



ASSOCIATION OF
CENTRAL OKLAHOMA
GOVERNMENTS

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY 2025-2029

**WORKING
DRAFT**

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 Comprehensive Economic Development Strategy (CEDS) with updates in 2021 and 2025.

ACOG complements and supplements local government activities but is not a governmental unit. 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**.



TABLE OF CONTENTS

About the Comprehensive Economic Development Strategy (CEDS)	1
How to Use the CEDS.....	1
Guiding Plans & Regional Alignment.....	1
Regional Vision	3
Summary Background	3
Environmental & Geographic Assets	5
Infrastructure Assets.....	6
Broadband.....	7
Economic Sectors & Industry Clusters	8
Aerospace & Aviation.....	8
Logistics	8
Energy	9
Biotechnology.....	9
Workforce Development.....	9
Affordability & Quality of Life.....	11
Conclusion	11
SWOT Analysis: Strengths	12
MAPS Projects: A Transformative Catalyst in Central Oklahoma	12
Geographic Advantages.....	14
Diverse Industries.....	14
Comparatively Low Cost-of-Living.....	14
Tribal Nations.....	15
SWOT Analysis: Weaknesses	18
Transportation & Infrastructure	18
Education.....	18
Healthcare	18
Regional Collaboration	18
SWOT Analysis: Opportunities	19
Tourism.....	19
Cultural & Heritage Tourism	19
Recreational & Sport Tourism.....	20
Oklahoma Biotech Innovation Cluster & the Innovation District.....	21
Regional Connectivity: Passenger Rail	22
Energy Diversification	22
SWOT Analysis: Threats	23
Housing Challenges	23
Inadequate Transit Solutions.....	24
Environmental Threats.....	24
Resilience	26
Understanding Resilience	26

The Growing Need for Resilient Buildings.....	27
Risk: Natural Hazards.....	27
Strategic Direction/Action Plan	29
Goal 1.....	29
Goal 2.....	33
Goal 3.....	35
Evaluation Framework.....	36
Appendix I	36
Resources	36
Appendix II	39
CEDS Advisory Group.....	39
Appendix III	40
Stakeholder Engagement	40
Appendix IV.....	46
Educational Assets	46
Appendix V.....	53
Target and Complementary NAICS Codes	53

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ABOUT THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDDS)

This Comprehensive Economic Development Strategy (CEDDS) is a document for the ACOG 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 region 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 CEDDS

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 rationale that can be used to obtain grants to fund implementation and align federal and states' legislative agendas to collaboratively solicit funding.

Collaborate: The work will engage organizations and departments within jurisdictions to break down silos and leverage resources to the greatest extent possible to elevate one another's work.

GUIDING PLANS & REGIONAL ALIGNMENT

This CEDDS 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 CEDDS 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



This CEDS is developed to strengthen the economic resiliency of the CAPEDD region. The process and plan require the ability to anticipate risks, evaluate how those risks might impact key economic assets, and build capacity to respond to shocks and disruptions that may arise due to:

1. Events or downturns in the national or global economies that impact consumer spending and demand for local goods and services;
2. Downturns in a regions major industries; and/or
3. Disasters (natural or man-made), climate changes, loss of a major employer, or other external shock.

The region conducted a CEDS Update Plan in 2021, in response to the COVID-19 pandemic and will maintain Resilience updates to this CEDS moving forward.

The approach to each focus area of the Strategic Action Plan was developed and clearly outlined with connectivity, alignment, equity, and resiliency in mind. This intentionality in planning and implementation aims to increase durability and flexibility in the regional economy. Strengthened communication, collaboration, and information sharing are significant themes throughout the as CAPEDD positions itself as a convener and trusted information source for the region.

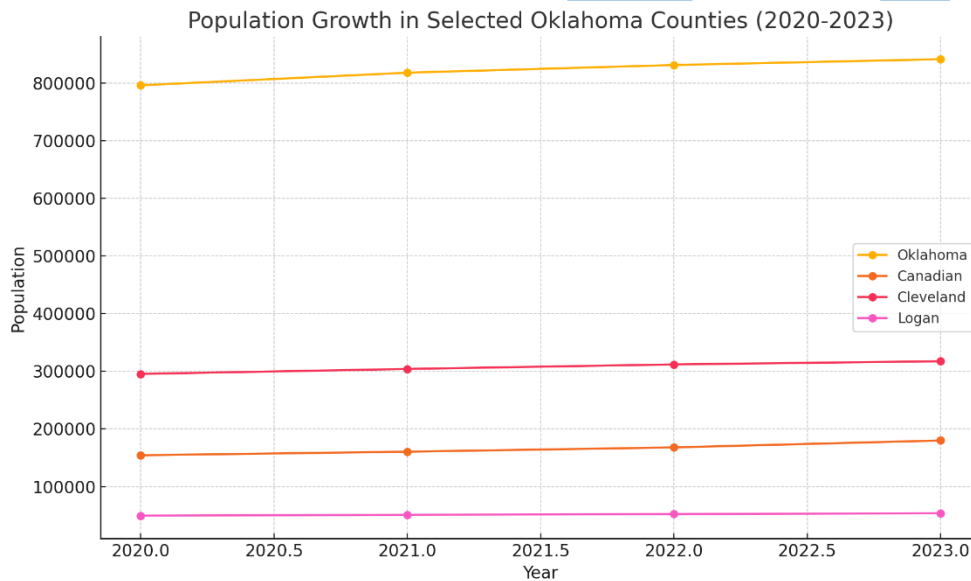


REGIONAL VISION

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.



From 2020 to 2023, central Oklahoma counties have shown notable population growth.

Source: U.S. Census Bureau American Community Survey

Canadian County: Leading the state in growth, Canadian County expanded by about 17% 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 7% from 2020 to 2023. This growth rate supports its role as a core residential area within the metro, particularly around Norman and surrounding communities, such as Noble and Goldsby.

Logan County: Known for its rural character and historically preserved built environment with proximity to the metro, Logan County's population has grown more modestly compared to

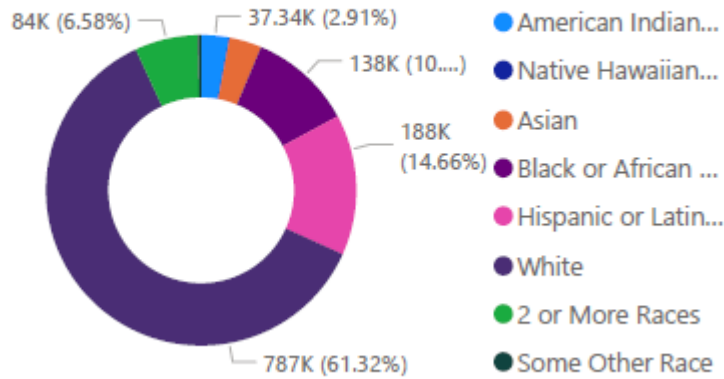
Canadian and Cleveland but remains one of the fastest-growing rural counties in Oklahoma, increasing by about 5% over the same period.

Oklahoma County: Although larger in population and more established, Oklahoma County also saw growth of around 3%, driven primarily by urban development and population gains in Oklahoma City itself.

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. Research has shown that this may also lead to more vibrant, innovative and entrepreneurial communities. Source: <https://www.nber.org/papers/w17640>

Ethnic and Racial Demographic of Region

Source: U.S. Census Bureau American Community Survey



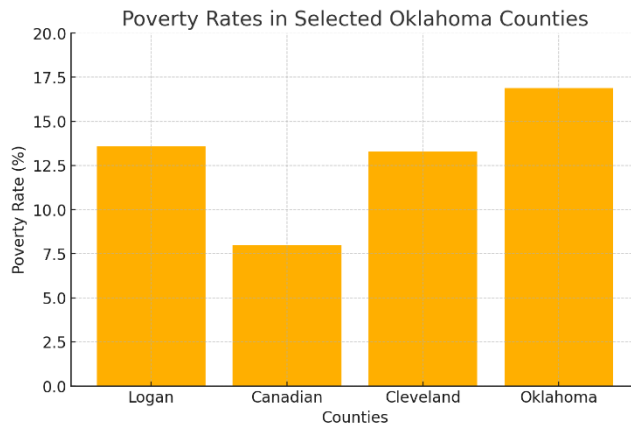
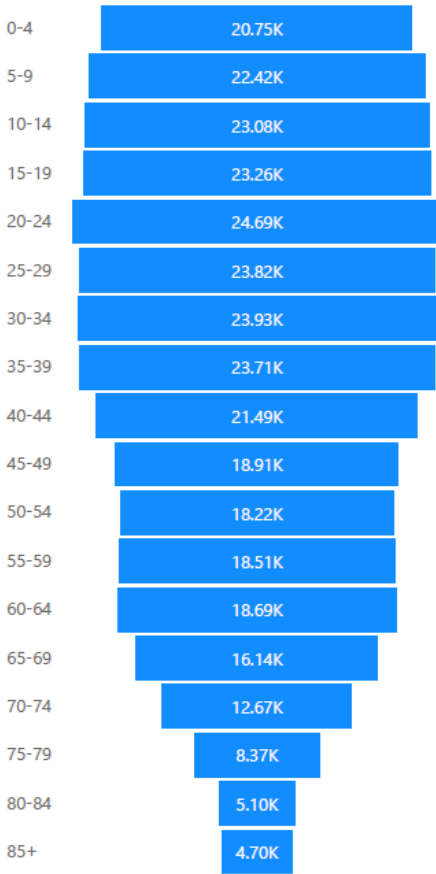
Source: U.S. Census Bureau American Community Survey

The age distribution in Oklahoma, Logan, Canadian, and Cleveland counties reveals both opportunities and challenges for workforce planning. The Oklahoma City metro area, including these counties, 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. Source: Oklahoma Human Services.

Age Distribution for Region

Source: U.S. Census Bureau American Community Survey



Source: U.S. Census Bureau American Community Survey

Source: U.S. Census Bureau and IndexMundi

Canadian County stands out with the highest median household income of around \$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 around \$59,000, aligning closely with the state median, while Logan County has a median income slightly below the state average at about \$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, and Hispanic communities, so income regionally is still inequitable.



ENVIRONMENTAL & GEOGRAPHIC ASSETS

Central Oklahoma's geographic landscape includes diverse environmental features. The western part of the region is within the Central Great Plains ecoregion, and the eastern portion is within the Cross Timbers region. 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.

The region is bisected by the North Canadian River. The seven-mile stretch of river that runs through Oklahoma County was originally a dry riverbed with water averted to avoid flooding nearby downtown Oklahoma City. A \$53 million MAPS project completed in 2004 rejuvenated the river, creating the seven-mile, dam-controlled body of water now known as the Oklahoma River.



The Boathouse District was established in 2006 with the opening of the Chesapeake Boathouse. It has rapidly grown to include a row of iconic boathouses along the river, the world-class Chesapeake Finish Line Tower, and RIVERSPORT Adventure Park. Since then, the Devon Boathouse, Chesapeake Finish Line Tower, University of Central Oklahoma Boathouse, RIVERSPORT Adventures and the SandRidge Youth Pavilion and the RIVERSPORT Rapids whitewater center have opened with more development planned.

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. See Opportunities for more information.

INFRASTRUCTURE ASSETS

The region's infrastructure is robust, with well-developed transportation networks, including major interstate highways (I-35, I-40, I-44) and several turnpikes: John Kilpatrick Turnpike, Turner Turnpike, H.E. Bailey Turnpike, Kickapoo Turnpike, Chickasaw Turnpike and the Indian Nation Turnpike. These all provide critical links to other regions and states.

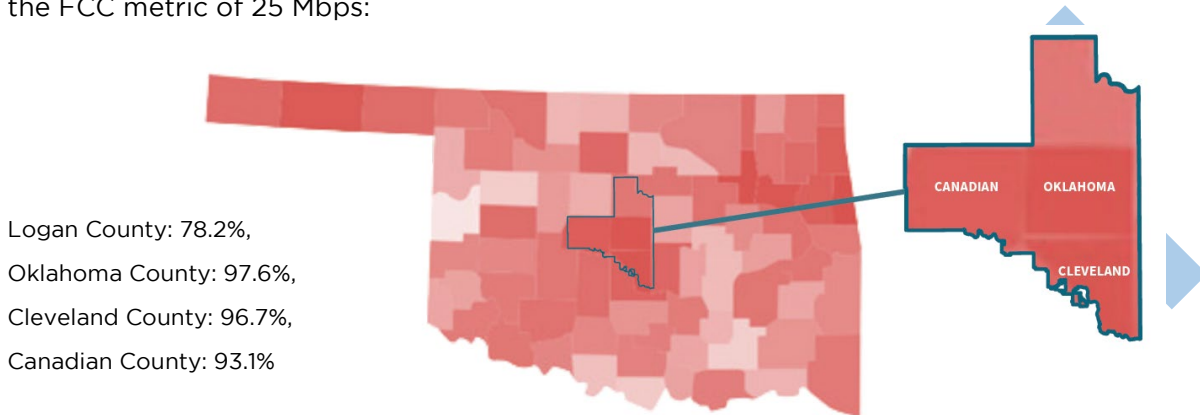


The newly renamed Will Rogers International Airport in Oklahoma City is a key asset, facilitating both domestic and international travel and supporting the region's logistics and tourism sectors. The airport continues to add to its network of nonstop destinations, connecting the region in every direction.

In terms of utilities, Central Oklahoma has a reliable energy distribution system supported by local and regional providers. Water and sewer infrastructure is well-established in the urban areas, though ongoing investments are needed to support future growth, as much of the region's growth is in the suburbs and exurbs. The rural areas of the region are underfunded and overly reliant on sales tax to meet community infrastructure needs for roads, sewer, and water facilities.

BROADBAND

The expansion of broadband services is a consensus regional priority, to enhance digital connectivity and support economic development 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 culminates in October 2024, and then Eligible Determination Locations will be finalized in January 2025. A current snapshot of digital adoption status regionally is below, using the FCC metric of 25 Mbps:



Source: BroadbandNow.com

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 much of their shopping and entertainment.

