.

Figure 2. Core Shale-Related Industry Annual Establishment Averages and Year-to-Year Change

NAICS	Title	Average Number of Establishments, 2015	Average Number of Establishments, 2016	Numeric Change	Percent Change
211111	Crude Petroleum and Natural Gas Extraction	189	175	-14	-7.4%
211112	Natural Gas Liquid Extraction	20	16	-4	-20.0%
213111	Drilling Oil and Gas Wells	111	110	-1	-0.9%
213112	Support Activities for Oil and Gas Operations	308	306	-2	-0.6%
237120	Oil and Gas Pipeline Construction	166	175	9	5.4%
486210	Pipeline Transportation of Natural Gas	43	48	5	11.6%
Core Industries Totals		837	830	-7	-0.8%

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

Ancillary Shale-Related Industry Employment

Ancillary shale-related industries are indirectly involved with shale oil and gas well drilling and development. These industries provide products or support services to the core shale-related industries and many other industries, as well. Employment in ancillary shale-related industries grew by 412 jobs, a 0.2 percent increase from 2015 to 2016. See Figure 3 for details about employment in the 30 ancillary shale-related industries.

Figure 3. Ancillary Shale-Related Industry Annual Employment Averages and Year-to-Year Change

NAICS	Title	Average Employment, 2015	Average Employment, 2016	Numeric Change	Percent Change
221112	Fossil fuel electric power generation	3,763	3,668	-95	-2.5%
221210	Natural gas distribution	5,315	5,493	178	3.3%
221310	Water supply and irrigation systems	5,990	5,852	-138	-2.3%
221320	Sewage treatment facilities	3,788	3,781	-7	-0.2%
237110	Water and sewer line system construction	5,243	5,772	529	10.1%
237310	Highway, street, and bridge construction	16,194	16,050	-144	-0.9%
238912	Nonresidential site preparation contractors	6,073	6,410	337	5.5%
325110	Petrochemical manufacturing	327	303	-24	-7.3%
325120	Industrial gas manufacturing	732	811	79	10.8%
331110	Iron, steel mills and ferroalloy manufacturing	8,532	7,744	-788	-9.2%
331210	Iron, steel pipe and tube from purchased steel	2,770	2,701	-69	-2.5%
333131	Mining machinery and equipment manufacturing	427	313	-114	-26.7%
333132	Oil and gas field machinery and equipment	246	209	-37	-15.0%
423810	Construction equipment merchant wholesalers	3,567	2,757	-810	-22.7%
423830	Industrial machinery merchant wholesalers	17,285	17,474	189	1.1%
423840	Industrial supplies merchant wholesalers	5,632	5,670	38	0.7%
484110	General freight trucking, local	13,107	13,202	95	0.7%
484220	Other specialized trucking, local	8,215	8,228	13	0.2%
484230	Other specialized trucking, long-distance	5,963	5,939	-24	-0.4%
531190	Lessors of other real estate property	973	971	-2	-0.2%
532412	Other heavy machinery rental and leasing	2,316	2,003	-313	-13.5%
541330	Engineering services	28,891	28,913	22	0.1%
541360	Geophysical surveying and mapping services	352	249	-103	-29.3%
541380	Testing laboratories	6,292	6,731	439	7.0%
541620	Environmental consulting services	1,935	1,949	14	0.7%
562910	Remediation services	3,700	3,786	86	2.3%
811310	Commercial machinery repair and maintenance	8,088	9,042	954	11.8%
924110	Air, water, and waste program administration	6,164	6,169	5	0.1%
924120	Administration of conservation programs	5,805	5,848	43	0.7%
926130	Utility regulation and administration	141	200	59	41.8%
Ancillary Industry Totals		177,826	178,238	412	0.2%

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

Business Establishments in Ancillary Industries

The number of business establishments in ancillary shale-related industries increased by 121 from 2015 to 2016, a 0.9 percent increase. See Figure 4 for details.

