

Comprehensive Economic Development Strategy for Central Oklahoma

Prepared for the Association of Central
Oklahoma Governments

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Association of Central Oklahoma Governments

The Association of Central Oklahoma Governments (ACOG) is an organization of city, town and county governments within Central Oklahoma. ACOG's purpose is to aid local governments in planning for common needs, cooperating for mutual benefit and coordinating for sound regional development. The ACOG region includes Oklahoma Cleveland, Canadian and Logan counties. ACOG serves as the Metropolitan Planning Organization and manages regional, environmental, economic development and livability programs. 9-1-1 ACOG administers the enhanced 9-1-1 system in Central Oklahoma.

TIP Strategies

TIP Strategies is a privately held Austin-based economic development consulting firm committed to providing quality solutions for public and private-sector clients. Established in 1995, the firm's primary focus is strategic economic development planning. In addition, TIP has experience with entrepreneurship, target industry analysis, workforce, and redevelopment. TIP's methods establish a clear vision for economic growth. Community leaders across the country have embraced the TIP model of Talent, Innovation, and Place to achieve successful and sustainable economies.

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Introduction

The central Oklahoma region is served by a number of established and respected economic development organizations. In fact, the efforts of the City of Oklahoma City and the Greater Oklahoma City Chamber have propelled the region into the national limelight.

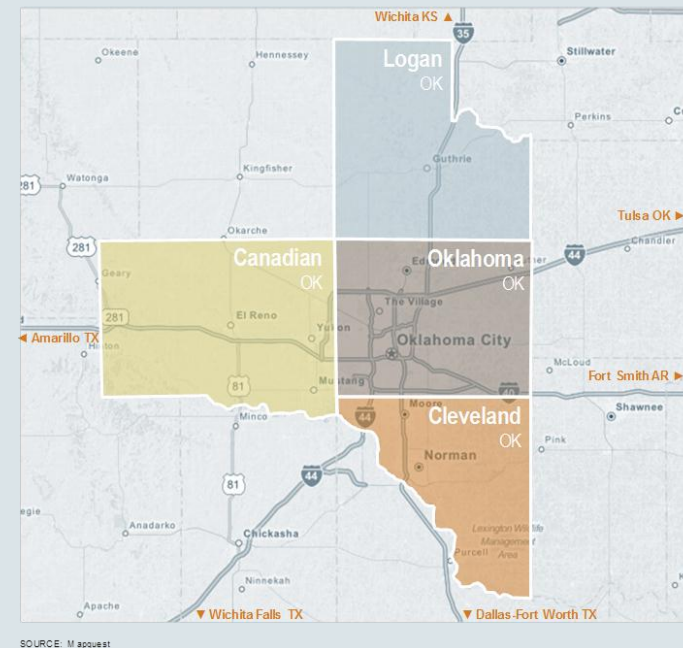
The purpose of this Comprehensive Economic Development Strategy (CEDS) is to provide the Association of Central Oklahoma Governments (ACOG) with guidance on enhancing the efforts of existing organizations and redefining its own role. Through its designation as an Economic Development District (EDD), ACOG can become a vital economic development partner for the central Oklahoma region.

This CEDS was written with the recognition that ACOG can enhance the activities of existing organizations while supporting growth throughout the region. ACOG's role as an economic development liaison, assisting in the coordination of regional initiatives and supporting infrastructure for major projects, opens new opportunities for all entities.

After acquiring a grant from U.S. EDA, ACOG hired TIP Strategies, Inc., an economic development consulting firm from Austin, Texas, to assist in crafting strategies that will leverage the four-county region's key opportunities. The findings and recommendations outlined in this document should serve as a framework for guiding regional economic development initiatives and the allocation of public and private resources to enhance central Oklahoma's economic development efforts. To conduct this work, TIP toured the region, met with key stakeholders, analyzed economic and demographic trends, and reviewed relevant planning documents.

The goals, strategies, and actions outlined in this report, if fully implemented, will go far toward positioning central Oklahoma as the northern anchor of the booming I-35 corridor and as one of the nation's leading growth centers. TIP's recommendations are based on our experience working in communities and regions across the country and applying our knowledge of economic development best practices for central Oklahoma.

The 4-county ACOG region



I. Strategic Plan

An economic development vision of central Oklahoma based on the area's potential to develop into a premier business destination is fully attainable. For this to occur, central Oklahoma must diversify its economy beyond its two major sectors: energy and government. Achieving this will require sustained and coordinated efforts from all the region's economic development partners. Becoming more competitive with other metropolitan regions along the I-35 corridor is a necessary first step. **The keys to central Oklahoma's success will be in the provision of better sites to accommodate new companies, the development of an innovation-driven economy through partnerships with higher education institutions, and its ability to attract and retain a highly educated workforce.**

We believe that the following four goals provide a strong framework for specific strategies and actions that will lead central Oklahoma toward this vision:

Goal One: Retain and expand existing businesses, and attract new businesses in the central Oklahoma region.

Goal Two: Coordinate economic development efforts with regional partners.

Goal Three: Develop, retain, and attract talent.

Goal Four: Enhance and promote quality of place.

While each of these goals was chosen for its ability to leverage distinct opportunities in central Oklahoma, they were also intentionally chosen for their ability to support one another. ACOG and its partners should, therefore, remain mindful that a lack of support for one of these goals may hinder progress in another. Recognition should also be given to the fact that policies supporting a strong business climate cannot be improved within a vacuum. Instead, they should be considered within the overall context of a wide variety of factors that will influence the long-term economic vitality of central Oklahoma. Included among these are the region's ability to compete for innovation, business, and talent.

Goal One: Retain and expand existing businesses, and attract new businesses in the central Oklahoma region.

The U.S. manufacturing industry continues a transformation that has profound effects on the practice of economic development. This transformation is forcing us to rethink what we mean by a primary job, how we measure economic impact, and how we design incentives. This is due, in large part, to the continued decline in manufacturing employment. It is no overstatement to say that you cannot build an economic strategy solely around manufacturing jobs.

Central Oklahoma leaders know that “economic development is a marathon, not a sprint.” Sustained economic development efforts – already proven in practice – are required. One of the most critical aspects of economic development is ensuring adequate sites for business and industrial development. Thanks to its Great Plains location, central Oklahoma has few, if any, geographic constraints to its physical development. In fact, the Oklahoma City metro area sprawls across a seven-county region. In spite of this, few large sites suitable for industrial development remain within Oklahoma County and the immediate surrounding areas. This is in large part due to land use decisions made by municipalities that favor retail development along major corridors, as well as zoning variances allowing low density residential uses in areas that had previously been zoned for industrial. The latter situation has resulted in pockets of residential neighborhoods that scatter across the landscape, which then severely hinders the ability to assemble large contiguous tracts of land for other uses.

Retaining and promoting sites is only one part of the solution, however. The needs of existing employers must not be overlooked. Building awareness of existing employers, which includes developing policies and mechanisms to support local business and industry, is a must. According to a recent Brookings study, the expansion of existing businesses accounts for nearly 42 percent of all new jobs in a typical state (56 percent is the result of the birth of new establishments).¹ The remaining two percent can be attributed to business relocations. Given the lingering effects of the national recession on the economy, it is critical that the region’s economic development community understand how local issues affect the competitiveness of existing local industry. A final component in achieving economic diversification is the implementation of a target sector marketing campaign.

¹ http://www.brookings.edu/~media/research/files/papers/2011/1/19%20clusters%20muro/0119_clusters_muro

- **Strategy 1.A: Ensure that adequate sites and infrastructure are available for business and industrial development.**

Early in the planning process, the issue of the lack of available land for business and industrial development was raised. This should be a major concern for regional economic developers. The dearth of sites makes central Oklahoma less competitive for recruitment prospects and potential expansions. Ensuring that sites are identified, prioritized, and made 'shovel-ready' should be a top priority for the region's economic development efforts, and it is essential that the region make it a priority to offer a quality "product" from a real estate standpoint.

Actions:

1. Continue working with area cities, counties, and local chambers to catalogue all business and industrial sites. A fresh database of all available sites, indicating their "shovel-readiness," will help regional economic developers market central Oklahoma to prospects and local companies seeking expansion opportunities.
2. Prioritize the identified sites for each of the target industries. Once all the sites have been identified, determine which sites offer the strongest attributes for each of the region's target sectors (See Section III Target Sector Profiles, beginning on page 48, for a listing of targets and site requirements).
3. Develop a land use and utility plan for each of the preferred sites. This should include updating development processes, determining — and enforcing — appropriate zoning, and providing needed infrastructure to accommodate desired uses at each of these sites. TIP has provided a general guideline of site and building requirements for various economic sectors (See Section V Sites and Building Requirements, beginning on page 85).
4. Continue to seek EDA funding to assist in infrastructure upgrades. The U.S. Economic Development Administration (EDA) offers grants for the improvement of sites and industrial parks. The completion of this CEDS planning process will enable ACOG to become an Economic Development District, and allow the region to become more competitive.

- **Strategy 1.B: Retain and expand existing businesses.**

A business retention program is like the adage that says you must attend to your existing customers first. Without that, you jeopardize your base. Focusing on existing business should be the heart of any economic development program. This is especially true in light of the recession, during which there were fewer recruitment prospects and more existing businesses in distress.

A business retention and expansion (BRE) program helps the economic development organization develop a clear understanding of the businesses already in the community and helps keep tabs on the challenges they face. The primary functions of a BRE program are threefold: 1) to ensure that at-risk businesses receive support, especially when that risk is the result of labor issues or other factors the community can influence; 2) to expand and support growing businesses; and 3) to act as an ombudsman for local businesses generally.

A bird in the hand

The expansion and retention of existing businesses should be at the heart of any economic development strategy. Existing businesses form the backbone of a thriving economy. They typically represent the best opportunity for increasing the employment and tax base of a community and the greatest economic threat if they close or relocate. But local firms are often overlooked in a community's enthusiasm to recruit new, headline-generating businesses.

Given the fiercely competitive environment for business attraction and the myriad of issues facing most communities with regard to the recruitment of new business, business retention should be a baseline activity for economic development organizations. In other words, all other initiatives, including business recruitment, should be considered in light of their ability to complement and support the existing business network.

Actions:

1. Enhance business retention and expansion efforts. Building awareness of the needs that existing employers have, and developing policies and mechanisms to support local business and industry, is a must. Local companies are the most reliable source for creating new jobs. Given the ongoing national recession, it is critical that area economic development partners understand how local issues affect the competitiveness of local industry. BRE activities should include the following:

- Build and maintain an inventory of local businesses to: 1) ensure an understanding of types of businesses in the community, and 2) keep tabs on expansions and layoffs.
 - Place periodic calls to existing employers to uncover potential opportunities for local expansions. These meetings should also serve to make existing employers aware of technical and financial assistance programs.
 - Create an annual survey of area businesses to keep tabs on their opinions of the area's business climate. Evaluate options such as a mailer, flyer in the local newspaper, or an on-line survey. Internet technology has made conducting surveys and questionnaires much more convenient and affordable. Several internet applications, such as Survey Monkey (www.surveymonkey.com), are appropriate for this purpose.
 - Make sure that local businesses and industries remain aware of technical and financial assistance programs.
Act as a liaison between area workforce development providers and existing businesses to ensure local employers are aware of available training resources.
2. Develop an intervention strategy. Partner with other area economic and workforce development entities in coordinating “rapid response” efforts for dealing with potential layoffs or plant closures. Under the Federal Worker Adjustment and Retraining Notification Act (WARN) of 1989, companies with 100 or more employees must notify local governments and state workforce organizations about plant closings or mass layoffs at least 60 days in advance of the event. However, at this point, it is frequently too late to do anything. Identify “at-risk” companies early-on and develop an aggressive intervention strategy. As part of this effort, the community should identify the tools available to help avert such actions or ameliorate their impact.

Examples of these tools include:

- The manufacturing modernization services offered through the U.S. Department of Commerce's Manufacturing Extension Partnership (MEP) program.
- State and local workforce development boards' rapid response teams that provide assistance to workers facing dislocation.
- Relationships with site selectors, developers, and real estate brokers that ensure prompt reuse of a closed facility by a new tenant.

To be effective, intervention must occur early. As such, this strategy relies heavily on the information-gathering steps outlined above.

- **Strategy 1.C: Recruit companies within target industries.**

While strategies devoted to the retention and expansion of existing businesses should remain at the forefront of any economic development program, central Oklahoma should also continue to pursue an aggressive business attraction strategy with a view toward diversifying the region's economy. Currently, the region's economy is most significantly influenced by two primary sectors: energy (oil and natural gas), and government (federal, state, and local). This lack of economic diversity leaves central Oklahoma in a relatively vulnerable position. Global energy markets are prone to large price swings, resulting in 'boom and bust' cycles which can strongly affect the local employment base. In addition, looming federal deficits may force severe budgetary cut-backs, the influence of which could be felt at all levels of government.

Actions:

1. Modify the region's existing target sector list. The Greater Oklahoma City Chamber, with the support from area economic development partners, should continue to generate and promote a progressive image of the central Oklahoma region among target sectors. Currently, the chamber's target industry list includes the following: aviation and aerospace, biotechnology, energy, and logistics/distribution. TIP recommends the region expand this list to include the following:
 - Data/IT/Software
 - Life sciences
 - Healthcare
 - Advanced manufacturing

See the Section III Target Industry Profiles, beginning on page 48, for more information on each.

2. Build awareness among decision makers in target industries. Regional economic development partners should conduct a coordinated marketing campaign aimed at increasing private investment from the selected target sectors. The overarching objective is to generate quality prospects for central Oklahoma, leading to new investment and job creation. The effort should be organized around four primary themes: (1) invest in product development and messaging; (2) make direct contact with companies in target industries; (3) strengthen the referral network of regional partners; and (4) raise awareness through affinity marketing

3. Build awareness among site selectors. Once the preferred business and industrial sites have been selected and necessary infrastructure improvements have been made, the region's economic development partners should initiate a site consultant visitation program in conjunction with attendance at trade shows or other events. Partners should also develop a "familiarization tour" program for the entire central Oklahoma region, extending and growing its scope to include site consultants and regional industrial and commercial brokers

Goal Two: Coordinate economic development efforts with regional partners.

This comprehensive economic development strategic plan offers a host of strategies and actions to stimulate private investment activity throughout central Oklahoma. Given the regional nature of the plan and the limited resources of ACOG, it will require the support of partners from multiple entities to ensure its overall success. It is, therefore, of critical importance for ACOG to solicit assistance from regional economic development organizations, municipalities, and counties.

ACOG's primary challenge is the lack of internal resources to conduct an economic development program. In addition, there are a large number of cities, chambers, and other parties who can exert either direct or indirect influence over economic development decisions in central Oklahoma. As should be expected, these multiple entities serve varied, and often competing, constituencies. Moreover, the region as a whole is already served by a strong economic development entity, the Greater Oklahoma City Chamber. As a result, it should be recognized throughout the region that ACOG does not seek to supplant other economic development partners but, instead, to be seen as a supporting partner.

The initial step in the implementation of this plan is for ACOG to enlist the support of a broad-based coalition of partners, including the region's various cities and their economic development departments, area chambers, higher education institutions, and workforce development providers, who can influence the plan's implementation. In its presentation to these and other potential partners, ACOG must communicate an understanding of macroeconomic, technology, and policy trends and their effects on economic development opportunities for the region. To be successful, the central Oklahoma region, its constituent communities, and the area's various interest groups must forge a common vision and approach to influencing real estate development in such a way as to maximize its economic and fiscal impact.

- **Strategy 2.A: Position ACOG as a regional economic development partner.**

Economic development must be an orchestrated effort in which various organizations within a community collaborate to realize goals none of them could achieve individually. Facilitating this effort is the primary job of any economic development organization. ACOG's challenge is the lack of formal structure and resources to carry out economic development activities. It is recommended, therefore, that ACOG build internal capacity for economic development and serve as a coordinating agency in the implementation of this plan.

Actions:

1. Establish an economic development liaison office within ACOG. TIP recommends ACOG create a staff position to assist in the implementation of this plan. The primary responsibilities would be to act as an impartial liaison among various economic development entities and assist in coordinating regional transportation and infrastructure planning in support of economic development initiatives.
2. Promote the improvement of relations among regional municipalities and counties. The relationships between communities and their neighbors are often difficult due to competing interests and sometimes conflicting agendas. This is especially so for urban cores and their suburban neighbors when the competition is for sales taxes and private investment. Given ACOG's status as a regional public sector entity, the economic development liaison's office would be uniquely positioned to promote the collective interests of the region. Examples of activities include moderating roundtable policy discussions and hosting speaker event series to keep public officials and economic developers informed of regional economic development opportunities and challenges.
3. Determine organizational responsibilities for the implementation of this CEDS. Each of the economic development entities serving central Oklahoma has a distinct role in the region's economic development, and its activities should be suited to play to its inherent strengths. Upon the completion of this plan, ACOG should convene a meeting of area chambers, higher education institutions, municipalities, workforce development providers, and other economic development stakeholders to discuss the recommendations in this CEDS and agree to a clear operational framework of activities.

- **Strategy 2.B: Leverage higher education institutions to increase economic development opportunities throughout the region.**

The importance of higher education in economic development cannot be overstated. Employers must be assured of access to educated talent, and talent is drawn to locations that offer educational opportunities. Higher education institutions also play a crucial role in enhancing the image of a community both externally and internally. In addition, specific research programs can offer great potential for technology-transfer, private-public partnerships, and entrepreneurship. As a result, we recommend that the support of higher education assets become a more focused economic development activity. Recognizing that biotech and medical have already benefited from this approach, broader initiatives would provide enhanced benefits. For example, the National Weather Center at the University of Oklahoma provides the platform for an emerging regional cluster in software/IT/data management, as well as other related high tech fields, such as R&D in sensors, radars, and space imaging. Leveraging programs of these types will go far in assisting the region to develop expertise in high impact niche opportunities.

Actions:

1. Foster stronger ties between area universities and central Oklahoma's business community and policy makers through networking activities (e.g., annual event to honor new patent recipients, regular newsletter distributed to local area highlighting ongoing research, quarterly round-table discussions etc.). The purpose of this is to raise awareness of the region's innovation capacity and build support for university-led research and development.
2. Engage higher education institutions to assist in the development of an innovation-driven economy. Include area universities in future economic development planning and target industry recruitment efforts. Meet with appropriate university representatives on a regular basis to keep them abreast of initiatives and projects.
3. Advocate for increased federal and state support for research at area universities. Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) awards provide important funding to support research and development. Major sources of this funding in the central Oklahoma region have traditionally been funneled through Health and Human Services (HHS) and the Department of Defense (DOD). Because this is an important source of financial support for many local companies, economic developers in the region should track changes in budgeting for the DOD and HHS closely to anticipate potential shifts in funding availability over time.
4. Identify area leaders and prominent alumni who might serve as "champions" to support (financially or otherwise) technology transfer efforts.

- **Strategy 2.C: Leverage partnerships to increase entrepreneurship.**

Across the nation, economic developers have embraced entrepreneurship as a means of promoting economic diversification, local innovation, and stimulating growth. The reason is two-fold: 1) an economic transition in the U.S. which has created more market opportunities for entrepreneurs and 2) the recognition that entrepreneurs can be more deeply rooted in their communities, which increases both their economic and social impacts.

i2E currently plays a critical role in central Oklahoma in providing venture advisory services, access to capital, and entrepreneurial development services to high growth companies within the region. This plan recognizes that i2E should continue to lead this effort, and regional partners should continue to offer their support.

Actions:

1. Assist in the development of a coordinated, region-wide entrepreneurial program, which also involves area higher education institutions, and link entrepreneurship to target industry sectors.
2. Encourage local lenders to offer small business financing to aid area startups and strengthen the banks' Community Reinvestment Act (CRA) ratings.
3. Meet regularly with current and potential entrepreneurs in central Oklahoma to better understand issues affecting their businesses.

CASE STUDY: ENTREPRENEURIAL ENGAGEMENT AT THE UNIVERSITY OF TEXAS

The University of Texas at Austin (UT) has embraced innovation as a core component of its culture. Even its branding message reflects this: "What Starts Here Changes the World". To capitalize on this spirit of innovation and promote economic progress, UT has strengthened its programs to engage student and faculty entrepreneurs and has served as a resource for entrepreneurs in the state. A number of cross-disciplinary programs and events exist to achieve this:

Texas Venture Labs: a campus-wide initiative to accelerate start-ups from UT and the local community as well as create an experience that transforms graduate students into future entrepreneurs and business leaders.

3 Day Start Up: an entrepreneurship education program designed for university students with an emphasis on learning by doing. The idea is simple: start tech companies over the course of three days.

Idea to Product Competition: early stage technology commercialization plan competitions aimed at educating and developing the next generation of technology entrepreneurs.

Entrepreneurs in Residence: seasoned entrepreneurs who serve as mentors for students interested in starting businesses. The Office of Technology Commercialization also employs individuals who are charged with turning the university's research into start-ups.

Austin Technology Incubator: a program to provide a "teaching laboratory" in applied entrepreneurship for UT-Austin students and to promote economic development in Central Texas through entrepreneurial wealth and job creation.

4. Assist in promoting networking opportunities for area professionals and emerging leaders.
5. Work with tribal communities to identify and diversify their investment opportunities.

Goal Three: Develop, retain, and attract talent.

The concept of talent means more than a skilled workforce. It means recruiting talented people as well as cultivating the talent pool represented by groups as diverse as students, retirees, and entrepreneurs. It also means ensuring that the employees and companies that have been responsible for a community's growth continue to see a reason to remain in the area.

National demographic trends, most notably the aging of the baby boomers, suggest that demand for workers may soon outstrip supply. As a result, competition for labor is expected to increase among companies as well as communities. Focusing on the development, attraction, and retention of talent should, therefore, be an important part of any economic development strategy.

Economic development planning has traditionally focused solely on the recruitment of new businesses. Unfortunately, this approach depends heavily on tax abatements and the provision of sites with infrastructure services. While offering these and other incentives is certainly an important part of the overall economic development process, many economic developers stop at this point and do not recognize they have used only the most basic tools in the kit. Nurturing and attracting talent is perhaps the most fundamental issue for creating long-term, sustainable economic vitality. But this "talent" goal implies more than the typical workforce development and training issue.

Without a doubt, the area's higher education assets are a major advantage for central Oklahoma in developing talent. Anecdotal accounts, however, indicate that many of their former students traditionally pursue occupational opportunities outside the region or state with Dallas-Fort Worth being a primary destination. This 'brain drain' phenomenon is not unique to central Oklahoma. What distinguishes the region from other areas, however, is that it possesses the attributes to reverse this trend by not only retaining these young adults but also attracting young professionals and entrepreneurs from elsewhere.

- **Strategy 3.A: Leverage universities to deepen the region's talent pool to support expansion in target sectors.**

The role of university research and technology transfer in developing innovative economies is undisputed and clearly understood. However, many economic developers neglect the primary role of these institutions: education. While it is obvious that the presence of higher education in a region generally leads to a more talented local workforce, rarely is there deliberate coordination in the development of specialized degree programs within four-year colleges to match local economic development goals or business interests. Aligning these programs with local opportunities can lead to the development of new talent-based industry clusters.

Universities can also play a role in the recruitment of talent through their alumni networks. Targeting former students with already established ties to central Oklahoma is likely to garner success in talent recruitment marketing efforts for several reasons. First, the target audience already has a familiarity and an assumed affinity with the region. Second, former students with strong ties to their alma mater may already desire to relocate if given the appropriate opportunity. Third, former students would presumably be easier to reach through their alumni network and, therefore, less expensive to target than those with no formal ties.

Actions:

1. Encourage area universities to expand and strengthen programs related to target sectors. The Academy of Contemporary Music at the University of Central Oklahoma (ACM@UCO) provides an excellent example of the establishment of a program whose primary intent is to deepen the pool of talent for a specific industry.
2. Leverage job placement programs at area colleges and universities to assist current students and recent graduates in finding local career options among businesses within the targeted sectors.
3. Partner with alumni associations from area universities to attract former students back to central Oklahoma. Specific tasks to support this action include:
 - Developing marketing material and using social media to inform alumni of opportunities and current events in central Oklahoma (e.g. job postings, business expansions, investment opportunities, and planning initiatives).
 - Meeting with the alumni organizations of area universities and colleges along with specific university departments to raise awareness of economic development and business opportunities in central Oklahoma.

- Working with alumni organizations, university placement offices, and key allies to identify prominent former students that might be interested in pursuing business opportunities in central Oklahoma.
- Encouraging alumni organizations to assist in marketing central Oklahoma as a business destination. If willing, ask them to circulate a newsletter as an appendix to their existing materials.

- **Strategy 3.B: Coordinate training with workforce development providers.**

Access to skilled workers is one of the most critical issues facing employers today. Even in this time of elevated unemployment rates, as the nation slowly recovers from the “Great Recession”, employer surveys consistently reveal workforce shortages in occupations requiring technical skills. This is true in both blue- and white-collar industries.

The national emphasis on increasing educational attainment levels may have the unintended consequence of siphoning students from technical training. The push by government agencies, nonprofit organizations, and community groups to increase the number of “college graduates” may be interpreted as promoting (and is sometimes specifically geared towards) the attainment of a four-year degree. Yet, many of the nation’s fastest growing occupations require less training and offer higher earnings potential. Workforce and education professionals should continue to emphasize the importance of this alternative path to success.

CASE STUDY: NORTHERN KENTUCKY INDUSTRIAL PARK INDUSTRY PARTNERSHIP

A group of about 50 manufacturers in Northern Kentucky have come together to tackle the perception problem manufacturers face. Though manufacturers have independently undertaken initiatives to influence students’ perceptions, they believe a collective approach could be more effective.

The group applied for a \$65,000 grant from the Kentucky Office of Employment and Training to help implement a plan to address the shortage of qualified workers in manufacturing occupations. The first step of the plan is to survey all the existing manufacturers in the region to determine what the job needs are and the core competencies necessary to fill those positions. The next step will be to determine the various reasons young people are not considering jobs in manufacturing and to dispel misconceptions.

The ultimate goal of the program is to develop a talent pipeline that begins in the high schools, goes through the colleges, and continues into the companies.

Actions:

1. Enhance the coordination of workforce training with economic development goals.
 - Facilitate an annual workforce conference of owners and/or plant managers of industrial establishments and representatives of technical colleges, as well as other workforce development resources to: a) Review workforce assets and skilled labor needs and b) Maintain and strengthen relationships between career and technology schools, regional economic developers, workforce boards, and the industrial community.
 - Ensure that training programs continue to match industry needs in central Oklahoma.
 - Support new and expand existing internship/apprenticeship programs (if needed) that aid in the placement of vocational/technology students with area employers to support their needs for skilled workers.
 - Check workforce development plans for additional actions.

2. Develop a youth outreach program to increase interest in the skilled trades.
 - Make sure school guidance counselors and teachers are armed with the best possible information about career options in industries that require skilled labor.
 - Host “Skilled Trades Days” in connection with youth-focused events.
 - Explore the feasibility of creating a region-wide campaign (e.g., public service announcements) to encourage people to go into career and technical training. These efforts should focus on career opportunities and earnings potential for these fields.
 - Link skilled trade occupations to creativity. While these jobs are sometimes viewed as “dirty jobs,” they often involve problem-solving and other aspects of creative thought.

• **Strategy 3.C: Position central Oklahoma as a destination for young professionals and entrepreneurs.**

Establishing “business friendly” policies, creating incentives, and developing entrepreneurship programs are often insufficient ways of stimulating start-up activity, especially if a region does not have a long history as a hot bed for new business formation and innovation. In this case, a cultural shift must take place, which requires a substantial outreach and educational campaign.

Actions:

1. Foster a nurturing entrepreneurial culture to draw young professionals and talent to central Oklahoma.
 - Incorporate youth entrepreneurship training in public schools to inspire an entrepreneurial spirit among the area’s young citizens.
 - Actively engage area university students in entrepreneurial activities through student internships, conferences, and business plan contests.
 - Celebrate local success stories (e.g., when patents are issued or startups are launched) in the media with press releases and through a newsletter to alumni and the business community.
2. Raise awareness of central Oklahoma as a hotbed for innovation; attract the attention of both investors and entrepreneurial talent through a national marketing campaign; leverage the alumni networks of area universities.

CASE STUDY: COLUMBIA TALENT MAGNET PROJECT

The Columbia, S.C., region has a long-term strategic plan to transform the area’s economy, create jobs, and raise per-capita income, even in the current recession. Given this, EngenuitySC, an active public-private partnership focused on the region’s knowledge-based economy, recognized that the area’s economic growth will largely be driven by its ability to attract and retain young, highly educated and engaged workers. Yet, many graduates of local colleges and universities were leaving the region. So, in 2007, EngenuitySC created the Columbia Talent Magnet Project to focus on attracting and retaining young talent to the area. The project, collaboration among the region’s leading community and economic development organizations, focused on five core programs:

- Create a shared vision for Columbia as a talent magnet.
- Promote Columbia as a destination city, recognize talent as a key economic opportunity, and use unified messages.
- Connect university students to the dynamic Columbia business and entrepreneurial community.
- Increase the number of students, young professionals and transplants connecting into the civic community.
- Create an environment which embraces an entrepreneurial spirit and start-up opportunities.

