

TULSA'S ECONOMIC DEVELOPMENT FRAMEWORK

*Providing an Organizational Structure and Strategy for
the City and its Authorities, Boards, and Commissions*

December 2020

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PROJECT TEAM ACKNOWLEDGMENTS

CITY OF TULSA, MAYOR'S OFFICE OF ECONOMIC DEVELOPMENT (MOED)

MOED works to strengthen the economy and create shared prosperity for all Tulsans by developing and managing resources which spur business creation and expansion and facilitate new development and investment. MOED oversees operations of the Downtown Coordinating Council, leverages the Stadium Improvement District to successfully maintain, improve, market and develop Downtown Tulsa as a vibrant center for living, commerce, arts, entertainment and education, manages the Brownfields Program grant funds to assist in redevelopment of brownfield sites, retail marketing, impact analysis for economic development incentive applications, and staffs the Economic Development Commission.

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HR&A ADVISORS, INC.

HR&A Advisors, Inc. (HR&A) is an industry-leading consulting firm providing services in real estate, economic development, and public policy. HR&A provides strategic advisory services for some of the most complex mixed-use, neighborhood, downtown, campus, and regional development projects across North America and abroad. HR&A understands the importance of linking accretive private investment with public resources to support investors and communities' responsibilities and aspirations.

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INTRODUCTION & EXECUTIVE SUMMARY



CONTEXT

Tulsa is emerging as one of America's great cities.

Tulsa's economy is on the cusp of becoming a national contender for sustainable wage companies and high skill talent. Just this year, international companies like Tesla and Muncie Power Products knocked on Tulsa's door, downtown investment continued to surge, **and job growth exceeded U.S. rates by 47 percent.** With a dedicated and innovative philanthropic sector, Tulsa's daring ambition has transformed the city into an **attractive, exciting hub of economic activity** in the Heartland.

However, this economic transformation has so far bypassed too many Tulsans and too many neighborhoods.

If anything, the city's vibrant downtown and surging reputation underscore **disparities in access to economic opportunity** dating back to the era of forced segregation, job discrimination, and the 1921 Race Massacre that devastated Tulsa's prosperous Black economy. A century later, Black Tulsan households still live on 40% less than White Tulsan households, and eviction rates are 1.6 times higher in majority-minority Census tracts than in majority white tracts.



STUDY OBJECTIVES



Land at the Peoria-Mohawk Business Park and TIF

Economic development in Tulsa is at an inflection point.

Facing fractured economic development ecosystems, many Middle American cities are reconfiguring—even merging—their economic development entities.

Nimbleness has become the new standard. Cities can no longer wait for prospective clients, investors, and companies to come to them. They must do the work of building smart cities, furthering investments that create great places and cultivate a robust, strong community where individuals can start and grow their own businesses.

The City of Tulsa retained HR&A Advisors to determine **how its economic and community development functions could be structured for greatest effectiveness.**

This resulting Framework represents Tulsa's **next step in its visionary pursuit of economic prosperity for all residents.**

The focus of the study is to capitalize on the City's strengths, increase its economic competitiveness, and better accomplish citywide priorities for inclusive economic and community development. As such, analysis focused on **how best to align the activities, missions, and structures of seven key City economic development entities.** The recommendations that follow seek to:

- Recommend effective **policies and organizational changes** that align public-facing departments, boards, and authorities to better serve Tulsans.
- Leverage Tulsa's strengths to position the City for **long-term growth and upward mobility.**
- Lay the groundwork for decision-making processes that **give voice** to those whom the City supports.
- Equip the City of Tulsa with the right tools, programs, and strategies to **make a meaningful difference** for Tulsa's historically marginalized communities.

PROJECT APPROACH

This plan sets a structural framework to deliver upon the City's strategic goals.

The HR&A team began work in early 2020, collaborating with City leadership and staff to create an **inclusive strategy for effectively aligning Tulsa's economic development apparatus with its overarching strategic goals**, capitalizing on Tulsa's strengths and building on the momentum of the city's recent successes. The strategy focuses on seven of the City's core departments, commissions and authorities that deliver economic and community development services.

The strategy is anchored in the vision set forth in the City's 2018 strategic plan, the AIM Plan, which sets forth a mission to **build the foundation for economic prosperity, improved health and enhanced quality of life for the Tulsa community**.

Entities Under Review

MAYOR'S OFFICE OF ECONOMIC DEVELOPMENT (MOED)

- Primary municipal economic development body in Tulsa.
- Manage strategies to grow Tulsa's population, quality jobs, workforce, businesses, and tourist footprint.

MAYOR'S OFFICE

- Includes appointed staff for Mayor G.T. Bynum
- Select staff manage Tulsa's affordable housing, planning, education, and equitable development strategies, as well as other key City programs.

ECONOMIC DEVELOPMENT COMMISSION (EDC)

- Advises on Fund 130 (EDC Fund) allocation.
- Contract oversight for economic and tourism development efforts with external entities.

TULSA DEVELOPMENT AUTHORITY (TDA)

- Purchase, manage, and sell properties to support neighborhood development
- Have Eminent Domain powers
- Issue sector plans for residential and commercial revitalization

TULSA INDUSTRIAL AUTHORITY (TIA)

- Manage newly established TIF districts for the City
- Formerly more involved in issuing bonds and brownfield remediation
- Lease Airport Hangar

TULSA PARKING AUTHORITY (TPA)

- Manage and maintain parking assets
- Can issue revenue bonds

TULSA PUBLIC FACILITIES AUTHORITY (TPFA)

- Primary issuer of revenue bonds
- Lease and manage capital improvement for major City assets

PROJECT APPROACH

HR&A evaluated current conditions and consulted with leaders from across Tulsa.

HR&A drew from reports, indenture documents, budgets, plans, and – most importantly – extensive interviews with staff and Board members. The initial vision for the project was set by a **Steering Committee** comprised of City leadership, Board Chairs from the representative entities, and other civic leaders.

The team facilitated seven stakeholder roundtable discussions, held more than **30 staff interviews from 9 agencies, departments, and commissions, and reviewed more than 200 reports, documents, and publications.**

All findings were discussed with a **Working Committee** composed of entity staff and economic development practitioners.

A full list of staff, committee members, and stakeholder groups that contributed to this report can be found in the Appendix.

A deep assessment of the seven key entities led to a series of strategic and structural recommendations.

The initial assessment and outreach, yielded meaningful findings. The City's current approach towards economic development **leaves most of its economic and community development priorities outside of its sphere of influence**, as defined by its AIM Plan. Legacy priorities such as downtown revitalization and large business attraction redirect City resources away from its stated ambitions for inclusive growth. The result is an approach that **reflects where Tulsa has been but not where the city wants to go.**

The team sourced best practices for how other cities have handled similar challenges. Based on emerging trends and lessons learned elsewhere, the team crafted **recommendations on structural alignment, organizational roles and responsibilities, and**

operational practices. These recommendations were refined to reflect the on-the-ground expertise of the Working and Steering Committees.

This framework document lays out the rationale for a **proposed consolidation** of the authorities, boards, commissions, offering practical **implementation guidance** to ensure that the new entity is positioned for success.

ANALYTIC LENS

This study relies on five key lenses of analysis:

- Mission & Objectives
- Structure & Governance
- Funds & Assets
- Operational Efficiencies
- Partnerships & External Engagement

VISION

Rethinking Tulsa's economic development apparatus will unlock new opportunities to profoundly advance inclusive economic prosperity.

This proposed framework represents a meaningful **change in how Tulsa conceptualizes economic and community development**, particularly the impactful role of municipal government to deploy policy and leverage its assets to advance change.

The framework suggests an **evolution** in Tulsa's aspirations for its own economic future and suggests a **heightened focus on investment in inclusive economic development** in Tulsa.

When implemented, the reorientation of the City's economic development apparatus will put Tulsa on a **short list of cities** pursuing a new, innovative approach to **inclusive growth**.

This framework recommends that the City consolidate most of its economic development functions into a new economic development entity (EDE).

A series of practical considerations will position the new EDE for success:

- A **clear mission and vision** will unambiguously articulate the City's role in advancing economic development goals and citywide strategy, whether as a leader, convener, or supporter of civic partners.
- With an **independent, professionally staffed and equity-minded entity**, the City's economic and community development efforts will be more credible, more accountable, and more proactive.



Groundbreaking at Evans-Fintube site

- A **cohesive reporting structure** will break down siloes, eliminate redundancies, and centralize municipal economic development resources and powers for greater impact.
- With a curated set of **targeted, mission-aligned performance goals**, the City can measure progress and refocus its resources on the initiatives that matter most.

VISION

Tulsans will benefit from an EDE with a long-term strategy focused on equity and inclusion.

The new EDE will be governed by a **single independent board comprised of diverse individuals with a mix of relevant skillsets**. This board should reflect the racial, ethnic and gender diversity of Tulsa, bringing new voices, perspectives, and experience to the table. This structure also provides continuity across mayoral administrations.

With a team of professionals working strategically toward lofty goals, this shift would allow access to a **breadth of expertise and on-the-ground experience** not otherwise available. Staff will be able to focus on high-impact projects instead of administrative support.

Tulsa young entrepreneurs

Source: USA Today

Tulsans will know how the EDE is investing taxpayer money.

The formation of an EDE would ensure the **most impactful use of the City's economic development resources**. Tulsans will see more accountability and transparency in the \$266 million in capital assets and funds collectively housed across entities. In doing so, the City becomes a stronger steward of taxpayer dollars, **turning City-owned liabilities into publicly leveraged assets**, ensuring economic and community development goals maximize the return on investment.



All Tulsa communities will be included.

By granting more access to those who historically have not had it and bringing tools, resources, and networks to the forefront for all to leverage, this **new approach to economic development seeks to level the playing field**. This represents a shift away from processes that have historically felt difficult to navigate and peels back the curtain for **all Tulsans to thrive and reach their full potential**.

MISSION & OBJECTIVES



Is the economic development mission clear, generally understood, and conducive to demonstrable fulfillment?

How does mission align with the needs and values of the City's partners, key stakeholders, and residents?

Findings

While the authorities, boards and commissions under study have spearheaded meaningful investments for Tulsa, their collective missions are not representative of the City's AIM goals.

The City's current approach leaves most of its economic and community development priorities outside of its sphere of influence. Resource allocations and program offerings do not align with the City's broader policy priorities, and there has been a lack of clarity on what role the City should play in advancing Tulsa's economic and community development priorities.

Recommendations

The City should establish an economic development mission with an explicit focus on shared prosperity and racial equity.

1. Given that Tulsa's economic development priorities have changed over time, the City must reevaluate the roles that it wants to play in advancing the goals articulated in the AIM Plan and recent citywide strategies.
2. The City should translate this overarching vision for its role in economic development into a formal mission and set of organizational approaches.
3. The City should curate a set of targeted, mission-aligned performance goals for its economic development activities, with the intent of measuring and reporting its progress.
4. The City should operationalize its vision and mission statement by reconfiguring its dispersed economic development functions so that all activities build towards the larger goals of shared prosperity and racial equity.

STRUCTURE & GOVERNANCE



Is the structure of governance and decision-making clear, transparent, effective, and efficient?

Findings

While the City's entities have made significant contributions to advance economic development in Tulsa, each operates independently and lacks a holistic focus.

Though each entity advances economic development through its scope of work, the absence of a cohesive reporting structure complicates coordination and gives rise to redundancies.

In Tulsa, well-selected and well-run independent boards bring credibility and consistency to the City's economic and community development efforts, and there are legally permissible ways for the City to reconfigure its economic development functions without running afoul of statutory requirements.

Recommendations

The City should streamline and consolidate its functions under a single independent economic development entity with a clear charge.

5. The City should consolidate the majority of its economic development functions into a single economic development entity (EDE).
6. The EDE should be governed by a single independent board, with 5 EDE board members holding synchronous appointments on the TDA board.
7. In aggregate, the EDE Board should encompass a mix of relevant skillsets and reflect the racial, ethnic, and gender diversity of Tulsa.
8. To ensure a diverse pipeline of future board members, the Mayor should employ robust nomination and ongoing recruitment processes.
9. A comprehensive, user-friendly onboarding curriculum should be assembled and shared with all incoming EDE Board members and new staff.
10. A management agreement should be put in place to enhance accountability to Tulsa taxpayers.

FUNDS & ASSETS



Are resources and assets deployed, managed, allocated, and communicated effectively?

Findings

Given that each entity under study manages its funds and assets independently, it's difficult to fully ascertain the full extent of economic assets, resources, investments, and activities across the city.

Current reporting conventions offer insufficient transparency or insight into how public dollars are deployed for economic development purposes. Furthermore, siloed resource allocation serve the best interests of individual authorities but may not represent the most impactful use of the City's economic development resources overall. In particular, the Authorities' real estate portfolio could be managed and curated more strategically, in ways that more tangibly advance the City's overall economic development mission.

Recommendations

The City should structure a clearer understanding of its economic development activities and consolidate the funds and assets dedicated to economic development under the new EDE. Doing so can better position the EDE to strategically deploy those resources to drive programs and projects toward mission-driven, equity-focused goals.

11. The City Finance Department should track all public dollars deployed for economic development purposes, integrating these revenues and transfers as standard components of the annual budget process.
12. The EDE should launch a strategic review of the consolidated asset portfolio, culminating in mission-centered disposition goals and timeline.

OPERATIONAL EFFICIENCIES



Are staff appropriately skilled and resourced to perform tasks at hand?

Are internal processes and procedures well-suited to their purposes and efficiently carried out?

Findings

Outside of the City departments, there are few full-time entity staff carrying out day-to-day economic development operations.

Despite the presence of some very talented staff, resources are limited and largely monopolized by procedural tasks, leaving little bandwidth for nimble or proactive initiatives. Inconsistent process documentation, performance monitoring, and use of decision-making criteria hinder transparency, accountability, and succession planning. Fortunately, there are already systems in place that allow experienced City staff to provide specialized support to other Tulsa Authorities.

Recommendations

The EDE should reflect a new unified staffing structure, offering an opportunity to strengthen operational efficiencies and focus the organization on its core mission.

13. The EDE should execute its activities using a shared staffing configuration.
14. Using TARE and TMUA as models, the EDE management agreement should allocate responsibilities for procedural tasks to those best positioned for efficient and cost-effective execution, be they EDE staff, City departments, or third-party contractors.
15. EDE staff should document standard operating procedures for all multi-step procedural workstreams that remain EDE responsibilities, such as land disposition, RFP issuance, or contract compliance oversight.
16. The EDE should embed the City's economic development mission statement into its staff roles and functions, clearly aligning job descriptions and specialized skillsets with overarching priorities.
17. The EDE should develop standardized decision-making guides or checklists to test the extent to which a particular investment opportunity aligns with the entity's broader mission and objectives.

PARTNERSHIPS & EXTERNAL ENGAGEMENT



How well is the organization's work communicated to outside stakeholders?

What is the format and scope of the organization's community engagement efforts?

Findings

Tulsa benefits from a rich set of external partners with which the City advances economic and community development.

Nonetheless, many external parties are unaware of the City's economic and community development priorities and key initiatives. Potential clients struggle to access the City's economic and community development offerings, reducing the type and number of Tulsans who benefit from municipal economic development resources. Finally, the current approach to community engagement has been inconsistent, creating confusion and, in some cases, failing to remedy longstanding community skepticism and mistrust of some of the organizations under review.

Recommendations

The City should reintroduce its role as a key partner in the economic development ecosystem, setting a strong plan for future communications, engagement, and community-driven guidance.

18. Leverage the release of the EDE's Strategic Plan and the launch of the consolidated entity as opportunities to reintroduce the City as a key actor in the economic development ecosystem.
19. Launch and regularly update a public-facing website for the consolidated EDE, designed with Tulsa businesses, and prospective investors and partners in mind.
20. Hire a community engagement specialist to centralize outreach and cultivate relationships with community leaders and potential partners.
21. Work with community and neighborhood group leaders to establish baseline expectations for community engagement, both for specific projects and for long-term input into the entity's priorities.
22. The consolidated economic development entity should consider ad hoc committees and task forces to enhance community engagement and inform board decision-making.

PLAN IMPLEMENTATION

Next 6
Months

LAY THE GROUNDWORK

Undertake consolidation of existing structures into the new EDE.

Advance conversations with civic leaders on how City economic development tools and powers can most effectively advance racial equity and upward mobility.

6 – 18
months

GET UP & RUNNING

Launch a community-driven Strategic Planning process for the new EDE to inform:

- Mission and vision
- Roles and responsibilities
- Core programmatic initiatives and implementation
- Staff and leadership recruitment

18+
Months

REVIEW, REFINE & ENHANCE

Review potential for ongoing organizational improvements.

Design and implement mission-centered programming to carry out core organizational initiatives.

Focus on long-term repositioning of strategic assets to advance mission.

MISSION & OBJECTIVES



SUMMARY



Is the economic development mission clear, generally understood, and conducive to demonstrable fulfillment?

How does mission align with the needs and values of the City's partners, key stakeholders, and residents?

Findings

While the authorities, boards and commissions under study have spearheaded meaningful investments for Tulsa, their collective missions are not representative of the City's AIM goals.

The City's current approach leaves most of its economic and community development priorities outside of its sphere of influence. Resource allocations and program offerings do not align with the City's broader policy priorities, and there has been a lack of clarity on what role the City should play in advancing Tulsa's economic and community development priorities.

Recommendations

The City should establish an economic development mission with an explicit focus on shared prosperity and racial equity.

1. Given that Tulsa's economic development priorities have changed over time, the City must reevaluate the roles that it wants to play in advancing the goals articulated in the AIM Plan and recent citywide strategies.
2. The City should translate this overarching vision for its role in economic development into a formal mission and set of organizational approaches.
3. The City should curate a set of targeted, mission-aligned performance goals for its economic development activities, with the intent of measuring and reporting its progress.
4. The City should operationalize its vision and mission statement by reconfiguring its dispersed economic development functions so that all activities build towards the larger goals of shared prosperity and racial equity.

Mission & Objectives | Findings

1. The City's current approach leaves most of its economic and community development priorities outside of its sphere of influence.
2. Resource allocations and program offerings do not align with the City's broader policy priorities.
3. There is little clarity on what role the City should play in advancing Tulsa's economic and community development priorities.

Tulsa's AIM Plan is its guiding vision for municipal priorities.

Tulsa's **Action and Implementation Management (AIM)** Plan is a guiding vision for city government, reflecting Elected Officials' and Senior Leadership's priorities. The AIM Plan clearly documents the overarching goals, strategies, and the tactics that city government will use in order to advance the desired outcomes.

Mayor Bynum and City Council approved the first iteration of the AIM Plan in 2018. In 2020, City staff further streamlined the AIM Plan into four overarching pillars:

- 1) Build a stable economy that provides for growth, an educated workforce, jobs, and **upward mobility**.
- 2) Create **neighborhoods** and infrastructure that promote health and safety.
- 3) Increase **social cohesion** and engagement to help people thrive.
- 4) Provide the highest quality of **municipal services** that build the foundation for AIMS 1-3.

The AIM Plan is the yardstick that HR&A uses to assess the City's economic development functions.