Figure 4. Ancillary Shale-Related Industry Annual Establishment Averages and Year-to-Year Change

NAICS	Title	Average Establishments, 2015	Average Establishments, 2016	Numeric Change	Percent Change
221112	Fossil fuel electric power generation	72	72	0	0.0%
221210	Natural gas distribution	148	151	3	2.0%
221310	Water supply and irrigation systems	267	261	-6	-2.2%
221320	Sewage treatment facilities	212	214	2	0.9%
237110	Water and sewer line system construction	364	356	-8	-2.2%
237310	Highway, street, and bridge construction	724	733	9	1.2%
238912	Nonresidential site preparation contractors	628	644	16	2.5%
325110	Petrochemical manufacturing	5	5	0	0.0%
325120	Industrial gas manufacturing	44	45	1	2.3%
331110	Iron, steel mills and ferroalloy manufacturing	60	61	1	1.7%
331210	Iron, steel pipe and tube from purchased steel	38	37	-1	-2.6%
333131	Mining machinery and equipment manufacturing	12	11	-1	-8.3%
333132	Oil and gas field machinery and equipment	10	10	0	0.0%
423810	Construction equipment merchant wholesalers	201	189	-12	-6.0%
423830	Industrial machinery merchant wholesalers	1,604	1,637	33	2.1%
423840	Industrial supplies merchant wholesalers	492	500	8	1.6%
484110	General freight trucking, local	1,396	1,387	-9	-0.6%
484220	Other specialized trucking, local	1,051	1,070	19	1.8%
484230	Other specialized trucking, long-distance	347	338	-9	-2.6%
531190	Lessors of other real estate property	286	289	3	1.0%
532412	Other heavy machinery rental and leasing	193	202	9	4.7%
541330	Engineering services	2,394	2,428	34	1.4%
541360	Geophysical surveying and mapping services	59	59	0	0.0%
541380	Testing laboratories	384	395	11	2.9%
541620	Environmental consulting services	321	326	5	1.6%
562910	Remediation services	203	209	6	3.0%
811310	Commercial machinery repair and maintenance	1,045	1,050	5	0.5%
924110	Air, water, and waste program administration	159	161	2	1.3%
924120	Administration of conservation programs	173	173	0	0.0%
926130	Utility regulation and administration	8	8	0	0.0%
Ancillary Industry Totals		12,900	13,021	121	0.9%

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

Demand for Workers in Shale-Related Occupations

Figures 5 and 6 show the number of online job ads by quarter for the core and ancillary shale-related industries during 2015 and 2016. The number of online job ads for the core shale-related industries was higher during the second and third quarters of 2016 than the second and third quarters of 2015, but lower in the first and fourth quarters.

The number of online job ads for the ancillary shale-related industries was higher in the first two quarters of 2016 than the first two quarters of 2015, but lower in the third and fourth quarters.

These data are from the Help-Wanted OnLine[®] data series; they are an indicator of occupational demand. The series does not include all online job ads, nor does it include jobs not advertised online.

Figure 5. Help Wanted OnLine[®] Job Ads for Core Shale-Related Industries

Quarter	2015	2016	Numeric Change	Percent Change
Q1	55	51	-4	-7.3%
Q2	40	61	21	52.5%
Q3	57	77	20	35.1%
Q4	181	76	-105	-58.0%

Source: The Conference Board, Help Wanted OnLine[®] data series

Figure 6. Help Wanted OnLine[®] Job Ads for Ancillary Shale-Related Industries

Quarter	2015	2016	Numeric Change	Percent Change
Q1	3222	4306	1084	33.6%
Q2	3584	4195	611	17.0%
Q3	4531	4373	-158	-3.5%
Q4	5193	3693	-1500	-28.9%

Source: The Conference Board, Help Wanted OnLine[®] data series

Key Shale-Related Occupations

The occupations listed in this report are not exclusive to any particular industry, but they have a high presence in shale-related industries. Figure 7 shows key occupations in core and ancillary shale-related industries. These occupations are likely to provide family-sustaining wages and tend to require higher skill sets. In May 2016, 33 of the 38 occupations had median annual wages above the state annual median wage of \$35,760.