Social networking and social media were vital in communicating with young professionals. For example, the project established a Facebook group so users could discuss Columbia talent issues, post recent news, list job openings, notify group members of events, and connect with others interested in living and working in Columbia. Project administrators conducted an online survey to take the pulse of the community on talent issues. Based on the survey results, they held an invitation-only Talent Magnet Forum to develop plans for attracting and retaining knowledge workers. From this, they set up meetings with community groups, starting with the city council, to launch initiatives throughout the region to keep the strategy ongoing. The Columbia Talent Magnet Report, released in June 2009, presented the project’s findings and recommendations for building a talent-powered economy.

Goal Four: Enhance and promote quality of place.

Much has been written about the importance of quality of life to economic development. Communities and regions throughout the nation have positioned themselves by touting their advantages in this regard—good schools, safe streets, pleasant weather. We agree these factors are important. We take issue only with the narrowness of the focus. Quality of life assumes that everyone thrives in the same environment and is attracted to the same amenities. It assumes that current residents' view of what makes a community would be shared by all.

By contrast, quality of place considers what is attractive to a range of residents, both old and new. The idea of quality of place accommodates growth and recognizes the benefits of change. It recognizes that one person's "good place to raise a family" might translate into another's "there's nothing to do in this town." Quality of place is about providing options, not just for current residents, but for those who will be residents in the future.

Increasingly, companies rely on the skills and talent of their workforce to retain or gain a competitive advantage. Only recently have employers discovered that one way to tap into talented workers is by locating operations in communities with a strong sense of place. This is because communities offering a multitude of amenities are the ones attracting many of today's skilled and talented workers.

Over the course of the last two decades, central Oklahoma has vastly improved its quality of place amenities. This is, in large part, due to Oklahoma City's Metropolitan Area Projects (MAPS): a series of capital improvement projects for new and upgraded sports, recreation, entertainment, cultural, educational, and convention facilities. Projects funded through MAPS include Bricktown Canal and Ballpark, Cox Convention Center, Chesapeake Energy Arena, and improvements along the Oklahoma River. These projects have demonstrated the city's commitment to the success of the urban core and brought new investment to downtown as demonstrated by the recently completed construction of the Devon Energy Center, a new 52-story skyscraper and home to Devon Energy Corporation.

These major improvements — combined with the strength of the region's economy — have raised central Oklahoma's profile to a degree never before seen at a national level. For example, RelocateAmerica recently listed Oklahoma City on its list of the Top 10 best places to live. Parlaying this "buzz" into increased tourism and business relocation should be the next step in the region's evolution toward becoming a national and international destination. This is also in recognition that the region's arts and cultural assets themselves represent a strong economic engine for central Oklahoma.

- **Strategy 4.A: Continue to support the development of a vibrant urban core.**

The redevelopment and revitalization of downtown Oklahoma City has raised the profile of not only the central city but also the entire central Oklahoma region. This is because a healthy urban core makes a region more competitive in the pursuit of new businesses. Business prospects often see the state of a downtown as a reflection of whether a region values excellence in investment. Moreover, companies realize that in the competition for talent, a metropolitan area that offers a higher quality of life and stronger sense of place makes it easier for them to recruit and retain the workers they need to remain successful.

Actions:

1. Strengthen linkages between downtown Oklahoma City and destinations around the region.
 - Create corridor plans to connect downtown to other major employment centers, including the OU Medical Center and the State Capitol complex.
2. Support further iterations of the MAPS planning process with a focus toward:
 - Enhancing public amenities and regional aesthetics, and
 - Linking improvements to economic development opportunities.
3. Continue to promote infill and redevelopment, especially housing, to increase population density within the urban core.

- **Strategy 4.B: Increase awareness of the region as a national destination.**

The primary purpose of traditional economic development marketing is to generate interest from companies with expansion or relocation plans. However, given the current environment in which many skilled professionals are selecting place first and job second, the marketing campaign should also attract individuals to the region. To do so, central Oklahoma will need to differentiate itself from its competitors while also promoting specific opportunities for businesses. This can be achieved through the development of a two pronged marketing strategy aimed at national tourists and visiting conferences.

Actions:

1. Leverage tourism marketing for talent attraction, entrepreneurship, and economic development by identifying a complementary theme for tourism attraction, business recruitment, and talent attraction.

2. Establish an aggressive conference and convention strategy linked to target sector opportunities:
 - Coordinate the targeting of specific businesses and organizations for holding conferences.
 - Ensure that regional economic development partners attend certain conferences and meetings to market central Oklahoma to representatives of the target sectors.
 - Establish a volunteer program through which area business professionals and/or retired entrepreneurs could market central Oklahoma assets to conference attendees.
 - Create a brief profile and a coherent, coordinated marketing message to assist economic developers and volunteers in promoting central Oklahoma's positive aspects.
 - Create a formal mechanism through which the volunteers could refer potential business relocation leads.

II. Economic & Demographic Assessment

Introduction

The purpose of this Demographic and Economic Assessment is to arrive at a common understanding of the region's unique economic strengths, weaknesses, opportunities and threats. This preliminary data analysis only presents the first step in the planning process and will form part of the foundation for the subsequent economic development plan for the Association of Central Oklahoma Governments (ACOG). TIP will provide additional relevant information for specific opportunities as they are uncovered by this planning process.

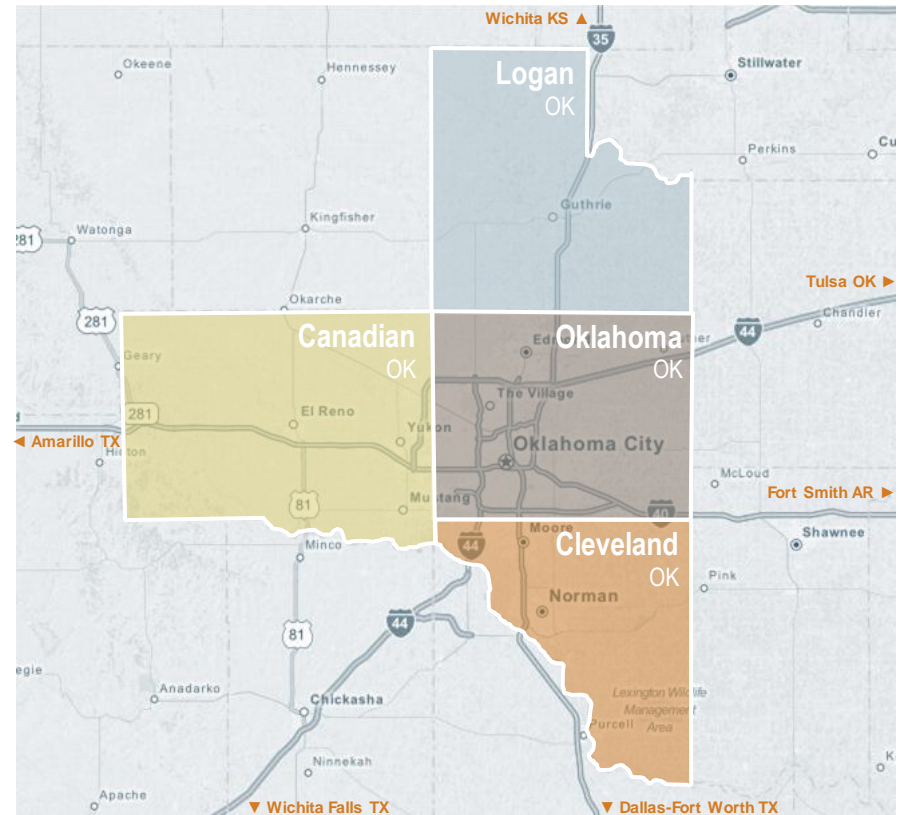
Methodology

This analysis is expressed in the context of the state and national economies as a means for understanding the region's relative position within the state and highlighting its competitive advantages.

For this socioeconomic assessment, TIP included an analysis of the following topic areas:

- Demographics
- Migration
- Economy
- Innovation
- Workforce
- Occupations

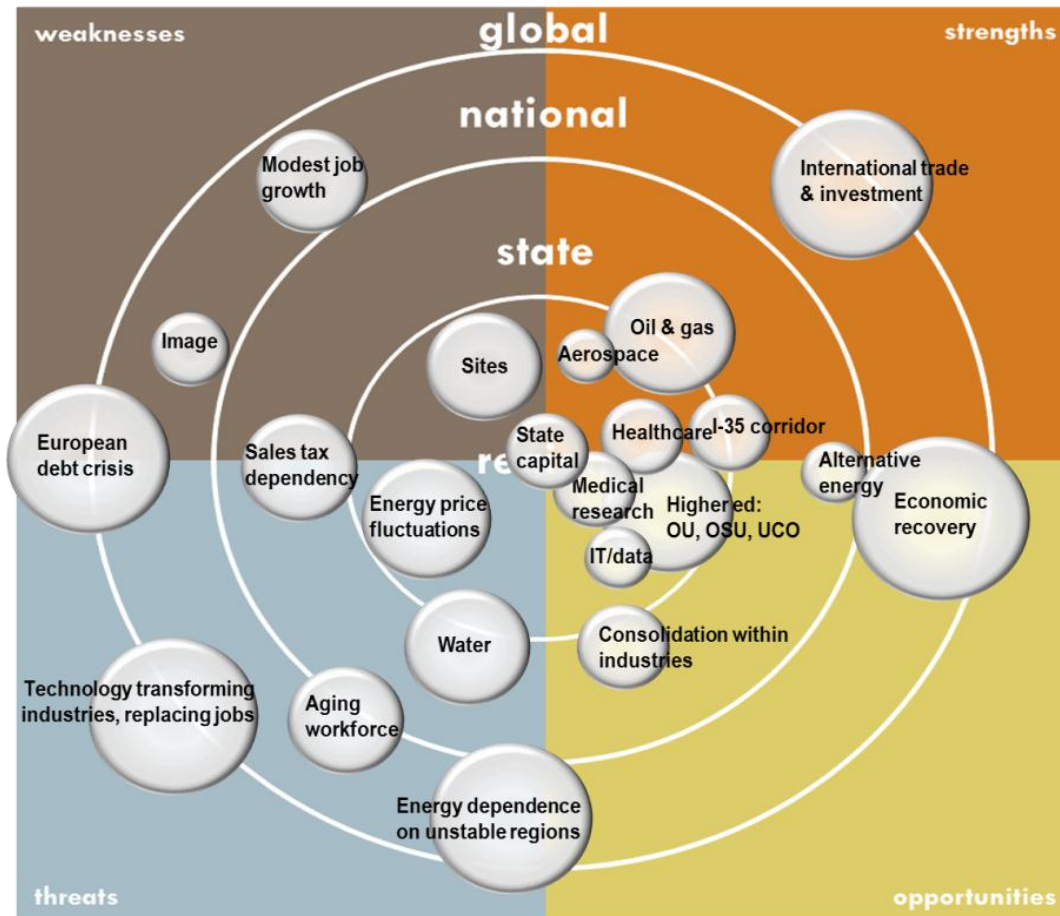
The 4-county ACOG region



SOURCE: Mapquest

SWOT

A broad cross-section of citizens and interest groups developed the content, along with a comprehensive data analysis. Based on this work, TIP assembled a SWOT analysis for the region (strengths, weaknesses, opportunities, and threats), which provided the foundation for this plan. The specific elements of the following SWOT chart are described throughout the assessment and in the body of the report.



Summary of Findings

The following is a highlight of TIP's findings from our analysis of key socioeconomic indicators, enhanced by anecdotal knowledge gained through interviews and focus groups with local business and civic leaders from throughout the ACOG region.

- The four-county ACOG region is rapidly recovering from the effects of the recent Great Recession, the nation's deepest and most prolonged economic crisis in the last 75 years. However, the area's economy did not suffer to the same degree as most of the rest of the country. This is in large part due to three circumstances: 1) While the Oklahoma City region saw a dramatic increase in building permits in the middle part of the decade, much of this appears to have been driven by strong demand generated by a healthy energy sector rather than rampant speculation. 2) During the recession, a drop in demand for oil and gas resulted in local job losses, but global energy demand (primarily from emerging economies, such as China) picked back up quickly causing prices to rise again. 3) Thanks to its status as the state capital, the location of Tinker AFB, and the strong presence of several higher education institutions, the region was able to rely on multiple layers of public sector entities to cushion the blow from the severe downturn.

- Thanks to a multitude of factors, including a strong higher education presence, a burgeoning regional medical center, growing global energy demand, and continued civic investments in the urban core, the ACOG region appears poised to utilize these assets and opportunities as a springboard for even more rapid growth in the coming decade. In all likelihood, Oklahoma City will increasingly be viewed as the northern anchor for the I-35 corridor, an America 2050 designated megaregion (one of ten nationally). This corridor is widely viewed to form one of the nation's leading growth centers for the next several decades. Recent competition for economic development projects from other corridor metropolitan areas, indicate that businesses increasingly view the corridor as a collective entity within which they must weigh the advantages of a single site. As such, economic development entities operating within the ACOG region should focus efforts on projects that leverage specific opportunities and strengths presented by the metro area's location on the I-35 corridor.

- While data compiled for this assessment cannot tell the entire story, strong implications are present. While it should come as no surprise that the four-county ACOG area is a regional employment center, population growth, commuting, and migration trends indicate its position as a talent magnet is also strengthening. Thanks to the presence of multiple universities, community colleges, and workforce training assets, the region offers businesses educated talent and skilled labor. This is not to say, however, that challenges are nonexistent. Two primary obstacles for the region's emergence as a national talent magnet appear to be present, based on data and stakeholder interviews: 1) local wage rates lag the nation, making it more difficult to attract professional and technical talent in key fields to the region and 2) persistent national misperceptions of the state's quality of life hinder its attractiveness. Fortunately, great strides have been made and plans are continuing to be drawn up to address these issues. These include a series of enormously successful Metropolitan Area Projects (MAPS) to make improvements to

America 2050 is a national initiative to meet the infrastructure, economic development and environmental challenges of the nation. The organization is guided by the National Committee for America 2050, a coalition of regional planners, scholars, and policy-makers to develop a framework for the nation's future growth. For more information, see: <http://www.america2050.org>

the region's urban core and heighten awareness of Oklahoma City nationally. Moreover, investments in new research and development projects and expansion of academic programs hold great promise to increase innovation in emerging technology sectors. The continued improvement of urban amenities, expansion of academic programs, and investments in R&D will be required if the region aspires to become a nationally and internationally recognized talent magnet.

About the data

A number of data sources were used to prepare this analysis.

- Population. Historical estimates of population by county are from the U.S. Census Bureau; projections were prepared by Moody's Analytics.
- Unemployment. Data are from the U.S. Bureau of Labor Statistics' household survey (obtained via Moody's Analytics).
- Employment & occupation. Employment and occupational analyses were performed using Strategic Advantage, a suite of web-based analysis tools created by Economic Modeling Specialists Inc. (EMSI). Unless as otherwise noted, figures represent "complete" employment, rather than the "covered" employment typically produced by state and federal workforce agencies. Unlike covered employment, which includes only those industries covered by unemployment insurance, complete employment includes estimates of all industries. Employment data are presented in accordance with the North American Industry Classification System (NAICS, pronounced "nakes"). The system was developed under the direction and guidance of the Office of Management and Budget as the standard for use by Federal statistical agencies in classifying business establishments for the collection, tabulation, presentation, and analysis of statistical data describing the U.S. economy. Occupational data are categorized using the Standard Occupational Classification (SOC) system.

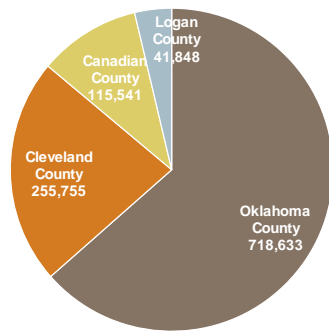
Population growth, 2000-2010

	2000	2010	Net chg	Pct chg
National				
United States	281,421,906	308,745,538	+27,323,632	+9.7%
Statewide				
Oklahoma	3,450,654	3,751,351	+300,697	+8.7%
4-County ACOG Region	990,085	1,131,777	+141,692	+14.3%
Canadian County	87,697	115,541	+27,844	+31.8%
Cleveland County	208,016	255,755	+47,739	+22.9%
Logan County	33,924	41,848	+7,924	+23.4%
Oklahoma County	660,448	718,633	+58,185	+8.8%

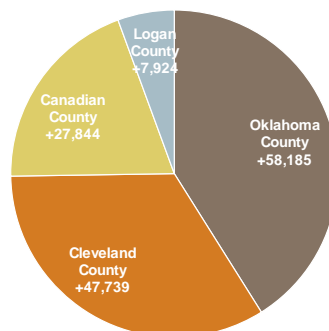
SOURCE: US Census Bureau, Census 2000 & Census 2010, SF1 data

Regional population trends, 2000-2010

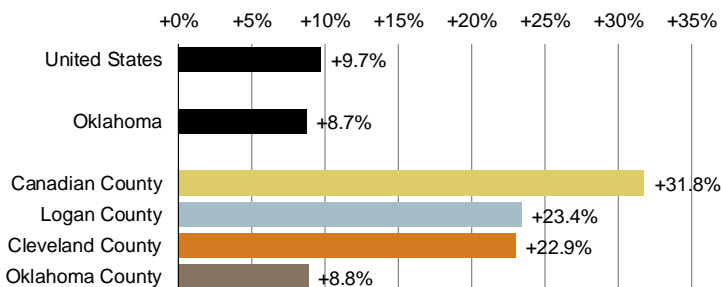
Total regional population, 2010



Total net gain, 2000-2010



Comparative population growth rates, 2000-2010



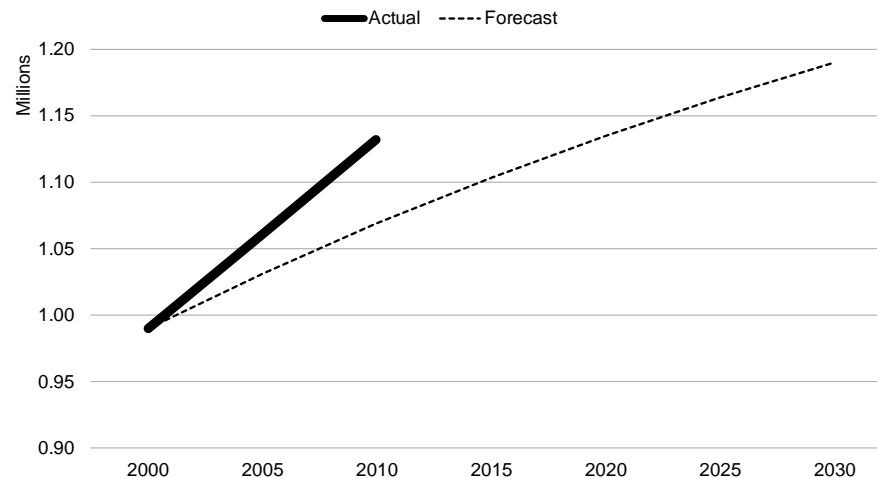
SOURCE: US Census Bureau, Census 2000 & Census 2010, SF1 data

Demographics

- During the course of the last decade, the four county region's population increased 14.3 percent, a significantly faster pace than the state and nation. In 2010, the region's population stood at approximately 1.1 million, which was 142,000 more than the previous 2000 Census count.
- While 75 percent of the region's population growth during the last decade can be attributed to Oklahoma and Cleveland counties, Canadian County experienced the fastest rate of growth.

ACOG population growth, actual vs. forecast

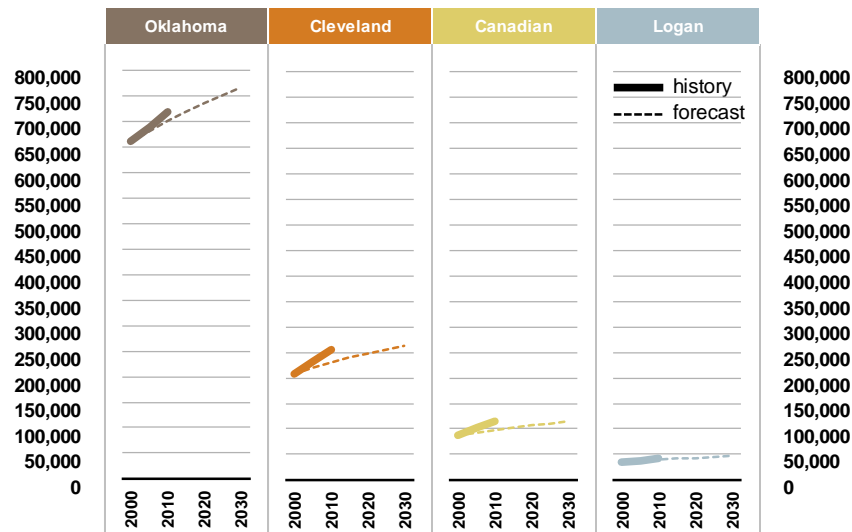
Actual population growth in the 4-county region outperformed the State Data Center's last forecast



SOURCES: Oklahoma State Data Center, Oklahoma Department of Commerce; US Census Bureau

Population

Actual population growth by county vs. the State Data Center's last forecast

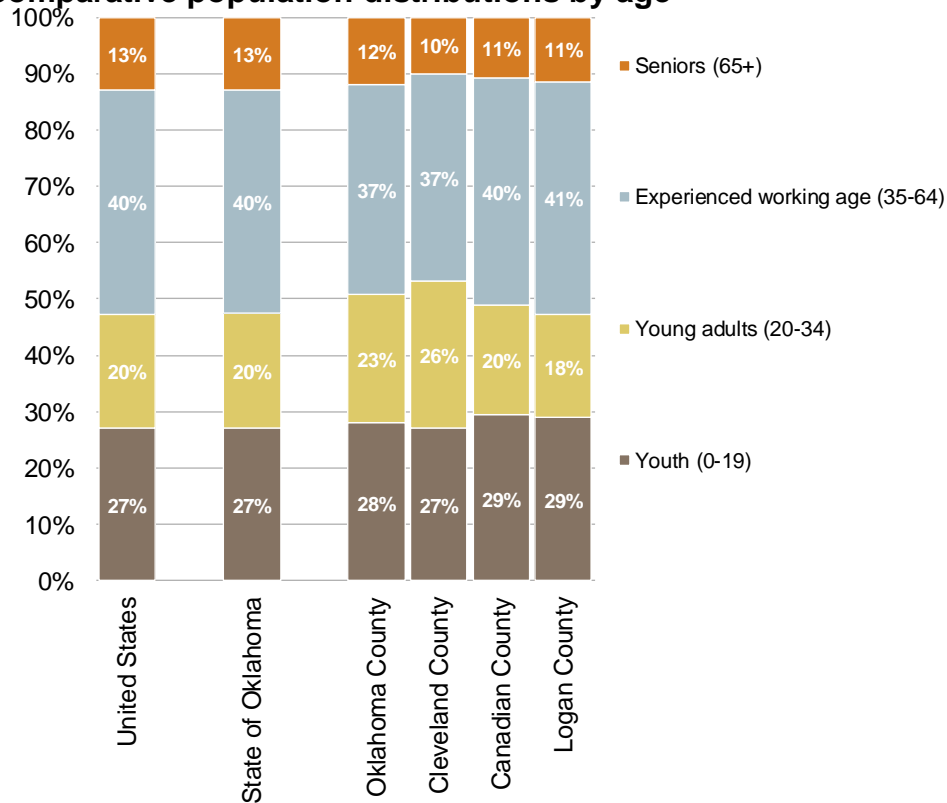


SOURCES: Oklahoma State Data Center, Oklahoma Department of Commerce; US Census Bureau

Demographics (cont'd)

- According to the Oklahoma State Data Center's last forecast of the region's future population growth, the four county area was not expected to reach 1.13 million people until 2020. The ACOG region's actual growth was double these projections during the last decade. As a result, it reached this size in 2010.
- While growth exceeded expectations throughout the region, the disparity between the forecast and the historical growth was greatest in Cleveland and Canadian counties.

Comparative population distributions by age



SOURCES: U.S. Census Bureau (American Community Survey, 2008-2010 average)

Demographics (cont'd)

- A distribution of the population by age reveals that people living in the ACOG region are, on average, younger than their statewide and national counterparts. For example, within the region between 10 and 12 percent of the population is 65 years or older. Nationally and throughout the state, that figure is 13 percent.
- Cleveland County, due to the presence of the University of Oklahoma, has the largest concentration of young adults. Logan County, the most rural in the region, has the largest share of the experienced working age cohort.

Migration

- Migration data reveal significant movement of people within the region. In 2010, approximately 11,600 residents of Oklahoma County relocated to Cleveland, Canadian, or Logan counties. During the same year, roughly 9,100 residents of those three counties moved to Oklahoma County. Other counties within the state that also showed large movements to the region include Tulsa, Pottawatomie, and McClain counties.
- Notably, the influx of residents from Dallas and Tarrant counties (which make up the urban core of the Dallas/Ft. Worth metroplex) was greater than the out-migration of Oklahoma City area residents.

Gross migration flows among ACOG and selected counties, 2010

Major patterns of relocation in the region

= number of residents who did not relocate across the county's boundaries during 2010

		Moving to...											
		Oklahoma	Cleveland	Canadian	Logan	Tulsa	Pottawatomie	McClain	Dallas (TX)	Grady	Lincoln	Payne	Tarrant (TX)
Moving from...	Oklahoma	501,440	6,737	3,745	1,182	954	759	506	477	512	372	341	394
	Cleveland	5,507	174,344	634	75	337	430	822	112	352	66	74	162
	Canadian	2,628	520	85,327	73	115	58	79	44	293	47	53	47
	Logan	976	108	57	27,531	54	<15*	<15*	<15*	<15*	21	129	<15*
	Tulsa	1,009	373	167	35								
	Pottawatomie	672	435	87	<15*								
	McClain	315	654	82	<15*								
	Dallas (TX)	491	123	41	17								
	Grady	392	333	198	<15*								
	Lincoln	374	71	<15*	28								
	Payne	461	92	54	107								
	Tarrant (TX)	426	132	82	24								

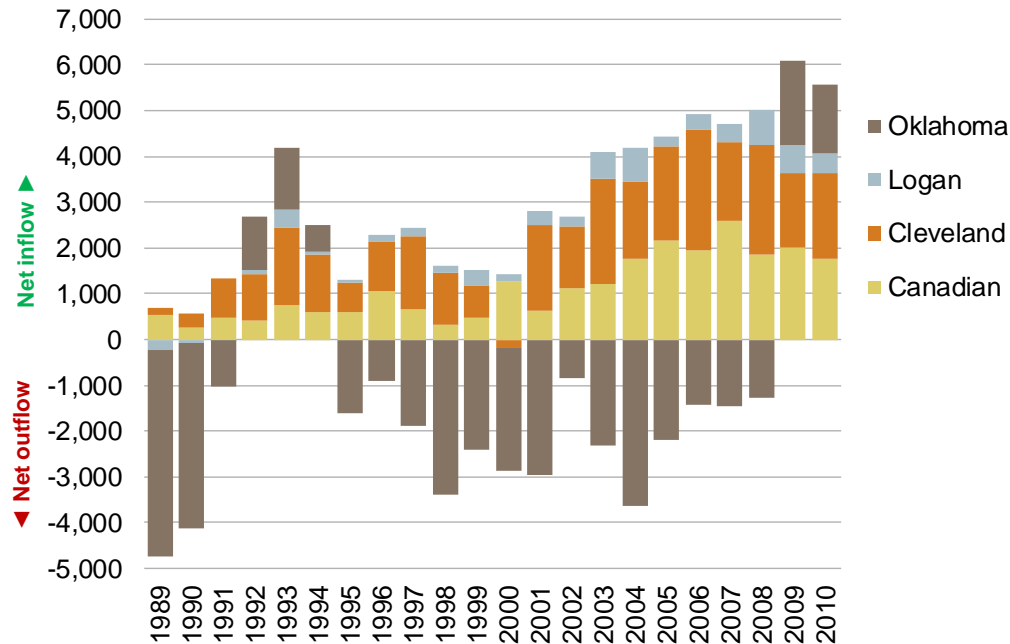
*NOTE 1: Some IRS mover data have been suppressed. For the IRS, the typical suppression level is (roughly) 15 exemptions.

NOTE 2: All counties listed are in Oklahoma unless otherwise noted.

