



STEUBENVILLE, OH SOUTH END DISTRICT

Opportunity Zone Strategy

May 2023



ACKNOWLEDGEMENTS

Technical Assistance Pertaining to the Attraction of New Developments in the South End Downtown District of Steubenville, OH – Opportunity Zone #39081000800

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KEY FINDINGS

MARKET ASSESSMENT

Trade Area

A trade area analysis was performed for Downtown Steubenville using Placer AI location data tracking the movement of people from place to place. The True Trade Area (based on actual visitation) of Downtown Steubenville sees frequent visitation from as far west as Bloomingdale, OH, as far north as Stratton, OH and New Cumberland, WV, and as far south as Yorkville, OH and Wellsburg, WV. Less frequent visits extend west to Scio, OH, north to East Liverpool, OH, and south to the Interstate 70 corridor in the vicinity of Wheeling, WV. The eastern limits of the trade area end abruptly at the WV/PA state line indicating that the Pittsburgh metro area is not traveling regularly to Downtown Steubenville.

In addition to Downtown Steubenville, visitation to Fort Steuben and Franciscan University were also assessed. The buying power of visitors to Downtown Steubenville and Fort Steuben are similar, while visitors to nearby Franciscan University have higher income levels presenting a desirable and realistically attainable target market for South End District development.

Market Constraints & Opportunities

Several socioeconomic factors are indicative of economic distress in Steubenville's South End District, but also present opportunities for strategic community development that meets the needs of a traditionally underserved Appalachian community:

- **Food Desert** – The South End District has limited access to healthy food and is defined as a food desert by the US Department of Agriculture (USDA) presenting a quantified market need for a local grocer.
- **Limited Mobility** – Citywide, 19.6% of Steubenville households lack access to a personal vehicle, which is 2.5 times higher than the statewide average (7.8%). The lack of access to personal vehicles indicates a need for transit-oriented development.
- **Aging Housing Stock** – Citywide, 90% of Steubenville's housing stock was built before 1980. New single family detached units and multifamily units (both sale and rental) are needed for moderate income households (50-80% AMI) along with upper income households (greater than 100% AMI).
- **Loss of Industry & Innovation** – No industry sector has seen job growth in the Weirton-Steubenville MSA since 2010, while utility patent activity has dropped off almost completely since 1998 indicating a decline in industrial innovation. Given Steubenville's central location between several major metro areas (Columbus, OH to west, Pittsburgh to east, and Youngstown-Warren to north), local job losses can be offset by opportunities to train the future workforce of Appalachia in the Tri-State area, especially in the building trades given the prevalence of major construction projects in all directions.

KEY FINDINGS

PROPOSED CONCEPT

Based on the quantitative findings of the market assessment and community input gathering at two local stakeholder workshops the following development themes are recommended to transform Steubenville's South End into a vibrant mixed-use district:

- Healthy Lifestyles anchored by a local grocery store;
- Workforce Housing anchored by a Transit-Oriented Development (TOD);
- Innovation District anchored by a job skills training center; and
- Trail Town anchored by tourism retail for a planned Cleveland to Pittsburgh (C2P) regional trail.

DEVELOPMENT STRATEGY

Opportunity Zone

Steubenville's South End District location in a federally designated Opportunity Zone offers financial incentives for individuals who invest their capital gains in a Qualified Opportunity Fund (QOF). There are established QOFs that invest in projects nationwide or in target geographies. QOFs generally have one or more targeted types of development which may be broad (e.g. multifamily residential) or specific (e.g. student housing). Some QOFs have a social impact mission, while others are only focused on generating the highest possible return on investment. While some established QOFs are active in smaller Appalachian communities, many QOFs are focused on Opportunity Zone census tracts in larger, high-growth metro areas where gentrification is taking place and investment yields are higher.

In the alternative, an high-wealth individual or group of local or regional investors could pool their capital gains to form their own QOF focused on projects in Steubenville and similar Appalachian communities where they have a personal interest and commitment.

A separate Opportunity Zone Investor Education session was held as part of the project with a summary presentation providing an overview of how this federal tool can be potentially leveraged in Steubenville.



Stakeholder Meetings in Steubenville helped shaped the Development Strategy



KEY FINDINGS

Other Complementary Tools

Even if a developer utilizes a QOF to advance a real estate development project in Steubenville, the QOF is unlikely to be the sole incentive used in their financial “capital stack”. In order to entice commercial real estate investment in a highly distressed market like the South End District, multiple layers of financial incentives will likely be required. Several relevant options include:

- [Port Authority Site Assembly & Financing](#) – Jefferson County Port Authority has broad powers under Ohio Revised Code Section 4582 gives port authorities a wide range of powers to facilitate site assembly, infrastructure development, and project financing through bonds and lease structures.
- [Tax Increment Financing \(TIF\)](#) – The land value capture of future improvements to real property through a TIF district is a logical source of funding for catalytic infrastructure such as the proposed gateway intersection reconfiguration, especially in a municipality that is fiscally constrained.
- [Downtown Redevelopment District \(DRD\) & Innovation District](#) – A 10-acre maximum DRD(s) could be formed around one or more building on the National Register of Historic Places to allow for TIF-like mechanism that provides additional flexibility to use DRD proceeds for not only public infrastructure but also for historic building rehabilitation loans or grants, non-historic building rehabilitation loans, and marketing and promotion of the district. If 100 Gbps upload/download broadband speeds are provided in the DRD, it can also be designated as an Innovation District that can provide loans/grants to tech-related businesses and business incubators/accelerators.
- [New Markets Tax Credits \(NMTC\)](#) – All certified Opportunity Zone census tracts are eligible for the NMTC program which attracts private capital into low-income communities by permitting individual and corporate investors to receive a tax credit against their federal income tax in exchange for making equity investments in specialized financial intermediaries called Community Development Entities (CDEs).
- [Appalachian Community Grant Program \(ACGP\)](#) – The State of Ohio’s ACGP authorized through House Bill 377 provides a generational funding opportunity in the state’s 32 Appalachian counties for certain transformational regional projects advancing downtown revitalization, workforce development, and community health. Civic realm improvements that enhance the South End District as it relates to cultural, recreational, and ecotourism – such as enhanced public access to a regional Trail Town, Fort Steuben, and the Ohio River – may be competitive as part of a larger regional funding request.

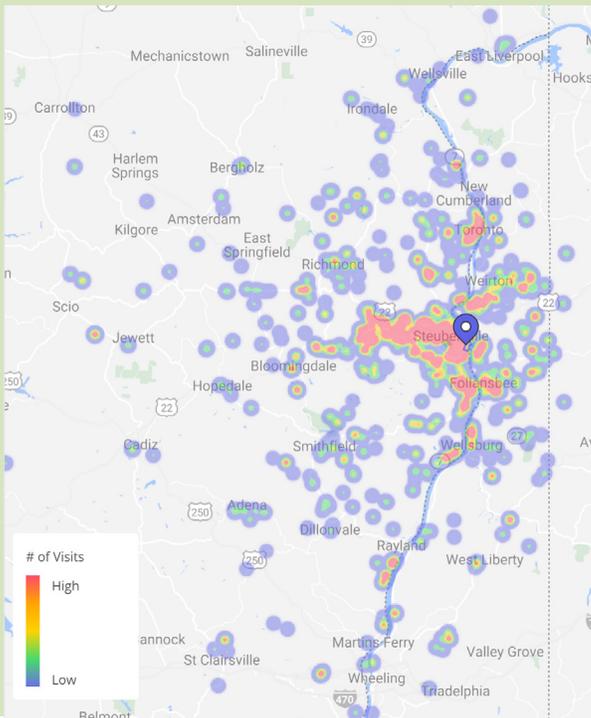
STUDY AREA



MARKET ASSESSMENT

True Trade Area

True Trade Area - Downtown Steubenville Past 12 Months



A trade area is the geographic area where most of a property's visitors live or work. Traditionally a property's trade area was measured as a ring radius around the property. But since most visitors don't live in neat circles around the properties they visit, the ring radius fails to accurately measure a property's reach.