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ECONOMIC SECTORS AND INDUSTRY CLUSTERS

AEROSPACE + AVIATION

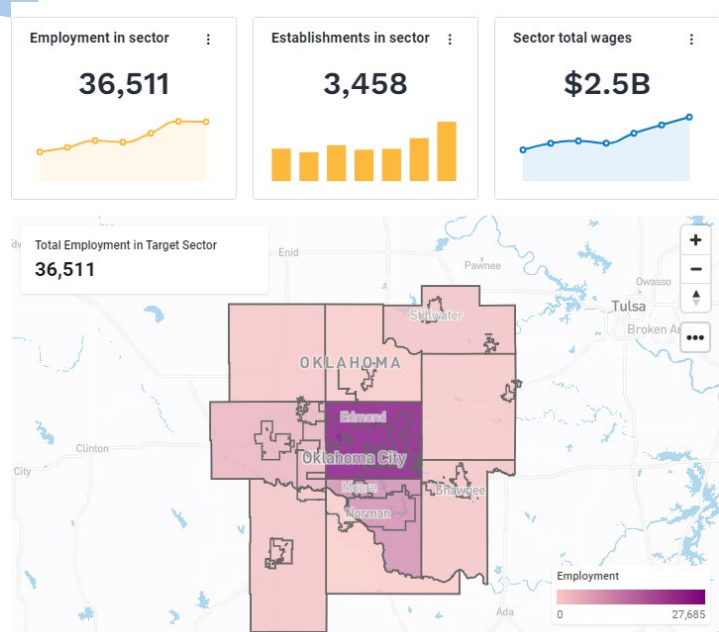
Research and development in aerospace have been ongoing in the region for decades, with a particular focus on unmanned systems in the most recent decade. Oklahoma's legacy of aviation leadership includes aviation pioneers like Clyde Cessna and Wiley Post, and it was leadership from Oklahoma U.S. Senator 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 and the Sustainment Headquarters of the United States Air Force in Midwest City is the largest single-site employer in both the region and the state, with over 26,000 employees. Annually, the base generates approximately \$1.6 billion in jobs, and its total economic impact totals \$4.83 billion. The State is also home to many large and small aviation, aerospace, and cyber-related companies.

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.

LOGISTICS

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.



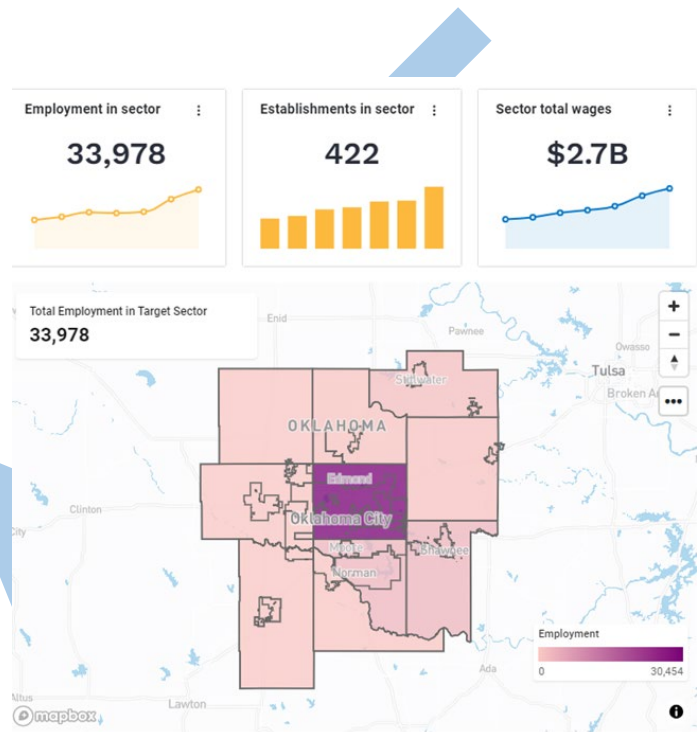
ENERGY

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 region offers a powerful, sustainable combination of technical manufacturing proficiency and workforce; alternative and conventional energy industry expertise; centralized, readily accessible location; raw ingredients to power the world today and tomorrow, like CNG, wind, and solar; and one of the most high-value environments for solar/wind manufacturing and logistics.

BIOTECHNOLOGY

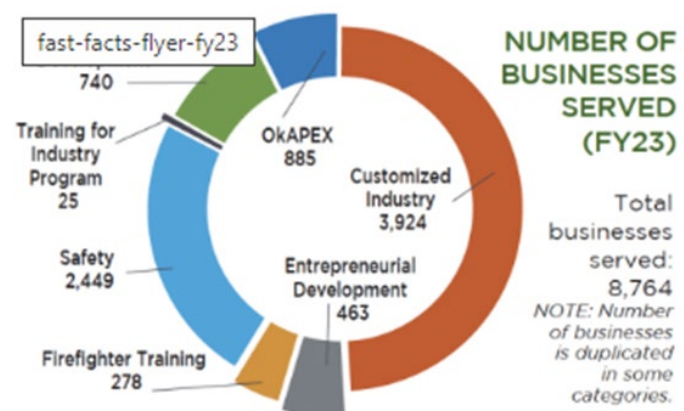
Ground-breaking discoveries made by Oklahoma City-based researchers have helped put the region on the map as a contender in the bioscience and technology marketplace. One of the most significant factors in this area's biotech boom is the powerful symbiotic relationship between entrepreneurs, clinical 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. 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 (El Reno, OKC, Guthrie, Choctaw, Yukon, Tinker AFB, Edmond, Midwest City, and Norman), 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 (employee recruitment and retention) as a top two 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 will be comprised of nine members from the private sector, is tasked with administering the Workforce Coordination Revolving Fund, which was appropriated \$5 million to coordinate workforce development activities. The Workforce Commission is tasked with coordinating and developing the state’s workforce, using public and private funds to carry out a focused workforce plan.

TARGET AND 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. For additional information on projected Target Sector needs, see the Appendix.

Table 12: Target Sector Projected Growth

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



Table 12 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. All target sectors are projected to grow with the exception of the energy sector.

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.

Oklahoma City'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.**



Oklahoma City'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 city'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 relatively affordable housing, expanding job market, and thriving community. Our 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 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 resilience and prosperity.



SWOT ANALYSIS: STRENGTHS

- Metropolitan Area Projects (MAPS)
- Geographic Advantages
- Diverse Industries
- Comparatively Low Cost of Living
- Tribal Nations

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 is 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, Chesapeake Energy Arena, Civic Center Music Hall, State Fairgrounds Improvements, Ronald J. Norick Downtown Library, Oklahoma River, and Oklahoma Spirit Trolleys.

MAPS FOR KIDS

The \$700 million OCMAPS "MAPS for Kids" school program, approved in 2001, included hundreds of construction, transportation and technology projects — all for the benefit of the region's public school students. Seventy new and renovated schools located in Oklahoma City, Edmond, Norman, and Yukon, totaling \$470 million in construction, are now completed.



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: Convention Center, Scissortail Park, Oklahoma City Streetcar, Oklahoma State Fairground Improvements, Senior Health & Wellness Centers, Oklahoma River Improvements, Trails, and Sidewalks.

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: The Clara Luper Civil Rights Center, 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, Transit, Sidewalks/bike lanes/trails/streetlights, Homelessness, Paycom Center/Related Facilities, Animal Shelter, Fairgrounds Coliseum, Innovation District, Beautification, and a Multi-Purpose Stadium.



GEOGRAPHIC ADVANTAGES

Central Oklahoma, situated within the I-35 Megalopolis stretching from Kansas City to San Antonio, serves as 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

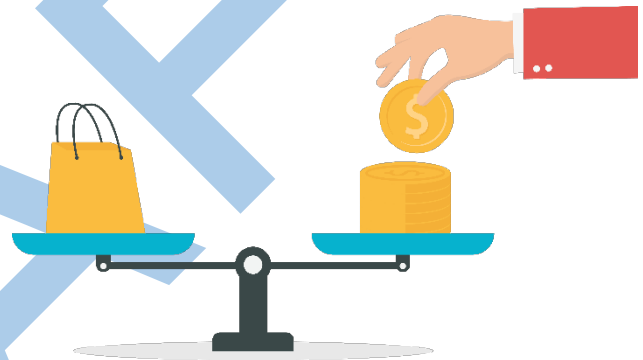
The **Cost-of-Living Index** is typically based on a score where 100 represents the national average. A score below 100 means the area is less expensive than the national average, while a score above 100 indicates it's more expensive.

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 area 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, although it is rising, is 34% lower than the U.S. average.

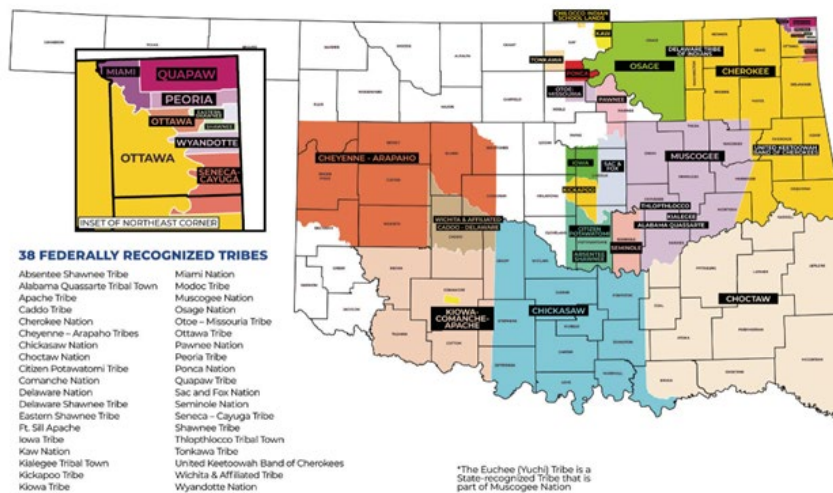
Oklahoma County: Oklahoma County, where Oklahoma City is located, has a cost-of-living score of 85.1. This is one of the lowest among large U.S. cities, making it an affordable option, particularly in housing and transportation costs. Sources: GreaterOklahomaCity.com, Best Places



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.



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. However, 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 and services

CULTURAL & HISTORICAL IMPACT

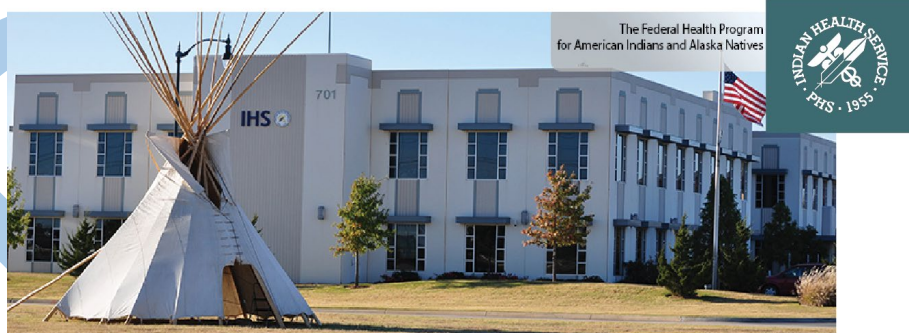
The economic influence of tribal nations is intertwined with their cultural and historical significance. Oklahoma is home to 39 federally recognized tribes, many of which were forcibly relocated to the region in the 19th century. This history of resilience and cultural preservation has left an indelible 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 serves 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.



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.

CHALLENGES IN MEASURING TRIBAL ECONOMIC CONTRIBUTIONS

As noted, one of the reasons the full scope of tribal economic contributions is underreported is tied to data privacy and sovereignty. 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, 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.

DRAFT



SWOT ANALYSIS: 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 region is experiencing a teacher shortage, which impacts the public education system, as does the increasingly politicized climate around education policy at the state level.

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.



SWOT ANALYSIS: 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.

CULTURAL & HERITAGE TOURISM

CASE STUDY: FIRST AMERICANS' MUSEUM AND 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 Oklahoma City, at the Crossroads of America, the confluence on Interstates 35, 40, 235 and 44. FAM is positioned along the Oklahoma River across from downtown. FAM serves as a starting point to explore First American attractions throughout Oklahoma.



“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.

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. (Source: Oklahoma City Convention and Visitors Bureau)

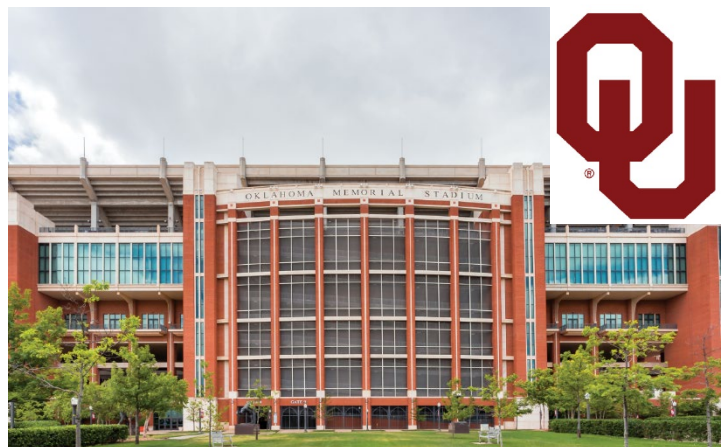
OKC THUNDER - NBA

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 and induced 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.



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. Source: VisitNorman.com



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 and sits 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 advancing Oklahoma City’s bioscience sector, the region is now at a crucial juncture for scalable, inclusive growth. Since 2001, industry employment has risen by 25 percent, biomedical R&D activity has more than doubled, and major economic development organizations have introduced new leadership dedicated to fostering equitable progress.

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 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.