SOURCES: U.S. Internal Revenue Service, 2010 County-to-County migration files

Net migration into (out of) the four ACOG counties, 1989-2010

Net migration flows based on the number and location of exemptions reported to the IRS



SOURCES: U.S. Internal Revenue Service, County-to-County migration files, 1989-2010; Moody's Analytics

Migration (cont'd)

- Over the course of the last two decades, migration trends reveal that the number of people moving to the ACOG region has been increasing. The primary destinations of new residents are Cleveland and Canadian counties.
- Significantly, net migration shifted to positive numbers in Oklahoma County in 2009 and 2010. This marks a major turnaround, as the county has consistently shown a net outflow of residents since the early 1990s.

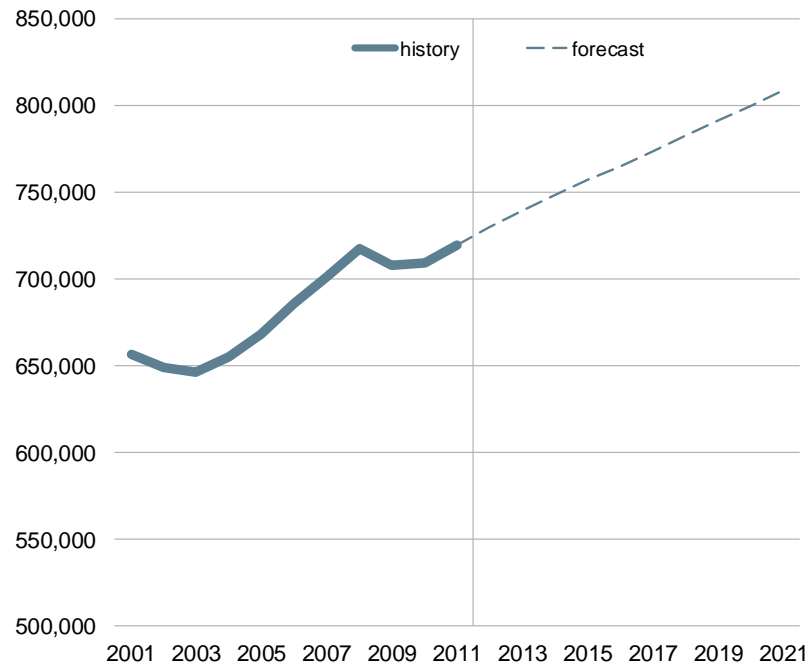
Total employment base, 2001-2011

	4-county ACOG region	Net chg	Pct chg
2001	656,749		
2002	648,998	-7,751	-1.2%
2003	646,220	-2,778	-0.4%
2004	655,354	+9,134	+1.4%
2005	668,324	+12,970	+2.0%
2006	685,827	+17,503	+2.6%
2007	701,374	+15,547	+2.3%
2008	717,483	+16,109	+2.3%
2009	707,941	-9,542	-1.3%
2010	709,213	+1,272	+0.2%
2011	719,702	+10,489	+1.5%
Total 10-year net change		<u>+62,953</u>	

SOURCE: EMSI Complete Employment - 20114

Total employment in the ACOG region

EMSI forecasts nearly 90,000 new jobs over the next decade

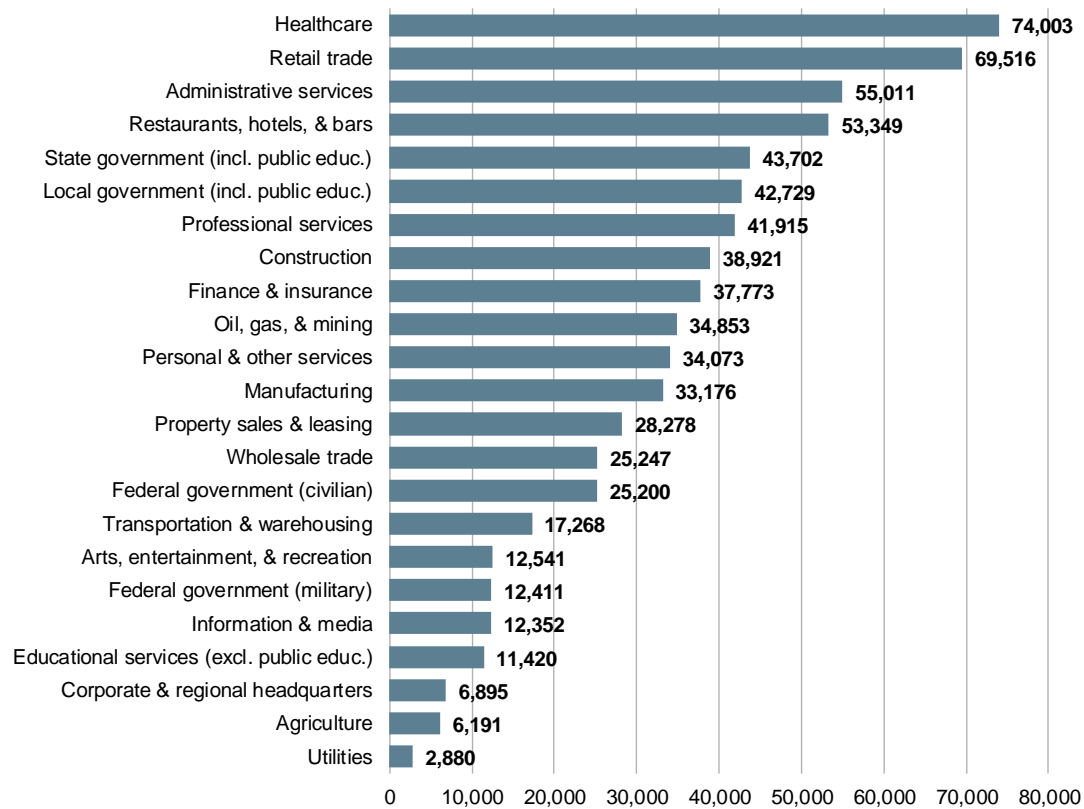


SOURCE: EMSI Complete Employment - 20114

Economy

- During the last 10 years, the ACOG region has experienced a net gain of almost 63,000 jobs for a total of approximately 720,000 in 2011.
- The region saw a net decrease in jobs only two times during the last decade. In both cases, this occurred during a national recession. Last year, the four counties had fully recovered from the recession and shifted into an expansionary period.
- Job forecasts provided by EMSI, indicate that the region could see a net gain totaling more than 80,000 jobs during the next 10 years.

ACOG region's 2011 job base by economic sector



SOURCE: EMSI Complete Employment - 20114

Economy (cont'd)

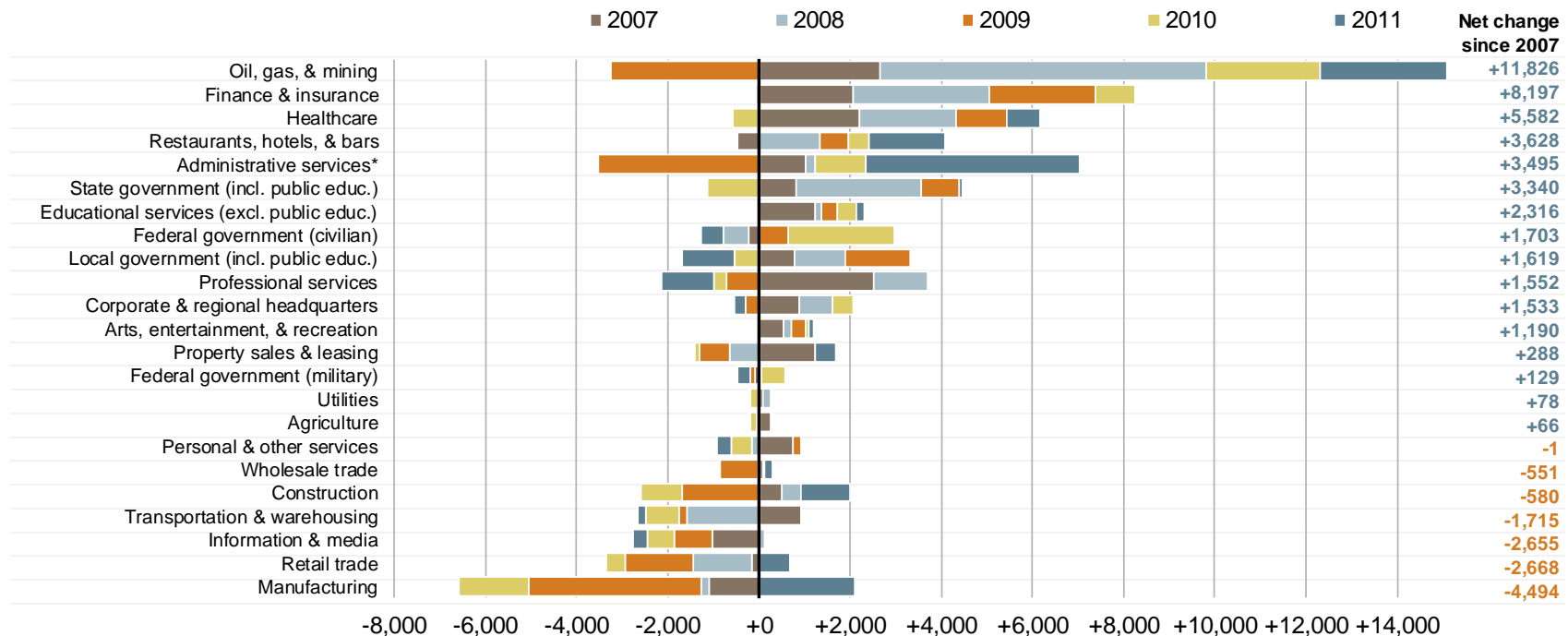
- Healthcare provides more jobs (74,000) than any other sector in the ACOG region, closely followed by *retail trade*. Other large sectors include *administrative services* and *restaurants, hotels & bars*.

Economy (cont'd)

- Over the last five years, the *oil, gas, & mining* sector has been the key driver for job growth within the ACOG region, experiencing a net increase of nearly 12,000 positions. This sector experienced a one-year loss in 2009 when energy prices collapsed following the recession.
- Several other sectors experienced severe job losses in 2009, including *administrative services, construction, retail trade, and manufacturing*. Administrative services and manufacturing, however, enjoyed strong job gains in 2011.
- Finance & insurance* and *healthcare* also appear to be major drivers for employment growth in the region with each having gained over 5,000 jobs apiece during the last five years.

ACOG region's 5-year net job growth by economic sector

Wide variation between industries with job gains and those with losses



*includes temporary & outsourced services

SOURCE: EMSI Complete Employment - 2011.4

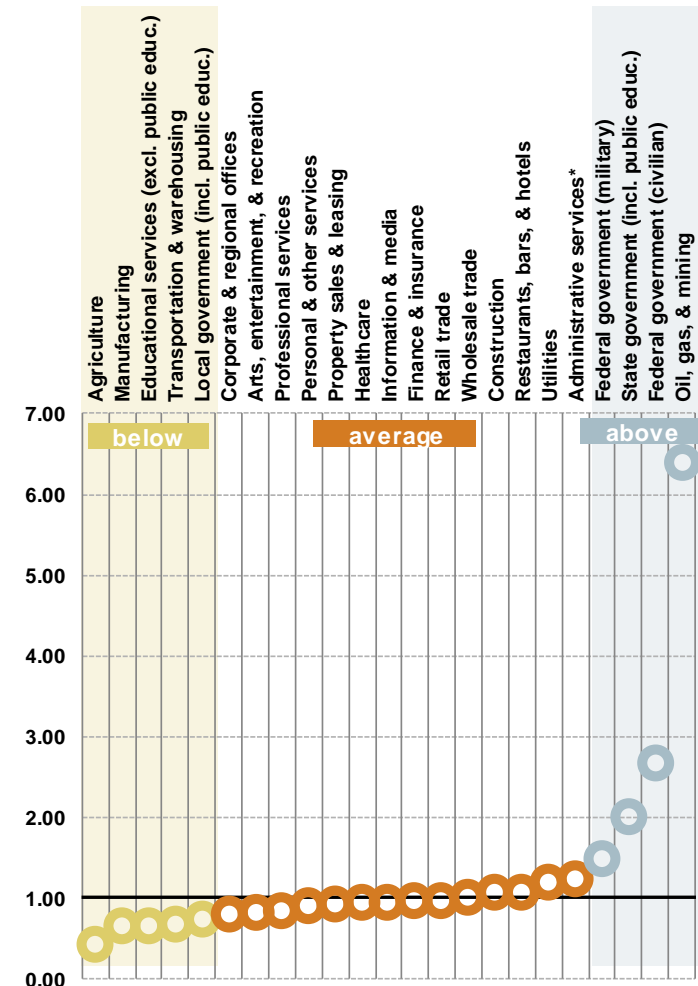
ACOG economic sector strengths relative to the US, 2011

Location quotient analysis

US average for each industry = 1.00

regional strength > 1.25

regional weakness < 0.75



*includes temporary & outsourced services

SOURCE: EM SI Complete Employment - 2011

Economy (cont'd)

- Location quotient analysis provides the ability to identify specialization within an economy. Typically, sectors with high LQs are considered export industries as they employ more workers than would be necessary in a local economy.
- By far, *oil, gas & mining* has the highest LQ (6.40) in the region. This means the sector employs nearly six-and-a-half times as many employees as would be expected, given national employment rates.
- Other high LQs include federal government (both civilian and military) and state government (including public education).
- Notably low LQs are in *manufacturing* and *transportation & warehousing*.

Understanding LQs

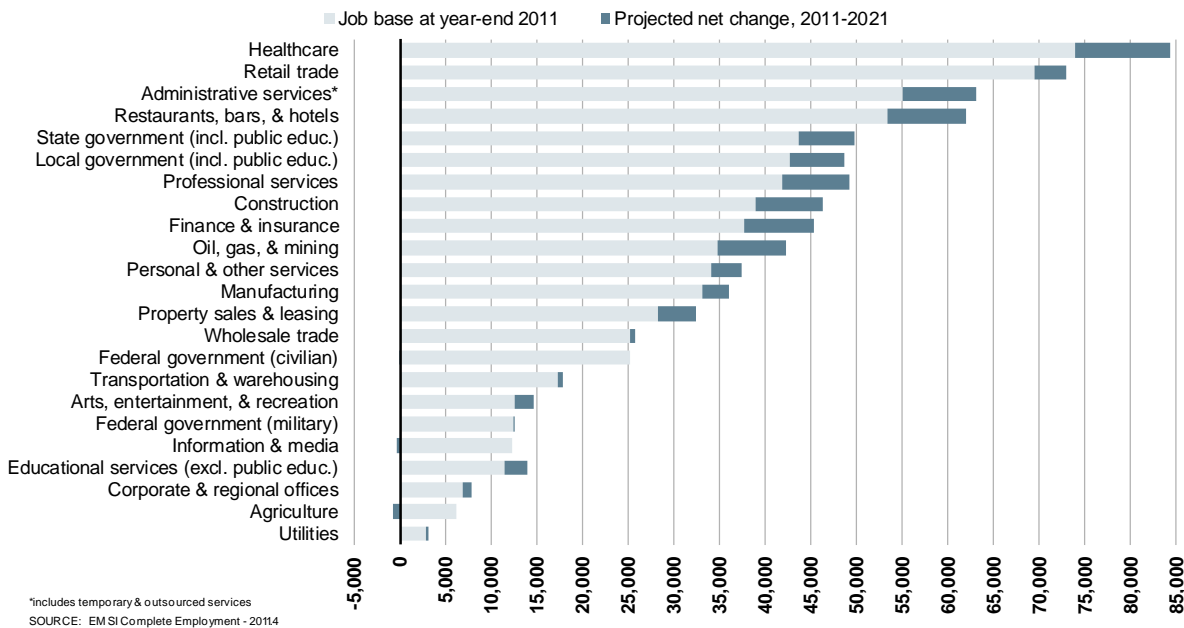
A location quotient (LQ) is calculated as a local sector's share of total local employment divided by the same sector's share of employment at the national level:

$$LQ = \frac{\text{Local jobs in sector} / \text{Total local jobs}}{\text{U.S. jobs in sector} / \text{Total U.S. jobs}}$$

If the local and national sectors are perfectly proportional, the location quotient will be 1.00. If a sector is heavily concentrated at the local level, then the location quotient will be higher than 1.00.

Conversely, if the sector is sparsely concentrated at the local level, the location quotient will be lower than 1.00.

ACOG region's outlook for jobs across economic sectors



Economy (cont'd)

- Already the largest employment sector in the region, *healthcare* is expected to see the greatest net increase in jobs over the next 10 years. According to forecasts provided by EMSI, the sector will experience a net increase of 10,300 jobs by 2021. This represents a 14 percent gain overall.
- Large gains in other key industries are forecast in *administrative services* (+8,100), *professional services* (+7,300), *finance & insurance* (+7,500) and *oil, gas & mining* (+7,500).
- Manufacturing* employment is projected to increase a modest nine percent (+2,900). Given that the number of jobs in this sector has decreased substantially—both nationally and regionally—over the last decade, this is a significant turnaround.

New utility patent grants by applicant

Data available only at the MSA level rather than the county level

	2006	2007	2008	2009	2010	2006-2010 Total
Oklahoma City MSA	148	136	111	100	120	615
University of Oklahoma	19	17	11	15	18	80
Halliburton Energy Services, Inc.	6	8	9	4	8	35
Seagate Technology, LLC	12	5	6	5	3	31
Stinger Wellhead Protection, Inc.		7	4	5	9	25
Oklahoma Medical Research Foundation	6	8	3		5	22
Wood Group Esp, Inc.	5	4	7	1		17
Innovalarm Corporation	3	2	2	5	2	14
York International Corp.	3	2	1	3	3	12
Tronox, LLC	3	7			1	11
Airfield Systems, LLC	1	2	1	2	1	7
Cameron International Corporation		1	1	1	4	7
Charles Machine Works, Inc.	2		2	1	2	7
Modular Services Company		1		1	4	6
Robbins & Myers Energy Systems, LP		1		1	3	5
Data Expedition, Inc.		2	1	1		4
Forhealth Technologies, Inc.	3	1				4
Renal Solutions, Inc.	2			1	1	4
Schlumberger Technology Corporation			1		3	4
Taylor Innovations, LLC	1	1	2			4
Weatherbank, Inc.	3	1				4
Kerr-Mcgee Chemical LLC	3					3
Little Giant Pump Company		1	2			3
Nanobiomedics, Inc.			1		2	3
Pelco Products, Inc.		1		2		3
Siwa Biotech Corporation	1		1	1		3
Valve Innovations, LLC	2	1				3
<i>individuals</i>	40	39	32	33	24	168
<i>all other organizations*</i>	33	24	24	18	27	126

*includes all other organizations with fewer than 3 patents over the 2006-2010 period

SOURCE: US Patent & Trademark Office (calendar year data)

Innovation

- Utility patents—patents that protect the function and utility of inventions (versus the design or appearance)—are another important indicator of innovation in a region.
- By far, the largest generator of innovation (as measured by patents) within the region is the University of Oklahoma with 80 granted from 2006 to 2010. Moreover, the affiliated Oklahoma Medical Research Foundation generated 22 patents during this period.
- Halliburton and Stinger Wellhead, both from the energy sector, were also issued a large number of new patents.
- Seagate Technology, which maintains its IT US Business Data Center in Oklahoma City, was granted the third highest number of patents in the region.

New utility patent grants by county of origin

	2006	2007	2008	2009	2010	2006-2010 Total
ACOG Region	139	128	99	93	111	570
Oklahoma County	68	67	48	46	51	280
Cleveland County	55	55	41	38	54	243
Canadian County	13	6	8	9	6	42
Logan County	3		2			5

SOURCE: US Patent & Trademark Office (calendar year data)

Innovation (cont'd)

- A sub-component of federal funds allocated are in the form of Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) awards, which provide important public sources of support for research and development.
- SBIR/STTR funding accounts for \$5.8 million dollars of federal funds obligated to the four county region. A look at awards granted by agency during the previous five year reveals that Health and Human Services (HHS) and the Department of Defense (DOD) comprise a majority of SBIR/STTR awards granted in the Oklahoma City area. Because this is an important source of financial support for many local companies, economic developers in the region should track changes in budgeting for the DOD and HHS closely to anticipate potential shifts in funding availability over time.

Aggregate of federal SBIR & STTR awards in the 4 ACOG counties

Data aggregated by year and by federal agency source

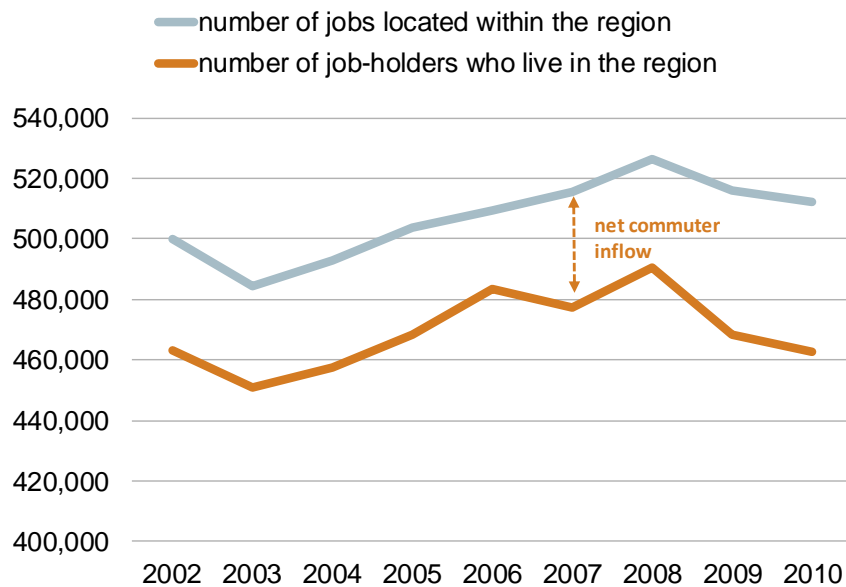
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	Agency Total
Annual \$ total	894,686	2,424,418	1,064,448	4,588,536	3,136,895	2,159,757	8,142,282	5,355,341	5,478,022	5,831,373	
HHS	548,665	1,036,976	275,000	1,252,163	1,183,349	1,034,544	2,454,171	2,666,130	4,577,300	3,113,969	18,142,267
DOD	199,462	1,287,442	544,728	2,036,645	1,123,546	559,213	5,528,111	2,319,319	675,722	1,868,325	16,142,513
AF	199,462	574,410	99,728	1,238,531	1,123,546	92,538	3,298,472	2,249,681	199,965	1,798,505	10,874,838
Army			70,000	798,114		69,972	729,734				1,667,820
Navy		614,073						69,638	475,757	69,820	1,229,288
MDA						100,000	750,000				850,000
DTRA						97,601	749,905				847,506
DARPA		98,959	375,000								473,959
SOCO						199,102					199,102
NSF		100,000	100,000	500,000		200,000		100,000	150,000	149,959	1,299,959
DOE				99,916	750,000			99,936		199,267	1,149,119
ED				99,812				100,000	75,000	499,853	774,665
NASA			69,720	600,000							669,720
USDA			75,000		80,000	296,000	160,000				611,000
EPA						70,000		69,956			139,956
DOT	96,659										96,659
DOC	49,900										49,900

Note: Includes the sum of Phase 1 and Phase 2 grants for each year shown

SOURCE: U.S. Small Business Administration, Technet

Net commuter flow into the ACOG region

More jobs within the region than employed residents*



Workforce

- A look at commuting patterns indicate that the four counties which comprise the ACOG region is an employment center for a much larger area.
- In 2010, the last year for which these data are available, the number of job holders living in the four counties was approximately 462,000 but the number of jobs physically located in the ACOG area was 512,000. As a result, almost 50,000 people commute in for employment.
- Trends for the last few years indicate this gap is growing; however, this may be a result of the recent recession.

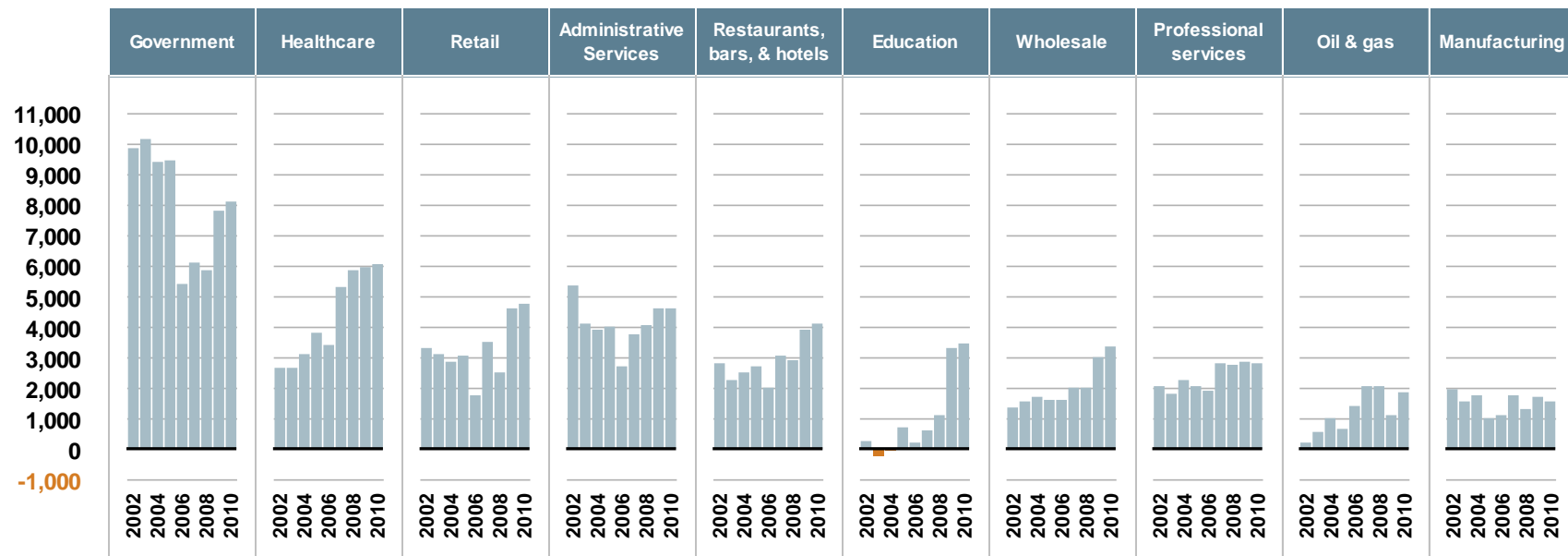
Workforce (cont'd)

- Government and healthcare are the two industry sectors that draw the most commuters from outside the region. While the number of government employees who commute has trended downward during the last decade, those working in the healthcare sector have increased substantially.
- Across most sectors, the number of commuters from outside the region has been increasing.