At present, most AIM Plan strategies for economic development fall outside the City's direct sphere of influence.

Applicable AIM Pillars



Build a stable economy that provides for growth, an educated workforce, jobs, and upward mobility.

- Increase the availability of **quality employment opportunities**.
- Ensure Tulsans are prepared for current and future **career opportunities**.
- Build a **foundation for upward mobility** through efforts to maximize disposable income and reduce cost burdens.
- Spur and **facilitate investment and development** that increases the quality of life for Tulsans.



Create neighborhoods and infrastructure that promote Tulsans' health and safety.

- Safe, **affordable housing** for all Tulsans.
- Strong **transportation connections** to goods and services.
- Safe and attractive **public places and spaces**.

Corresponding Strategies

Lead Actors

Mayor's Office of Economic Development, in partnership with Tulsa Regional Chamber, nonprofits, Oklahoma Department of Commerce

Workforce Investment Board, colleges and universities, philanthropy, nonprofits

Job placement services, affordable housing developers, philanthropy

City, leveraging proposals from private developers, Main Street districts, Downtown Coordinating Council

Tulsa Housing Authority, Working in Neighborhoods, Tulsa Health department, Tulsa housing policy director, home builders

Tulsa Transit, Tulsa Streets & Stormwater department, Vision Tulsa

Tulsa Parks & Recreation, Tulsa Police department, Capital Improvements Plan efforts, Destination Districts, philanthropy

This misalignment can be traced back to the missions of Tulsa's various municipal economic development entities.

Entity		Mission Statement
Authorities & Commissions	EDC	"Assembling, distributing and advertising information...to promote the orderly development and use of the natural and human resources...Promote the development of the City as a convention and tourist center ..."
	TDA	"...help neighborhoods and commercial centers to thrive and sustain growth and prosperity."
	TIA	"To stimulate economic growth and development of Tulsa by acting as a vehicle for tax exempt financing and issuing grants for the Brownfield program ."
	TPA	"To promote acquisition, construction and operation of parking facilities within the City of Tulsa..."
	TPFA	"To promote the acquisition, construction and operation of various facilities and public improvements in and for the City of Tulsa."
City Depts.	MOED	" To strengthen the economy and create shared prosperity for all Tulsans by developing and managing resources which spur business creation and expansion, and facilitate new development and investment..."

By design, the Authorities and Commissions focus specifically on **urban renewal and development financing**, legacy priorities from different historical contexts.

Only the mission of MOED mirrors the AIM Pillars of upward mobility for all Tulsans.

Likewise, the outsize importance of downtown revitalization and large business attraction in City operations and assets reflects legacy priorities rather than AIM Plan strategies.



Downtown Revitalization

- Most TPA and TPFA assets are concentrated Downtown.
- The majority of TIF Districts are located within the Inner Dispersal Loop.*

* TIF: 11th and Lewis was established in 2018 and Peoria Mohawk Business Park was approved in November 2020.



Large Business Attraction

Tulsa's Amazon draft bid included at least \$500 million in city incentives

By Kevin Canfield Tulsa World Nov 14, 2018

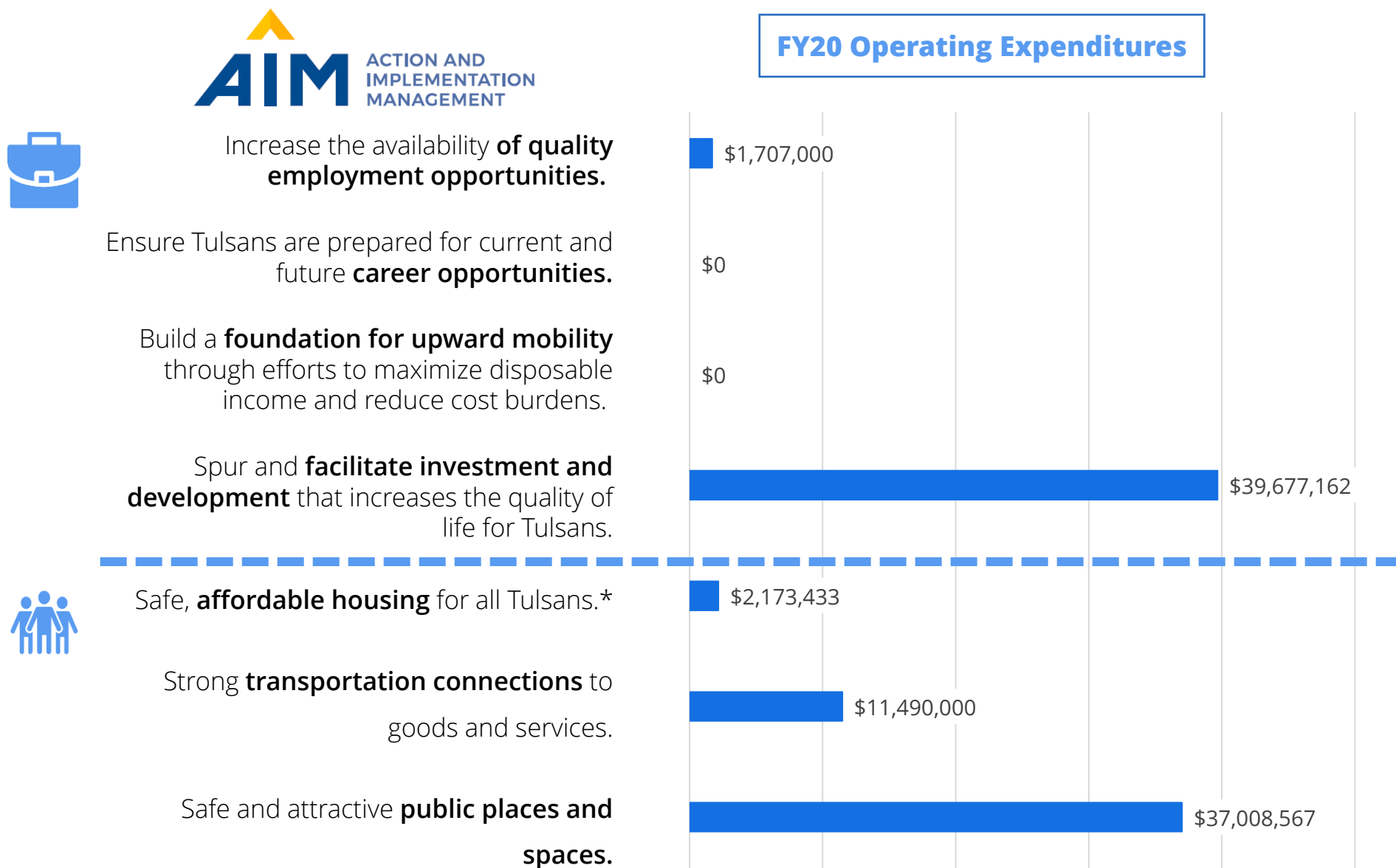
Tesla CEO Elon Musk makes visit to Tulsa to view possible site for factory

Kevin Canfield Jul 6, 2020

National BMX Headquarters To Make Tulsa Center For Extreme Cycling

Friday, November 15th 2019, 8:05 pm
By: Erick Payne

The various AIM strategies receive uneven levels of ongoing funding support.



Source: FY20 Budget, General Fund, Enterprise Funds, and Authority Funds.

* Does not reflect Downtown TIF funds.

Funding sources are largely restricted and/or controlled by other entities, curbing economic development agility and bold innovations.



FY20 Operating Expenditures



Increase the availability of **quality employment opportunities**.

EDC (Fund 130) + MOED General Fund budget allocations, Downtown Coordinating Council

Ensure Tulsans are prepared for current and future **career opportunities**.

Build a **foundation for upward mobility** through efforts to maximize disposable income and reduce cost burdens.

Spur and **facilitate investment and development** that increases the quality of life for Tulsans.

Operating budgets for TIA, TDA, TPA, TPFA, Economic Development Infrastructure Fund, One Tech Center (Fund 550), Convention & Visitors Fund (Fund 131), PAC Fund (Fund 132), select Mayor's Office salaries



Safe, **affordable housing** for all Tulsans.*

WIN (Funds 2000 - 2003), Salaries for affordable housing staffing at the City

Strong **transportation connections** to goods and services.

Tulsa Transit

Safe and attractive **public places and spaces**.




Parks & Rec, Gilcrease Museum Department, River Parks Authority, Performing Arts Center Trust, Destination Districts/Main St. programs, Whittier Square Improvement District (Fund 142), Stadium Improvement District Fund (Fund 141)

* Does not reflect Downtown TIF funds.

HR&A ADVISORS

City entities under review are largely unassociated with broader economic and community development initiatives currently underway in Tulsa.

In order to meaningfully execute newer, more targeted strategies, the City must be able to redistribute resources and operations. The City's economic development entities currently lack the organizational adaptability to do so.

Tulsa Strategies	Entities charged with implementation task(s)	
	City economic development entities	Other entities
2018 Gallup Citivoice		"The City" generally, philanthropy, public health experts, academic researchers, university and college representatives
2019 Affordable Housing Strategy	The City, TDA , TIA	THA, Tulsa Health Department, County government, State entities, OK Policy Institute, TPS, several non-profits and foundations
2018 Retail Strategy	MOED, by default	Tulsa Planning Office, Destination Districts, commercial brokers
2019 Equality Indicators		Mayor's Office of Resilience and Equity
2020 TIL Tulsa's Tech Niche		"The City" generally, Tulsa Regional Chamber, universities, non-profits, and private companies throughout Tulsa

Mission & Objectives | Recommendations

1. Given that Tulsa's economic development priorities have changed over time, the City must reevaluate the roles that it wants to play in advancing the goals articulated in the AIM Plan and recent citywide strategies.
2. The City's updated understanding of its economic development roles should be formalized in a mission statement and guiding vision.
3. The City should curate a set of targeted, mission-aligned performance goals for its economic development activities, with the intent of measuring and reporting its progress.
4. The City should operationalize its updated economic development mission through a reconfiguration of its dispersed economic development functions, so that all activities build towards the larger goals of shared prosperity and racial equity.

Tulsa's economic development priorities have changed. What role could/should the City play in advancing its updated priorities?

OUTCOMES FOR TULSANS

As a first step, the City must convert the AIM Plan into a set of concrete economic development ambitions.

Examples include:

- *Ample supply of family-wage jobs*
- *Capital investment in historically underserved neighborhoods*
- *Thriving ecosystem of minority and women-owned businesses*
- *Career pathways that offer upward mobility to all Tulsans*



CITY ROLE

Determine the role that the City can and should play in the pursuit of these outcomes.

Examples include:

- *Prioritize development projects that build wealth in North Tulsa*
- *Reform the City procurement process to encourage greater participation by minority and women-owned businesses*
- *Restrict business incentives to companies that create family-wage jobs*
- *Facilitate bold collaborations between workforce development, higher ed, and local businesses*

Some AIM strategies lend themselves to civic rather than municipal leadership. This does not absolve the City of implementation responsibility.

The powers and limitations of municipal government determine how the City can most effectively advance economic development priorities. The City should adapt its role to the gaps in Tulsa's economic development ecosystem.



Lead

As a leader, the City **determines the overall objectives** and **delegates roles and responsibilities** to each entity in the ecosystem. The entities then align behind the City and each work to implement the priorities.

Example: The City leads Tulsa's major business attraction efforts, in close collaboration with the Chamber.



Convene

As a convener, the City **sets priorities and establishes a vision** for what economic and community development should look like and **brings the entities together to collaborate and form partnerships** that help deliver on that greater vision. The City might organize research and drive advocacy and marketing efforts to assist the entities in delivering meaningful and effective programming.

Example: As a convener, the City could instigate innovation collaborations between major workforce development providers and local employers.



Support

As a supporter, the City **strategically allocates and transfers funds to the entities for programs and projects that deliver on the City's objectives and goals**. The entities that are most successful at accomplishing what the City sets out receive greater support.

Example: small business resources and incubator programming

Translate this updated understanding of the City's economic development roles into a formal mission statement.

The mission will guide all subsequent decisions around operations and investments.

Precedent | Portland, OR

Prosper Portland

Mission

To create economic growth and opportunity for Portland

Vision

...Prosper Portland stimulates job creation, encourages broad economic prosperity, and fosters great places on behalf of the City of Portland...

...We make racial equity the foundation of our community and economic development work...

Objectives

- Create healthy, complete neighborhoods throughout Portland
- Provide access to high quality employment for Portland residents
- Foster wealth creation within communities of color and low-income neighborhoods
- Form 21st century civic networks, institutions, and partnerships
- Operate an equitable, innovative and financially sustainable agency

Tulsa

Because equity is such a critical goal in Tulsa, the City should consider incorporating elements of an equity statement that acknowledges Tulsa's history.

Vision should be explicit about a shared prosperity model that includes all Tulsans.

The economic development objectives should refine the AIM Plan strategies based on an updated understanding of appropriate City roles.

The City should curate a set of targeted, mission-aligned performance goals for its economic development activities, with the intent of measuring and reporting its progress.

Performance goals translate an organization's overarching vision into **concrete, achievable objectives**. Even more than its mission statement, these tangible objectives serve as practicable guides amidst resource allocation decision-making, **discouraging significant investments in non-mission-related work**.

Equally important, performance goals are **accountability** tools. Progress should be tracked, publicly reported, and operational adjustments should be made if warranted.

Performance goals should track **outcomes over which the entity has direct control**. The city-level metrics tracked in the Tulsa's Equity Indicators report, for example, do not take into account the roles that municipal government plays in advancing upward mobility.

Examples include:



Units of housing – including workforce housing - developed on former TDA parcels



Family-wage jobs created or retained by companies receiving City incentives



City contracts awarded to MWBE firms



Sub-baccalaureate participants in City-funded job training and credentialing programs



MWBE businesses located in TIF districts



Growth in the number of business licenses issued to applicants located in target neighborhoods

Operationalize the updated economic development mission through a reconfiguration of the current organizational structure.

Precedent | Pittsburgh, PA

People, Not Projects

"...turn away from the large master redevelopment projects, and [to] focus more intently or deliberately...to do more neighborhood improvement, neighborhood investment, more micro-scale investment that will hopefully lead to bigger, catalytic projects down the road."

-Executive Director of Pittsburgh's URA

Refocusing on **small business support, neighborhood revitalization, affordable housing, and human capital development**, the URA began to operationalize its new concentrations by:

- Reorganizing its internal organizational structure
- Shifting towards new self-sustaining funding sources
- Considering a new name and building a new brand

FIG.8: Comparison of the URA's current responsibilities with a future state under a more streamlined organizational structure.

	URA Current State	URA Future State
Business Attraction/Retention	●	●
Business Support	●	●
Entrepreneurship	●	●
Workforce Development	○	●
Commercial/ Mixed Use Redevelopment	●	●
Land Acquisition/Disposition	●	●
Affordable Housing	●	●
Infrastructure/ Public Works	●	○
URA is:	● Primarily responsible (leading role)	● Partially responsible (coordinating or supporting role)
	○ Not responsible (no role)	

Source: URA Organizational Study, March 2020

STRUCTURE & GOVERNANCE



SUMMARY



Is the structure of governance and decision-making clear, transparent, effective, and efficient?

Findings

While the City's entities have made significant contributions to advance economic development in Tulsa, each operates independently and lacks a holistic focus.

Though each entity advances economic development through its scope of work, the absence of a cohesive reporting structure complicates coordination and gives rise to redundancies.

In Tulsa, well-selected and well-run independent boards bring credibility and consistency to the City's economic and community development efforts., and there are legally permissible ways for the City to reconfigure its economic development functions without running afoul of State statutory requirements.

Recommendations

The City should streamline and consolidate its functions under a single independent economic development entity with a clear charge.

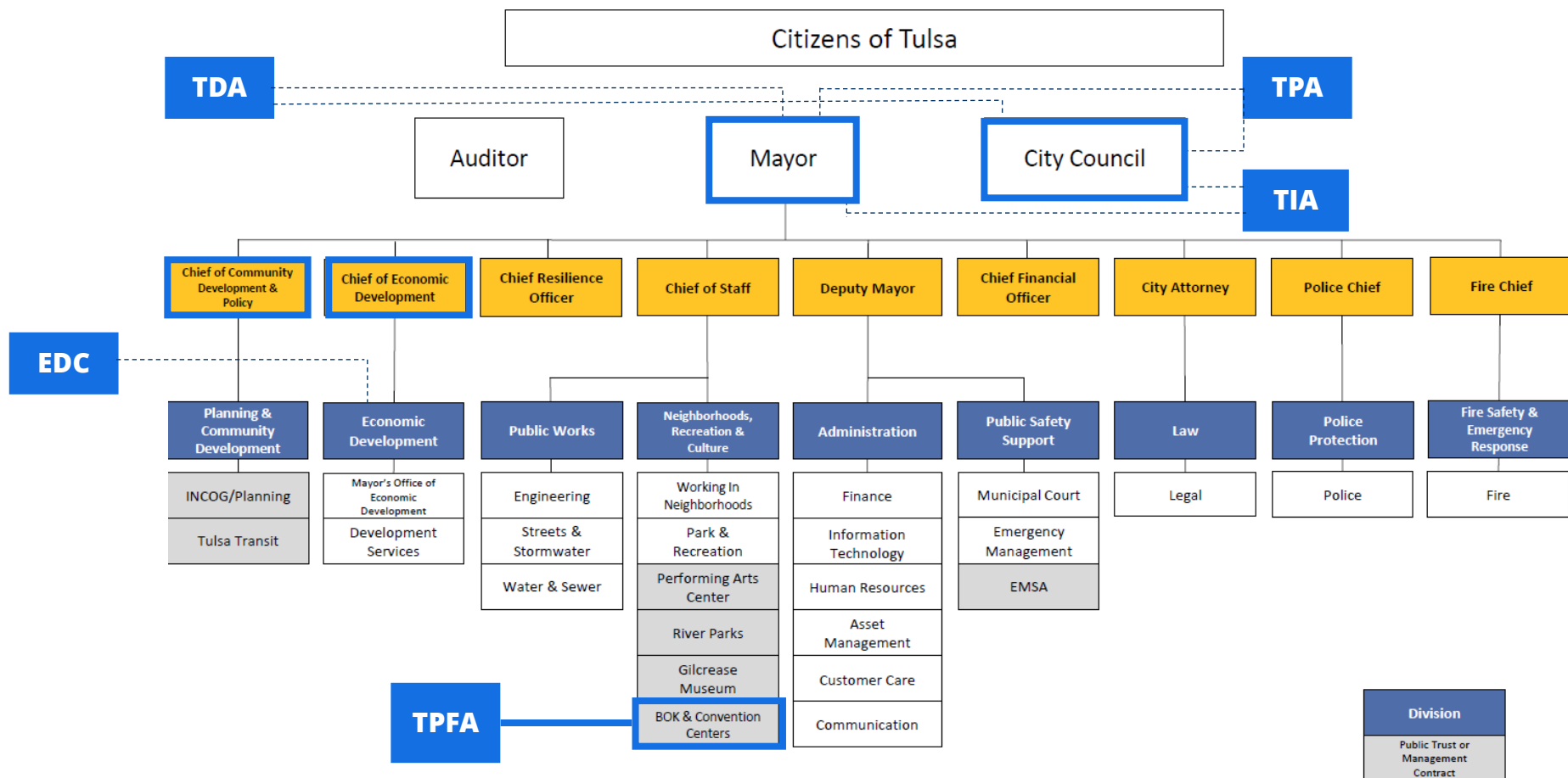
5. The City should consolidate the majority of its economic development functions into a single economic development entity (EDE).
6. The EDE should be governed by a single independent board, with 5 EDE board members holding synchronous appointments on the TDA board.
7. In aggregate, the EDE Board should encompass a mix of relevant skillsets and reflect the racial, ethnic, and gender diversity of Tulsa.
8. To ensure a diverse pipeline of future board members, the Mayor should employ robust nomination and ongoing recruitment processes.
9. A comprehensive, user-friendly onboarding curriculum should be assembled and shared with all incoming EDE Board members and new staff.
10. A management agreement should be put in place to enhance accountability to Tulsa taxpayers.