Figure 7. Key Occupations in Shale-Related Industries

SOC Code	SOC Title	Median Annual Wage	Typical Education, Work Experience, On-the-Job Training Needed
47-5081	Helpers--Extraction Workers	\$26,760	HS dipl./GED, No exper., Moderate-term OJT
43-9061	Office Clerks, General	\$29,230	HS dipl./GED, No exper., Short-term OJT
43-4051	Customer Service Representatives	\$31,070	HS dipl./GED, No exper., Short-term OJT
47-5071	Roustabouts, Oil and Gas	\$32,250	No formal ed. credential, No exper., Moderate-term OJT
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	\$33,790	HS dipl./GED, No exper., Short-term OJT
53-7073	Wellhead Pumpers	\$35,880	HS dipl./GED, Less than 5 years exp., Moderate-term OJT
43-3031	Bookkeeping, Accounting, and Auditing Clerks	\$36,920	Some college-no degree, No exper., Moderate-term OJT
47-2061	Construction Laborers	\$37,200	No formal ed. credential, No exper., Short-term OJT
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	\$37,210	HS dipl./GED, No exper., Moderate-term OJT
51-4121	Welders, Cutters, Solderers, and Brazers	\$37,790	HS dipl./GED, No exper., Moderate-term OJT
47-5013	Service Unit Operators, Oil, Gas, and Mining	\$38,850	No formal ed. credential, No exper., Moderate-term OJT
53-3032	Heavy and Tractor-Trailer Truck Drivers	\$41,740	Postsecondary nondegree award, No exper., Short-term OJT
47-5012	Rotary Drill Operators, Oil and Gas	\$41,950	No formal ed. credential, No exper., Moderate-term OJT
47-5021	Earth Drillers, Except Oil and Gas	\$42,190	HS dipl./GED, No exper., Moderate-term OJT
47-5011	Derrick Operators, Oil and Gas	\$43,020	No formal ed. credential, No exper., Short-term OJT
47-2031	Carpenters	\$44,260	HS dipl./GED, No exper., Apprenticeship
47-2151	Pipelayers	\$44,520	No formal ed. credential, No exper., Short-term OJT
49-9041	Industrial Machinery Mechanics	\$48,270	HS dipl./GED, No exper., Long-term OJT
47-2073	Operating Engineers and Other Construction Equipment Operators	\$50,900	HS dipl./GED, No exper., Moderate-term OJT
49-3042	Mobile Heavy Equipment Mechanics, Except Engines	\$51,190	HS dipl./GED, No exper., Long-term OJT
43-6011	Executive Secretaries and Executive Administrative Assistants	\$51,190	HS dipl./GED, Less than 5 years exp., No OJT
19-4041	Geological and Petroleum Technicians	\$52,030	Associate deg., No exper., Moderate-term OJT
47-2152	Plumbers, Pipefitters, and Steamfitters	\$53,330	HS dipl./GED, No exper., Apprenticeship
51-1011	First-Line Supervisors of Production and Operating Workers	\$57,250	HS dipl./GED, Less than 5 years exp., No OJT
13-1051	Cost Estimators	\$58,050	Bachelor's Deg., No exper., No OJT
49-1011	First-Line Supervisors of Mechanics, Installers, and Repairers	\$61,160	HS dipl./GED, Less than 5 years exp., No OJT
47-1011	First-Line Supervisors of Construction Trades and Extraction Workers	\$61,430	HS dipl./GED, 5 years or more exp., No OJT
13-1199	Business Operations Specialists, All Other	\$63,930	Bachelor's Deg., No exper., No OJT
13-2011	Accountants and Auditors	\$63,980	Bachelor's Deg., No exper., No OJT
53-7071	Gas Compressor and Gas Pumping Station Operators	\$64,090	HS dipl./GED, No exper., Moderate-term OJT
51-8093	Petroleum Pump System Operators, Refinery Operators, and Gaugers	\$64,440	HS dipl./GED, No exper., Long-term OJT
19-2042	Geoscientists, Except Hydrologists and Geographers	\$68,910	Bachelor's Deg., No exper., No OJT
51-8092	Gas Plant Operators	\$69,350	HS dipl./GED, No exper., Long-term OJT
17-2112	Industrial Engineers	\$78,940	Bachelor's Deg., No exper., No OJT
15-1121	Computer Systems Analysts	\$83,480	Bachelor's Deg., No exper., No OJT
11-9021	Construction Managers	\$86,960	Bachelor's Deg., No exper., Moderate-term OJT
11-1021	General and Operations Managers	\$90,920	Bachelor's Deg., 5 years or more exp., No OJT
17-2171	Petroleum Engineers	\$95,910	Bachelor's Deg., No exper., No OJT

