

Sender's Name John DeSteno Phone 304 293-7876  
Company WV Bureau of Business & Economic Research  
Address PO Box 6025 Dept./Floor/Suite/Room  
City Morgantown State WV ZIP 26505

Technical Proposal

## Economic Impact of Historic Preservation Activities in West Virginia

A Research Proposal to the  
West Virginia Division of Culture and History, State Historic Preservation Office  
Solicitation No. DCH14085

Submitted by  
Bureau of Business & Economic Research  
College of Business & Economics  
West Virginia University

July 18, 2014

07/22/14 09:52:10AM  
West Virginia Purchasing Division

## **1. Overview**

Because residents of West Virginia value expressions of their cultural heritage, the preservation of structures and communities of historic significance is an articulated State value. While such efforts may be personal and private, or initiated by corporations or foundations, the focus of this study is the economic impact of two particular State programs.

We propose to assess the economic impact of two programs that are provided by the West Virginia Division of Culture & History: a) the historic preservation tax credit that is provided by the West Virginia and US governments and b) the West Virginia Development Grant Program, part of the West Virginia Historic Preservation Grant Program. We will exploit two methodologies to provide these assessments. First, we will utilize economic impact analysis to quantify the effects of these programs on economic outcomes such as employment, business sales, employee compensation, and select tax revenues in West Virginia. Second, we will conduct a series of case studies from urban and regional areas to provide further illustration of the effect of the historic preservation programs. Finally, the project will provide a tool for measuring direct economic impacts that the Division of Culture and History can use to update results annually.

### **1.1 Qualifications**

#### **1.1.1 Project Team**

This proposal represents a collaborative effort of the West Virginia University Bureau of Business & Economic Research (BBER), the Marshall University Center for Business and Economic Research (CBER), and the University of Cincinnati Economics Center, each of which brings unique capabilities to the Project Team. The Project Team is led by BBER.

**West Virginia University** Since the 1940s, the mission of the BBER has been to serve the people of West Virginia by providing the State's business and policymaking communities with reliable data and rigorous applied economic research and analysis that enables the State's leaders to design better business practices and public policies. BBER research is disseminated through policy reports and briefs, through large public forums and through traditional academic outlets. BBER researchers are widely quoted for their insightful research in state and regional news media. The BBER's research and education/outreach efforts to public- and private-sector leaders are typically sponsored by various government and private-sector organizations.

The BBER has research expertise in the areas of public policy, health economics, energy economics, economic development, economic impact analysis, economic forecasting, tourism and leisure economics, and education policy, among others. The BBER has a full-time staff of three PhD economists, two master's-level economists, and one bachelor's-level economist. This staff is augmented by graduate student research assistants. The BBER also collaborates frequently with affiliated faculty from within the College of Business and Economics as well as from other parts of WVU.

**Marshall University** CBER was established in 1994 to enhance regional economic development endeavors. CBER began by providing services to and support for the business community through leveraging expertise within the Lewis College of Business. In 1998, CBER merged with the Applied Research Division at Marshall University, adding additional researchers and expertise. CBER left the College of Business in 2004, becoming a subsidiary of part of the Marshall University Research Corporation (MURC), a 501(C)(3) organization established by Marshall University to administer externally funded projects. In 2011, CBER became part of the Nick J. Rahall, II Appalachian Transportation Institute (RTI). Over its two decades of service, CBER has grown from a small center with only two full-time staff members to include a staff of 12 researchers and associates.

CBER provides economic, policy and financial research, data analysis and other related services to its clients. Clientele include state and local governments, nonprofit organizations, trade associations and private firms in the State of West Virginia and the surrounding region. All research efforts undertaken at CBER are conducted with a strong and deliberate objective to remain a nonpartisan organization dedicated to being a resource for information. CBER focuses on the quality and integrity of its research products without taking an advocacy position within larger contextual debates.

**University of Cincinnati** For 25 years, the Economics Center at the University of Cincinnati has been providing valuable insights through high quality economic analyses to equip leaders in making sound decisions for their business, organization or community. Our commitment to improving the community is integral to our research and is consistent with the educational mission of the Economics Center. We believe that by educating our citizens to understand economic concepts and financial topics, we are building a stronger community for the future.

The Research and Consulting Division of the Economics Center provides the knowledge building blocks that help clients make better finance, policy and economic development decisions. Our custom approach and critical data analysis empower business and civic leaders to respond to changing economic conditions, strengthen local economies and improve the quality of life for their communities. Every year, the Economics Center works on community and economic development, economic impact, modeling and forecasting projects for dozens of clients.

### 1.1.2 Relevant Experience

#### **Economic Impact of West Virginia Higher Education Institutions (WVU, 2010)**

This study computed the economic impact of higher education institutions in West Virginia, which includes the economic impact of 10 public four-year academic institutions and the West Virginia Higher Education Policy Commission. The impacts were computed based on these institutions' annual operating purchases for the 2008 fiscal year and their annualized capital expenditures. The study found that these institutions generated approximately \$7.9 billion of business sales, which includes \$1.5 billion of employee compensation, and \$73 millions of assorted state taxes. These impacts generate approximately 40,600 jobs in the state.

### **Economic and Community Impacts of the Revitalized Music Hall (UC, 2012)**

Music Hall is one of Cincinnati's greatest cultural treasures. Located in the historic neighborhood of Over-the-Rhine, Music Hall is home for many local performing arts groups. Built in 1878, Music Hall, which is on the National Trust's list of endangered places, has suffered from years of degradation to its infrastructure.

The Economics Center first examined the economic impacts resulting from the \$150 million renovation as well as from annual operations of Music Hall post-renovation activities. Additionally, the study described the impact of Music Hall as an anchor for an urban arts and culture axis, as well as its role in encouraging additional investment in redevelopment of the surrounding Over-the-Rhine neighborhood.

### **Deerfield Township TIF Revenue Forecast Model (UC, 2009)**

About 20 percent of the commercial property in Warren County is located in one of Deerfield Township's Tax Increment Financing (TIF) districts. To gain a better understanding of the outlook for this revenue stream, the Township asked the Economics Center to analyze a range of economic data and develop a simple spreadsheet model for projecting future property values and the consequent revenues from the Township's TIF districts.

In addition to the model, the Township received a four-page model user's guide and a training session. According to the Township's Fiscal Officer, "The TIF Model is intuitive, easy and flexible for reporting to the Township Trustees to help them understand the resources that Deerfield Township may have available."

**Quality of Life, Quality of Living: Economic & Community Benefits of Cincinnati Museum Center at Union Terminal (UC, 2014)** In this and other recent studies, the client asked that the analysis be complemented by a "deeper dive" into particular programs through the use of field research and interviews. These approaches provided a more in-depth analysis beyond typical economic impact data inputs. The results have proven beneficial in client efforts to "tell the story" of their impact and to generate support for efforts to restore Union Terminal, which is a national historic landmark and one of the top 50 architecturally significant buildings in the US according to an AIA survey.

### **Economic Impacts and Valuation Associated with the Construction and Operation of New and Renovated Kanawha County Public Library Facilities (CBER 2011)**

The Kanawha County Public Library (KCPL) and its various branches and services have expanded in recent years. In response to elevated demand, the KCPL aspires to enhance its library facilities and provision of services. The purpose of this analysis was to assess and establish the value of library services and the impact of upgraded facilities on the community.

CBER examined the benefit of services offered by the KCPL, analyzed planned expansion projects, explored user perceptions of contributions to county prosperity and quality of life and performed a social impact analysis. The benefit of KCPL services were estimated to exceed \$14 million and to provide a return of approximately \$2.24 for every dollar invested. Ultimately, it

was concluded that the KCPL contributes significantly to the quality of life in and the economic well-being of Kanawha County residents.