Location data technology (i.e. cell phone data) is redefining how trade areas are measured and assessed. The true trade area represents the trade area drawn from the actual volume of visitors that visit an area or a property. The true trade area shown below is derived from cell phone data collected over the past 12 months by Placer.ai as defined by traffic volumes to and from Downtown Steubenville.



1.1 Million Visits
(Similar to Pre Pandemic Levels)



97 Min.
Average Dwelling Time



5.7 Per Year
Average Visit Frequency

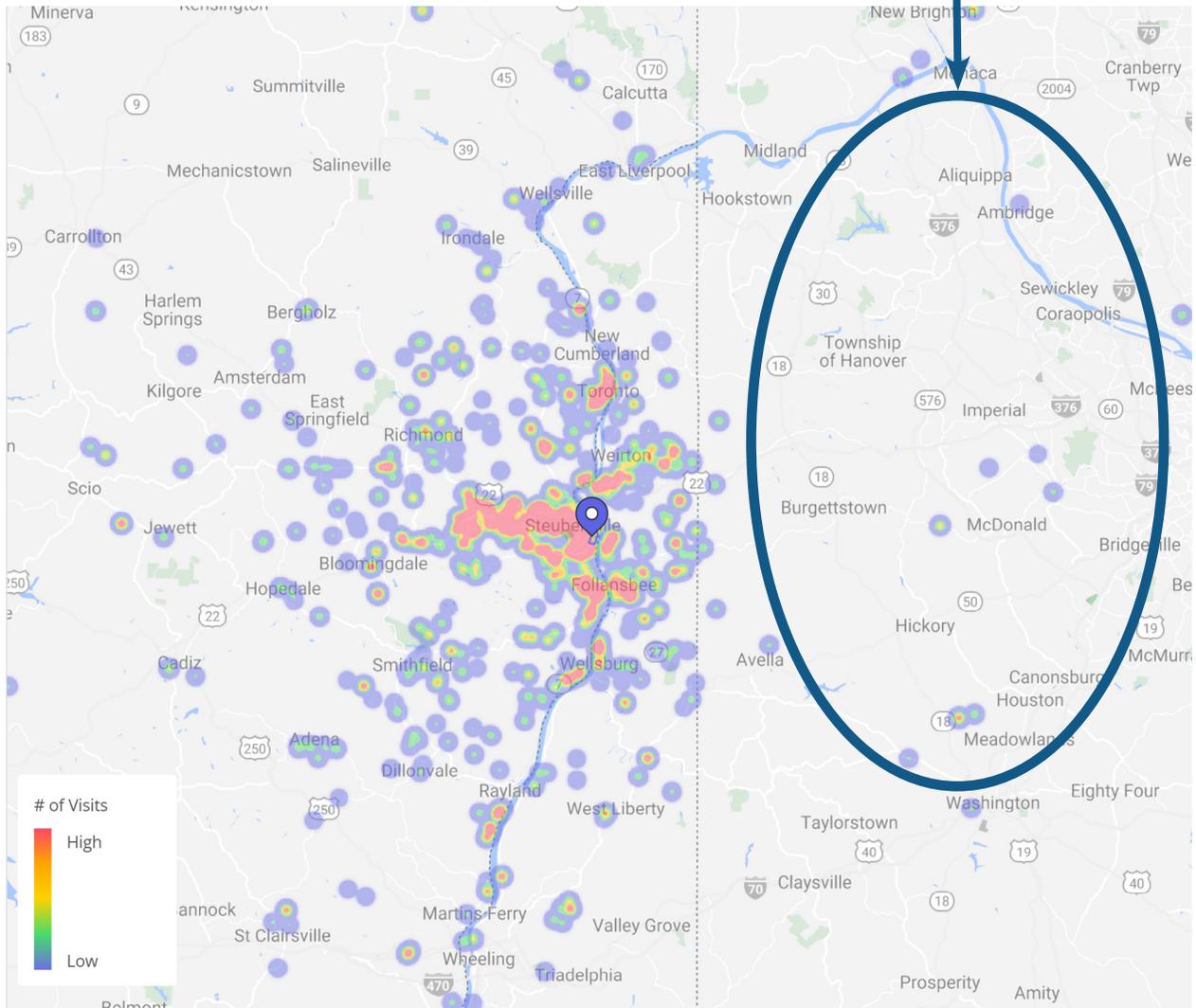


\$46K
Median Household Income in True Trade Area

MARKET ASSESSMENT

True Trade Area
- Downtown
Steubenville Past
12 Months

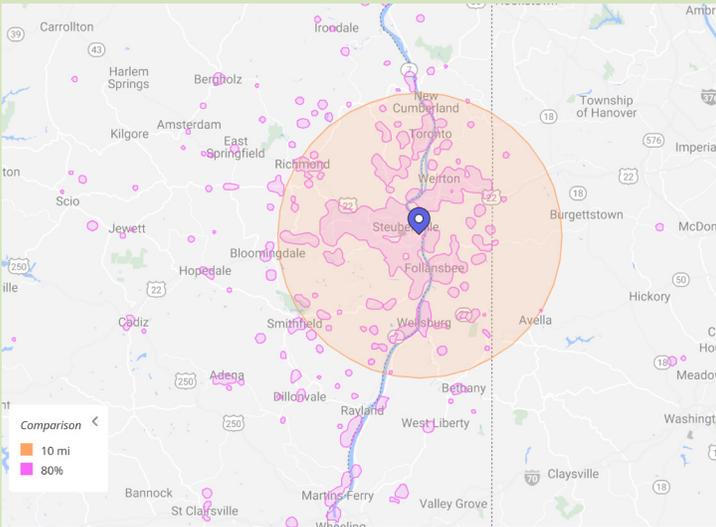
Pittsburgh Metro
does not travel
to Steubenville
frequently