Source: U.S. Bureau of Labor Statistics, Occupational Employment Statistics, May 2016

From 2015 to 2016, the estimated number of construction trades jobs in core shale-related industries in Ohio decreased by 21.2 percent, from 3,945 to 3,109. Oil and gas pipeline construction had the largest losses. The number of extraction trade jobs decreased by 25.4 percent, from 2,063 to 1,545. Most of the decrease in extraction jobs was in support activities for oil and gas operations. See Figure 8 for details.

Figure 8. Estimated Number of Construction and Extraction Jobs in the Core Shale-Related Industries

NAICS	Title	2015		2016		2015-2016 Numeric Change	
		Construction Trades	Extraction Trades	Construction Trades	Extraction Trades	Construction Trades	Extraction Trades
211111	Crude Petroleum and Natural Gas Extraction	59	190	50	162	-9	-28
211112	Natural Gas Liquid Extraction	16	52	11	36	-5	-16
213111	Drilling Oil and Gas Wells	278	446	206	331	-71	-114
213112	Support Activities for Oil and Gas Operations	771	1,237	563	903	-208	-334
237120	Oil and Gas Pipeline Construction	2,805	136	2,258	109	-547	-26
486210	Pipeline Transportation of Natural Gas	17	2	21	2	4	0
Core Industries Totals		3,945	2,063	3,109	1,545	-836	-518

Source: Ohio Bureau of Labor Market Information

Shale-Related Industries' Worker State of Residence

Although data are not available on the state of residence for all workers, limited information is available from the State Directory of New Hires. This database was developed to help collect child support. State law requires all Ohio employers to report all independent contractors and newly hired and rehired employees to the directory within 20 days of the hire or rehire date.¹ Hiring activities that generate W-4 tax forms are included in the data.

On average in 2016, core-industry Ohio employers reported an average of 602 new hires from Ohio and 423 new hires from other states each quarter. This was a 26.1 percent decrease from 2015 for in-state new hires and a 25.5 percent decrease for out-of-state new hires. Ohioans accounted for 58.7 percent of new hires in the core industries; this was a negligible decrease from 58.9 percent in 2015. See Figure 9 for details.

Ancillary shale-related industry employers reported an average of 8,748 Ohio new hires and 2,919 out-of-state new hires each quarter during 2016. This was a 0.8 percent increase over 2015 for Ohio new hires and a 0.3 percent decrease for out-of-state new hires. In 2016, 75.0 percent of new hires in ancillary shale-related industries were from Ohio; this was a negligible increase from 74.8 percent in 2015. See Figure 10 for details.

¹ Ohio Revised Code Section 3121.89-3121.8911 and the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) of 1996, 42 U.S.C. 653a.

Figure 9. 2015 and 2016 Average Quarterly New Hires in the Core Shale-Related Industries

State of Residence	2015	2016	Numeric Change	Percent Change
Ohio	815	602	(213)	-26.1%
Total Out-of-State	568	423	(145)	-25.5%
Indiana	10	10	-	0.0%
Kentucky	31	30	(1)	-3.2%
Michigan	68	29	(39)	-57.4%
Pennsylvania	102	100	(2)	-2.0%
West Virginia	83	120	37	44.6%
All Other States	274	134	(140)	-51.1%

Source: Ohio Directory of New Hires

Figure 10. 2015 and 2016 Average Quarterly New Hires in the Ancillary Shale-Related Industries