### **Economic Impact Study of the Clay Center for the Arts and Sciences of West Virginia (CBER 2011)**

West Virginia's Clay Center for the Arts and Sciences boasts a large selection of primarily youth-focused programs and facilities and houses the West Virginia Symphony Orchestra (WVSO). The Clay Center is also a major business enterprise with a substantial economic impact. The Marshall University Center for Business and Economic Research (CBER) explored such impacts including output added to the State economy, personal income for West Virginia residents and total positions sustained. CBER also examined attendee information, total volunteer hours and aspects of community enthusiasm including contributions and memberships.

The results of the study concluded that Clay Center and the WVSO contribute more than \$16 million to the State and local economies annually. These entities provide a valuable and unique art, science and cultural amenity consistent with West Virginia's economic development needs. Such benefits serve to enrich the lives of West Virginians and regional visitors.

## **2. Project Tasks**

### **2.1. Task 1: Economic Impact Analysis of State and Federal Historic Rehabilitation Tax Credits**

The West Virginia and Federal Rehabilitation Investment Tax Credit Program offers a 20 percent income tax credit to eligible owners for the rehabilitation of historic private residences listed in the National Register of Historic Places. The beneficiaries may continue to receive the credit for up to five years. The economic impacts these rehabilitation projects generate are likely at least partially attributable to the tax credit program, without which owners may not have enough incentives to invest in the projects. By the same token, rehabilitation projects not participating in the tax credit program are outside the scope of this study.

This study will use the IMPLAN<sup>®</sup> input-output modeling system to calculate the direct, indirect and induced, and total economic impacts of the rehabilitation projects that received tax credits during the last 10 years. This input-output model estimates the impacts by tracing the recirculation of funds in the West Virginia economy. A purchase from the initial supplier causes that supplier to hire employees and purchase from its suppliers, who in turn have their own suppliers and employees, and so on. Estimated impacts include business sales, employment, and taxes.

The West Virginia State Historic Preservation Office (WVSHPO) will provide the data required to compute the economic impact. More specifically, this study requires data on the total dollar amount of projects, with as much detail on expenditures across specific categories, such as employee compensation or construction materials, as possible. Data on the number of workers, if available, will enable this study to compute the employment impact more accurately. If such data is not available this study will utilize other information to estimate the employment numbers.

## **2.2. Task 2: Economic Impact Analysis of the State Development Program**

The WVSHPO administers two grant programs: (1) Survey and Planning Grants and (2) State of West Virginia Development Grants. This study, however, focuses only on examining the impact of the state grant development program. This program offers matching grants for construction projects involving buildings listed in the National Register of Historic Places. At least 50 percent of the total cost of the project must be provided by the beneficiaries or third parties. Similarly, the economic impacts generated by these projects are attributable to the development grant program, without which the beneficiaries may not have enough incentives to invest.

To compute the direct, indirect and induced, and total economic impact of this program during the last 10 years, this study requires data on the total dollar amount of the projects broken down at least by major expenditure items such as employee compensation and construction materials, as well as data on the number of workers employed in the projects, if available. The WVSHPO will provide these data.

## **2.3. Task 3: Piggy-back Effect Analysis of the Tax Credit Program**

Given limited resources, the State government aims to allocate tax revenues for the most efficient investments. By providing the tax credit for historic preservation projects the State loses tax revenues that would have been available to fund other development projects. The question is do the historic preservation projects supported by the tax credit program generate more significant impact than if the same amount of tax revenues is allocated for other development projects. This question represents the piggy-back effect of the tax credit program.

This study computes the piggy-back impact of the tax credit program by comparing the magnitude of the economic impact generated by projects supported by the tax credit program to that generated by other development projects. The results will depend on which other development projects will be used for comparison. In theory, resources, in this case tax revenues, are always used for the most efficient projects. In practice, however, the allocation of tax revenues is regulated. This study will examine possible scenarios of how the tax revenues, that would have been collected if the tax credit program were not offered, would be allocated.

## **2.4. Task 4. Development of Model and Methodology for Annual Updates**

Concurrent with assessing the data available from the WV SHPO the study team will develop a replicable data collection instrument, such as a survey, to measure the direct effects of the tax credit and development grant programs (alone and in tandem) to develop model(s) for the WVSHPO. This instrument will allow WVSHPO to make annual updates to estimations of direct effects made during the contract period. The study team will coordinate with the WVSHPO to produce a spreadsheet or database tool (dependent upon preference) that meets the needs of the office while maintaining as high a level of user-friendly application as possible.

The survey instruments will be designed to collect information from tax credit and development grant program participants that may be implemented across multiple platforms and collect information

within a functional format. Data collected through the survey instruments can then be combined with data from publicly available sources to produce annual updates on direct impacts. The study team will provide to the WVSHPO all necessary documentation regarding the instruments produced as well as instruction in their application.

### **2.5. Task 5: Case Studies**

This study will provide a minimum of four case studies chosen to most fully represent the range of historic preservation activities that involve State and federal historic rehabilitation tax credits and State development grant programs. The purpose of the case studies is to create a more compelling story of how these initiatives impact the State. The WVSHPO will provide ten project files, from which a set of case studies will be selected – with the objective of representing as fully as possible the project mix, in terms of urban and rural locations, tax and grant projects, historic districts and individual properties, and residential and commercial uses. The case studies portion of the report will be approached as a way in which to complement the economic impact tasks by interviewing people involved with these projects in the state to illustrate ways in which the ripple effects discussed in the preceding sections of the study really do occur. Additionally, a literature review will approach the value of heritage preserved, such as through the discussion of topics such as contrasting home values inside and outside of historic districts that have similar existing conditions, but differ in value.

### 3. Project Timeline

Task	Month # 1	Month # 2	Month # 3	Month # 4	Month # 5	Month # 6	Month # 7	Month # 8	Month # 9	Month # 10
<b>Project Management</b>										
Kick-off meeting with WVSHPO	■									
Monthly progress reports			■		■		■		■	
<b>Task 1. Economic Impact Analysis of State and Federal Historic Rehabilitation Tax Credits</b>										
Collect, organize, and assemble data	■	■	■							
Conduct economic impact analysis			■	■	■	■				
Prepare Task 1 report						■	■			
<b>Task 2. Economic Impact Analysis of the State Development Program</b>										
Collect, organize, and assemble data	■	■	■							
Conduct economic impact analysis			■	■	■	■				
Prepare Task 2 report						■	■			
<b>Task 3. Piggy-back Effect Analysis of the Tax Credit Program</b>										
Develop a model for piggy-back effect analysis						■	■			
Conduct piggy-back effect analysis							■	■	■	
Prepare Task 3 report									■	■
<b>Task 4. Development of Model and Methodology for Annual Updates</b>										
Develop a general model for updates				■	■	■	■			
Incorporate results of Task 1 into the model						■	■	■		
Write instructions on how to conduct an update							■	■	■	
Provide training to WV SHPO staff									■	
<b>Task 5. Case Studies</b>										
Identify cases	■	■	■							
Collect data through interview/survey			■	■	■	■	■			
Create case study summaries						■	■	■		
Prepare/revise case study report							■	■	■	
<b>Report and Presentation</b>										
Integrate reports -> submit as a draft									■	■
Present study results										■
Prepare final report incorporating feedbacks										■



#### 4. Key Personnel

**John Deskins, Ph.D.** serves as Director of the Bureau of Business and Economic Research (BBER) and Associate Professor of Economics at West Virginia University. He received his Ph.D. in Economics in 2005 from the University of Tennessee. Deskins' research has focused on U.S. state economic development, small business economics, and government tax and expenditure policy, primarily at the U.S. state level. Recent research topics have examined the relationship between state tax policy and entrepreneurial activity, the role of education spending in state economic growth, the extent to which tax planning activity has eroded state tax bases, and the degree to which small businesses can enhance state economic growth. His work has appeared in outlets such as *Public Finance Review*, *Economic Development Quarterly*, *Small Business Economics*, *Public Budgeting and Finance*, *Regional Studies*, *Annals of Regional Science*, *Tax Notes*, and *State Tax Notes*. His work has also appeared in the books *Taxing Corporate Income in the 21st Century*, published by Cambridge University Press, and *What Role for Property Taxes?*, published by the Lincoln Institute of Land Policy.