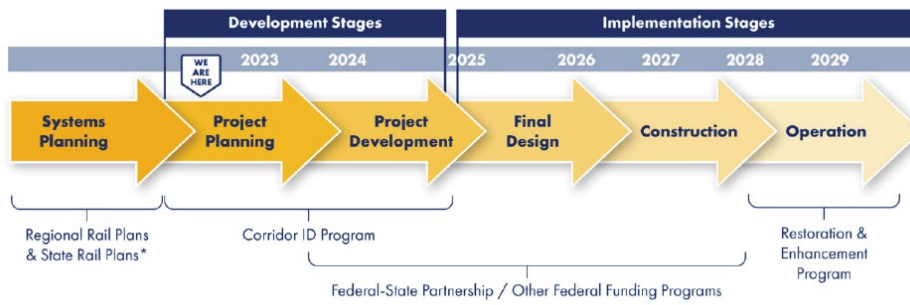
One partner working on these issues is **Oklahoma State University, an EDA-designated University Center**. By focusing on product and business development for companies operating at the intersection of human, animal, and environmental health, they are working to provide a unique and complementary platform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

REGIONAL CONNECTIVITY: PASSENGER RAIL

Last year (2023), the Federal Railroad Administration 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. Additionally, it would relieve regional traffic congestion.



FRA Project Lifecycle Stages - Corresponding FRA Funding Programs



*Regional Rail Planning and State Rail Plans may be funded through other FRA funding programs.

ENERGY DIVERSIFICATION

Fuel cells designed to operate on hydrogen, natural gas, or a blend of both present an economically transformative opportunity for the region. Non-combustion fuel cells are distinctly different than other forms of natural gas power generation because they do not use natural gas as a fuel, but rather solely as a carrier of hydrogen. By leveraging the existing natural gas infrastructure, fuel cells enable cost-effective, scalable deployment of more efficient energy without the need for extensive new infrastructure investments.

This approach not only positions the region as a leader in sustainable energy innovation but also stimulates local job creation and attracts investment in fuel cell manufacturing, maintenance, and associated industries. As the technology evolves toward greater hydrogen integration, the region stands to benefit from increased energy resilience and competitiveness in the efficient and dynamic energy market, all while supporting a transition that minimizes environmental impact.

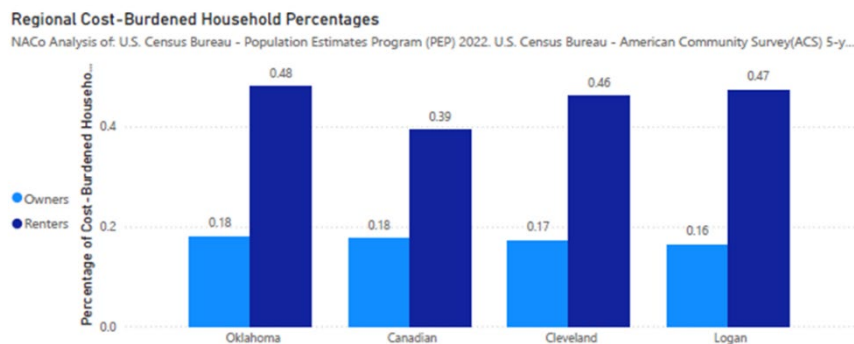
As a form of distributed power, they offer unmatched resilience when faced with severe weather conditions. This means fuel cells are pre-positioned for a future hydrogen economy while enabling immediate emission reductions and carbon capture utilization and sequestration today.



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. **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, which threatens overall housing affordability for many, especially those with lower incomes.



HOME INSURANCE

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

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. Sources: Keys and Mulder, National Bureau of Economic Research (2024), CoreLogic, FEMA, First Street Foundation, Ishita Sen, Harvard Business School (2024), and Zillow.

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 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)

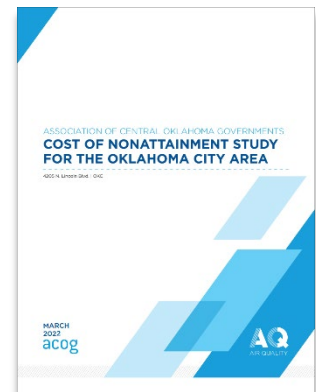
During the last five years as the Oklahoma City area achieved local and national success in economic development and growth, the region has crept closer to violation of the Environmental Protection Agency (EPA) Ozone Standard.

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."

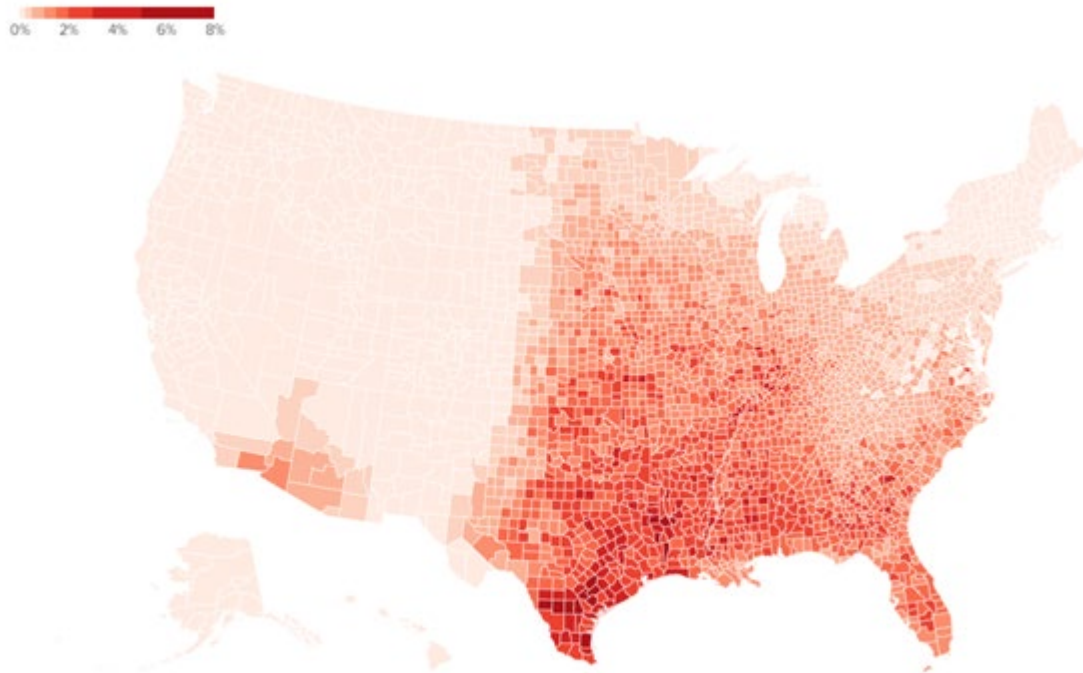
The \$9.5-\$15.2 billion in economic costs identified in this study reinforce the urgent need for the Oklahoma City Area to remain in attainment of the Ozone standard. The financial burdens to the transportation system are also identified - saddling businesses, government agencies, and individuals with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



EXTREME 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.

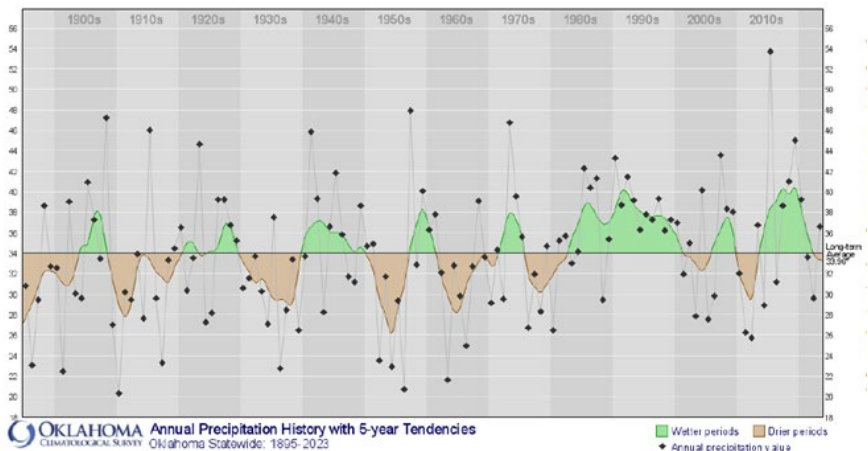


Source: World Economic Forum on workability (years of production working hours lost due to human heat stress) from Woodwell Climate Research Center (WCRC)

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 our 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

UNDERSTANDING RESILIENCE

Central Oklahoma faces a range of challenges, from sudden events like natural disasters, pandemics, cyberattacks, and infrastructure failures to ongoing issues such as aging infrastructure, environmental concerns, climate-related extreme weather, social inequality, affordable housing shortages, food insecurity, economic downturns, and poverty. These shocks and stressors affect the region's security, economy, environment, and overall well-being. For the purposes of this CEDS, resilience is defined as the ability to prepare for these threats and hazards, adapt to changing conditions, withstand and recover rapidly from adverse events and disruptions.

Given the interconnected and evolving nature of people, places, and systems, building resilience requires a collective approach—one that engages all sectors and disciplines, all levels of government, the private and non-profit sectors, academia, communities, families, and individuals. This approach must address the multiple facets of resilience, including climate, ecosystem, cultural, social, economic, infrastructure, and disaster resilience, and consider their interdependencies. By recognizing and addressing these challenges through a collaborative, community-wide approach, Central Oklahoma can build resilience to withstand and recover from these challenges while fostering long-term growth and vitality. Strengthening resilience also involves proactively improving systems to benefit and protect communities, developing integrated, multi-objective solutions that comprehensively address shocks and stressors, and ensuring that people, places, and systems can adapt and evolve in ways that support resilience for current and future generations.

KEY TERMS

Shocks are short-duration, rapid-onset or acute events that disrupt normal life.

Stressors are chronic, slow-onset or longer-term conditions that weaken a community over time, worsen the impacts of shocks, and negatively affect community functions and well-being.

Threats include capabilities, intentions, and attack methods of adversaries used to exploit circumstances or occurrences with the intent to cause harm. A threat is directed at an entity, asset, system, network, or geographic area.

Hazards are a source of actual or potential harm or difficulty. Unlike threats, a hazard is not directed.

The terms “shock” and “stressor” are commonly used in the field of resilience. Other related fields often use the terms “threat” and “hazard.” These four terms are related but look at things from different angles. Shocks and stressors are distinguished primarily by duration, while threats and hazards are distinguished primarily by intentionality.

Source: FEMA, 2024.

THE GROWING NEED FOR RESILIENT BUILDINGS

The National Oceanic and Atmospheric Administration (NOAA) estimates that since 1980 there have been 376 disaster events exceeding over \$1 billion in damages and over that forty-year period damages totaled over \$2.655 trillion. Of these, 173, or 54%, have occurred in the last decade. A 2024 study completed by the Federal Emergency Management Agency (FEMA) study ranked states and territories with the lowest ranking for adopting hazard-resistant building codes, **meaning less than 25% of their jurisdictions were covered by the latest hazard-resistant code.** (2024

Building Code Adoption Tracking Overview, FEMA, February 2024). Slow adoption of hazard-resistance building codes in these states and territories has economic consequences, with expected annual losses (EAL) of over \$13.1 billion to total building value. **In Oklahoma, less than 25% of tracked jurisdictions are ranked hazard resistant.**

ACOG supports regional adoption of the 2024 IBC to increase resilience from tornados and high winds.

RISK: NATURAL HAZARDS

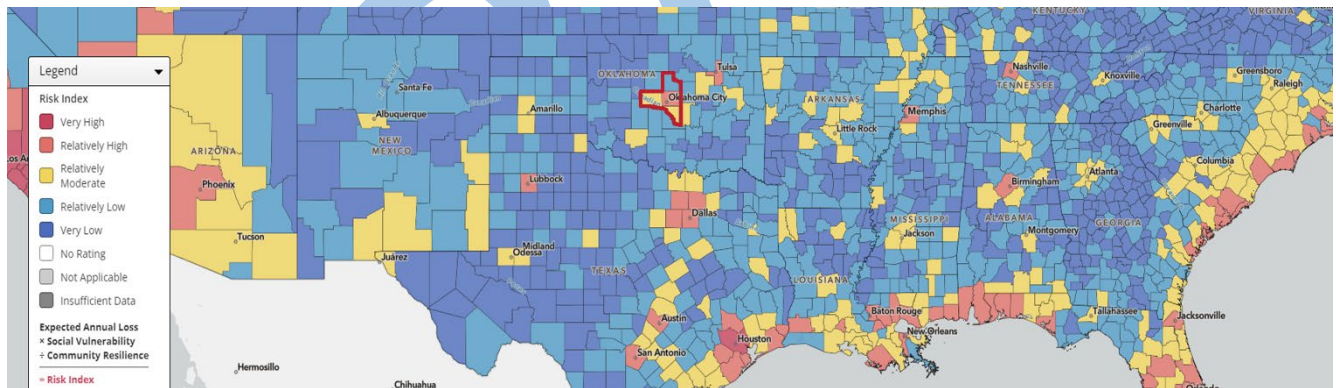
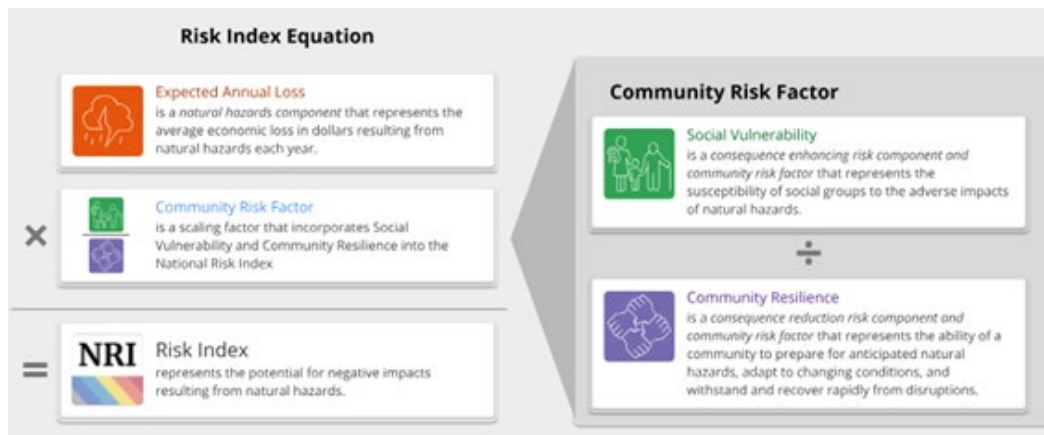