Structure & Governance | Findings

4. The absence of a cohesive reporting structure complicates coordination and gives rise to redundancies.
5. In Tulsa, well-selected and well-run independent boards bring credibility and consistency to the City's economic and community development efforts.
6. There are legally permissible ways for the City to reconfigure its economic development functions without running afoul of State statutory requirements.

The entities under review are structurally siloed and scattered throughout City government, an organizational design that complicates coordination.

The absence of any cohesive reporting structure is due in part to the fact that the entities under review were created at different times, for different purposes.



There is significant overlap in economic development roles and responsibilities.

Absent intentional structural alignment, redundancies and inefficiencies abound.

Roles & Responsibilities	City Entities Actively Involved	Coordinated Decision-Making	Notes
Strategy & Long-Term Planning	MOED, Mayor's Office, TDA, INCOG, (EDC)	Limited Historically	Limited historical coordination of outreach efforts or plan alignment
Redevelopment	MOED, Mayor's Office, TDA, TIA, TPA	No	Piecemeal, reactive
Land Acquisition & Disposal	TDA, TPA	No	Not optimally managed
Bond Issuance	TPA, TIA, TPFA	No	Ad Hoc
Passthrough Funds	TDA, TPFA, MOED, Mayor's Office, WIN	Siloed	Coordination isn't necessary, but closer alignment could yield efficiencies
Operations Contract Management	TIA, TPA, TPFA, Mayor's Office	Siloed	Coordination isn't necessary, but closer alignment could yield efficiencies
Focus on Downtown	TDA, TPA, TPFA, MOED, TIA	No	Uncoordinated, without prioritization
Focus on Underserved Neighborhoods	WIN, TDA, Mayor's Office	No, at great cost to public trust	Uncoordinated and inefficient
TIF	TDA, TIA, MOED	Somewhat, via MOED	Strategic and aligned with goals
Incentives	MOED, TIA, TDA	Somewhat	Historically limited, MOED has more recently sought to establish targeted programs and create transparency in policies and processes

Seamless coordination is all the more crucial because many important economic development functions are led by entities outside the purview of this study.

These public and civic sector entities are less likely to be recognized or leveraged as key economic and community development actors.

Economic Development Function	MOED & Mayor's Office	ABCs Under Review*	Other Public Entities	Civic Sector
Public Infrastructure	✓	✓	✓	
Downtown Revitalization	✓	✓		✓
Land acquisition/disposition		✓	✓	
Business attraction	✓			✓
Affordable housing	✓	✓	✓	✓
Neighborhood revitalization	✓	✓		✓
Small business and entrepreneurship support	✓			✓
M/WBE support	✓			✓
Talent attraction				✓
Workforce development				✓

✓ = Key function ✓ = Some involvement

*ABCs = Authorities, Boards, and Commissions

The City struggles to integrate its various economic development efforts, to the detriment of overall effectiveness.

Staff, board members, and stakeholders shared concerns about information sharing, investment coordination, the streamlining of administrative tasks, and accountability.

"There's a lot of overlap between the entities. We step on each other's toes...There's not enough conversation and transparency between us. The RFP process for this project was the first time I met leaders on other boards."

"Because the trusts and authorities are separately managed, that structure impedes the effective use of the city's resources."

"Some processes in the City have become overly complicated and that pushes potential investors away."

"The entities need to be better aligned– some seem to be working at odds with one another."

"The processes can be so complicated and frustrating that the system deters good ideas."

"The entities are so siloed that their work seems haphazard. They don't talk to each and have no common agenda."

"With no common strategy, everything is reactive instead of proactive. It feels like what gets done in Tulsa happens in spite of, not because of, the authorities."

Source: Interviews with staff, board members, and stakeholders. See the Appendix for a full list of interviewees

Facing fractured economic development ecosystems, many Midwestern cities are reconfiguring – even merging – their economic development entities.

Precedent | Greater Indianapolis, IN



"No longer are we sitting by the phone and waiting for some large company to call. We are focusing on community development; we're focusing on placemaking; we are doubling down on helping individuals start and grow businesses; we're creating our own economic activity."

- CEO of Aspire Johnson County

Source: Inside Indiana Business

Precedent | St Louis, MO

"The deep fragmentation of the St. Louis region has been a hindrance for too long. Cracks had gotten filled by people with narrow agendas. We've got to up our game here. It's very apparent that some of these other cities are ahead of us."

- CEO of Greater St. Louis Inc

Source: St Louis Post Dispatch

GREATER ST. LOUIS, INC. OPERATING STRUCTURE



In Tulsa, independent board structures are viewed as positive organizational features worth preserving, albeit with thoughtful modifications.

According to interviewees, well-selected and well-run independent boards bring credibility and stability. Safeguards are a must to guarantee transparency and mission alignment, along with a redesign of board processes to better leverage members' creativity and experience.

Reported Strengths

Legal separation bolsters **insulation from political pressure.**

Board structures allow **stakeholders to be "part of the solution."**

High profile board members bring **thought leadership and credibility** to actions.

Board members can inform deliberations with their **on-the-ground experience.**

No single person has the power to change the City's overarching economic development direction.

Reported Challenges

The **process of recruiting qualified, dedicated board members can be difficult** if they do not feel empowered to do meaningful work.

There is **little transparency** into decisions that result in the allocation of significant public resources.

Board members are **not directly accountable to the public.**

Inexperience increases the **risk of "rubber stamping."**

There is a risk of **long-term board members exerting outsize control**, subduing other voices and shifting mission focus.

Any structural reconfiguration must contend with real differences in entity powers and statutory obligations.

	City Department (MOED, Mayor's Office)	Task Force (EDC)	Title 60 Public Trust (TPA, TPFA, TIA)	Title 11 Urban Renewal (TDA)
Able to issue revenue bonds			✓	✓
Able to issue conduit financing to third parties			✓	
Able to issue a bond without owning the underlying asset			✓	
Bond-supported projects must align with authorized mission			✓	✓
Can establish TIF districts	✓			
Can administer TIF	✓		✓	✓
Can acquire property for redevelopment through eminent domain				✓
Must be headed by a board structure		✓	✓	✓
Board can include City staff or elected officials		✓	✓	

HR&A conferred with outside counsel on the various legal hurdles with which any reconfiguration must comply.

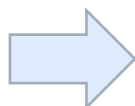
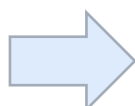
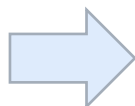
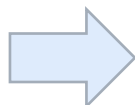
Legal Hurdles

As a Title 11 entity, TDA's board and statutorily-assigned functions cannot merge with Title 60 entities.

A Title 60 entity must retire all outstanding debt prior to merging into another.*

Elected officials cannot serve on Title 11 boards.

Both Title 11 and Title 60 entities must be governed by independent boards and not subject to City Council oversight.



Impact for Reconfiguration

TDA must retain a separate board.

Because outstanding TIA and TPFA debt is serviced by third party revenue streams, these entities are poor candidates for a merger.

Neither the Mayor nor any Council member can be appointed to the TDA board.

The board must have unequivocal oversight over staff activities. Dual reporting structures to the board and the Mayor are inadvisable.

** When a Title 60 entity merges into another, in legal terms it is dissolved. This is true even if the mission, tools, and/or staff are integrated into the receiving entity.*

Legal Counsel: Leslie V. Batchelor and Jeff Sabin, Center for Economic Development Law

There are legally permissible ways for the City to reconfigure its economic development functions without running afoul of State statutory requirements.

Other Oklahoma municipalities have adopted more unified and centralized structures for their Title 60 and Title 11 entities.

Precedent | Oklahoma City, OK



OKC Urban Renewal
Authority
(Title 11)

OKC Redevelopment
Authority
(Title 60)

How OKC consolidated its Title 11 & Title 60 entities:

- The Title 11 and Title 60 entities share board members, with the limitation that none of the dual appointment seats can be held by City Council members.
- All Title 11 and Title 60 activities are managed by a single Executive Director and supporting staff.
- Staff are employed by the Alliance, a non-profit that was created solely for that purpose and which contracts with the City.
- Though the Title 11 and Title 60 entities remain separate entities in legal terms, in practice the Alliance operates as a seamless entity, able to leverage both public trusts' resources and powers as appropriate to accomplish a single overarching mission.

Structure & Governance | Recommendations

5. The City should consolidate the majority of its economic development functions into a single economic development entity (EDE).
6. The EDE should be governed by a single independent board, with 5 EDE board members holding synchronous appointments on the TDA board.
7. In aggregate, the EDE Board should encompass a mix of relevant skillsets and reflect the racial, ethnic, and gender diversity of Tulsa.
8. To ensure a diverse pipeline of future board members, the Mayor should employ robust nomination and ongoing recruitment processes.
9. A comprehensive, user-friendly onboarding curriculum should be assembled and shared with all incoming EDE Board members and new staff.
10. A management agreement should be put in place to enhance accountability to Tulsa taxpayers.

Single Entity | HR&A prototyped several alternative organizational structures and sought feedback from City staff, Authority board members, and elected officials.

Organizational Realignment Options Considered*

- | | |
|---|--|
| 1. Communication Improvements
<i>No structural change</i> | 5. Entity Dissolution
<i>Entities with missions out of sync with City's long-term priorities dissolved and debt retired</i> |
| 2. Consolidate Duplicative Staff Tasks
<i>Duplicative tasks merged or outsourced</i> | 6. Joint City/Authority Executive Director
<i>Authority Executive Director integrated into Mayoral Administration as a Department Head equivalent</i> |
| 3. Shared Staff
<i>All staffing needs met by shared talent pool</i> | 7. Maximum Consolidation
<i>Full merger with shared board and shared staff</i> |
| 4. Shared Board Members
<i>Same individuals serve on all entity boards</i> | |

*not mutually exclusive

Criteria for Evaluation

- | | |
|--|--|
| <ul style="list-style-type: none">• Coherent reporting structure with strong leadership• Coordinated approach to carrying out City's economic development mission• Improved operational efficiency• Enhanced accountability and transparency• Centralized community engagement | <ul style="list-style-type: none">• Conducive to a more strategic approach to managing the City's economic development assets and resources• Greater opportunities for Board members to exercise creativity and impact Tulsans.• An organization that withstands political turnover and turbulence |
|--|--|

Single Entity | Prototypes were discarded for a variety of reasons, ranging from impracticable to insufficiently bold.

Organizational Realignment Option	Determination
Communication Improvements	Not recommended <ul style="list-style-type: none"> Unlikely to produce substantial operational improvement Unlikely to withstand staff and leadership turnover
Consolidate Duplicative Staff Tasks	Not recommended <ul style="list-style-type: none"> Unlikely to produce substantial operational improvement
Shared Staff	Recommended <ul style="list-style-type: none"> Positions the City to recruit high caliber staff, capable of conceptualizing and executing bold innovations. increasing capacity to meet ambitious goal
Shared Board Members	Recommended <ul style="list-style-type: none"> Lockstep coordination between entities
Entity Dissolution	Recommended in part (TIA, EDC, and TPA to merge; TPA, EDC dissolved) <ul style="list-style-type: none"> Consolidation under one umbrella breeds greater coordination TDA cannot merge as Title 11 entity TPFA has complex agreements with the City, will undergo further study
Joint City/Authority Executive Director	Not recommended <ul style="list-style-type: none"> A dual reporting chain – to both the board and the Mayor – could breed confusion if not conflict
Maximum Consolidation	Not recommended: contrary to statutory requirements <ul style="list-style-type: none"> OK statute prohibits Title 11 entities from merging with Title 60 entities.
All board seats are allocated to City Councilors	Not recommended: contrary to statutory requirements <ul style="list-style-type: none"> OK statutes prohibit Councilors from serving on boards for Urban Renewal Agencies
All Title 60 board seats are allocated to City Councilors	Not recommended with Tulsa Strong Mayor-Council form of government. <ul style="list-style-type: none"> Common structure for Oklahoma municipalities with a City Manager form of government
ABCs staffed out of MOED, led by MOED leadership, and board is advisory body	Not recommended: contrary to statutory requirements <ul style="list-style-type: none"> City susceptible to lawsuits

Single Entity | The City should consolidate most of its economic development operations into a single, independent entity.

Rationale for Consolidation:

- Coherent and aligned reporting structure
- Streamlines number of actors within the landscape
- Easier to identify decision-makers and monitor decision-making, increasing transparency
- Unifies approach to community engagement
- Elimination of duplicative meetings, reports, and other activities frees up staff capacity for high-impact projects
- Operational synergies and efficiencies are more readily identified and operationalized
- Enables decision-makers to adopt a more strategic, overarching approach to managing the City's economic development assets and resources.

Having the future entity exist outside of City Hall helps to ensure:

- Continuity across mayoral administrations
- Insulated from short-term political turbulence
- Access to a breadth of expertise and on-the-ground experience not otherwise available
- Greater flexibility in staff recruitment

Single Entity | This consolidation should encompass all entities under review with the exception of TPFA.

The nature of TPFA's agreements with the City are complex.

The primary vehicle for of the City's revenue-backed bonding needs, TPFA has a relationship with City government unlike that of Tulsa's other Authorities. Many of TPFA's activities, such as the issuance of revenue-backed bonds for stormwater investments or the refurbishment of One Tech Center, are driven by municipal finance needs rather than overarching economic development goals.

As a result, TPFA's debt is difficult to retire.

TPFA's debt service is funded by reoccurring revenues, such as utility fees, tenancy payments, or other long term contractual obligations. To retire the debt early, the City would have to expend unrestricted reserve funds – an unattractive option given competing demands for these reserves.

The City should retain TPFA as a standalone Authority and transition select functions to the newly consolidated economic development entity.

TPFA roles and responsibilities most closely aligned with economic development (downtown activation, tourism, the Convention Center, etc.) should move over to the new EDE. This will allow TPFA to transition to a more straightforward if circumscribed role as a bonding vehicle for the City.

EDE Board | The consolidated economic development entity (EDE) should be governed by a single independent board.

Rationale for a single board:

- **Comprehensive oversight** of the city's economic development resources, investments, and initiatives
- Easier for outside stakeholders to **identify decision-makers**
- Can establish a **single, coordinated approach to external engagement** with potential partners and targeted beneficiaries alike
- Greater civic impact enhances ability to **recruit strong board members**
- **Consistent protocols** across board activities
- Streamlined decision-making

EDE Board | Determining the appropriate board size balances the need for racial, gender, and skillset diversity with an agile and creative board composition.

HR&A strongly recommends that board consolidation entail a **reduction in total seats**.

A more manageable board size will:

- promote bold, agile thinking
- encourage creative dialogue
- streamline decision-making
- ease scheduling challenges
- offer board members a more satisfying and meaningful service experience.

However, the consolidated board should remain large enough to ensure:

- a diversity of skillsets and perspectives – including racial and gender diversity
- manageable workload for individual board members.

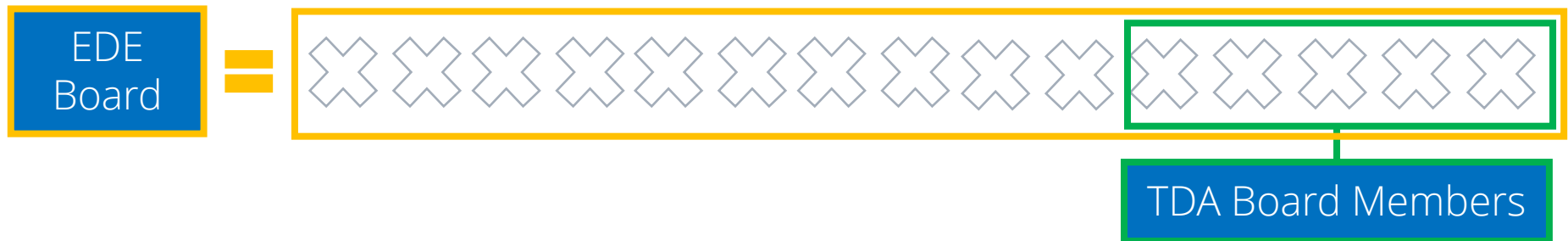
At present, an aggregate total of 34 board members oversee the five economic development entities under review.

Entity	Current No. of Board Members
EDC	11
TDA	5
TIA	8
TPA	5
TPFA	5
TOTAL	34

Based on input from City staff, current board members, and elected officials, **the future EDE board should be composed of 12-15 members**, reducing the current number of decision-makers by more than half.

All stakeholders underscored the crucial importance of **racial, gender, and skillset diversity** among EDE decision-makers and expressed a preference for structural guardrails to guarantee that future appointments conform to these diversity goals.

EDE Board | To comply with statutory requirements, five members of the EDE board should hold synchronous appointments to the TDA board.



As a reminder, a Title 11 board (TDA) cannot merge with a Title 60 board (EDE). Under the proposed approach, TDA Board members will fully participate in EDE decision-making and meet separately to conduct TDA business.

Rationale for joint board appointments:

- Lock-step coordination between EDE and TDA
- Aligned documentation, processes, and protocols throughout the ecosystem
- Transparency and information sharing

Board Terms:

- State statute sets TDA board terms at **3 years**.
- To facilitate alignment between the EDE and TDA Boards, **all board members should serve staggered 3-year terms**.
- Under this proposal, each board seat will come up for reappointment during a single Mayoral term, **strengthening the link between Tulsa voters and the City's economic development decision-makers**.

EDE Board | In aggregate, the EDE Board should encompass a mix of skillsets and experiences.

Given the magnitude of the EDE's mission, its board will need to be equipped with a broad range of expertise and backgrounds.

Potential Board Member Competencies



Commercial development



Project finance



Community/neighborhood advocacy



Racial justice advocacy



Construction



Residential development



Human capital/talent development



Regional collaboration



Legal experience



Small business/entrepreneurship



Minority/Women-owned business

EDE Board | The Steering and Working Committees considered various mechanisms for how to ensure racial, gender, and skillset diversity on the EDE Board.