MARKET ASSESSMENT

Trade Area Comparison

10 Mile vs. True Trade Area Downtown Steubenville



80% of visits to Downtown Steubenville originate from pink area



88K - 10 Mile
101K - True
Total Population

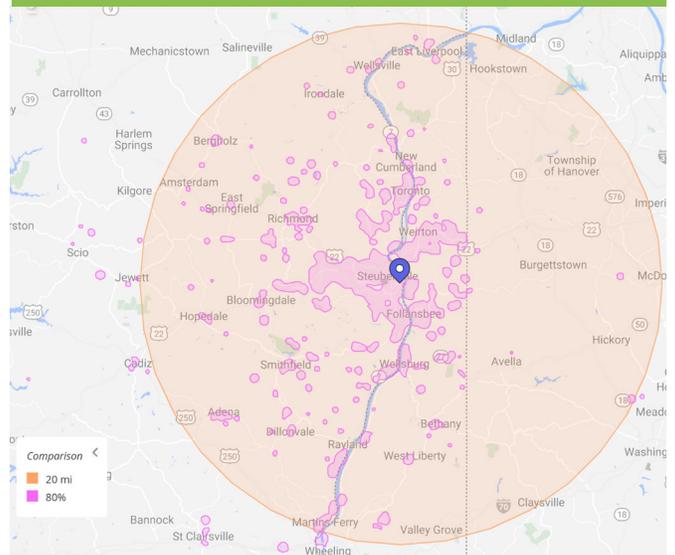


45.2 - 10 Mile
42.6 - True
Median Age



\$49K - 10 Mile
\$46K - True
Median Household Income

20 Mile vs. True Trade Area Downtown Steubenville



80% of visits to Downtown Steubenville originate from pink area



201K - 20 Mile
101K - True
Total Population



43.8 - 20 Mile
42.6 - True
Median Age



\$51K - 20 Mile
\$46K - True
Median Household Income

MARKET ASSESSMENT

LARGEST UNMET DEMAND BY RETAIL SECTOR

\$145M

Electronic Shopping

including: mail-order houses, vending machine operators, home delivery sales, door-to-door sales, party plan sales, electronic shopping.

\$58M

Grocery Stores

including: establishments primarily engaged in retailing a general line of food products primarily from fixed point-of-sale locations.

\$14M

Gasoline Stations

including: retail automotive fuels and automotive oils or retail these products in combination with convenience store items.

\$10M

Automotive Dealers

including: industries in the Motor Vehicle and Parts Dealers subsector retail motor vehicles and parts from fixed point-of-sale locations.

MARKET ASSESSMENT

MARKET PSYCHOGRAPHICS EXPERIAN MOSAIC LARGEST GROUPS



Autumn Years

3,998 Households (30.3%)

Established and mature couples living gratified lifestyles in older homes



Thrifty Habits

1,646 Households (12.5%)

Cost-conscious adults living alone in urban areas



Family Union

1,351 Households (10.2%)

Middle income, middle-aged families living in homes supported by solid blue-collar occupations

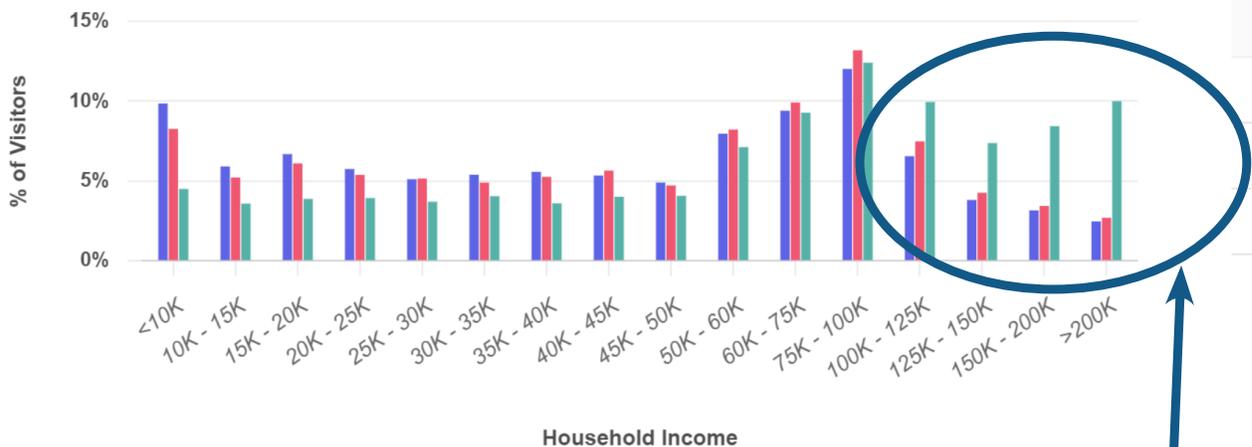
All data shown is based on the 40% traffic volume true trade area (where 40% of visits to Downtown Steubenville originate based on cell phone data courtesy of Placer.ai) around Downtown Steubenville for the past 12-month period.

MARKET ASSESSMENT

Income & Housing

Household Income of Visits for past 12-months

- Downtown Steubenville**
100 N 4th St Steubenville, OH
- Fort Steuben**
120 S 3rd St, Steubenville, OH
- Franciscan University**
1235 University Blvd, Steubenville,



	Average	Median
	61K	45K
	65K	49K
	98K	72K

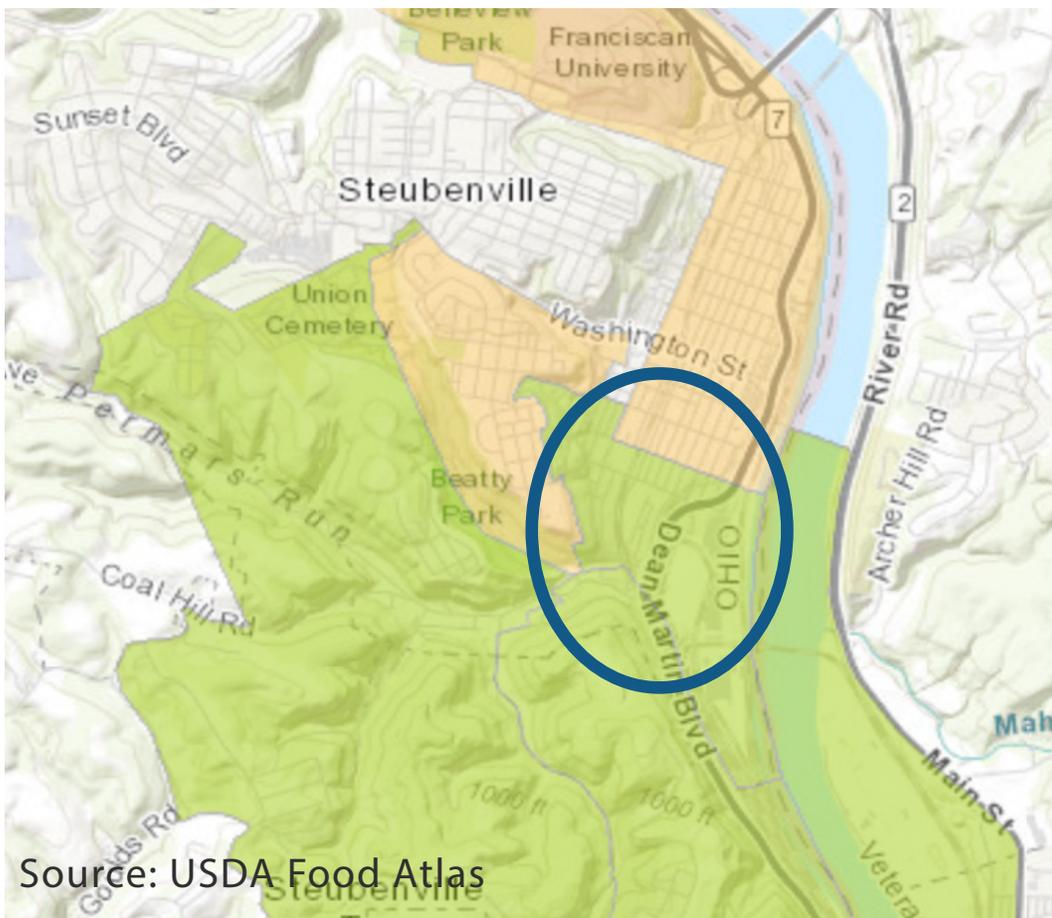
Franciscan visitors have higher incomes -
Need to entice this market to spend time & disposable income in South End.

