



THE ASSOCIATION OF CENTRAL OKLAHOMA GOVERNMENTS

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

2024



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ASSOCIATION OF CENTRAL OKLAHOMA GOVERNMENTS
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ABOUT ACOG

The Association of Central Oklahoma Governments (ACOG) has a long history of bringing communities together to solve the common issues facing the residents of Central Oklahoma. ACOG was created in June 1966 by local governments under authority provided by the State to lead regional collaboration in Central Oklahoma. ACOG was established to aid local governments in planning for common needs, cooperating for mutual benefit, coordinating for sound regional development, and to serve as a clearinghouse for state and federal funds.

In 2013, ACOG was designated as an Economic Development District (EDD) from the U.S. Economic Development Administration (EDA). In 2019, ACOG branded its EDD as the Capital Area Economic Development District (CAPEDD) of Oklahoma and published its 2019 Comprehensive Economic Development Strategy (CEDS) with COVID-19 updates in 2021. CAPEDD is synonymous with the four-county-ACOG region.

Through various grant funding mechanisms, membership dues, and service fees, ACOG administers four major service areas: 911 & Public Safety, Community & Economic Development, Transportation Planning Services (Metropolitan Planning Organization – MPO), and Water Resources.

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Capital Area Economic Development District



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FOR MORE INFORMATION ON THE ACOG COMPREHENSIVE ECONOMIC RESILIENCY INITIATIVE REPORT, PLEASE VISIT ACOGOK.ORG/CEDS

EXECUTIVE SUMMARY

The 2024 Comprehensive Economic Development Strategy (CEDS) for the Capitol Area Economic Development District (CAPEDD), provides a blueprint for inclusive, resilient, and sustainable economic growth across the region. This strategy emphasizes collaboration, innovation, and equity to harness the region’s strengths while addressing its challenges.

REGIONAL VISION

Central Oklahoma is known for its low cost of living, rich Native American and Western culture, vibrant public art, thriving sports scene, and strong public investment, balancing quality of life with robust economic growth that equitably benefits businesses and residents.

KEY STRENGTHS

- **Dynamic Economy:** Diverse industry clusters include Aerospace and Aviation, Biotechnology and Healthcare, Logistics, and Energy.
- **Strategic Location:** Positioned as a logistics hub with access to key national transportation networks due to its central location.
- **Affordable Living:** Low cost of living and high quality of life attracts talent and investment.
- **Cultural and Recreational Assets:** Unique assets such as the Oklahoma River, the NBA Thunder, and cultural heritage sites including the First Americans Museum (FAM).
- **Public Investment:** Transformative Metropolitan Area Projects (MAPS) investments totaling over \$7B.
- **Educational Resources:** Over 15 higher education institutions and a top-tier career and technology educational system, CareerTech.

CHALLENGES IDENTIFIED

- Insufficient public transit and aging infrastructure.
- Workforce gaps in skilled labor, especially in high-growth sectors.
- Housing affordability pressures and rising property insurance costs.
- Environmental risks including extreme weather and air quality concerns.
- Fragmented collaboration among regional stakeholders.

OPPORTUNITIES FOR GROWTH

1. **Tourism and Cultural Heritage:** Investments in attractions like the First Americans Museum and RIVERSPORT bolster tourism-driven economic gains.
2. **Workforce Development:** Programs like BioTC and CareerTech initiatives prepare residents for emerging industries.
3. **Innovation Economy:** Expansion of Oklahoma City’s Innovation District fosters technological advancements and equitable growth.
4. **Infrastructure Investment:** Broadband expansion and public transit improvements enhance connectivity.
5. **Energy:** A legacy in oil and gas complemented by growth in renewable technologies positions the region as a leader in the energy sector.

STRATEGIC GOALS

1. **Affordable Living & Quality of Life:** Address cost-of-living challenges, improve housing affordability, increase housing supply, explore building code reform, and support placemaking initiatives.
2. **Workforce Development:** Encourage collaboration and coordination of resources, align education and training programs with industry needs to build a skilled, equitable workforce, and leverage a diverse pool of funding, including the private, nonprofit, and public sectors.
3. **Economic Diversification:** Leverage partnerships for technology and innovation, maximize key investments, strengthen key industries, promote entrepreneurship, and advance rural development projects.

PATH FORWARD

Through collaboration with public, private, and nonprofit partners, this CEDS outlines a clear action plan to address regional needs and capitalize on emerging opportunities. By leveraging its assets, addressing vulnerabilities, and fostering innovation, Central Oklahoma can achieve long-term economic resiliency and prosperity.

This strategy encourages local officials, businesses, and community stakeholders to collaborate in creating a region that prospers across economic, social, and environmental dimensions.



ABOUT THE CEDS

This Comprehensive Economic Development Strategy (CEDS) is a document for the Capital Area Economic Development District (CAPEDD), updated every five years, that charts a course for our region’s future. It allows partners and stakeholders throughout the district to align around shared priorities. This alignment positions our region to leverage investment from local and federal governments. The strategy identifies regional needs, actions necessary to address those needs, and organizations with the ability to lead those actions.

HOW TO USE THE CEDS

- **Inform:** The plan will be used to engage elected officials and business leaders to help amplify the vision and provide support through actions.
- **Invest:** The strategy will be used to leverage greater investment in regional priorities by providing data and rationales that can be used to obtain grants to fund implementation and align federal and states’ legislative agendas to cooperatively solicit funding.
- **Collaborate:** The work will engage organizations and departments within agencies and jurisdictions to break down silos and leverage resources to the greatest extent possible to elevate one another’s work.



CEDS is a strategy-driven plan for regional economic development and is the result of a regionally-owned planning process designed to guide the economic prosperity and resiliency of an area.

CEDS: A BLUEPRINT
A blueprint to grow, strengthen and diversify the economy of Central Oklahoma

CEDS REPORT ABOUT THE CEDS

GUIDING PLANS & REGIONAL ALIGNMENT

This CEDS is informed by many relevant planning documents across sectors. These include, but are not limited to, the following:

- **Forward VI OKC Chamber, 2021-25**
- **Oklahoma Business Leaders Poll, 2023**
- **Innovation District Connectivity Master Plan, 2023**
- **State of Oklahoma Emergency Operations Plan, 2019**
- **ACOG Cost of Nonattainment Study, 2022**
- **ACOG Encompass 2045 and 2050**
- **ACOG Regional Safety Plan**
- **planokc/adaptokc/sustainokc and component plans**
- **2021-2026 Science & Innovation Strategic Plan**
- **Aging Our Way: Oklahoma’s Multisector Plan on Aging**
- **Oklahoma Long Range Transportation Plan 2020-2045**
- **Rural Housing Initiative - A Collaborative Effort**
- **Internet for All: Five Year Action Plan for Oklahoma, 2023-2028**
- **Cheyenne and Arapaho Tribes CEDS 2023-28**
- **The Future of Transportation: Maximizing Oklahoma’s Potential in the EV Supply Chain**
- **Housing Supply Accelerator Playbook, 2024**
- **Heartland Flyer Corridor ID Study, 2023**
- **Four-Year Regional and Local Plan for Central Oklahoma Workforce Innovation Board (COWIB), 2024**

REGIONAL VISION



CENTRAL OKLAHOMA IS KNOWN FOR ITS LOW COST OF LIVING, RICH NATIVE AMERICAN AND WESTERN CULTURE, VIBRANT PUBLIC ART, THRIVING SPORTS SCENE, AND STRONG PUBLIC INVESTMENT, BALANCING QUALITY OF LIFE WITH ROBUST ECONOMIC GROWTH THAT EQUITABLY BENEFITS BUSINESSES AND RESIDENTS.



SUMMARY BACKGROUND

The Capitol Area Economic Development District (CAPEDD) is the most populous and economically dynamic area in the state. Oklahoma City, the state capital, is located within Oklahoma County, making the region a key political and economic hub. The district is comprised of four counties: Logan, Oklahoma, Canadian, and Cleveland.

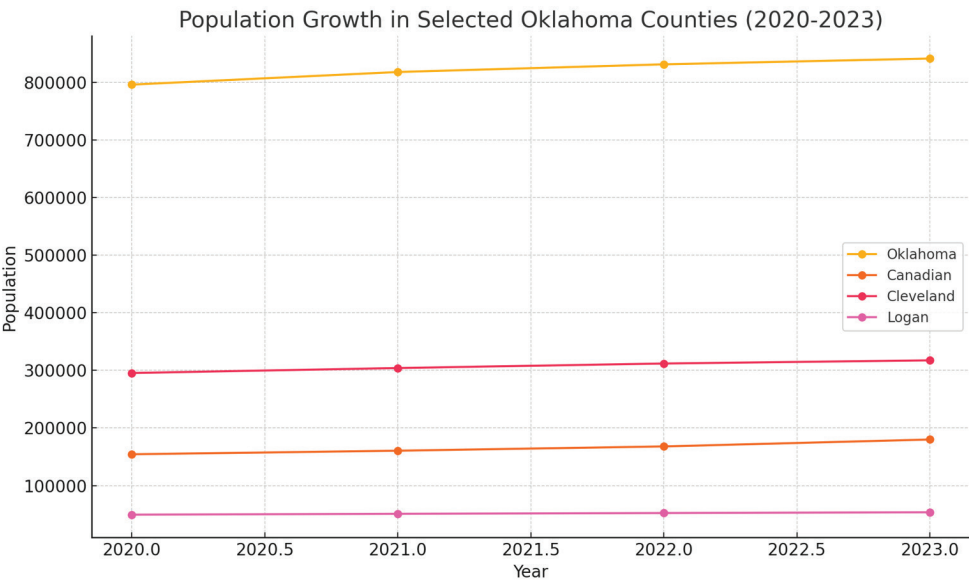


Canadian County: Leading the state in growth, Canadian County expanded by 13% since 2020. Its growth is attributed to the appeal of a suburban lifestyle with city amenities, along with new investments in infrastructure and schools to support the growing population.

Cleveland County: With Oklahoma’s third-largest population, Cleveland County has experienced steady growth of approximately 1.7% from 2020 to 2023. This growth rate supports its role as a core residential area within the metro, particularly around Norman, where the University of Oklahoma is located.

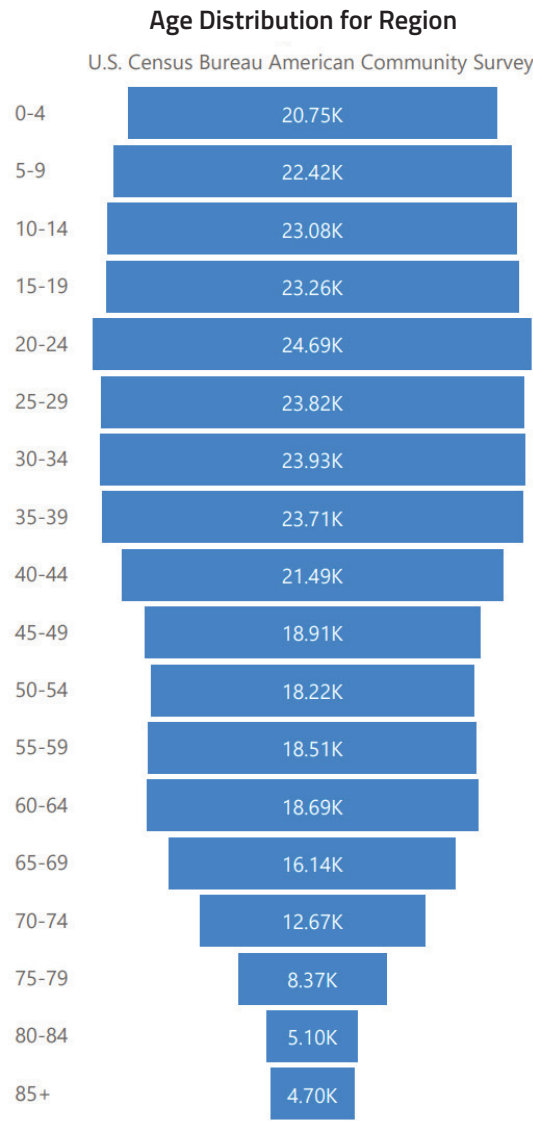
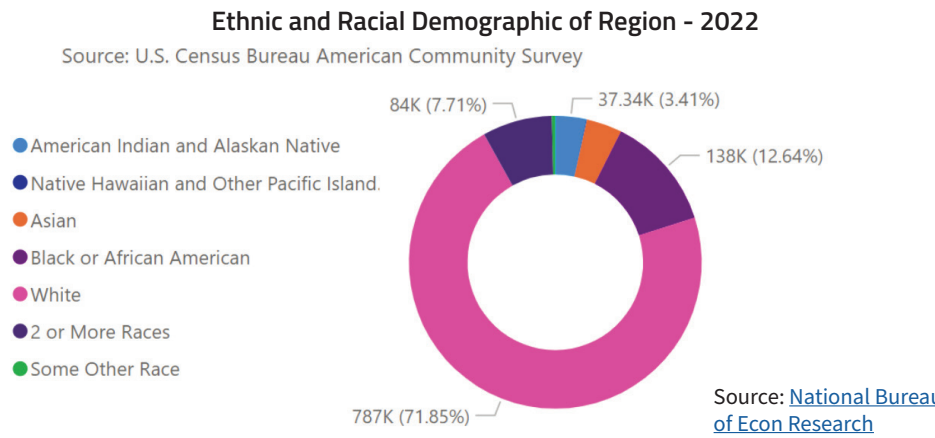
Logan County: Anchored by the county seat of Guthrie, with its rich historically preserved built environment, Logan County is one of the fastest-growing rural counties in Oklahoma, increasing by about 6.6% over the same period.

Oklahoma County: Oklahoma County experienced a growth of approximately 1.3%, largely fueled by urban development and population increases in Oklahoma City.

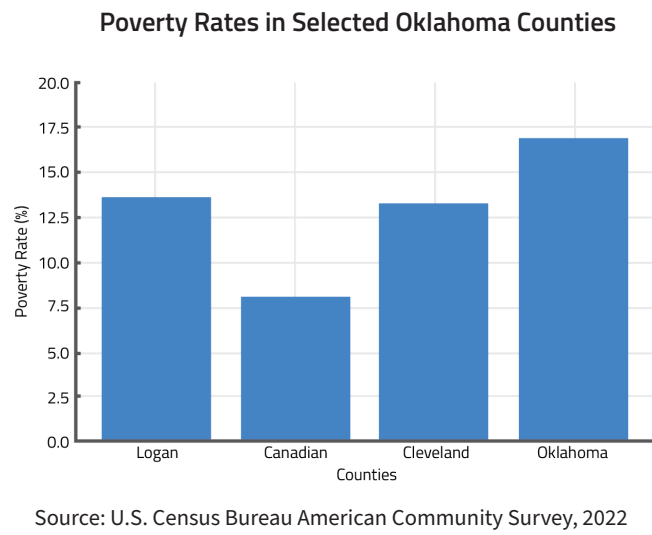
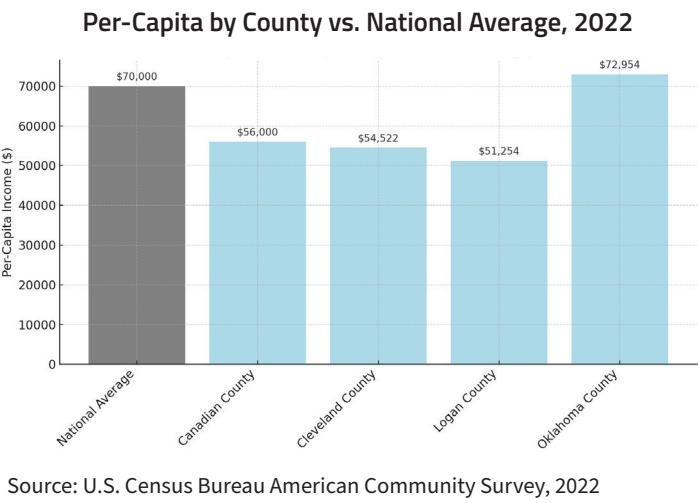


From 2020 to 2023, Central Oklahoma counties have shown notable population growth. Regional Population Growth, 2020-2023. Source: U.S. Census Bureau.