ACOG region's net commuter flow by selected economic sectors, 2002-2010

Industries that pull workers into the ACOG region for work

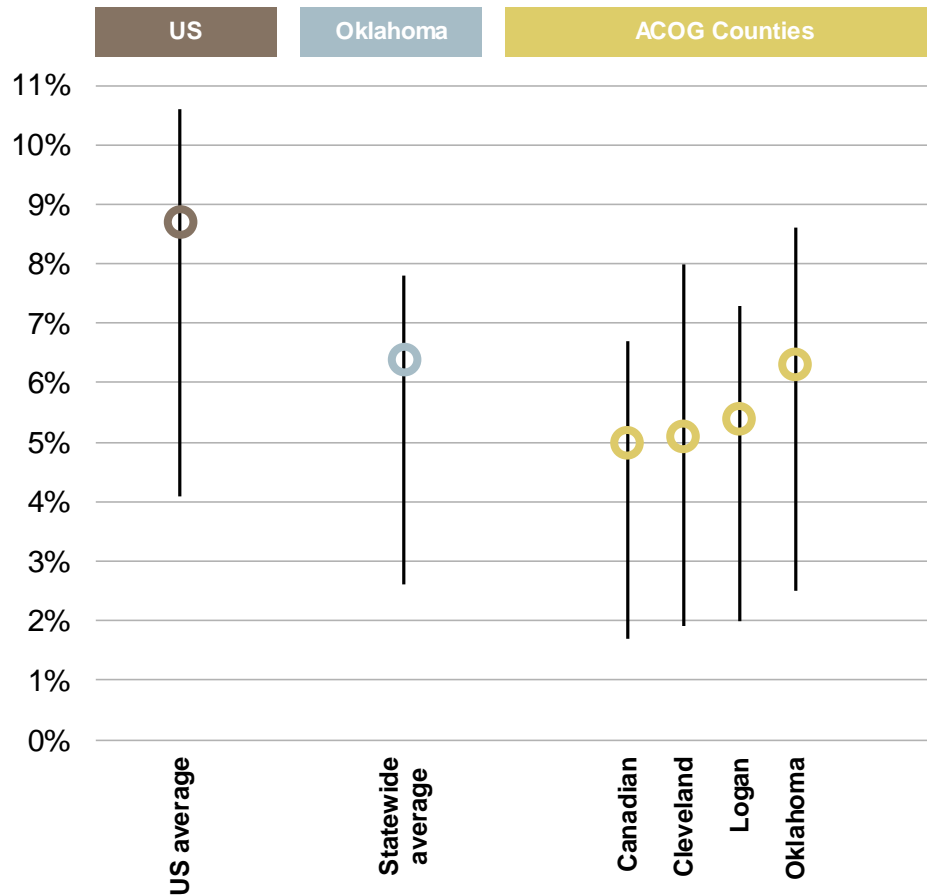
Total net commuter *inflow* (outflow)



SOURCES: U.S. Bureau of the Census, Local Employment Dynamics (LED) database, 2002-2010

Comparative unemployment rates

*Latest unemployment rate across the historical range of the past two decades**

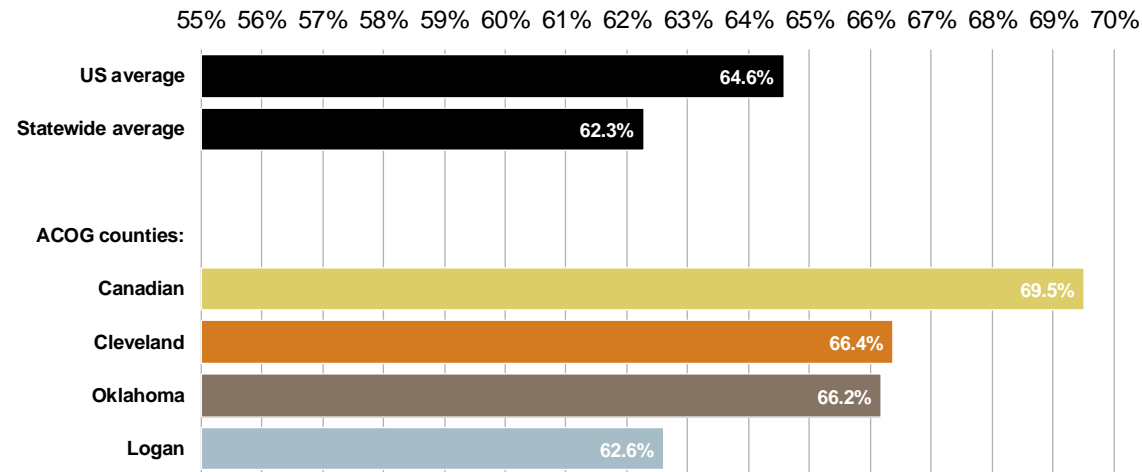


*NOTE: Monthly unemployment rates from January 1990 forward are not seasonally adjusted
 SOURCES: U.S. Bureau of Labor Statistics, LAUS series (and CPS series for US)

Workforce (cont'd)

- The unemployment rate in Oklahoma County is the highest within the ACOG region; however, this rate is slightly lower than the state as a whole and more than two percentage points lower than the nation.
- The rates for each of the four counties are all close to being near the middle of their 20-year historical ranges

Civilian labor force participation rates



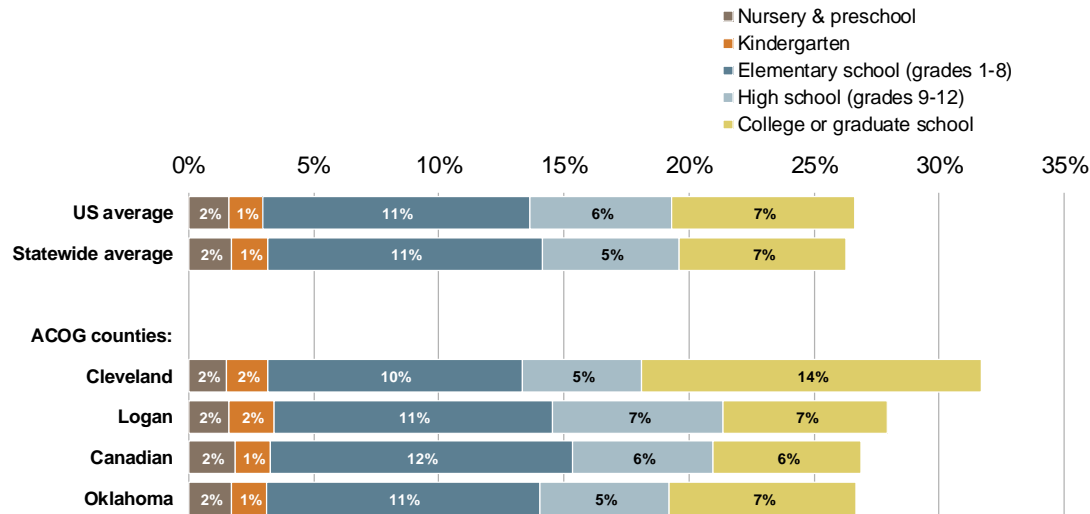
SOURCES: U.S. Census Bureau (American Community Survey, 2008-2010 average)

Workforce (cont'd)

- The labor force participation rate measures the share of adults who are working or seeking work.
- All four counties have a higher labor force participation rate than the state as a whole. Logan County is the only one, however, with a lower rate than the nation.

Current enrollment status

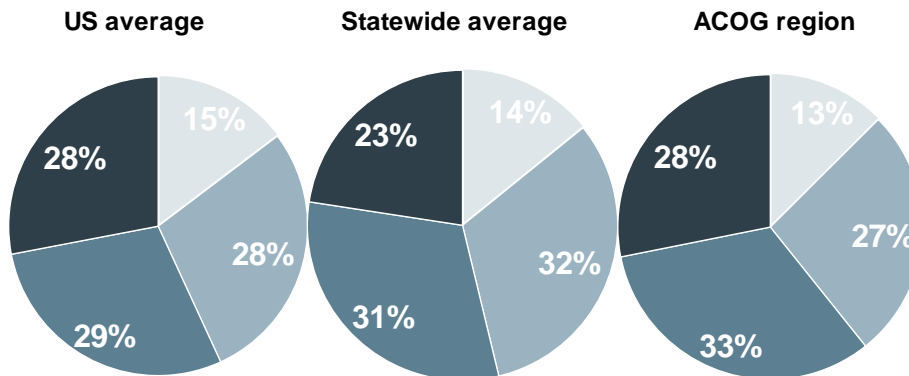
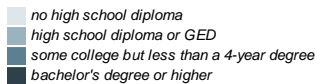
Share of the population enrolled in an educational program at any given level



SOURCES: U.S. Census Bureau (American Community Survey, 2008-2010 average)

Educational attainment

Highest level of education achieved by the population age 25 or older

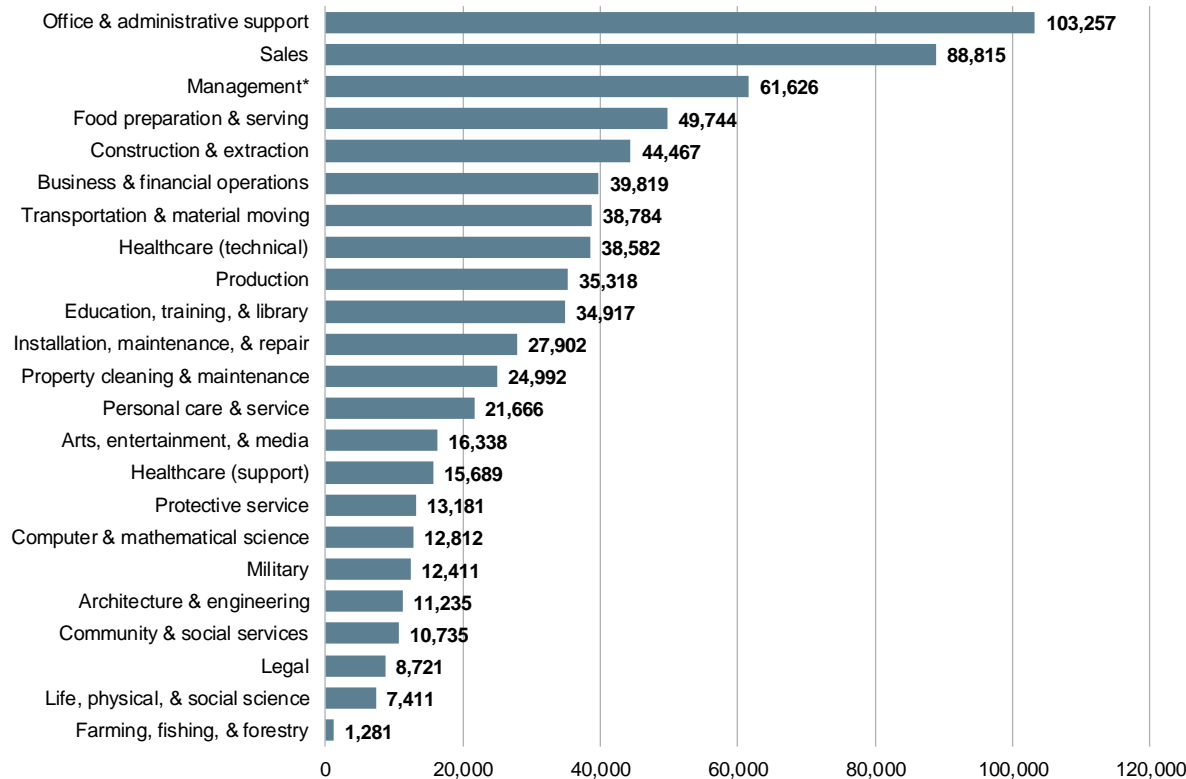


SOURCES: U.S. Census Bureau (American Community Survey, 2008-2010 average)

Workforce (cont'd)

- The share of the population within the ACOG region enrolled in school follows similar patterns to the state and nation with the notable exception of Cleveland County. Across the U.S. and Oklahoma, approximately seven percent of the population was enrolled in either college or graduate school in 2010. In Cleveland County, the share was 14 percent which obviously reflects the presence of the University of Oklahoma and its large student population.
- While the state lags the U.S. by a wide margin in the share of its adult population who has earned at least a bachelor's degree, the ACOG region matches the national rate.
- Moreover, the four county area also enjoys a larger share of its population who have had some college experience and a lower percent have not earned a high school diploma.

ACOG job base by occupational group, 2011



*NOTE: Self-employed agricultural workers are often classified as "farm managers" and may be grouped under management occupations rather than farming.

SOURCE: EMI Complete Employment - 20114

Occupations

- Industry sector data describe the activities of individual companies. By contrast, these occupational data indicate the activities of the employees within those companies. For example, a manufacturing firm employs not only *production* workers but also *management* and *office & administrative support* personnel.
- Over 100,000 jobs in the ACOG region are classified as *office & administrative support*. Combined with *management* and *business & financial operations*, over 200,000 jobs in the region could be considered white collar.
- Approximately 55,000 healthcare occupations — both technical and support — are located within the region.

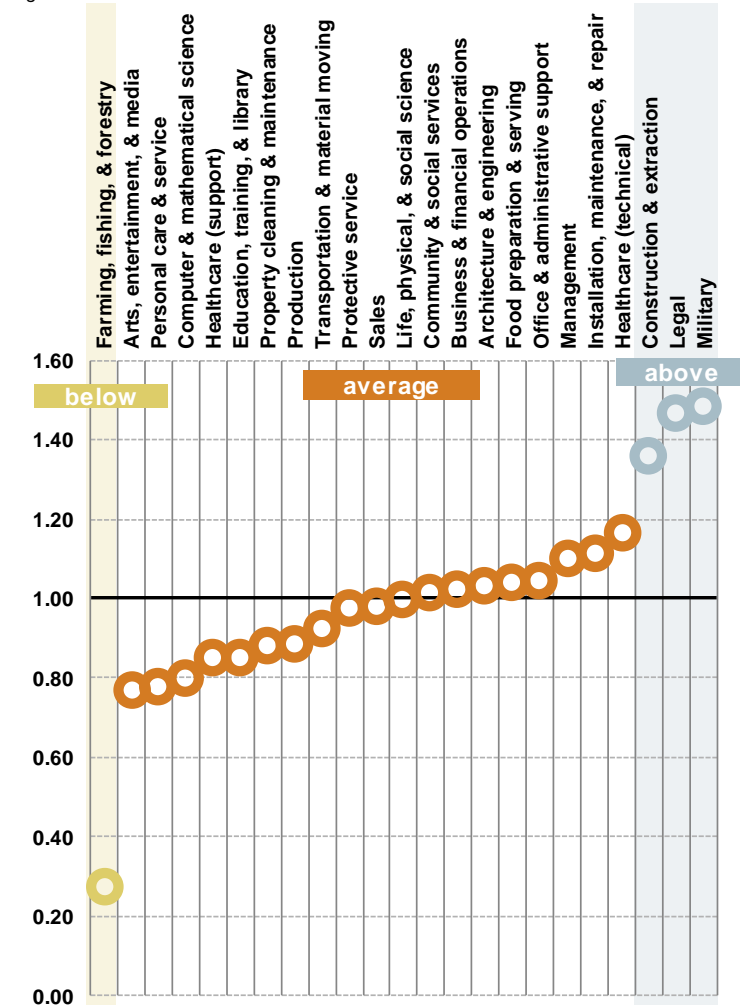
ACOG occupational strengths relative to the US

Location quotient analysis

US average for each industry = 1.00

regional strength > 1.25

regional weakness < 0.75



SOURCE: EMSI Complete Employment - 20114

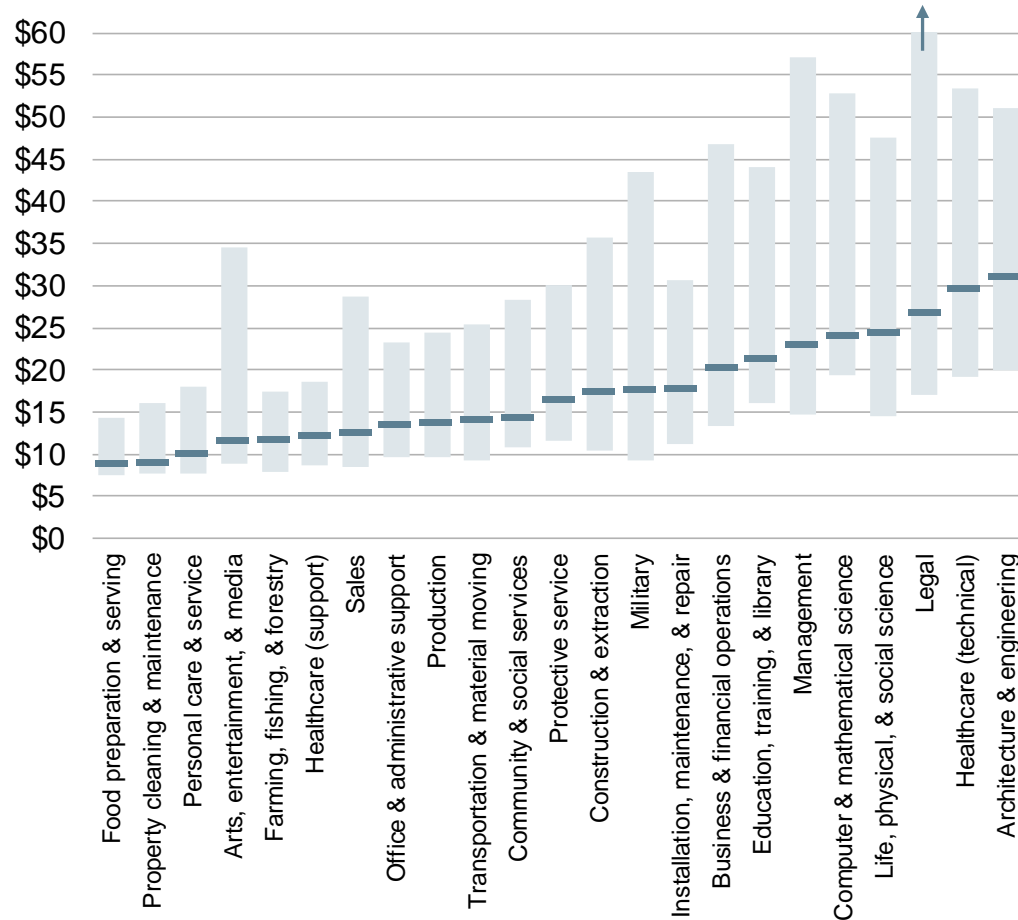
Occupations (cont'd)

- Location quotient analysis can also be applied to occupational data to determine specializations within a regional labor market.
- Three occupational groups have a much higher than average concentration within the region: *military*, *legal*, and *construction & extraction*. These reflect the location of Tinker AFB, the state capitol, and a large oil and gas industry presence.
- While the *healthcare (technical)* occupational group's LQ does not rise above 1.25, the chart to the left indicates that a higher than average concentration of jobs within this field are present. Notably, *healthcare (support)* occupations are relatively low.
- The LQ for computer & mathematical science jobs is also low. This may imply that expanding and/or relocating IT-related companies could find it a challenge to find local talent and would, therefore, need to import workers from elsewhere.

Median hourly wage rate by occupational group

ACOG median wage presented in the context of the national wage range

Horizontal dash represents the regional median; vertical column represents the national range between the 10th and 90th percentiles



SOURCE: EMSI Complete Employment - 20114

Occupations (cont'd)

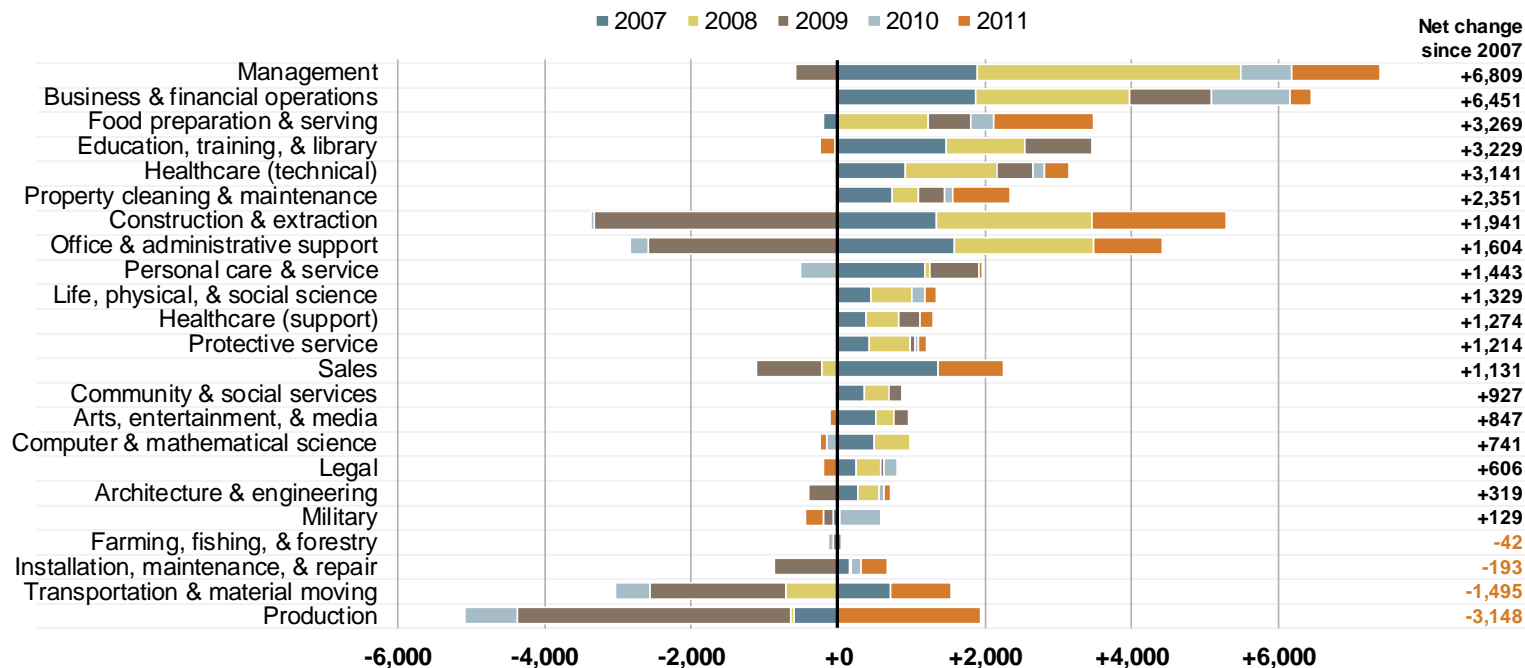
- Generally, the wages for occupations in the ACOG region pay at the lower end of the national wage scale.
- The highest paid occupational group in the region is *architecture & engineering*. This is likely a reflection of the strong presence of oil and gas companies in the Oklahoma City area, as *legal* professions typically pay the highest salaries.
- While computer & mathematical science jobs rank among the top five paying occupations in the area, the average local salary falls close to the bottom of the national wage scale. Competition among companies and regions for these workers is unusually fierce as they are in high demand nationally. The low wages offered in the Oklahoma City area will likely present a challenge in the recruitment of these talented professionals.

Occupations (cont'd)

- Management and business & financial operations were, by far, the leading growth occupations in the region over the last five years. Combined, these two categories accounted for a net increase of 13,000 positions.
- During 2009, the occupations which experienced the greatest declines were production, construction & extraction, office & administrative support, and transportation & material moving. These occupations tend to be concentrated in the industry sectors that experienced the greatest number of job losses in the recent recession: construction, manufacturing, transportation/warehousing, and professional services.

ACOG Region's 5-year net job growth by occupational group

Job losses in 2009 were concentrated in a few hard-hit occupational groups

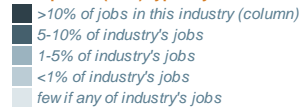


SOURCE: EMSI Complete Employment - 2011.4

Correlations between selected industries & ACOG occupations

Understanding occupational needs is often overlooked in the selection of target industries. This analysis, which merges 30 occupations specific industries within targets, indicates anticipated job growth, current concentration, wages, and educational requirements for each.

occupation (row) typically accounts for:



Selected US industries ►

▼ Selected occupations in the ACOG region	2011 Jobs	2011-2021 Net Chg	2011 LQ	2011 Median Wage	Educational Attainment	Aerospace & Aviation	Energy	IT	Life Sciences	Logistics & Distribution	General R&D
53-3032 Heavy & Tractor-Trailer Truck Drivers	8,255	+421	0.98	\$18.41	Short-term on-the-job training						
49-9041 Industrial Machinery Mechanics	1,846	+359	1.51	\$20.00	Long-term on-the-job training						
49-3011 Aircraft Mechanics & Service Technicians	1,738	+149	3.66	\$24.66	Postsecondary vocational aw ard						
51-4041 Machinists	1,562	+137	0.94	\$16.77	Long-term on-the-job training						
11-9111 Medical & Health Services Managers	1,454	+131	1.08	\$30.78	Degree plus work experience						
11-3021 Computer & Information Systems Managers	1,174	+143	0.89	\$38.41	Degree plus work experience						
17-2072 Electronics Engineers, Except Computer	1,129	-16	1.94	\$41.66	Bachelor's degree						
17-2171 Petroleum Engineers	1,105	+405	8.63	\$42.47	Bachelor's degree						
11-3051 Industrial Production Managers	999	+89	1.61	\$26.63	Work experience in a related field						
19-2042 Geoscientists	997	+202	5.61	\$41.38	Master's degree						
17-2051 Civil Engineers	852	+111	0.72	\$32.56	Bachelor's degree						
11-9041 Architectural & Engineering Managers	791	+60	1.07	\$48.02	Degree plus work experience						
17-2071 Electrical Engineers	613	+24	0.96	\$34.10	Bachelor's degree						
17-2141 Mechanical Engineers	564	+51	0.56	\$34.25	Bachelor's degree						
11-3071 Transportation, Storage, & Distribution Managers	437	-19	0.97	\$26.48	Work experience in a related field						
17-2112 Industrial Engineers	421	+105	0.46	\$29.33	Bachelor's degree						
49-2091 Avionics Technicians	392	+66	5.27	\$22.26	Postsecondary vocational aw ard						
19-2041 Environmental & Health Scientists & Specialists	281	+46	0.74	\$20.50	Master's degree						
15-2031 Operations Research Analysts	259	+41	1.00	\$28.34	Master's degree						
17-2011 Aerospace Engineers	258	-1	0.82	\$40.52	Bachelor's degree						
19-1042 Medical Scientists, Except Epidemiologists	258	+65	0.54	\$22.44	Doctoral degree						
17-2061 Computer Hardware Engineers	236	-1	0.83	\$46.70	Bachelor's degree						
17-2151 Mining & Geological Engineers	211	+71	4.07	\$21.42	Bachelor's degree						
49-9062 Medical Equipment Repairers	194	+45	1.02	\$16.58	Associate's degree						
11-9121 Natural Sciences Managers	176	+25	0.90	\$32.67	Degree plus work experience						
51-4111 Tool & Die Makers	160	+9	0.51	\$22.90	Long-term on-the-job training						
19-2031 Chemists	128	+6	0.39	\$30.53	Bachelor's degree						
19-2021 Atmospheric & Space Scientists	127	-4	2.98	\$47.25	Bachelor's degree						
17-2111 Health & Safety Engineers	126	+10	1.23	\$24.15	Bachelor's degree						
15-2041 Statisticians	101	+5	0.96	\$18.41	Master's degree						
17-2081 Environmental Engineers	93	+14	0.43	\$40.17	Bachelor's degree						
19-1099 Life Scientists, All Other	81	+7	1.55	\$24.67	Bachelor's degree						
19-1029 Biological Scientists, All Other	73	+7	0.53	\$27.72	Doctoral degree						
17-2131 Materials Engineers	56	+7	0.57	\$33.80	Bachelor's degree						
51-9082 Medical Appliance Technicians	51	-4	0.85	\$16.83	Long-term on-the-job training						

SOURCE: EMSI Complete Employment - 2011/4; US Bureau of Labor Statistics, Industry/Occupation Matrix

III. Target Sector Profiles

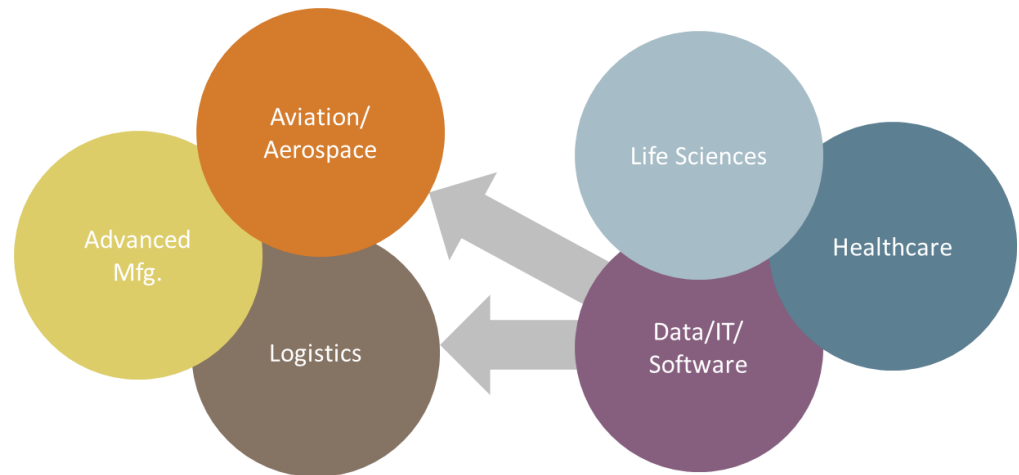
The selection of target sectors is traditionally bound to an assessment of only a few determinant factors, such as access to an available workforce, industrial sites, and incentives. Our target industry recommendations are not based solely on these factors, but also on conversations with regional economic development leaders to better understand potential opportunities and challenges that might not be identified from secondary data sources alone.

TIP also brings to bear its understanding and appreciation of broader socioeconomic trends such as consumption patterns/consumer spending, emerging markets/international trade, and demographic shifts/aging workforce to better understand long-term recruitment and development prospects within emerging economic sectors. Finally, TIP also strongly took into consideration how the following targets fit within the overall framework of the strategic plan and how they will affect central Oklahoma's ability to attract talent to the area.

In sum, TIP identified target industries for central Oklahoma using a three-pronged approach: quantitative, qualitative, and strategic.

Recommend regional targets

Six sectors identified by TIP Strategies as recruitment prospects



Source: TIP Strategies

TARGET | Data/Software/IT

Potential niches: weather, risk management, forecast modeling, storage, energy support, logistics management, electronic medical records, health informatics

DESCRIPTION & OVERVIEW

The broadly defined data, software, and IT services sector encompasses a wide range of activities, including publishing and broadcasting. The data management component of this sector includes shared service centers, corporate and technical services, data storage and processing, as well as more basic business support services, such as contract telephone call center operations. This includes firms that provide data management and support services to companies, hospitals, governments, and individuals.