MARKET ASSESSMENT

LIMITED ACCESS TO HEALTHY FOODS

\$58M

IN UNMET DEMAND ANNUALLY IN
DOWNTOWN STEUBENVILLE TRUE
TRADE AREA FOR GROCERY STORES



Orange: Low-income census tracts where a significant number or share of residents are more than ½ mile from grocer.

Green: Low-income census tracts where a significant number or share of residents are more than 1 mile from grocer.

MARKET ASSESSMENT

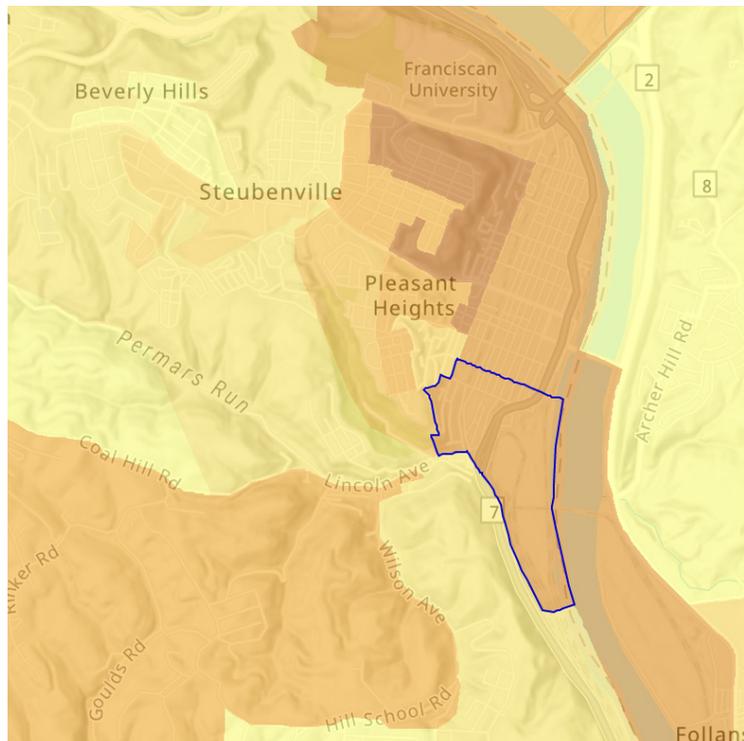
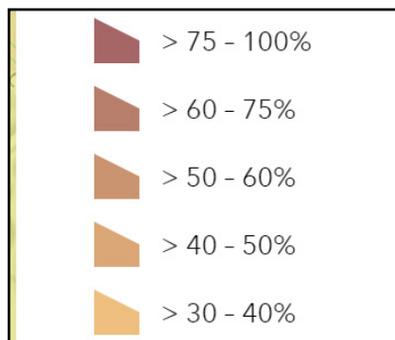
MARKET CONSTRAINT: LIMITED MOBILITY

19.6% 

of City of Steubenville households lack access to a personal vehicle, compared to just 7.8% of household statewide. This indicates a need for transit-oriented development with households in close proximity to transit service.

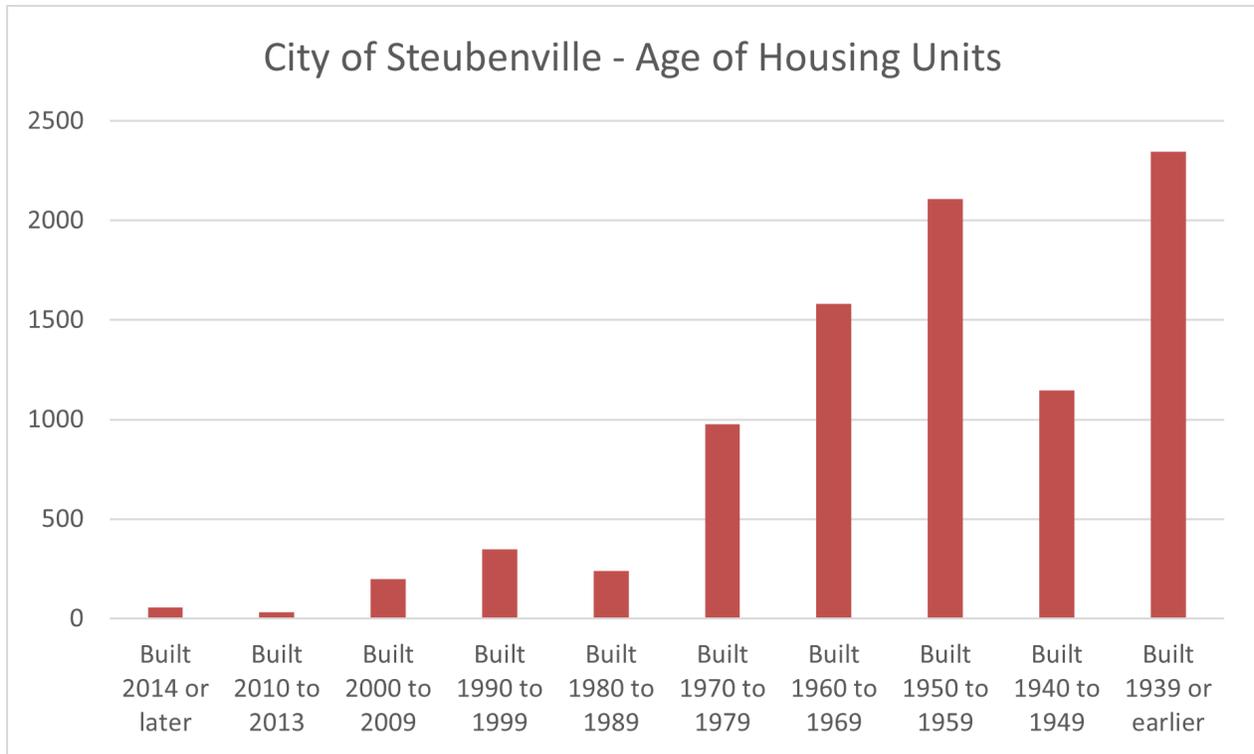
Source: 2020 ACS 5-Year Estimate

50% - 60% of households in the study area lack vehicle access



MARKET ASSESSMENT

NEW HOUSING NEEDED IN CITY OVER 90% OF HOUSING UNITS BUILT BEFORE 1980!



Source: American Community Survey 2020



Per Steubenville's Consolidated Plan - "Single family detached units and multi-family units that are in move in condition not requiring rehabilitation-newly constructed modern units (both sale and rental) are needed for moderate income households (50-80% AMI) along with upper income households (greater than 100% AMI)."