The region’s population has grown increasingly diverse. Ensuring that our community is welcoming to and inclusive of residents of all racial and ethnic backgrounds is an important consideration in terms of quality of life. A study by the National Bureau of Economic Research has shown that cultural diversity leads to more vibrant, innovative, and entrepreneurial communities.



Source: U.S. Census Bureau and IndexMundi, 2022



The age distribution in Oklahoma, Logan, Canadian, and Cleveland Counties reveals both opportunities and challenges for workforce planning. The Oklahoma City metro area shows significant growth in younger adults and mid-career age groups, which strengthens the workforce pool. For example, millennials (ages 25-39) make up a substantial portion of the state’s population, contributing a sizable workforce base in Canadian and Cleveland Counties.

However, aging populations are also expanding, especially among those over 65, whose numbers grew by 12.4% from 2017 to 2022. This shift means that while younger age groups are reinforcing the workforce, retirement is also increasing. The growing senior population can create a need for more healthcare and support services, while potentially reducing workforce participation in years to come as more residents transition out of active employment.

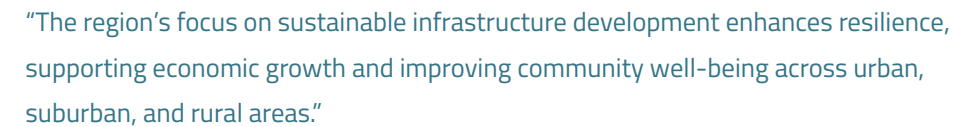
Canadian County stands out with the highest median household income of approximately \$82,364, followed closely by Cleveland County at \$71,757, both above the state average of \$59,673. Oklahoma County’s median household income is \$59,000, aligning closely with the state median, while Logan County has a median income slightly below the state average at \$57,500.

Canadian County has the lowest poverty rate at 7.3%, indicating stronger economic stability. Cleveland County has a moderate rate of 13.3%, while Oklahoma County has a higher rate at 16.9%. Logan County, largely rural, also has a relatively low poverty rate of around 10.4%. Poverty rates are higher in the Black, Native American, and Hispanic communities, so income regionally is still inequitable.

Central Oklahoma's diverse geographic landscape includes four distinct ecoregions: Northern Cross Timbers, Cross Timbers transition, Prairie Tableland, and Northwestern Cross Timbers. Most of the grasslands have been converted for agriculture, with only about 5% of natural habitat remaining. This area was so heavily overcultivated that it was damaged during the 1930s Dust Bowl period in which the topsoil was blown away in dust storms. The grasslands have since recovered but are cropland and managed grazing ranges rather than unspoiled native grasses and perennials pasture. In the Cross Timbers ecoregion, land use is a mixture of rangeland, pastures, and farmland. The area has also historically been an important site of oil extraction.

In June 2013, the Oklahoma River became the first water racecourse in the world with permanent stadium lighting, a MAPS 3 project that makes it possible to host national and international night racing events. It is also designated as a U.S. Olympic and Paralympic Training Site for both rowing and canoe/kayak.

An aerial photograph of the University of Mississippi's aquatic center. The facility includes a large, modern white building with a distinctive angular design, a swimming pool, and a water slide. The center is located on a grassy area adjacent to a wide river. A parking lot with several cars is visible in the foreground, and a road runs along the riverbank. In the background, a train yard with various colored railcars is visible, followed by a residential area with houses and trees.



A perspective view of the Route 66 Bridge, showing the road stretching into the distance under a clear blue sky. The bridge features yellow-painted steel truss structures and railings. Long shadows are cast across the asphalt road surface.

BROADBAND

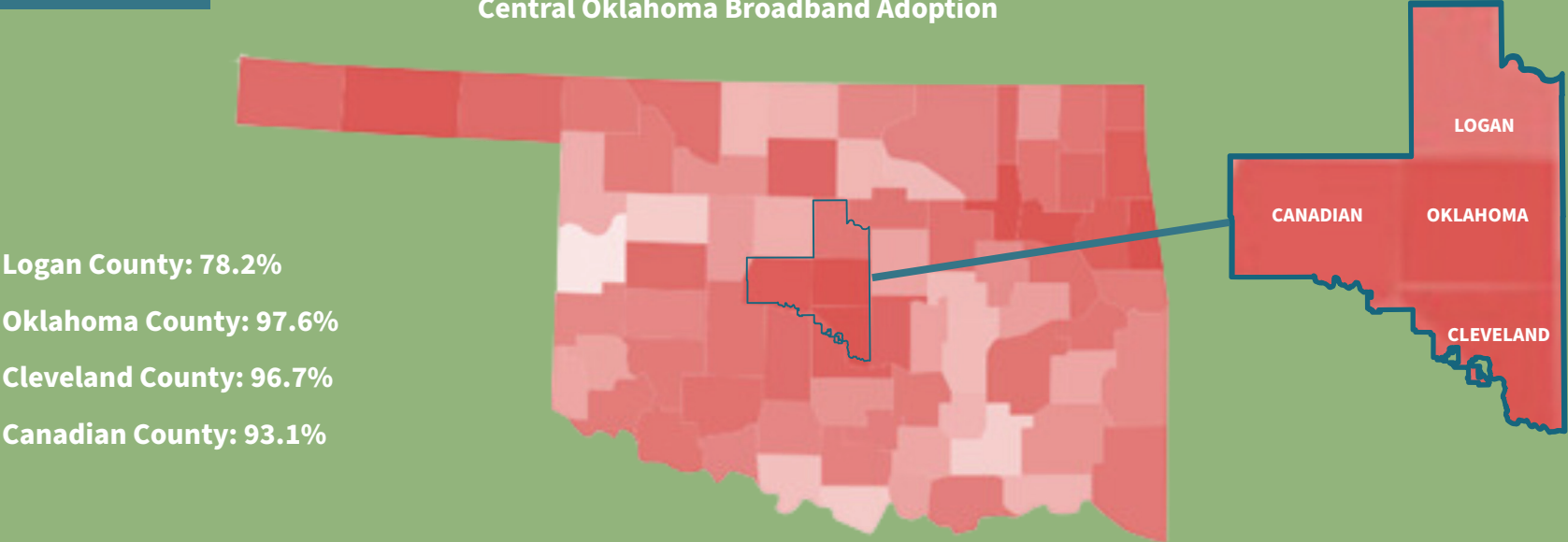
The expansion of broadband services is a consensus regional priority that supports economic development and digital connectivity in less urbanized areas. The Oklahoma Broadband Office is currently overseeing BEAD (Broadband Equity Access and Deployment) implementation, a \$797.4M project administered by the National Telecommunications and Information Administration (NTIA) of the US Department of Commerce to expand high-speed internet access. The Challenge Phase of the BEAD plan culminated in

October 2024, and Eligible Determination Locations will be finalized in January 2025. A current snapshot of digital adoption status regionally is shown below, using the FCC metric of 25 megabits per second (Mbps). While universal broadband access is a key component of a digitally equitable society, it is only the beginning. It is inequitable if good internet service is offered in an area but at cost-prohibitive price, or if suitable devices for getting online or the skills to use the internet to

meet basic needs are lacking. The strategies for digital equity must also address preparing all citizens to thrive online, as the internet becomes a key — if not the principal — medium for all kinds of interactions among citizens, their employers, educators, the government, and access to much of their shopping and entertainment options.

SOURCE: BROADBANDNOW.COM, 2024

Central Oklahoma Broadband Adoption



ECONOMIC SECTORS & INDUSTRY CLUSTERS

AEROSPACE & AVIATION

Research and development in aerospace have been ongoing in the region for decades, with a particular focus on unmanned systems in the most recent decade. Oklahoma’s legacy of aviation leadership includes aviation pioneers like Clyde Cessna and Wiley Post, and it was leadership from Oklahoma U.S. Senator Mike Monroney that led to the creation of the Federal Aviation Administration (FAA) in the 1950’s. Today, the Central Oklahoma region is home to the **FAA’s Mike Monroney Aeronautical Center**, one of the largest FAA organizations and sites outside of Washington D.C.

Tinker Air Force Base has a significant economic impact on Oklahoma as the state’s largest single-site employer, generating an annual economic impact estimated approximately \$6.69 billion, including a direct payroll of over \$1.8 billion and substantial spending on locally produced goods and services. This impact is attributed to the large workforce employed at the base, drawing employees from across 44 Oklahoma counties.

Aviation is now – and has always been – an important part of the Oklahoma economy. Leveraging this with Oklahoma’s leadership in weather and atmospheric research at the National Weather Center in Norman, OK provides much-needed weather information and data to enable research and public safety to support this technology/industry area.

Oklahoma: A Hub for Aerospace Innovation

Pioneering Unmanned Systems & Aviation Leadership

LOGISTICS

The Central Oklahoma region is a major hub for logistics because of its prime location. Located in the geographic center of North America, the United States and the growing south-central region, Oklahoma City sits at the junction of three of the nation’s major interstates (I-35, I-40 and I-44) and is equidistant from the east and west coasts and major trade partners of Canada and Mexico. All major trade hubs and more than 411 million residents are within 1,800 miles of Oklahoma City. From Oklahoma City, companies have access to more than 4 million people within a 2.5-hour drive and most of the U.S. can be reached within a two-day trucking distance. Major employers include Amazon and UPS. Wages in the Logistics sector total over \$2.B, and 36,000 are employed.



Natural Gas Cryogenic Processing Plant, Oklahoma

ENERGY

The energy sector, historically dominated by oil and gas, is evolving with increased investments in renewable energy sources, particularly wind energy, which has become a growing industry in the region. As the premier gateway to the nation’s “Wind Corridor,” the area offers a powerful, sustainable combination of technical manufacturing proficiency and a developing workforce; centralized, readily accessible locations; raw ingredients to power the world today and tomorrow, like CNG, wind, and solar; Major employers include Devon Energy, Enel North America, and Kimray Inc.; and one of the most high-value environments for solar/wind manufacturing and logistics.

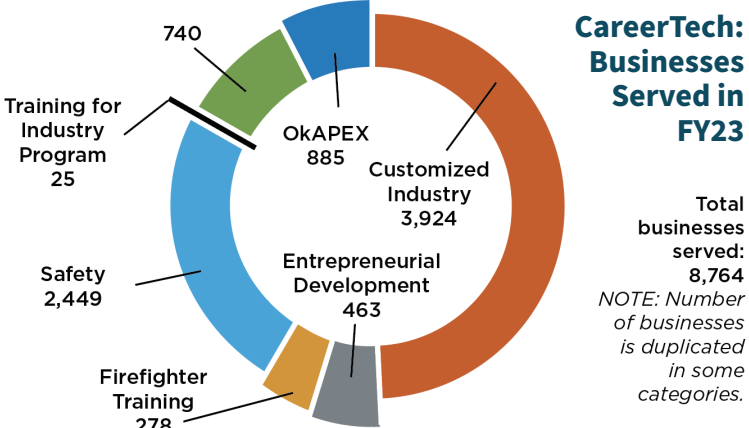
BIOTECHNOLOGY

Ground-breaking discoveries made by Oklahoma City-based researchers have helped put the region on the map as a contender in the bioscience and technology marketplace. One of the most significant factors in this area’s biotech boom is the powerful symbiotic relationship between entrepreneurs, clinical researchers, academic investigators, and public and private investors.

In recent years, significant medical advances and life-saving medicines have been developed in labs and facilities based in Oklahoma City, such as the Oklahoma Medical Research Foundation. Most recently, a diverse group of community partners worked together to help win a \$35-million EDA grant through the Build Back Better Regional Challenge to boost the region’s emerging biotech sector. Total employment in the Biotechnology sector is 34,000, and wages total \$2.7B. **See “Opportunities” section for more information.**

WORKFORCE DEVELOPMENT

The region has made great strides in equitable workforce development. The talent pipeline includes 215,000 diverse students from 15 colleges and universities and one of the country’s most sophisticated and best-ranked career technologies training programs – Oklahoma Department of Career and Technology Education (CareerTech). With its 14 locations in the region, CareerTech is a key player in helping to attract industry to Oklahoma through its Training for Industry Program (TIP). In 2023, 22,520 industry-endorsed certificates were earned. Other targeted workforce initiatives have sprung up to address specific business and industry needs, particularly biotechnology and technology.



CASE STUDY: BIOTC – INNOVATION DISTRICT

BioTC offers short-term training with a focus on hands-on experience and online resources. Unlike a college degree, the curriculum is streamlined and specific to the current needs of biotechnology facilities. This provides expert experience for a fraction of the cost and time. Upon completion of the program, these individuals will become immediately employable at various laboratories within the Innovation District. **The goal is to equip a diverse talent pool for the biomanufacturing industry, and for at least 1/3 of students to come from disadvantaged and underserved communities, such as BIPOC or Veterans.**

Despite this progress, a highly skilled and educated workforce remains a top concern for the region. In the CEDS Public Survey, 60% of respondents identified Workforce Development/Education as the region’s greatest economic challenge, and 57% said that Talent Retention and Attraction was a key economic challenge.

In 2023, the Business Leaders Poll by the State Chamber Research Foundation highlighted persistent challenges in meeting the demand for skilled positions

and a continuing shortage of durable skills within the workforce. In the poll of 418 business leaders, 81 percent identify workforce development as a top issue.

In 2023, to address the fragmented system of agencies and entities that address workforce needs, legislation creating the Oklahoma Workforce Commission was passed. The Commission, which

is comprised of nine members from the private sector, was tasked with administering the Workforce Coordination Revolving Fund, which was appropriated \$5 million to coordinate workforce development activities. The Workforce Commission will continue to coordinate and develop the state’s workforce, using public and private funds to carry out a focused workforce plan.



Innovation District

TARGET & COMPLEMENTARY SECTORS

All target sectors for the region, as identified by the Central Oklahoma Workforce Innovation Board (COWIB), are projected to grow by 2026, except for the energy sector. This projected demand for highly-skilled workers creates a clear mandate for continued robust investment in the region's workforce initiatives.

The Target Sector Projected Growth Table shows the estimated number of new jobs for each of the target sectors in 2026, along with the growth rate and average earnings per job in the target sector.



Source: Central Oklahoma Workforce Innovation Board (COWIB), 2024



“The greater Oklahoma City area emerges as a vibrant, affordable alternative for professionals seeking opportunity and quality of life in the heartland.”