Designated seats by demographics

Determination

- A **static** reflection of Tulsa's racial composition in 2020
- **Proportional representation impracticable** without a larger board
- Reminiscent of affirmative action and **likely objectionable** to board recruits

City of Tulsa

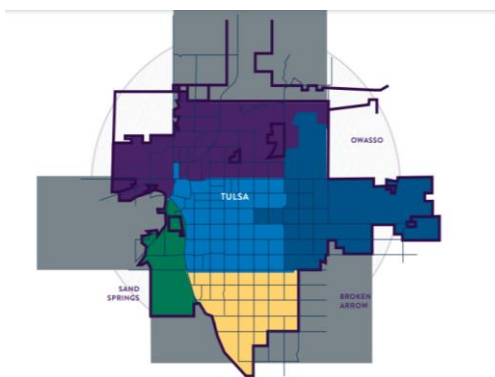
White*	54%
Hispanic or Latino	16%
Black or African American	15%
American Indian/Alaska Native	4%
Asian	3%
Two or More Races	8%

Female 52%

*White here refers to white alone, not of Hispanic or Latino ethnicity.



Designated seats by neighborhood



City of Tulsa

64% White
15% Black

North Tulsa

42% White
35% Black

Determination

- Given the current and shifting demographics of Tulsa's neighborhoods, **diverse geographic representation will not necessarily lead to diverse racial, ethnic, or gender representation.**



Designated seats by Council district

Determination

- Given the current and shifting demographics of Tulsa's Council districts, **diverse geographic representation will not necessarily lead to diverse racial, ethnic, or gender representation.**
- The decentralization of nomination responsibilities to Council members will **impair an overarching, holistic approach to board composition.**
- The transference of nomination responsibilities from the Mayor's office to Council members would be a **potent and politically complicated precedent.**

EDE Board | In lieu of designated seats, HR&A recommends that the City embed its commitment to board diversity into the appointee recruitment and nomination processes.

We recognize that it will take intentionality to ensure that qualified candidates from diverse backgrounds are considered, nominated, and confirmed. We believe that the most effective way to operationalize intentionality is through new organizational norms.

Pipeline Development

- **Expand and diversify** the network of potential board candidates.
- **Expand the board search beyond customary board recruitment networks.** Possibilities include outreach to the Hispanic Chamber, TYPROS' "Get on Board," and the Lead Tulsa Academy.
- The Mayor's staff should make a **good faith effort to recruit talent without connections** to City Hall.
- Make proactive efforts to cast a wider net and signal the **welcoming of diverse perspectives and experiences** on the Board.
- The City should **not allow the use of self-nomination applications for open EDE board seats**, as this tactic is a known barrier to participation beyond the "usual suspects."
- The City should **network through community organizations**, their volunteer networks, or with leaders in the current or past client community. Relying on the personal networks of current board members to identify new board candidates will continue to produce similar board representation.

Appointments

- Following board consultation, the EDE Executive Director should transmit a memorandum to the Mayor's Office outlining the **current skills, competencies, and demographic gaps** in the EDE board's current composition.
- **Reasonable notice and a clear deadline** must be given to the EDE Executive Director, EDE Board, community outreach staff, the Mayor's Office of Resilience and Equity, and Councilmembers, should they wish to include individuals on the nominee shortlist for the Mayor's consideration.
- The City should **reconsider the use of written applications**, as City Councilors should be reminded of the entity's diversity goals before any board members are approved.

Formalizing new norms

- The City's commitment to board diversity should be clearly and unequivocally **codified in the EDE indenture documents**. Mayor's Office and City Council must demonstrate **good faith effort** to ensure that the Board composition accurately reflect the demographic makeup of the City of Tulsa.

EDE Board | Unlike prescriptive mechanisms, procedural upgrades encourage a more holistic, thoughtful, and adaptable approach to board member selection.

Promising board recruits bring more than just the sum of their parts. Their potential added value to the Board mix should be considered in its full complexity.

Sample profile:

Infrastructure specialist

Who they might be:

- A civil engineer
- A finance professional

What they bring:

- Understanding of infrastructure and financing needs to deliver complex projects

Possible Competencies:

- Capital construction
- Project finance
- Residential/commercial development

Sample profile:

Racial equity advocate

Who they might be:

- Community leader of a historically marginalized population

What they bring:

- A finger on the community's pulse
- A credible spokesperson

Possible Competencies:

- Racial justice advocacy
- Community/Neighborhood development
- MWBE

Sample profile:

Tulsa power broker

Who they might be:

- Influential business leader
- Involved in the civic space or the foundation world

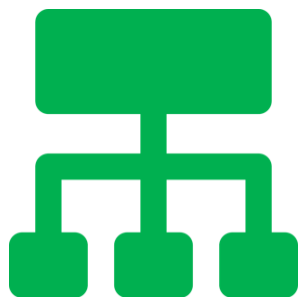
What they bring:

- Business knowledge
- Cross-sector connections

Possible Competencies:

- Regional collaboration
- Legal experience
- Talent development

EDE Board | Develop a single, aggregated onboarding curriculum for new board members.



Entity

- History, mission, and values
- Trust indenture, bylaws, powers, staff, and management agreement
- Duties of the board



Economic Development Ecosystem

- Other entities in the economic development ecosystem
- Current projects underway throughout the City
- Available incentives, TIF districts, commercial corridors, etc.
- Relevant Tulsa history including special emphasis on Black Wall Street and the Tulsa Race Massacre, and current economic inequities present within Tulsa's population



Skills

- Tutorial for each member to establish base competency, no matter their background.
- Diversity and Inclusion training tailored to Tulsa's diverse communities

Accountability | Though independent, the EDE Board must nonetheless be held accountable to Tulsans for how it deploys taxpayer resources.

The advantages of independent board structures are numerous -- insulation from short-term political turbulence; leveraging the creativity and credibility of Tulsa's thought leaders; etc. This independence is achieved by design: Public Trust board members are not public employees, are not integrated into a reporting structure overseen by the Mayor or City Council and are not subject to voter approval.

That said, these unelected decision-makers oversee the allocation of significant public resources, investments, and assets.

Oklahoma State statute requires baseline transparency measures, including annual fiscal audits, open meeting requirements, and open records access.

HR&A recommends that the City take the additional step of developing a formal management agreement and hold the EDE staff and board accountable for its fulfillment.

Basic features of a management agreement between a municipality and a Public Trust

1. A contract establishes the **roles and responsibilities** that form the basis of the relationship between the City and the Public Trust.
2. Agreements cover a fixed time frame and **set the priorities, resource allocation, and performance expectations** for that time period.
3. Agreements can be amended should specific projects or initiatives arise.
4. The Public Trust's **use of City employees** -- whether on a full time, part-time, or task-specific basis -- is explicitly stated.
5. **Clear reporting requirements** that specify cadence (annual reports at minimum), content, and audience.

Accountability | Management agreements clarify the expectations, roles, and responsibilities of an external entity acting on behalf of the City.

Municipal governments commonly use management agreements to stipulate how an external entity will manage certain activities on its behalf, such as:

- **economic development services** (e.g. business attraction and retention, small business assistance),
- **redevelopment services** (e.g. land acquisition and redevelopment, infrastructure financing, façade improvement programs, etc.), and
- **administration and management of particular grants and programs** (e.g. federal brownfield revolving loan funds on behalf of the city).

Precedent | Oklahoma City, OK

The Management agreement stipulates the Oklahoma City Alliance will be an economic development service provider only, and not exercise policy functions, which will remain with the City Council and governing bodies of agencies served by the Alliance.

The management agreement for the OKC Alliance specifies employees and positions designated by the City Manager and the Municipal Counselor as “city provided employees” to work with the Alliance during that fiscal year. In the past, they have included an economic development program manager, administrative specialist, and assistant planning director.



Accountability | Management agreements should be amended annually to reflect updates in resource availability and performance expectations.

Precedent | Atlanta, GA

The relationship between the City of Atlanta and Invest Atlanta is governed by intergovernmental agreements that specify roles, responsibilities, and goals.



Using high-level IGAs as a framework, Invest Atlanta submits a detailed **annual** budget request to the City.

Requests are tied to **clear metrics, targets, work products, and staffing/operational requirements**, and typically provide a summary of progress to date on targets outlined in the prior year's budget request.

FUNDS & ASSETS



SUMMARY



Are resources and assets deployed, managed, allocated, and communicated effectively?

Findings

Give that each entity under study manages its funds and assets independently, it's difficult to fully ascertain the full extent of economic assets, resources, investments, and activities across the city.

Current reporting conventions offer insufficient transparency or insight into how public dollars are deployed for economic development purposes. Furthermore, siloed resource allocation serve the best interests of individual authorities but may not represent the most impactful use of the City's economic development resources overall. In particular, the Authorities' real estate portfolio could be managed and curated more strategically, in ways that more tangibly advance the City's overall economic development mission.

Recommendations

The City should structure a clearer understanding of its economic development activities and consolidate the funds and assets dedicated to economic development under the new EDE. Doing so can better position the EDE to strategically deploy those resources to drive programs and projects toward mission-driven, equity-focused goals.

11. The City Finance Department should track all public dollars deployed for economic development purposes, integrating these revenues and transfers as standard components of the annual budget process.
12. The EDE should launch a strategic review of the consolidated asset portfolio, culminating in mission-centered disposition goals and timeline.

Funds & Assets | Findings

7. Current reporting conventions offer insufficient transparency or insight into how public dollars are deployed for economic development purposes.
8. Siloed resource allocation serve the best interests of individual authorities but may not represent the most impactful use of the City's economic development resources overall.
9. The Authorities' real estate portfolio could be managed and curated more strategically, in ways that more tangibly advance the City's overall economic development mission.

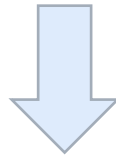
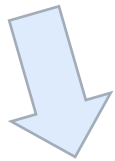
Current reporting conventions offer insufficient transparency or insight into how public dollars are deployed for economic development purposes.

Unlike City departments, the Authorities' financial activities are not all reported in the City budget.

Special revenue funds – including those that collect sales tax and hotel/motel tax, which fund many economic development activities – do not break out the different amounts transferred to various recipients.

Individual Authorities' accounting practices and reporting templates are not readily comparable or easily aggregated.

Conduit debt is not recorded on Authority balance sheets, effacing the Authorities' true impact.



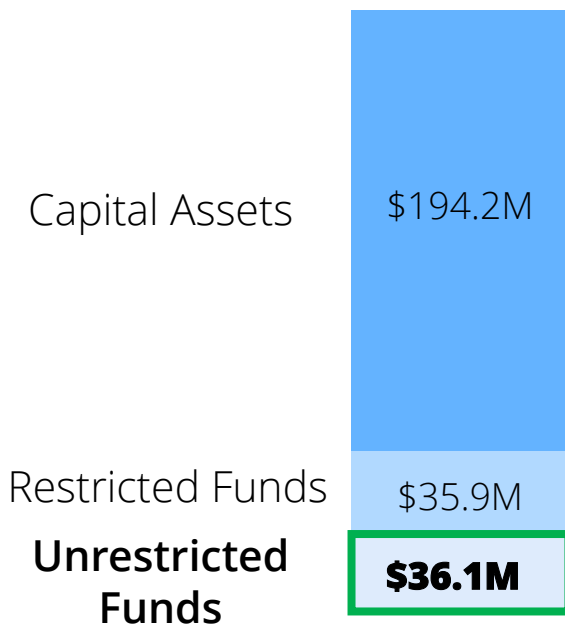
Any decision-maker wishing to understand taxpayers' aggregate contributions towards the City economic development activities, as well as fluctuations over time, would have to work with the City Controller to pull custom accounting reports.



Absent ready access to comprehensive funding data, the **existing reporting system reinforces siloes, limits transparency, and inhibits oversight and accountability.**

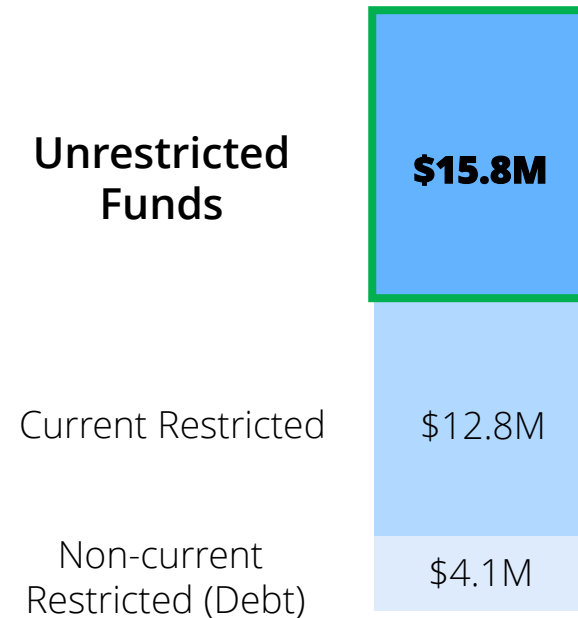
Siloed resource allocation decisions may not represent the most impactful use of the City's economic development resources overall.

Total Net Position: \$266M



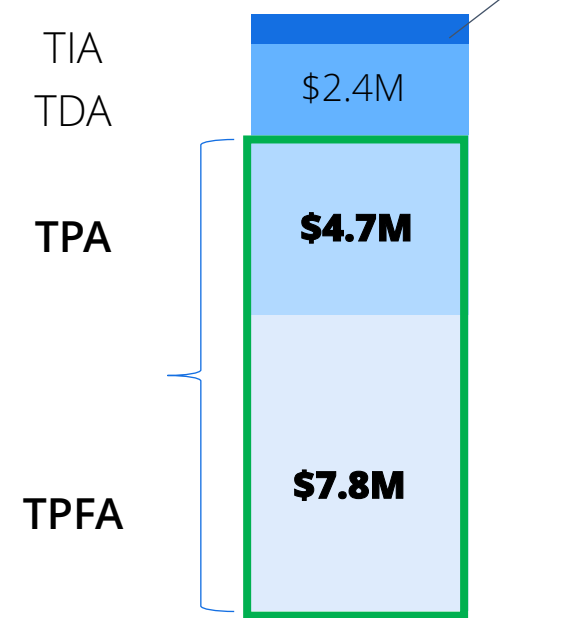
Outside of capital assets or restricted funds, the authorities collectively have **\$36M** in unrestricted assets.

Cash and Cash Equivalents: \$32.7M



Almost half of the authorities' aggregate cash is unrestricted and readily accessible – **\$15.8M** that could be invested elsewhere.

Cash and Cash Equivalents, by Authority



The Authorities' real estate portfolio could be managed and curated more strategically, in ways that more tangibly advance the City's overall economic development mission.

TDA	TPA	TPFA	TIA
<p>190+ parcels* ~50 acres* 90%+ of TDA's acreage is in N. Tulsa*</p> <p>*as of 2/20/20</p>	<p>1 surface lot 5 parking structures** 100% of assets located in the downtown</p> <p>**Civic Center Parkade and Underground as one</p>	<p>BOK Arena Cox Convention Center One Tech Center</p>	<p>Guthrie Green Park Geothermal Well Airport Hangar 80***</p> <p>***lease recently renegotiated at market rate</p>
<p>TDA owns a plethora of vacant and underutilized spaces in North Tulsa, which await new home construction.</p>	<p>TPA controls valuable downtown sites that could be leveraged for economic benefits in addition to parking.</p>	<p>Management agreements for Cox and BOK Center present opportunity to evaluate economic impact of the City's largest entertainment and tourism venues.</p>	<p>Hangar historically leased at no cost to tenant.</p>

Note: The City of Tulsa has historically negotiated leases on behalf of TPFA and TIA and presented lease terms for board approval. These leases have historically prioritized incentivizing economic development efforts, but lacked key elements of consideration and accountability.

Funds & Assets | Recommendations

11. The City Finance Department should track all public dollars deployed for economic development purposes, integrating these revenues and transfers as standard components of the annual budget process.
12. The EDE should launch a strategic review of the consolidated asset portfolio, culminating in mission-centered disposition goals and timeline.

As a standard component of the annual budget process, the City Finance Department should track all municipal dollars deployed for economic development purposes.

These reports should encompass all City revenues, expenditures, assets, and debt related to economic development, including but not limited to transfers to the EDE.

Economic Development Resources: Preliminary List of Funds based on FY20 Budget

- EDC (Fund 130)
- One Tech Center (Fund 550),
- Convention & Visitors Fund (Fund 131),
- PAC Fund (Fund 132),
- WIN (Funds 2000 - 2003),
- Whittier Square Improvement District (Fund 142),
- Stadium Improvement District Fund (Fund 141)
- Economic Development Infrastructure Fund,
- General Fund allocations to MOED and MOCDP
- Downtown Coordinating Council transfers
- Operating budgets for TIA, TDA, TPA, TPFA,
- Destination Districts/Main St. programs,

Special revenue funds reporting should include amounts transferred to recipient organizations.

Conduit debt issued for economic development purposes should be recorded.

Launch a strategic review of the consolidated asset portfolio, culminating in mission-centered management and disposition goals and timeline.

Review all lease terms for market competitiveness and determine whether any below-market subsidy is in-line with the public value of the mission-aligned tenancy.

When determining whether to retain a lease-paying asset to fund operations, determine both the opportunity cost in foregone municipal tax revenue and the degree to which its current use is mission-aligned.

Categorize every real estate asset as:

- Surplus ready for disposal
- Better utilization likely – pursue options
- Major investment required
- Long Term development – retain for future sale
- Appropriate as is

Lease revenues should fund ongoing program offerings, while one-time revenue from land disposition should be reserved for mission-centered capital investments.

The consolidated EDE should strategically employ its assets – real estate and otherwise – in service of financial sustainability and furthering an Urban Wealth Fund Model.

Prosper Portland is **held accountable** to both its key objectives and must continue to be a **financially sustainable** organization.

Precedent | Portland, OR

Faced with a projected reduction in TIF revenues, Prosper Portland engaged in a **financial sustainability planning process** to identify potential sources of revenue moving forward. Key components include:

- optimizing real estate holdings
- maximizing fee revenue
- increasing partnerships with other public agencies to capitalize on real estate expertise
- securing more public funding.



Building an Equitable Economy

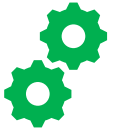
Prosper Portland **releases status reports on progress** towards its goals. In the report from January 2019, it found that of 18 key objectives, 5 were ahead of schedule, 8 were on track, and 5 were difficult to measure due to a discontinued or unavailable data source.

The Urban Wealth Fund model, proposed by Dag Detter and Stefan Fölster in their book “The Public Wealth of Cities,” is a framework to manage a city’s assets – particularly real estate assets – to maximize returns and generate revenue and public funding.

OPERATIONAL EFFICIENCIES



SUMMARY



Are staff appropriately skilled and resourced to perform tasks at hand?

Are internal processes and procedures well-suited to their purposes and efficiently carried out?

Findings

Outside of the City departments, there are few full-time entity staff carrying out day-to-day economic development operations.

Despite the presence of some very talented staff, resources are limited and largely monopolized by procedural tasks, leaving little bandwidth for nimble or proactive initiatives. Inconsistent process documentation, performance monitoring, and use of decision-making criteria hinder transparency, accountability, and succession planning. Fortunately, there are already systems in place that allow experienced City staff to provide specialized support to other Tulsa Authorities.