Figure 1: Lower, Moderate, and Higher Hazard-Resistance

Source: FEMA.gov/BCAT

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: $\text{Expected Annual Loss} \times \text{Social Vulnerability} \div \text{Community Resilience} = \text{Risk}$. **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)



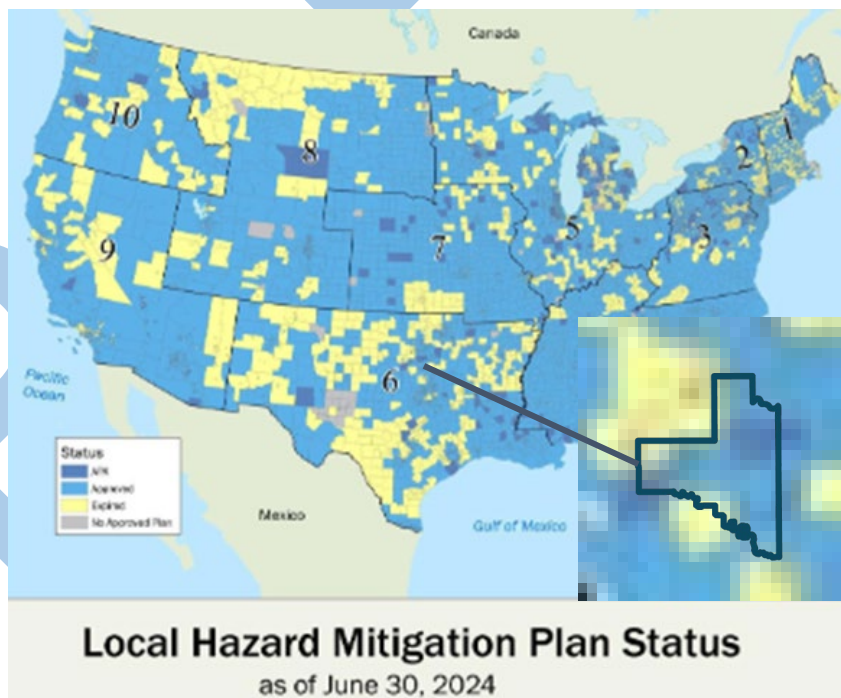
Hazard Mitigation Plans (HMP) help communities in our region to prepare for natural hazards and disasters. The State of Oklahoma has a current HMP in place, as do all four counties in the region. **Action item: Support communities in developing and maintaining current HMPs as a tool to increase resilience**

THE NEED FOR A RESILIENT BUILT ENVIRONMENT

Building Code: The Federal Emergency Management Agency (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. The latest edition of the Oklahoma state building code is based on the 2018 IBC and 2018 IRC, is mandatory statewide, and went into effect on 09/14/2021 (IBC) and 09/14/2022 (IRC).

However, in the newly published IBC 2024 design provisions for tornado loads are now required 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). **Tornado hazards have not previously been required 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. This gap is addressed for the first time in ASCE/SEI 7-22 which now includes requirements for tornado loads.**

Action: Support regional adoption of the 2024 IBC to increase resilience from tornadoes and high winds.





STRATEGIC DIRECTION/ACTION PLAN

GOAL ONE: Focus on cost-of-living affordability and quality of life to support continued regional growth. Timeline: 1-3 years.

ACTIONS AND 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

Funding Mechanisms

Several state and federal grant programs can provide funding for hazard mitigation projects. For example, the EPA's Hazard Mitigation Grant Program (HMGP) gives money to states, tribes and territories implementing hazard mitigation after federally declared disasters. The Building Resilient Infrastructure and Communities (BRIC) Grant is available to states that have had a federally declared disaster within the past seven years. It provides funding for hazard mitigation projects that promote climate adaptation and resilience.

Some states are implementing their own mitigation grants. Oklahoma has taken action on this important priority – see Case Study below.

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%. (Source: Oklahoma Insurance Department).

3. Proactively work with stakeholders, developers, and governments to increase housing supply and lower housing costs

**ACTIONS AND STRATEGIES:
Locally Driven Solutions Around the Country**

Communities are experimenting, innovating and restoring housing options to support increases in housing supply.



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.

Source: Housing Supply Accelerator Playbook, 2024

CASE STUDY: ADDRESSING HOUSING EQUITY AND 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.

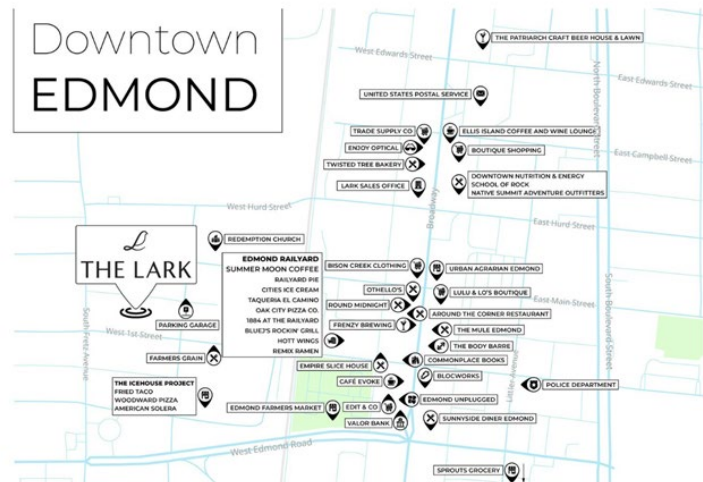
CASE STUDY: EDMOND WALKABLE NEIGHBORHOOD TIF PROJECT

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 TIF will be used to reimburse the city for its upfront costs.

A two-minute walk from...



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

- The CERi Program now uses EDA Planning Grant funds for this innovative 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

- 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.
- Support a policy change to hold Public Hearings for ALL rate increases, not just select cases, as is the current practice.
- Explore limiting how much profit an insurer can earn from premiums to prevent excessive rates with strict profit margin caps.
- Support automatic roll-back mechanisms in place to address higher rates that are later determined to be unjustified.

CASE STUDY:

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-run 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. Often referred to as Fair Access to Insurance Requirements (FAIR) plans, these programs receive financial backing from a combination of premiums and fees levied on other insurance companies issued in the state. 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.

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, ACOG members 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.

DRAFT

GOAL TWO: Strengthen Regional Workforce Development. Timeline 1-3 years.

ACTIONS AND STRATEGIES:

1. Encourage collaboration and coordination of resources, designating one central information clearinghouse for regional workforce development. There are many public and nonprofit stakeholders addressing 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.
 - Central Oklahoma Workforce Innovation Board (COWIB) <https://cowib.org/>
 - UpskillOK <https://upskillok.org/>
 - Oklahoma Department of Career and Technology Education <https://oklahoma.gov/careertech.html>
 - Oklahoma Workforce Commission (no website)
 - Oklahoma Works <https://oklahoma.gov/workforce.html>
 - Oklahoma Works Together <https://oklahomaworkstogether.gov/>
 - A Better Life OKC <https://www.abetterlifeokc.com/employment/>
 - Oklahoma Commerce Workforce Development <https://www.okcommerce.gov/doing-business/business-services/workforce-development/>
 - OKJobMatch <https://okjobmatch.com/>
 - Urban League Workforce and Career Development <https://urbanleagueok.org/ulokc-programs/workforce-and-career-development/>
 - Online Consortium of Oklahoma <https://www.ocolearnok.org/>
 - ShowWhatYouKnowOK <https://showwhatyouknowok.org/Onward OKC>
 - Goodwill Industries <https://goodwillsont.org/workforce-development-center/>
2. Support the development of industry and employer-driven, alternative workforce training and certifications. (See BioTC Case Study)
3. Focus on equitable workforce development initiatives that reach underserved and disenfranchised populations
4. Seek a diverse pool of funders that includes the private, nonprofit, and public sectors

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, Historically Unvisible Black, Brown + Indigenous (HUB+I) population.

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 member Economic Development staff, the Oklahoma City Community Foundation, and other nonprofits.

DRAFT

GOAL THREE: 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 AND 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, and other resources

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.

Outcomes: Strong and diverse business ecosystem that provides resources for new and existing business, 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.

APPENDIX I

RESOURCES

National Economic Resilience Data Explorer (NERDE) – Argonne National Laboratory
<https://nerde.anl.gov/>

Economic Development Capacity Index
<https://disgeoportal.egs.anl.gov/EDCI/>

American Community Survey – U.S. Census Bureau
<https://www.census.gov/programs-surveys/acs>

IndexMundi
<https://www.indexmundi.com/>

BroadbandNow
<https://www.broadbandnow.com>

Oklahoma Broadband Office
<https://oklahoma.gov/broadband.html>

Tinker Air Force Base
<https://www.tinker.af.mil/>

Greater OKC Chamber
<https://www.okcchamber.com/>

Greater Oklahoma City – Economic Development
<https://www.greateroklahomacity.com/>

U.S. Economic Development Administration
<https://www.eda.gov>

BioTC Oklahoma
<https://www.biotcoklahoma.com/oklahoma-innovation-cluster>

The OKC Innovation District
<https://www.okcinnovation.com>

Oklahoma Department of Career and Vocational Technology
<https://oklahoma.gov/careertech.html>

Oklahoma Regents for Higher Education
<https://okhighered.org/>

Central Oklahoma Workforce Innovation Board
<https://cowib.org/>

The Wall Street Journal
<https://www.wsj.com/>

Moody's Analytics
<https://www.moodys.com/>

Oklahoma Native Impact Study
<https://www.oknativeimpact.com/>

Oklahoma State Chamber Research Foundation
<https://www.statechamberresearch.org/>

Best Places

<https://www.bestplaces.net/>

City of Oklahoma City
<https://www.okc.gov>

City of Edmond
<https://www.edmondok.gov>

City of Guthrie
<https://www.cityofguthrie.com>

First Americans Museum
<https://famok.org/>

OKANA
<https://www.okanaresort.com/>

Indian Health Service
<https://www.ihs.gov/>

Oklahoma City Indian Clinic
<https://okcic.com/>

Partner Tulsa
<https://partnertulsa.org/>

Riversport OKC
<https://www.riversportokc.org/>

Applied Economics
<https://aeconomics.com/>

The University of Oklahoma
<https://ou.edu/web/landing/sec1>

The Innovation Foundation at Oklahoma State University
<https://theinnovationfoundation.okstate.edu/>

Oklahoma Department of Transportation
<https://www.ODOT.gov>

Kansas Department of Transportation
<https://www.KDOT.gov>

U.S. Department of Energy
<https://www.energy.gov>

U.S. Department of Agriculture
<https://www.usda.gov/>

National Bureau of Economic Research
<https://www.nber.org/>

CoreLogic
<https://www.corelogic.com/>

Zillow
<https://www.zillow.com>

Harvard Business School
<https://www.hbs.edu/>

Association of Central Oklahoma Governments

<https://www.acogok.org>

FEMA

<https://www.fema.gov/>

Center for Climate and Energy Solutions

<https://www.c2es.org/>

Oklahoma Insurance Department

<https://www.oid.ok.gov>

State of Louisiana

<https://ldi.la.gov/>

Housing Supply Accelerator Playbook

<https://www.planning.org/publications/document/9289884/>

Oklahoma Community Land Consortium

<HTTPS://OK-COMMUNITY-LAND-CONSORTIUM.SQUARESPACE.COM/>

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APPENDIX II

CEDS ADVISORY GROUP

Rod Cleveland, Cleveland County
Commissioner, Chair

Richard Clements, Greater OKC Partnership

Shane Hampton, OU Institute for Quality
Communities

DeAndre Martin, OKC Innovation District

Ray Poland, Mayor of Jones

Phil Freeman, Mayor of Noble

Julie Shannon

Todd Stone, City Council, OKC, Ward 4

Brendon Summerville, City Planner

Sarah Huffine

Richard Clements, Greater OKC Chamber

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.