Target Sectors: Central Oklahoma

TARGET SECTOR	2021 JOBS	2026 JOBS	ESTIMATED NET JOB GROWTH (2021-2026)	GROWTH RATE (2021-2026)	AVERAGE EARNINGS PER JOB
Aerospace and Defense	26,605	28,696	2,091	8%	\$97,833
Agribusiness and Bioscience	20,082	21,790	1,708	9%	\$72,256
Energy (Renewable and Traditional)	20,883	15,701	-5,182	-25%	\$123,774
Information and Financial Services	48,119	48,868	749	2%	\$100,701
Manufacturing	34,595	35,406	811	2%	\$78,208
Transportation and Logistics (Includes Automotive)	48,932	52,377	3,445	7%	\$69,073

Source: Lightcast – economicmodeling.com-2022.3, COWIB

AFFORDABILITY & QUALITY OF LIFE

Oklahoma City ranks fifth among the top 10 affordable cities serving as tech and finance outposts in the latest annual rankings from The Wall Street Journal in collaboration with Moody's Analytics. These rankings were derived from a comprehensive analysis considering five key metrics: unemployment rate, labor-force participation rate, changes in employment levels, labor force size and wages.

The OKC Metro's placement as the fifth-hottest job market highlights its emergence as an economic powerhouse

within the heart of the U.S. Despite not being a traditional tech or finance hub like Silicon Valley or New York City, **the Oklahoma City region has strategically positioned itself as an attractive destination for professionals seeking career opportunities coupled with a lower cost of living compared to coastal cities.**

The OKC Metro's affordable housing market and relatively lower cost of living make it an appealing choice for both established professionals and young graduates looking to establish

themselves without the financial burden often associated with larger metropolitan areas. This affordability factor, combined with a strong sense of community and quality of life amenities (parks, cultural attractions, and recreational opportunities), enhances the area's attractiveness as a place to live and work.

Smaller, non-coastal cities are seeing success in attracting white-collar workers from high-cost areas like the San Francisco Bay Area and Los Angeles, reflecting a broader shift where professionals prioritize quality of life and lower living costs over being near traditional tech and finance hubs. **This trend presents a great opportunity for Central Oklahoma, with its affordable housing, expanding job market, and thriving community. The region is well-positioned to benefit from this shift in what people value when choosing where to live and work.**

CONCLUSION

Central Oklahoma is a dynamic region with significant assets and opportunities for growth. By leveraging its human capital, cultural heritage, and strategic location, the region is well-positioned to continue its trajectory of robust economic development. The CAPEDD CEDS will serve as a roadmap to enhance regional collaboration, address challenges, and capitalize on emerging opportunities to ensure long-term economic resiliency and prosperity.





STRENGTHS - WEAKNESSES - OPPORTUNITIES - THREATS ANALYSIS

SWOT ANALYSIS: STRENGTHS

MAPS PROJECTS: A TRANSFORMATIVE CATALYST IN CENTRAL OKLAHOMA

In 1993, Oklahoma City residents approved a penny sales tax to fund the development and enhancement of cultural, sports, recreation, entertainment, and convention facilities. This investment sparked a revitalization of the city’s core and significantly boosted the region’s image on the international stage. The impact of this public investment in Central Oklahoma has been profound, serving as a transformative catalyst for regional growth and economic development.

While the projects of each program are different, the method and goal remained the same: use a limited-

term, 1-cent sales tax to build transformational projects – all debt free. The result of that initial public investment was substantial private investment. An analysis by RegionTrack released in November 2019 found the impact of Oklahoma City’s investments in MAPS totals more than \$7 billion. Approximately \$1.8 billion in city investment has been used or earmarked for the three rounds of MAPS projects in Oklahoma City.

Additional city infrastructure expenditures in the period totaled \$690 million and worked to enhance the outcome of the MAPS projects. Other federal, state

and local government entities invested an additional \$600 million in the downtown area. **Total public investment through city spending on MAPS and investments by other public sector entities reached \$3.1 billion between 1995 and 2018.**

The original maps projects, totaling \$350M, included Chickasaw Bricktown Ballpark, Bricktown Canal, Cox Convention Center, Paycom Center, Civic Center Music Hall restoration, State Fairgrounds Improvements, Ronald J. Norick Downtown Library, Oklahoma River enhancements, and the Downtown Street Car.

PUBLIC ART

Central Oklahoma’s public art landscape has flourished with initiatives like Oklahoma City’s 1% for Art ordinance, which allocates 1% of eligible public project budgets to fund art. Since its passage in 2009, the ordinance has spurred the creation of numerous iconic installations, many of which are associated with MAPS projects. Oklahoma City’s success with Public Art as a tool for placemaking has inspired many other community projects across the region, including Yukon’s Creative Crosswalks, the El Reno Walls Mural Project, and the Oklahoma Territorial Museum mural “A New Day” in Guthrie. Norman passed the Norman Forward 1% for Art program in 2015, which has funded numerous projects such as sculptures, bike racks, and murals.



MAPS 3

MAPS 3 projects totaling \$777M are concluding in 2024. Originally approved in 2009, the increased focus of MAPS 3 on lifestyle amenities such as Scissortail Park, wellness centers and biking trails underscores the range of items beyond traditional infrastructure that characterize today’s great cities in which to live and work. Projects included: a new Convention Center, Scissortail Park, Oklahoma City Streetcar, Oklahoma State Fairground Improvements, Senior Health & Wellness Centers, Oklahoma River Improvements, Civic Center Improvements, Trails, and Sidewalks.



Scissortail Park
MAPS 3 Project



Clara Luper Civil Rights Center
MAPS 4 Project

MAPS 4

Oklahoma City voters approved the sales tax to fund MAPS 4 in a 2019 special election, moving forward with a unique and ambitious plan to transform the community. The MAPS 4 Implementation Plan projects anticipates revenue for MAPS 4 at almost \$1.1 billion. The temporary penny sales tax funding MAPS 4 began April 2020, and ends in 2028.

In a departure from previous MAPS projects, there was an explicit effort to address community inequities in this round of MAPS projects — more

than 70% of MAPS 4 funding is dedicated to neighborhood and human needs. These projects include: services and facilities, investing \$25 million for the restoration of the Freedom Center building and the creation of a new Clara Luper Civil Rights Center, the Diversion Hub - a \$13M multi-agency network helping people to receive coordinated, life-stabilizing services as they navigate the criminal justice system, and the \$38M Palomar Family Justice Center, providing wraparound services to survivors

of domestic violence, child abuse, sexual assault, stalking, elder abuse and human trafficking. Additional projects include: Parks, Youth Centers, Senior Wellness Centers, Mental Health and Addiction Services and Facilities, Transit, Sidewalks/bike lanes/trails/streetlights, Homelessness, Paycom Center and related facilities, Animal Shelter, Fairgrounds Coliseum, Innovation District, Beautification projects, and a Multi-Purpose Stadium.



FOR INFORMATION ON THE HISTORY OF THE MAPS PROGRAMS, PLEASE VISIT
[HTTPS://WWW.OKC.GOV/GOVERNMENT/MAPS-3/MAPS-HISTORY](https://www.okc.gov/government/maps-3/maps-history)



FOR A CURRENT LIST OF MAPS 4 PROJECTS, PLEASE VISIT
[HTTPS://WWW.OKC.GOV/GOVERNMENT/MAPS-4/PROJECTS](https://www.okc.gov/government/maps-4/projects)

GEOGRAPHIC ADVANTAGES

Central Oklahoma, situated within the I-35 Megalopolis stretching from Kansas City to San Antonio, is a key hub for logistics operations. Its central location, at the intersection of I-35, I-40, and I-44, offers easy

access to major markets on both coasts. This strategic positioning supports efficient distribution of goods nationwide via both truck and rail.

DIVERSE INDUSTRIES

A key objective of previous CEDS is being accomplished: the continuing diversification of the region’s economy. While once heavily dependent on oil and gas, the region’s major industry clusters have expanded to include aviation and aerospace, bioscience, and logistics. Meanwhile the energy sector has evolved and now encompasses renewables and green technology.



COMPARATIVELY LOW COST-OF-LIVING

The **Cost-of-Living Index** is typically based on a score where 100 represents the national average. A score below 100 means the area is less expensive than the national average, while a score above 100 indicates it’s more expensive.

Logan County: The cost of living is slightly lower than the national average, with an estimated score of 89.5. Housing is a significant factor in this, as it is generally more affordable compared to other counties in the state.

Canadian County: This county has a cost-of-living index of 86.4, making it about 13.6% less expensive than the national average. Housing and general utilities in Canadian County are particularly affordable, driving down the overall cost of living.

Cleveland County: With a cost-of-living score of 88.4, Cleveland County is also below the national average. Housing is relatively affordable, with a median home price of \$223,200, which is 34% lower than the U.S. average.

Central Oklahoma provides an affordable cost of living, with housing and utilities significantly lower than the national average across multiple counties.



Oklahoma County: Oklahoma County, where Oklahoma City is located, has a cost-of-living score of 85.1. This is one of the lowest among large U.S. urban counties, making it an affordable option, particularly in housing and transportation costs.

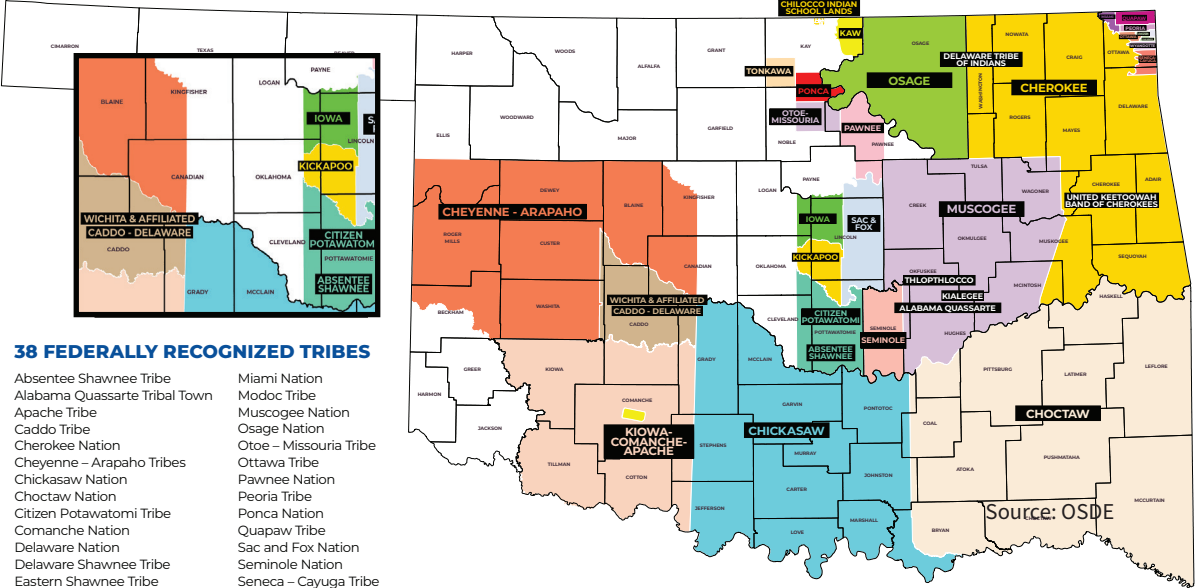


“The establishment of numerous innovation hubs in Central Oklahoma has significantly bolstered the region’s diversification efforts, fostering entrepreneurship and attracting tech startups that complement its traditional industries.”

TRIBAL NATIONS

Central Oklahoma has a rich historical and cultural heritage that is inextricably intertwined with Native American history. It is critical to recognize that the tribes in the region have an extensive and invaluable influence, not only preserving this heritage but also contributing significantly to the region’s economic, cultural, and social landscape.

The region was originally home to various indigenous tribes, including the Caddo, Wichita, and Plains Apache, long before European exploration. However, the most significant Native American presence in Central Oklahoma stems from the forced relocation of tribes under the Indian Removal Act of 1830. The late 19th century saw further erosion of Native sovereignty with the opening of Indian Territory to non-Native settlement through land runs, such as the famous Land Run of 1889, which led to the rapid establishment of cities in the region, including Oklahoma City. Today, Central Oklahoma is home to a diverse Native American population, and Native American culture remains a vibrant and integral part of Central Oklahoma’s identity.



38 FEDERALLY RECOGNIZED TRIBES

- Absentee Shawnee Tribe
- Alabama Quassarte Tribal Town
- Apache Tribe
- Caddo Tribe
- Cherokee Nation
- Cheyenne – Arapaho Tribes
- Chickasaw Nation
- Choctaw Nation
- Citizen Potawatomi Tribe
- Comanche Nation
- Delaware Nation
- Delaware Shawnee Tribe
- Eastern Shawnee Tribe
- Ft. Sill Apache
- Iowa Tribe
- Kaw Nation
- Kialegee Tribal Town
- Kickapoo Tribe
- Kiowa Tribe
- Miami Nation
- Modoc Tribe
- Muscogee Nation
- Osage Nation
- Otoe – Missouri Tribe
- Ottawa Tribe
- Pawnee Nation
- Peoria Tribe
- Ponca Nation
- Quapaw Tribe
- Sac and Fox Nation
- Seminole Nation
- Seneca – Cayuga Tribe
- Shawnee Tribe
- Thlopthlocco Tribal Town
- Tonkawa Tribe
- United Keetoowah Band of Cherokee
- Wichita & Affiliated Tribe
- Wyandotte Nation

Oklahoma Tribal Map

*The Euchee (Yuchi) Tribe is a State-recognized Tribe that is part of Muscogee Nation

ECONOMIC IMPACT

The economic contributions of the tribal nations to Central Oklahoma go far beyond gaming, which is often the most publicly visible aspect of their economies. Tribes invest in a wide range of industries including healthcare, real estate, retail, agriculture, and energy. Tribal governments operate as some of the largest employers in their respective areas, providing thousands of jobs not only to tribal citizens but also to non-Native residents. For example, tribal nations run healthcare facilities that serve both tribal and non-tribal communities, contributing to the overall health infrastructure of the region.

While tribal gaming enterprises attract significant revenue, the multiplier effect extends far beyond these operations. Revenues generated by tribal businesses are often reinvested into critical

infrastructure, education, housing, and social programs that benefit both Native and non-Native populations. Moreover, tribes in Oklahoma contribute heavily to public services through indirect taxes, payments in lieu of taxes, and partnerships with local governments.

A 2019 report by the Oklahoma Indian Gaming Association estimated that tribal nations contribute over **\$13 billion annually** to the state’s economy, but this figure doesn’t fully capture the range of tribal activities that extend beyond gaming. Local spending on education, environmental protection, cultural preservation, and health services is significant. Another study that we can extrapolate from is the **2019 Oklahoma Native Impact Report**, produced by Dr. Kyle Dean, Director of the Center for Native American and Urban Studies, Oklahoma City University. Much of the economic impact described occurs in Central Oklahoma, since Oklahoma City anchors the region as the largest city, state capital, and economic hub, but the data includes the entire state.