Recommendations

The EDE should reflect a new unified staffing structure, offering an opportunity to strengthen operational efficiencies and focus the organization on its core mission.

13. The EDE should execute its activities using a shared staffing configuration.
14. Using TARE and TMUA as models, the EDE management agreement should allocate responsibilities for procedural tasks to those best positioned for efficient and cost-effective execution, be they EDE staff, City departments, or third-party contractors.
15. EDE staff should document standard operating procedures for all multi-step procedural workstreams that remain EDE responsibilities, such as land disposition, RFP issuance, or contract compliance oversight.
16. The EDE should embed the City's economic development mission statement into its staff roles and functions, clearly aligning job descriptions and specialized skillsets with overarching priorities.
17. The EDE should develop standardized decision-making guides or checklists to test the extent to which a particular investment opportunity aligns with the entity's broader mission and objectives.

Operational Efficiencies | Findings

- 10. Staff resources are limited and largely monopolized by procedural tasks, leaving little bandwidth for nimble or proactive initiatives.
- 11. Inconsistent process documentation, performance monitoring, and use of decision-making criteria hinder transparency, accountability, and succession planning.
- 12. There are already systems in place that allow experienced City staff to provide specialized support to other Tulsa Authorities.

Entity staff devote significant time to procedural tasks, many executed more efficiently by specialized staff in other City departments.

Entity staff and decision-makers devote most of their day-to-day time to asset management, legal, and finance activities – tasks which are in many cases duplicative or undertaken more efficiently by specialized City staff and other departments.

ASSET MANAGEMENT TASKS

- Facility capital needs determination
- Oversight of maintenance contractors

LEGAL TASKS

- Development agreement and contract execution
- Bond and TIF proposal legal review
- Bond issuance
- TIF proposal administrative review
- Lease approvals

FINANCE TASKS

- Solicitation issuance
- Fund disbursements
- Grant administration
- Contract management
- Billing and Collections
- Accounting
- Purchasing
- Budget

Source: FY2019 CAFR; staff and board member interviews

The Authorities currently struggle with limited human resources, making do with expensive outside contractors and gaps in staff expertise.

There is also a lack of succession planning and established processes to retain institutional knowledge when influential leaders or long-term leave.

Organization	Full-Time Staff	Part-Time Staff	Contractors*	Volunteer Board Members
EDC	0	0	0	11
TDA	2	1	2	5
TIA	0	0	5	8
TPA	1	0	2	5
TPFA	0	0	3	5
Total	3	1	5	34

Nancy Roberts, TDA Board Chair, is Volunteer Interim Executive Director

Jim Coles serves as Executive Director; various MOED staff support TIF implementation

Source: FY2019 CAFR, Internal Documents

*Includes legal contractors and use of City employees

Because procedural tasks tie up staff resources, there is limited capacity to execute proactive, nimble, and creative interventions.

Interviewees and outside stakeholders raised several potentially game-changing economic development initiatives that, in different circumstances, they would like to see the boards consider. Unfortunately, these innovations would exceed the bandwidth and expertise of current staff and board members.

Bold Economic Development Ideas



Proactively deploy TIF districts in transforming areas; use the funds for anti-displacement measures.



Foster a pipeline of small business and M/WBE contractors through inclusive procurement practices.



Create a Citizen Input Group – a standing iteration of TDA's 2020 pilot – to foster deeper ongoing community dialogue.

Launch a bold marketing push to place single-family TDA parcels in the hands of local home builders, with a preference for M/WBE firms.



Convert select real estate assets into a land bank, thereby guaranteeing a long-term supply of affordable housing or affordable commercial space neighborhoods at risk for gentrification.



Source: FY2019 CAFR

Inconsistent use of decision-making criteria, process documentation, and performance monitoring hinder transparency, accountability, and succession planning.

Decision-makers' ability to be strategic and forward-thinking is limited by inconsistent use of operations management tools.



No established
performance
objectives



No process
checklists



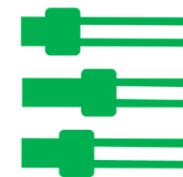
Strategy documents
not translated into
operations objectives



No evaluation criteria
to guide investment
decision-making



No tracking or
reporting of
outcomes



No baseline
requirements for
incentive eligibility

There are already systems in place that allow experienced City staff to provide specialized support to other Tulsa Authorities.

Tulsa Authority for the Recovery of Energy (TARE)

Tulsa Metropolitan Utility Authority (TMUA)

Operations Staffing

10-year trash & recycling hauling contract

COT Water & Sewer Department
COT Engineering Services Department

Specialized Staffing Support

COT Finance Department

- Billing & Collections
- Fleet Management
- Accounting
- Purchasing
- Budget

COT Customer Care Dept.

- Utilities Call Center
- COT Human Resources Dept.**
- Training & Professional Development
- COT IT**
COT Legal

Indirect costs charged to Authority

1.84% of FY20 Authority operating budget

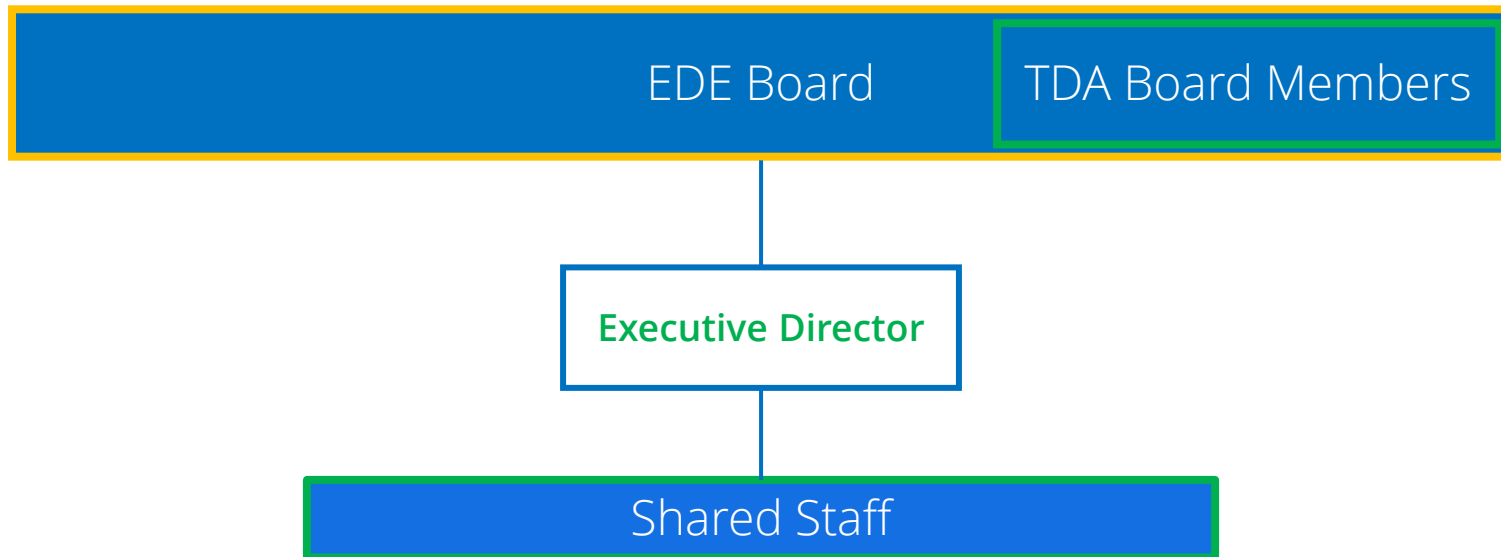
2.4% of FY20 Authority operating budget

Source: FY2021 Indirect Cost Plan – Enterprise Funds

Operational Efficiencies | Recommendations

13. The EDE should execute its activities using a shared staffing configuration.
14. Using TARE and TMUA as models, the EDE management agreement should allocate responsibilities for procedural tasks to those best positioned for efficient and cost-effective execution, be they EDE staff, City departments, or third-party contractors.
15. EDE staff should document standard operating procedures for all multi-step procedural workstreams that remain EDE responsibilities, such as land disposition, RFP issuance, or contract compliance oversight.
16. The EDE should embed the City's economic development mission statement into its staff roles and functions, clearly aligning job descriptions and specialized skillsets with overarching priorities.
17. The EDE should develop standardized decision-making guides or checklists to test the extent to which a particular investment opportunity aligns with the entity's broader mission and objectives.

The EDE should execute its activities using a shared staffing configuration, with a strong Executive Director position.



- Parallel reporting lines mask duplication, breed confusion, and obscure opportunities for innovation.
- A shared staffing structure does not preclude the use of third-party contractors or City staff, but does require a shift away from ad hoc assistance and towards clearly defined responsibilities governed by a contract or management agreement.
- Unlike volunteer board members, a full-time Executive Director can pivot staff activities in response to sudden opportunities and identify technical skill gaps that, if filled, would increase effectiveness and further **relieve the board's workload**.
- **A unified approach to resource use and asset management** allows authorities to better leverage the real estate portfolio.

Using TARE and TMUA as models, specialized procedural tasks should be assigned to those best positioned for efficient and cost-effective execution.

The City should review the necessity for third party consultant services in cases where City staff have the skills necessary to execute those tasks or the City contracts with third party entities to perform similar services.

Tasks that City staff or outside contractors might be able to execute more efficiently than EDE staff

- Contract management
- Asset management
- Grant management
- Loan processing
- Billing and collections
- Bond issuance
- Accounting
- Purchasing
- Budget report generation
- Payroll processing
- Staff benefits management
- Contract review
- IT upkeep
- Website maintenance
- Referrals from COT Customer Care Dept.

EDE staff should document standard operating procedures for all multi-step procedural workstreams that remain EDE responsibilities.

Examples might include land disposition, RFP issuance, or contract compliance monitoring. The documentation will clarify roles and responsibilities, allow staff to more accurately estimate implementation time frames, and uncover unnecessarily cumbersome roadblocks.



Commonly undertaken, multi-step **processes should be mapped out and standardized** to eliminate duplication and inefficient steps.

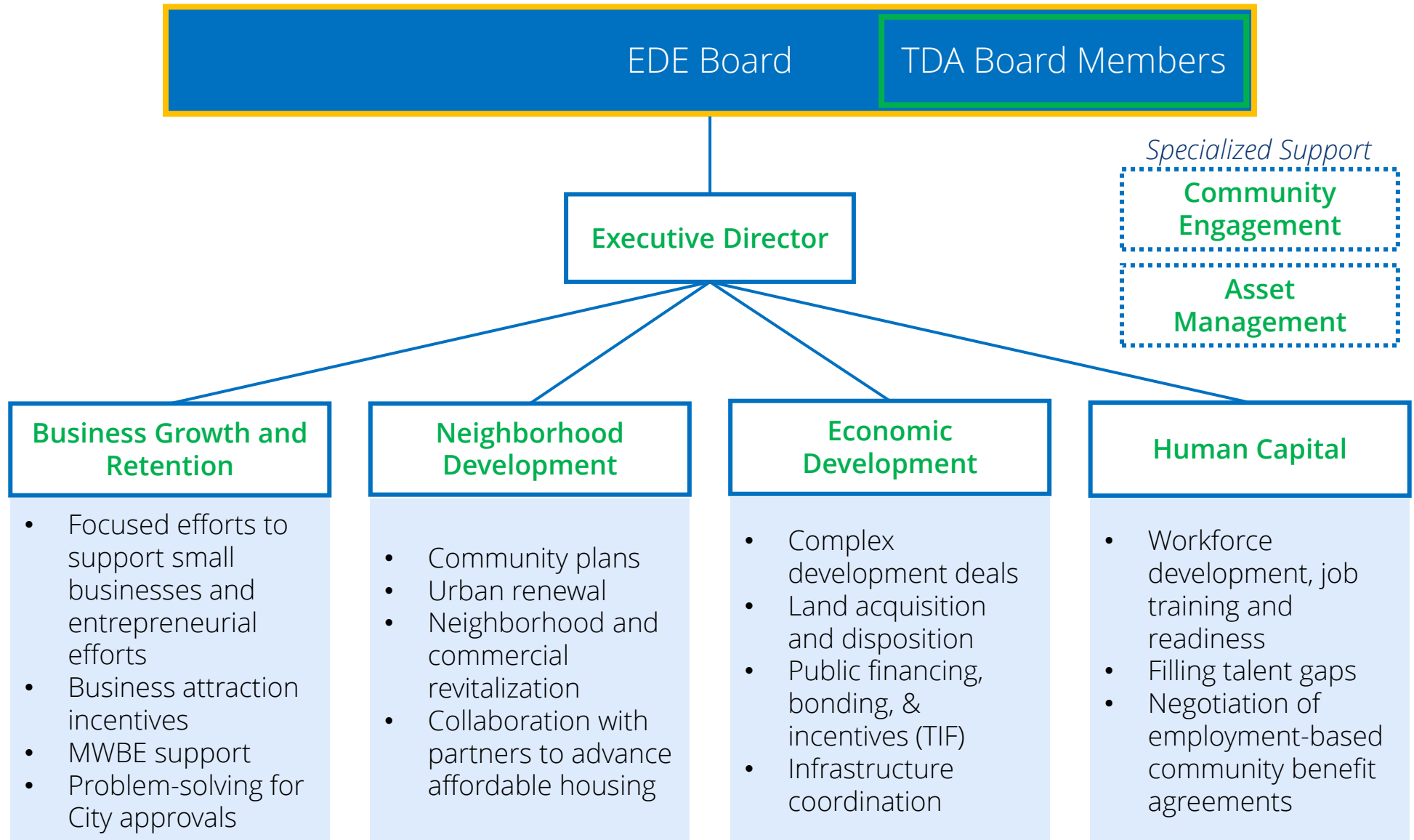


As staff turn over, there are procedures in place to **transfer institutional knowledge and onboard** new staff members.



Standard operating procedures should be **consistently revisited** to incorporate new technologies and efficiencies.

The EDE should embed the City's economic development mission statement into its organizational chart.



The EDE should develop job descriptions and recruit for the skillsets needed to achieve its performance goals.

Business Growth and Retention

- Focused efforts to support small businesses and entrepreneurial efforts
- Business attraction incentives
- MWBE support
- Problem-solving for City approvals

Neighborhood Development

- Community plans
- Urban renewal
- Neighborhood revitalization
- Collaboration with partners to advance affordable housing

Economic Development

- Complex development deals
- Land acquisition and disposition
- Public financing, bonding, & incentives (TIF)
- Infrastructure coordination

Human Capital

- Workforce development, job training and readiness
- Filling talent gaps.
- Negotiation of employment-based community benefit agreements.

Mission-aligned Activities

Corresponding Skillsets

- Business development
- Marketing and communication
- Understanding of talent pipelines
- Understanding of B2B supply chains

- Strategy & long-term planning
- Housing development
- Blight abatement
- Anti-displacement
- Commercial corridors

- Commercial real estate
- Capital construction
- Commercial corridors
- Incentives options
- TIF districts
- Bond issuance

- Grant making and loan processing
- Talent pipelines
- Career ladders
- Incentives negotiation
- Partnership curation

Each Service Area will partner closely with civic actors throughout Tulsa's economic development ecosystem.

Business Growth and Retention

- Tulsa's multiple Chambers
- Small business incubators
- Oklahoma Manufacturing Alliance
- Oklahoma Department of Commerce
- Tulsa Innovation Labs
- 36 Degrees North
- Local Tribes

Neighborhood Development

- WIN
- Tulsa Housing Authority
- Home builders
- Affordable housing developers
- Neighborhood groups
- Tulsa Urban Land Institute
- Leadership Tulsa
- Growing Together
- INCOG
- Commercial associations
- Local Tribes

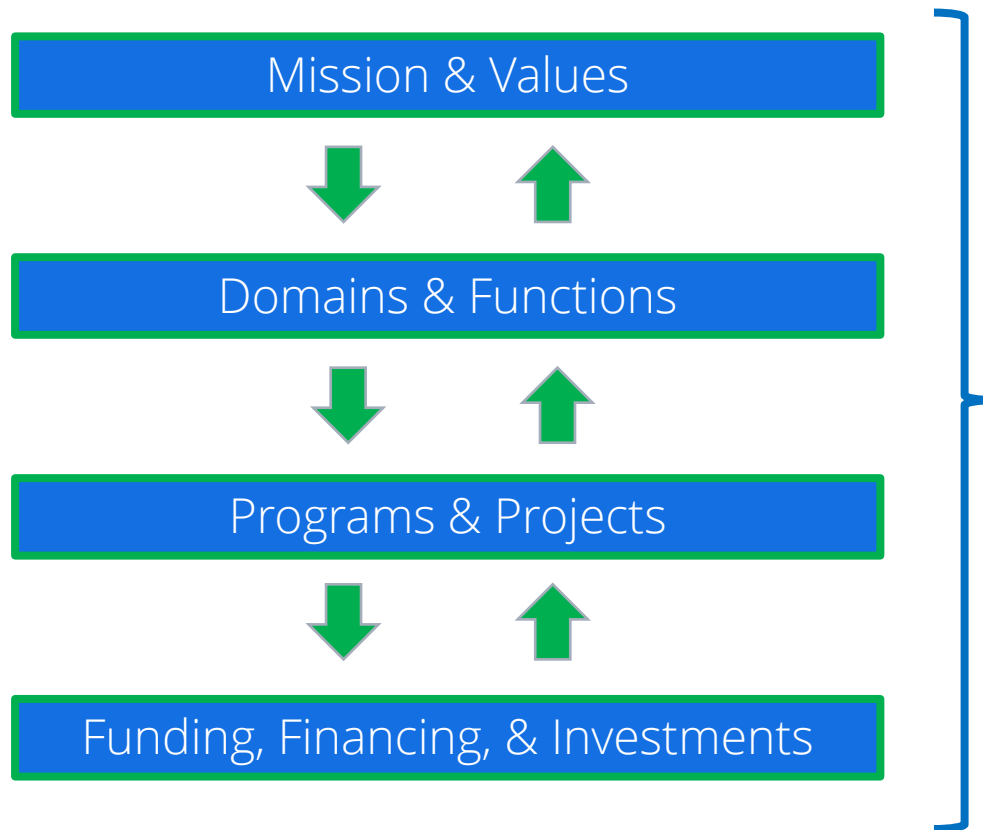
Economic Development

- Downtown Coordinating Council
- Major employers
- Small businesses
- Tulsa's multiple Chambers
- Commercial real estate developers
- Local Tribes

Human Capital

- Tulsa's regional colleges and universities
- TYPROS
- Tulsa's multiple Chambers
- Foundation for Tulsa Schools
- Workforce agencies
- Tulsa Public Schools
- Impact Tulsa
- Local Tribes

The EDE should develop standardized decision-making guides or checklists to test a particular investment opportunity for mission-alignment.



Decision-making guide

- The consolidated EDE should be able to tie all investment decisions back to the entity's mission and vision.
- The entity should develop criteria to grade possible investment options against to inform decisions.

PARTNERSHIPS & EXTERNAL ENGAGEMENT



SUMMARY



How well is the organization's work communicated to outside stakeholders?