**Christiadi Ph.D.** serves as Research Associate Demographer for the Bureau of Business and Economic Research (BBER). He received his Ph.D. in Economics in 2005 from West Virginia University (WVU). His research interests include urban-regional and labor-demographic economics, with a primary focus on migration. His work has appeared in *Journal of Regional Science* and *Papers in Regional Science*. Christiadi joined the BBER in 2009. He serves as the BBER and West Virginia representative for the FSCPE program. He is responsible for the annual production of the West Virginia Population Projections for the state's 55 counties and conducting studies analyzing how West Virginia demographic patterns and trends may affect the state economy as a whole. Christiadi is also in charge of the development and maintenance of the BBER demographics website dedicated to providing one-stop access to demographic and socioeconomic data concerning West Virginia and its regions. He has also conducted a variety of economic impact and labor market studies. His recent projects include a supply-demand analysis of West Virginia post-secondary graduates and the economic impact of WVU football.

**Jeff Rexhausen, MSP** is Senior Research Associate for the Economics Center. He is an economist and planner who has spent thirty years working with leaders from the public, private, and non-profit sectors to design and implement projects in response to diverse community issues. This experience has involved state, regional, local, and private economic development organizations in every region of the nation. Mr. Rexhausen has specialized in developing analysis tools to assist clients in assessing development feasibility and the economic and fiscal impacts of projects and organizations. Prior to taking his position at the Economics Center, Mr. Rexhausen worked in several consulting firms as a vice president of research, project manager, and economic analyst. He has also worked in the public sector at the Northern Kentucky Area Development District and Oak Ridge National Laboratory.

**Megan Ryan, MCP** is a Research Associate for the Economics Center. She is responsible for producing reports and presentations in the research and consulting division while serving as a principle investigator for a variety of projects. Megan has gained practical experience at the Historic Charleston Foundation (Charleston, SC), the Port of Greater Cincinnati Development Authority (Cincinnati, OH), and The Catalytic Development Funding Corporation of Northern Kentucky (Covington, KY). These roles have increased her interests in cultural heritage preservation, urban real estate development, and the many facets of economic development. She earned her Master's Degree in Community Planning with a specialization in economic development from the University

of Cincinnati's College of Design, Art, Architecture, and Planning; and her Bachelor of Science in Psychology with minors in Historic Preservation and Community Planning and Spanish from the College of Charleston in South Carolina.

**Jennifer M. Shand, PhD** Jennifer Shand is the Director of the Center for Business and Economic Research at Marshall University. Her areas of expertise include regional economics, economic development, labor economics and consumer finance and demographics. Prior to joining CBER, Dr. Shand worked at Virginia Tech's Office of Economic Development, where she worked across university departments and with regional and industry partners to address a variety of issues throughout the State. Her background includes working with local communities, non-profits and industry on applied research projects at the Economics Center at the University of Cincinnati. Dr. Shand's projects include building custom forecasting and analytical tools, industry and market analyses and working with consortia of regional and industry stakeholders. Dr. Shand received her Ph.D. in Economics from the Ohio State University in 2008, with specializations in International Economics and Regional Development. Her personal research focuses on the implications of personal debt for various household decisions such as home ownership and starting a family. She received a master's degree in Economics from Miami University of Ohio in 2003 and her bachelor's degree in Economics and International Affairs from James Madison University in 2002.

**Justin Matthews, MBA** Justin Matthews is a Research Associate for the Center for Business and Economic Research at Marshall University in addition to the Nick J. Rahall, II Appalachian Transportation Institute. He has significant experience in public-private partnerships and innovative program delivery methods for highway infrastructure as well as data collection and transportation research. Current and/or recent examples of Mr. Matthews' research include transportation rate studies for land and water commodity movements, economic viability and environmental benefits of a next generation inland vessel, the effects of larger and heavier trucks on infrastructure and the safety ramifications, research for the West Virginia state rail plan, potential economic benefits of public private partnerships on reclaimed mine sites in the construction of the King Coal Highway and participated in the completion of a study on the future of transit in West Virginia. In addition, Justin has assisted in the writing of several grant proposals to Federal and state agencies to support economic development activities. He received his Bachelor of Arts degree in Accounting from Marshall University and holds an MBA as well as a Masters of Science in Industrial Employee Relations from Marshall University.

**Elizabeth Pardue, MBA** Elizabeth Pardue is the Demographic Research Specialist for the Center for Business and Economic Research at Marshall University. Her work for the Center focuses primarily on the fields of education, health and demographic research for clients including West Virginia Head Start, the West Virginia Legislature and other public, private and nonprofit clientele. Since joining the CBER research team in 2007, Ms. Pardue has collected and analyzed economic, demographic and labor force data, and has conducted needs assessments, policy and taxation analyses and economic impact estimations. Ms. Pardue holds a B.B.A in Economics and an M.B.A., both from Marshall University, and a Certificate in Epidemiology and Biostatistics from Drexel University.

## Curriculum Vita John Deskins

### EDUCATION

Ph.D., Economics, University of Tennessee, 2005.

Dissertation: *Essays on the Behavioral Effects of Tax Policy*

Advisor: William Fox

Fields of Specialization: Public Economics and Industrial Organization

B.A. and B.S., *cum laude*, Economics and Management, Emory & Henry College, 2000.

### RESEARCH INTERESTS

Behavioral Effects of Tax Policy, State and Local Government Expenditures,  
Corporate Taxation, Tax Compliance, State/Regional Economic Development,  
Small Business Economics

### EMPLOYMENT

**West Virginia University:** Director, Bureau of Business & Economic Research, 2013 – present;  
Associate Professor of Economics, 2013 – present; Faculty Research Associate, Regional  
Research Institute, 2013 - present.

**Creighton University:** Associate Professor of Economics, 2011 – 2013; Assistant Professor of  
Economics, 2005 – 2011.

**University of Tennessee:** Graduate Research Assistant, Center for Business and Economic  
Research, 2001 – 2005; Graduate Teaching Associate, Summers, 2001 – 2004.

### WORKING PAPERS

3. “What Factors Entice States to Manipulate Corporate Income Tax Apportionment Formulas?” with Brian Hill.
2. “Can State Tax Policies Be Used to Promote Small Business Growth?” with Erin Borchers.
1. “On the Relative Distortions of State Sales and Corporate Income Taxes,” with Donald Bruce and William Fox.