Over the next decade, software development and data processing services are projected to be the leaders in job-creation within this sector. Software firms are expected to add nearly 70,000 jobs in the US over the next decade while data processing services will pick up about 116,000 jobs in activities like business process outsourcing (BPO), financial transaction processing, and data server farms.

TRENDS

The Data/Software/IT sector is projected to grow 32.9% in the region over the next decade, as compared with 29.9% nationally. Compared to the nation, wages are relatively low (\$56,469 vs. \$97,650), which may give the region a site selection advantage if the talent is comparable to another site.

There are major differences between the software and data management industries. Like the oil refineries and chemical facilities of the industrial era, today's data center activities require massive capital investments on the ground but relatively few workers to operate. Software firms are the opposite. They invest little capital into property, plant, and equipment. Instead, the assets of software firms lie in two areas: their intellectual property and their coveted pools of talented workers. Corporate decisions of software firms will be based on their ability to preserve, nurture, and develop these two assets.

FACTS

Establishments	481
Jobs Multiplier	2.22
Jobs (2011)	6,260
% Growth (2011-2021)	32.9%
% Growth (2011-2021) <i>National</i>	29.9%
LQ	0.59
Av. EPW (2011)	\$56,469
Av. EPW (2011) <i>National</i>	\$97,650

REGIONAL TRENDS

	2011 Jobs	2021 Jobs	% Growth
Regional	6,260	8,320	32.9%
National	2,595,104	3,372,228	29.9%

Source: EMSI Complete Employment - 2012.1



TARGET | Data/Software/IT (continued)

CHALLENGES & BARRIERS

- Highly defined skillsets are required for the software cluster and these skills may be in relatively short supply.
- Central Oklahoma's small employment base within this sector and relatively low wage rates will make it difficult to recruit talent. As a result, the region will likely need to pursue a "grow your own" strategy.
- Globalization has increased the competitive playing field of technology services, including business process outsourcing (BPO).
- Because business assets lie in intangible property, software firms will require local legal services that are sophisticated and highly specialized in intellectual property and (increasingly) international law.

OPPORTUNITIES & ASSETS

- Leverage existing strengths tied to the National Weather Center at the University of Oklahoma.
- Certain types of IT services will be major US job generators in the decade ahead.
- Data processing facilities can sometimes produce large capital investments and yield sizable property tax revenues for local communities.
- Software firms typically place less emphasis on real estate than on labor availability (and quality of life to minimize the incentive for talented employees to relocate to larger labor markets.)
- The market for software products continues to expand in the US and globally

REGIONAL BUSINESSES

Employer Name	Industry	Local Employees
A La Mode Inc.	Software Publishers (511210)	281
Advancia Corp.	Custom Computer Programming Services (541511)	130
Centerpointe Resources	Data Processing, Hosting, and Related Services (518210)	70
Cox Business Services	Data Processing, Hosting, and Related Services (518210)	65
Dynamics Research Corp.	Custom Computer Programming Services (541511)	60

TARGET | Life Sciences

Potential niches: pharmaceuticals and medical research

DESCRIPTION & OVERVIEW

The life sciences industry is broadly defined. It encompasses establishments "engaged in conducting research and experimental development in the physical, engineering, and life sciences, such as agriculture, electronics, environmental, biology, botany, biotechnology, computers, chemistry, food, fisheries, forests, geology, health, mathematics, medicine, oceanography, pharmacy, physics, veterinary, and other allied subjects."

The sector represents almost 5,331 jobs in 2011 and is projected to grow 14.2% over the next decade. Wages are much lower than the national averages (\$72,917 vs. \$101,004) which may be a positive talking point for large-scale relocations. Projected growth over the next decade tracks with the nation.

TRENDS

The life sciences sector is marked by rapid innovations producing increasingly effective treatments for ailments through medicine and medical devices. Profitability in this sector depends on the ability of companies to discover and market new products. While large companies focus on economies of scale in researching, manufacturing, and marketing products, smaller life sciences firms compete more effectively by focusing on specialization. As a result of rising R&D costs, most life science companies are now focusing efforts on the treatment of chronic conditions rather than acute diseases due to their larger patient populations. Climbing healthcare costs have also been a primary driver in the rise of generic drug manufacturers who can produce lower cost alternatives to widely prescribed and proven drugs that are no longer protected by patents. Life cycles are relatively short because drug and device makers are continually developing faster and cheaper improvements. As a result of these influences, life sciences companies that are on the leading edge of developing new products tend to be located near biotechnology and medical research clusters

FACTS

Establishments	301
Jobs Multiplier	2.43
Jobs (2011)	5,331
% Growth (2011-2021)	14.2%
% Growth (2011-2021) <i>National</i>	16.2%
LQ	0.77
Av. EPW (2011)	\$72,917
Av. EPW (2011) <i>National</i>	\$101,004

REGIONAL TRENDS

	2011 Jobs	2021 Jobs	% Growth
Regional	5,331	6,089	14.2%
National	1,700,177	1,974,772	16.2%

Source: EMSI Complete Employment - 2012.1



TARGET | Life Sciences (continued)

CHALLENGES & BARRIERS

- The life sciences sector is a heavily regulated industry.
- Profits for life sciences companies are dependent on patent protection. Prices for products usually plummet once that protection is lost, such as when generic drug alternatives become available.
- Large drug companies typically spend more than 15 percent of their revenues on R&D, a very high ratio, but without any certainty that profitable new products will result. Most new candidate drugs eventually prove unsuitable and are abandoned.

OPPORTUNITIES & ASSETS

- Access to university-based R&D and research hospitals is becoming an increasingly critical factor for life sciences firms, which allows for the blending of R&D and commercialization.
- Leverage existing research strengths of OU Medical Center, including cancer and diabetes.
- Access to Oklahoma Medical Research Foundation.

REGIONAL BUSINESSES

Employer Name	Industry	Local Employees
Kimray Inc.	Pump and Pumping Equipment Manufacturing (333911)	520
Little Giant Pump Co.	Pump and Pumping Equipment Manufacturing (333911)	300
OU Medical Center Laboratory	Medical Laboratories (621511)	200
Astellas Pharma Technologies	Pharmaceutical Preparation Manufacturing (325412)	180

TARGET | Healthcare

General medical and healthcare services, outpatient and ambulatory services

DESCRIPTION & OVERVIEW

Excluding peripheral activities like health insurance, pharmaceuticals, biotechnology, and medical device manufacturing, core healthcare services alone are expected to grow by nearly 4 million jobs between now and 2020. Much of this expansion will occur naturally through population growth and age-related demand as American Baby Boomers begin to cross the threshold into their senior years. Other aspects of growth will be structural as this sector continues to provide services in new ways.

The healthcare sector accounts for nearly 62,000 jobs (2011) in the region. With growth projected at 16.1% over the next decade, the region will lag the nation in healthcare employment but the sector will remain an important driver of the local economy. Average earnings per worker are on par with national averages, which should make the region competitive to highly skilled talent.

TRENDS

Throughout the recent recession the healthcare sector proved to be a remarkably stable employer. Healthcare was one of the few sectors of the economy (along with education) that managed to eke out job gains even as the national unemployment rate soared above 10%. Another striking difference between healthcare and the other targets is the gender balance in the industry. While manufacturing and distribution have historically provided male-oriented employment, the jobs in the healthcare sector have historically been staffed by women. In terms of skill level, the healthcare sector offers a broader range of jobs than most of the other targets. This industry provides large numbers of good-paying jobs with no more than a 2-year degree.

FACTS

Establishments	2,974
Jobs Multiplier	2.05
Jobs (2011)	61,984
% Growth (2011-2021)	16.1%
% Growth (2011-2021) <i>National</i>	22.4%
LQ	0.97
Av. EPW (2011)	\$56,690
Av. EPW (2011) <i>National</i>	\$57,601

REGIONAL TRENDS

	2011 Jobs	2021 Jobs	% Growth
Regional	61,984	71,957	16.1%
National	15,613,144	19,105,657	22.4%

Source: EMSI Complete Employment - 2012.1



TARGET | Healthcare *(continued)*

CHALLENGES & BARRIERS

- Uncertainty surrounding the implementation of the The Patient Protection and Affordable Care Act and its long-term effects.
- There will be cost pressure in the years ahead for healthcare providers to centralize and consolidate services. There may be opportunities for one or more larger communities in the region to emerge as regional healthcare hubs, providing senior and rural services

OPPORTUNITIES & ASSETS

- Leverage strength of existing hospitals as well as region's status as population center for the state.
- Access to OU Health Science Center, which provides steady stream of physicians.
- The aging US population will drive growth in the healthcare sector.
- Healthcare is relatively well insulated from economic cycles.
- By targeting senior and geriatric healthcare services, the region can get in front of a growing trend.

REGIONAL BUSINESSES

Employer Name	Industry	Local Employees
Integrus Baptist Medical Center	General Medical and Surgical Hospitals (622110)	10,000
OU Medical Center	General Medical and Surgical Hospitals (622110)	4,000
Mercy Health Center	General Medical and Surgical Hospitals (622110)	3,426
Norman Regional Hospital	General Medical and Surgical Hospitals (622110)	2,900
Children's Hospital of Oklahoma	General Medical and Surgical Hospitals (622110)	2,900

TARGET | Logistics & Distribution

DESCRIPTION & OVERVIEW

Logistics and supply chain establishments provide materials-handling services and manage the flow of goods as they move from supplier to manufacturer to retailer and final consumer. These companies use information technology to manage inventory control and costs. For some firms, especially chain retailers, this is done in-house. For others, third-party logistics, or 3PL, provide many of these services, including assembling and repackaging materials, consolidating orders and shipments, physically delivering goods to customers, processing returned items, and handling e-commerce fulfillment operations. 3PLs typically serve a number of clients from a single facility.

The logistics/distribution sector employs a large labor force nationwide. The sector represents 8,433 jobs (2011) in the region and is projected to grow three percent over the next decade. This growth rate lags projected growth rates at the national level, at 12.6 percent. Earnings per worker are on par with the national average. This suggests an opportunity for the region to attract additional logistics and distribution operations as the industry as a whole expands over the next decade.

TRENDS

The scale of distribution centers keeps growing. Large modern warehouses can exceed 1 million square feet.

Sustainability issues are expected to continue to shape the industry. Concerns about the regulation of carbon emissions, volatility in the cost of fuel, and growing demand for more eco-friendly products will continue to reshape the logistics industry in the coming decade. Growth in “reverse logistics” (the movement of goods back through the supply chain due to customer returns or for recycling or disposal) is expected to continue.

Technology will continue to advance the industry. Supply chain management is increasingly reliant on sophisticated software and technologies such as radio frequency identification (RFID) tags and fleet tracking via GPS. As the industry's needs become more specialized, training requirements are likely to increase.

FACTS

Establishments	481
Jobs Multiplier	1.98
Jobs (2011)	8,433
% Growth (2011-2021)	3.0%
% Growth (2011-2021) <i>National</i>	12.6%
LQ	0.68
Av. EPW (2011)	\$48,969
Av. EPW (2011) <i>National</i>	\$49,470

REGIONAL TRENDS

	2011 Jobs	2021 Jobs	% Growth
Regional	8,433	8,684	3.0%
National	3,049,007	3,433,866	12.6%

Source: EMSI Complete Employment - 2012.1



TARGET | Logistics & Distribution *(continued)*

CHALLENGES & BARRIERS

- The recent recession left a glut of distribution space in the US. As of mid-2010, national brokerage firm Grubb & Ellis estimated the industrial vacancy rate above 10 percent for the fifth consecutive quarter. It will take the industry a while to consume this inventory before a new construction boom begins.
- The industry's exemplary efficiency standards means that large capital investments may sometimes yield relatively few jobs.
- Like manufacturing, capital investments in logistics & distribution facilities can be big boosts to property tax revenues; the difference is that -- unlike manufacturing -- these large capital investments may sometimes be associated with relatively few new jobs.
- Few industrial-zoned parcels with good transportation connections are necessary. Many logistics facilities today exceed 1 million square feet, with sites generating high volumes of ingress and egress.

OPPORTUNITIES & ASSETS

- Central location within the U.S.
- Labor force availability is a plus, and wages remain competitive.
- Intermodal transportation provides the infrastructure for the logistics/distribution industry to function. Central Oklahoma lies at the intersection of two interstates and is serviced by multiple rail carriers.
- A steady, uninterrupted supply of affordable electricity is needed to support large climate-controlled facilities that utilize IT networks 24/7.

REGIONAL BUSINESSES

Employer Name	Industry	Local Employees
CRST Inc.	Specialized Freight (except Used Goods) Trucking, Long-Distance (484230)	500
Pam Transport Inc.	Specialized Freight (except Used Goods) Trucking, Long-Distance (484230)	400
180 Business Solutions	Process, Physical Distribution, and Logistics Consulting Services (541614)	300
Modular Services Co.	General Warehousing and Storage (493110)	200
Western Express Inc.	Specialized Freight (except Used Goods) Trucking, Long-Distance (484230)	165

TARGET | Aerospace/aviation

Potential niches: Assembly of parts, sensors, radar, navigation equipment

DESCRIPTION & OVERVIEW

Aviation-related activities include the manufacture of aircraft, engines, parts, and auxiliary equipment. The industry also includes establishments engaged in servicing, repairing, rebuilding, maintaining, and storing aircraft. The U.S. aerospace industry has suffered a volatile past decade, including a major terrorist attack, two national recessions, and a huge run up in fuel costs. While these events caused great turmoil in passenger services and adversely affected demand for new orders, ongoing global conflicts resulted in an increase in global military aerospace spending.

The aerospace industry accounted for 2,815 jobs in 2011 and is projected to grow at 18.1% over the next decade. This projected growth rate is significant—more than twice the national rate of 7.5%—and represents a significant opportunity for the region. Wages trail the nation (\$76,552 vs. \$97,191) which could attract companies to relocate to the region in the future in order to decrease their operating costs.

TRENDS

Prior to the recession, an increasing number of businesses, both large and small, invested in smaller corporate aircraft to serve the needs of their executives and traveling workforce. This, in turn, drove up the demand for parts, services, and airports that cater to meeting the needs of these customers. The Great Recession, however, hit the general aviation industry hard. In 2010, US manufacturers of general aviation aircraft recorded the third successive year of decline. General aviation products followed the same trend. The General Aviation Manufacturers Association remains optimistic, however, as signs of recovery have emerged. The FAA, too, remains optimistic in their long-term outlook of the industry. The structure of the aerospace industry has evolved over the past decade. Manufacturing patterns, work force challenges, trade battles and travel habits continue to keep aerospace firms cautious about site and facility decisions. One response by Boeing and other manufacturers to these challenges has been to rely more heavily on the outsourcing of not only the manufacture, but also the design of parts and equipment to be used in final assembly.

FACTS

Establishments	94
Jobs Multiplier	2.49
Jobs (2011)	2,815
% Growth (2011-2021)	18.1%
% Growth (2011-2021) <i>National</i>	7.5%
LQ	0.77
Av. EPW (2011)	\$76,552
Av. EPW (2011) <i>National</i>	\$97,191

REGIONAL TRENDS

	2011 Jobs	2021 Jobs	% Growth
Regional	2,815	3,325	18.1%
National	891,677	958,804	7.5%

Source: EMSI Complete Employment - 2012.1



TARGET | Aerospace/aviation (*continued*)

CHALLENGES & BARRIERS

- Vulnerability of Tinker AFB to potential cuts in federal funding due to large deficits.

OPPORTUNITIES & ASSETS

- Strong existing cluster of aerospace-related activities thanks to presence of Tinker AFB and growth at Boeing.
- Central US location and proximity to Dallas/Fort Worth.
- Long history in aviation.
- Collaboration potential with higher education institutions, including OU.

REGIONAL BUSINESSES

Employer Name	Industry	Local Employees
Tinker Air Force Base	Other Aircraft Parts and Auxiliary Equipment Manufacturing (336413)	22,000
AAR Corp.	Other Support Activities for Air Transportation (488190)	800
AAR Aircraft Services Inc.	Aircraft Engine and Engine Parts Manufacturing (336412)	500
Capital Aviation Inc.	Other Support Activities for Air Transportation (488190)	75
Engineering Management Concepts	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (334511)	65

TARGET | Advanced Manufacturing

DESCRIPTION & OVERVIEW

Advanced manufacturing is not a specific process or product; rather, it is an overall philosophy that stresses constant improvement in efficiency. Companies considered to be advanced manufacturing utilize “advanced manufacturing technologies” (AMTs) to achieve heightened levels of efficiency. Advanced Manufacturing Magazine defines AMTs as “new manufacturing techniques and machines combined with the application of information technology, microelectronics and new organizational practices within the manufacturing sector.”

In the region, this sector accounted for over 10,000 jobs in 2011. While growth is projected to remain fairly low (2.3%), relative to the nation (projected to decline 9.4%) the sector is very healthy locally. Average earnings per worker trail the nation (\$63,394 vs. \$96,983), presenting an opportunity for the region to attract jobs from areas of the country where labor is more expensive.

TRENDS

Over the next 10 years, forecasts show that the US manufacturing sector will shrink by 9.4%. This is misleading for several reasons. First, most of these losses are front-loaded as this sector may take a while to bounce back from a disastrous recession. Second, job losses have already occurred even as advancements in products and processes have resulted in productivity gains and higher profits for manufacturers. And third, job losses among inefficient labor-intensive manufacturing activities (like apparel) have masked gains in other sectors (like advanced materials and medical equipment). The bottom line is clear: manufacturing holds opportunities for expansion, but the niches must be carefully selected.

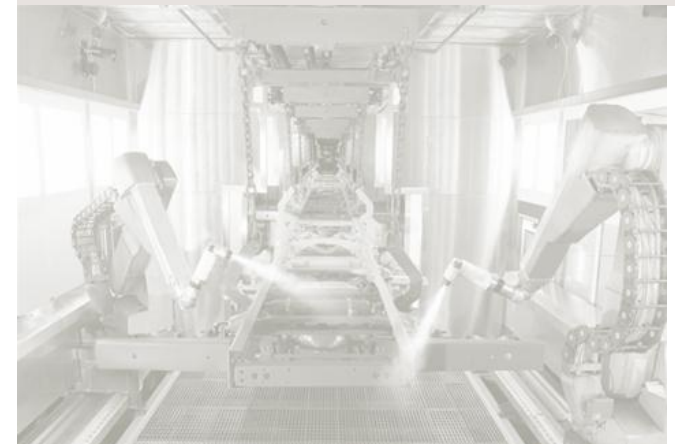
FACTS

Establishments	218
Jobs Multiplier	2.84
Jobs (2011)	10,044
% Growth (2011-2021)	2.3%
% Growth (2011-2021) <i>National</i>	-9.4%
LQ	0.74
Av. EPW (2011)	\$63,394
Av. EPW (2011) <i>National</i>	\$96,983

REGIONAL TRENDS

	2011 Jobs	2021 Jobs	% Growth
Regional	10,044	10,276	2.3%
National	3,316,749	3,004,077	-9.4%

Source: EMSI Complete Employment - 2012.1



TARGET | Advanced Manufacturing *(continued)*

CHALLENGES & BARRIERS

- Limited number of large industrial sites.
- US manufacturers often cite difficulty in finding and recruiting workers with engineering and technical skills. This can present challenges for attracting employers to areas with a limited manufacturing history.

OPPORTUNITIES & ASSETS

- The access to interstates I-35 and I-40, both important intercontinental routes.
- Access to large manufacturing center in Dallas/Fort Worth.
- The value of the US dollar has declined, which is a major advantage for manufacturers who export.
- In recent years, the euro and the yen have traded at relatively high values to the US dollar. While a devalued US dollar benefits US manufacturers, inflated currencies in Japan or Europe can likewise force producers there to plan their future expansions abroad.

REGIONAL BUSINESSES

Employer Name	Industry	Local Employees
Terex Roadbuilding	Construction Machinery Manufacturing (333120)	1,500
ATC Drivetrain Inc.	All Other Motor Vehicle Parts Manufacturing (336399)	1,000
Remy Power Products	All Other Motor Vehicle Parts Manufacturing (336399)	900
Tronox Inc.	Inorganic Dye and Pigment Manufacturing (325131)	700
Hitachi Computer Prods America	Other Computer Peripheral Equipment Manufacturing (334119)	500

IV. Projects

Investment Priorities

The U.S. Economic Development Administration (EDA) requires a CEDS in order for a community or region to apply for investment assistance under EDA's Public Works or Economic Adjustment Assistance programs. One of the central objectives of this CEDS is the identification and review for appropriateness of primary development and redevelopment opportunities in the ACOG region. Mindful of the current strategic development priorities at the national level, TIP created a scoring methodology to allow for local projects to be ranked according to how well each project aligns with national investment priorities and local considerations. Those with higher scores will be more likely to receive federal investment assistance.

EDA has established a number of investment programs designed to assist regions and communities to become more competitive in the global economy. The agency allocates its investment assistance through a competitive grant process. To facilitate the evaluation of competing grants, EDA has established the following investment priorities:

- Collaborative Regional Innovation
- Public/Private Partnerships
- National Strategic Priorities
- Global Competitiveness
- Environmentally-Sustainable Development
- Economically Distressed and Underserved Communities

EDA also seeks projects able to demonstrate the ability to use funds quickly and effectively, which are linked to specific and measureable outcomes. Additionally, EDA favors initiatives that support the national strategic priorities pursued by the federal government, which are intended to promote job creation and business expansion in the following areas:

- Clean energy
- Green technologies
- Sustainable manufacturing
- Information technology infrastructure
- Communities impacted by auto industry restructuring
- Natural disaster mitigation and resiliency
- Access to capital for small/medium & ethnically diverse enterprises
- Innovations in science, healthcare, & alternative fuel technologies

Community Needs

Communities in central Oklahoma were asked to provide an assessment of their requirements, including descriptions of any projects that require funding. These are listed as submitted by participating stakeholders:

Calumet

With the gas and oil exploration, several new businesses have started in the City of Calumet. The restaurants and RV parks are full and the rural farm economy is strong and land prices are skyrocketing. Farmers are also making money from the gas and oil leases. However, the grocery store has closed and there is not much retail business in the city. Calumet is short on income from sales tax. *No specific project identified.*

Choctaw, Sewer Infrastructure Improvements

The City of Choctaw is in need of several sewer infrastructure improvements.

Project	Distance	Unit Cost
12" sewer line north of railroad and east of Hiwassee along NE 23 rd Street.	1,800 L.F.	\$185,400
Wastewater Treatment Plant upgrade		\$1,000,000
18" and 15" sewer line to Indian Meridian Elementary and James Griffith Intermediate Schools	15,840 L.F.	\$1,932,480
12" Sewer line extension from SE 15 th to commercial node at SE 29 th and Indian Meridian Road.	7,920 L.F.	\$554,400
12" Sewer line extension from SE 15 th to commercial node at SE 29 th and Choctaw Road.	7,920 L.F.	\$831,600

Choctaw, Transportation Infrastructure Improvements

A number of transportation infrastructure improvements are required by the City of Choctaw. These include:

The expansion of Choctaw Road from 2 lanes to 4 lane boulevard from SE 29th Street to NE 63rd Street. This project is to support the expansion of access to the Turner Turnpike (I-44) and I-40.

Development of coordinated rail plan between OKC and Shawnee. This project is in its infancy but could generally be described as a multi-jurisdictional entity to maintain and support continued rail service (freight and otherwise) along the existing A-OK railroad. This project has not been approved by Choctaw City Council, or the adjoining entities.

Widening of N. Henney and N. Harper road between NE 23rd Street and ½ mile north. This project is to support the development of a retail center in downtown Choctaw.

Widening of N. Harper from NE 23rd Street and NE 10th Street. This is the primary corridor between Choctaw High School, and also the main entrance to Choctaw Creek Park which is the home of Choctaw's Oktoberfest.

Eastern Oklahoma County, Business Development Center Incubator

The Eastern Oklahoma County Business Incubator recently opened in 2011. It has received growing interest and currently hosts many meetings. As the BDC continues to grow, needs may include the expansion of the current building and/or the development of an adjacent facility to meet small business tenant needs.

Eastern Oklahoma County, Emergency Services Support Center (Nicoma Park)

The EOC Technology Center has purchased the Bancfirst Building on Westminster Road in Nicoma Park for law enforcement and emergency training. The facility could also serve as a 9-1-1 emergency center for Eastern Oklahoma County.

Edmond, Interstate 35 and Covell Road Mixed Use Development Park

The proposed project in Edmond would involve three of the four corners of the intersection of Interstate 35 and Covell Road in the north-central section of our community. The project would be a major public—private partnership between the City of Edmond and three related private development groups, and would include approximately three hundred acres currently under private ownership for all anticipated phases of the development. The project would feature a Conference Center/Hotel, a major indoor sports complex, a second hotel (extended stay), a new building for the local technology center that would also house the Center for Municipal Excellence training facility, and extensive new retail and commercial development.

The conference center is anticipated to be approximately 20,000 square feet, with banquet capacity for 800 people. The attached hotel is expected to include 160 rooms. The indoor sports complex is anticipated to include 180,000 square feet, which will feature 12 convertible basketball/volleyball courts and two turf fields. The extended--stay hotel will involve an additional 108 rooms. The size of the new technology center building is 38,000 square feet.

It is estimated that the total private investment in the project will be approximately \$50M. The City's investment would include the purchase of land for both the hotel/conference center and the sports complex (approximately 29 acres), and then the development of lease-back arrangements for both the conference center and sports complex. The City would also finance the construction of the conference center, and provide the internal infrastructure (roads and utilities) for the initial phase of development on the northwest corner of the property in conjunction with the hotel/conference center. The estimated amount of the City's investment is approximately \$11M, and, along with the temporary tax exemptions to the developers from the land purchases, is critical to the project moving forward. The City's funding is anticipated to come from a bond issue that will be serviced by our 2000 Sales Tax Capital Improvements Fund.

The total estimated public/private cost of the project is approximately \$61M. With mandatory buy-back provisions for both land parcels and the lease arrangement for conference center, the City expects to eventually recover around \$9M of the total \$11M investment. The City is interested in the possibility of EDA funding for the internal infrastructure for the northwest corner, estimated at \$2M. We believe the required 50% local match for these improvements could come from the City's \$2.2M land

purchase for the hotel/conference center. It is difficult to estimate the number of new jobs to be created from all potential phases of this development. However, considering the complete development will encompass around 300 acres, we conservatively believe that at least 500 new jobs will be created within 10-15 years at full anticipated build out. Discussions concerning the many details of the proposed Development Agreements are continuing, and no agreements have been signed to date. This public/private venture would be the largest economic development project in the history of our Edmond community.

El Reno

El Reno has recruited 6 businesses that will add over 3500 jobs in the next 3 years. Most of these are related to the growing gas and oil business. In addition, they have developed several businesses that bring diversity to the community. One is a manufacturer that ships products overseas. The community also has a federal prison that employees a large group of people. The City's CIP program was just completed with about \$30 million of improvements to our "quality of life".

The City has identified a need for housing. El Reno has a unique challenge in that there are so many "tax free" properties that it is hurting the schools. Therefore, most of the employees that they are bringing in want to live in the Yukon area. They are applying to the CDBG program for infrastructure for water and sewer improvements to those new businesses. These new businesses are increasing the demand on our utilities. *No specific project identified.*

Geary

With the gas and oil exploration, several new businesses have started in the City of Calumet. The restaurants and RV parks are full and the rural farm economy is strong and land prices are skyrocketing. Farmers are also making money from the gas and oil leases. However, the grocery store has closed and there is not much retail business in the city. Calumet is short on income from sales tax. *No specific project identified.*

Harrah, Harrah Industrial Park

The Harrah Industrial Park is 175 acre industrial park owned and managed by the Harrah Development Authority. Future public and private assistance will be used to further enhance park infrastructure and amenities including gas line extension, telephone service, dual redundancy of current electric services (onsite electrical substation), park road extension, and signage as needed.

Harrah, Downtown Development

Continued revitalization and development of historic downtown area including but not limited to utility improvements, streetscapes, etc.

Harrah, Sewer Line Extensions

12" sewer line extension from 19979 NE 23rd to commercial node further west along NE 23rd in Harrah. Also, 12" sewer line extension from SE 29th Street and Harrah Road to future commercial node further west along SE 29th street.

Jones, Library Development

The Jones Board of Trustees approved a "letter of intent" with the Metropolitan Library System for the building of the new Jones Library. The building is located on Britton Road and has been donated by BancFirst. Additional support is being sought for construction and utility development.

Jones, Industrial Park Development

The City of Jones is considering two possible sites for possible development as industrial park. One site is approximately 175 acres and the other site is 75 acres. Both sites will need the extension of water and sewer lines, gas and power services.

Jones, Downtown Development

Continued revitalization and development of historic downtown area, including but not limited, to utility improvements, streetscapes, etc.

Jones, Business Incubator

The City of Jones is considering the development of a business incubator in the downtown area to support the development of local entrepreneurship and small business development. Two sites are currently under construction.