What is the format and scope of the organization's community engagement efforts?

Findings

Tulsa benefits from a rich set of external partners with which the City advances economic and community development.

Nonetheless, many external parties are unaware of the City's economic and community development priorities and key initiatives. Potential clients struggle to access the City's economic and community development offerings, reducing the type and number of Tulsans who benefit from municipal economic development resources. Finally, the current approach to community engagement has been inconsistent, creating confusion and, in some cases, failing to remedy longstanding community skepticism and mistrust in some of the organizations under review.

Recommendations

The City should reintroduce its role as a key partner in the economic development ecosystem, setting a strong plan for future communications, engagement, and community-driven guidance.

18. Leverage the release of the EDE's Strategic Plan and the launch of the consolidated entity as opportunities to reintroduce the City as a key actor in the economic development ecosystem.
19. Launch and regularly update a public-facing website for the consolidated EDE, designed with Tulsa businesses, and prospective investors and partners in mind.
20. Hire a community engagement specialist to centralize outreach and cultivate relationships with community leaders and potential partners.
21. Work with community and neighborhood group leaders to establish baseline expectations for community engagement, both for specific projects and for long-term input into the entity's priorities.
22. The consolidated economic development entity should consider ad hoc committees and task forces to enhance community engagement and inform board decision-making.

Partnerships & External Engagement | Findings

- 13. External parties are unaware of the City's economic and community development priorities and key initiatives.
- 14. Potential clients struggle to access the City's economic and community development offerings, reducing the type and number of Tulsans who benefit from municipal economic development resources.
- 15. The current approach to community engagement has created confusion and failed to remedy longstanding community skepticism and mistrust.

External parties are unaware of the City's economic and community development priorities, offerings, and initiatives.

"I work in this space, and I couldn't tell you what the City's community and economic development priorities are."

"When I'm looking to partner on a new pilot or a new grant opportunity, I don't call the City. I wouldn't even know who to reach out to."

"The City needs to be intentional about follow through. They include us in planning efforts but then nothing changes because no one has any spare bandwidth."

"You need a 'power broker' to help navigate important relationships if you want to get anything done in Tulsa."

"The system feels outdated, opaque, and inaccessible. I can't imagine what it feels like to those who aren't already entrenched in it."

"We need to either change the process and system to be more culturally competent and inclusive, and/or hire more people to translate the existing system."

Potential clients struggle to access the City's economic and community development offerings, reducing the type and number of actors who leverage City tools.

Insufficient information sharing with service delivery organizations and the public has created concerning barriers to access.

Opaque procedures

Unclear entry points

Though large business attraction/retention efforts benefit from priority assistance, **local small-business owners and entrepreneurs struggle to navigate** processes, paperwork, and City bureaucracy. These issues are particularly acute for small businesses outside the tech sector and those that require brick and mortar facilities.

Language barriers

The challenge of navigating City requirements and connecting with resources available is even more of a barrier for business owners with limited English proficiency. Few resources are translated and **there is no one to call who speaks their language.**

Offerings not broadly known

Few developers know that Authorities are potential sources for below-market land, conduit financing, or how to access these offerings. **Many tools are "hidden."**

Procurement conventions

Procurement conventions may **unintentionally exclude small businesses** through eligibility requirements that are well above statutory compliance regulations or dissemination tactics that do not reach diverse contractors. For example, MWBE home builders rarely carry the required insurance products to bid on a City project.

"Economic outcomes in Tulsa will only be as equitable as the funnel of opportunities."

"Minority communities will require intentional support efforts to build their capacity in both the nonprofit or private sectors.

The raw talent in Tulsa's minority communities exists, but absent

- **opportunities for mentorship** in leadership and professional skills;
- **access to networks of influencers and decision-makers** (public, private and nonprofit);
- **business incubation and targeted capital funding** for growth; and
- **a level playing field** upon which minority-led companies can compete against more experienced and advantaged firms (and partnerships),

the City's stated goals for "equity" will remain out of reach and overly optimistic in the near- and long-term."

Tulsa Roundtable Attendee
June 2020 survey response

The lack of a standardized approach to community engagement has created confusion, sometimes exacerbating historic mistrust.

The absence of a coordinated communications approach is a missed opportunity to improve program design and foster allies and advocates within the community.

Repeated public outreach and visioning activities leads to “plan fatigue.”

At times, poor word choice and insufficient transparency inflames community mistrust.

A lack of clarity on how investment and eminent domain decisions fuels conspiracy theories of “old boys’ networks” and the City’s “true motives.”

Even those partners and clients who are actively engaged in one of the City’s economic and community development offerings are often unaware about other resources available.

Partnerships & External Engagement | Recommendations

18. Leverage the release of the EDE's Strategic Plan and the launch of the consolidated entity as opportunities to reintroduce the City as a key actor in the economic development ecosystem.
19. Launch and regularly update a public-facing website for the consolidated EDE, designed with Tulsa businesses, and prospective investors and partners in mind.
20. Hire a community engagement specialist to centralize outreach and cultivate relationships with community leaders and potential partners.
21. Work with community and neighborhood group leaders to establish baseline expectations for community engagement, both for specific projects and for long-term input into the entity's priorities.
22. The consolidated economic development entity should consider ad hoc committees and task forces to enhance community engagement and inform board decision-making.

Leverage the Strategic Plan release and the launch of the consolidated entity as opportunities to reintroduce the City as a key actor in the economic development ecosystem.

Given the historic mistrust for some of Tulsa's economic development authorities, the release of the Strategic Plan and the consolidation launch offers an important opportunity to rebrand.

Public-facing materials and talking points should highlight:

- Organizational changes, updated mission and values, and new leadership.
- The role the new consolidated entity will play in achieving inclusive growth.
- Detailing the entity's refined **scope of work** and **new resources** that will become available for partners.
- **Key priorities and new initiatives** for the short and long-term.
- Upcoming **projects and bid opportunities**.

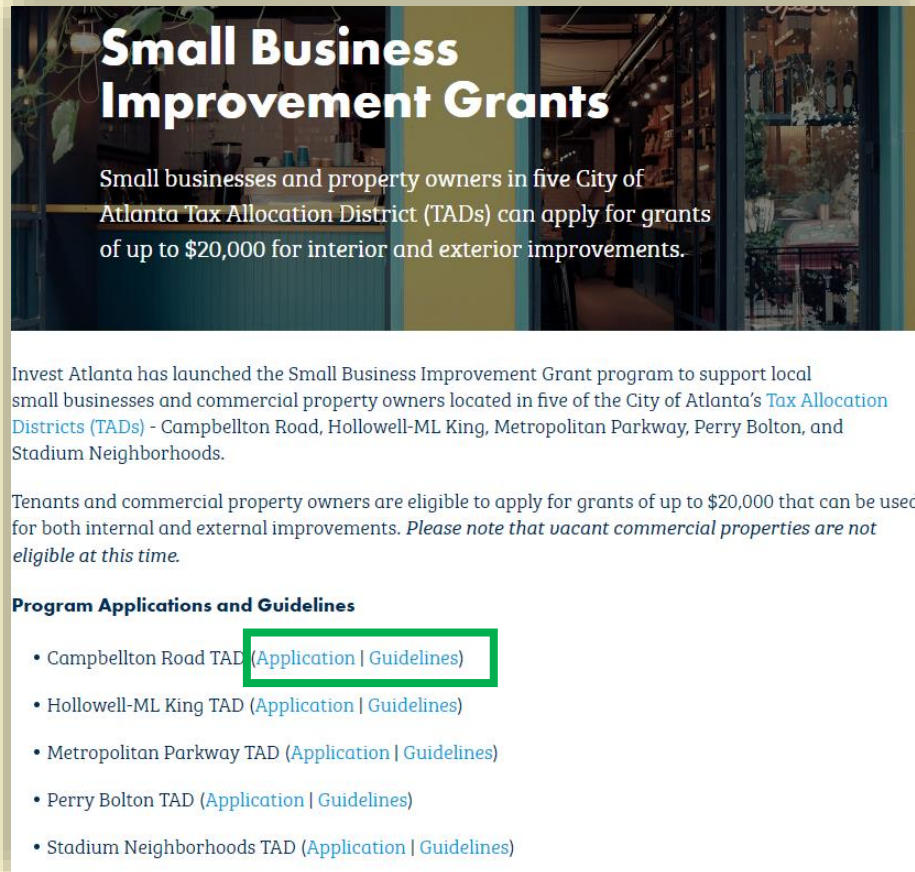
Launch and regularly update a public-facing website for the consolidated EDE, designed with Tulsa businesses, and prospective investors and partners in mind.

Important features include overviews of common procedures in multiple languages, downloadable forms and instructions, and a clearinghouse with active bidding opportunities and parcels available for disposition.

Purpose for a website:

- Support marketing efforts to **publicize the reorganization and rebrand** of the Tulsan economic development entity
- **Establish a digital presence** and means for electronic communication with partners
- **Promote efforts and assets** to a wider audience
- **Simplify processes for developers, businesses, site selectors, homebuyers, and local partners** by making process information and program applications widely available
- **Announce bidding opportunities**
- Convey entity **accomplishments and impacts**

Invest Atlanta has strategically enhanced its digital efforts to raise awareness of its work, promote its assets globally, and engage with its users directly.



Small Business Improvement Grants

Small businesses and property owners in five City of Atlanta Tax Allocation District (TADs) can apply for grants of up to \$20,000 for interior and exterior improvements.

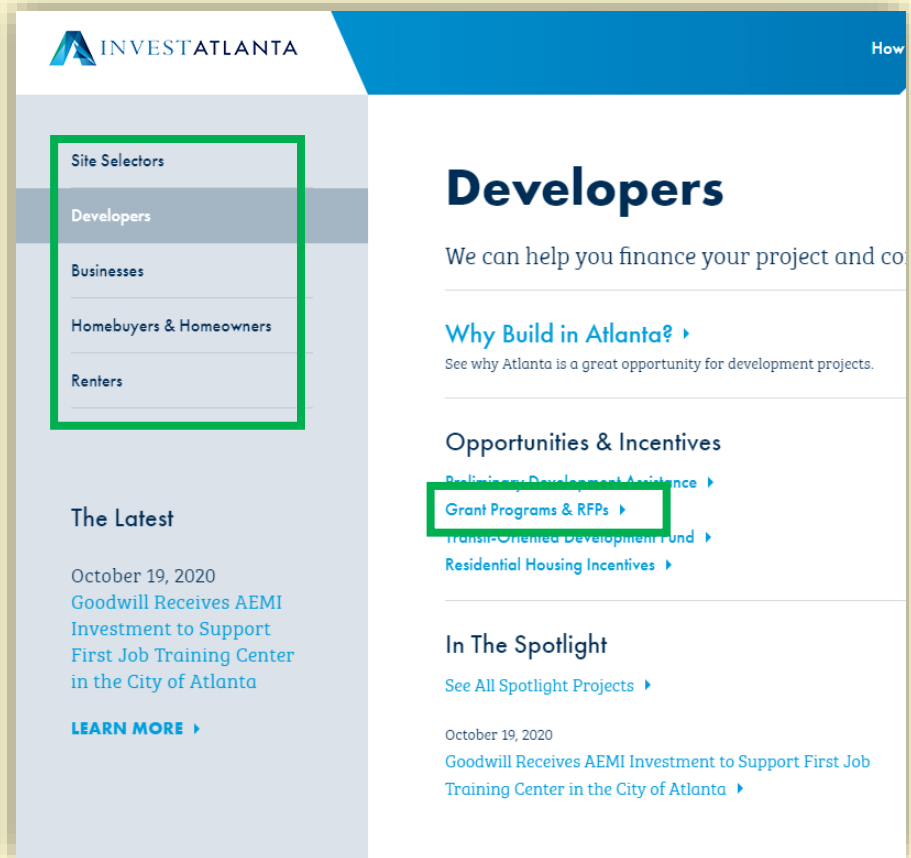
Invest Atlanta has launched the Small Business Improvement Grant program to support local small businesses and commercial property owners located in five of the City of Atlanta's [Tax Allocation Districts \(TADs\)](#) - Campbellton Road, Hollowell-ML King, Metropolitan Parkway, Perry Bolton, and Stadium Neighborhoods.

Tenants and commercial property owners are eligible to apply for grants of up to \$20,000 that can be used for both internal and external improvements. *Please note that vacant commercial properties are not eligible at this time.*

Program Applications and Guidelines

- Campbellton Road TAD ([Application | Guidelines](#))
- Hollowell-ML King TAD ([Application | Guidelines](#))
- Metropolitan Parkway TAD ([Application | Guidelines](#))
- Perry Bolton TAD ([Application | Guidelines](#))
- Stadium Neighborhoods TAD ([Application | Guidelines](#))

Program applications available online



INVESTATLANTA

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- [Transit-Oriented Development Fund ▶](#)
- [Residential Housing Incentives ▶](#)

The Latest

October 19, 2020
[Goodwill Receives AEMI Investment to Support First Job Training Center in the City of Atlanta](#)

[LEARN MORE ▶](#)

In The Spotlight

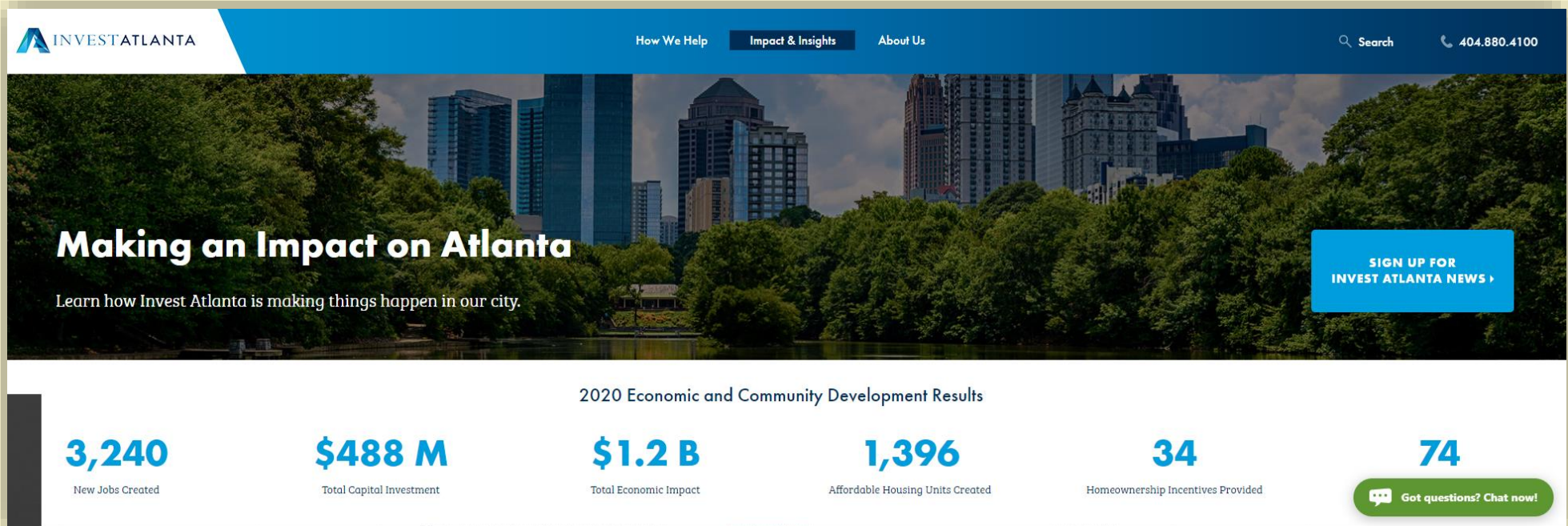
[See All Spotlight Projects ▶](#)

October 19, 2020
[Goodwill Receives AEMI Investment to Support First Job Training Center in the City of Atlanta ▶](#)

Tailored for various constituencies,
Bidding opportunities on the site

Precedent | Atlanta, GA

Invest Atlanta's website features a project and results dashboard that highlights its impact on economic development efforts across the City.



Entity impacts prominently displayed
Project dashboard to highlight key accomplishments

Hire a community engagement specialist to centralize outreach and cultivate relationships with community leaders and potential partners.

The EDE's success will depend on staff dedicated to prioritizing external communications and community outreach.

Precedent | Portland, OR

- Following its reorganization, Prosper Portland created a new department of Equity, Governance, & Communications to ensure that **community engagement and external communications are streamlined and aligned with the agency's social and racial equity efforts.**
- Prosper Portland hired staff to support community engagement, coordinating the agency's message and ensuring departments' outreach processes were aligned,



Building an Equitable Economy

Possible tasks for the EDE's community engagement lead include:

- Develop community engagement guidelines and standards
- Engage community representatives early in the project planning process
- Create a shared calendar to centralize engagement efforts and avoid redundancy
- Coordinate logistics for regular engagement events
- Develop marketing collateral to tell a cohesive story
- Keep track of community engagement efforts and outcomes

Work with community leaders to establish baseline expectations for community engagement, both for specific projects and for long-term input into the entity's priorities.

Building an established communication and engagement approach that embraces transparency as a value will improve programming through community buy-in.



Transparency: Entity staff and leadership should endeavor to publicize available resources to partners and to explain investments and use of tools like eminent domain to community members.

Thoughtful Communication: Engaging consistently with community members from different parts of the city can help ensure that all parties are speaking the same language.



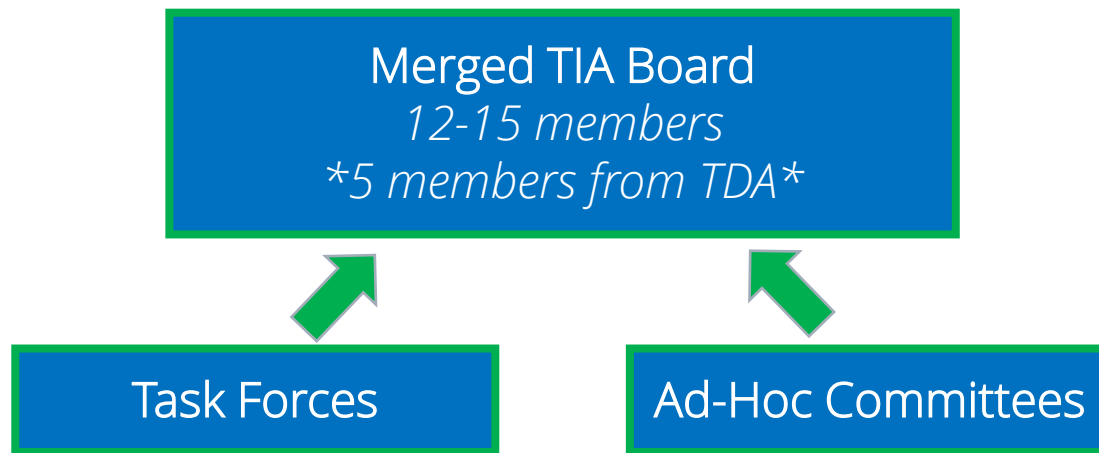
Accountability: When the entity solicits feedback from community stakeholders to prepare a neighborhood-level plan, the entity should keep in contact with community members and convey project progress. The entity should be held accountable to its plans.