### PUBLICATIONS IN REFERRED JOURNALS

13. Bruce, Donald, John Deskins, and Tami Gurley-Calvez. “Depreciation Rules and Small Business Longevity” *Journal of Entrepreneurship and Public Policy*, Forthcoming.
12. Bruce, Donald, and John Deskins. “Can State Tax Policies Be Used to Promote Entrepreneurial Activity?” *Small Business Economics*, 38(4), 2012.
11. Deskins, John, and Matthew T. Seevers. “Are State Expenditures to Promote Tourism Effective?” *Journal of Travel Research*, 50(2), March 2011.
10. Deskins, John, and Brian Hill. “State Taxes and Economic Activity Revisited: Have Distortions Changed?” *The Annals of Regional Science*, 44(2), April 2010.
9. Deskins, John, and Brian Hill. “Have State Tax Interdependencies Changed Over Time?” *Public Finance Review*, 38(2), March 2010.
8. Deskins, John, Brian Hill, and Laura Ullrich. “Education Spending and State Economic Growth: Are All Dollars Created Equal?” *Economic Development Quarterly*,

- 24(1), February 2010.
7. Wijeweera, Albert, and John Deskins. "Do Recent Data Provide Evidence that the US Trade Deficit Will Correct Itself?" *Applied Economics Letters*, 17(1), 2010.
  6. Deskins, John, Sally Deskins, and Brian Hill. "How Do State Arts Appropriations Affect State Economic Growth?" *The Review of Regional Studies*, 39(3), 2009.
  5. Goss, Ernie, Edward A. Morse, and John Deskins. "Have Casinos Contributed to Rising Bankruptcy Rates?" *International Advances in Economic Research*, 15(4), November 2009.
  4. Alm, James, John Deskins, and Michael McKee. "Do Individuals Comply on Income Not Reported by Their Employer?" *Public Finance Review*, 37(2), March 2009.
  3. Bruce, Donald, John Deskins, Brian Hill, and Jonathan Rork. "(Small) Business Activity and State Growth: Does Size Matter?" *Regional Studies*, 43(2), March 2009.
  2. Bruce, Donald, Deborah A. Carroll, John A. Deskins, and Jonathan C. Rork. "Road to Ruin? A Spatial Analysis of State Highway Spending" *Public Budgeting & Finance*, 27(4), Winter 2007.
  1. Bruce, Donald, John Deskins, and William F. Fox. "Has Internet Access Taxation Affected Internet Use?" *Public Finance Review*, 32(2), March 2004.

#### **BOOK CHAPTERS**

2. Deskins, John, and William F. Fox. "Measuring Behavioral Responses to the Property Tax." In *Challenging the Conventional Wisdom on the Property Tax*, R. Bahl, J. Martinez-Vazquez, and J. Youngman, editors, Lincoln Institute of Land Policy, 2010.
1. Bruce, Donald, John Deskins, and William F. Fox. "On the Extent, Growth, and Efficiency Consequences of State Business Tax Planning." In *Taxing Corporate Income in the 21<sup>st</sup> Century*, A. Auerbach, J. Hines, and J. Slemrod, editors, Cambridge University Press, 2007.

#### **OTHER ACADEMIC PUBLICATIONS**

5. Deskins, John, Tami Gurley-Calvez, and Eric Thompson. "Understanding Small Business Activity at the State Level." Washington, DC: U.S. Small Business Administration, Report Number 392, February 2012.
4. Bruce, Donald, John Deskins, and Tami Gurley-Calvez. "An Investigation of Depreciation Deductions by Small Businesses." *Tax Notes*, August 9, 2010.
3. Bruce, Donald, John Deskins, Brian Hill, and Jonathan Rork. "Small Business and State Growth: An Econometric Investigation." Washington, DC: U.S. Small Business Administration, Report Number 292, February 2007.
2. Bruce, Donald, and John Deskins. "State Tax Policies and Entrepreneurial Activity." Washington, DC: U.S. Small Business Administration, Report Number 284, November 2006.
1. Bruce, Donald, John Deskins, and William F. Fox. "Has Internet Access Taxation Affected Internet Use?" *State Tax Notes*, 32(7), May 17, 2004.

### **CONFERENCE PROCEEDINGS**

3. Deskins, John, Brian Hill, and Mark Tuttle. "How Does State and Local Education Spending Affect State Economic Growth in the Long-Run?" 2010, *Proceedings of the One-Hundred First Annual Conference on Taxation*, National Tax Association.
2. Bruce, Donald, Deborah Carroll, and John Deskins. "The Hand That Rocks the Cradle: How State Economic Development Incentives Affect Local Infrastructure Provision," 2006, *Proceedings of the Ninety-Eighth Annual Conference on Taxation*, National Tax Association.
1. Bruce, Donald, John Deskins, and Mohammad Mohsin. "State Tax Policies and Entrepreneurial Activity: A Panel Data Analysis," 2004, *Proceedings of the Ninety-Sixth Annual Conference on Taxation*, National Tax Association.

### **PUBLISHED RESEARCH REPORTS**

5. "Tennessee Revenue Tracking and Forecasting," with William Fox. Prepared monthly for the Tennessee Department of Revenue, May 2002 – April 2005.
4. "Work Requirements and Welfare: Work or Education First?" with Donald Bruce. Prepared for the Tennessee Department of Human Services. Knoxville, TN: Center for Business and Economic Research, The University of Tennessee, June 2004.
3. "Welfare Policy in Tennessee: Recent Research and Unanswered Questions," with Matthew N. Murray et al. *An Economic Report to the Governor of the State of Tennessee*. Knoxville, TN: Center for Business and Economic Research, The University of Tennessee, January 2004.
2. "Work Requirements for Welfare Recipients in Tennessee," with Donald Bruce and Angela Thacker. Prepared for the Tennessee Department of Human Services. Knoxville, TN: Center for Business and Economic Research, The University of Tennessee, June 2003.
1. "Designing Tennessee's Lottery," with Matthew N. Murray et al. *An Economic Report to the Governor of the State of Tennessee*. Knoxville, TN: Center for Business and Economic Research, The University of Tennessee, February 2003.

### **RESEARCH GRANTS**

5. U.S. Small Business Administration, "What Types of Entrepreneurs Contribute Most to State Economic Growth?" with Tami Gurley-Calvez and Eric Thompson, 2010-2011.
4. U.S. Small Business Administration, "Do Depreciation Rules Influence Small Business Activity?" with Donald Bruce and Tami Gurley-Calvez, 2008-2009.
3. HDR Inc., "The Economic Consequences of Developing the I-80 Corridor in Nebraska," with Ernie Goss and Eric Thompson, 2007.
2. U.S. Small Business Administration, "An Econometric Investigation of the Relationship Between Small Business Activity and Economic Growth Among the States: 1988-2002," with Donald Bruce, Brian Hill, and Jonathan Rork, 2005-2006.
1. U.S. Small Business Administration, "State Tax Policies and Entrepreneurial Activity," with Donald Bruce, 2004-2005.

## Jennifer M. Shand, PhD

### Home Address:

54 Township Rd 1248  
Proctorville, OH 45669

Phone: 513-477-2242

### Employer Address:

907 Third Avenue  
Huntington, WV 25701

Office Phone: 304-528-7219

Email: shandj@njrati.org

### Employment

Director, Center for Business and Economic Research, Marshall University, March 2014 – Present  
Senior Economic Development Specialist, Virginia Tech Office of Economic Development,

August 2012 – March 2014

Research Associate, Economics Center, University of Cincinnati, September 2008 – July 2012

### Education

Ph.D., Economics, The Ohio State University, December 2008

M.A., Economics, The Ohio State University, August 2004

M.A., Economics, Miami University of Ohio, August 2003

B.A., Economics, International Affairs, James Madison University *magna cum laude*, May 2002

### Grants, Fellowships, Awards, and Honors

Travel Grant, National Association of Business Economics Foundation Economic Policy  
Conference Scholarship, March 2012

United Way Worldwide and FINRA Investor Education Foundation: Evaluation of United Way  
of Greater Cincinnati's Financial Education Program for Agency Staff, \$40,000,  
2012-2014

People Working Cooperatively Chairman's Award, 2011

Excellence in Economics Education Research Grant: Evaluation of a Comprehensive High  
School Financial Education Model, \$17,075, 2010-2012

Excellence in Economics Education Research Grant: Evaluation of the Cumulative Effects of the  
Student Enterprise Program, \$10,000, 2011

Excellence in Economics Education Grant with Dr. Valerie Krugh, The Student Enterprise  
Program - An Assessment of the Power of Incentives on Academic Performance,  
\$24,840, 2009-2010

University Fellowship, The Ohio State University, 2003-2004

Outstanding Graduate in Economics, James Madison University, 2002

Summer Undergraduate Research Fellowship, University of Maryland, Baltimore County,  
June 2001-August 2001

### Dissertation

"The Impact of Early-Life Debt on the Post-College Decisions of Young Households:  
An Empirical Investigation of Homeownership, Marriage and Fertility"

Dissertation Supervisor: Lucia Dunn

### Areas of Specialization

Applied Microeconomics, Consumer and Personal Finance, Economic Education, Economic  
Development, Public Policy Analysis, International Economics

## **Publications**

Review of *The Economics of Consumer Credit* in *The Eastern Economic Journal*. (2008) **34** (3). 419-420.