- Oklahoma tribes employed 54,201 Oklahoma workers in 2019, paying out wages and benefits of \$2.5 billion to Oklahomans.
- When combining business revenues, government expenditures, and capital expenditures, Oklahoma tribes accounted for \$8.3 billion in direct Oklahoma production. When analyzed in the context of the Oklahoma economy and accounting for spillover (multiplier) impacts, it is estimated that tribal activities supported:
 - 113,442 jobs in the state
 - \$5.4 billion in wages and benefits to Oklahoma workers
 - \$15.6 billion in state production of goods & services

CULTURAL & HISTORICAL IMPACT

The economic influence of tribal nations is intertwined with their cultural and historical significance. Oklahoma is home to 38 federally recognized tribes, many of which were forcibly relocated to the region in the 19th century. This history of resilience and cultural preservation has left an indelible mark on the state. Tribal nations are not only stewards of significant cultural landmarks and historical sites, but they also

actively invest in the preservation and promotion of Native culture through museums, educational programs, and cultural festivals.

The cultural contributions of tribal nations enrich the region’s identity and create an environment that attracts tourism, arts, and education. Cultural tourism related to Native American history and contemporary culture provides a unique draw for visitors and

contributes to local economies. Initiatives such as the \$175M, 175,000-square-foot First Americans Museum (FAM) in Oklahoma City provide vital educational opportunities and promote cultural understanding, further strengthening ties between the tribes and the wider community. FAM serves as an anchor for tourism and a catalyst for visitors to explore other cultural attractions throughout Central Oklahoma.

HEALTHCARE CASE STUDY: INDIAN HEALTH SERVICE IN CENTRAL OKLAHOMA

The Oklahoma City Area Indian Health Service covers the states of Oklahoma, Kansas, and portions of Texas. The Area consists of eight Service Units with federally-operated hospitals, clinics and smaller health stations, including the Oklahoma City Indian Clinic (OKCIC). The clinic currently employs nearly 350 staff members,

who serve over 22,000 patients representing over 220 different tribes. OKCIC is increasing positive health care outcomes for American Indians in Central Oklahoma while maintaining health care costs.

The Central Oklahoma area is also home to Urban Clinics and Urban Demonstration Projects which operate like Service Units. All the Urban Clinic facilities are Federally Qualified Health Centers, which provide ambulatory outpatient health care to urban native communities.



The Federal Health Program
for American Indians and Alaska Natives



Source: OSDE

ENVIRONMENTAL STEWARDSHIP

Another area where tribal nations have an outsized impact is environmental stewardship. Many tribal governments in Oklahoma lead the way in sustainability practices, natural resource management, and environmental conservation. Their deep-rooted connection to the land informs their approaches to agriculture, energy production, and environmental protection. These initiatives not only preserve natural resources but also provide sustainable economic opportunities for the region.



CEDS: A BLUEPRINT
A blueprint to grow, strengthen and
diversify the economy of Central Oklahoma

CEDS REPORT
SWOT ANALYSIS: STRENGTHS

CHALLENGES IN MEASURING TRIBAL ECONOMIC CONTRIBUTIONS

The full scope of tribal economic contributions is underreported because of complex issues around data privacy, sovereignty, and economic impact analysis. Tribal nations are sovereign entities and are not bound by the same reporting requirements as other governmental bodies or private enterprises. This sovereignty, while a vital part of their identity and self-determination, makes it challenging for external entities to assess the full economic impact of tribal activities. Additionally, many tribes prioritize economic

investments that align with community well-being over profit maximization, further complicating traditional economic assessments.

Despite these reporting challenges, it is clear that the tribes play a fundamental role in the region’s economic and social development. Understanding their contributions requires a broader view—one that goes beyond GDP figures to include the preservation of culture, the strengthening of communities, and the sustainable use of natural resources.

Tribal nations significantly contribute to regional development, prioritizing community well-being alongside economic growth.



“Recognizing the diverse contributions of tribal nations is essential for a comprehensive understanding of regional economic and social development.”

WEAKNESSES

TRANSPORTATION & INFRASTRUCTURE

Public transit and overall infrastructure are inadequate to meet current and future demands. Insufficient connectivity across key areas is a major challenge. While the region has made some strides toward expanding its public transit system, such as the new Bus Rapid Transit (BRT), it remains underdeveloped compared to other major metro areas. This can severely limit mobility for lower-

income workers or those without reliable access to cars. Additionally, the region’s road infrastructure, particularly in the rural areas, needs investment to support economic growth. In recognition of this, the state legislature appropriates Rural Economic Action Plan (REAP) monies, which ACOG distributes to small communities for infrastructure and public works projects.

EDUCATION

Nationally, 35% of all adults over 25 have a bachelor’s degree. Regionally, the average is 28%. The urban areas, particularly Norman and Oklahoma City, have a higher rate, close to the national average, whereas the rural areas of the region tend to have less attainment – in heavily rural Logan County, for example, the educational attainment rate is 20%. This gap in educational attainment can affect the region’s ability to attract industries that rely on a highly skilled workforce. Additionally, the area is experiencing a teacher shortage, which impacts the public education system, as does the increasingly politicized climate around education policy at the state level.

Improving public transit and infrastructure is essential for fostering equitable access to opportunities for all residents.

HEALTHCARE

Central Oklahoma also faces challenges in healthcare access and outcomes, particularly in more rural parts of Logan and Canadian Counties. Despite improvements, the region still has healthcare deserts where access to primary and specialized care is limited. This can affect overall quality of life and make it harder to attract talent from outside the region.

REGIONAL COLLABORATION

The region has competing visions and inefficient mechanisms to implement them. Stakeholders point to siloed, non-collaborative environments and political divisions often exacerbated by a disconnect in values between elected officials and residents and the urban-rural divide.



OPPORTUNITIES

TOURISM

A research study by Tourism Economics revealed that in 2023, the Central Oklahoma region welcomed 24.1 million visitors, resulting in an annual economic impact of \$4.5 billion.

CASE STUDY: FIRST AMERICANS MUSEUM & OKANA RESORT

The First Americans Museum (FAM) opened in September 2021. The world-class, prestigious museum will now be complemented by a \$300+ million resort development named OKANA, opening Spring 2025. FAM is located in the newly established Horizons District, at the confluence of Interstates 35, 40, 235, and 44. FAM serves as a starting point to explore First American attractions throughout Oklahoma.

“Undoubtedly, an entertainment and lodging complex of this magnitude will add significantly to the exciting progress going on in Oklahoma City,” Chickasaw Nation Secretary of Commerce

Bill Lance said. **“Initially, the resort is projected to employ 400 people and the annualized economic impact year one is projected to be \$97 million. Additionally, estimates for the 10-year economic impact of this development are projected to exceed \$1 billion, with full-time employment expanding to approximately 700-800.** OKANA is expected to attract 400,000 visitors, more than 50% of which will be from out of state.

Horizons District, Oklahoma City

RECREATIONAL & SPORT TOURISM

The RIVERSPORT OKC National High Performance Center’s training facilities and equipment are among the best in the world. Named an official **U.S. Olympic & Paralympic Training Site** in 2009, RIVERSPORT offers one of only a few training sites across the nation to earn this prestigious designation. **Oklahoma City will participate in the 2028 Los Angeles Olympics, hosting all Canoe Slalom and Women’s Softball events.** (Note: The International Olympic Committee Executive Board has approved these venue assignments for Olympic sports, pending approval from the City of Los Angeles.)

The USA Softball Hall of Fame complex, now known as Devon Park, has an annual economic impact of \$50M, and 190,000 annual visitors. The park is the venue for the NCAA Women’s College World Series every spring, which alone generates \$25M into the Central Oklahoma economy annually.

Sports Tourism stimulates economic growth by increasing local spending and creating thousands of jobs.

RIVERSPORT Adventure Park
LA Olympic Plans 2028



University of Oklahoma Gaylord Family - Oklahoma Memorial Stadium

SOUTHEASTERN CONFERENCE (SEC)

The University of Oklahoma joined the SEC in 2024, and already the region has experienced positive ripple effects. The SEC generates over \$104.5 billion in economic impact across its 16 institutions, and Oklahoma will benefit as a member institution. Hotels,

restaurants, and local businesses in Norman have seen an uptick in length of hotel stays and increased spending in the community around game days.

OKC THUNDER - NBA

The OKC Thunder and the City of OKC are building a new arena that will be open for the 2029-2030 season. The arena is funded via a one-cent sales tax and MAPS 4 funds. An Economic Impact study by Applied Economics, found that the arena will support an estimated 3,280 jobs, \$299.7M in annual labor income and \$590M in annual economic output in Oklahoma City, including more than 2,280

indirect jobs at local business that benefit from the operations of the team, the arena and visitors. While some of these economic impacts are already taking place in the metro area due to the presence of Paycom Center, the new arena will allow for an increased level of third-party events and related impacts.

NBA Oklahoma City Thunder Basketball Arena



OKLAHOMA BIOTECH INNOVATION CLUSTER & THE INNOVATION DISTRICT

In 2019, the citizens of Oklahoma City approved a \$71 million investment in the burgeoning Innovation District as part of MAPS 4. This investment included funds to encourage equitable development for minority-owned small businesses, better connectivity in and around the district and the construction of an “Innovation Hall” to serve as a central place where activities to grow the region’s innovation economy can be facilitated.

Building upon this momentum, in 2022 the Oklahoma Biotech Innovation Cluster was awarded \$35 million in the EDA’s Build Back Better Regional Challenge to rapidly expand its biotechnology cluster, bolstering domestic resiliency within the biopharmaceutical supply chain and making the cluster more globally competitive.

The Innovation District currently encompasses 1.3 square miles just east of downtown Oklahoma City. It is home to organizations spanning Oklahoma’s diverse sectors – health, energy, aerospace, technology, research, academia, and more. The latest addition to the Innovation District is Convergence, the catalyst of Oklahoma City’s Innovation District that is projected to bring \$1.2 billion in annual economic impact. The mixed-use development, positioned as the heart of Oklahoma City’s Innovation District, is sited on 5.5 acres near NE 8th Street and I-235. The development includes: The Tower at Convergence, an upscale boutique hotel and restaurant, a 2-level, below-grade parking garage, Stiles Park and Oklahoma City’s Innovation Hall.

The pedestrian-friendly environment establishes connectivity between Oklahoma’s two largest universities, which is critical for the success of Oklahoma City’s Innovation District, which are adjacent to the Oklahoma Department of Commerce and State Chamber of Oklahoma. A key feature of the high-density project is the collaboration between the public and private community to foster a foundation of inclusivity, diversity, growth, and opportunity.

After 25 years of building the Oklahoma City bioscience industry, the region is at a critical inflection point for scalable and equitable growth. Since 2001, local employment in the industry has grown 25 percent, biomedical R&D activity has more than doubled, and anchor economic development institutions have onboarded new leadership specifically prioritizing inclusive and equitable growth.

EDA funding will build the Oklahoma Center for Development Therapeutics, a program designed to address the cluster’s rate-limiting challenge to commercialization (e.g., attracting leading scientists to the region, supporting drug development pipelines). Other funded efforts will include expansion of the region’s clinical trials center to include more disease types and patients served (with a specific focus on Tribal communities), an OKBioStart program to launch and grow biotech startups across Central Oklahoma, and a bioprocessing core facility and workforce program preparing the region for biomanufacturing at scale. The coalition capitalizes on a “once-in-a-generation opportunity” to build new biotech industry



Innovation District, Oklahoma City

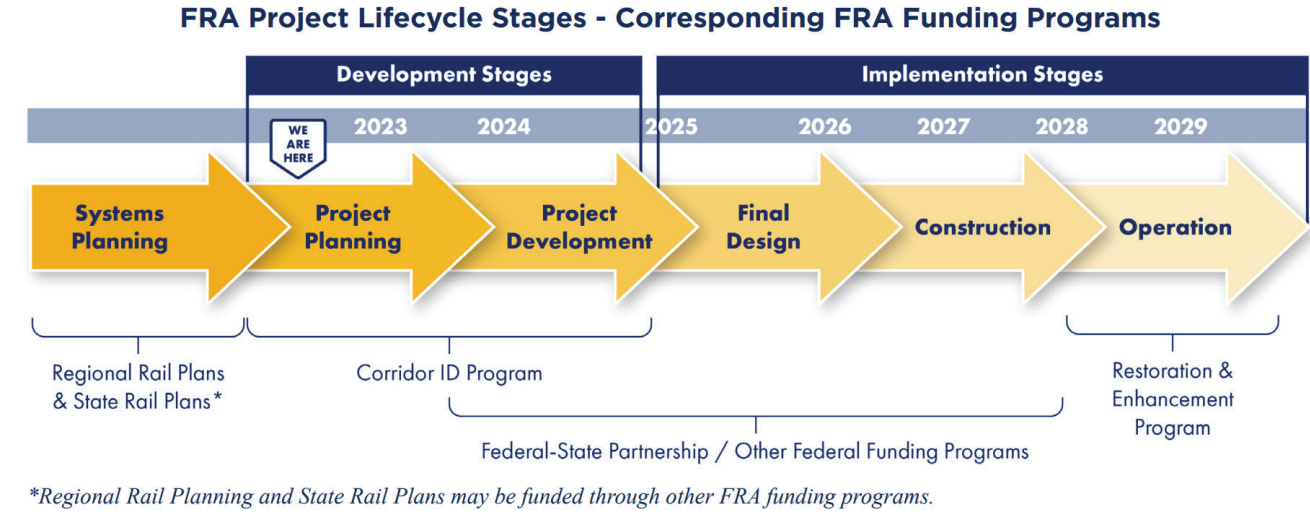
collaborations outside of just the East and West Coasts, bringing economic benefit to the center of the country.

A strategic roadmap report prepared by TEconomy Partners, LLC (August 2023) for the Greater Oklahoma City Chamber of Commerce identified remaining barriers to high-growth bioscience clusters in Oklahoma. Chief among these is the “valley of death,” the gap between research discoveries and new product development, which hinders the formation of venture-backed companies in the region.

Despite a strong foundation, the region needs more resources to translate these discoveries into marketable innovations. One partner working on these issues is **Oklahoma State University, an EDA-designated University Center**. By focusing on product and business development for companies operating at the intersection of human, animal, and environmental health, they are working to provide a unique and complementary platform for advancing technologies along the commercialization continuum.

REGIONAL CONNECTIVITY: PASSENGER RAIL


Last year (2023), the Federal Railroad Administration (FRA) selected the Amtrak Heartland Flyer to be part of their Corridor ID program. It awarded the Kansas Department of Transportation \$500,000 to study the expansion of the Heartland Flyer from Oklahoma City to Newton, Kansas. The route would include regional stops in Edmond and Guthrie, extending the line north of Oklahoma City, where it currently truncates. Completion of this line would be a boon to the region, connecting it with other rail lines that serve points north on the Amtrak line.



REGIONAL TRANSPORTATION AUTHORITY OF CENTRAL OKLAHOMA

In 2019, ACOG established the Regional Transportation Authority of Central Oklahoma (RTA). Currently, the RTA has three member communities: Edmond, Norman, and Oklahoma City. Four regional corridors have been identified in the Transit System Plan: North/South Corridor, East Corridor, West Corridor, and Airport Corridor. In 2023-24, the RTA completed an Alternatives Analysis study resulting in a Locally Preferred Alternative (LPA) for each of the corridors.