ACOG Staff:

Mark W. Sweeney, AICP, Executive Director

John Sharp, Deputy Director

Sharon Astrin, Manager, CED

Eric Pollard, Manager, Clean Cities & Air
Quality

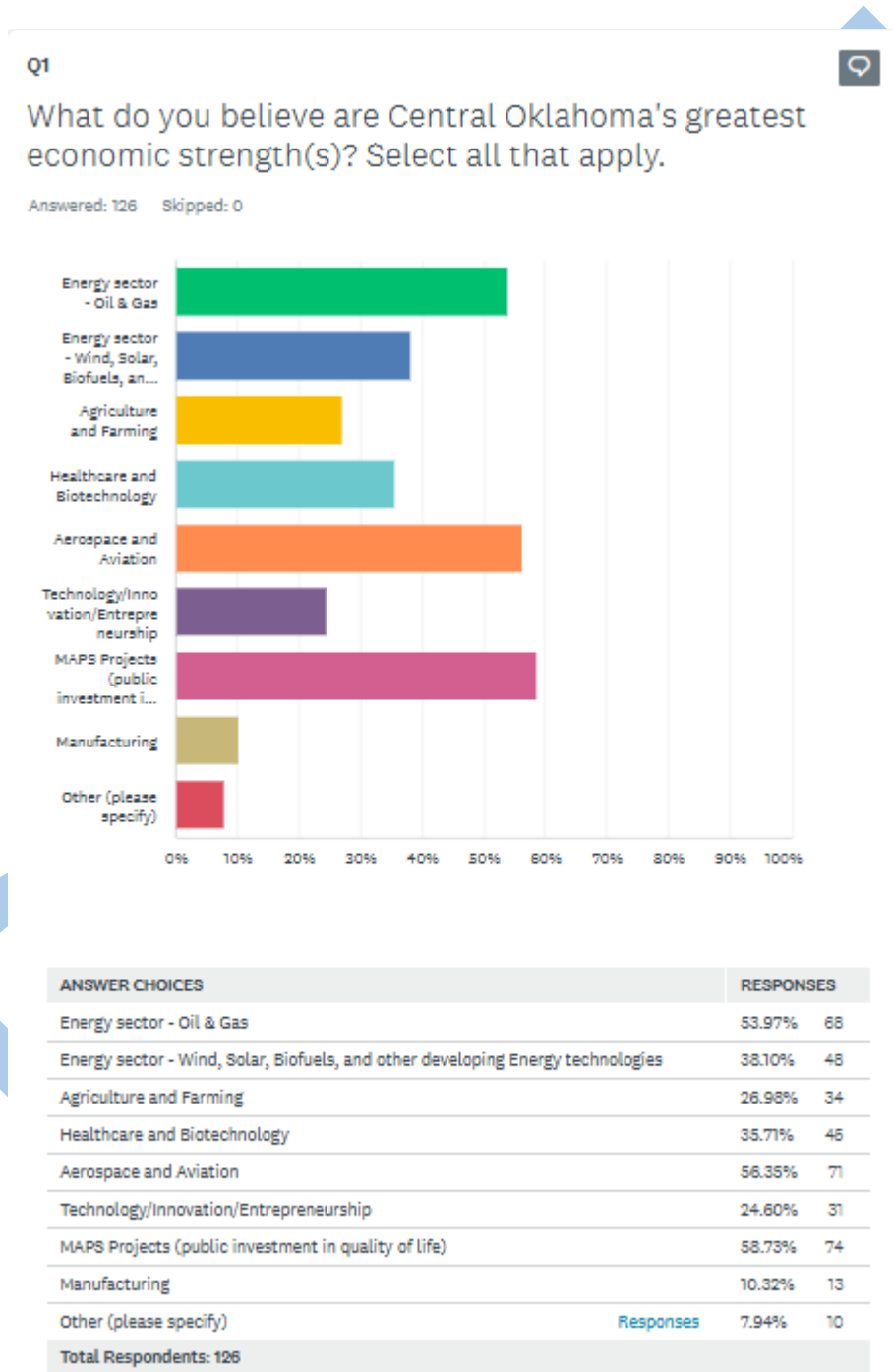
Maria DeLoera, Planner I, CED

APPENDIX III

STAKEHOLDER ENGAGEMENT

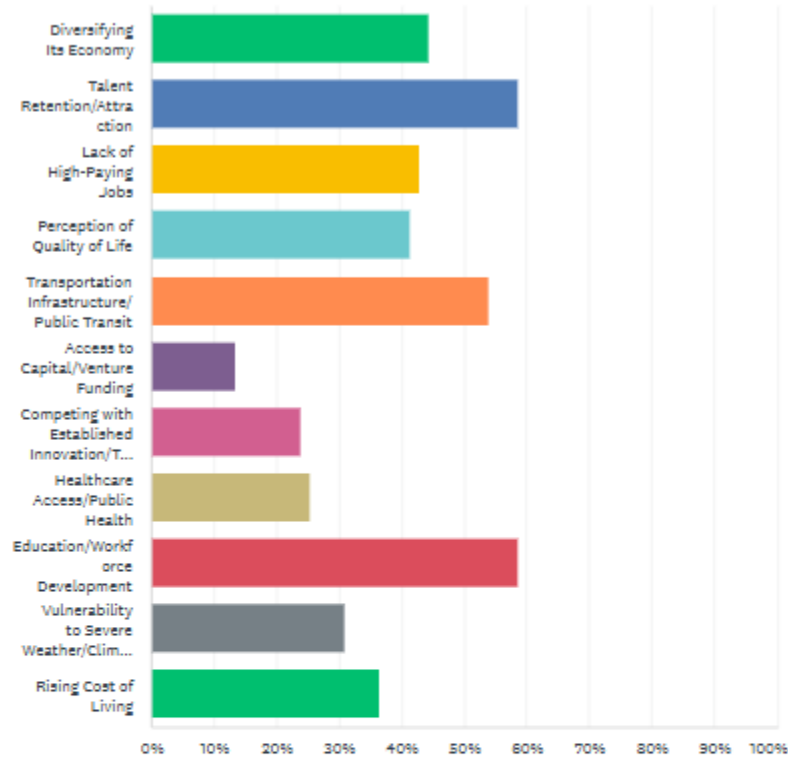
CAPEDD conducted an eight-question survey via Survey Monkey, to ensure that there was broad public input to the CEDS. The survey was heavily promoted with paid social media, posters with QR codes in state buildings, libraries, and other public places, and targeted email blasts to stakeholders.

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



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

Answered: 126 Skipped: 0



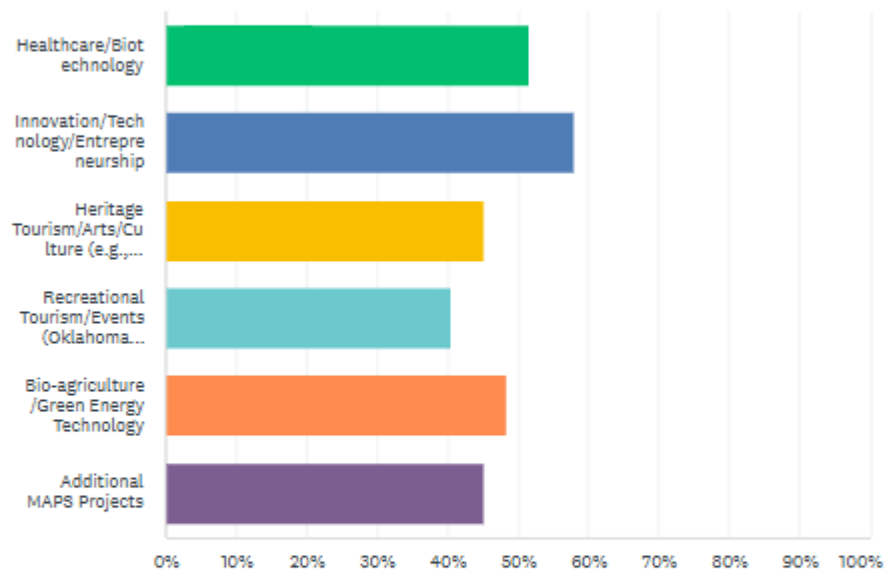
ANSWER CHOICES	RESPONSES	
Diversifying Its Economy	44.44%	66
Talent Retention/Attraction	58.73%	74
Lack of High-Paying Jobs	42.86%	64
Perception of Quality of Life	41.27%	62
Transportation Infrastructure/Public Transit	53.97%	68
Access to Capital/Venture Funding	13.49%	17
Competing with Established Innovation/Tech 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.

Answered: 126 Skipped: 0



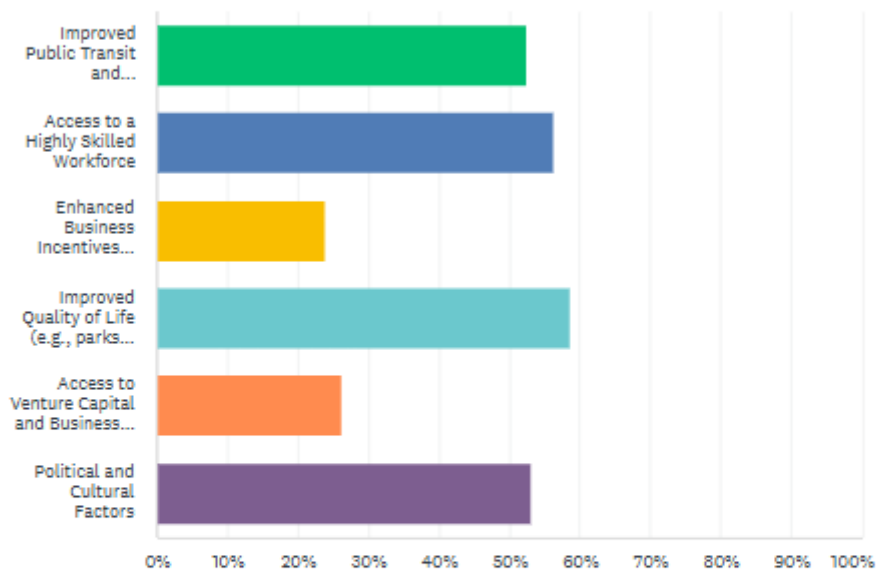
ANSWER CHOICES	RESPONSES
Healthcare/Biotechnology	51.59% 65
Innovation/Technology/Entrepreneurship	57.94% 73
Heritage Tourism/Arts/Culture (e.g., First Americans Museum, Route 66, Festivals)	45.24% 57
Recreational Tourism/Events (Oklahoma River, Softball, SEC athletics)	40.48% 51
Bio-agriculture/Green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

Q4



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

Answered: 126 Skipped: 0



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		

Q5



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

Answered: 126 Skipped: 0

2.6★
average rating



	POOR	AVERAGE	GOOD	EXCELLENT	TOTAL	WEIGHTED AVERAGE
★	10.32% 13	33.33% 42	43.65% 55	12.70% 16	126	2.69

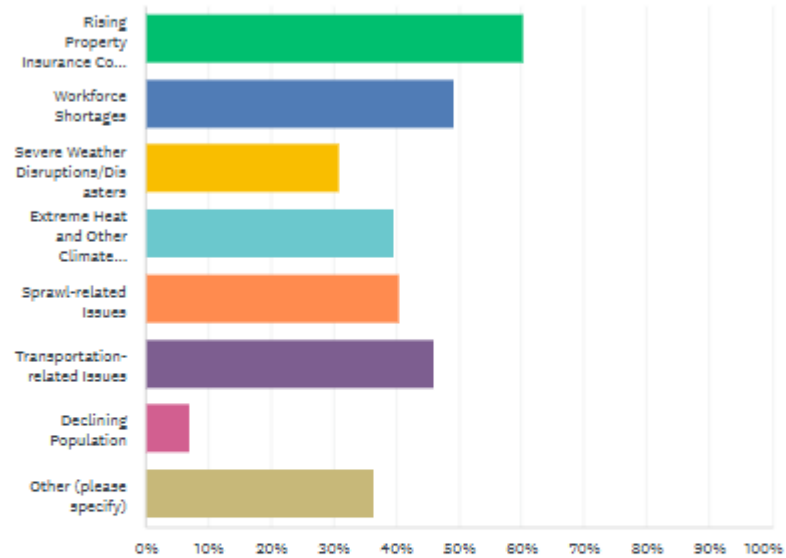


Q7



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

Answered: 126 Skipped: 0



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)	Responses 36.51%	46
Total Respondents: 126		

Q8



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

Answered: 126 Skipped: 0

Keeping cost of living reasonable and improving quality of life/culture through public programs to make the state more attractive to a diverse and talented workforce.

11/1/2024 12:18 PM

Help all people, advance all areas not just Edmond.

11/1/2024 08:58 AM

Regulation and providing non monetary help. Guidance and education. Providing opportunities and connections.

10/31/2024 12:41 PM

Little, unless it's securing funding or grants for small businesses. Let it happen and step in if needed.

10/31/2024 10:46 AM



APPENDIX IV

EDUCATIONAL ASSETS

Educational Assets

Table 9: Educational Assets

Institution	Institution Type	City	County	Degree Types
Langston University	Public	Langston	Logan	Associate, Bachelor, Master, Ph.D.
Langston University	Public	Oklahoma City	Oklahoma	Associate, Bachelor, Master, Ph.D.
Oklahoma City Community College	Public	Oklahoma City	Oklahoma	Associate, Certificate
Oklahoma State University	Public	Oklahoma City	Oklahoma	Bachelor, Master, Ph.D.
Oklahoma State University Oklahoma City	Public	Oklahoma City	Oklahoma	Associate, Certificate
Redlands Community College	Public	El Reno	Canadian	Associate
Rose State College	Public	Midwest City	Oklahoma	Associate
Seminole State College	Public	Seminole	Seminole	Certificate, Associate
University of Central Oklahoma	Public	Edmond	Oklahoma	Bachelor, Master, Ph.D., Graduate Certificate
University of Oklahoma	Public	Norman	Cleveland	Bachelor, Master, Ph.D., Graduate Certificate
University of Oklahoma Health Sciences Center	Public	Oklahoma City	Oklahoma	Residency
Central Oklahoma College	For Profit	Oklahoma City	Oklahoma	Certificate
Mid-America Christian University	Private Non-Profit	Oklahoma City	Oklahoma	Associate, Bachelor, Master, Certificate
Oklahoma Baptist University	Private Non-Profit	Shawnee	Pottawatomie	Bachelor, Master
Oklahoma Christian University	Private Non-Profit	Oklahoma City	Oklahoma	Bachelor, Master, Certificate
Oklahoma City University	Private Non-Profit	Oklahoma City	Oklahoma	Bachelor, Master, Ph.D., JD
Platt College	Private For Profit	Oklahoma City	Oklahoma	Certificates
Randall University	Private Non-Profit	Moore	Cleveland	Associate, Bachelor, Master
Southern Nazarene University	Private Non-Profit	Bethany	Oklahoma	Bachelor, Master, Ph.D.