## **Working Papers**

“The Influence of Educational and Personal Debts on Credit Constraints and Homeownership among Young Households” (*in development*)

“Early-Life Debt on the Fertility Decisions of Young Households” (*in development*)

“Can Cutting Sale Tax Rates Increase Spending? Evidence from Ohio” with Benjamin Passty (*in development*)

## **Conference Presentations**

“Data-driven Economic Development: A Virginia Example”, Annual Meeting of the Association of University Business and Economic Research, October 13, 2013

“Defining and Measuring the Economic Impacts of a ‘Green Approach’ to Mitigation of Combined Sewer Overflows”, Annual Meeting of the Association of University Business and Economic Research, October 28, 2012

“Defining and Modeling Community Impacts”, Annual Meeting of the Association of University Business and Economic Research, October 28, 2012

“An Examination of Early-Life Debt on Fertility Decisions of Young Households”, Annual Meeting of the Midwest Economics Association, March 31, 2012

“Evaluation of Cumulative Impacts of the Student Enterprise Program on Academic Achievement”  
Annual Meeting of the American Economic Association, January 6, 2012

“Increasing Property Values and Decreasing Forced Mobility: Analysis of Non-Energy Benefits for Low-Income Programs” Joint research with Jamie Drakos, Cadmus Group, Inc, Annual International Energy Program Evaluation conference, August 16, 2011

“The Impact of Financial Literacy on Mathematics Achievement: An Evaluation of EnterpriseMath” Joint presentation with George Vredeveld, Director, Economics Center, Annual Meeting of the American Economic Association, January 3, 2010

“Integrating Students into the Business of Economics Research”, joint presentation with Benjamin Passty, Director, Applied Economics Research Institute, University of Cincinnati, and Irem Yelkenci, Research Associate, Economics Center, University of Cincinnati, Annual Meeting of the Association of University Business and Economic Research, October 18, 2009

“The Impact of Educational Debt on the Homeownership Rates of Young Households: An Empirical Investigation”, Annual Meeting of Eastern Economic Association, February 23, 2007, Annual Meeting of Midwest Economic Association, March 25, 2007

**Teaching Experience**

Urban Economics and Public Policy	Virginia Tech Spring 2012
Writing in Economics	Ohio State Winter 2008
Writing in Economics	Ohio State Fall 2007
Intermediate Microeconomics	Ohio State Winter 2007
Principles of Microeconomics	Ohio State Fall 2006
Principles of Microeconomics	Ohio State Summer 2006

**Professional Experience**

Adjunct Professor, Virginia Tech Department of Urban Affairs and Planning, January 2013-May 2013  
Intern, JPMorgan Chase, Consumer Risk Modeling and Analytics, June 2007-September 2007  
Graduate Administrative Associate, Department of Economics, The Ohio State University, 2006-2008  
Graduate Research Assistant, Department of Economics, The Ohio State University, 2004-2008  
Graduate Teaching Assistant, Department of Economics, The Ohio State University, 2005-2008  
Graduate Assistant, Department of Economics, Miami University of Ohio, September 2002 – June 2003

**Computer Skills**

SAS, Stata, Microsoft Office, SurveyMonkey, Qualtrics

**Selected Projects**

“The Future of Unmanned Vehicle Systems in Virginia, 2014”, report in collaboration with Virginia Department of Aviation, Virginia Economic Development Partnership, Center for Innovative Technology, and Virginia Tech, Project Contributor, September 2013-December 2013.

“Western Virginia Transportation Equipment Manufacturers Competitiveness Initiative”, funded through U.S. Economic Development Administration, Project Manager, Virginia Tech Office of Economic Development, September 2012-September 2013

“Southern Virginia Polymer Initiative”, Project Manager, Virginia Tech Office of Economic Development, September 2012-June 2013

“Virginia Rural Competitiveness Project”, funded through U.S. Economic Development Administration, Project Team Member, Virginia Tech Office of Economic Development, September 2012-present

“Economic and Community Impacts of Talbert House in Greater Cincinnati: Estimation of the Impacts of Successful Completion of Social Service Rehabilitation and Treatment Programs”, Project Lead, Economics Center, University of Cincinnati, July 2012

“Analysis of Economic and Community Impacts of People Working Cooperatively in Greater Cincinnati for the Evaluation of the 2009 Implementation Year” Economics Center for Cadmus Group Inc., Project Lead, Economics Center, University of Cincinnati, July 2012

“Commercial Property Value Forecast for Deerfield Township”, Project Lead, Economics Center, University of Cincinnati, November 2009

“The Impacts of Cincinnati Museum Center at Union Terminal on Greater Cincinnati”, Project Lead, Economics Center, University of Cincinnati, February 2009



## Justin Matthews

Nick J. Rahall, II Appalachian Transportation Institute and Center for Business and Economic Research,  
Marshall University  
907 Third Avenue  
Huntington, WV 25701

Ph. 304.528.7246 | C. 304.922.1323 | [matthewsj@njrati.org](mailto:matthewsj@njrati.org)

### Research Interests

Experience in transportation economics research, data collection and data analysis for projects, including but not limited to the effects of larger and heavier trucks on roadways, public transit issues, transportation rates, public-private partnerships and innovative program delivery methods for highway infrastructure. Assists with writing, editing and proofreading of academic journal articles and other forms of research. Experience conducting technical reviews of papers developed internally or submitted externally. Significant private sector experience in state, local and property taxation.

### Work Experience

Research Associate, Center for Business and Economic Research	July 2014 - Present
Research Associate, <i>Nick J. Rahall, II Appalachian Transportation Institute</i>	October 2011 – Present
Part-Time Instructor, <i>Huntington Junior College of Business</i>	December 2011 - Present
Research Assistant, <i>Nick J. Rahall, II Appalachian Transportation Institute</i>	July 2010 – October 2011
Sales & Property Tax Analyst, <i>Circuit City Store Support Center</i>	May 2007 – April 2009
Expense Payables Supervisor, <i>Circuit City Store Support Center</i>	May 2006 – May 2007
Advertising Accounting Supervisor, <i>Circuit City Store Support Center</i>	August 2005 – May 2006

### Education

Marshall University	Accounting/Minor in Economics	Bachelors of Arts, 2003
Marshall University	Business Administration	M.B.A., 2005
Marshall University	Industrial Employee Relations	Masters of Science, 2005

### Professional Licenses and Certificates of Training

N/A

### Instruction of Academic Courses/Training

- Introduction to Accounting
- Intermediate Accounting
- Automated Accounting
- Organizational Management
- Business Mathematics

- Principles of Economics

### **Association Memberships**

N/A

### **Publications**

N/A

### **Grants and Contracts**

*WVDOT Workforce Study 2013*, West Virginia Department of Transportation (current)

*West Virginia State Rail Plan*, West Virginia Department of Transportation (current)

*An Analysis of Truck Size and Weight: Phase II – Infrastructure*, The Railway Supply Institute, Inc. (current)