Trade Clusters

WEIRTON-STEUBENVILLE METROPOLITAN STATISTICAL AREA (MSA)

High Employment Specialty Trade Clusters

Upstream Metal Manufacturing

1,329 Employed

1,115 Jobs lost since 2010 (3rd largest in MSA)

Distribution & Electronic Commerce

1,220 Employed

700 Jobs lost since 2010 (6th largest in MSA)

No job growth in any cluster since 2010

Local Industries with Competitive Advantages

NAICS 4-Digit Industry	Annual Average Employment	Annual Wages per Employee	Annual Average Employment Location Quotient
Petroleum and coal products manufacturing	557	87,572	21.2
Coating, engraving, heat treating, and allied activities	447	81,690	14.24
Gambling industries	265	16,824	11.39
Electric power generation, transmission and distribution	570	122,228	5.97
Death care services	114	33,553	3.39

MARKET ASSESSMENT

Loss of Innovation

The Weirton-Steubenville MSA ranks dead last of all MSA's in new patent requests.

New patents requests are a sign of innovation and are indicative in high growth industries.

Innovation

Weirton, WV Metropolitan Area Utility Patents per 10k employees 1998-2015

growth rate

-10.03% 99 rank

0.49

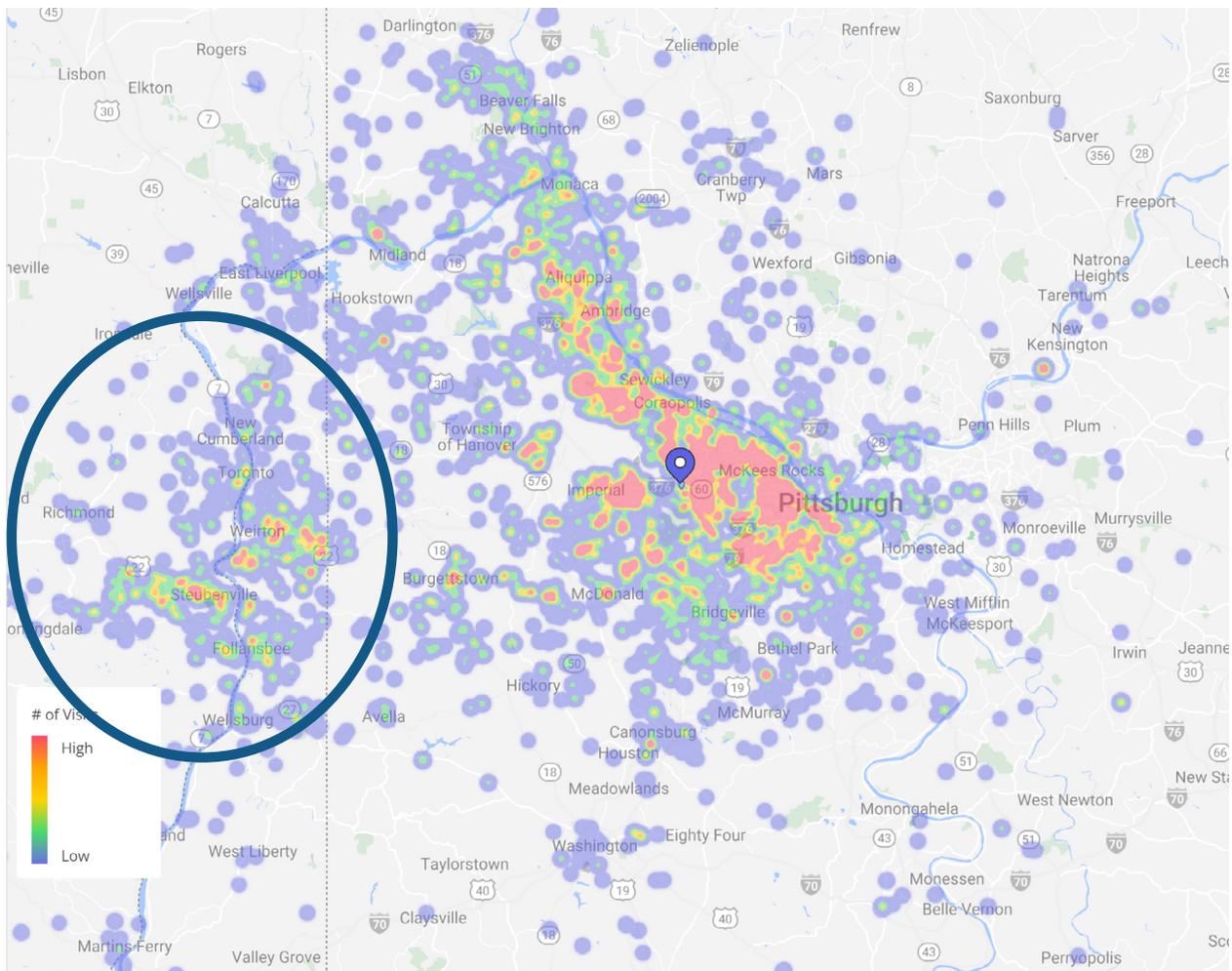


MARKET ASSESSMENT



STEUBENVILLE TRAVELS TO PITTSBURGH

The map to the right represents the true trade area for The Mall at Robinson Town Center over the past 12 months with a minimum of 5 visits. As illustrated, a large number of residents travel to Pittsburgh for retail. Steubenville could provide job skills training for a workforce across the Tri-State region, especially with Steel Valley Regional Transit Authority connectivity to Robinson Town Center's regional transit hub.



MARKET ASSESSMENT

PITTSBURGH MSA

Pittsburgh's High Employment Specialty Trade Clusters...



Business Services



Education & Knowledge Creation



Distribution & Electronic Commerce

... Have High Employment Growth

Weirton-Steubenville Trade Cluster Overlap

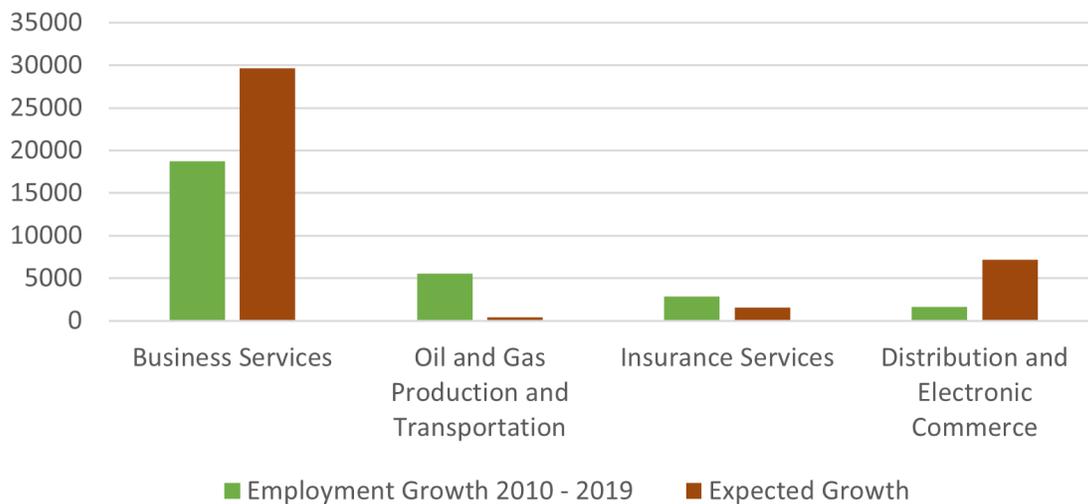
Distribution & Electronic Commerce

Over 40,000 employed in Pittsburgh MSA

1,660 Jobs gained since 2010 (4th highest in Pittsburgh MSA)