Coordination: Coordinate closely with other departments' engagement efforts, such as the Communications Dept and the "Let's Talk Tulsa Parks" initiative, leveraging these outreach efforts if possible.



The EDE should consider creating ad hoc committees and task forces to enhance community engagement and inform board decision-making.

Committees and task forces can be effective bodies to inform decision-making on short and long-term priority issue areas.



Rationale for task forces and committees:

- Appointing non-board members to volunteer task forces and committees ensures greater expertise and diversity informing how the new entity makes decisions.
- Task forces and committees can serve as a point of connection between entity staff and board members and Tulsa's business and civic leaders, enhancing cross-sectoral, citywide communication.

Precedent | Portland, OR

*"Prosper Portland is committed to using every avenue possible to ensure full public participation on all of our projects and activities. In practice, that means that every significant project will have a **robust, fully inclusive citizen advisory committee drawn from neighborhoods, stakeholders, businesses and nonprofits.**"*

Prosper Portland's committees include:

- Council for Economic and Racial Equity
- Budget Advisory Committee
- Council of Economic Advisors
- Covid-19 Economic Relief and Recovery Response

IMPLEMENTATION ROADMAP



PLAN IMPLEMENTATION

Next 6
Months

LAY THE GROUNDWORK

Undertake consolidation of existing structures into the new EDE.

Advance conversations with civic leaders on how City economic development tools and powers can most effectively advance racial equity and upward mobility.

6 – 18
months

GET UP & RUNNING

Launch a community-driven Strategic Planning process for the new EDE to inform:

- Mission and vision
- Roles and responsibilities
- Core programmatic initiatives and implementation
- Staff and leadership recruitment

18+
Months

REVIEW, REFINE & ENHANCE

Review potential for ongoing organizational improvements.

Design and implement mission-centered programming to carry out core organizational initiatives.

Focus on long-term repositioning of strategic assets to advance mission.

Remainder of FY2021: Lay the Groundwork

Next 6
Months

6 – 18
months

18+
Months

MISSION & OBJECTIVES

- Formalize the guiding vision for the City's economic development role in a mission statement.

STRUCTURE & GOVERNANCE

- Secure approval from the various boards to consolidate EDC, TIA, TPA, and TDA into a single entity.
- Revise TIA indenture documents to reflect the new mission, board composition, roles, responsibilities, and powers of the consolidated entity. Consider a name change.
- Launch recruitment efforts to attract individuals with the desired diversity of perspectives and skillsets to serve on the new board.
- Develop the framework for the management agreement that will govern future City-entity relations.

FUNDS & ASSETS

- Generate a consolidated financial report of all public dollars deployed for economic development purposes, including assets, debt, and operations.
- Using this report and the mission statement, determine the allocation of resources and assets among the new entity, TPFA, and City government.
- Retire TPA's debt
- Develop a mission-aligned FY22 budget for the consolidated entity.
- Develop the FY22 management agreement.

PARTNERSHIPS & ENGAGEMENT

- Use the public rollout of the Strategic Plan as an opportunity to reintroduce the City as an economic development actor.

OPERATIONAL EFFICIENCIES

- Develop a FY22 staff plan and job descriptions.
- Work with the City Finance, Human Resources, IT, and Customer Care departments to determine the most efficient and cost-effective way to execute procedural tasks.
- Meticulously document all complex, multi-step procedural workstreams that are likely to remain the responsibility of the new entity.
- Confer with the Legal and Human Resources departments on the logistical requirements of the new entity employing its staff directly, including the transfer of current City employees to the new entity.

FY2021-FY2022: Getting Up and Running

Next 6
Months

6 – 18
months

18+
Months

MISSION & OBJECTIVES

- Curate a set of targeted, mission-aligned performance goals.

STRUCTURE & GOVERNANCE

- Nominate and approve appointees to the TIA, TDA, and TPFA boards.
- Develop orientation materials for new board members and staff.
- Dissolve TPA and EDC

FUNDS & ASSETS

- Launch a strategic review of the consolidated entity's real estate asset portfolio, culminating in mission-centered disposition goals and timeline.

OPERATIONAL EFFICIENCIES

- Recruit highly skilled hires, including but not only from current City and Authority staff.
- Redesign the procedures, templates, and protocols used for board activities, to minimize workload and encourage bold, nimble decision-making.
- Develop evaluation checklists to help the board and staff integrate mission-alignment into decision-making. The checklists should be relevant to both resource allocation decisions and specific program determinations.
- Determine how and with what regularity data related to performance metrics will be collected, reviewed internally, and released to the public.

PARTNERSHIPS & ENGAGEMENT

- Consult potential external partners and affected communities on how, concretely, the new EDE can be both effective and respectful in its pursuit of its mission.
- Determine the vision and content needs for a new website, then issue an RFP.
- Organize, update, digitize, and/or create the content to be included on the website, including forms, submission guidelines, and schedules, and evaluation criteria for business incentives.
- Put internal systems in place to ensure regular, thoughtful, and creative coordination with the Planning Office, WIN, Development Services, Communications, and the Finance Dept.

FY2023 and Beyond: Review, Refine, and Enhance

Next 6
Months

6 – 18
months

18+
Months

STRUCTURE & GOVERNANCE

- Instigate an ongoing recruitment plan to cultivate a diverse pipeline of future board members.
- Refine the framework for the management agreement that will govern future City-entity relations.
- Transition the TPFA functions and responsibilities that relate to economic development into the new EDE.

FUNDS & ASSETS

- Review the allocation of resources and assets among the new entity, TPFA, and City government.
- Implement mission-centered real estate disposition plan.

OPERATIONAL EFFICIENCIES

- Review whether the allocation of procedural tasks among EDE staff, City staff, and outside contractors remains the most efficient and cost-effective.
- Develop a long-term staff plan, job descriptions, and recruit highly skilled hires accordingly.
- Refine procedures, templates, and protocols used for board activities, to minimize workload and encourage bold, nimble decision-making.
- Review all complex, multi-step procedures for inefficiencies or reoccurring roadblocks.
- Refine evaluation checklists and matrices to help the board and staff integrate mission-alignment into decision-making.

PARTNERSHIPS & ENGAGEMENT

- Prioritize transparency by continuously updating the website.
- Review and enhance the internal systems in place to ensure regular, thoughtful, and creative coordination with City Departments, with a particular emphasis on community engagement activities.
- Return to potential external partners and affected communities for advice on how, concretely, the EDE could enhance its effectiveness and its relationships with external groups.
- Determine whether the EDE board would benefit from committees or ad hoc task forces. If so, recruit appropriate community members to serve in that capacity.

APPENDICES

Methodology

Entities Under Review

Current Condition Profiles

PROJECT METHODOLOGY

PHASE 1 : VISION & STAKEHOLDER ENGAGEMENT

The team **reviewed existing research and plans** to develop a baseline understanding of the City's economic and community development operations, and ensure our familiarity with Tulsa's economic trajectory, existing and past efforts to address economic mobility, and any relevant initiatives.

HR&A **conducted in-depth interviews with staff and leadership** of existing economic and community development entities. We **held a series of virtual roundtable discussions and distributed a survey for stakeholders in Tulsa's economic and community development ecosystem**, to understand priorities and perceived challenges and explore how Tulsa's economic and community development ecosystem can best respond to community needs and achieve its goals of growth and prosperity for all.

PHASE 2 : ASSESSMENT & DIAGNOSIS

The team **conducted an in-depth assessment** of the seven priority economic and community development entities, developing a thorough understanding of the structures, operations, mission overlap/alignment, and financial resources and constraints of each of the organizations.

PHASE 3: RECOMMENDATIONS

The team **sourced best practices** for how other cities have handled similar challenges. We leveraged those insights, as well as our expertise and collaboration with the City team, and the Working and Steering Committees, to begin building recommendations that informed **structural alignment, organizational roles and responsibilities, and operational practices**. We refined those recommendations through continued engagement with the **advisory committees and reengaged with local stakeholders** to share updates and receive feedback.

PHASE 4 : IMPLEMENTATION

HR&A **produced this final strategy, with implementation considerations**, to align the authorities, boards, commissions, and City departments to advance core economic and community development goals, broaden access to opportunity, foster inclusive growth, and allow all residents to contribute to the vibrancy of Tulsa.

200+

REPORTS, DOCUMENTS, AND PUBLICATIONS REVIEWED

30+

STAFF INTERVIEWED FROM NINE AGENCIES, DEPARTMENTS, AND COMMISSIONS

7

STAKEHOLDER ROUNDTABLE DISCUSSIONS

PROJECT METHODOLOGY | COMMITTEES

We owe a debt of gratitude to the dozens of Tulsans – some of whom are listed below – who contributed their time, perspectives, and expertise to the development of this strategy.

Steering Committee

- Mayor G.T. Bynum
- Councilor Vanessa Hall-Harper (District 1)
- Councilor Ben Kimbro (Council Chair)
- Craig Abrahamson - Chair, TPA Board
- Alison Anthony – Pres. and CEO, Tulsa Area United Way
- Carlisha Williams Bradley - ED, Impact Tulsa
- Jessica Lozano-Alvarez –Tulsa Hispanic Chamber of Commerce
- Marcia Macleod - Chair, TPFA Board
- Bill Major – ED, Anne & Henry Zarrow Family Foundation
- Sid McAnnally – SVP Operations, ONEGas/Chamber Rep
- Rick Muncrief - Chairman and CEO, WPX Energy
- Katie Plohocky - Chair, TIA Board
- Nancy Roberts - Chair, TDA Board
- Kathy Taylor - Lobeck Taylor Family Foundation
- Mark Tedford - Chair, EDC Board
- Rose Washington - ED, TEDC / Chamber Rep

Working Committee

- Craig Abrahamson – TPA, Board Chair
- Michelle Barnett – Deputy Chief of Economic Development
- Jim Coles – Director of Economic Development
- Nick Doctor – Director of Community Development and Policy
- Becky Gligo – Housing Policy Director
- Jeff Hall – Tulsa Housing Authority, VP Strategic Planning & Intergovernmental Affairs
- Peyton Haralson – TPA, Executive Director
- Travis Hulse – INCOG, Principal Planner
- Kian Kamas – Chief of Economic Development
- Marcia Macleod - Chair, TPFA Board
- Justin McLaughlin – Tulsa Regional Chamber, SVP of Economic Development
- Dwain Midget – Working in Neighborhoods, Director
- Susan Miller – INCOG, Planning Director
- Spencer Mitchell – Economic Development Specialist
- Ashley Philippsen – Deputy Chief of Community Development and Policy
- Katie Plohocky – TIA, Board Chair
- Krystal Reyes – Chief Resilience Officer
- Nancy Roberts – TDA, Board Chair
- Mark Tedford – EDC, Board Chair
- Bill Walker – Senior Assistant City Attorney, Contracts

PROJECT METHODOLOGY | ROUNDTABLES

Roundtables

Philanthropy

Alison Anthony
Randee Charney
Nancy Curry
Michael DuPont
Elizabeth Frame Ellison
Phil Lakin
Ken Levit
Bill Major
Josh Miller
Heather Palacios
Stacy Schusterman
Jeff Stava
Kathy Taylor

Real Estate Development

Bruce Bolzle
Chris Bumgarner
Thomas Carlson
David Charney
Mike Cotrill
Patrick Fox
Steve Ganzkow
Nathan Garrett
Gordy Guest
Ross Heyman
Dave Kollman
Terry McGee
Burlinda Radney
Warren Ross
Jeff Smith
Casey Stowe
Steven Watts
Will Wilkins
Debra Wimpee

Workforce Development

Carlisha Williams Bradley
Lauren Brookey
Pamela Fry
Leigh Goodson
Rachel Hutchings
Brian Paschal
Andrea Pemberton
Karen Pennington
Vanessa Portillo
Rue Ramsey
Kuma Roberts
Jeffrey Smith
Art Tyndall
Sabrina Ware
Scott Williams

Economic Development Ecosystem

Sherry Gamble-Smith
Elian Hurtado
Jessica Lozano
Jeff Moore
Bill Murphy
Brandon Oldham
Andrew Ralston
Janet Smith
Jennifer Springer
Kinnee Tilley
Kor Xiong

Neighborhood Development

Jennifer Barcus-Schafer
Tracie Chandler
Reggie Ivey
Luisa Krug
Maria Elena Kuykendall
Tim Newton
Justin Pickard
Greg Robinson
Ed Sharrer
Jessica Shelton
Marcia Bruno Todd
Kirk Wester

Business Environment

Jaime Barraza
Steve Bradshaw
Chet Cadieux
Zac Carman
Glen Cole
Carlin Conner
Michael Dunn
Chuck Garrett
Jake Henry
Francisco Ibarra
Sid McAnnally
Erik Olund
Kayse Shrum
Daniel Sigala
Casey Sparks

Small Business & Entrepreneurship

Francisco Anaya Jr.
Wanda Armstrong
Libby Billings
Angela Byers
Venita Cooper
Brandon Jackson
Devon Laney
Jessica Molina
Elizabeth Nave
Elliot Nelson
LaToya Rose
Colleen Almeida Smith
Janet Smith
Rose Washington
Bridget Weston

Other Interviews

Economic Development Commission

Shelley Cadamy
Monte Caplan
Elliot Nelson
Cassie Reese-Tipton
Warren Ross
Mark Tedford

Legal Interviews

Leslie Batchelor
Jot Hartley
Eric Nelson
Jeff Sabin
John Weidman

Tulsa Development Authority

Thomas Boxley
Carl Bracy
Steve Mitchell
Demaury Myers
Nancy Roberts
Carol Young

Tulsa Industrial Authority

Joan Parkhurst

Tulsa Parking Authority

Jennifer Griffin
Brian Kurtz

Economic Development Commission (EDC)

Revived
2017

Type
City Task Force

Mission Statement
Assembling, distributing and advertising information, ideas, and research results and conducting research and advance proposals to promote the orderly development and use of the natural and human resources located in and around the city of Tulsa. Developing, maintaining, implementing and reviewing long-range plans to promote the development of the City as a convention and tourist center and to encourage the use of facilities in the City of Tulsa.

Board Structure
11 Mayoral Appointees, approved by the City Council; 3-year terms

Authorizing Language

"The duties of the Economic Development Commission shall be...to support and assist the efforts of the City of Tulsa, state of Oklahoma, local development corporations, industrial committees, chambers of commerce, and other similar public and private agencies; and to obtain and foster the expansion of agricultural, commercial, industrial, and recreational facilities or enterprises,"
(Chapter 4, Section 402, Creation of the Economic Development Commission, Nov. 17, 1959)

EDC Overview

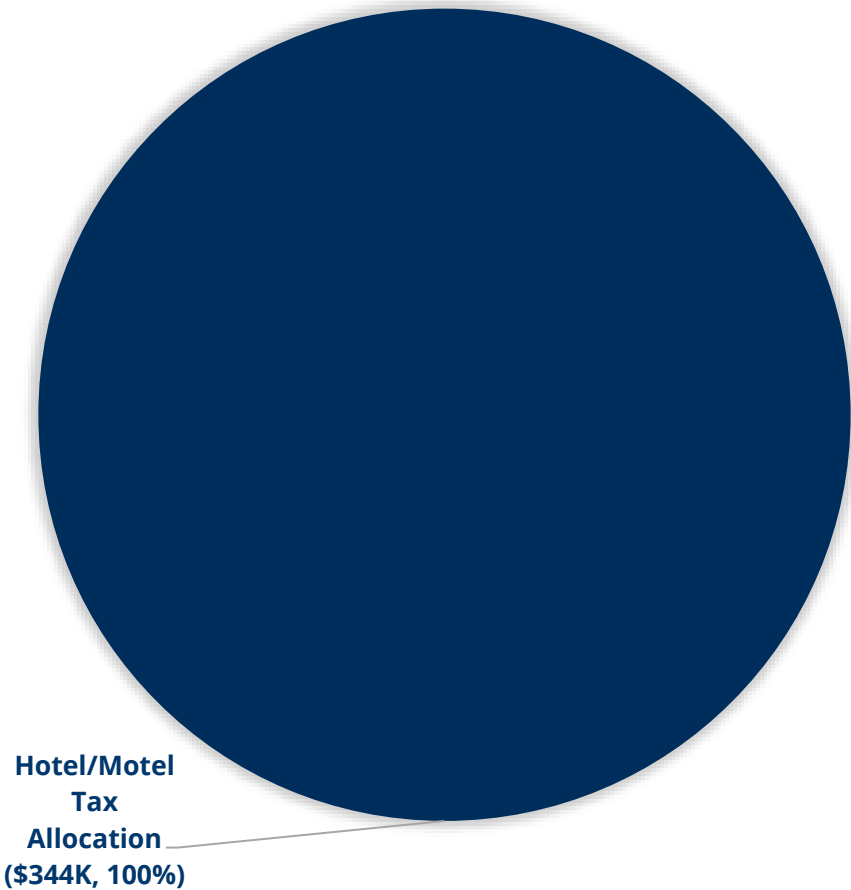
Though previously active in the City of Tulsa, the Economic Development Commission was discontinued under Mayor Dewey Bartlett. Mayor Bynum revived the EDC in 2017.

Current Activities and Powers

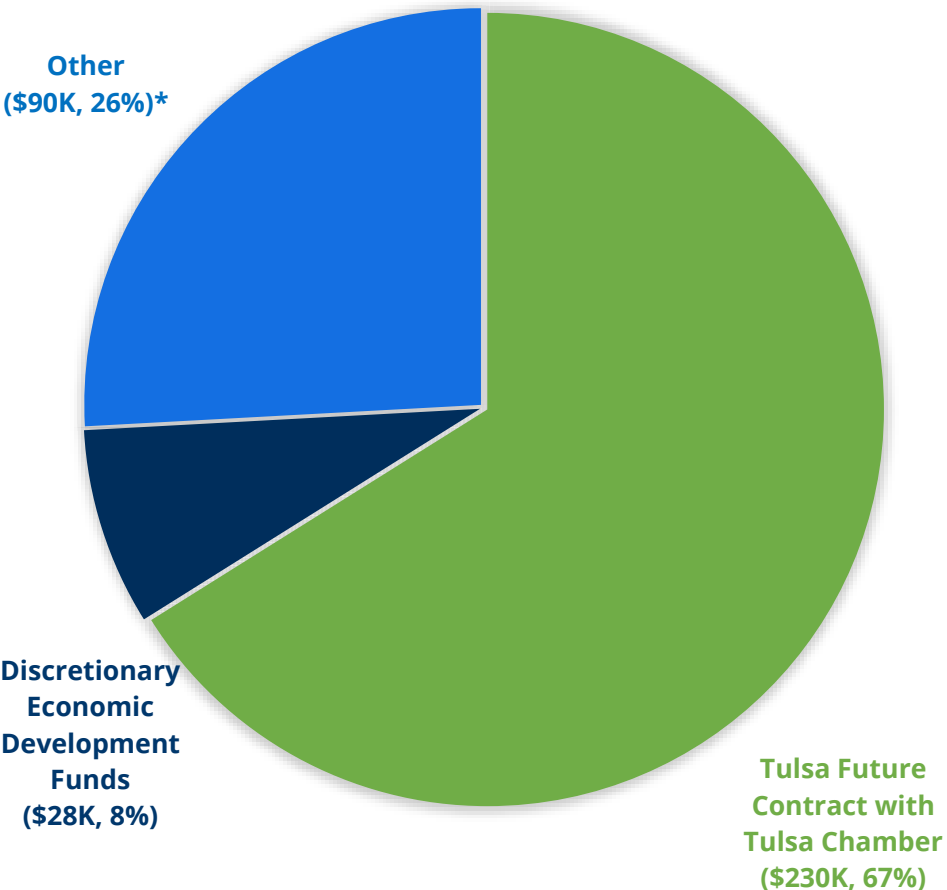
- EDC's activities currently include:
- Monthly meetings
 - Listen to various presentations regarding economic development in the City and offer feedback
 - Guide larger economic studies like the recent Retail Study and the ongoing Housing Study
 - Act as liaison for recruiting and attracting new business
 - Four active committees: Budget, Real Estate, Policy, and Nominating; Small Business & Entrepreneurship is pending.
- EDC possesses the following powers:
- Advise on how to allocate their annually assigned 4.5% of the City's Hotel/Motel tax revenue.