*An Analysis of Truck Size and Weight: Phase I – Safety*, The Railway Supply Institute, Inc. (past)

*The Future of Transit in West Virginia*, West Virginia Department of Transportation, Public Transit Administration (past)

*Economic Viability and Environmental Benefit Study of the Next Generation Inland Navigation Vessel*, Work-Cat Engineering (past)

*GLMIRS Study Commercial Navigation Transportation Rate*, Huntington District of the United States Army Corps of Engineers (past)

*LRD Waterways Transportation Rates Research*, Huntington District of the United States Army Corps of Engineers (past)

*Potential Economic Benefits of Public Private Partnerships on Reclaimed Mine Sites in the Construction of the King Coal Highway*, West Virginia Department of Transportation (past)

*M-55 Illinois-Gulf Marine Highway Initiative*, RNO Group, LLC, Missouri Department of Transportation (past)

*Comprehensive Rate Dataset Project*, Huntington District of the United States Army Corps of Engineers (past)

## ELIZABETH PARDUE

Center for Business and Economic Research | 907 3<sup>rd</sup> Ave Suite 240 | Huntington, WV 25701  
p 304.528.7222 | f 304.522.0024 | c 304.972.6533 | [pardue@marshall.edu](mailto:pardue@marshall.edu) | [pardue@cbermu.org](mailto:pardue@cbermu.org)

### EDUCATION

Drexel University, Philadelphia, PA  
**Certificate in Epidemiology and Biostatistics** 2013  
GPA: 3.78, Magna Cum Laude

Marshall University Graduate College, Huntington, WV  
**Master of Business Administration** 2010  
GPA: 3.91, Summa Cum Laude

Marshall University, Huntington, WV  
**Bachelor of Business Administration: Economics** 2008  
Minors: Mathematics and International Affairs  
GPA: 3.56, Cum Laude

### RELATED EXPERIENCE

Center for Business and Economic Research, Marshall University, Huntington, WV  
**Demographic Research Specialist** Aug. 2013 – Present  
Present  
Serve as principal investigator, lead analyst and writer on economic research projects, particularly those related to the fields of education, health, demographic, workforce and economic impact analysis. Manage CBER Support Staff and supervise in the collection and analysis of pertinent data for research projects. Serve as reviewer of report narrative and project materials as needed.

Center for Business and Economic Research, Marshall University, Huntington, WV  
**Research Associate** Jul. 2010 – Aug. 2013  
2013  
Compiled reports for and presented results to the West Virginia Legislature and private businesses. Developed and conducted economic impact models with the assistance and supervision of senior researchers. Gathered, compiled and analyzed demographic data as a workforce baseline estimation to measure future economic development. Correlated wind speed data to determine the statistical relationship between wind measurement devices. Managed CBER Support Staff.

Center for Business and Economic Research, Marshall University, Huntington, WV  
**Research Assistant** Nov. 2008 – Jul. 2010  
2010  
Provided data, analysis and reports to the West Virginia Legislature and private businesses. Interpreted tax laws in West Virginia and other states and reported on taxation procedures.

Center for Business and Economic Research, Marshall University, Huntington, WV  
**Undergraduate Research Assistant** May 2007 – Oct. 2008  
2008  
Assisted professional researchers in collecting educational, energy and policy-related data. Produced literature reviews for articles pertaining to research topics. Summarized West Virginia early childhood education legislation for content.

### PUBLICATIONS AND PAPERS

*“Wayne County Community Learning Centers Program Evaluation: 2013 Data Analysis Report”*  
Co-author. Prepared for Playmates Preschools and Child Development Centers, Inc. 2014

*“The Economic Impact of the West Virginia Pumpkin Park”*  
Co-author. Prepared for the West Virginia Pumpkin Park. 2014

*“2013 West Virginia Head Start State Collaboration Needs Assessment Report”*

Co-author (as Elizabeth Eastham). Prepared for the West Virginia Head Start State Collaboration Office.	2013
<i>"State and Local Taxes in West Virginia: Do We Pay Too Much?"</i> Co-author (as Elizabeth Eastham). White Paper.	2013
<i>"Economic Impact of Business Development on Post-Mined Lands in West Virginia"</i> Co-author (as Elizabeth Eastham). Prepared for the West Virginia Division of Energy Office of Coalfield Community Development.	2013
<i>"Economic Impact of the Big Sandy Superstore Arena"</i> Co-author (as Elizabeth Eastham). Prepared for the Big Sandy Superstore Arena.	2013
<i>"Renewable Energy Policy: Opportunities for West Virginia"</i> Co-author. Prepared for the West Virginia Division of Energy.	2012
<i>"Clay County Housing Needs: Data Analysis"</i> Co-author (as Elizabeth Eastham). Prepared for the Capital Resource Agency.	2012
<i>"Geothermal Energy: The Economics of West Virginia's EGS Potential"</i> Co-author (as Elizabeth Eastham). Prepared for the West Virginia Division of Energy.	2012
<i>"Workforce Evaluation of West Virginia's 3<sup>rd</sup> Congressional District: Baseline Characteristics Report"</i> Co-author (as Elizabeth Eastham). Prepared for the West Virginia University Center Economic Development Authority.	2012
<i>"Taxation of Natural Gas: A Comparative Analysis, Severance Tax Review"</i> Co-author (as Elizabeth Eastham). Prepared for the Interim Committee on Finance of the West Virginia Legislature.	2011
<i>"Economic Impacts of Labor Supply in Construction of a Gas Processing Plant in Marshall County, West Virginia"</i> Co-author (as Elizabeth Eastham). Prepared for Affiliated Construction Trades.	2011
<i>"Taxation of Natural Gas: A Comparative Analysis, Taxes Collected Follow-Up"</i> Co-author (as Elizabeth Eastham). Prepared for the Interim Committee on Finance of the West Virginia Legislature.	2011
<i>"Taxation of Natural Gas: A Comparative Analysis"</i> Co-author (as Elizabeth Eastham). Prepared for the Interim Committee on Finance of the West Virginia Legislature.	2011
<i>"Correlation of SODAR and Meteorological Tower Measurements"</i> Co-author (as Elizabeth Eastham). Prepared for the West Virginia Division of Energy.	2011
<i>"Right from the Start (RFTS) Program Evaluation"</i> Co-author (as Elizabeth Eastham). Prepared for the West Virginia Department of Health and Human Resources Division of Perinatal and Women's Health and the Office of Maternal, Child and Family Health.	2011
<i>"Property Tax Exemption of Nonprofit Organizations in West Virginia: Survey Results"</i> Co-author (as Elizabeth Eastham). Prepared for the Sub-Committee on Local Finance and Property Taxation of the Governor's Tax Modernization Project.	2011
<i>"Taxation of Coal: A Comparative Analysis"</i> Co-author (as Elizabeth Eastham). Prepared for the Interim Committee on Finance of the West Virginia Legislature.	2010
<i>"Coal Taxation in West Virginia"</i> Co-author (as Elizabeth Eastham). Prepared for the Interim Committee on Finance of the West Virginia Legislature.	2010
<i>"Comparison of State Policies for Access and Funding of Early Childhood Education Programs"</i> (as Elizabeth Eastham). Prepared for Dr. Calvin Kent, Marshall University.	2010
<i>"The West Virginia Coal Economy 2008"</i>	

Co-author. Prepared for the West Virginia Coal Association.	2010
<i>"Changes in Property Tax Revenue and Exemptions 1999 to 2007"</i> Co-author. Prepared for the Interim Education Sub-Committee C of the West Virginia Legislature.	2008
<i>"International Opportunities within the West Virginia Pre-K Model"</i> Co-author. Prepared for the <i>Global Education Journal</i> .	2008
<i>"Alternative Methods of Providing Adequate Resources to Meet the Early Child Care and Educational Needs of West Virginia's Children Literature Review"</i> Co-author. Prepared for the West Virginia Department of Health and Human Resources.	2008
<i>"The Effect of Pre-K on Grade Repetition West Virginia"</i> Prepared for Dr. Jacqueline Agesa, Marshall University.	2008