Logan County/Guthrie, Sewer Line Expansion Under I-35

Extend municipal sewer connection under I-35 to 80-acres owned by City of Guthrie for industrial park (This area has been broached by the National Guard for potential construction of an Armory/Reserve Center).

Logan County/Guthrie, Paving on Seward Road

Extend paving on Seward Road from Sooner Rd. to St. Hwy. 74 to create east-west corridor.

Logan County/Guthrie, Study on Regional Wastewater Treatment

Study on Regional Wastewater Treatment for Logan Co. communities.

Logan County/Guthrie, Sewer Line Replacement

Replace 55,000 linear ft. of sewer line in city limits of Guthrie, identified in State CMOM.

Logan County/Guthrie, Aviation Incubator

Aviation incubator at Guthrie/Edmond Regional Airport focused on Unmanned Aerial Systems.

Logan County/Guthrie, Airport Water & Sewer Extension

Extension of water & sewer to east side of runway at Guthrie/Edmond Regional Airport for industrial development.

Logan County/Guthrie, Cooksey Road Access

1½ mile industrial access road (Cooksey Road) in Crescent to accommodate two gas plants who are adding 25 employees each.

Logan County/Guthrie, Cooksey Road Fire Hydrants

Installation of fire hydrants along Cooksey Road west of St. Hwy 74.

Logan County/Guthrie, Cooksey Road Bridge Repair

Bridge repair on Cooksey Road.

Logan County/Guthrie, Sports Complex

Regional sports complex.

Logan County/Guthrie, Guthrie Wye Track

Installation of a "wye" track for a turnaround system for passenger rail west of Division St. and south of Lincoln Ave. – Guthrie.

Logan County/Guthrie, Liberty Lake Water and Sewer Line Extension

Extend municipal water and sewer lines to and around Liberty Lake for future Development.

Logan County/Guthrie, Downtown Guthrie Sidewalk Installation and Design

Design and installation of sidewalks from Guthrie's downtown Central Business District, down Division St. to Mineral Wells Park.

Logan County/Guthrie, Indian Meridian Road Paving

Pave Indian Meridian Road from Hwy 105 to Hwy 33.

Logan County/Guthrie, Hwy 33 to Langston Lake Asphalt

Asphalt road from Hwy 33 to Langston Lake (2 miles).

Logan County/Guthrie, Luther Road Paving

Pave Luther Road from Waterloo to Hwy 105 (10 miles).

Luther, Main Street Development

Redevelop Main Street in an effort to revitalize the local economy, the Town of Luther has purchased four buildings on Main Street. Plans for the buildings are as follows:

One of the buildings will be converted to an indoor, year-round farmer's market with a commercial kitchen. The farmer's market will allow residents to have access to a large variety of fresh foods grown locally; it will support local growers of all sizes; and it will bring tourists to Main Street. Having the commercial kitchen will also enable growers to add value to their products, and it will allow other small business owners the opportunity to rent the kitchen.

A two-story building will be renovated for use as a business incubator and residential lofts. The small business owner that is just starting out will have affordable business and living space in one location. We intend to target minority business owners as tenants.

Another building that once housed Engel's Dry Goods Store is listed on the national Registry of Historic Places. Plans for this building include restoring it to resemble Engel's and possibly adding a museum.

The Town of Luther Police Department currently occupies the fourth building.

Luther, Blight Removal

To the south of the newly purchased buildings in the downtown Luther area is blight. Several abandoned buildings have been decrepit for years. The buildings are a detriment to the community, make an unfavorable impression on visitors, and occupy space that could be used for new businesses, community gardens, or other suitable structures that would benefit the Town. The buildings will either be brought up to code or torn down.

Luther, Route 66 Water & Sewer Line Extension

The extension of water/waste water service is needed to support existing businesses and growth of undeveloped commercial land located to the north of HWY 66 and west of Luther Road. Offering these services will enable us to be more competitive as we seek to recruit new businesses to the area and retain current businesses.

Norman, National Weather Museum and Science Center

Temporary store front for mobile displays. Total project budget: \$500,000. Permanent museum: Total project budget: \$80,000,000. Contact is Doug Forsyth 325-6500.

Norman, Gymnastics Hall of Fame

Total project budget: \$50,000,000.

Norman, Pisces Aquatic Center

Total project budget: \$20,000,000.

Norman, Legacy Park development

Total project budget: \$5,000,000.

Norman, Sooner Theater

Marquee repairs and new theatre sign. Total project budget: \$50,000.

Norman, Fire House Art Center Expansion & Remodel

Add 1200 square feet for offices, classroom and gift shop; Add two ADA restrooms and remodel existing classrooms. Total project budget: \$600,000.

Norman, Norman Depot Interior Improvements

Improvements to basement, platform lighting, interior trim and hallway restroom. Total project budget: \$57,000.

Norman, Event Center

This could host sporting events, home & garden, auto and boat shows, etc., this center would be in conjunction with our meeting convention center at Embassy Suites to allow bigger conventions at this facility and to attract new events to Norman.

Norman, Westwood Tennis Center

Enclose two indoor tennis courts and add two new outdoor courts. Total project budget: \$700,000.

Norman, Downtown Improvement Plan

To market Downtown as a destination and to expand area onto Porter Avenue when the Porter Avenue Corridor Plan implementation is completed; Retail types; Improvements; Landscaping; Incentives to relocate business to the downtown. Total project budget: \$150,000.

Norman, Reconstruction of West Lindsey Street 24th SW – Berry Road

Includes drainage solutions, widening of street, sidewalks, landscaping, and bike lanes. Will alleviate congestion (worst corridor in the metro area for congestion) and provide better access to businesses. Total project budget: \$21,535,000.

Norman, Reconstruction of 36th Ave. NW: Tecumseh – Indian Hills

Includes widening of street and sidewalks. Potential area for new businesses to develop. Total project budget: \$16,105,000.

Norman, Reconstruction of 12th Ave. SE: Cedar Lane – Highway 9

Significant new development expected because of recently platted residential subdivisions. Potential for new businesses to develop to serve new subdivisions. Total project budget: \$3,100,000.

Norman, Reconstruction of Cedar Lane: 12th Ave. SE – east of 24th Ave. SE

Significant new development expected because of recently platted residential subdivisions. Total project budget: \$9,500,000.

Norman, University North Park

The development of a business park, including office, and mixed-use development, focusing on attracting new enterprises creating quality employment opportunities, emphasizing high-tech, financial, intellectual property, and administrative businesses adjacent to the University of Oklahoma Westheimer Airport.

Norman, Wastewater Plant expansion

Total project budget: \$20,800,000.

Norman, Water line upgrade on Flood: Acres – Robinson

Total project budget: \$1,500,000. This services a business corridor and would provide for the possibility of redevelopment.

Norman, Highway 9: 24th Ave. SW – Jenkins Water Main

Construction of large water main currently proposed on Highway 9: 24th Ave. SW – Jenkins. Total project budget: \$1,200,000.

Okarche

With the gas and oil exploration, several new businesses have started. The restaurants and RV parks are full. The rural farm economy is strong and the land prices are skyrocketing. The farmers are making money from the gas and oil leases. In addition, Okarche has several businesses that employ many people. Temp Trol is a large and well known air conditioning business that is going strong. Carter Chevy is operating a company that is converting pickups to natural gas. Their main customer is Chesapeake and they are doing around 5,000 trucks at this time.

Okarche is one of those communities that has everything going their way right now. Their revenue is strong and the community works together very well. They are poised for growth as their location on the NW expressway and their small town charm attracts many people. *No specific project identified.*

Oklahoma City, American Indian Cultural Center and Museum

Completion of the American Indian Cultural Center and Museum.

Oklahoma City, S Eastern Ave. & I-240

Employment Land Needs Assessment & Action Plan (“ELNAAP”) Study Area 2 infrastructure capacity improvements to support employment land development: Water: \$680,000; Sewer: \$400,000; Roads: \$9,920,000; Electricity: \$10,500,000; Gas: \$800,000. Environmental Remediation: \$1,000,000. Total project budget: \$23,300,000. Estimated permanent job creation potential: 3,681.

Oklahoma City, SW 29th St. & S. MacArthur Blvd

ELNAAP Study Area 5B infrastructure capacity improvements to support employment land development: Project budget: Water: \$660,000; Roads: \$2,620,000; Electricity: \$500,000. Total project budget: \$3,780,000. Estimated permanent job creation potential: 2,158.

Oklahoma City, General Pershing Blvd. & N. Villa Ave

ELNAAP Study Area 16 infrastructure capacity improvements to support employment land development: Project budget: Water: \$100,000; Roads: \$2,320,000. Total project budget: \$2,420,000. Estimated permanent job creation potential: 950.

Oklahoma City, Will Rogers World Airport, South Portland Ave. Realignment

Construct and Realign South Portland Ave Roadway from SW 59th street to just South of SW 74th street with signaling, drainage, as well as reconstructing SW 74th and SW 89th streets off of Interstate I-44. The roadway is vital to support and open up a 1,000 acres mixed use property development including direct aviation, industrial and retail on the east side of Will Rogers World Airport. Total project budget: \$9,300,000.

Oklahoma City, Will Rogers World Airport, World Airport East Side Access Roadway

Construct Access Road to facilitate business development between SW 74th street and SW 89th street with signaling, drainage and entrances directly connected to the east side of the airfield. The roadway would directly support Direct Aviation business development requiring taxiway access on the east side of Will Rogers World Airport's 1,000 acres mixed use property development, while also supporting business development not requiring direct airfield access. Total project budget: \$6,600,000.

Estimated permanent job creation potential for both Will Rogers World Airport projects: 6,270.

Oklahoma City, Remington Park

Infrastructure to support Corporate Campus. Total project budget: \$5,000,000 Estimated permanent job creation potential: 500.

Oklahoma City, Former Page Woodson School Facility

Building Rehabilitation and infrastructural improvements to support an African American Cultural Center and Museum. Total project budget: Building Rehabilitation: \$15,000,000; Infrastructure: \$15,000,000. Estimated permanent job creation potential: 350.

Oklahoma City, Tinker Air Force Base

BNSF Rail Yard Expansion with support services and environmental remediation. (160-acres). Total project budget: Expansion and Support Services: \$25,000,000; Environmental: \$5,000,000. Estimated permanent job creation potential: 2,700.

Oklahoma City, Tinker Air Force Base, Maintenance Repair and Overhaul Technology Center (MROTC)

MROTC. Total project budget: \$10,000,000. Estimated permanent job creation potential: 200.

Oklahoma City, Each of four (4) quadrants in Oklahoma City

Infrastructure and site improvements to support the development of four (4) Senior wellness center campuses. Total project budget: \$8,000,000. Estimated permanent job creation potential: 1,000.

Oklahoma City, Core to Shore-North of I-40 Realignment

Utility/parking infrastructure and streetscape improvements associated with repositioning area affected by I-40 realignment and necessary to support mixed-use development adjacent to MAPS 3 Central Park and Convention Center projects (222 acres). Total project budget: \$22,200,000. Estimated permanent job creation potential: 200.

Oklahoma City, Oklahoma Health Center

Infrastructure, parking, access and circulation improvements to support OHC Master plan (1.9mil sf.). Total project budget: \$200,000,000. Estimated permanent job creation potential: 10,000.

Oklahoma City, Oklahoma Avenue

Land acquisition, relocation, structured parking, and new roadway to increase access and redevelopment opportunities to support Intermodal Transportation Hub. Total project budget: \$34,550,000. Estimated permanent job creation potential: 75.

Oklahoma City, American Indian Cultural Center Boulevard; South of Oklahoma River

New roadway, drainage, signaling, utilities and entrance roads to support hotel, retail and conference center near American Indian Cultural Center and Boathouse Row. Total project budget: \$2,500,000. Estimated permanent job creation potential: 350.

Oklahoma City, East Reno & Martin Luther King Boulevard

New roadway, drainage, signaling, utilities and entrance roads to support distribution logistics center. (68 acres). Total project budget: \$4,500,000. Estimated permanent job creation potential: 250.

Oklahoma City, Core to Shore-West Park Area

Infrastructure, parking, access and circulation improvements to support Med-High Density Residential & Street Level Retail (approx. 60 acres). Total project budget: \$222,000,000. Estimated permanent job creation potential: 500.

Oklahoma City, Core to Shore-Boulevard Mixed Use Area

Infrastructure, parking, access and circulation improvements to support Med-High Density Mixed Use Development. (approx. 11 acres). Office, Retail, Residential, and Structured Parking. Total project budget: \$108,500,000. Estimated permanent job creation potential: 2,500.

Oklahoma City, Core to Shore-East Park Area (Former Planned Convention Center Site)

Infrastructure, parking, access and circulation improvements to support Med-High Density Mixed Use Development. (approx. 30 acres). Hotel, Retail, Residential, and Structured Parking. Total project budget: \$273,000,000. Estimated permanent job creation potential: 1,900.

Oklahoma City, Core to Shore - Civic Projects

Infrastructure, parking, access and circulation improvements to support West Park Neighborhood Recreational Center, Union Station Adaptive Reuse, Central Park Events Center, Cultural Center. (500k sf.) Total project budget: \$75,000,000. Estimated permanent job creation potential: 250.

Oklahoma City, Core to Shore – Bridgewater

Repurpose salvage site with additional access, environmental cleanup and necessary infrastructure to support a corporate campus development (70.6 acres). Office & Structured Parking. Total project budget: \$78,600,000. Estimated permanent job creation potential: 2,700.

Oklahoma County, Eastern Oklahoma County Gate

Eastern Oklahoma County gate that was just recently completed at Hogback Rd. and I-44. At this time you can only get to and from Oklahoma City using this gate. In future would like to complete the gate so that citizens can travel to and from Tulsa from this point. The rest of the projects that Oklahoma County does are mostly overlays, bridge repairs and/or construction, and various smaller projects.

Oklahoma County, District 3 Flood Remediation Project

District 3 (Commissioner Vaughn's district) does have a flood remediation project that we are looking for funding on. The project entails MacArthur Blvd. from NW 178th St. to NW 206th St. Oklahoma County is proposing roadway and bridge improvements on MacArthur Boulevard from Edmond Road to approximately 450' south of Covell Road in Oklahoma County, Oklahoma. The proposed project will include the replacement of a multi-cell RCB and two PC-beam span bridges over Deer Creek with PC-beam span bridge, approximately 1400' in length that will span the flood plain in this area. The roadway profile for MacArthur Boulevard will be modified to meet the required bridge elevation, and will also be modified in other areas in order to minimize the required Right-of-Way acquisition. The roadway will be reconstructed to the full depth and

will be widened to include 8' shoulders. The intersection at MacArthur Boulevard and Edmond Road will be reconstructed to the full depth. No additional lanes or capacity improvements will be included in this project.

Piedmont, Road Repairs

Piedmont is growing in population very quickly. They have new homes and new schools being built. People in OKC and the surrounding area see Piedmont as a great place to live and raise their families. Piedmont was very aggressive on recruiting a grocery store. This store has been very successful.

With the growth in the community, Piedmont is stretched financially to build the infrastructure needed to support this growth. Piedmont does not have a large retail base to support this growth. Many of the people that live in Piedmont, work outside Piedmont. This creates a community that does not have close "community spirit".

The east end of Piedmont was struck with a tornado just last year. The residents that live in this area are rebuilding slowly. The roads leading from Piedmont need repair desperately. As so many people travel these roads to work they need work but the city does not have the retail tax to support the repair of so many roads.

Union City, Housing Development

The good news. With the gas and oil exploration, several new businesses have started. The rural farm economy is strong and the land prices are skyrocketing. The farmers are making money from the gas and oil leases. Several new businesses are building on the north edge of Union City. This is bringing in about 200 new jobs.

Union City has a prison. This provides steady work for many people. They have a very aggressive and progressive city council. Recently, they offered a sales tax rebate to a truck stop that wants to build in Union City.

Union City needs housing. Their city clerk has received several grants to build or remodel homes in their city. However, with 200 new families they need many more houses. People who own land are hesitant to sell their land to developers as they see the prices going up quickly.

University of Oklahoma, Research Campus Infrastructure

OU has made a strategic investment in its University Research Campus (URC) to expand regional research capabilities, bring private and federal companies on site, and create wealth through job creation and technology commercialization. Since 2005, infrastructure investment of nearly \$300 million has created or strengthened over 500 private and 250 federal jobs, increased OU research by 60% on the Norman campus alone, and more than doubled the return on OU technology development.

The University continues to develop the Research Campus in earnest. Some legacy infrastructure remains from when the property was a U.S. naval base. This infrastructure is in poor condition, and, in many instances, has been out of use for decades. A master plan for the area has been updated and will be implemented as new

building projects become feasible. Among the infrastructure improvements needed are utilities; site clearing; construction of roads, drives and parking; and information technology systems expansion. This project requires additional funding of \$5,000,000 to prepare the Research Campus for the next phase of development.

University of Oklahoma, Land and Street-scaping

Furthermore, the University is preparing for future growth by completing essential land-and street-scaping well in advance of infrastructure development. New and existing companies will benefit from co-location on the Research Campus, but are less-likely to do so with much of the site in a relatively undeveloped condition. By performing this infrastructure work in the near term, prospective tenant companies (1) are better able to envision their surrounding environment, (2) know that the site preparation is complete and the investment has been made, and (3) will be more likely to join the innovation ecosystem of the URC, which, in turn, accelerates job growth.

University of Oklahoma, Radar Innovations Laboratory

The Radar Innovations Laboratory will be located on the URC. The new facility creates an innovative environment where groundbreaking radar researchers and their discoveries will generate high paying jobs across the array of related industries including defense, weather, and aerospace. The 36,000 square-foot building will create open working spaces for research efforts pertaining to the design, assembly and testing of radar system components. The lab affords graduate students with supporting fabrication shops test areas, and two anechoic chambers for low and high frequency research. The estimated total project budget is \$15,000,000.

University of Oklahoma, Partners Place

In less than a decade, OU has constructed over 270,000 square feet of multi-tenant office facilities (aka “Partners Place” buildings) which co-locate academic research, government agencies, and private industry. This investment houses over 500 private sector jobs. To date, the four existing “Partners Place” buildings have pre-leased in full prior to opening. To meet market demand, OU is seeking to build a fifth Partners Place building which will provide approximately 100,000 square feet of space, portions of which will be designated for University research programs. Necessary infrastructure associated with the new building will also need to be constructed as part of the project. The four-story building will be located in close proximity to the existing building in order to enable multi-discipline collaboration. The estimated total project budget is \$27,000,000.

University of Oklahoma, Polarimetric Phased Array

Since 1964, the University of Oklahoma and National Sever Storms Laboratory (NSSL) have jointly pioneered advanced radar for atmospheric sensing, resulting in the tri-agency (DOD, DOT, DOC) NEXRAD and FAA TDWR systems. Together OU and NSSL are developing the follow-on to NEXRAD, known as the multi-function phased array radar (MPAR), in conjunction with private industry, and a National Science Foundation research center. It has been funded to study the use of radar data for fi ne-

scale numerical weather prediction as well as develop new technologies for dynamically adaptive sampling and prediction. Oklahoma also continues to pioneer the use of mobile Doppler radars to study tornadoes and hurricanes at close range.

Upon analysis, the University determined that a high-quality polarimetric radar, focused on the educational and research missions of the University, was essential, thus, in partnership with Enterprise Electronics Corporation (EEC), OU purchased the OU-PRIME (Polarimetric Radar for Innovations in Meteorology and Engineering). Only one other system like it exists in the world. Also in partnership with EEC, OU developed a polarimetric X-band Doppler radar for commercial use with partial funding from the Oklahoma Economic Development Generating Excellence (EDGE), a statewide technology development funding program. Sales are expected to commence by the end of 2012. The estimated total project budget is \$15,000,000.

In 2011, consistent with its Strategic Initiative in Defense, Security and Intelligence (DSI) Research, OU hired a concentration of four faculty in defense-related radar engineering, representing an important step toward broadening the radar and remote sensing enterprise beyond weather. Today, annual radar research expenditures in Norman average approximately \$10 million.

University of Oklahoma, Unmanned Aerial Vehicles

Over the past decade, the rapid expansion of unmanned systems technology has spawned many opportunities for both basic and applied research and development. The unmanned systems domain includes ground, aerial, and maritime systems.

Although many research institutions have successful research programs in unmanned systems, these efforts can also be considered an enabling technology for many other areas of basic research such as atmospheric monitoring and sampling, oceanographic mapping, and ecological monitoring and surveillance. Military applications for UAS continue to dominate the UAS industry. However, as non-military UAS are allowed to operate in the national airspace (NAS) over the next few years, it is anticipated that the potential commercial and non-military UAS applications will grow substantially.

OU has a rich legacy in aerospace-related research, and its aerospace research facilities such as wind tunnels and design and fabrication laboratories are ideally-suited to support UAS related research and development. OU's research capabilities are not limited to the UAS sector. For example, OU's history in automotive research combined with OU's current robotics research efforts accelerates possibilities for unmanned ground system research and development. OU's automotive research in the past involved intelligent suspension systems for GM automobiles and early prototypes of automated parallel parking for small automobiles. Likewise, current unmanned ground system research includes several robotics research projects including current research in areas such as automatic paving systems. The estimated total project budget is \$7,000,000.

University of Oklahoma, Software Business Accelerator

The University's Software Business Accelerator (SoBA), a division of OU's Center for the Creation of Economic Wealth (CCEW) creates new software applications and businesses by combining the talent of interdisciplinary students, the expertise of faculty researchers, and the experience of private sector entrepreneurs to launch software products on an accelerated time line.

Since its launch in 2011, SoBA has provided 44 student interns an unparalleled opportunity to experience the technology-based entrepreneurial process, from idea generation to product development and launch on multi-specialty teams. SoBA draws diverse talent from the entire university, utilizing interns with 17 different majors, from computer science, finance, and visual communications to film studies and Chinese. In the process, students gain valuable problem solving, project management and leadership skills, which combine to further any career path. Students are also part of an intensive mentoring and training program, which facilitate one-on-one interface with software development and entrepreneurial leaders and tailored programming instruction. To date, SoBA has delivered over 200 hours of specialized training to develop SoBA interns.

SoBA enriches the academic experience and strengthens the competitive profile of its graduates with a one-of-a-kind opportunity to experience the entrepreneurial process. SoBA has currently developed 6 software based businesses, generating novel and marketable intellectual property for OU. SoBA also acts as a vehicle to solidify University relationships with private sector companies such as Google and Apple, as well as smaller software organizations in the Oklahoma area, such as the OKC CoCo. The program has received recent press in Fast Company after strong showings in technology conferences such as South by Southwest and TechCrunch.

SoBA is currently seeking funding in the amount of \$600,000 to continue the exponential growth it has seen over the past year as it forms a foundation for a self-sustainable program in the years to come.

University of Oklahoma, Oklahoma Microfinance Fund

The Oklahoma Microfinance Fund (OMF) is a program founded through a partnership with the OU's Price College of Business, the Center for the Creation of Economic Wealth (OU's business incubator), and MetaFund, a non-profit venture capital firm in Oklahoma City. OMF partners undergraduates with small businesses and entrepreneurs seeking funding. OU students accepted into the OMF program are trained in commercial lending and finance. Interns are able to provide loan preparation advice to small business, OMF clients, who go through a structured approach to loan preparation which small business creates a polished loan submitted to MetaFund and other organizations. OMF leverages the successful MetaFund model of providing finance to undercapitalized businesses. OMF's goal is to accelerate capital acquisition in Oklahoma. OMF focuses on providing services to businesses that will create quality, lasting jobs in the state and ensure that Oklahoma an enabling environment for small business to thrive. \$1,000,000 is being sought to fund this project.

University of Oklahoma, Data Center

In the spring of 2003, the OU Health Sciences Center executive leadership team committed the university and associate organizations to a strategy for protecting the information assets of the university and providing compliance with federal regulation for the security of personal health information. In support of this strategy, Information Technology will implement multiple technical solutions including the consolidation of confidential information within a secure environment.

Centralizing electronic confidential information in a secured data center addresses many issues including increased physical security, application of uniform administrative procedures, uniform data custodial activities including backups, off –site storage, and disk drive disposal, and uniform network protection policies.

The Information Technology Department seeks to acquire new core network equipment for \$1.5 million to be utilized in the new Health Sciences Center campus data center including some initial components for the upcoming Norman data center with which it will collaborate in a per-campus shared services model. This equipment will provide necessary connectivity for servers and data storage housed in those facilities, enhancing the resiliency of technology services and disaster recovery capabilities of all three University campuses as part of the Information Technology Shared Services Initiatives.

University of Oklahoma, Targeted Cancer Therapy Equipment

Cancer is a disorder within human cells, which are predominantly hidden within a diseased cell, and therefore, one cannot distinguish cancerous cells from healthy cells. It has been demonstrated that, if a target unique to the surface of cancerous cells can be discovered, cancer can be stopped. Unfortunately, few markers distinct to the surface of cancerous cells have so far been identified. The few surface cancer markers that have been discovered have resulted in successful cancer therapies worth billions of dollars. The goal is to discover changes to cancerous cells that are “visible” so that cancer new therapies can be developed.

William Hildebrand, Ph.D., came to OUHSC from Stanford University in 1993 and is now an Endowed Professor in the School of Medicine at the University of Oklahoma Health Sciences Center. His laboratory works on the HLA “alarm system”. The HLA “alarm system” reveals at the cell surface unhealthy changes that would otherwise remain hidden within cancerous and virus infected cells. His laboratory has received almost \$40M in research grants and contracts from agencies that include the National Institutes of Health, the National Marrow Donor Program, and the Department of Defense. Clinically, Dr. Hildebrand’s laboratory matches transplant patients at OUMED for organ and bone marrow transplantation. Pertaining to business development, Dr. Hildebrand founded the biotech company Pure Protein LLC in 1999 and he serves as Chief Scientist for this Oklahoma City based biotech company. Through his university laboratory and his biotech company, Dr. Hildebrand continues to make substantial medical and economic contributions to the State of Oklahoma.

Dr. Hildenbrand and his team seek to purchase a new mass spectrometer for his laboratory. The goal is to leverage this updated equipment in order to remain competitive for grant support, contract support, and in the search for targets that can be utilized for the development of cancer therapies. The project’s estimated cost is \$850,000.

University of Oklahoma, Peptide Research

As an OU Health Sciences spin-out company, Biolytx has developed a new class of anti-infective treatments with a unique mechanism of action—the peptide-based antibiotic—to reduce the high mortality rate of hospital-acquired pneumonia results from the growing tide of antibiotic-resistant bacteria.

OU is currently seeking \$1 million to leverage the combined expertise of Biolytx and many leaders in the Oklahoma biotechnology community, OU's Small Animal Imaging Facility (SAIF), Analytical Research Laboratories (ARL), and the Midwest Institute of Science and Technology. The creation of these linkages will propel Oklahoma peptide research in coordinated, high impact outcomes.

University of Oklahoma, Disaster Preparedness Center

There are three areas relevant to the central Oklahoma area. First and foremost is in the area of coordinating police and law enforcement activities that cross county and municipal lines. Further, an opportunity exists to harmonize the process to dispatching until which support municipal services (electricity and water) and commands authority by annual regional training. Finally, while many of the first responders have created some strategic approaches to how disasters are handled; but, there is suggestion that elected officials, who ultimately have the final authority, both for personnel and budgets, should also be involved in the strategic planning and disaster training activities.

OU Outreach has pioneered community, law enforcement and corrections training. The College of Liberal Studies, one of the divisions of Outreach, has undergraduate and graduate degrees in Criminal Justice, which operates alongside Department of Human Service, Department of Mental Health and state training. As part of its Center for Public Management OU has provided services to over 8,000 governmental employees and over 32,000 open enrollment programs by over 300 workshops, five academies and over 100 conferences. OU Outreach has also worked closely with the Office of Juvenile Affairs to establish initiatives such as juvenile boot camps, programs for high risk youth and families and dealing with an array of substance abuse programs. This training creates a corporate capacity for Outreach allowing OU to establish a center for disaster preparedness, with an emphasis on law enforcement.

University Outreach suggests the creation of a central Oklahoma disaster preparedness program that provides an array of conferences, workshops and certificates related to ensuring that first responders, especially law enforcement, are well prepared to meet disaster events. Further, the center will provide annual workshops for elected officials in counties and municipalities to ensure that they understand the ramifications of an array of different disaster situations. A key aspect of that training would include a variety of scenario-based learning activities that allows elected officials and key administrators the opportunity to anticipate and prepare for activities in disasters, coordinating among administrative units and providing efficient service delivery. Outreach staff, OU personnel and external presenters for approximately \$250,000.