State of Residence	2013	2014	Numeric Change	Percent Change
Ohio	8,681	8,748	67	0.8%
Total Out-of-State	2,927	2,919	(8)	-0.3%
Indiana	277	269	(8)	-2.9%
Kentucky	224	229	5	2.2%
Michigan	175	163	(12)	-6.9%
Pennsylvania	339	321	(18)	-5.3%
West Virginia	204	212	8	3.9%
All Other States	1,708	1,725	17	1.0%

Source: Ohio Directory of New Hires

Total Wage Growth in the Core Shale-Related Industries

Total wages in the core shale-related industries declined 22.6 percent from 2015 to 2016. In comparison, total wages across all industries in Ohio increased 2.1 percent over the same period. Only pipeline transportation of natural gas, which added workers, had an increase in total payroll; its payroll increased 23.5 percent. See Figure 11 for detailed industry wage data.

Figure 11. Core Shale-Related Industry Total Wages and Year-to-Year Change

NAICS	Title	Total Wages (thousands), 2015	Total Wages (thousands), 2016	Numeric Change (thousands)	Percent Change
211111	Crude Petroleum and Natural Gas Extraction	\$105,970	\$96,376	-\$9,594	-9.1%
211112	Natural Gas Liquid Extraction	\$30,743	\$25,439	-\$5,304	-17.3%
213111	Drilling Oil and Gas Wells	\$107,217	\$77,522	-\$29,695	-27.7%
213112	Support Activities for Oil and Gas Operations	\$272,466	\$197,136	-\$75,330	-27.6%
237120	Oil and Gas Pipeline and Related Structures Construction	\$468,773	\$349,770	-\$119,003	-25.4%
486210	Pipeline Transportation of Natural Gas	\$34,447	\$42,529	\$8,082	23.5%
Core Industries Totals		\$1,019,616	\$788,772	-\$230,844	-22.6%

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

Regional Workforce Development Plans

Ohio's workforce development boards establish local policies for workforce services funded by the federal Workforce Innovation and Opportunity Act. They also develop four-year plans to identify target populations, in-demand occupations and employment trends, in order to guide service delivery to support growing industries and successful job placement. The four-year plans are either regional plans developed by multiple local areas assigned by the state, or local plans developed by a single local area. The workforce development boards are required to submit these plans to the Ohio Department of Job and Family Services, which reviews them for viability, especially as they relate to compliance and performance. The most recently submitted plans were effective July 1, 2017.

Local workforce development boards are required to submit biannual amendments to their plans. The amendments reflect planned changes in service delivery to respond to evolving economic and occupational needs. Local areas that identify occupations in shale-related core and ancillary industries as in-demand occupations include that information in their local plans and policies.

Summary

Employment increased in one of Ohio's six core-related shale industries from 2015 to 2016: pipeline transportation of natural gas. However, overall employment in core shale-related industries declined, mirroring national trends. The number of Ohio jobs in core industries dropped from 13,504 to 10,662, and the number of business establishments in core industries dropped from 837 to 830.

Employment growth in the ancillary shale-related industries increased slightly, from 177,826 to 178,238. Ancillary shale-related businesses serve other industries in addition to oil and gas extraction.

Employer demand for occupations in the core shale-related industries, as measured by online job ads, declined from 2015 to 2016. The estimated number of construction trade jobs in the core shale-related industries declined 21.2 percent, and the number of extraction trade jobs declined 25.4 percent.

The median annual wages for key shale-related jobs range from \$26,760 to \$95,910. However, total wages for the core shale-related industries declined 22.6 percent from 2015 to 2016, as a result of the overall employment decline.

Although data are not available on the state of residence for all workers, limited information is available from the State Directory of New Hires. Among the core shale-related industries, 58.7 percent of new hires were Ohio residents in 2016. Among the ancillary industries, 75.0 percent of new hires were Ohio residents.

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Ohio Department of Job and Family Services
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Office of Workforce Development
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Bureau of Labor Market Information
<http://OhioLMI.com>

July 2017

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