Institution	Institution Type	City	County	Degree Types
Southwestern Christian University	Private Non-Profit	Bethany	Oklahoma	Bachelor, Master
University of Phoenix	Private For Profit	Oklahoma City	Oklahoma	Bachelor, Master
Eastern Oklahoma County	Technical School	Choctaw	Oklahoma	Certificate
Canadian Valley Technology Center	Technical School	El Reno	Canadian	Certificate
Canadian Valley Technology Center	Technical School	Yukon	Canadian	Certificate
Francis Tuttle	Technical School	3 Campuses in Oklahoma City	Oklahoma	Certificate
Gordon Cooper	Technical School	Shawnee	Pottawatomie	Certificate
Metro Tech	Technical School	4 Campuses in Oklahoma City	Oklahoma	Certificate
Mid-Del	Technical School	Midwest City	Oklahoma	Certificate
Moore Norman	Technical School	Norman	Cleveland	Certificate
Moore Norman	Technical School	Oklahoma City	Oklahoma	Certificate
Wes Watkins	Technical School	Wetumka	Hughes	Certificate

Source: Oklahoma State Regents of Higher Education, CareerTech.org

Top Growing Aerospace Occupations by 2026

SOC	Description	Employed in Industry Group (2021)	Employed in Industry Group (2026)	Change (2021 - 2026)	% Change (2021 - 2026)	% of Total Jobs in Industry Group (2021)	Median Hourly Earnings	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
15-1252	Software Developers	1,137	1,301	164	14%	4.3%	\$46.18	Bachelor's degree	None	None
49-3011	Aircraft Mechanics and Service Technicians	1,401	1,523	122	9%	5.3%	\$28.66	Postsecondary nondegree award	None	None
13-1081	Logisticians	361	441	80	22%	1.4%	\$37.45	Bachelor's degree	None	None
49-9041	Industrial Machinery Mechanics	201	273	72	36%	0.8%	\$24.70	High school diploma or equivalent	None	Long-term on-the-job training
51-4041	Machinists	444	515	71	16%	1.7%	\$23.13	High school diploma or equivalent	None	Long-term on-the-job training
17-2112	Industrial Engineers	228	292	64	28%	0.9%	\$42.50	Bachelor's degree	None	None
11-1021	General and Operations Managers	929	992	63	7%	3.5%	\$38.34	Bachelor's degree	5 years or more	None
17-2011	Aerospace Engineers	256	308	52	20%	1.0%	\$51.89	Bachelor's degree	None	None
13-1161	Market Research Analysts and Marketing Specialists	463	514	51	11%	1.7%	\$28.22	Bachelor's degree	None	None
13-1111	Management Analysts	462	511	49	11%	1.7%	\$38.30	Bachelor's degree	Less than 5 years	None

Source: Lightcast- economicmodeling.com- 2022.3

Top Growing Agribusiness & Bioscience Occupations by 2026

SOC	Description	Employed in Industry Group (2021)	Employed in Industry Group (2026)	Change (2021 - 2026)	% Change (2021 - 2026)	% of Total Jobs in Industry Group (2021)	Median Hourly Earnings	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
45-2092	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	552	821	269	49%	2.7%	\$12.37	No formal educational credential	None	Short-term on-the-job training
11-9013	Farmers, Ranchers, and Other Agricultural Managers	280	369	89	32%	1.4%	\$17.33	High school diploma or equivalent	5 years or more	None
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	776	832	55	7%	3.9%	\$14.48	No formal educational credential	None	Short-term on-the-job training
45-2093	Farmworkers, Farm, Ranch, and Aquacultural Animals	220	273	53	24%	1.1%	\$11.31	No formal educational credential	None	Short-term on-the-job training
45-2091	Agricultural Equipment Operators	135	187	52	38%	0.7%	\$13.16	No formal educational credential	None	Moderate-term on-the-job training
53-3032	Heavy and Tractor-Trailer Truck Drivers	525	573	48	9%	2.6%	\$23.47	Postsecondary nondegree award	None	Short-term on-the-job training
41-4012	Sales Representatives, Wholesale and Manufacturing, Except	585	633	48	8%	2.9%	\$23.56	High school diploma or equivalent	None	Moderate-term on-the-job training

SOC	Description	Employed in Industry Group (2021)	Employed in Industry Group (2026)	Change (2021 - 2026)	% Change (2021 - 2026)	% of Total Jobs in Industry Group (2021)	Median Hourly Earnings	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
	Technical and Scientific Products									
31-9096	Veterinary Assistants and Laboratory Animal Caretakers	579	617	38	7%	2.9%	\$13.95	High school diploma or equivalent	None	Short-term on-the-job training
51-3011	Bakers	229	267	38	17%	1.1%	\$13.69	No formal educational credential	None	Long-term on-the-job training
11-1021	General and Operations Managers	466	501	35	8%	2.3%	\$38.34	Bachelor's degree	5 years or more	None

Source: Lightcast- economicmodeling.com- 2022.3



SOC	Description	Employed in Industry Group (2021)	Employed in Industry Group (2026)	Change (2021 - 2026)	% Change (2021 - 2026)	% of Total Jobs in Industry Group (2021)	Median Hourly Earnings	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
49-9081	Wind Turbine Service Technicians	100	140	40	40%	0.5%	\$22.92	Postsecondary nondegree award	None	Long-term on-the-job training
49-9052	Telecommunications Line Installers and Repairers	59	68	9	16%	0.3%	\$23.67	High school diploma or equivalent	None	Long-term on-the-job training
53-7071	Gas Compressor and Gas Pumping Station Operators	17	22	4	23%	0.1%	\$34.76	High school diploma or equivalent	None	Moderate-term on-the-job training
49-2021	Radio, Cellular, and Tower Equipment Installers and Repairers	26	29	3	10%	0.1%	\$21.59	Associate's degree	None	Moderate-term on-the-job training
51-8091	Chemical Plant and System Operators	17	18	1	9%	0.1%	\$28.94	High school diploma or equivalent	None	Moderate-term on-the-job training
47-2221	Structural Iron and Steel Workers	30	31	1	4%	0.1%	\$22.99	High school diploma or equivalent	None	Apprenticeship
51-4023	Rolling Machine Setters, Operators, and Tenders, Metal and Plastic	26	26	0	0%	0.1%	\$14.61	High school diploma or equivalent	None	Moderate-term on-the-job training
51-4021	Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	23	22	-1	-2%	0.1%	\$20.76	High school diploma or equivalent	None	Moderate-term on-the-job training

SOC	Description	Employed in Industry Group (2021)	Employed in Industry Group (2026)	Change (2021 - 2026)	% Change (2021 - 2026)	% of Total Jobs in Industry Group (2021)	Median Hourly Earnings	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
19-2031	Chemists	13	12	-1	-4%	0.1%	\$31.12	Bachelor's degree	None	None
37-3013	Tree Trimmers and Pruners	16	15	-1	-4%	0.1%	\$18.39	High school diploma or equivalent	None	Short-term on-the-job training

Source: Lightcast- economicmodeling.com- 2022.3

Top Growing Information & Financial Services Occupations by 2026

SOC	Description	Employed in Industry Group (2021)	Employed in Industry Group (2026)	Change (2021 - 2026)	% Change (2021 - 2026)	% of Total Jobs in Industry Group (2021)	Median Hourly Earnings	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
13-2011	Accountants and Auditors	3,652	4,177	525	14%	7.6%	\$30.75	Bachelor's degree	None	None
11-3031	Financial Managers	1,424	1,596	172	12%	3.0%	\$54.25	Bachelor's degree	5 years or more	None
15-1252	Software Developers	1,690	1,837	147	9%	3.5%	\$46.18	Bachelor's degree	None	None
13-2082	Tax Preparers	498	603	105	21%	1.0%	\$17.98	High school diploma or equivalent	None	Moderate-term on-the-job training
43-3031	Bookkeeping, Accounting, and Auditing Clerks	2,013	2,108	96	5%	4.2%	\$18.38	Some college, no degree	None	Moderate-term on-the-job training
41-3031	Securities, Commodities, and Financial Services Sales Agents	1,140	1,194	55	5%	2.4%	\$23.54	Bachelor's degree	None	Moderate-term on-the-job training
13-1071	Human Resources Specialists	495	548	53	11%	1.0%	\$24.62	Bachelor's degree	None	None
13-1111	Management Analysts	571	623	52	9%	1.2%	\$38.30	Bachelor's degree	Less than 5 years	None
11-1021	General and Operations Managers	1,478	1,528	51	3%	3.1%	\$38.34	Bachelor's degree	5 years or more	None
13-1161	Market Research	701	745	44	6%	1.5%	\$28.22	Bachelor's degree	None	None

SOC	Description	Employed in Industry Group (2021)	Employed in Industry Group (2026)	Change (2021 - 2026)	% Change (2021 - 2026)	% of Total Jobs in Industry Group (2021)	Median Hourly Earnings	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
49-3011	Aircraft Mechanics and Service Technicians	487	569	82	17%	1.4%	\$28.66	Postsecondary nondegree award	None	None
17-2112	Industrial Engineers	417	490	72	17%	1.2%	\$42.50	Bachelor's degree	None	None
13-1081	Logisticians	320	378	59	18%	0.9%	\$37.45	Bachelor's degree	None	None
49-9041	Industrial Machinery Mechanics	372	427	55	15%	1.1%	\$24.70	High school diploma or equivalent	None	Long-term on-the-job training
17-2011	Aerospace Engineers	198	248	50	25%	0.6%	\$51.89	Bachelor's degree	None	None
15-1252	Software Developers	248	296	48	20%	0.7%	\$46.18	Bachelor's degree	None	None
51-4041	Machinists	926	967	41	4%	2.7%	\$23.13	High school diploma or equivalent	None	Long-term on-the-job training
51-1011	First-Line Supervisors of Production and Operating Workers	1,531	1,569	37	2%	4.4%	\$29.54	High school diploma or equivalent	Less than 5 years	None
51-3011	Bakers	218	255	37	17%	0.6%	\$13.69	No formal educational credential	None	Long-term on-the-job training
51-2011	Aircraft Structure, Surfaces,	105	139	34	32%	0.3%	\$22.91	High school diploma or equivalent	None	Moderate-term on-the-job training

SOC	Description	Employed in Industry Group (2021)	Employed in Industry Group (2026)	Change (2021 - 2026)	% Change (2021 - 2026)	% of Total Jobs in Industry Group (2021)	Median Hourly Earnings	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
	Analysts and Marketing Specialists									

Source: Lightcast- economicmodeling.com- 2022.3

Top Growing Manufacturing Operations by 2026

SOC	Description	Employed in Industry Group (2021)	Employed in Industry Group (2026)	Change (2021 - 2026)	% Change (2021 - 2026)	% of Total Jobs in Industry Group (2021)	Median Hourly Earnings	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
	Rigging, and Systems Assemblers									

Source: Lightcast- economicmodeling.com- 2022.3

Top Growing Transportation and

SOC	Description	Employed in Industry Group (2021)	Employed in Industry Group (2026)	Change (2021 - 2026)	% Change (2021 - 2026)	% of Total Jobs in Industry Group (2021)	Median Hourly Earnings	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
53-7065	Stockers and Order Fillers	4,345	5,076	730	17%	8.9%	\$14.29	High school diploma or equivalent	None	Short-term on-the-job training
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	4,642	5,329	687	15%	9.5%	\$14.48	No formal educational credential	None	Short-term on-the-job training
53-7051	Industrial Truck and Tractor Operators	2,485	3,131	646	26%	5.1%	\$18.93	No formal educational credential	None	Short-term on-the-job training
53-1047	First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	1,150	1,272	122	11%	2.4%	\$28.49	High school diploma or equivalent	Less than 5 years	None
53-7064	Packers and Packagers, Hand	232	338	106	46%	0.5%	\$13.99	No formal educational credential	None	Short-term on-the-job training
53-3032	Heavy and Tractor-Trailer Truck Drivers	5,767	5,854	87	2%	11.8%	\$23.47	Postsecondary nondegree award	None	Short-term on-the-job training
49-9071	Maintenance and Repair Workers, General	476	552	76	16%	1.0%	\$17.44	High school diploma or equivalent	None	Moderate-term on-the-job training

SOC	Description	Employed in Industry Group (2021)	Employed in Industry Group (2026)	Change (2021 - 2026)	% Change (2021 - 2026)	% of Total Jobs in Industry Group (2021)	Median Hourly Earnings	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
43-5071	Shipping, Receiving, and Inventory Clerks	1,407	1,480	73	5%	2.9%	\$14.79	High school diploma or equivalent	None	Short-term on-the-job training
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	2,438	2,509	71	3%	5.0%	\$23.56	High school diploma or equivalent	None	Moderate-term on-the-job training
13-1081	Logisticians	317	377	60	19%	0.6%	\$37.45	Bachelor's degree	None	None

Source: Lightcast- economicmodeling.com- 2022.3

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APPENDIX V

Target and Complementary NAICS Codes

Aerospace and Defense Industries

NAICS	Industry Description
32521	Resin and Synthetic Rubber Manufacturing
32551	Paint and Coating Manufacturing
32592	Explosives Manufacturing
32629	Other Rubber Product Manufacturing
33231	Plate Work and Fabricated Structural Product Manufacturing
33271	Machine Shops
33281	Coating, Engraving, Heat Treating, and Allied Activities
33299	All Other Fabricated Metal Product Manufacturing
33351	Metalworking Machinery Manufacturing
33361	Engine, Turbine, and Power Transmission Equipment Manufacturing
33411	Computer and Peripheral Equipment Manufacturing
33441	Semiconductor and Other Electronic Component Manufacturing
33451	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
33531	Electrical Equipment Manufacturing
33599	All Other Electrical Equipment and Component Manufacturing
33641	Aerospace Product and Parts Manufacturing
42386	Transportation Equipment and Supplies (except Motor Vehicle) Merchant Wholesalers
48111	Scheduled Air Transportation
48121	Nonscheduled Air Transportation
48811	Airport Operations
48819	Other Support Activities for Air Transportation
54133	Engineering Services
54138	Testing Laboratories
54151	Computer Systems Design and Related Services
54161	Management Consulting Services
54169	Other Scientific and Technical Consulting Services
54171	Research and Development in the Physical, Engineering, and Life Sciences
61151	Technical and Trade Schools
	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic)
81131	Repair and Maintenance
90120	Federal Government, Military

Energy Industries

NAICS	Industry Description
21112	Crude Petroleum Extraction
21113	Natural Gas Extraction
21211	Coal Mining
21311	Support Activities for Mining
22111	Electric Power Generation
22112	Electric Power Transmission, Control, and Distribution