These alternatives include Bus Rapid Transit (BRT) and Commuter Rail. The RTA established detailed evaluation criteria to support their goals and objectives, as depicted. It is anticipated that the RTA will present a sales tax proposal to voters in the three member communities in 2025/2026 for their approval. **If approved, federal funding would be unlocked to match the region’s investment in the system.**




Connects with activity and employment centers



Serves areas of persistent poverty



Serves areas with capacity for future growth



Utilizes existing transportation infrastructure

ENERGY DIVERSIFICATION

The U.S. power grid is struggling to keep pace with growing energy demands driven by increased reliance on technology and the intensifying impacts of climate change, including more extreme weather events. Unlike many other countries, the U.S. operates three separate power grids, each further divided by region. This fragmentation means that when Central Oklahoma faces a severe weather event, such as the October 2020 ice storm, it must rely solely on its own region’s grid, making recovery a costly and potentially life-threatening challenge.

Power outages, whether planned or unexpected, also have a significant economic impact on businesses,

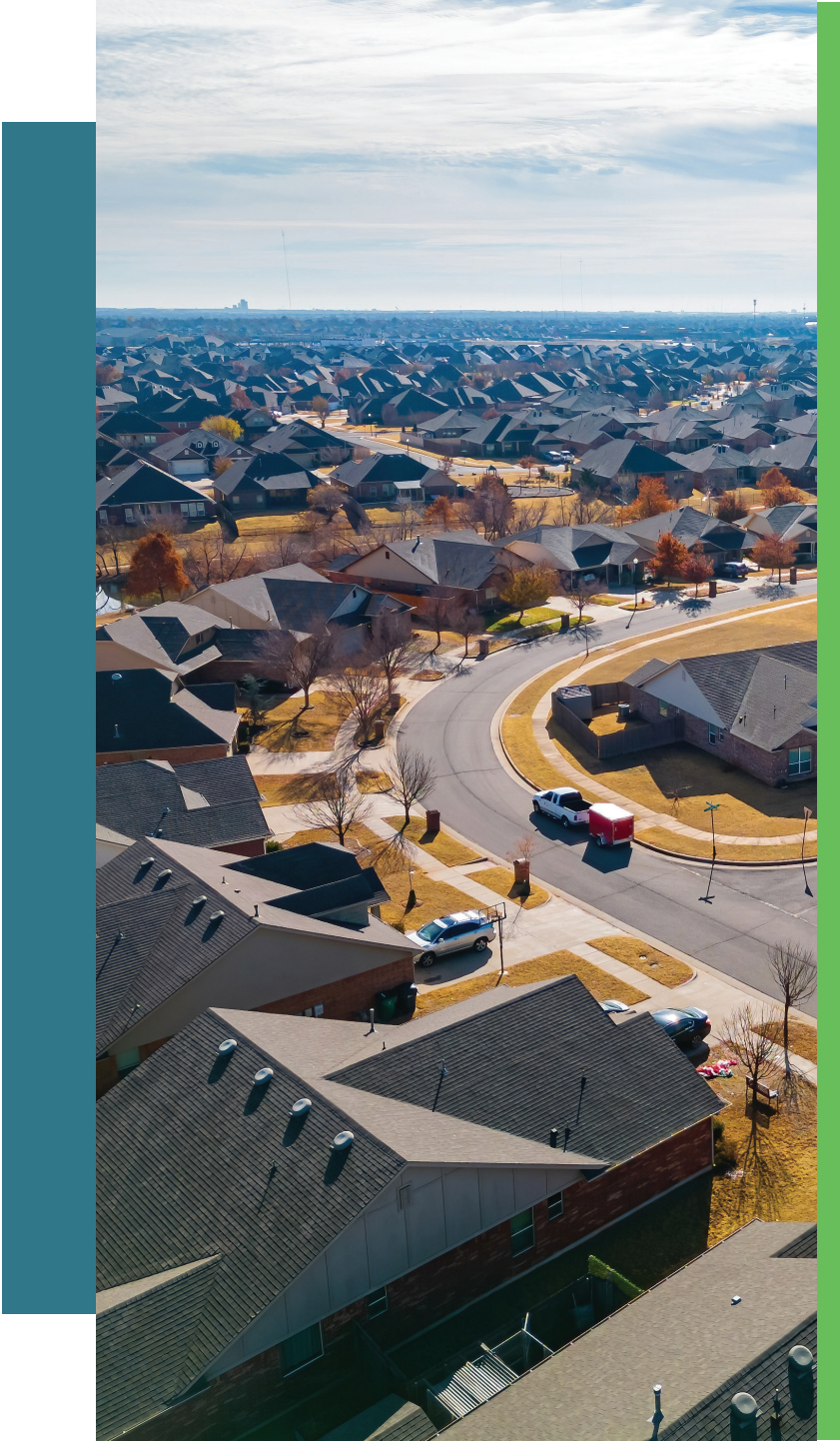
which can lose between \$300,000 and \$1 million for every hour without electricity. Residents and businesses still rely on the traditional power grid to meet their needs, but localized power generation offers an alternative solution that is both reliable and sustainable.

Fuel cells that run on hydrogen, natural gas, or a mix of both offer a transformative opportunity for Central Oklahoma’s economy. Unlike traditional natural gas power generation, non-combustion fuel cells don’t burn natural gas. Instead, they use it as a way to carry hydrogen. These fuel cells can take advantage of the current natural gas infrastructure, making it possible

to provide more efficient energy in a cost-effective and scalable way.

Fuel cells don’t require the construction of expensive new infrastructure or take years of permitting and regulatory approval, as transmission line projects do, which makes them an innovative and practical solution for the region’s energy needs. Additionally, by adopting localized power generation, the shipping and handling costs of transmitting electricity over long distances can be drastically reduced or even eliminated, making electricity more affordable and accessible for all consumers.

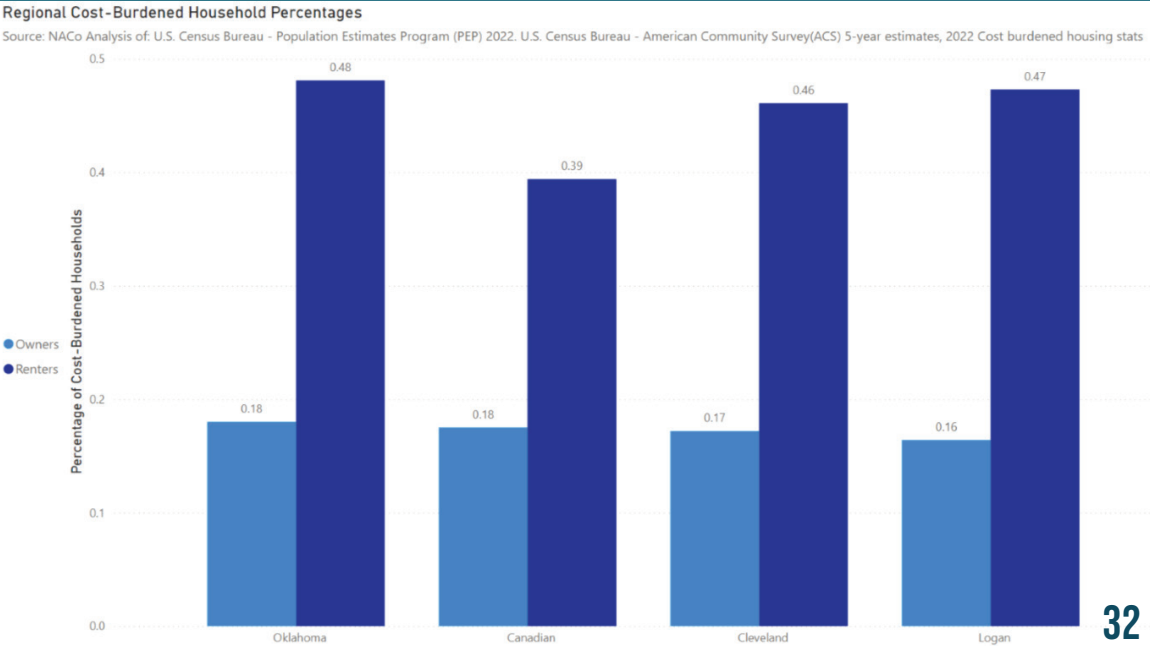
LEARN MORE ABOUT HYDROGEN ENERGY AT: [HTTPS://WWW.OKCOMMERCE.GOV/](https://www.okcommerce.gov/)



THREATS HOUSING CHALLENGES

Housing affordability, although still low in comparison to other regions nationally, is nevertheless becoming a significant issue, with many residents spending a large portion of their income on housing, limiting their financial flexibility. Cost-burdened housing is when a household spends more than 30% of its income on housing costs, such as rent and utilities.

As seen below, the regional average for cost-burdened households is a staggering 48% of renters and 17% of homeowners. Proactively addressing housing is key to maintaining the region’s attractiveness as a low cost-of-living destination. The region — and the state overall — is also experiencing a sharp rise in the cost of property insurance and ad valorem taxes, which threatens overall housing affordability for many, especially those with lower incomes.



HOME INSURANCE COSTS

Oklahoma has the highest rate of property insurance in the nation, according to a study by Quadrant Information Systems for Insurance.com, using 2024 data.

- **Logan County:** Homeowners paid an average of **\$3,736** last year for insurance, **53%** more than other counties with the same level of high risk. Insurance costs are **1.4%** of typical home values.
- **Oklahoma County:** Homeowners paid an average of **\$2,952** last year for insurance, 21% more than other counties with the same level of high risk. Insurance costs are 1.4% of typical home values.

- **Cleveland County:** Homeowners paid an average of **\$2,794** last year for insurance, 14% more than other counties with the same level of high risk. Insurance costs are 1.2% of typical home values.
- **Canadian County:** Homeowners paid an average of **\$2,935** last year for insurance, 20% more than other counties with the same level of high risk. Insurance costs are 1.1% of typical home values.

Nationwide the average homeowners insurance average is \$2,601 annually for \$300,000 in dwelling coverage and liability and a \$1,000 deductible.

Climate change and natural disasters are one part

of the reason for the sharp increases, according to Benjamin Keys and Philip Mulder, the authors of new research that tracks what Americans in different counties and ZIP codes paid for home insurance over the past decade. In general, they found that costs increased the most in the parts of the country with the greatest exposure to extreme weather, but there is another key factor. Ishita Sen, a professor at Harvard, has found that after insurance companies suffer big losses in states that are tightly regulated, they tend to raise rates in more loosely regulated states. That suggests that companies are using homeowners in some parts of the country to subsidize the cost of disasters elsewhere.



Western Oklahoma Interstate 40

INADEQUATE TRANSIT SOLUTIONS

Transit, housing, sprawl, and air pollution are all inextricably linked. As more housing stock is produced to meet demand, growth occurs further and further away from urban centers, into suburban and exurban areas. There are no true natural boundaries in the region (e.g. mountains or coastline) that limit growth, so growth tends to sprawl outward, where infrastructure capacity is limited, and public transit is unavailable. This is further exacerbated by unplanned growth as exemplified by the financing adage “drive until you qualify”.

This trend is exemplified by the growth in Canadian County, the westernmost county in the OKC metro, which grew the most during the pandemic by far, adding more than 11,000 residents on net from inside and outside the state.

ENVIRONMENTAL THREATS

The region’s economic growth is threatened by climate hazards, including extreme heat, drought, tornadoes and other severe weather events. Air pollution is a significant threat as the region’s population increases. See the RESILIENCE section for related information.

CASE STUDY: COST OF NONATTAINMENT STUDY (2022)

During the last five years as the Central Oklahoma region achieved local and national success in economic development and growth, it has crept closer to violation of the Environmental Protection Agency (EPA) Ozone Standard.

With the release of the Cost of Nonattainment (CNA) Study for the Oklahoma City Area, the Association of Central Oklahoma Governments (ACOG) reports that a violation of federal air quality standards and ensuing federal regulatory requirements could cost the OKC Metro Area as much as \$9.6 – \$15.2 billion over a 20 to 30-year period.

“We are one of the largest metropolitan areas still meeting EPA air quality standards,” Mark W. Sweeney, AICP, ACOG Executive Director said. “With this study, our goal has been to utilize our resources as a regional planning organization to be innovative, forward-thinking and to prepare the area for all possible scenarios.”

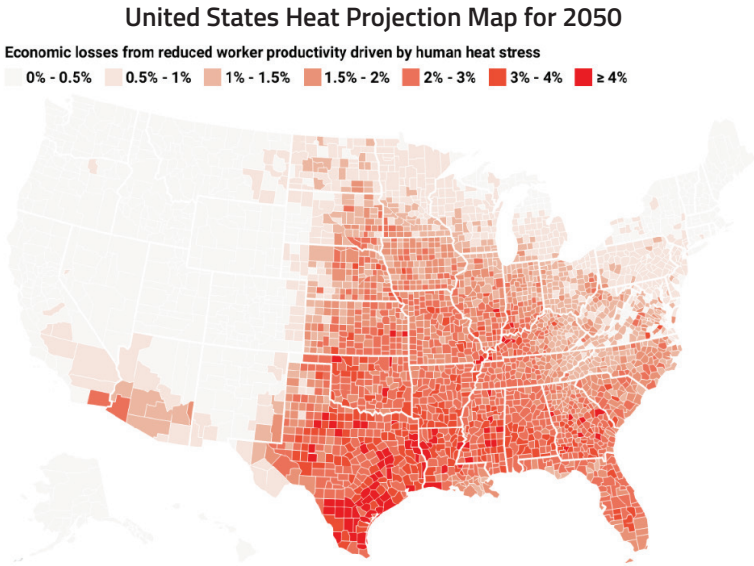
The \$9.5-\$15.2 billion in economic costs identified in this study reinforce the urgent need for the Oklahoma City Area to remain in attainment of the Ozone standard. The financial burdens to the transportation system are also identified – saddling businesses,

government agencies, and individuals with increased construction costs, delayed road projects, and new regulatory requirements.

“Clean air is essential to the quality of life for all Central Oklahomans, and the region’s air quality attainment status is an economic strength that supports prosperity, opportunity, and economic development advantages over other regions,” Sweeney said.

HEAT

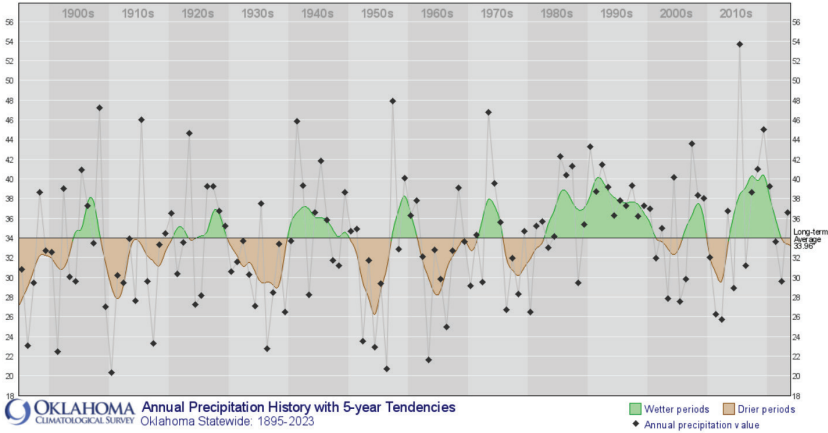
The economic costs of extreme heat are already huge. The current figure of \$100 billion in annual losses in the United States is purposefully conservative. It focuses solely on worker productivity and how heat chips away at it and doesn’t factor in issues like heat’s effects on tourism, infrastructure, healthcare costs, and energy costs. The losses will increase as climate change worsens—to approximately \$200 billion by 2030 and \$500 billion by 2050. Our region is at significant risk for extreme heat.