**PRESENTATIONS**

<i>"Inquiry Leading to Implementation: West Virginia PK-12 Education Policy"</i> Presented at the 2013 AUBER Fall Conference, <i>Richmond, VA</i> .	2013
<i>"Economic Impact of the Big Sandy Superstore Arena"</i> Presented to Mayor Steve Williams, City of Huntington, <i>Huntington, WV</i> . Presented to the Cabell-Huntington Convention and Visitor's Bureau, <i>Huntington, WV</i> . Presented to the Rotary Club of Huntington, <i>Huntington, WV</i> .	2013
<i>"Taxation of Natural Gas: A Comparative Analysis, Taxes Collected Follow-Up"</i> Presented to the Interim Committee on Finance, <i>Charleston, WV</i> .	2011
<i>"Taxation of Natural Gas: A Comparative Analysis"</i> Presented to the Interim Committee on Finance, <i>Charleston, WV</i> .	2011
<i>"Taxation of Coal: A Comparative Analysis"</i> Presented to the Interim Committee on Finance, <i>Charleston, WV</i> .	2010
<i>"Coal Taxation in West Virginia"</i> Presented to the Interim Committee on Finance, <i>Charleston, WV</i> .	2010

**LANGUAGES**

English—native language

**MEMBERSHIPS**

National Society of Collegiate Scholars, Marshall University

The Women's Club of Huntington Junior Department

Club Secretary: 2013-2014

Club Treasurer: 2014-present

**CHRISTIADI**

Phone: 304-293-1801 (office); Fax: 304-293-7061

E-mail: [Christiadi@mail.wvu.edu](mailto:Christiadi@mail.wvu.edu)

**EDUCATION**

- Ph.D. Economics, West Virginia University  
Fields: Regional-Urban Economics and International Economics
- M.A. Economics, University of Colorado at Denver  
Fields: Labor Economics and Money and Banking
- B.A. Agribusiness, Bogor Agricultural University, Indonesia

**RESEARCH INTERESTS**

Labor-Demographic Economics and Urban-Regional Economics

**WORK EXPERIENCE**

- 10/11 – present Adjunct Faculty, Macroeconomics, E-MBA Online, West Virginia University
- 06/09 – present Demographer, Bureau of Business and Economic Research, West Virginia University
- 06/05 – 07/06 & Regional Economic Analyst, Business Forecasting Center, University of the Pacific,  
06/07 – 04/09 Stockton, California
- 08/06 – 05/07 Visiting Assistant Professor, University of the Pacific, Stockton, California
- 07/02 – 05/05 Economist, Bureau of Business and Economic Research, West Virginia University
- 08/04 – 12/04 Instructor, Principles of Microeconomics, Department of Economics, West Virginia University
- 08/99 – 06/02 Graduate Research Assistant, Regional Research Institute, West Virginia University
- 08/98 – 07/99 Graduate Research Assistant, Bureau of Business and Economic Research, West Virginia University
- 01/97 – 05/97 Teaching Assistant, Macroeconomics, University of Colorado at Denver
- 09/92 – 01/95 Young Researcher, *Insan Hatawasana Sejahtera*, a socioeconomic and demographic research institution, Indonesia
- 05/90 – 08/92 Researcher, LP3ES, a Non-Government Organization specializing in conducting action research on poverty, democracy, and community self-propelling growth

development, Jakarta, Indonesia

09/85 – 09/87

Instructor, Introduction to Economics, Bogor Agricultural University, Indonesia

## **PUBLICATIONS**

“The Joint Choice of an Individual’s Occupation and Destination,” with Brian Cushing, the *Journal of Regional Science*, V48, n5, 2008

“Examining Geographic and Occupational Mobility: A Loglinear Modelling Approach,” with Ge Lin, *Papers in Regional Science*, V85, n4, November 2006

“Testing a Method to Estimate County-Level Demand for Educational Attainment,” with Scott Loveridge and Brian Cushing, *Socio-Economic Planning Sciences*, 39, September 2005

## **GRANT AWARDS**

Housing Count Review for the preparation for the upcoming 2010 Census, U.S. Census Bureau, June 2009-March 2010, \$7,538.

San Joaquin County Data Center, Federal grant distributed through San Joaquin Council of Government, Aug 2007-Aug 2008, \$50,000.

## **SELECTED RESEARCH REPORTS**

“West Virginia Occupational Demand and Academic Program Supply Forecasts Through 2020,” 2013.

“The Economic Impact of Felman Production, Inc. on West Virginia Economy, an Update,” 2013, with Tom Witt

“The Economic Impact of One Home WVU Football Game,” October 2012.

“The Economic Impact of Felman Production, Inc. on West Virginia Economy,” 2012, with Tom Witt

“The Extent of Poverty in West Virginia,” December 2011

“The Shrinking of the West Virginia Working Age Population,” September 2011

“West Virginia Population Projection by Age, Sex, and County,” August 2011

“Economic Impact of Casinos in West Virginia,” January 2011, with Amy Higginbotham and Tom Witt

“West Virginia Demographics, Challenges Ahead,” December 2010

“Retaining the Young and Highly Educated Workforce in West Virginia,” July 2010

“Why West Virginia Population is Aging Faster than the Nation,” December 2009

“West Virginia Population Projection by Age, Sex, and County,” September 2009

“Economic Impact of West Virginia Higher Education Institutions FY 2008,” Fall 2009, with Amy Higginbotham, Eric Pennington, and Tom Witt

“The Economic Impact of San Joaquin County Agriculture Sector,” with Jeff Michael, Regional Analyst, September 2008

“Economic Significance of San Joaquin County Out-Commuters & In-Commuters,” Regional Analyst, 2008

“San Joaquin County Working Resident Commute Pattern,” Regional Analyst, October 2007

“Outlook for the Stockton Housing Market,” 2006, with Sean Snaith

“The Economic Impact of the Port of Stockton,” 2006

“The Economic Impact of Non-Profit Organizations in San Joaquin County,” 2006

“A Tale of Two Cities,” with Sean Snaith, 2006

“The Economic Impact of Gypsum Manufacturing,” 2005

## **JEFF REXHAUSEN**

### **PROFESSIONAL EXPERIENCE**

#### **Senior Research Associate, Economics Center, University of Cincinnati**

Has been responsible for the design, direction, and execution of numerous economic research and analysis studies. In the past twelve years, Mr. Rexhausen has provided economic analysis on over 100 projects for dozens of Economics Center clients.

#### **Other Private Sector Professional Experience**

Mr. Rexhausen has previously worked in several consulting firms as a vice president of research and development, project manager, and economic analyst. In these roles, he has:

- Specialized in developing analytic techniques and tools to assist clients in assessing project feasibility.
- Provided economic development assistance to dozens of communities on projects ranging from comparisons of fiscal costs and benefits to market feasibility studies to analyses of economic and demographic trends and issues.

#### **Other Public Sector Professional Experience**

- Served as the Northern Kentucky Area Development District's Development Services Division Coordinator, where he promoted community and economic development, and assisted local governments in obtaining grants for projects such as conversion of an unused school into housing for the elderly.
- Worked as Research Assistant at Oak Ridge National Laboratory on a range of environmental and other impact assessments and other program evaluation projects.

#### **Additional Professional Work**

- Mr. Rexhausen has given presentations at national professional conferences and various regional programs on subjects such as economic development, affordability and financial capability, economic considerations in major infrastructure projects, and balancing economic and environmental considerations.