NAICS	Industry Description
22121	Natural Gas Distribution
23712	Oil and Gas Pipeline and Related Structures Construction
23713	Power and Communication Line and Related Structures Construction
32411	Petroleum Refineries
32412	Asphalt Paving, Roofing, and Saturated Materials Manufacturing
32419	Other Petroleum and Coal Products Manufacturing
32511	Petrochemical Manufacturing
32512	Industrial Gas Manufacturing
33121	Iron and Steel Pipe and Tube Manufacturing from Purchased Steel
33241	Power Boiler and Heat Exchanger Manufacturing
33242	Metal Tank (Heavy Gauge) Manufacturing
33291	Metal Valve Manufacturing
33313	Mining and Oil and Gas Field Machinery Manufacturing
33341	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing
33361	Engine, Turbine, and Power Transmission Equipment Manufacturing
33391	Pump and Compressor Manufacturing
33531	Electrical Equipment Manufacturing
33591	Battery Manufacturing
42352	Coal and Other Mineral and Ore Merchant Wholesalers
42471	Petroleum Bulk Stations and Terminals
42472	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)
48611	Pipeline Transportation of Crude Oil
48621	Pipeline Transportation of Natural Gas
48691	Pipeline Transportation of Refined Petroleum Products
48699	All Other Pipeline Transportation
54136	Geophysical Surveying and Mapping Services
54138	Testing Laboratories

Agribusiness and Biosciences Industries

NAICS	Industry Description
11100	Crop Production
11200	Animal Production
11311	Timber Tract Operations
11321	Forest Nurseries and Gathering of Forest Products
11331	Logging
11411	Fishing
11421	Hunting and Trapping
11511	Support Activities for Crop Production
11521	Support Activities for Animal Production
11531	Support Activities for Forestry
31111	Animal Food Manufacturing



NAICS	Industry Description
31121	Flour Milling and Malt Manufacturing
31122	Starch and Vegetable Fats and Oils Manufacturing
31123	Breakfast Cereal Manufacturing
31131	Sugar Manufacturing
31134	Nonchocolate Confectionery Manufacturing
31135	Chocolate and Confectionery Manufacturing
31141	Frozen Food Manufacturing
31142	Fruit and Vegetable Canning, Pickling, and Drying
31151	Dairy Product (except Frozen) Manufacturing
31152	Ice Cream and Frozen Dessert Manufacturing
31161	Animal Slaughtering and Processing
31171	Seafood Product Preparation and Packaging
31181	Bread and Bakery Product Manufacturing
31182	Cookie, Cracker, and Pasta Manufacturing
31183	Tortilla Manufacturing
31191	Snack Food Manufacturing
31192	Coffee and Tea Manufacturing
31193	Flavoring Syrup and Concentrate Manufacturing
31194	Seasoning and Dressing Manufacturing
31199	All Other Food Manufacturing
31211	Soft Drink and Ice Manufacturing
31212	Breweries
31213	Wineries
31214	Distilleries
32111	Sawmills and Wood Preservation
32121	Veneer, Plywood, and Engineered Wood Product Manufacturing
32191	Millwork
32192	Wood Container and Pallet Manufacturing
32199	All Other Wood Product Manufacturing
32211	Pulp Mills
32212	Paper Mills
32213	Paperboard Mills
32221	Paperboard Container Manufacturing
32222	Paper Bag and Coated and Treated Paper Manufacturing
32512	Industrial Gas Manufacturing
32519	Other Basic Organic Chemical Manufacturing
32522	Artificial and Synthetic Fibers and Filaments Manufacturing
32531	Fertilizer Manufacturing
32532	Pesticide and Other Agricultural Chemical Manufacturing
32541	Pharmaceutical and Medicine Manufacturing
33311	Agricultural Implement Manufacturing
33451	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
33461	Manufacturing and Reproducing Magnetic and Optical Media



NAICS	Industry Description
33911	Medical Equipment and Supplies Manufacturing
42345	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers
42346	Ophthalmic Goods Merchant Wholesalers
42382	Farm and Garden Machinery and Equipment Merchant Wholesalers
42421	Drugs and Druggists' Sundries Merchant Wholesalers
42443	Dairy Product (except Dried or Canned) Merchant Wholesalers
42444	Poultry and Poultry Product Merchant Wholesalers
42445	Confectionery Merchant Wholesalers
42446	Fish and Seafood Merchant Wholesalers
42447	Meat and Meat Product Merchant Wholesalers
42448	Fresh Fruit and Vegetable Merchant Wholesalers
42449	Other Grocery and Related Products Merchant Wholesalers
42451	Grain and Field Bean Merchant Wholesalers
42452	Livestock Merchant Wholesalers
42459	Other Farm Product Raw Material Merchant Wholesalers
42481	Beer and Ale Merchant Wholesalers
42482	Wine and Distilled Alcoholic Beverage Merchant Wholesalers
42491	Farm Supplies Merchant Wholesalers
49313	Farm Product Warehousing and Storage
54133	Engineering Services
54138	Testing Laboratories
54162	Environmental Consulting Services
54171	Research and Development in the Physical, Engineering, and Life Sciences
54194	Veterinary Services
54199	All Other Professional, Scientific, and Technical Services
62151	Medical and Diagnostic Laboratories

Informational and Financial Services Industries

NAICS	Industry Description
33411	Computer and Peripheral Equipment Manufacturing
51121	Software Publishers
51731	Wired and Wireless Telecommunications Carriers
51741	Satellite Telecommunications
51791	Other Telecommunications
51821	Data Processing, Hosting, and Related Services
51913	Internet Publishing and Broadcasting and Web Search Portals
51919	All Other Information Services
52111	Monetary Authorities-Central Bank
52211	Commercial Banking
52212	Savings Institutions
52213	Credit Unions
52219	Other Depository Credit Intermediation
52221	Credit Card Issuing

NAICS	Industry Description
52222	Sales Financing
52229	Other Nondepository Credit Intermediation
52231	Mortgage and Nonmortgage Loan Brokers
52232	Financial Transactions Processing, Reserve, and Clearinghouse Activities
52239	Other Activities Related to Credit Intermediation
52311	Investment Banking and Securities Dealing
52312	Securities Brokerage
52313	Commodity Contracts Dealing
52314	Commodity Contracts Brokerage
52321	Securities and Commodity Exchanges
52391	Miscellaneous Intermediation
52392	Portfolio Management
52393	Investment Advice
52399	All Other Financial Investment Activities
52411	Direct Life, Health, and Medical Insurance Carriers
52412	Direct Insurance (except Life, Health, and Medical) Carriers
52413	Reinsurance Carriers
52429	Other Insurance Related Activities
52511	Pension Funds
52512	Health and Welfare Funds
52519	Other Insurance Funds
52591	Open-End Investment Funds
52592	Trusts, Estates, and Agency Accounts
52599	Other Financial Vehicles
54121	Accounting, Tax Preparation, Bookkeeping, and Payroll Services
54151	Computer Systems Design and Related Services
55111	Management of Companies and Enterprises

Transportation and Logistics Industries

NAICS	Industry Description
32621	Tire Manufacturing
33361	Engine, Turbine, and Power Transmission Equipment Manufacturing
33451	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
33611	Automobile and Light Duty Motor Vehicle Manufacturing
33612	Heavy Duty Truck Manufacturing
33621	Motor Vehicle Body and Trailer Manufacturing
33631	Motor Vehicle Gasoline Engine and Engine Parts Manufacturing
33632	Motor Vehicle Electrical and Electronic Equipment Manufacturing
33633	Motor Vehicle Steering and Suspension Components (except Spring) Manufacturing
33634	Motor Vehicle Brake System Manufacturing
33635	Motor Vehicle Transmission and Power Train Parts Manufacturing
33636	Motor Vehicle Seating and Interior Trim Manufacturing
33637	Motor Vehicle Metal Stamping

NAICS	Industry Description
33639	Other Motor Vehicle Parts Manufacturing
33651	Railroad Rolling Stock Manufacturing
33661	Ship and Boat Building
33699	Other Transportation Equipment Manufacturing
42311	Automobile and Other Motor Vehicle Merchant Wholesalers
42312	Motor Vehicle Supplies and New Parts Merchant Wholesalers
42313	Tire and Tube Merchant Wholesalers
42314	Motor Vehicle Parts (Used) Merchant Wholesalers
42321	Furniture Merchant Wholesalers
42322	Home Furnishing Merchant Wholesalers
42331	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers
42332	Brick, Stone, and Related Construction Material Merchant Wholesalers
42333	Roofing, Siding, and Insulation Material Merchant Wholesalers
42339	Other Construction Material Merchant Wholesalers
42341	Photographic Equipment and Supplies Merchant Wholesalers
42342	Office Equipment Merchant Wholesalers
42343	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers
42344	Other Commercial Equipment Merchant Wholesalers
42345	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers
42346	Ophthalmic Goods Merchant Wholesalers
42349	Other Professional Equipment and Supplies Merchant Wholesalers
42351	Metal Service Centers and Other Metal Merchant Wholesalers
42352	Coal and Other Mineral and Ore Merchant Wholesalers
42361	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers
42362	Household Appliances, Electric Housewares, and Consumer Electronics Merchant Wholesalers
42369	Other Electronic Parts and Equipment Merchant Wholesalers
42371	Hardware Merchant Wholesalers
42372	Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers
42373	Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers
42374	Refrigeration Equipment and Supplies Merchant Wholesalers
42381	Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers
42382	Farm and Garden Machinery and Equipment Merchant Wholesalers
42383	Industrial Machinery and Equipment Merchant Wholesalers
42384	Industrial Supplies Merchant Wholesalers
42385	Service Establishment Equipment and Supplies Merchant Wholesalers
42386	Transportation Equipment and Supplies (except Motor Vehicle) Merchant Wholesalers
42391	Sporting and Recreational Goods and Supplies Merchant Wholesalers
42392	Toy and Hobby Goods and Supplies Merchant Wholesalers
42393	Recyclable Material Merchant Wholesalers
42394	Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers
42399	Other Miscellaneous Durable Goods Merchant Wholesalers



NAICS	Industry Description
42411	Printing and Writing Paper Merchant Wholesalers
42412	Stationery and Office Supplies Merchant Wholesalers
42413	Industrial and Personal Service Paper Merchant Wholesalers
42421	Drugs and Druggists' Sundries Merchant Wholesalers
42431	Piece Goods, Notions, and Other Dry Goods Merchant Wholesalers
42432	Men's and Boys' Clothing and Furnishings Merchant Wholesalers
42433	Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers
42434	Footwear Merchant Wholesalers
42441	General Line Grocery Merchant Wholesalers
42442	Packaged Frozen Food Merchant Wholesalers
42443	Dairy Product (except Dried or Canned) Merchant Wholesalers
42444	Poultry and Poultry Product Merchant Wholesalers
42445	Confectionery Merchant Wholesalers
42446	Fish and Seafood Merchant Wholesalers
42447	Meat and Meat Product Merchant Wholesalers
42448	Fresh Fruit and Vegetable Merchant Wholesalers
42449	Other Grocery and Related Products Merchant Wholesalers
42451	Grain and Field Bean Merchant Wholesalers
42452	Livestock Merchant Wholesalers
42459	Other Farm Product Raw Material Merchant Wholesalers
42461	Plastics Materials and Basic Forms and Shapes Merchant Wholesalers
42469	Other Chemical and Allied Products Merchant Wholesalers
42471	Petroleum Bulk Stations and Terminals
42472	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)
42481	Beer and Ale Merchant Wholesalers
42482	Wine and Distilled Alcoholic Beverage Merchant Wholesalers
42491	Farm Supplies Merchant Wholesalers
42492	Book, Periodical, and Newspaper Merchant Wholesalers
42493	Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers
42494	Tobacco and Tobacco Product Merchant Wholesalers
42495	Paint, Varnish, and Supplies Merchant Wholesalers
42499	Other Miscellaneous Nondurable Goods Merchant Wholesalers
42511	Business to Business Electronic Markets
42512	Wholesale Trade Agents and Brokers
48111	Scheduled Air Transportation
48121	Nonscheduled Air Transportation
48211	Rail Transportation
48321	Inland Water Transportation
48411	General Freight Trucking, Local
48412	General Freight Trucking, Long-Distance
48422	Specialized Freight (except Used Goods) Trucking, Local
48423	Specialized Freight (except Used Goods) Trucking, Long-Distance



NAICS	Industry Description
48611	Pipeline Transportation of Crude Oil
48621	Pipeline Transportation of Natural Gas
48691	Pipeline Transportation of Refined Petroleum Products
48699	All Other Pipeline Transportation
48811	Airport Operations
48819	Other Support Activities for Air Transportation
48821	Support Activities for Rail Transportation
48839	Other Support Activities for Water Transportation
48841	Motor Vehicle Towing
48849	Other Support Activities for Road Transportation
48851	Freight Transportation Arrangement
48899	Other Support Activities for Transportation
49311	General Warehousing and Storage
49312	Refrigerated Warehousing and Storage
49313	Farm Product Warehousing and Storage
49319	Other Warehousing and Storage

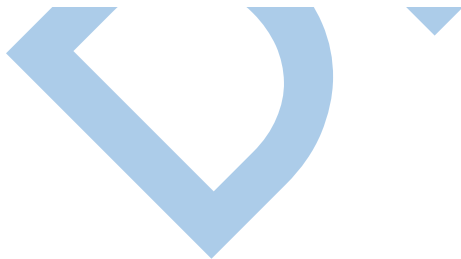
Automotive Industries

NAICS	Industry Description
33611	Automobile and Light Duty Motor Vehicle Manufacturing