Modeled economic losses from reduced worker productivity due to human heat stress measured as a county’s historical or projected percent loss in gross value added (GVA), an economic-productivity metric.

DROUGHT

Drought in the region is cyclical. Even when the region isn’t experiencing a drought, regional planners should be preparing for the next drought. Robust regional growth puts additional strain on the water supply, and climate change exacerbates drought. The graph below shows the cyclical nature of wet and drought periods in Oklahoma. The black dots represent the annual precipitation for that particular year. The line represents the annual precipitation data smoothed over five years. This smoothed line shows the wet periods (shaded green) and the drought periods (shaded brown). The drought cycles appear to average about five to eight years in length.





RESILIENCE

RESILIENCE

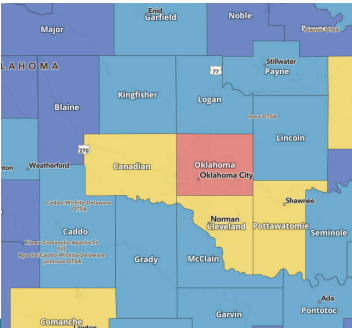
Resilience is the ability to predict, withstand and recover from economic disruptions. These may include:

- Natural and human-caused hazards (e.g., flooding, drought, tornado or pandemic).
- The closure of a large employer (e.g., a factory or power plant).
- The decline of an important industry or supply chain (e.g., manufacturing, natural resource extraction, tourism, agriculture or technology).
- Changes in the workforce (e.g., leaving the area or lack of skill specialization).

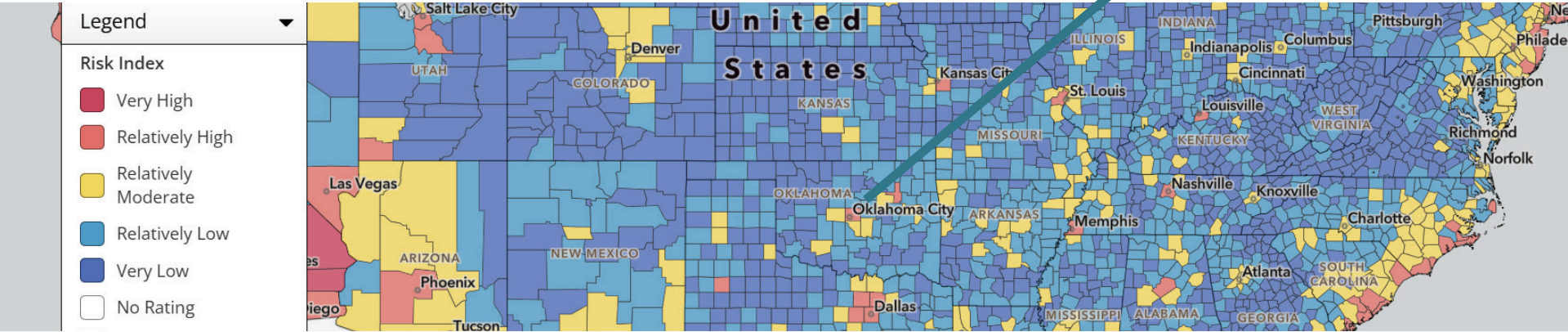
To build economic resilience, communities must understand their risk to economic disruptions. They must evaluate how economic assets may be affected. They can then develop a responsive capacity.

Multi-hazard resilience may address risks from wildfires, drought, tornadoes, extreme heat, flooding, earthquakes, winter storms, and more. Resilience should include actions that address both immediate, pressing needs as well as decisions that protect long-term investments. As communities recover from recent disasters and face future risks, resilience must focus not only on surviving disasters but on revitalizing communities and building up and diversifying regional economies to resist and adapt to external shocks.

Access the U.S. Department of Housing and Urban Development’s Community Resilient Toolkit at: <https://files.hudexchange.info/resources/documents/HUD-Community-Resilient-Toolkit.pdf>



National Risk Index for Community Resilience, FEMA.

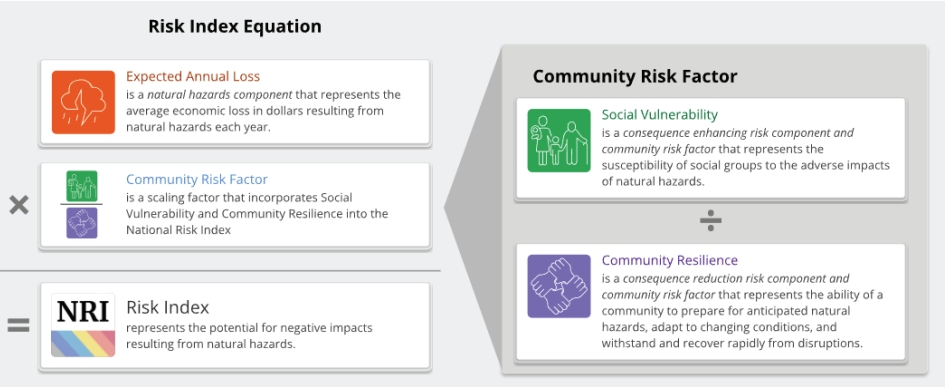


In response to the COVID-19 pandemic, ACOG created the Community Economic Resiliency Initiative (CERI) Program, to offer municipal governments the opportunity to develop planning demonstration site projects that would model strategic community and economic investment.

For more info, please visit <https://www.acogok.org/ceri/>

Natural hazards are defined as environmental phenomena that have the potential to impact societies and the human environment. Natural hazards and natural disasters are related but are not the same. A natural hazard is the threat of an event that will likely have a negative impact. A natural disaster is the negative impact following an actual occurrence of natural hazard if it significantly harms a community. The National Risk Index is designed to help communities understand their relative natural hazard risk and the impacts they could expect during or after a disaster.

The FEMA National Risk Index calculates risk with this formula: Expected Annual Loss x Social Vulnerability ÷ Community Resilience = Risk. **Oklahoma County is at Relatively High Risk, Cleveland and Canadian Counties are at Relatively Moderate Risk, and Logan County is at Relatively Low Risk.** (Source: FEMA.gov). Exploring the data underlying these risk assessments is a good first step for communities as they approach Resilience Planning.



Source: FEMA.gov

CREATING REGIONAL RESILIENCE BUILDING A RESILIENCE PLAN

Resilience Plans provide a blueprint for building adaptive, sustainable systems that protect not just the physical environment but also the social and economic fabric of the community. By

fostering resilience, communities can effectively mitigate risks and ensure long-term sustainability. The following is a suggested outline of the necessary steps:

- 1

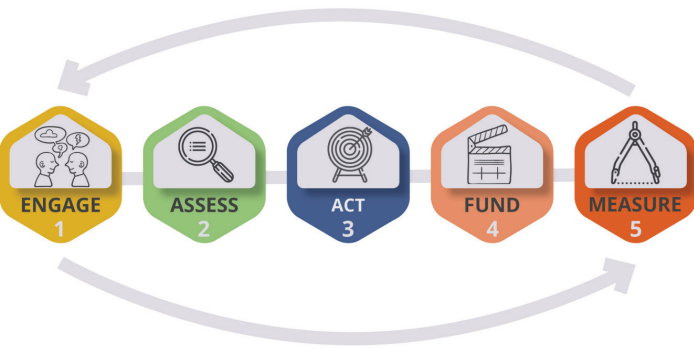
Engagement for Resilience | Build Trust in Partnerships and Relationships
- 2

Conduct Vulnerability Assessment | Lay the Groundwork
- 3

Identify and Prioritize Strategies | Summarize Risk and Vulnerability
- 4

Fund for Action | Make the Business Case for Resilience
- 5

Evaluate Results and Refine Methods | Determine What to Measure and Why



The five steps ideally work in a continuous loop that will improve planning over time. For instance, partners might start small for the first go round and look at a single category, such as wastewater infrastructure. Partners can then repeat and scale up the process to include other categories and more partners. For more information, see the [Regional Resilience Toolkit](#).

Available funding from the Federal Emergency Management Agency (FEMA) for Regional and Community Resilience Plans includes the following grants:

The Building Resilient Infrastructure and Communities (BRIC) Grant supports states, local communities, tribes and territories as they undertake hazard mitigation projects, reducing the risks they face from disasters and natural hazards.

The BRIC Direct Technical Assistance (BRIC DTA) Grant provides tailored support to communities and tribal nations that may not have the resources to begin climate resilience planning and project solution design on their own.

Flood Mitigation Assistance funds are used for projects that reduce or eliminate the risk of repetitive flood damage to buildings insured by the National Flood Insurance Program.

The Hazard Mitigation Grant Program provides funding to state, local, tribal and territorial governments so they can develop hazard mitigation plans and rebuild in a way that reduces, or mitigates, future disaster losses in their communities. This grant funding is available after a presidentially declared disaster.

The Hazard Mitigation Grant Program has Post Fire assistance available to help communities implement hazard mitigation measures after wildfire disasters.

The Pre-Disaster Mitigation Grant Program makes federal funds available to state, local, tribal, and territorial governments to plan for and implement sustainable cost-effective measures designed to reduce the risk to individuals and property from future natural hazards, while also reducing reliance on federal funding from future disasters.



EF4 Tornado in Central Oklahoma

THE NEED FOR A RESILIENT BUILT ENVIRONMENT

BUILDING CODES

Building codes are a cornerstone of community resilience, playing a vital role in ensuring that structures are designed, built, and maintained to withstand various hazards, thereby protecting lives, property, and the functionality of communities during and after disruptive events. FEMA recommends the International Building Code (IBC) and International Residential Code (IRC) as the most hazard-resistant building codes. FEMA

considers codes from 2018 or later to be hazard-resistant if they don't have amendments that weaken hazard-resistant provisions.

However, tornado hazards have not previously been addressed in the design of conventional buildings, even though tornadoes and tornadic storms cause more fatalities and more catastrophe-insured losses than hurricanes and earthquakes combined.

In the newly published IBC 2024, design provisions for tornado loads are now required for the first time for Risk Category III and IV buildings in "defined areas", including the entire state of Oklahoma, which had an annual average of 65 tornadoes from 1993-2022 (National Weather Service Storm Prediction Center 2022). This change in the IBC is of critical relevance to the Central Oklahoma region.

The latest edition of the Oklahoma state building code, based on the 2018 IBC and 2018 IRC, is mandatory statewide, and went into effect in 2021 (IBC) and 2022 (IRC). Though rated hazard-resistant, this version IBC does not adequately address the very serious threat posed by tornadoes to the following high-risk buildings:

Risk Category IV: These are buildings that are essential in that their continuous use is needed, particularly in response to disasters. Hospitals, fire stations, police stations and emergency vehicle garages must remain operational during and after major disaster type events. The phrase "designated as essential facilities" refers to designation by the building official that certain facilities are required for emergency response or disaster recovery. This concept provides jurisdictions with the latitude to identify specific facilities that should be considered essential in responding to various types of emergencies.

Risk Category III: These buildings include those occupancies that have relatively large numbers of occupants because of the overall size of the building. They also include uses that pose an elevated life-safety hazard to the occupants such as public assembly, schools or colleges. In addition, Risk Category III includes uses where the occupants' ability to respond to an emergency is restricted, such as jails, or nursing homes which house patients who require skilled nursing care.



ACOG strongly supports the adoption of the 2024 IBC to address the significant risk posed by tornadoes and tornadic winds to the region and the state.



OU Children's Hospital, Oklahoma City, Oklahoma



STRATEGIC DIRECTION/ACTION PLAN

STRATEGIC DIRECTION/ ACTION PLAN

GOAL 1: FOCUS ON COST-OF-LIVING AFFORDABILITY AND QUALITY OF LIFE TO SUPPORT CONTINUED REGIONAL GROWTH. TIMELINE: 1-3 YEARS.

ACTIONS & STRATEGIES

1. Encourage energy-efficient, weather and climate-resistant housing, especially for lower-income, underserved households who are more vulnerable. This action has multiple benefits. Energy-efficient structures built to withstand weather and climate challenges help keep property insurance costs down over time and build economic resilience in the case of natural disasters. They use less energy, which lowers housing costs and helps the environment.
 - a. Promote existing free energy-efficiency programs,
 - b. Collaborate with the public and nonprofit sectors to equitably expand access to housing rehabilitation services,
2. Collaborate with communities to promote updated codes,
 - a. Support regional adoption of the 2024 IBC to increase resilience from tornados and high winds,
3. Proactively work with stakeholders, developers, and local governments to increase housing supply and lower housing costs.

CASE STUDY: THE STRENGTHEN OKLAHOMA HOMES PROGRAM

One encouraging piece of legislation, the Strengthen Oklahoma Home (SOH) Act, goes into effect in late 2024. SOH provides grants for residential wind and hail mitigation on new and existing owner-occupied, primary residence single-family homes. Funding for this program comes from the insurance industry in Oklahoma and is not funded from the state’s general budget.

The mitigation standard adopted by the Strengthen Oklahoma Homes program is known as FORTIFIED Home™. It is a voluntary beyond-code construction and re-roofing program. To receive this grant, residents must obtain an IBHS FORTIFIED Home – Roof™ – High Wind designation with the Hail Supplement. After these mitigation measures are complete, residents can qualify for property insurance discounts of up to 42%.

CASE STUDY: ADDRESSING HOUSING EQUITY & ACCESS

The Oklahoma Community Land Consortium (OKCLC) is a first for Oklahoma. Created in 2024, it is a non-profit organization operating as a community land trust to create affordable housing solutions. The OKCLC uses a shared equity homeownership model to make buying a home an affordable solution for those with low-to-moderate incomes, who might otherwise be excluded from the housing market.

Currently there are about 225 community land trusts in the United States. The model was pioneered by black farmers in the South and spread across the country as communities realized its potential for preserving access to land over many generations.

LEARN MORE AT: [HTTPS://WWW.PLANNING.ORG/PUBLICATIONS/DOCUMENT/9289884/](https://www.planning.org/publications/document/9289884/)



Source: Housing Supply Accelerator Playbook, 2024

LOCALLY DRIVEN SOLUTIONS AROUND THE COUNTRY

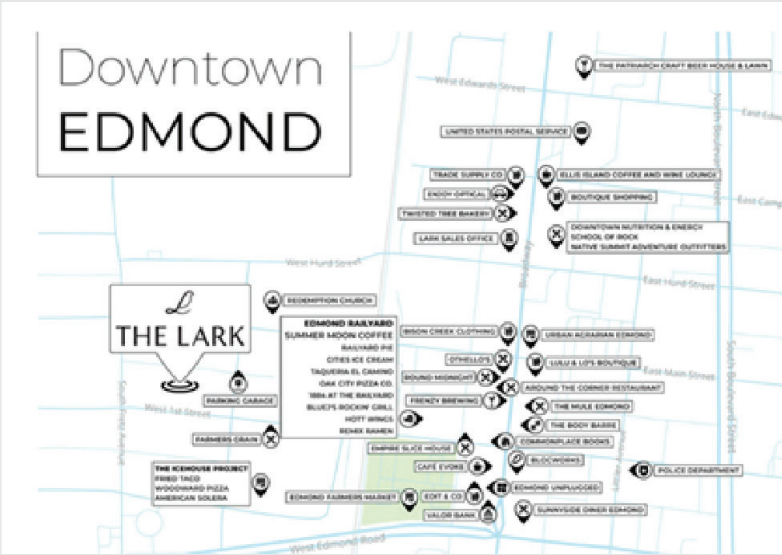
1. Promoting transit-oriented development
2. Creating banks and community land trusts
3. Permitting missing middle housing
4. Supporting rehab and repair tools
5. Reducing parking minimums
6. Allowing accessory dwelling units

ALSO: Changing building codes, shortening permitting times, and providing pre-development capital.