Also high employment cluster in Weirton MSA)

Pittsburgh MSA Largest Employment Growth by Job Cluster 2010 to 2019 & Expected Growth



COMMERCIAL REAL ESTATE MARKET ANALYTICS: JEFFERSON COUNTY



Industrial

12 MO NET ABSORPTION SF 29.4K +135.3% Prior Period (83.5K)	VACANCY RATE 1.9% -0.7% Prior Period 2.6%	MARKET RENT/SF \$5.98 +8.0% Prior Period \$5.53	MARKET SALE PRICE/SF \$52 +12.5% Prior Period \$46	MARKET CAP RATE 9.1% +0.1% Prior Period 9.0%
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Office

12 MO NET ABSORPTION SF (12K) -25.9% Prior Period (9.5K)	VACANCY RATE 4.0% +1.0% Prior Period 3.0%	MARKET RENT/SF \$15.38 +2.3% Prior Period \$15.03	MARKET SALE PRICE/SF \$102 +2.7% Prior Period \$99	MARKET CAP RATE 9.7% +0% Prior Period 9.7%
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Retail

12 MO NET ABSORPTION SF 48.7K +615.5% Prior Period (9.4K)	VACANCY RATE 4.2% -1.2% Prior Period 5.4%	MARKET RENT/SF \$10.11 +5.4% Prior Period \$9.59	MARKET SALE PRICE/SF \$85 +2.2% Prior Period \$83	MARKET CAP RATE 8.7% +0.1% Prior Period 8.6%
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Multi-Family

12 MO ABSORPTION UNITS (14) +46.1% Prior Period (25)	VACANCY RATE 11.5% +0.8% Prior Period 10.7%	MARKET RENT/UNIT \$696 +2.4% Prior Period \$680	MARKET SALE PRICE/UNIT \$59.9K +6.6% Prior Period \$56.2K	MARKET CAP RATE 7.5% +0% Prior Period 7.5%
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PROPOSED CONCEPT

HIGHEST & BEST USE ASSESSMENT INITIAL THEMES

Healthy Lifestyles



Grocery

Workforce Housing



Transit-Oriented
Development

Innovation District



Jobs Skills
Training

Trail Town



Tourism
Retail

Redevelopment Concept Areas



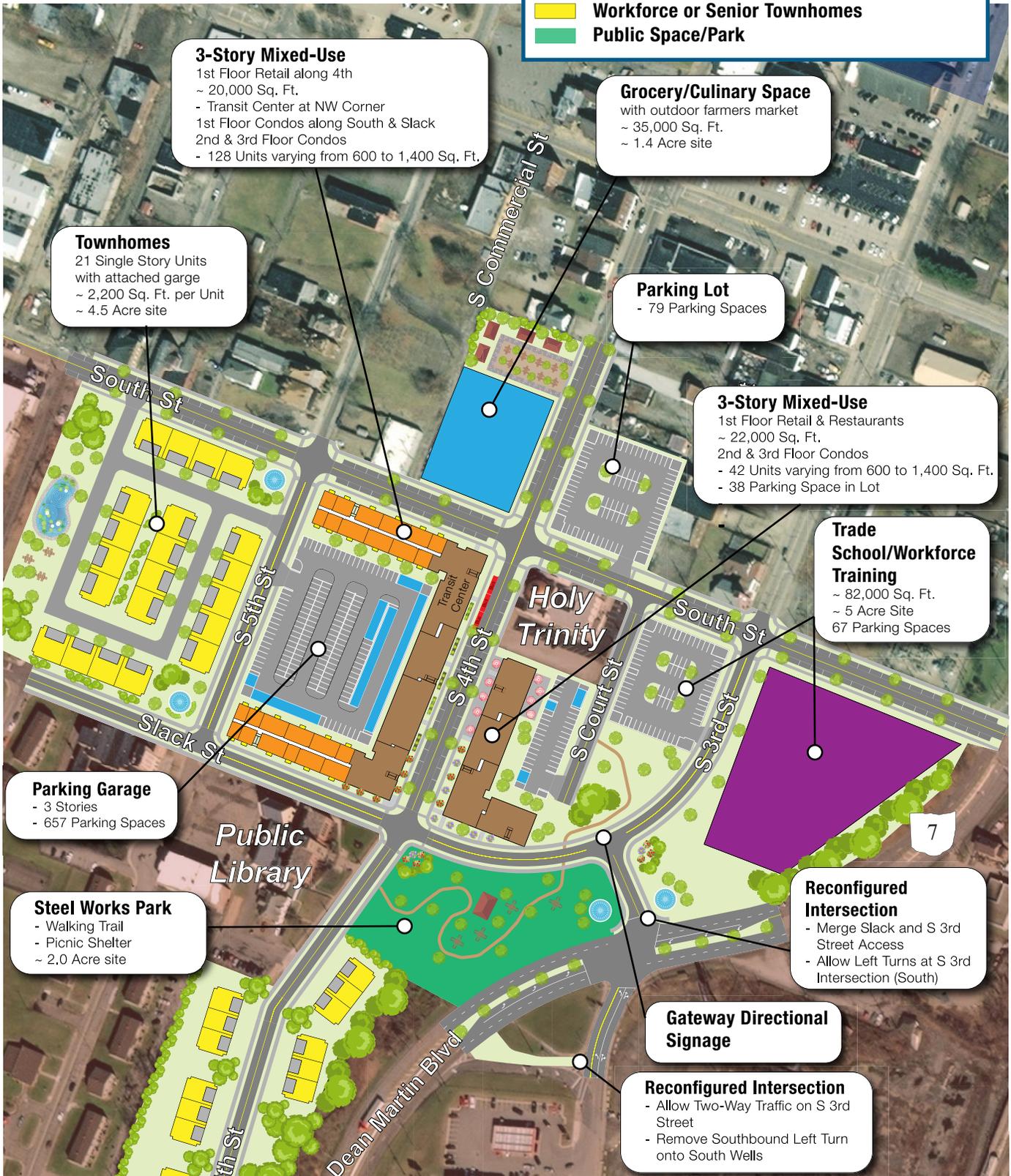
Legend

- Study Area
- Qualified Opportunity Zone
- Carpenter's Trade School
- Innovation District Mixed-Use
- Culinary/Incubator Maker Space
- Multifamily Housing
- Senior or Workforce Housing
- Public Space/Park
- Downtown Redevelopment District (DRD)

↑ N

PROPOSED SITE PLAN

- Qualified Opportunity Zone
- Trade School/Workforce Training
- Retail/Restaurant within Mixed-Use Building
- Grocery/Culinary Space
- Studio to 3 Bedroom Condos
- Workforce or Senior Townhomes
- Public Space/Park



3-Story Mixed-Use
 1st Floor Retail along 4th
 ~ 20,000 Sq. Ft.
 - Transit Center at NW Corner
 1st Floor Condos along South & Slack
 2nd & 3rd Floor Condos
 - 128 Units varying from 600 to 1,400 Sq. Ft.