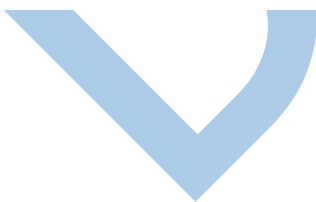
Manufacturing Industries

NAICS	Industry Description
31111	Animal Food Manufacturing
31121	Flour Milling and Malt Manufacturing
31122	Starch and Vegetable Fats and Oils Manufacturing
31123	Breakfast Cereal Manufacturing
31131	Sugar Manufacturing
31134	Nonchocolate Confectionery Manufacturing
31135	Chocolate and Confectionery Manufacturing
31141	Frozen Food Manufacturing
31142	Fruit and Vegetable Canning, Pickling, and Drying
31151	Dairy Product (except Frozen) Manufacturing
31152	Ice Cream and Frozen Dessert Manufacturing
31161	Animal Slaughtering and Processing
31171	Seafood Product Preparation and Packaging
31181	Bread and Bakery Product Manufacturing
31182	Cookie, Cracker, and Pasta Manufacturing
31183	Tortilla Manufacturing
31191	Snack Food Manufacturing
31192	Coffee and Tea Manufacturing
31193	Flavoring Syrup and Concentrate Manufacturing
31194	Seasoning and Dressing Manufacturing

NAICS	Industry Description
32419	Other Petroleum and Coal Products Manufacturing
32511	Petrochemical Manufacturing
32512	Industrial Gas Manufacturing
32513	Synthetic Dye and Pigment Manufacturing
32518	Other Basic Inorganic Chemical Manufacturing
32519	Other Basic Organic Chemical Manufacturing
32521	Resin and Synthetic Rubber Manufacturing
32522	Artificial and Synthetic Fibers and Filaments Manufacturing
32531	Fertilizer Manufacturing
32532	Pesticide and Other Agricultural Chemical Manufacturing
32541	Pharmaceutical and Medicine Manufacturing
32551	Paint and Coating Manufacturing
32552	Adhesive Manufacturing
32561	Soap and Cleaning Compound Manufacturing
32562	Toilet Preparation Manufacturing
32591	Printing Ink Manufacturing
32592	Explosives Manufacturing
32599	All Other Chemical Product and Preparation Manufacturing
32611	Plastics Packaging Materials and Unlaminated Film and Sheet Manufacturing
32612	Plastics Pipe, Pipe Fitting, and Unlaminated Profile Shape Manufacturing
32613	Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing
32614	Polystyrene Foam Product Manufacturing
32615	Urethane and Other Foam Product (except Polystyrene) Manufacturing
32616	Plastics Bottle Manufacturing
32619	Other Plastics Product Manufacturing
32621	Tire Manufacturing
32622	Rubber and Plastics Hoses and Belting Manufacturing
32629	Other Rubber Product Manufacturing
32711	Pottery, Ceramics, and Plumbing Fixture Manufacturing
32712	Clay Building Material and Refractories Manufacturing
32721	Glass and Glass Product Manufacturing
32731	Cement Manufacturing
32732	Ready-Mix Concrete Manufacturing
32733	Concrete Pipe, Brick, and Block Manufacturing
32739	Other Concrete Product Manufacturing
32741	Lime Manufacturing
32742	Gypsum Product Manufacturing
32791	Abrasive Product Manufacturing
32799	All Other Nonmetallic Mineral Product Manufacturing
33111	Iron and Steel Mills and Ferroalloy Manufacturing
33121	Iron and Steel Pipe and Tube Manufacturing from Purchased Steel
33122	Rolling and Drawing of Purchased Steel
33131	Alumina and Aluminum Production and Processing



NAICS	Industry Description
31199	All Other Food Manufacturing
31211	Soft Drink and Ice Manufacturing
31212	Breweries
31213	Wineries
31214	Distilleries
31223	Tobacco Manufacturing
31311	Fiber, Yarn, and Thread Mills
31321	Broadwoven Fabric Mills
31322	Narrow Fabric Mills and Schiffli Machine Embroidery
31323	Nonwoven Fabric Mills
31324	Knit Fabric Mills
31331	Textile and Fabric Finishing Mills
31332	Fabric Coating Mills
31411	Carpet and Rug Mills
31412	Curtain and Linen Mills
31491	Textile Bag and Canvas Mills
31499	All Other Textile Product Mills
31511	Hosiery and Sock Mills
31519	Other Apparel Knitting Mills
31521	Cut and Sew Apparel Contractors
31522	Men's and Boys' Cut and Sew Apparel Manufacturing
31524	Women's, Girls', and Infants' Cut and Sew Apparel Manufacturing
31528	Other Cut and Sew Apparel Manufacturing
31599	Apparel Accessories and Other Apparel Manufacturing
31611	Leather and Hide Tanning and Finishing
31621	Footwear Manufacturing
31699	Other Leather and Allied Product Manufacturing
32111	Sawmills and Wood Preservation
32121	Veneer, Plywood, and Engineered Wood Product Manufacturing
32191	Millwork
32192	Wood Container and Pallet Manufacturing
32199	All Other Wood Product Manufacturing
32211	Pulp Mills
32212	Paper Mills
32213	Paperboard Mills
32221	Paperboard Container Manufacturing
32222	Paper Bag and Coated and Treated Paper Manufacturing
32223	Stationery Product Manufacturing
32229	Other Converted Paper Product Manufacturing
32311	Printing
32312	Support Activities for Printing
32411	Petroleum Refineries
32412	Asphalt Paving, Roofing, and Saturated Materials Manufacturing



NAICS	Industry Description
33141	Nonferrous Metal (except Aluminum) Smelting and Refining
33142	Copper Rolling, Drawing, Extruding, and Alloying
33149	Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, Extruding, and Alloying
33151	Ferrous Metal Foundries
33152	Nonferrous Metal Foundries
33211	Forging and Stamping
33221	Cutlery and Handtool Manufacturing
33231	Plate Work and Fabricated Structural Product Manufacturing
33232	Ornamental and Architectural Metal Products Manufacturing
33241	Power Boiler and Heat Exchanger Manufacturing
33242	Metal Tank (Heavy Gauge) Manufacturing
33243	Metal Can, Box, and Other Metal Container (Light Gauge) Manufacturing
33251	Hardware Manufacturing
33261	Spring and Wire Product Manufacturing
33271	Machine Shops
33272	Turned Product and Screw, Nut, and Bolt Manufacturing
33281	Coating, Engraving, Heat Treating, and Allied Activities
33291	Metal Valve Manufacturing
33299	All Other Fabricated Metal Product Manufacturing
33311	Agricultural Implement Manufacturing
33312	Construction Machinery Manufacturing
33313	Mining and Oil and Gas Field Machinery Manufacturing
33324	Industrial Machinery Manufacturing
33331	Commercial and Service Industry Machinery Manufacturing
	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment
33341	Manufacturing
33351	Metalworking Machinery Manufacturing
33361	Engine, Turbine, and Power Transmission Equipment Manufacturing
33391	Pump and Compressor Manufacturing
33392	Material Handling Equipment Manufacturing
33399	All Other General Purpose Machinery Manufacturing
33411	Computer and Peripheral Equipment Manufacturing
33421	Telephone Apparatus Manufacturing
33422	Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing
33429	Other Communications Equipment Manufacturing
33431	Audio and Video Equipment Manufacturing
33441	Semiconductor and Other Electronic Component Manufacturing
33451	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
33461	Manufacturing and Reproducing Magnetic and Optical Media
33511	Electric Lamp Bulb and Part Manufacturing
33512	Lighting Fixture Manufacturing
33521	Small Electrical Appliance Manufacturing
33522	Major Household Appliance Manufacturing

NAICS	Industry Description
33531	Electrical Equipment Manufacturing
33591	Battery Manufacturing
33592	Communication and Energy Wire and Cable Manufacturing
33593	Wiring Device Manufacturing
33599	All Other Electrical Equipment and Component Manufacturing
33611	Automobile and Light Duty Motor Vehicle Manufacturing
33612	Heavy Duty Truck Manufacturing
33621	Motor Vehicle Body and Trailer Manufacturing
33631	Motor Vehicle Gasoline Engine and Engine Parts Manufacturing
33632	Motor Vehicle Electrical and Electronic Equipment Manufacturing
33633	Motor Vehicle Steering and Suspension Components (except Spring) Manufacturing
33634	Motor Vehicle Brake System Manufacturing
33635	Motor Vehicle Transmission and Power Train Parts Manufacturing
33636	Motor Vehicle Seating and Interior Trim Manufacturing
33637	Motor Vehicle Metal Stamping
33639	Other Motor Vehicle Parts Manufacturing
33641	Aerospace Product and Parts Manufacturing
33651	Railroad Rolling Stock Manufacturing
33661	Ship and Boat Building
33699	Other Transportation Equipment Manufacturing
33711	Wood Kitchen Cabinet and Countertop Manufacturing
33712	Household and Institutional Furniture Manufacturing
33721	Office Furniture (including Fixtures) Manufacturing
33791	Mattress Manufacturing
33792	Blind and Shade Manufacturing
33911	Medical Equipment and Supplies Manufacturing
33991	Jewelry and Silverware Manufacturing
33992	Sporting and Athletic Goods Manufacturing
33993	Doll, Toy, and Game Manufacturing
33994	Office Supplies (except Paper) Manufacturing
33995	Sign Manufacturing
33999	All Other Miscellaneous Manufacturing

Construction Industries

NAICS	Industry Description
23611	Residential Building Construction
23621	Industrial Building Construction
23622	Commercial and Institutional Building Construction
23711	Water and Sewer Line and Related Structures Construction
23712	Oil and Gas Pipeline and Related Structures Construction
23713	Power and Communication Line and Related Structures Construction
23721	Land Subdivision
23731	Highway, Street, and Bridge Construction

NAICS	Industry Description
23799	Other Heavy and Civil Engineering Construction
23811	Poured Concrete Foundation and Structure Contractors
23812	Structural Steel and Precast Concrete Contractors
23813	Framing Contractors
23814	Masonry Contractors
23815	Glass and Glazing Contractors
23816	Roofing Contractors
23817	Siding Contractors
23819	Other Foundation, Structure, and Building Exterior Contractors
23821	Electrical Contractors and Other Wiring Installation Contractors
23822	Plumbing, Heating, and Air-Conditioning Contractors
23829	Other Building Equipment Contractors
23831	Drywall and Insulation Contractors
23832	Painting and Wall Covering Contractors
23833	Flooring Contractors
23834	Tile and Terrazzo Contractors
23835	Finish Carpentry Contractors
23839	Other Building Finishing Contractors
23891	Site Preparation Contractors
23899	All Other Specialty Trade Contractors

Healthcare Industries

NAICS	Industry Description
62111	Offices of Physicians
62121	Offices of Dentists
62131	Offices of Chiropractors
62132	Offices of Optometrists
62133	Offices of Mental Health Practitioners (except Physicians)
62134	Offices of Physical, Occupational and Speech Therapists, and Audiologists
62139	Offices of All Other Health Practitioners
62141	Family Planning Centers
62142	Outpatient Mental Health and Substance Abuse Centers
62149	Other Outpatient Care Centers
62151	Medical and Diagnostic Laboratories
62161	Home Health Care Services
62191	Ambulance Services
62199	All Other Ambulatory Health Care Services
62211	General Medical and Surgical Hospitals
62221	Psychiatric and Substance Abuse Hospitals
62231	Specialty (except Psychiatric and Substance Abuse) Hospitals
62311	Nursing Care Facilities (Skilled Nursing Facilities)
62321	Residential Intellectual and Developmental Disability Facilities
62322	Residential Mental Health and Substance Abuse Facilities

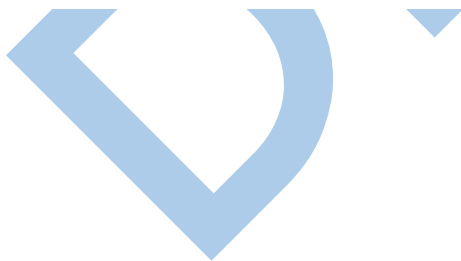
NAICS	Industry Description
62331	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly
62399	Other Residential Care Facilities
62411	Child and Youth Services
62412	Services for the Elderly and Persons with Disabilities
62419	Other Individual and Family Services
62421	Community Food Services
62422	Community Housing Services
62423	Emergency and Other Relief Services
62431	Vocational Rehabilitation Services
62441	Child Day Care Services

Education Industries

NAICS	Industry Description
61111	Elementary and Secondary Schools
61121	Junior Colleges
61131	Colleges, Universities, and Professional Schools
61141	Business and Secretarial Schools
61142	Computer Training
61143	Professional and Management Development Training
61151	Technical and Trade Schools
61161	Fine Arts Schools
61162	Sports and Recreation Instruction
61163	Language Schools
61169	All Other Schools and Instruction
61171	Educational Support Services

Creative Industries

NAICS	Industry Description
23622	Commercial and Institutional Building Construction
51211	Motion Picture and Video Production
51212	Motion Picture and Video Distribution
51213	Motion Picture and Video Exhibition
51219	Postproduction Services and Other Motion Picture and Video Industries
51223	Music Publishers
51224	Sound Recording Studios
51225	Record Production and Distribution
51229	Other Sound Recording Industries
54131	Architectural Services
54132	Landscape Architectural Services
54133	Engineering Services
54134	Drafting Services
54141	Interior Design Services
54142	Industrial Design Services



NAICS	Industry Description
54143	Graphic Design Services
54149	Other Specialized Design Services
54181	Advertising Agencies
54182	Public Relations Agencies
54183	Media Buying Agencies
54184	Media Representatives
54185	Outdoor Advertising
54186	Direct Mail Advertising
54187	Advertising Material Distribution Services
54189	Other Services Related to Advertising
54192	Photographic Services
71111	Theater Companies and Dinner Theaters
71112	Dance Companies
71113	Musical Groups and Artists
71119	Other Performing Arts Companies
71131	Promoters of Performing Arts, Sports, and Similar Events with Facilities
71132	Promoters of Performing Arts, Sports, and Similar Events without Facilities
71141	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures
71151	Independent Artists, Writers, and Performers
71211	Museums
71212	Historical Sites