“The American Planning Association’s Housing Supply Accelerator Playbook is for local elected officials and community planners working to boost diverse, attainable, and equitable housing supply in communities nationwide.”

CASE STUDY: EDMOND WALKABLE NEIGHBORHOOD TIF PROJECT



The Lark brings 42 small (<1200 sf) single family, urban cottages built in 1, 2 and 2 ½ bedroom configurations. It is an urban infill project developed for people and walkability, not cars. Arranged in a “Pocket Neighborhood” configuration where each cottage faces a common green space, it encourages neighbors to build healthy relationships through shared interactions. There are bike and grocery pull cart sharing programs, a community herb garden and a fully stocked shed with tools residents are encouraged to share.

It promotes walkability, not only within the neighborhood, but also within downtown Edmond. This innovative project, with a permitted value of \$17M, received \$2 million from Edmond’s Capital Improvement Plan sales taxes to upgrade water, sewage and storm water drainage systems, and area streets and alleys. Increased property tax revenues generated by the project’s 42 homes during the life of the Tax Increment Financing (TIF) will be used to reimburse the city for its upfront costs.

4. Continue municipal placemaking efforts that enhance quality of life through the ACOG CERl (Community Economic Resiliency Initiative) Program.

a. The CERl Program, now in its third year, uses EDA Planning Grant funds for this strategic project planning initiative, which received the 2022 Aliceann Wohlbruck Impact Award from the National Association of Development Organizations (NADO).
5. Address the rising cost of Property Insurance.

a. Support reevaluation of the “file-and-use” system for regulating property insurance rates. Support a policy change to becoming a “prior approval” state, meaning that the Insurance Commissioner must approve the rates before they can take effect.
- b. Support a policy change to hold Public Hearings for ALL rate increases, not just select cases, as is the current practice.

c. Explore limiting how much profit an insurer can earn from premiums to prevent excessive rates with strict profit margin caps.

d. Support automatic roll-back mechanisms in place to address higher rates that are later determined to be unjustified.
- THE INSURANCE CRISIS CONTINUES TO WEIGH ON HOMEOWNERS: <https://www.jchs.harvard.edu/blog/insurance-crisis-continues-weigh-homeowners>
- # CASE STUDY: INSURE LOUISIANA INCENTIVE PROGRAM
- The Insure Louisiana Incentive Program offers financial incentives to support economic development and stability in Louisiana by attracting new insurers, encouraging existing ones to keep writing policies and reduce the volume of business written by the state’s insurer of last resort, and increasing competitive pressure on insurance rates. The Commissioner of Insurance may grant matching capital funds to qualified property insurers through public-private partnerships executed through cooperative endeavor agreements. The program, approved by a significant bipartisan majority, initially allocated \$45M in funding. It is now in its second round of insurer applications, having successfully approved eight companies.
- # STATE INSURANCE PROGRAMS
- When private insurance becomes unprofitable and unattainable, many states have government-backed “last resort” insurance options that will insure homeowners unable to find coverage on the traditional market. Fair Access to Insurance Requirements (FAIR) Plans are state-managed programs funded by private insurance companies. Instead of a single insurer providing coverage, these companies collaborate as a consortium to share the responsibility of insuring properties under the FAIR Plan. This approach distributes risk among multiple
- insurers, reducing the burden on any one company. When a claim is filed, all participating insurers contribute to covering the loss proportionally. California, Florida, Hawaii, and North Carolina are among those who have state-run FAIR plans. Other states may have plans operated by private insurance companies. As the insurance market tightens, these state-run plans will likely take on a greater share of home insurance coverage in their states.
- # EVALUATION FRAMEWORK
- OUTCOMES:** Lower property insurance cost, more energy-efficient and resilient housing, updated local zoning and building codes, expanded inventory of diverse, transit-oriented housing, additional innovative financing mechanisms, and increased placemaking initiatives that contribute to overall quality-of-life.
- METRICS:** Lower annual property insurance rates, increase in the number of residents participating in energy efficiency programs, increased housing supply, increased diversity of housing types, increase in the number of ADUs, increase in pre-development initiatives, drop in number of permitting days, miles of sidewalks, increase in transit-oriented projects.
- KEY PARTNERS:** ACOG member governments and other elected local officials, USDA, nonprofit housing agencies, state legislators, residential developers and home builders, Oklahoma Insurance Department (OID), Oklahoma Homebuilders Association, Urban Land Institute (ULI), OU Institute for Quality Communities (IQC), and city/county/regional planners.
- 45
- 46

GOAL 2: STRENGTHEN REGIONAL WORKFORCE DEVELOPMENT.
TIMELINE 1-3 YEARS.

ACTIONS & STRATEGIES

- Encourage collaboration and coordination of resources, designating one central information clearinghouse for regional workforce development. There are many public and nonprofit stakeholders engaged in workforce development, but for both employers and future employees, navigating the system is difficult, and there is a duplication of resources and efforts by multiple agencies. These include the following:
 - [Central Oklahoma Workforce Innovation Board \(COWIB\)](#)
 - [UpskillOK](#)
 - [Oklahoma Department of Career and Technology Education](#)
 - Oklahoma Workforce Commission
 - [Oklahoma Works](#)
 - [Oklahoma Works Together](#)
 - [A Better Life OKC](#)
 - [Oklahoma Commerce Workforce Development](#)
 - [OKJobMatch](#)
 - [Urban League Workforce and Career Development](#)
 - [Online Consortium of Oklahoma](#)
 - [ShowWhatYouKnowOK](#)
 - [Onward OKC](#)
 - [Goodwill Industries](#)

CASE STUDY:
NONPROFIT & PUBLIC
SECTOR PARTNERSHIP
FOR EQUITABLE
WORKFORCE
DEVELOPMENT

In spring 2023, the Oklahoma City Community Foundation (OCCF) launched the Workforce Development Scholarships, aimed at helping to fill Oklahoma’s most significant employment gaps and accelerating the region’s goals for workforce development.

Collaborating with eight organizations around the metro, OCCF awarded a total of \$210,000 in grants to provide training opportunities to under- and unemployed individuals. One inaugural grantee was The InTune Mother Society (TIMS).

In 2020, TIMS partnered with the U.S. Department of Labor to launch its Pathways Program – a year-long, state-recognized certification program devoted to perinatal wellness education. Through this, they are building a pipeline of trained doulas, wellness coaches and community health workers with a focus on family planning to address gaps in perinatal health and wellness care with their program that targets the underserved populations.



- Support the development of industry and employer-driven, alternative workforce training and certifications (See BioTC Case Study).
- Focus on equitable workforce development initiatives that reach underserved and disenfranchised populations.
- Seek a diverse pool of funders that includes the private, nonprofit, and public sectors.

EVALUATION FRAMEWORK

OUTCOMES: A coordinated, collaborative workforce development system that is industry and employer-driven, includes partners from the public, private, and nonprofit sectors, embraces alternative pathways and certifications, and offers wrap-around services to support vulnerable populations.

METRICS: Increase in employment, increase in wages, number of partnerships, increase in program participation and enrollment, increased number of new initiatives, increased reach to underserved populations.

KEY PARTNERS: State and local public sector workforce organizations, ACOG Members’ Economic Development staff, the Oklahoma City Community Foundation, and other nonprofits.

Urban League career counselor Sharryc Smith works with client, Kyla Wade. www.occf.org

GOAL 3: THROUGH REGIONAL COLLABORATION, SOLIDIFY ECONOMIC GAINS WHILE
ADVANCING EQUITABLE EFFORTS TO DIVERSIFY THE ECONOMY AND ENHANCE
REGIONAL COMPETITIVENESS IN BOTH URBAN AND RURAL AREAS. TIMELINE 3-5 YEARS.

ACTIONS & STRATEGIES

- 1. Partner with Oklahoma State University, the region’s EDA University Center, to provide technology transfer and commercialization resources.
- 2. Capitalize on the EDA investment in the Oklahoma Biotech Innovation Cluster and the Innovation District as transformative catalysts for regional growth.
- 3. Continue building on the region’s successes in other key industries: Aviation and Aerospace, Energy, Logistics, Energy, and Tourism.
- 4. Foster entrepreneurship and equitable access to capital through alternative financing vehicles such as Revolving Loan Funds and business support programs.
- 5. Support and advocate for rural development and funding, especially infrastructure, utilizing Rural Economic Action Plan grant funds, USDA funds, EDA funds, and other resources.



In 2023, the Innovation Foundation at Oklahoma State University (OSU) received a \$650,000 five-year EDA University Center grant. This funding is actively helping innovators and companies in fields like energy, aerospace, agriculture, and One Health research access commercial grants, including the following: Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) grants, state-level Center for the Advancement of Science and Technology (OCAST) grants, and other commercial funding opportunities.



“The establishment of numerous innovation hubs in Central Oklahoma has significantly bolstered the region’s diversification efforts, fostering entrepreneurship and attracting tech startups that complement its traditional industries.”

“The Innovation Hub advances innovation and entrepreneurship across Oklahoma and launches new ventures through programming, supporting prototyping, events and coaching. The I-Hub includes a fabrication lab and OK Catalyst.”

- Tom Love Innovation Hub

CASE STUDY: NORTHEAST OKC RENAISSANCE (NEOKCR) REVOLVING LOAN FUND

The NEOKCR Revolving Loan Fund seeks to directly impact the economic development of historically underserved Northeast Oklahoma City. The RLF is working to make capital more equitable and accessible to Black and Indigenous People of Color (BIPOC) and has recently financed a land acquisition for a 20-unit mixed income housing development in Northeast Oklahoma City.



EVALUATION FRAMEWORK

SMALL BUSINESS RESOURCES: [HTTPS://WWW.GREATEROKLAHOMACITY.COM/SUBDOINGBUSINESS/SMALL-BUSINESS/](https://www.greateroklahomacity.com/subdoingbusiness/small-business/)

OUTCOMES: Strong and diverse business ecosystem that provides resources for new and existing businesses, drives innovation, and collaborates for economic success.

METRICS: Wage growth by sector, business startups, business tenure/retention, number of BIPOC and woman-owned businesses, amount of grant dollars invested across sectors, rural population growth, rural business growth.

KEY PARTNERS: USDA, NEOKCR, OSU/Cowboy Enterprises, Innovation District, state and local legislators, local economic development planners, and rural community leaders.

CONCLUSION

The 2024 Comprehensive Economic Development Strategy (CEDS) for the Capitol Area Economic Development District (CAPEDD) of Oklahoma represents a unified vision and actionable roadmap for advancing the economic, social, and environmental well-being of Central Oklahoma. Guided by collaboration, innovation, and equity, this strategy seeks to leverage the region’s dynamic economy, cultural richness, and strategic location while addressing critical challenges such as infrastructure gaps, housing affordability, and workforce development.

By building on identified strengths such as diverse industries, transformative public investments, and a moderate cost-of-living, the CEDS sets a path to unlock the potential of opportunities in tourism, workforce development, and the innovation economy. Strategic goals outlined in this plan—enhancing quality of life, fostering economic diversification, and bridging workforce gaps—are designed to propel

Central Oklahoma toward inclusive and sustainable growth. Utilizing the 2024 CEDS as a fundamental component of EDA and other grant applications will strategically enhance the successful funding of economic development projects for our region.

The success of this strategy depends on the active collaboration of stakeholders across the public, private, and nonprofit sectors. It invites regional leaders, businesses, and communities to embrace this vision and contribute to shaping a region where prosperity is equitably shared, challenges are met with resilience, and opportunities are accessible to all.

As we move forward, ACOG remains committed to evaluating progress, adapting to changing conditions, and maintaining open channels of communication with stakeholders. Together, we can ensure that Central Oklahoma not only meets its economic potential but also becomes a beacon of innovation, equity, and opportunity for future generations.

APPENDIX I

RESOURCES

- [National Economic Resilience Data Explorer \(NERDE\) – Argonne National Laboratory](#)
- [Economic Development Capacity Index](#)
- [American Community Survey – U.S. Census Bureau](#)
- [IndexMundi](#)
- [BroadbandNow](#)
- [Oklahoma Broadband Office](#)
- [Tinker Air Force Base](#)
- [Greater OKC Chamber](#)
- [Greater Oklahoma City – Economic Development](#)
- [U.S. Economic Development Administration](#)
- [BioTC Oklahoma](#)
- [The OKC Innovation District](#)
- [Oklahoma Department of Career and Vocational Technology](#)
- [Oklahoma Regents for Higher Education](#)
- [Central Oklahoma Workforce Innovation Board](#)
- [The Wall Street Journal](#)
- [Moody’s Analytics](#)
- [Oklahoma Native Impact Study](#)
- [Oklahoma State Chamber Research Foundation](#)

- [Best Places](#)
- [City of Oklahoma City](#)
- [City of Edmond](#)
- [City of Guthrie](#)
- [First Americans Museum](#)
- [OKANA](#)
- [Indian Health Service](#)
- [Oklahoma City Indian Clinic](#)
- [Partner Tulsa](#)
- [RIVERSPORT OKC](#)
- [Applied Economics](#)
- [The University of Oklahoma](#)
- [The Innovation Foundation at Oklahoma State University](#)
- [Oklahoma Department of Transportation](#)
- [Kansas Department of Transportation](#)
- [U.S. Department of Energy](#)
- [U.S. Department of Agriculture](#)
- [National Bureau of Economic Research](#)
- [CoreLogic](#)

- [Zillow](#)
- [Harvard Business School](#)
- [Association of Central Oklahoma Governments](#)
- [FEMA](#)
- [Center for Climate and Energy Solutions](#)
- [Oklahoma Insurance Department](#)
- [State of Louisiana](#)
- [Housing Supply Accelerator Playbook](#)
- [Oklahoma Community Land Consortium](#)
- [Comprehensive Economic Development Strategy and Hazard Mitigation Plan Alignment Guide, 2022](#)
- [Regional Resilience Toolkit, EPA, 2019](#)
- [FRED, St. Louis Federal Reserve](#)

APPENDIX II

CEDS ADVISORY COMMITTEE

- Rod Cleveland, Cleveland County Commissioner
- Richard Clements, Greater OKC Partnership
- DeAndre Martin, OKC Innovation District
- Phil Freeman, Mayor of Noble
- Todd Stone, City Council, OKC, Ward 4
- Brendon Summerville, City Planner
- Dawn Shelton, Town of Luther
- Roger Godwin, Mayor, City of Warr Acres
- Willard Linzy, Freedmen Association
- Tawny Shelby, City of Choctaw
- Michael Glessner, City of Noble
- John Nickel, Oklahoma State University
- Jim Eldridge, OG&E
- Aundrea Coye, USDA Rural Development
- Nick Camper, Oklahoma Broadband Office
- Jess Schwager, Oklahoma City Community Foundation
- Cailin Wright, Tobacco Settlement Endowment Trust
- Sidney Suttles, Tobacco Settlement Endowment Trust
- Travis Roach, Ph.D., University of Central Oklahoma
- Susan Bergen, Bergen Enterprises
- Pam Battle, Bergen Enterprises
- Angela Monson, Oklahoma Policy Institute
- Kathy Cullen, OKC Innovation District