Grocery/Culinary Space
 with outdoor farmers market
 ~ 35,000 Sq. Ft.
 ~ 1.4 Acre site

Townhomes
 21 Single Story Units
 with attached garage
 ~ 2,200 Sq. Ft. per Unit
 ~ 4.5 Acre site

Parking Lot
 - 79 Parking Spaces

3-Story Mixed-Use
 1st Floor Retail & Restaurants
 ~ 22,000 Sq. Ft.
 2nd & 3rd Floor Condos
 - 42 Units varying from 600 to 1,400 Sq. Ft.
 - 38 Parking Space in Lot

Trade School/Workforce Training
 ~ 82,000 Sq. Ft.
 ~ 5 Acre Site
 67 Parking Spaces

Parking Garage
 - 3 Stories
 - 657 Parking Spaces

Steel Works Park
 - Walking Trail
 - Picnic Shelter
 ~ 2.0 Acre site

Reconfigured Intersection
 - Merge Slack and S 3rd Street Access
 - Allow Left Turns at S 3rd Intersection (South)

Gateway Directional Signage

Reconfigured Intersection
 - Allow Two-Way Traffic on S 3rd Street
 - Remove Southbound Left Turn onto South Wells

7

NEW GATEWAY DISTRICT: Potential Workforce Training Center Anchor



- Qualified Opportunity Zone
- Trade School/Workforce Training
- Retail/Restaurant within Mixed-Use Building

- Grocery/Culinary Space
- Studio to 3 Bedroom Condos
- Workforce or Senior Townhomes
- Public Space/Park



DEVELOPMENT STRATEGY

Opportunity Zone

Steubenville's South End District location in a federally designated Opportunity Zone offers financial incentives for individuals who invest their capital gains in a Qualified Opportunity Fund (QOF). There are established QOFs that invest in projects nationwide or in target geographies. QOFs generally have one or more targeted types of development which may be broad (e.g. multifamily residential) or specific (e.g. student housing). Some QOFs have a social impact mission, while others are only focused on generating the highest possible return on investment. While some established QOFs are active in smaller Appalachian communities, many QOFs are focused on Opportunity Zone census tracts in larger, high-growth metro areas where gentrification is taking place and investment yields are higher. The next two pages highlight some of the established QOFs that cover the Appalachian Ohio service area.

OPPORTUNITY ZONE BASICS



DEVELOPMENT STRATEGY

Qualified Opportunity Fund	Project Type	Geography	Description
LNWA OZ Fund I, LLC	Real Estate - Workforce Housing	Delaware, Maryland, the District of Columbia, Pennsylvania, New Jersey, New York, Connecticut, Maine, Ohio, Virginia & West Virginia	Leon N. Weiner & Associates (LNWA) is a nationally recognized homebuilder and developer of affordable housing. LNWA works, in concert with our partners, to catalyze the development of urban infill, suburban, and rural communities.
PNC OPZONE Community Development Fund, Inc.	Real Estate & Businesses	PNC's Community Development Banking portfolio which covers 20 states including Ohio.	Projects include affordable housing for low- or moderate-income (LMI) individuals; community services targeted to LMI populations; activities that promote economic development by financing small businesses or farms; and neighborhood revitalization or stabilization activities.

PNC APPALACHIAN CASE STUDY:

The Doris on Main is a 46-unit general occupancy apartment community by Woda Cooper Companies that broke ground in 2022 in Downtown Wheeling, WV and received a QOF investment from PNC.



DEVELOPMENT STRATEGY

Qualified Opportunity Fund	Project Type	Geography	Description
Savage Grant Opportunity Zone Fund	Businesses - Energy, Infrastructure & Technology industries	Appalachia - Businesses that are located in or are committed to employing through remote work individuals from communities in Appalachia.	Investments are primarily focused on companies that have durable competitive strengths and good returns on the net tangible assets required to operate the business. Goals are promoting (1) environmental sustainability, (2) human capital growth, and (3) economic equality.
Woodforest CEI-Boulos Opportunity Fund	Real Estate – Workforce Housing	Alabama, Florida, Georgia, Illinois, Indiana, Kentucky, Louisiana, Maryland, Mississippi, New York, North Carolina, Ohio, Pennsylvania, South Carolina, Texas, Virginia, West Virginia	The fund’s Social Impact Advisory Board provides input related to the social and environmental impacts of proposed investments by using metrics that align with goals of CRA and the “Opportunity Zones Reporting Framework” developed by a partnership of the U.S. Impact Investing Alliance, the Beek Center on Social Impact and Innovation at Georgetown University, and the Federal Reserve Bank of New York.