#### **Education**

- M.S.P., Planning, University of Tennessee, 1981. Received the Graduate School of Planning's Research Award.
- B.A., Urban Sciences, University of Tennessee, 1977. Recognized as a College Scholar.



# MEGAN RYAN

**EDUCATION UNIVERSITY OF CINCINNATI, CINCINNATI, OH**  
**MASTER OF COMMUNITY PLANNING (MCP), SPRING 2013**  
Economic Development Specialization  
**COLLEGE OF CHARLESTON, CHARLESTON, SC**  
**BACHELOR OF SCIENCE (B.S.), PSYCHOLOGY, SPRING 2011**  
Historic Preservation & Community Planning Minor; Spanish Minor

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**PRACTICAL ECONOMICS CENTER, UNIVERSITY OF CINCINNATI, CINCINNATI, OH**

**EXPERIENCE** Research Associate (April 2013-present)

Graduate Assistant (January 2013-April 2013)

Performs data analysis and maintains client relations as the principal investigator for projects in the research and consulting division; produces reports and presentations that inform private, public, and non-profit clients' finance, policy, and economic development decisions; typical types of reports include: demographic and market analysis (workforce and industry concentration identification), and feasibility studies

**CATALYTIC DEVELOPMENT FUNDING CORPORATION OF NKY, COVINGTON, KY**

Analytic Intern (October 2012-April 2013)

Examined developer tools and funding sources for the Director of Finance to develop a resource guide that markets the area's assets in order to recruit qualified developers; performed an urban housing stock inventory to identify development opportunities in Covington, Kentucky; provided administration support for dynamic not-for-profit

**PORT OF GREATER CINCINNATI DEVELOPMENT AUTHORITY, CINCINNATI, OH**

Transportation & Logistics Intern (Summer 2012)

Implemented an exhaustive audit of river terminals, real estate, and commodity flow along the Ohio River in order to identify the transportation assets in the Cincinnati region, and to pinpoint industrial redevelopment opportunities within the Port Authority's jurisdiction

**HISTORIC CHARLESTON FOUNDATION, CHARLESTON, SC**

Volunteer Coordinator (December 2010-May 2011)

Coordinated and supervised volunteer trainings, lectures, assignments, and appreciation events for the Foundation's 750 volunteers for 2 fundraising events: the Annual Festival of Houses and Gardens and the Charleston International Antiques Show responsible for funding the Foundation's preservation mission Easements and Technical Outreach Intern (August 2010-December 2010)

Processed request for alteration forms for repairs or alterations to easement and covenant properties; performed annual inspections of easement and covenant properties

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**INSTITUTIONAL Graduate Capstone Project: Retrofitting Suburbia, the Village of**  
**EXPERIENCE Morrow, OH**

Member of the Main Street Revitalization Division (Spring 2013)

**Plan Making Workshop: City of Bellevue, KY 2013  
Comprehensive Plan Update**

Focus: Leader of the Community and Economy Division (Fall 2012)

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SKILLS Microsoft Office Suite expert; SalesForce proficient

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AFFILIATIONS Urban Land Institute, Cincinnati (Young Leader Group Committee Member and Mission Advancement Committee Member)  
UC Real Estate Roundtable and Alpha Rho Epsilon Real Estate Fraternity (Secretary)  
Planning Graduate Student Association (Member) & American Planning Association (Student Member)

**CERTIFICATION AND SIGNATURE PAGE**

By signing below, I certify that I have reviewed this Solicitation in its entirety, understand the requirements, terms and conditions, and other information contained herein; that I am submitting this bid or proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.

WVU, Bureau of Business + Econ. Rsch.  
(Company)

John Deskins  
(Authorized Signature)

John Deskins, Director  
(Representative Name, Title)

304-293-7876, 304-293-7061  
(Phone Number) (Fax Number)

7-18-2014  
(Date)

## EXHIBIT A

PRICING PAGES FOR DCH14085		
ITEM #	DESCRIPTION	BID PRICE
1	Analysis of Tax Credit Program	\$6,000
2	Analysis of State Development Grant Program	\$6,000
3	Analysis of Piggy Back Effect	\$5,000
4	Econometric Model and Methodology	\$7,000
5	Final Report	\$10,000
6	Non-technical Report	\$2,000
7	Public Presentation	\$3,000
TOTAL COST		\$39,000

\*\*\*Award will be made to the lowest overall total cost meeting all specifications

VENDOR NAME: WVU, Bureau of Business + Econ. Research  
 ADDRESS: PO Box 6025, Morgantown, WV 26505

FAX #: 304-293-7061

PHONE #: 304-293-7876

E-MAIL ADDRESS: john.deskins@mail.wvu.edu

REMIT TO ADDRESS: same as above

SIGNATURE: John Deskins

DATE: 7-18-2014

RFQ No. DCH14085

STATE OF WEST VIRGINIA  
Purchasing Division

**PURCHASING AFFIDAVIT**

**MANDATE:** Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

**EXCEPTION:** The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

**DEFINITIONS:**

**"Debt"** means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

**"Employer default"** means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

**"Related party"** means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

**AFFIRMATION:** By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

**WITNESS THE FOLLOWING SIGNATURE:**

Vendor's Name: WVU Bureau of Business & Economic Research

Authorized Signature: John Oberlin Date: 7-17-2014

State of West Virginia

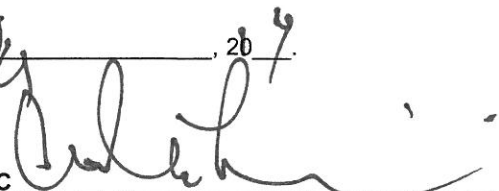
County of Monongalia, to-wit:

Taken, subscribed, and sworn to before me this 17 day of July, 2014.

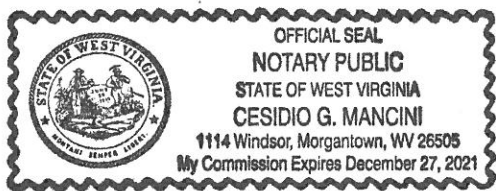
My Commission expires 12-27-2021, 20  .

**AFFIX SEAL HERE**

**NOTARY PUBLIC**



*Purchasing Affidavit (Revised 07/01/2012)*



# State of West Virginia VENDOR PREFERENCE CERTIFICATE

Certification and application\* is hereby made for Preference in accordance with **West Virginia Code**, §5A-3-37. (Does not apply to construction contracts). **West Virginia Code**, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the **West Virginia Code**. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Vendor Preference, if applicable.

1. **Application is made for 2.5% vendor preference for the reason checked:**  
 Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or**,  
 Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor who has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or**,  
 Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; **or**,
2. **Application is made for 2.5% vendor preference for the reason checked:**  
 Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or**,
3. **Application is made for 2.5% vendor preference for the reason checked:**  
 Bidder is a nonresident vendor employing a minimum of one hundred state residents or is a nonresident vendor with an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia employing a minimum of one hundred state residents who certifies that, during the life of the contract, on average at least 75% of the employees or Bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or**,
4.  **Application is made for 5% vendor preference for the reason checked:**  
Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; **or**,
5. **Application is made for 3.5% vendor preference who is a veteran for the reason checked:**  
 Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; **or**,
6. **Application is made for 3.5% vendor preference who is a veteran for the reason checked:**  
 Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.
7. **Application is made for preference as a non-resident small, women- and minority-owned business, in accordance with West Virginia Code §5A-3-59 and West Virginia Code of State Rules.**  
 Bidder has been or expects to be approved prior to contract award by the Purchasing Division as a certified small, women- and minority-owned business.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

**Under penalty of law for false swearing (West Virginia Code, §61-5-3), Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.**

Bidder: WVU, BBER  
Date: 7-18-2014

Signed: John Oebler  
Title: Director, BBER