- Shiloh Kantz, Oklahoma Policy Institute
- Terry Craghead, Fertile Ground Cooperative
- Calvin Slocum, Northeast OKC Renaissance Inc.
- Christina Beatty, Freedom Center
- J.D. Baker, Northeast OKC Renaissance Inc.
- Maki Dolan, Gene Rainbolt Graduate School of Business, University of Oklahoma

SPECIAL THANKS TO:

- E. Peter Hoffman, Jr., Mayor of Nichols Hills

ACOG STAFF

- Mark W. Sweeney, AICP, Executive Director
- John Sharp, Deputy Director
- Rachel Meinke, Public Information Director
- Sharon Astrin, Manager, Community & Economic Development
- Eric Pollard, Manager, Clean Cities & Air Quality
- Becky Goebel, Digital Media Specialist I
- Maria DeLoera, Planner I, Community & Economic Development

APPENDIX III

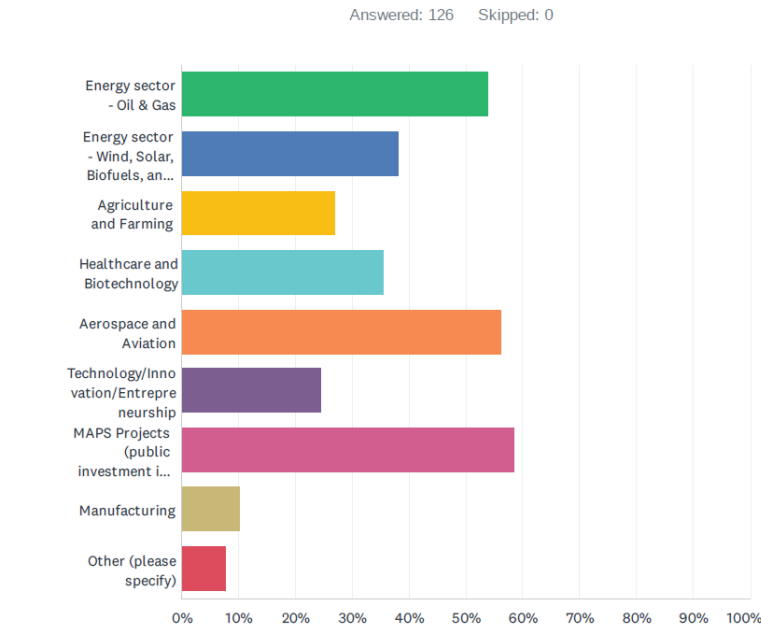
STAKEHOLDER ENGAGEMENT

In addition to the year-long CEDS Advisory Committee meetings and workshops, CAPEDD conducted an eight-question survey via Survey Monkey, to ensure that there was broad public input to the CEDS. The survey was heavily promoted with paid social media, posters with QR codes in state buildings, libraries, and other public places, and targeted email blasts to stakeholders.

One hundred and twenty-six people completed the survey. The results are summarized below.

CEDS Survey Results

Q1 What do you believe are Central Oklahoma's greatest economic strength(s)? Select all that apply.



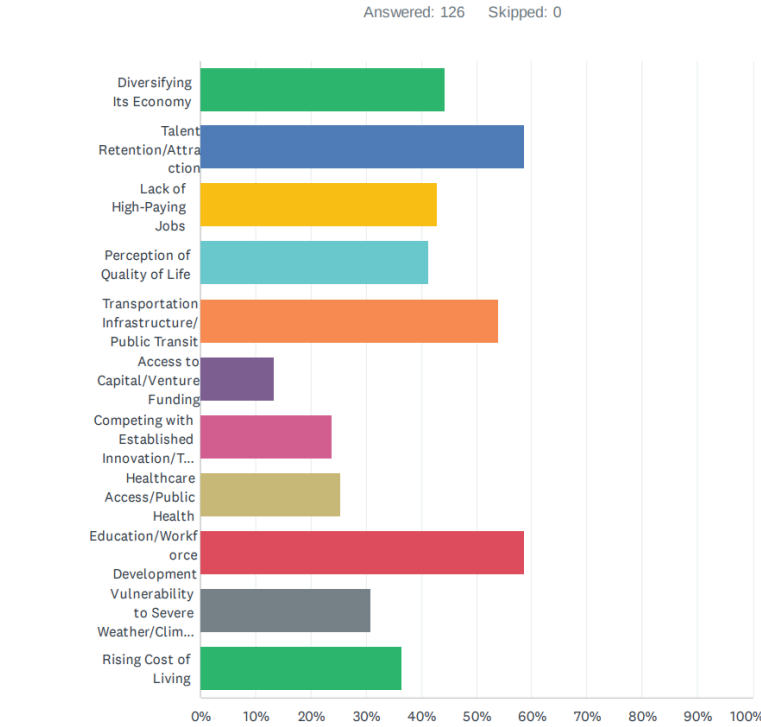
CEDS: A BLUEPRINT
A blueprint to grow, strengthen and diversify the economy of Central Oklahoma

CEDS REPORT
APPENDICES

ANSWER CHOICES	RESPONSES	
Energy sector - Oil & Gas	53.97%	68
Energy sector - Wind, Solar, Biofuels, and other developing Energy technologies	38.10%	48
Agriculture and Farming	26.98%	34
Healthcare and Biotechnology	35.71%	45
Aerospace and Aviation	56.35%	71
Technology/Innovation/Entrepreneurship	24.60%	31
MAPS Projects (public investment in quality of life)	58.73%	74
Manufacturing	10.32%	13
Other (please specify)	7.94%	10
Total Respondents: 126		

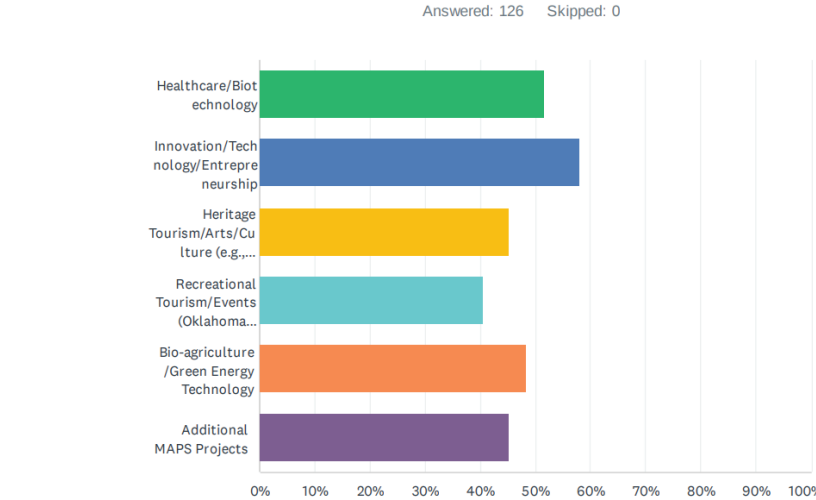
[LINK TO ALL QUESTION 1 ANSWERS](#)

Q2 What are Central Oklahoma's greatest economic challenge(s)? Select all that apply.



ANSWER CHOICES	RESPONSES	
Diversifying Its Economy	44.44%	56
Talent Retention/Attraction	58.73%	74
Lack of High-Paying Jobs	42.86%	54
Perception of Quality of Life	41.27%	52
Transportation Infrastructure/Public Transit	53.97%	68
Access to Capital/Venture Funding	13.49%	17
Competing with Established Innovation/Tech Hubs	23.81%	30
Healthcare Access/Public Health	25.40%	32
Education/Workforce Development	58.73%	74
Vulnerability to Severe Weather/Climate Challenges	30.95%	39
Rising Cost of Living	36.51%	46
Total Respondents: 126		

Q3 What new economic opportunities should the Central Oklahoma region prioritize for future economic growth? Select all that apply.



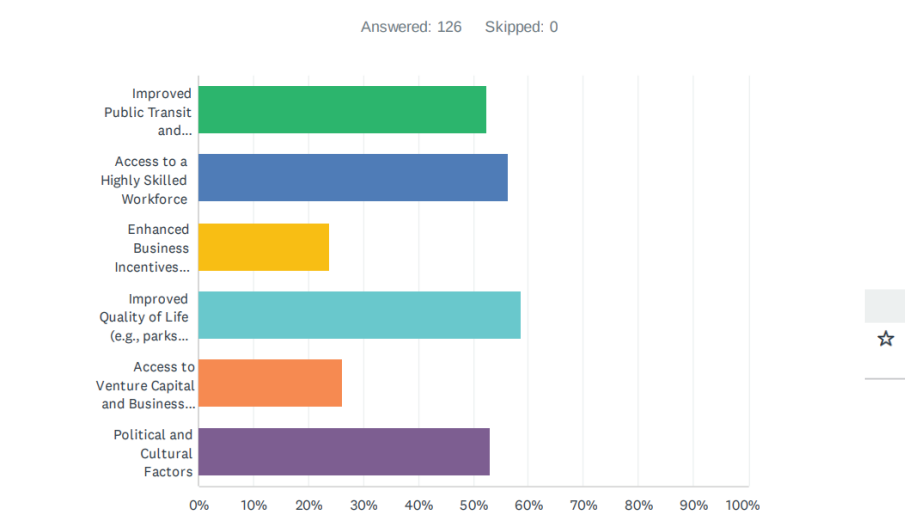
ANSWER CHOICES	RESPONSES	
Healthcare/Biotechnology	51.59%	65
Innovation/Technology/Entrepreneurship	57.94%	73
Heritage Tourism/Arts/Culture (e.g., First Americans Museum, Route 66, Festivals)	45.24%	57
Recreational Tourism/Events (Oklahoma River, Softball, SEC athletics)	40.48%	51
Bio-agriculture/Green Energy Technology	48.41%	61
Additional MAPS Projects	45.24%	57
Total Respondents: 126		

[LINK TO ALL QUESTION 3 ANSWERS](#)

[LINK TO ALL QUESTION 2 ANSWERS](#)

CEDS Survey Results Continued

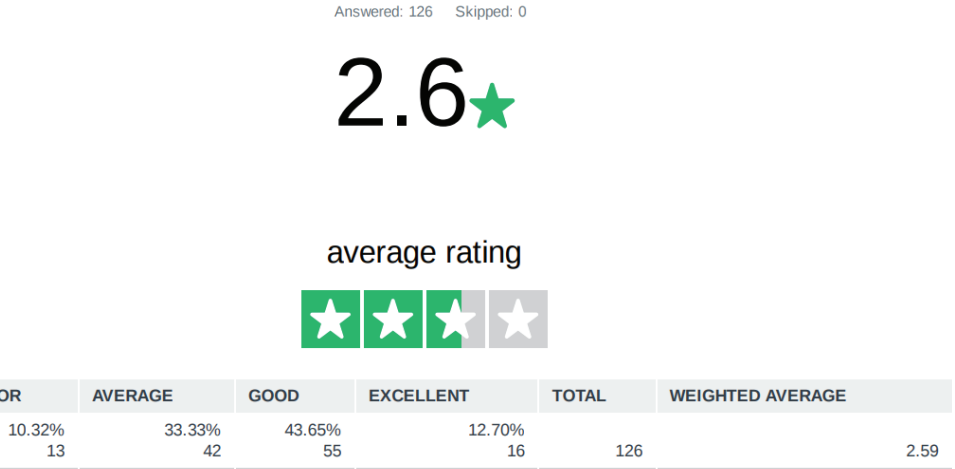
Q4 What would make Central Oklahoma more attractive for businesses and startups? Select all that apply.



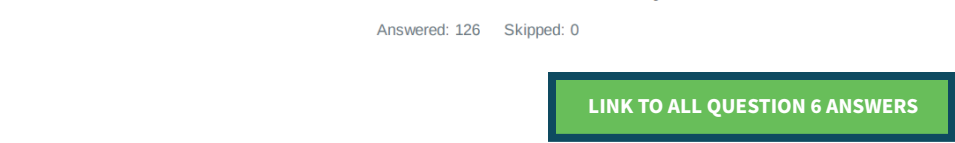
ANSWER CHOICES	RESPONSES	
Improved Public Transit and Infrastructure	52.38%	66
Access to a Highly Skilled Workforce	56.35%	71
Enhanced Business Incentives (e.g., grants, tax breaks)	23.81%	30
Improved Quality of Life (e.g., parks, schools, housing)	58.73%	74
Access to Venture Capital and Business Incubators	26.19%	33
Political and Cultural Factors	53.17%	67
Total Respondents: 126		

LINK TO ALL QUESTION 4 ANSWERS

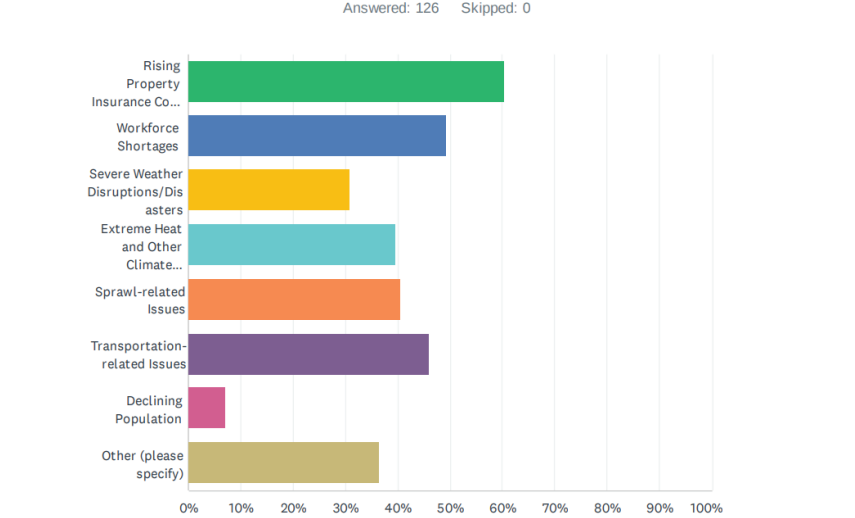
Q5 How would you rate the overall quality of life in Central Oklahoma?



Q6 What do you think are the biggest opportunities for economic growth in Central Oklahoma over the next 10 years?



Q7 What potential threats or risks do you believe could negatively impact the region's economy in the future? Select all that apply.



ANSWER CHOICES	RESPONSES	
Rising Property Insurance Costs & Other Housing-Related Issues	60.32%	76
Workforce Shortages	49.21%	62
Severe Weather Disruptions/Disasters	30.95%	39
Extreme Heat and Other Climate Challenges	39.68%	50
Sprawl-related Issues	40.48%	51
Transportation-related Issues	46.03%	58
Declining Population	7.14%	9
Other (please specify)	36.51%	46
Total Respondents: 126		

LINK TO ALL QUESTION 7 ANSWERS

Q8 In your opinion, what role should local government and public agencies play in promoting economic development in Central Oklahoma?





Association of Central Oklahoma Governments

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