University of Oklahoma, Employee Assistance Center

OU Outreach stewards a Southwest Prevention Center that serves as a catalyst for positive social change and is committed to the prevention of alcohol, tobacco and other drug abuse and related high risk behavior. It has a history of providing prevention information, training technical assistance and prevention resources to agencies and clients in a multi-state region. It currently operates the Southwest Center for the Application of Prevention Technologies, one of six regional centers, provides services to the states contiguous to Oklahoma. It is suggested that the Southwest Center could work closely with businesses and governmental agencies in the region to create an employee assistance center that could be provided, at cost, to regional small and moderate sized businesses that may not be able to establish separate employee assistance programs internal to a company or organization. While a number of commercial vendors provides such services, they often are difficult for entry level or small to moderate businesses to provide. By partnering with the OU, businesses seeking to relocate or expand in the central Oklahoma region benefit from this additional service. Leveraging University resources, such an employee assistance center could be created for approximately \$100,000 a year.

University of Oklahoma, Economic Development Institute

What is Economic Development and what is the role and responsibility of the community, business, government and the private sector? OU's Economic Development Institute (EDI) creates a foundation of understanding and opportunity including: preparation of economic asset/liability and preparedness factors; providing practical skills to understand the unique management and behavior of economic development organizations; how and economic development strategy can improve the success and effectiveness of communities; and, best practices of legislative processes, regional, national and international economic development. The estimate costs for this project are \$25,000 annually.

University of Oklahoma, Chamber of Commerce Excellence Executive Development

This program is designed to provide community professionals and volunteers' necessary skills and behaviors needed to position and market community resources and capacities. As a result, communities with limited financial resources and opportunities will have an increased awareness and understanding on how to improve their competitiveness and strengths. Topics will include finance and business operations, event management, government relations, economic development, and membership development. The estimated costs for this program are \$17,500 annually.

University of Oklahoma, The Lean Institute

Lean and Green is a training program that uses Lean process improvement tools specifically to address environmental waste. In its classic form, Lean manufacturing is purely oriented around increasing efficiency to increase competitiveness. However, many Lean improvements have a secondary benefit of being environmentally friendly. Lean works by reducing waste, tangible and intangible, and is ideally suited to adapt for the purposes of environmental conservation. In the Lean and Green Certificate

Program, the perspective of Lean has been adjusted so that environmental conservation is the primary metric, with important secondary metrics such as reductions in the costs of energy/material/garbage, increased customer and worker loyalty, and public relations benefits. The estimated cost is \$25,000 annually.

University of Oklahoma, Workforce Training Institute

University Outreach currently has the Workforce Oklahoma Training Institute (WOTI) that assists Oklahoma State government and Oklahoma workforce systems to improve quality by increasing the knowledge, skills and capacity of professionals engaged in the development of the state's labor force and workforce center system. The WOTI was established in 1980 and is one of the longest continuously operating training institutes in the national workforce network. It currently offers the Employment and Training Professional Certificate and the Group Career Guidance Specialist Certificate to people in the Oklahoma Workforce system helping to develop their skills and techniques for assisting individuals interested in seeking employment.

It is suggested that the WOTI could create a series of workshop events that would be provided for human resource professionals in the central Oklahoma region to enhance their skills in developing selection, assessment, retention and retirement planning for workers in the region. The potential training certificates, technical academy and partners conference could be created by leveraging existing activities for approximately \$50,000-100,000.

Amendments to the project list (August 7, 2012)

Edmond

Transit Center – This project involves the development of a new Transit Hub located in the area of 3rd and Broadway. The transit center would expand parking opportunities and create a designated transfer point for Citylink public transportation users. It would also create a safer and more comfortable environment to change buses. The additional parking for the area will encourage new business development. The development area has also been established as an intermodal location for access to potential passenger and commuter rail service in the future. The potential for new commercial activity (Transit Oriented Development) becomes a very real possibility with the initiation of this project.

Estimated project cost: \$2.5 million

Estimated job creation: 75

Kickingbird Golf Course Indoor Training Facility – Golf is a very strong recreational activity in Edmond, and the city golf course is located on the northeast corner of Danforth and Bryant. The city is interested in creating a public/private partnership with a national golf instruction program for the development of an indoor training facility on the lighted driving range. We are hoping to create a new business opportunity with people coming to our community and our course for special instructional training. This project will also create new visitor traffic to Edmond as well, as often people spend a week working with golf instructors to improve their game. The project will also result in new recreational opportunities for our local citizens through the specialized instruction.

Estimated project cost: \$350,000

Estimated job creation: 8

Remaining Internal Infrastructure for Northwest Corner of I-35 and Covell – The project would provide the internal infrastructure (roads and utilities) for the additional phases of development that are anticipated for this corner section.

Estimated project cost: \$800,000

Estimated job creation: 700 (This number reflects both primary and secondary job growth. The number has been increased since the original submission because of additional prospects that have expressed interest in the project.

Road Widening, Covell Road, from I-35 to Air Depot – Another component of the major development referenced above, this project would help facilitate development on the northeast corner. The project would widen this initial mile section east of the interstate to four-lane status, with a median. Also included would be the intersection of Covell and Air Depot, and then a certain distance east of the intersection. We have already had a groundbreaking on this property, with the Francis Tuttle Technology Center moving forward to construct a two-story, 38,000 square foot facility that will also house the Center for Municipal Excellence Training Facility. This property is also projected for extensive new retail and commercial development.

Estimated project cost: \$8.5 million (does not include engineering, right-of-way acquisition, or utility relocations)

Estimated job creation potential: 300

Downtown Parking Garage – This project will support ongoing and expanded commerce in the downtown Edmond area, and help address a growing need for additional parking. The project would include three stories and approximately 250 parking spaces. The cost reflects an estimate of \$20,000 per space, and a total of 85,000 square feet.

Estimated project cost: \$5 million

Estimate job creation potential: Unknown. We believe any attempt to estimate is premature.

Harrah

Complete the infrastructure in the Harrah Industrial park, road, water, sewer lighting and sign.

Midwest City

Continuing development of the Soldier Creek Industrial Park.

Mustang

- Completion of the Sara Road Corridor.
- Designate Shopping Centers as TIF District.
- Expand infrastructure for publishing company wanting to relocate and expand.

Norman

The University North Park Advanced Manufacturing Center is a 30 acre high-end business park targeting aerospace, medical devices, and other high tech, advanced manufacturing. University North Park Corporate Centre is a 30 acre Class A office park that offers 6 pad sites, a large water feature, state-of-the-art telecommunications and airport access. Both of these projects are being developed by the Norman Economic Development Coalition (NEDC), a four-way partnership of the City of Norman, the University of Oklahoma, Moore Norman Technology Center, and the Sooner Centurions, a committee of the Chamber of the Commerce.

NEDC targets high-end, high-wage jobs primarily for college graduates. The average wage for the University North Park project is expected to be in the \$50,000 to \$70,000 range. The project area is in a premier location adjacent to Interstate 35 and the University Town Center retail center with over 2 million sq. ft. of retail, a 300 room Embassy Suites Hotel, a new 75,000 sq. ft. convention center, and a lifestyle retail center.

V. Site and Building Requirements

Requirements	Heavy Industrial	General Manufacturing	Light Industrial / Assembly	Office - Technical Services Center	Office - Call Center	Warehouse & Distribution / Logistics	Research & Development
Acreage	Minimum of 50 developable contiguous acres	Minimum of 15 developable contiguous acre	Minimum of 15 developable contiguous acres	Minimum of 15 developable contiguous acres	Minimum of 10 developable contiguous acres	Minimum of 50 developable contiguous acres	Minimum of 5 developable contiguous acres
Zoning	Zoned for heavy industrial	Zoned for industrial use	Zoned for light industrial/assembly	Zoned for office use	Zoned for office use	Zoned for warehouse/distribution	Research and development
Environmental	Not in any EPA air quality Severe Non-Attainment & Class I areas. Free of wetlands, protected species or other environmental issues. Outside of a FEMA 100-year flood plain.	Free of wetlands, protected species or other environmental issues. Outside of a FEMA 100-year flood plain.	Free of wetlands, protected species or other environmental issues. Outside of a FEMA 100-year flood plain.	Free of wetlands, protected species or other environmental issues. Outside of a FEMA 100-year flood plain.	Free of wetlands, protected species or other environmental issues. Outside of a FEMA 100-year flood plain.	Free of wetlands, protected species or other environmental issues. Outside of a FEMA 100-year flood plain.	Free of wetlands, protected species or other environmental issues. Outside of a FEMA 100-year flood plain.
Electric	20,000 kilowatt (kW) demand, 13,500,000 kilowatt hour (kWh)/monthly usage.	2,000 kilowatt (kW) demand, 1,400,000 kilowatt hour (kWh)/month usage	1,200 kilowatt (kW) demand; 400,000 kilowatt hour (kWh)/monthly usage	1,500 kilowatt (kW) demand, 1,000,000 kilowatt hour (kWh)/month usage	750 kilowatt (kW) demand, 360,000 kilowatt hour (kWh)/monthly usage	2,500 kilowatt (kW) demand; 1,500,000 kilowatt hour (kWh)/month usage	600 kilowatt (kW) demand; 324,000 kilowatt hour (kWh)/month usage
Water (gallons/day)	585,000 gpd	170,000 gpd	150,000 gpd, dual sourcing.	12,000 gpd	6,000 gpd	6,000 gpd	2,500 gpd
Wastewater (gallons/day)	450,000 gpd	155,000 gpd	150,000 gpd	12,000 gpd	6,000 gpd	6,000 gpd	2,500 gpd
Solid Waste	1,000 tons/month						
Natural Gas	115,200 mcf/month peak demand, 90,000 mcf/month usage; capacity for on-site electric generation (co-generation)	4,000 mcf/month usage	833 mcf/month usage	600 mcf/month usage	250 mcf/month usage	1,600 mcf/month usage	150 mcf/month usage

Requirements	Heavy Industrial	General Manufacturing	Light Industrial / Assembly	Office - Technical Services Center	Office - Call Center	Warehouse & Distribution / Logistics	Research & Development
Telecommunications (minimum)	T-1 line with at least 1.5 Mbps bandwidth or equivalent service.	T-1 line with at least 1.5 Mbps bandwidth or equivalent service.	T-1 line with at least 1.5 Mbps bandwidth or equivalent service.	Access to OC-1 with at least 52 Mbps bandwidth, SONET ring infrastructure or equivalent service.	T-1 line with at least 1.5 Mbps bandwidth or equivalent service.	T-1 line with at least 1.5 Mbps bandwidth or equivalent service.	T-1 line with at least 1.5 Mbps or equivalent service.
Telecommunications (preferred)	T-1 line with at least 45 Mbps bandwidth or equivalent service	T-3 line with at least 45 Mbps bandwidth or equivalent service	T-3 line with at least 45 Mbps bandwidth or equivalent service	Access to OC-3 lines at least 155.5 Mbps bandwidth, with SONET ring infrastructure and dual bi-directional rings from two Central Offices (CO's).	Access to OC-3 lines with at least 155.5 Mbps bandwidth, SONET ring infrastructure, dual bi-directional rings from two Central Offices (CO's) or equivalent service.	Telecommunications : Access to OC-3 lines with at least 155.5 Mbps bandwidth, SONET ring infrastructure or equivalent service.	Access to OC-1 lines with at least 52 Mbps bandwidth, SONET ring infrastructure, dual bi-directional rings from two Central Offices (CO's) or equivalent service.
Location and Transportation (minimum)	Rail served. Within 10 miles, via truck route, of an Interstate or limited access, 4-lane improved US national highway system.	Within 10 miles, via truck route, of an Interstate or limited access, 4-lane improved US national highway system.	Within 10 miles, via truck route, of an Interstate or limited access, 4-lane improved US national highway system.			Within 5 miles, via truck route, of an Interstate or limited access, 4-lane improved US national highway system.	Within 45 miles of a university with Ph.D. programs and R&D support/activity.
Location and Transportation (preferred)	Within 5 miles via truck route, of an Interstate or limited access, 4-lane improved US national highway system. Within 60 miles of a commercial service airport.	Within 5 miles, via truck route, of an Interstate or limited access, 4-lane improved US national highway system. Within 60 miles of a commercial service airport.	Within 5 miles, via truck route, of an Interstate or limited access, 4-lane improved US national highway system. Within 60 miles of a commercial service airport.				Within 10 miles of a university with Ph.D. programs and R&D support. Within 60 miles of a commercial service airport.

Source: Canup & Associates

Goal Five: Promote environmental stewardship, and monitor environmental impacts

ACOG has been at the forefront of many proactive and voluntary environmental programs throughout the years. ACOG staff is heavily invested in air quality programming. The Central Oklahoma region has participated in emissions-reductions strategies for nearly two decades. ACOG Water Resources staff has been contracted in the past to do pathogen and total maximum daily load studies, which are commissioned by the Oklahoma Department of Quality Services, and benefit a large majority of our member communities. Environmental Justice is a major component of ACOG's transportation planning program, and studying the potential environmental impacts on the region is a major consideration on our quality of life.

Progress in growing economic development should not adversely impact the Central Oklahoma environment. ACOG staff follows all EPA and NEPA laws and closely monitors environmental impact activity. ACOG staff studied and analyzed current impacts to the CEDS plan and how it also relates to other ACOG programs and finds that the organization is following through on its commitment to grow economic development in the region without adversely impacting the environment.

Data Collection

The data collection process included contacting numerous federal, state, and local agencies via correspondence, personal interviews, and telephone and email conversations. In most cases, these agencies were asked to provide the most recent impact data along with any associated physical locations. If the database included a complete address field, the information could be linked with a physical location by using the address-matching feature in the (ESRI) ArcGIS mapping software. Unfortunately, this was not always possible due to inadequate address information in the impact's data. The ArcGIS software was then used to map each impact by the physical locations identified from the databases. This was done by manually locating the address range and inserting a point, or by digitizing the feature on separate layers into the active GIS file. Staff also used a technique known as overlay analysis to evaluate the social, environmental, and economic impacts. This allowed identification of any potential conflicts.



Environmental Impacts to the Central Oklahoma Comprehensive Economic Development Strategy

This report summarizes an analysis of potential environmental impacts resulting from implementation of the goals and objectives of the Central Oklahoma Economic Development Strategy (CEDS), which was conducted in 2011-2012 by staff of the Association of Central Oklahoma Governments (ACOG). The impacts report was performed simultaneously with an environmental impacts report for the Oklahoma City Area Regional Transportation Study (OCARTS) Plan. This plan, also known as the Encompass 2035 plan, serves as the long range transportation plan for the Central Oklahoma region. The Encompass 2035 Plan was approved by the ACOG Board of Directors in May 2012. The ACOG Board approved submission of the CEDS (to EDA) in August 2012.

It is important to note that this impact analysis is regional in nature. It in no way replaces the detailed Environmental Impact Statement (EIS) required by the National Environmental Policy Act (NEPA)¹ for any transportation improvement project, or any environmental information required by U.S. EDA for and EDA grant application, or any other individual economic development infrastructure project utilizing federal funds.

Assessment Categories

ACOG staff created a list of social, economic, and environmental impacts relevant to the Central Oklahoma region. Data relating to these topics was gathered and analyzed by ACOG staff, the Intermodal Transportation Policy Committee (ITPC), Intermodal Transportation Technical Committee (ITTC), Citizens Advisory Committee (CAC), the Areawide Planning and Technical Advisory Committee (APTAC) and the ACOG Board of Directors. Staff gathered information on the following topics:

Social Impacts

Archaeological sites

Federal Tribal Trust Land Holdings

Historic Sites and Districts

Safety (annual accidents predicted)

¹ The National Environmental Policy Act (NEPA) [42 U.S.C. 4321 et seq.] was signed into law on January 1, 1970. The Act establishes national environmental policy and goals for the protection, maintenance, and enhancement of the environment and provides a process for implementing these goals within the federal agencies. The Act also establishes the Council on Environmental Quality (CEQ). The complete text of the law is available for review at <http://ceq.hss.doe.gov/nepa/nepanet.htm>.

Economic Impacts

Total Cost (of Encompass 2035 Plan)

Residential/Employment displacements

Low Income Neighborhoods

Environmental Impacts

Parks/Open Spaces

Endangered Species

Flood zones

Surface and Subsurface/Aquifer Water Quality

Hazardous Waste and Superfund Sites

Leaking Underground/Aboveground Storage tanks

Noise Sensitive Locations

Air Quality



Strategy 5.A: Social Impacts

Archaeological Sites

The State of Oklahoma Archaeology Department was requested to provide a listing of all archaeological sites in the Central Oklahoma region. Due to confidentiality issues, information on the sites could not be listed by physical location. Approximately 800 recorded sites are located in the area. It was emphasized that only a small amount of the land in this area has been studied and there was a great probability for the discovery of more sites. Therefore, the State Archaeologist recommended that new projects be reviewed on a case by case basis. ACOG's relationship with its members, partners and state agencies allow maximum effectiveness when identifying and resolving conflicts between development and historic resources. Maintaining the capabilities to adequately identify historic and archeological resources and create economically viable restoration and re-use alternatives for such resources are rapidly becoming the keys, not only to resolving critical development conflicts but also for moving potential liabilities into the assets column.

Since the exact location of any archaeological sites could not be determined, staff could not develop maps and graphically display the sites. This impact analysis will need to be completed for each project during the required EDA review process for economic development projects utilizing federal funds.

Tribal Trust Land Holdings

These are lands under the jurisdiction or control of a Native American tribe (also known as trust land). Information was requested from various tribal organizations in the Central Oklahoma area including the Bureau of Indian Affairs (BIA) at Anadarko, OK, the Absentee Shawnee Tribe, the Kickapoo Tribe and Chickasaw Nation, were also contacted. The Absentee Shawnee Tribe's land holdings are primarily in an area on the east side of Lake Thunderbird in Cleveland County. The Kickapoo Tribal land holdings are in eastern Oklahoma County, north of Harrah. At least two parcels of the Chickasaw Nation are located in the Newcastle area, but in general, the McClain County area is unknown. Because of the sensitivity of the data, a detailed site-specific proximity analysis, and graphical display of the individual land holdings were not produced. ACOG continues to foster relationships with its tribal partners, recognizing the valuable contributions they make to economic development in the region.

National Historic Sites/Districts

Information on the National Register of Historic Places, Sites and Districts was collected from the National Park Service, the Oklahoma State Historical Society, and the City of Oklahoma City Planning Department. All of the existing, new, pending, and proposed historic districts and sites have been digitized using ArcGIS. Historic districts were drawn as a region on a separate layer. There are 146 sites and 24 districts in the region that are listed on the National Park Service's National Register of Historic Places. Staff contacted the State Historical Society representatives to verify all of the data. Any proposed project identified in the CEDS as a Community Need will be evaluated for potential impact on historical resources and alignment with EDA investment priorities.

Safety

ACOG staff calculated the annual fatalities and injuries for the region using the accident rates per million vehicle miles of travel (VMT) published in the U.S. Department of Transportation. The projected annual fatalities predicted are 113. The projected annual injuries are 11,352. Project level design should strive to resolve potential safety hazards. This was done exclusively for the Encompass 2035 Plan, as safety is a new point of emphasis for the U.S. Department of Transportation.

Residential Displacements

ACOG staff contacted the Oklahoma Department of Transportation (ODOT) and other local area transportation staff in regards to the possible number of residential and business displacements that could be caused by the Encompass 2035 Plan projects. It was not possible to get an accurate count of the number of future residential displacements, as these are calculated on a project by project basis. Staff did obtain a list of residential and commercial displacements from the years 2005-2009 from ODOT, Norman, and Oklahoma City.

Since the CEDS is essentially a “wish list” of projects submitted by regional partners, it is premature to do a residential displacement measure on the comprehensive list of projects. If any of the projects on the CEDS does go forward with implementation, a thorough review of residential displacement will be performed.

Neighborhoods, Low Income and Traditionally Underserved Groups

Acquisition of rights-of-way and/or close proximity of improvements may negatively impact low-income and minority groups. (See related Environmental Justice Attachment, page 19).

Strategy 5.B: Environmental Impacts

Parks and Open Spaces

An inventory of the current park (land) and anticipated future park land was assessed. These parcels included public parks and area golf courses. Also, river boundary areas, common areas, flood plain, sub-divisions and apartment complex green space are not classified as city parks but show up as parkland or open space use in some cases. The Oklahoma Department of Wildlife Conservation (ODWC) provided the shapefile of the Wildlife Management Area in Southeast Cleveland County. Any future economic development project will be evaluated according to EDA's environmental priorities with due consideration being given to the preservation of local, state and national parklands and open spaces.

Livability

The Central Oklahoma region has placed an emphasis on livability and quality of place. An example of this commitment is Oklahoma City's development of a downtown park as part of the Metropolitan Area Projects (MAPS 3) initiative. The Downtown Public Park consists of a 40-acre upper section and a 30-acre lower section connected by the pedestrian bridge that spans the relocated Interstate 40 Freeway. The park is within the boundaries of Hudson Avenue on the west, Robinson Avenue on the east, the future Boulevard on the north (SW 3rd St.) and the Oklahoma River on the south.

The City of Moore recently passed a bond issue for development of a 60-acre park, and several communities, including Yukon, Edmond, Norman and Midwest City are developing on and off-road trails for recreational use.



The region's commitment to quality of place has and will continue to contribute to the economic growth of the Central Oklahoma region.

Wildlife and Endangered Species

United States Fish and Wildlife Services (USFWS), Southwest Region, provides a listing on their website of all endangered and threatened species for Oklahoma counties. The animals identified, and their status, located within the ACOG area counties are the:

- Arkansas River shiner (Threatened), (Critical habitat designated)
- Black-capped vireo (Endangered)
- Interior least tern (Endangered)
- Lesser prairie-chicken (Candidate, Warranted but precluded)
- Piping plover (Threatened)
- Whooping crane (Endangered)

The Arkansas River Shiner and Interior Least Tern are the only area species to have an official USFWS critical habitat delineation and can be reliably mapped, i.e. the Central Oklahoma watersheds. Although these species are primarily restricted to the main river channels and lakes, it does not ensure that they actually inhabit the specific areas.

Staff conversed with staff from the Oklahoma Department of Wildlife Conservation Department to obtain data on Endangered Wildlife.

There are no state-listed threatened or endangered species in the Central Oklahoma area. Only the federally-listed species are identified. While these species are threatened and protected to different degrees, all represent the potential for conflict with the region's economic development goals. ACOG continues to maintain relationships with the governing agencies and local governments to support continued and expansive protective measures for these unique species. Any conflicts between protection and development will be resolved to foster environmental stewardship for generations to come.

Floodplains and Wetlands

Staff acquired data from the Federal Emergency Management Agency (FEMA) that contained floodplain files for Canadian, Cleveland, Logan, and Oklahoma counties. The Digital Flood Insurance Rate Map (DFIRM) database depicts flood risk information and supporting data used to develop the risk data. The DFIRM database is derived from Flood Insurance Studies (FISs) and previously published Flood Insurance Rate Maps (FIRMs). The 2008 FEMA shapefiles of four counties (Canadian, Cleveland, McClain, Oklahoma) were combined with Logan county flood hazard data from 2010 as well as Grady county flood hazard data from 2005. The shapefiles of the six counties were combined, then queried forming a 100 and 500 year floodplain shapefile. Staff conferred with several area entities to verify that the data was accurate.

ACOG's Water Resources staff regularly addresses floodplain issues in ways not addressed by other agencies. While floodplain and wetland issues have not created substantial conflict or constraints on economic development projects, ACOG will continue to monitor contributing factors and remain vigilant in protection of these resources.

Water Quality

Staff acquired GIS shapefiles of the Aquifers located within the region from ACOG's Water Resource Division. The three Aquifers are the El Reno Minor Aquifer, the Canadian River Alluvial Aquifer, and the Garber-Wellington Aquifer. The Garber Wellington Aquifer is the largest Aquifer system in the ACOG area. It covers parts of Canadian, Cleveland, Oklahoma and Logan Counties. The Aquifers are a significant natural feature and a source of ground water for many entities in Central Oklahoma. Most of the recharge for the Aquifer is located east of I-35. Many of the large area lakes provide drinking water for entities in the metro area, and neither the CEDS Plan nor the Encompass 2035 is expected to impact these surface water supplies. ACOG's Water Resources staff continues to monitor aspects of the region's water supply and quality. Various studies in the past few years have included a TMDL and pathogen study on the Oklahoma River and assistance with Phase II communities on EDA stormwater run-off.



Hazardous Waste Sites/Superfund Sites

The Superfund program was created as a result of the Comprehensive Environmental Response, Compensation, and Liability Act (CERCLA). CERCLA was enacted in 1980, and amended by the Superfund Amendments and Reauthorization Act of 1986. These acts established broad authority for the government to respond to problems posed by the release, or threat of release, of hazardous substances, pollutants, or contaminants. CERCLA also imposed liability on those responsible for releases and provided the authority for the government to undertake enforcement and abatement action against responsible parties. Staff obtained Oklahoma's Comprehensive Environmental Response, Compensation, and Liability Information System (CERCLIS) database of Hazardous Waste sites by county (see list page 8-9). The county files were loaded into Excel and the files were imported into ArcGIS, converted to shapefiles and verified by aerial photo. Staff members at the Oklahoma Department of Environmental Quality (ODEQ) were contacted to obtain further guidance and knowledge of sites throughout the region.

Superfund Sites in the ACOG/CEDS four-county region (1 of 2)

EPA ID	Site Name	City	County	Non-NPL Status Code	Non-NPL Status Date	NPL Status Code
OK0001004332	10TH STREET SLUDGE SITE	OKLAHOMA CITY	OKLAHOMA	NF	1/25/2002	N
OKN000607490	BACHMAN SERVICES FIRE	OKLAHOMA CITY	OKLAHOMA	RO	10/4/2012	N
OKN000605581	BP PIPELINE SPILL	EDMOND	OKLAHOMA	RO	9/24/2003	N
OKN000606884	CHISHOLM CREEK RESPONSE	EDMOND	OKLAHOMA	RO	7/22/2008	N
OKD987083805	DEL CITY TAR PIT	DEL CITY	OKLAHOMA	NF	9/26/2001	N
OKD007188717	DOUBLE EAGLE REFINERY CO.	OKLAHOMA CITY	OKLAHOMA	[Blank Code]	[Blank Date]	D
OKN000607068	EAGLE INDUSTRIES	MIDWEST CITY	OKLAHOMA	ES	10/27/2011	N
OKD987085438	EDMOND COMPRESSOR STATION	EDMOND	OKLAHOMA	RO	4/27/2011	N
OKN000607380	EDMOND DRUM	EDMOND	OKLAHOMA	RO	3/12/2012	N
OKD980696470	FOURTH STREET ABANDONED REFINERY	OKLAHOMA CITY	OKLAHOMA	[Blank Code]	[Blank Date]	D
OKD987096054	HAFER PARK	EDMOND	OKLAHOMA	NF	9/21/2004	N
OKN000607040	HENLEY'S SEALANT/ZONOLITE WR GRACE	OKLAHOMA CITY	OKLAHOMA	RO	10/4/2011	N
OK0001097724	MERCURY OIL REFINERY COMPANY	OKLAHOMA CITY	OKLAHOMA	NF	10/23/2000	N
OK0690540000	MIKE MONRONEY AERONAUTICAL CENTER	OKLAHOMA CITY	OKLAHOMA	DR	4/1/1988	N
OKD980620868	MOSLEY ROAD SANITARY LANDFILL	OKLAHOMA CITY	OKLAHOMA	[Blank Code]	[Blank Date]	F
OKN000605571	NATURAL DISASTER (TORNADO)	[Blank City]	OKLAHOMA	RO	5/11/2005	N
OKD980511174	OKLAHOMA CITY DISPOSAL LANDFILL	OKLAHOMA CITY	OKLAHOMA	NF	7/1/1980	N
OKN000607483	ROBBERSON STEEL COMPANY	OKLAHOMA CITY	OKLAHOMA	PS	10/11/2012	N
OK0001409507	S.E. 15TH ST. DRUMS	OKLAHOMA CITY	OKLAHOMA	NF	10/24/2001	N
OKN000605572	SOUTHWEST ENERGY/COOPER TRUCKING PETROLEUM	OKLAHOMA CITY	OKLAHOMA	RO	5/14/2005	N

Superfund Sites in the ACOG/CEDS four-county region (2 of 2)

EPA ID	Site Name	City	County	Non-NPL Status Code	Non-NPL Status Date	NPL Status Code
OKD980620967	TENTH STREET DUMP/JUNKYARD	OKLAHOMA CITY	OKLAHOMA	[Blank Code]	[Blank Date]	D
OK1571724391	TINKER AIR FORCE BASE (SOLDIER CREEK/BUILDING 3001)	OKLAHOMA CITY	OKLAHOMA	[Blank Code]	[Blank Date]	F
OK0001056324	WILCOX OIL COMPANY REFINERY	OKLAHOMA CITY	OKLAHOMA	NF	1/11/1995	N
OKN000607376	YUKON DRILLING FLUID DISPOSAL	OKLAHOMA	OKLAHOMA	RO	3/13/2012	N
OKN000605520	CENTRAL OKLAHOMA LIGHT & POWER COMPANY	NORMAN	CLEVELAND	NF	9/30/2004	N
OK0002365138	EMCO TERMITE AND PEST CONTROL	OKLAHOMA CITY	CLEVELAND	RO	5/11/2000	N
OKD987087814	OLD NORMAN LANDFILL	NORMAN	CLEVELAND	NF	1/27/2003	N
OKD987096302	U.S. NAVY DUMP GROUNDS	NORMAN	CLEVELAND	NF	3/18/1993	N
OKD987067758	COYLE DRUMS	COYLE	LOGAN	NF	1/25/2002	N
OKN000606971	KELNE SMELTER	SEWARD	LOGAN	NF	1/25/2011	N
OKD007194467	OKLAHOMA FURNITURE	GUTHRIE	LOGAN	NF	10/23/2000	N
KD987098233	CONCHO DUMP	NORTH OF EL RENO	CANADIAN	NF	3/13/2006	N
OK0000187559	EL RENO GAS & ELECTRIC	EL RENO	CANADIAN	NF	5/11/2005	N

Leaking Underground Storage Tanks (LUST)

ACOG staff received a current listing of the Leaking Underground Storage Tanks (LUST) and Leaking Above Ground Storage Tanks (LAST) database from staff at the Oklahoma Corporation Commission (OCC). Staff obtained the database in Excel. The files were imported into ArcGIS, converted to shapefiles and verified by aerial photo. All open and closed cases were geocoded from 1998 to 2009. Closed cases could be viewed as an environmental liability only because those sites may retain impacted groundwater and/or soils caused by a release from a regulated fuel tank.