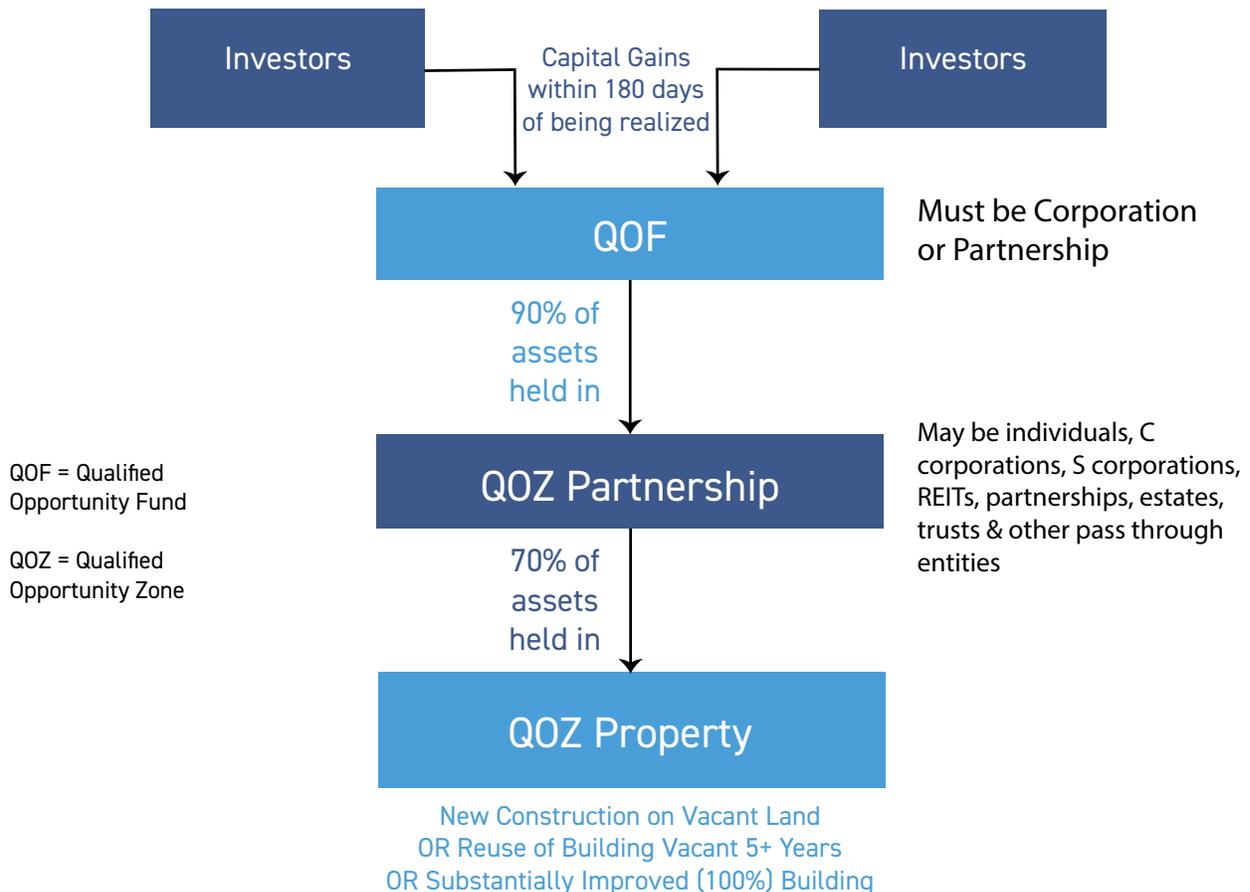
DEVELOPMENT STRATEGY

Local QOF Formation

As an alternative to pitching Steubenville projects to established QOFs that are unlikely to have a geographic tie to the region, a high-wealth individual or group of local or regional investors could pool their capital gains to form their own QOF focused on projects in Steubenville and similar Appalachian communities where they have a personal interest and commitment.

A separate Opportunity Zone Investor Education session was held as part of the project with a summary presentation providing an overview of how this federal tool can be potentially leveraged in Steubenville. The flowchart below shows a sample of how a real estate project could be structured.

BASIC OPPORTUNITY ZONE INVESTMENT FLOWCHART: RENTAL REAL ESTATE PROJECT



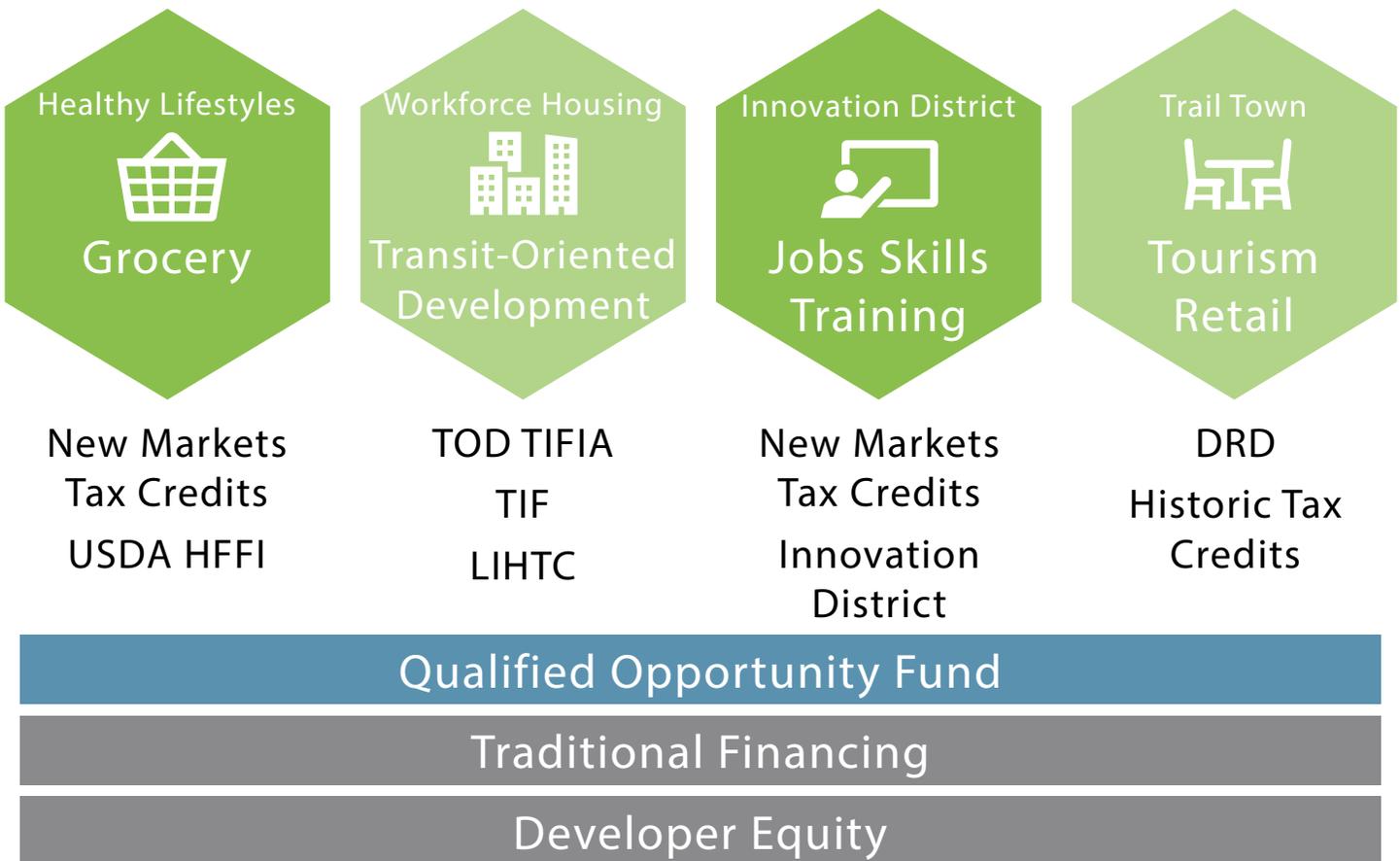
DEVELOPMENT STRATEGY

Other Complementary Tools

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Several relevant options are summarized by project theme below with the most relevant tools to the South End District being detailed on the next page.

FINANCIAL INCENTIVES TOOLKIT



DEVELOPMENT STRATEGY

Funding Tool/Program	Potential Application
Port Authority Site Assembly & Financing	Jefferson County Port Authority has broad powers under Ohio Revised Code Section 4582 gives port authorities a wide range of powers to facilitate site assembly, infrastructure development, and project financing through bonds and lease structures.
Tax Increment Financing (TIF)	The land value capture of future improvements to real property through a TIF district is a logical source of funding for catalytic infrastructure such as the proposed gateway intersection reconfiguration, especially in a municipality that is fiscally <i>constrained</i> .
Downtown Redevelopment District (DRD) & Innovation District	A 10-acre maximum DRD(s) could be formed around one or more building on the National Register of Historic Places to allow for TIF-like mechanism that provides additional flexibility to use DRD proceeds for not only public infrastructure but also for historic building rehabilitation loans or grants, non-historic building rehabilitation loans, and marketing and promotion of the district. If 100 Gbps upload/download broadband speeds are provided in the DRD, it can also be designated as an Innovation District that can provide loans/grants to tech-related businesses and business incubators/accelerators.
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Development Process

The next page summarizes the parallel development tracts that will need to be advanced to leverage transformation public-private investment in the Steubenville South End District Opportunity Zone. While the Jefferson County Port Authority will need to champion this effort, municipal, county, MPO, and OMEGA support will be critical to implementing the vision for a revitalized South End District.

DEVELOPMENT STRATEGY

DEVELOPMENT PROCESS FLOWCHART

