Date: March 28, 2020

To: Members of the Economic Development Commission, Tulsa Development Authority, Tulsa Industrial Authority, Tulsa Parking Authority, and Tulsa Public Facilities Authority

From: Kian Kamas, Chief of Economic Development, City of Tulsa

Subject: April Update RE: Community and Economic Development Strategic Planning

Current Status
On Wednesday, March 25th, Mayor Bynum signed the agreement with HR&A for consulting services for the strategic planning effort. Prior to this signing, the staff working committee responsible for assisting in guiding this effort began coordinating the collection of key background information and documentation for each of the entities under study. The initial round of document collection has been completed, which has allowed HR&A staff to begin the research phase of the project and submit a round of initial questions for follow-up documentation needed.

At this stage, the most critical question for the project will be when and how to begin engagement efforts related to the project. HR&A has provided a draft engagement schedule proposal, which we will be reviewing the last week of March/first week of April to make determinations as to how to proceed. We believe there are elements of outreach that can be conducted virtually, but others which are best suited to be undertaken in person. Our goal will be to maximize the research portion of this project in the coming weeks so that we maximize the realities of our current situation.

We expect to have further guidance regarding the strategy for managing the project in the light of the COVID-19 crisis and response, and will report on up-to-date status at each entity’s Regular Meeting in April. In the meantime, I have attached a copy of the document request submitted by HR&A so that you can understand the information HR&A will be reviewing.
MEMORANDUM

To: City of Tulsa
From: HR&A Advisors, Inc.
Date: March 6, 2020
Re: Draft Document Request

To facilitate the data collection process, we have identified specific plans and documents to which we already have access, separate from the data that we hope the City of Tulsa can help us to obtain. Please treat this data request as a “wish list,” as we are interested in mining your existing data but not in asking City staff to produce new data that does not exist. Please transmit the documents as they become available.

**Key Plans & Reports Collected to Date**

<table>
<thead>
<tr>
<th>Report or Plan Title</th>
<th>Year</th>
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<tbody>
<tr>
<td>Economic Benchmarks: Tulsa’s Competitive Challenge</td>
<td>2016</td>
</tr>
<tr>
<td>Resilient Tulsa Strategy</td>
<td>2018</td>
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<tr>
<td>Tulsa Economic Profile</td>
<td>2019</td>
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<td>Tulsa Equity Indicators Report</td>
<td>2018</td>
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<tr>
<td>Tulsa’s Future</td>
<td>2009-2018</td>
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<tr>
<td>INCOG-EDD Econ Development Plan</td>
<td>2013</td>
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<tr>
<td>Tulsa Retail Market Study and Strategy</td>
<td>2019</td>
</tr>
<tr>
<td>City of Tulsa Budget</td>
<td>2019-2020</td>
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</tbody>
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**Requested Additional Information**

*Note: For any quantitative data, we would prefer for that data to be in an Excel document, if possible.*

- **Tulsa’s Economic Trajectory**
  - Any additional studies, plans, or initiatives that offer insight into Tulsa’s economy and/or its socioeconomic disparities. These could include documents produced by external partners, such as the chamber or local foundations.

- **The City’s Economic Development Operations**
  - Authorizing documents for each economic development entity under review
  - Summary of partner organizations and partnership agreements, including MOU language or other contractual agreement regarding long-term relationships.
  - Organizational charts and FTE counts
  - Detailed department/authority budgets (actual and adopted) for the last 5 years.
    - Revenue data should differentiate between General Fund allocations, fees for service, grants (identified by one-time vs. re-occurring), and other funding sources.

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1 These entities include: the Mayor’s Office of Community Development and Policy, the Mayor’s Office of Economic Development, the Economic Development Commission, the Tulsa Development Authority, the Tulsa Parking Authority, and the Tulsa Public Facilities Authority.
Expenditures should differentiate between labor, materials, and pass-through funds.

- Any program evaluations, project monitoring reports, or annual performance reports.
- Performance metrics collected by these entities
- Details on the policy and programmatic tools that these entities currently deploy. These can include information handouts, summaries of investments, application evaluation guidelines, and any other documents that can help us understand how Tulsa is currently using its economic development tools. We suggest that such tools will include:
  - Business Incentives
  - Redevelopment Activities
  - Small Business Support
  - Parking Policies
  - Innovation Districts
  - Opportunity Zones
- List of major capital investments undertaken in the last 15 years, including location, total city contribution, and total project cost if investment was a public-private venture.
- Data on vacant or surplus publicly-owned properties, including location, zoning, and assessed value