The OCC staff provided guidance on why closed LUST/LAST investigations are important to document:

All assessment/cleanup investigations are based on a determination of regulated fuel contamination levels in soils and/or groundwater, and the presence of risk for exposure to that contamination by either current or potential receptors at or near that site. Oklahoma uses the ORBCA methodology to determine acceptable levels of regulated fuel contaminants at each release site. These acceptable contaminant levels are based on site conditions present at the time the investigation

is completed. Therefore, even though a release case is closed, there may remain remnant levels of contamination in site soils and/or groundwater that have been determined to not pose a threat to human health, safety or the environment.

However, if site conditions change from those reported during the ORBCA investigation, or previously unknown contamination is found, the level of risk for exposure may also change. If this situation should occur, a current environmental liability may be present at a closed release case site. This issue will be reviewed and evaluated on a case-by-case basis as potential economic development projects are considered for EDA funding opportunities.

Potential Noise Sensitive Locations

A listing of potential public noise sensitive areas were compiled which included: schools, institutions of higher education, hospitals, nursing homes, child care facilities and religious organizations. ACOG staff created a subset of 2005 employment file containing records with Standard Industrial Classification (SIC) codes that fall within the noise sensitive guidelines. The SIC codes, currently known as North American Industry Classification System (NAICS) codes, were grouped and combined into a database. This database was imported into ArcGIS and converted to a shapefile.

Locations falling under the SIC CODES for Hospitals, Day Care Centers, Nursing Homes, Churches, and Schools were extracted from the geocoded 2005 employment dataset. The SIC codes used in the selection included:

SIC Group 80 – Health Services (hospitals, etc.)

SIC Group 82 – Educational Services (Schools, Colleges, Universities, etc.)

SIC 8351 – Child Day Care Services

SIC 8361 – Residential Care

SIC 8661 – Religious Organizations

The noise impact of any potential economic development infrastructure project is unknown at this point. Any funded individual project will undergo further scrutiny on noise impact before it is constructed and/or implemented.



Air Quality

The Clean Air Act Amendments of 1990 (CAAA) strengthened the need for improved coordination between air quality and regional planning, and established mandatory requirements for metropolitan areas that violate federal air quality standards.

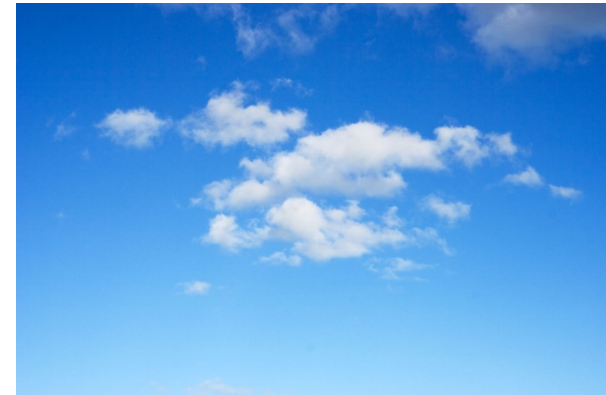
While Central Oklahoma remains in attainment for all federally regulated pollutants, ground level ozone continues to be a problem. Consequently, ACOG has been proactive in its planning endeavors to reduce mobile source emissions—cars and trucks—which account for approximately 60 percent of the region's pollution.

As required by EPA, ozone levels are routinely monitored by the Oklahoma Department of Environmental Quality (ODEQ) at six locations in Central Oklahoma between the months of May and October. Carbon monoxide is monitored at one site in north Oklahoma City. If the ozone standard is exceeded at just one monitoring station, the entire region is considered to be in violation.

Pollutants of Primary Concern to Central Oklahoma

Ground-level ozone—also known as smog—can damage lung tissue and is especially harmful for those with asthma and other chronic lung diseases. Therefore, EPA has set national ozone standards and designed control programs to protect against its adverse health effects. Ozone that occurs higher up in the atmosphere is generally natural in origin and forms a protective layer that shields life on earth from the sun's harmful rays.

Ozone is formed throughout the lower part of the earth's atmosphere through a series of chemical reactions involving sunlight and ozone precursors such as volatile organic compounds (VOCs) and oxides of nitrogen (NOx). Carbon monoxide (CO) and methane (CH₄) also contribute to ozone formation. These precursors are emitted from a variety of man-made sources including industrial facilities, power plants, landfills, and motor vehicles. Precursor emissions from natural sources such as lightning, soil, and trees also contribute to ozone formation.



Transportation sources are significant contributors to several pollutants that EPA regulates, including volatile organic compounds (VOCs) and oxides of nitrogen (NOx), the two major air pollutants related to smog. Transportation emissions are the result of the interaction of four factors: vehicle fuel efficiency, the carbon content of the fuel burned, the number of miles that vehicles travel, and the operational efficiency experienced during travel.

Another pollutant of concern is particulate matter (PM). Particulate matter is a complex mixture of extremely small particles and liquid droplets. When breathed in, these particles can reach the deepest regions of the lungs. Exposure to particle pollution is linked to a variety of significant health problems. Particle pollution is also the main cause of visibility impairment (haze) in the nation's cities and national parks. PM pollution is also produced from some natural, or biogenic, sources such as wildfires and dust from dry soils.

Carbon monoxide (CO) is a colorless, odorless, toxic gas produced by any process that involves the incomplete combustion of carbon-containing substances. It is considered a wintertime problem, and approximately 90 percent of CO emissions are generated by mobile sources. In March 1990, the EPA redesignated Central

Oklahoma an attainment area after having been classified as nonattainment for carbon monoxide since 1984. The region has not experienced any CO exceedances since the 1990 redesignation and continues to monitor CO values at a station in north Oklahoma City.

Central Oklahoma Ozone Status 2012

Ozone season in Central Oklahoma officially runs from May through October. ACOG works closely throughout the year with the Oklahoma Department of Environmental Quality (ODEQ) to rigorously monitor ozone levels during these peak months.

On March 12, 2008, the Environmental Protection Agency (EPA) significantly strengthened its national ambient air quality standards (NAAQS) for ground-level ozone, the primary component of smog. EPA revised the level of the 8-hour standard to 0.075 parts per million (ppm), specifically expressed to three decimal places to alleviate the controversy over rounding. The Central Oklahoma area was designated as an attainment area for ground-level ozone in May 2012.

To determine violation of the standard, U.S. Environmental Protection Agency (EPA) looks at the fourth highest reading at each site, and averages it over three years. For example, this past summer's readings will be averaged with readings from 2010 and 2011. The table below reveals the four highest readings at each monitoring location in Central Oklahoma and what we must do to remain in compliance with the current federal 8-hour standard in 2013.

Fourth highest readings for the past three years, as of 11/1/12

Site	2010	2011	2012	3-year Average	2013 Ceiling (0.075)
North OKC	0.072	0.084	0.081	0.079	0.062
OSDH	0.071	0.082	0.079	0.077	0.066
Moore	0.070	0.081	0.080	0.077	0.066
Goldsby	0.069	0.080	0.076	0.075	0.071
Choctaw	0.070	0.081	0.080	0.077	0.066
Yukon	0.072	0.083	0.075	0.076	0.069

Future Developments

Although the OCARTS area is officially in compliance with the federal air quality standards, regional leaders continue to explore strategies that will maintain and improve the region's air quality. ACOG works in concert with a multitude of stakeholders on air quality related activities with a particular focus on ground-level ozone.

The next regular review of the health and welfare science is well underway. EPA will propose any appropriate revisions in the fall of 2013 and finalize the standard in 2014. Central Oklahoma must remain vigilant in promoting good air quality habits if we are to remain in compliance in the future.

Air Quality Programs in Central Oklahoma

While the ACOG and CEDS region remains in attainment for all federally regulated pollutants, ozone continues to be a problem. ACOG employs proactive planning efforts to help maintain its air quality attainment status, including the following:

- Daily review of ozone and carbon monoxide monitoring sites throughout the Central Oklahoma area
- Opting into an 8-hour Ozone Flex Program with the Environmental Protection Agency. (ACOG also participated in a previous EPA program, the 8-hour Ozone Early Action Compact.)
- Administration of the Regional Rideshare Program – GetAroundOK
- Administration of a Public Fleet Conversion Grant program
- Administration of the Central Oklahoma Clean Cities program
- Use of an “air quality friendly” criterion in the selection of projects that will utilize the MPO’s Surface Transportation Program Urbanized Area (STP-UZA) funds
- Award of additional points for proposed long-range transportation plan projects that reduce emissions by decreasing fuel consumption and vehicle miles traveled, as well as by improving transportation system performance.
- Regular meetings of the ACOG Clean Air Committee. Initiatives born out of this group include:
 - The Clean Air Alert Day Program
 - *Get Your Own Square of Clean Air* Public Awareness Campaign

8-hour Ozone Flex Program Agreement with EPA

The 8-O₃Flex program is the third generation of voluntary ozone programs designed to allow participating communities greater flexibility when selecting emission reduction programs and strategies. By providing local control of the process, these programs recognize that each region has distinct emission characteristics and socioeconomic variables that make a standardized approach unrealistic and unrepresentative.

The Association of Central Oklahoma Governments worked in concert with a number of stakeholders to develop the emission control measures for the voluntary 8-O₃Flex program. Some of the essential facets of the 8-O₃Flex plan include early planning, implementation of emission reduction measures, broad-based public input and local control, as well as state support to ensure the technical integrity of the plan.

During 2007, regional stakeholders worked diligently to formulate a powerful agreement that includes emission reduction measures that are even stronger than those submitted with the previous 8-Hour Ozone Early Action Compact (EAC). In June 2008, the 5-year plan for Central Oklahoma² was officially signed and put into place by ACOG, EPA and ODEQ. ACOG is currently in compliance with the plan and has completed all required semi-annual and annual progress reports.

Public Awareness Campaign

Established in 1992, the Clean Air Alert Day Program is designed to help citizens and employers take proactive steps to help keep the Central Oklahoma region in compliance with federal air quality standards. ACOG has a website dedicated to clean air public education in the region at www.getsquare.org.

The ACOG Clean Air Committee, which includes staff from the Association of Central Oklahoma Governments (ACOG), City of Oklahoma City, Central Oklahoma Transportation and Parking Authority (METRO Transit), Oklahoma Department of Transportation (ODOT), Oklahoma Department of Environmental Quality (ODEQ), OGE Energy Corp. (OG&E), Chesapeake Energy, and the Greater Oklahoma City Chamber, meets before and during ozone season to manage public education activities for the program.

The Clean Air Committee notifies local media and calls attention to ACOG Ozone Alert Days when weather conditions may be conducive to elevated readings of ozone or carbon monoxide. Informing the public a day in advance gives people the opportunity to plan their activities, with the intent of reducing pollution levels.

Regional Rideshare Program – GetAroundOK

The Central Oklahoma rideshare program is dedicated to aiding commuters in finding easy, viable, and sustainable transportation. Its primary goal is to reduce the number of single occupancy vehicles in the ACOG CEDS region, by promoting and encouraging all forms of “alternative transportation”—any mode of commuting besides driving alone—to help reduce traffic congestion, improve air quality, lessen commuting stress, and save commuters money.

To do this, the rideshare program provides a free, web-based ride matching service that allows users to connect with other commuters with similar commuting schedules and preferences. The website offers services and information on carpooling, vanpooling, transit, bike trails, and park-and-ride lots. GetAroundOK (www.getaroundok.com) is simple, quick, and easy to use, while employing all measures possible to secure the identities and privacy of the users to ensure a safe and positive experience. To be eligible for this service, users must either have an origin and/or destination within the ACOG area.



² Central Oklahoma 8-Hour Ozone Flex Program Plan for 2008-2012, June 2008.

Fleet Conversion Grant Program

The Association of Central Oklahoma Governments' Public Fleet Conversion Grants allow its member local governments and their public school districts to access federal Congestion Mitigation/Air Quality (CMAQ) funds for fleet conversions to clean fuel technologies to include alternative fuel vehicles, hybrid vehicles and alternative fuel vehicle refueling infrastructure.

Central Oklahoma Clean Cities Program

Central Oklahoma Clean Cities program stakeholders represent more than 40 businesses and government agencies. Stakeholders are dedicated to the Clean Cities goals of reducing petroleum dependence in the transportation sector, improving air quality, expanding domestic alternative fuel use, accelerating deployment of advanced technology vehicles, low-level alternative fuel blends, hybrid vehicles, fuel efficient vehicles, fuel economy policies, and idle reduction technologies and policies. More information is available at the program's dedicated website at www.OKCleanCities.org.

ACOG's extensive involvement in studies and programs designed to monitor and combat air quality problems in Central Oklahoma is an ongoing aggressive effort. ACOG recognizes the importance of maintaining air quality standards in attracting and retaining business, growing economic development and supporting strategic priorities of clean energy, green technology, sustainable manufacturing and innovation in alternative fuel technologies. These priorities are critical to job creation and help position the region to be more competitive in the marketplace.



Conclusion on Environmental Impacts and the CEDS

ACOG staff concluded that the social, environmental, and economic impacts, identified at the regional level, would not prohibit adoption of the Encompass 2035 Plan or the Central Oklahoma CEDS Plan. Some projects may require increased time and costs in the planning and review process due to compliance with environmental and historical regulations, additional rights-of-way acquisition, and potential accommodations to neighborhoods, businesses, and historical places. Furthermore, a detailed site-specific impact assessment is required, as outlined by the National Environmental Policy Act (NEPA), for street and highway projects, or EDA requirements for economic development infrastructure projects utilizing federal funds.

ATTACHMENT 1: Evaluation of Economic, Environmental and Social Impacts

The following tables represent potential impacts of the Encompass 2035 Plan and the Central Oklahoma CEDS Plan.

Social impacts include archaeological sites, tribal lands, national historical sites/districts, and safety. The environmental impacts include parks/open spaces, endangered species, floodplains, water quality, hazardous waste and Superfund sites, leaking underground storage tanks, and noise sensitive sites. The economic impacts include residential and business displacements, environmental justice issues, (minority/underserved groups), and the total cost of each (Encompass 2035) alternate scenario.

This information is very general in nature since the data and potential impacts were evaluated at the regional level. The specific impacts of individual projects (highway, transit, trails, economic development infrastructure) will be evaluated in greater detail as part of the planning process prior to construction, as appropriate.

Potential Social Impacts

Social Impacts	Consideration	Anticipated Impacts
Archaeological Sites	There are approximately 800 archaeological sites within the Central Oklahoma area.	Minor accommodations may be necessary for specific projects; no significant impact.
Tribal Lands	The federal tribal trust lands in the region are mostly located in the eastern parts of Cleveland, McClain and Oklahoma counties.	The BIA and individual tribes must be contacted to determine exact locations. Otherwise no anticipated impact.
National Historic Sites and Districts	There are 146 sites and 24 districts in the region that are listed on the National Park Service's National Register of Historic Places.	Minor accommodations may be necessary for specific projects. Otherwise no anticipated impact.
Safety (Annual Accidents Predicted)	Fatalities – 113 Injuries – 11,352	Project level design should strive to resolve potential safety hazards (Encompass 2035 only).

Potential Economic Impacts

Economic Impacts	Consideration	Anticipated Impacts
Residential and Employment Displacements	Acquisition of rights-of-way for roadway improvement may result in displacement of residential and business properties.	Accommodations may be necessary for specific projects.
Neighborhoods Low Income and Traditionally Underserved Groups	Acquisition of rights-of-way and/or proximity of improvements may negatively impact low income groups.	Accommodations may be necessary for specific projects.
Encompass 2035 Costs	Street and Highway: \$6,272,533,691 Transit: \$1,004,563,795 Bicycle/Pedestrian: <u>\$ 247,631,366</u> Total: \$7,524,728,852	None. The Encompass 2035 Plan is financially constrained. The CEDS Plan includes a list of proposed projects, but none have a projected initial revenue source.

Potential Environmental Impacts

Environmental Impacts	Consideration	Anticipated Impacts
Parks and Recreational Areas	There will be minimal effects from bike or pedestrian paths on the natural environment; additional stormwater runoff may develop.	Minor accommodations may be necessary for specific projects.
Wildlife, and Endangered Species	There are five endangered or threatened species in the region; a portion of the South Canadian River, between McClain and Cleveland counties, has been designated a critical habitat by the Fish and Wildlife Service; the exact habitat of threatened avian species is unpredictable from year to year due to their migratory nature.	Minor accommodations may be necessary for specific projects.
Flood Plains	Street widening and construction projects across or near Cottonwood Creek, North Fork Walnut Creek, Deep Fork, Cimarron, Little, North or South Canadian Rivers or other major flood prone areas will incur increased construction costs.	Accommodations may be necessary for specific projects.
Water Quality: Surface and Aquifers	Street widening and construction projects will incur increased costs to protect surface and underground water resources from stormwater runoff and construction activities (EPA NPDES, Oklahoma's CSGWPP, and other Source Water Protection Programs).	Minor accommodations may be necessary for specific projects.
Hazardous Waste and Superfund Sites	There are 136 hazardous waste sites (some of which may require remediation) and five superfund sites (two active) within the region.	Planning and design of street widening/ construction projects near these sites will require special attention.
Leaking Underground Storage Tanks	There are approximately 103 open investigations of suspected or confirmed leaking underground storage tanks in the area; removal of tanks and remediation could delay progress on intersection improvements or street widening projects.	Minor accommodations may be necessary for specific projects.
Noise Sensitive Areas/Sites	There are 4,197 noise sensitive locations, (e.g., day care centers, schools, colleges, nursing homes, hospitals) within the region.	Street widening and construction projects could increase noise levels for residential areas and accommodations may be necessary.

ATTACHMENT 2: Environmental Justice

In August 2005, Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) was signed into law. SAFETEA-LU placed additional emphasis on environmental stewardship and the consideration of environmental issues as a part of metropolitan and statewide transportation planning. Each of these aspects strengthens the linkages between planning and environment which creates opportunities to examine the potential for environmental justice (EJ) issues early on and throughout the project delivery process.

There are three fundamental environmental justice principles:

- To avoid, minimize, or mitigate disproportionately high and adverse human health and environmental effects, including social and economic effects, on minority populations and low-income populations.
- To ensure the full and fair participation by all potentially affected communities in the transportation decision-making process.
- To prevent the denial of, reduction in, or significant delay in the receipt of benefits by low-income and minority populations.

The following report documents the methodology used to review the environmental justice considerations of the Encompass 2035 Plan and analyzes the data gathered for the review.

In the previous regional transportation plan (2030 OCARTS Plan), traffic analysis zones (TAZs) were used as the level of geography to analyze environmental justice issues. However, between 2000 and 2005, the number of TAZs in the region was increased from 848 to 2,450 in an effort to refine the ACOG's travel demand model. The increase in TAZs created a large discrepancy in zonal size between the downtown area (i.e. one block) and those zones on the periphery of the study area, which may be six square miles or greater. As a result, census block groups were chosen as the level of geography for the Encompass 2035 Plan EJ analysis, as they are more consistent in size and conform to something similar to a neighborhood.

In order to assess the effects of the Encompass 2035 plan, staff created a map of environmental justice areas and non-environmental justice areas utilizing data gathered on traditionally underserved populations within the OCARTS region. Block groups were identified that had over a 50% minority population and/or income 80% or less of the State Per Capita average. Staff then analyzed how the proposed Encompass 2035 transportation improvements were to be allocated throughout the OCARTS area in regards to the EJ areas and the non-EJ areas. Specifically, staff analyzed the following modal improvements: street and highway, transit, bike, and sidewalk.

ENVIRONMENTAL JUSTICE (EJ) BLOCK GROUPS

There are 824 census block groups in the OCARTS area (2000 Census). When the minority/low income definitions were applied to the block groups, 424 block groups were categorized as either minority, low income, or both. Over 435,000 people, or 44% of the area's population, are located within those block groups.

Table 1: EJ Area Population

Data	EJ Area	Non-EJ Area	Total
Population	435,298	555,266	990,564
% of Population	44%	56%	100%

STREET AND HIGHWAY

Encompass 2035 suggests that between 2005 and 2035, approximately 1,023 lane miles will be added to the region's street and highway network.

While street and highway improvements will be added throughout the OCARTS area, the majority will occur in the higher growth areas in the north and southwest parts of the region. Table 2 reveals that only 35% of the lane miles will be added adjacent to or within EJ areas. This suggests that minority/low income populations within EJ areas are being underserved. However, it should be noted that a majority of the EJ population is located in the urban built environment. As a result, there is less opportunity for street improvements because most section line roads have already been widened to four lanes. Despite this fact, the Encompass 2035 Plan does assume that EJ/non-EJ areas alike will receive three cycles of maintenance over the course of the Plan (2015, 2025, and 2035).

Table 2: Street and Highway Lane Miles Added

	EJ Area	Non-EJ Area	Total
Lane Miles	356	667	1,023
% Lane Miles	35%	65%	100%

TRANSIT

Determining the future transit changes for fixed routes over the 30 years of the Plan is a difficult task. Unlike street and highway improvements, transit service projects, such as future route changes are not typically submitted. The only fixed route project submitted for inclusion in the Encompass 2035 Plan was Oklahoma City's proposed downtown streetcar project included in Oklahoma City's Metropolitan Area Projects 3 (MAPS3) initiative. However, at the time of 2035 Plan's development, the alignment and technology had not been determined.

As a result, the current service routes from the region's major transit service providers: METRO Transit, CART and CityLink were used to analyze the level of service provided to the EJ areas. Express routes from Norman and Edmond to Oklahoma City were also included.

Overall, 250 miles, or 97 percent, of the 258 miles of existing transit routes fall within or adjacent to EJ areas. EJ areas located on the periphery of the OCARTS area receive little service, however.

Table 3: Transit Route Miles

	EJ Area	Non-EJ Area	Total
Route Miles	250	8	258
% Route Miles	97%	3%	100%

BICYCLE

The bicycle mode of travel has received greater emphasis in Central Oklahoma in recent years. That has led to communities developing bike plans and adding bike facilities. Also, the Encompass 2035 Plan gives additional consideration to street projects that include a bike element. As a result, nearly 400 miles of bicycle facilities are planned over the next 30 years. These improvements will include: bike lanes (220 miles), bike routes (123 miles), and trails (56 miles). Table 4 reveals that nearly 53% of the mileage of these facilities will be located in EJ areas.

Table 4: Total Bicycle Facilities Mileage

	EJ Area	Non-EJ Area	Total
Facility Miles	596	530	1,126
% Facility Miles	53%	47%	100%

SIDEWALKS

The Encompass 2035 Plan stresses the importance of sidewalks in Central Oklahoma. Indeed, improving the pedestrian environment will enhance the quality of life and will provide an important transportation option.

Sidewalk improvements have not been evaluated as part of the EJ analysis in past regional transportation plans primarily due to the lack of sidewalk data available from OCARTS member local governments. While a comprehensive sidewalk inventory is still not available, ACOG staff did evaluate independent sidewalk projects submitted for inclusion in the Encompass 2035 Plan, as well as street and highway projects that incorporated a pedestrian element.

There are approximately 1,211 miles of sidewalk projects proposed in the Encompass 2035 Plan.

Almost 48 percent, or 584 miles of new sidewalk facilities are within or adjacent to EJ areas.

Table 5: Total Sidewalk Mileage

	EJ Area	Non-EJ Area	Total
Facility Miles	584	627	1,211
% Facility Miles	48%	52%	100%

CONCLUSION

An evaluation of all improvements in the Encompass 2035 Plan reveals that only street and highway improvements may be disproportionately located outside of EJ areas. However, as explained earlier in this report, the reason for this discrepancy is due to the fact that most of the EJ population is located within the urban built environment where many of the section line roads have already been widened to four lanes. Table 6 demonstrates that transit, bike and sidewalk improvements are all within the EJ percent population threshold.

Table 6: Comparative Table

	EJ Areas	Non-EJ Areas	Total
% Population	44%	56%	100%
Street and Highway	34.8%	65.2%	100%
Transit	96.8%	3.2%	100%
Bike	52.9%	47.1%	100%
Sidewalk	48.3%	51.7%	100%

Appendix

Central Oklahoma CEDS Plan Update and Project Evaluation Process

The process for developing the Central Oklahoma Comprehensive Economic Development Strategy was open, inclusive and regionally-driven. It included input from a significant number of public and private sector partners. The role played by the Association of Central Oklahoma Governments (ACOG), as the (future) designated Economic Development District organization, involved facilitating the process, compiling the information and developing the recommendations of the Advisory Committee and the Board of Directors.

Evaluation

After the Central Oklahoma CEDS is approved by U.S. EDA, ACOG will conduct an evaluation of the CEDS planning process on an annual basis. The evaluation will assess how the region is fairing, how well it is adhering to the recommendations and what, if any, modifications need to be made to the recommendations and priorities for the region. The results will be reported to EDA and the CEDS Plan may be updated and revised. The Central Oklahoma CEDS update will also monitor any active or past EDA-funded projects to measure their impact and effect on the Central Oklahoma region.

Revisions

The Central Oklahoma CEDS will be updated annually. It can be amended to accommodate unforeseen circumstances, such as natural disasters, major economic adjustments, or rapid changes in national priorities. Any changes to the CEDS will need the approval of the ACOG Board of Directors.



ACOG EDD Proposed Action Plan

Collaboration has always been and continues to be the underlying principle of the economic development approach for the Central Oklahoma region. Understanding that economic activity extends beyond governmental boundaries, the partners and stakeholders of the future ACOG Economic Development District will work in collaboration on developing and implementing successful economic development strategies that correspond with U.S. EDA's investment priorities.

Based on the structure established by the goals and objectives of the Central Oklahoma CEDS, the ACOG EDD has outlined a proposed action plan. The section below discusses the major work elements of the proposed District.

Information Clearinghouse

ACOG EDD will provide information on economic development news and trends to Central Oklahoma stakeholders.

- Best available economic development data.
- Financial, technical assistance and information resources.
- Emerging opportunities.

Grant Development

ACOG EDD will work with EDA and local communities to develop quality, high profile projects.

- Develop project applications within the region.
- Establish an outreach program and develop relationships with local partners to increase interest.
- Provide technical assistance as appropriate, including administration of awarded grants.

Communications

ACOG EDD will communicate with U.S. EDA and collaborate on developing strong projects.

- Communicate with Central Oklahoma stakeholders, promote successful projects, conduct board meetings and develop ACOG EDD as a brand of trust.

Administration

ACOG EDD will maintain a professional and organized staff and program of work.

- Maintain and improve effective budgeting and spending in coordination with the ACOG EDD Board and its objectives.
- Maintain physical files in a well-organized manner.
- Maintain network computer files in a well-organized manner.
- Maintain comprehensive and current technical assistance reporting journal.
- Maintain grant compliance and reporting deliverables and applications.
- Develop a comprehensive annual work schedule.

Technical Assistance (TA)

ACOG EDD will provide staff support to develop and monitor projects that will increase economic opportunities within the Central Oklahoma region. Priority will be placed on EDA grant applications.

- Develop an efficient technical assistance program.
- Make visits around the Central Oklahoma region and be available for meetings and public speaking engagements.
- Maintain and improve communication with regional economic development organizations, state and federal agencies.
- Provide general economic development technical assistance to all eligible entities in the ACOG region.
- Provide technical assistance as appropriate on EDA or other grants.
- Partner with other programs to leverage capacity in the region.
- Establish an effective means of referral of technical assistance services.
- Maintain current information on federal, state and local economic development programs with a special emphasis on EDA programs.