EDC Revenue and Expenses: FY2019-20

EDC REVENUES: \$344K



EDC EXPENSES: \$344K



*Part of "Other" is Mike Dickerson's salary. Mike Dickerson is an Economist with the City of Tulsa.

Source: City of Tulsa Budget, FY2019-20

Important Organizational Shifts



Inclusive Growth Focus

Since the city has refocused efforts on equitable and inclusive growth, the EDC has been advising on how best to implement inclusive growth strategies. Their work supporting the various studies includes that focus.

Icon Key



Mission & Objectives



Structure & Governance



Funds & Assets



Operational Efficiencies



Partnerships & External Engagement

What's Working



Steadily Growing Role

There is some consensus that EDC is slowly expanding its role as an advisory body as it supports the development of the retail, housing, and commercial revitalization studies. The EDC has also adopted the City's inclusive growth focus as a lens for how it operates.

Areas for Improvement



Defining Its Role and Authority

While EDC is gaining some responsibility, there's still a lack of consensus about what role or authority it should have.



Coordination with Other Entities

Though EDC is a primary economic development advisory body, the Commissioners were not familiar with leadership at the authorities, nor were they familiar with what roles the other authorities play.



Finding the Right Commissioners

Several stakeholders mentioned that it can be difficult to find Commissioners that fit with what the EDC needs in terms of expertise and experience.

Tulsa Development Authority (TDA)

Founded
1959

Type
Title 11 Urban Renewal

Mission Statement
Improve and grow Tulsa using private and public resources to fund programs and projects that help neighborhoods and commercial centers to thrive and sustain growth and prosperity.

Board Structure
5 Mayoral appointees, approved by the City Council. No City employees or elected officials can sit on the board. Appointees must have lived in Tulsa for 5 years prior to appointment. Chair or Vice Chair designated annually before August 1.

Authorizing Language

“That the exercise of the authority or powers prescribed by House Bill #602 of the twenty-seventh Legislature of the State of Oklahoma by the Tulsa Urban Renewal Authority is in the public interest and for the public uses and purposes and is necessary for the rehabilitation, conservation, redevelopment or a combination thereof, of blighted areas which exist within the corporate limits of the City of Tulsa, Oklahoma...” (Resolution 2339, City of Tulsa, Nov. 17, 1959)

TDA Overview

Initially formed as the Tulsa Urban Renewal Authority in 1959, it translated federal funding into blight remediation efforts until the funding program ended in 1974.

Current Activities and Powers

- Now, TDA’s activities include:
- Removing blighted buildings to restore land value and promote redevelopment
 - Selling surplus land for redevelopment and revitalization
 - Assist City of Tulsa in selling unused parcels
 - Managing legacy TIF districts
 - Administering downtown development funds to drive multi-family residential projects
 - Sector and Strategic Plans for areas targeted for improvement.

- TDA possesses the following powers:
- Eminent Domain
 - TIF administration
 - Property purchase and sales
 - Sector Plan Admin
 - Bond Issuance
 - Redevelopment Agreements

Staff’s Role

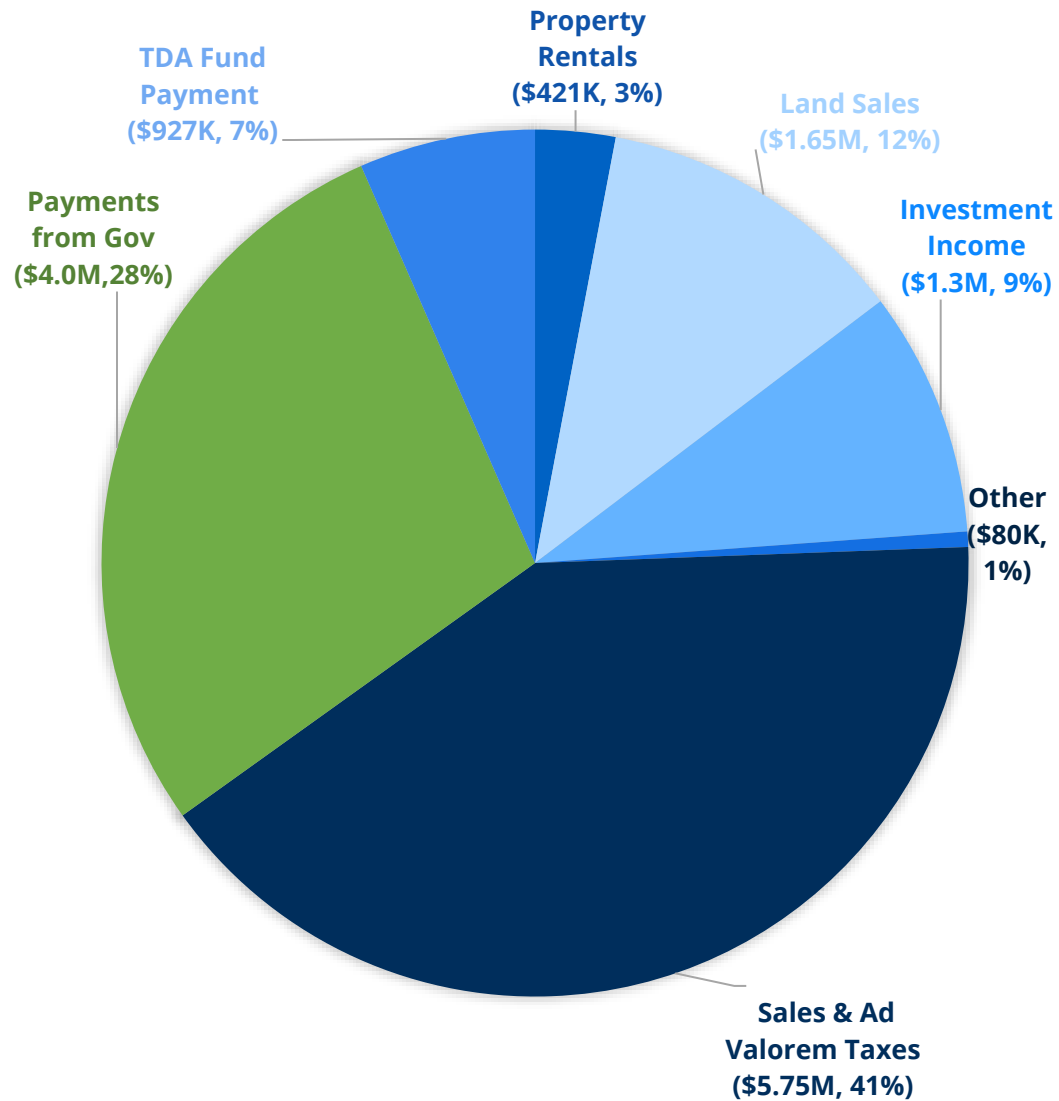
- Developer relations (residential and commercial)
- Manage property sales
- TIF administration
- Property maintenance
- Website maintenance
- Manage finances/payroll
- General office administration

Board’s Role

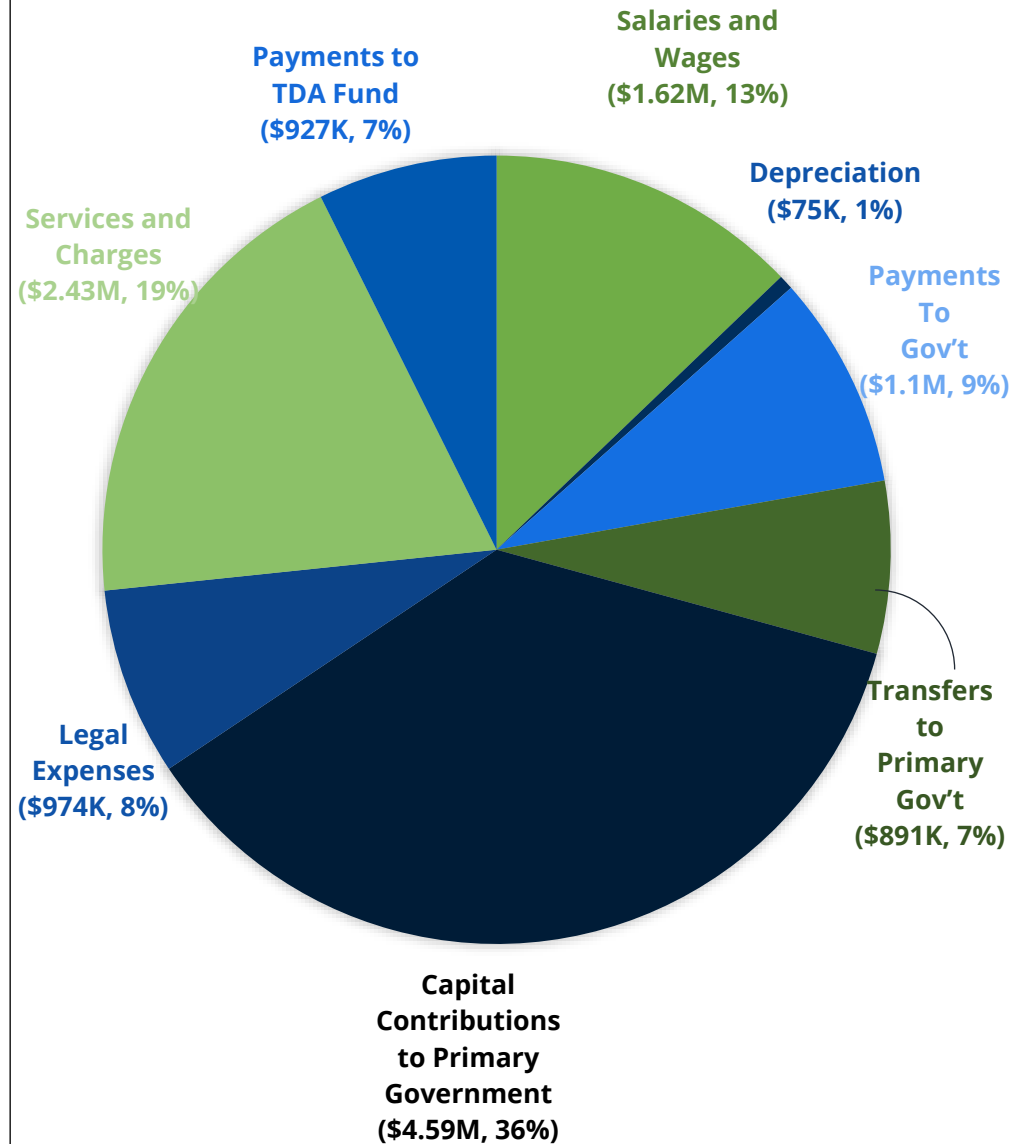
- Coordinate with Mayor’s Office of Economic Development
- Discuss pending litigation
- Guide and approve TIF activities; take for approval to City Council
- Review and approve property sales and major maintenance projects
- Consider proposed changes to TDA properties
- Handle contract disputes
- Oversee TDA’s operations and role of the Executive Director
- Review and approve financials and annual budget
- Review and approve annual audits

TDA Revenue and Expenses: 2014-19

TDA REVENUES: \$14.1M



TDA EXPENSES: \$12.6M



Source: TDA Financial Reports 2014-2019

Important Organizational Shifts



CDBG Funds and TDA's Independence

Previously, TDA played a larger role in CDBG funding use. However, because of legal restrictions, the City's Grants Administration division is now the primary trustee of federal entitlement funds. Questions over CDBG responsibility prompted a larger conversation over TDA's independence from the City as a Title 11 urban renewal authority that continues today.



OC Walker's Resignation

As of December 2019, the former Executive Director of TDA resigned. In his stead, Nancy Roberts, the current Board Chair, is acting as interim ED.

What's Working



Strong Current Board Leadership

TDA is anchored by steady, diverse leadership between the Board and Interim Director. TDA is currently streamlining operations and training staff. In addition, stakeholders affirm that TDA's board is one of the most engaged and effective boards in the City right now.



Downtown Redevelopment

Overall, TDA contributed substantially to Downtown Tulsa's successful redevelopment. Between this investment and enhanced amenities, people want to live in and visit downtown.

Areas for Improvement



Community Engagement

TDA Board Members admitted that TDA will need to work on repairing its relationship with North Tulsa residents and community groups



Coordination with Other Entities

Many interviewees suggested that the entities were siloed and were not working in tandem to achieve larger economic development goals.



Staff Support

Several stakeholders we interviewed commented that TDA could benefit from additional staffing and that staff needed additional training to manage the entity's programs.

Tulsa Industrial Authority (TIA)

Founded
1991

Type
Title 60 Public Trust

Mission Statement
To stimulate economic growth and development of Tulsa by acting as a vehicle for tax exempt financing and issuing grants for the Brownfield program.

Board Structure
7 Mayoral Appointees and the Mayor/Mayoral Designee, approved by the City Council. Must be citizen and resident of Tulsa. 5-year terms.

Authorizing Language

"The purposes of this trust are to promote the development of industry within and without the territorial limits of the [City of Tulsa] and to provide additional employment which will benefit and strengthen the economy of the [City of Tulsa] and the State of Oklahoma..." (Title 39, Chapter 10, Article 3.1, City of Tulsa, July 5, 1991)

TIA Overview

Historically, TIA's focus has evolved through three different phases of work:

- 1) Issuing industrial development bonds
- 2) Brownfield remediation
- 3) Tax-increment financing

Activities and Powers

TIA's current activities include:

- TIF administration
- Managing Airport Hangar 80
- Geothermal project
- Supporting development
- Issuing conduit debt

TIA possesses the following powers:

- Issue Industrial Development Revenue Bonds
 - Must be approved by City Council
 - Debt collateralized by revenues of borrowing organizations
 - TIA loans proceeds from notes and bonds to organizations or enters into lease-purchase agreements for the facilities.
- TIF administration
- Brownfield remediation grants

Staff's Role

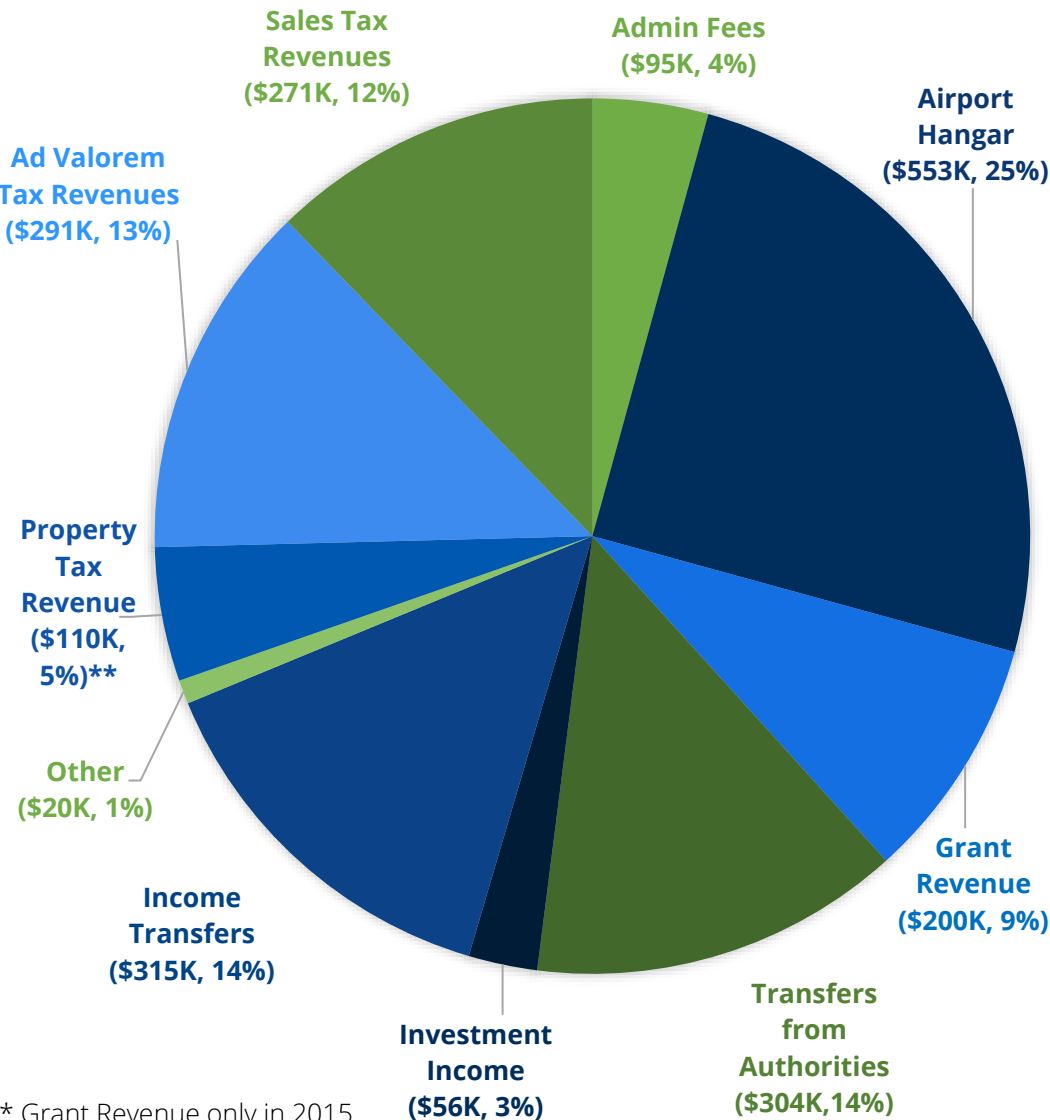
- Developer Relations
- Minimal
 - Executive Director employed from the City at 20%, only employee, with some support from city staff
 - In FY21, additional support funded to increase staff reporting from MOED to TIA.

Board's Role

- Approve TIF agreements, work with City Council to approve
- Review and scrutinize developer proposals
- Receive guidance from Mayor's Office of Economic Development
- Approve bond issuance
- Manage Airport lease
- Review and approve developer financing agreements
- Oversee TIA's operations and role of the Executive Director
- Review financials

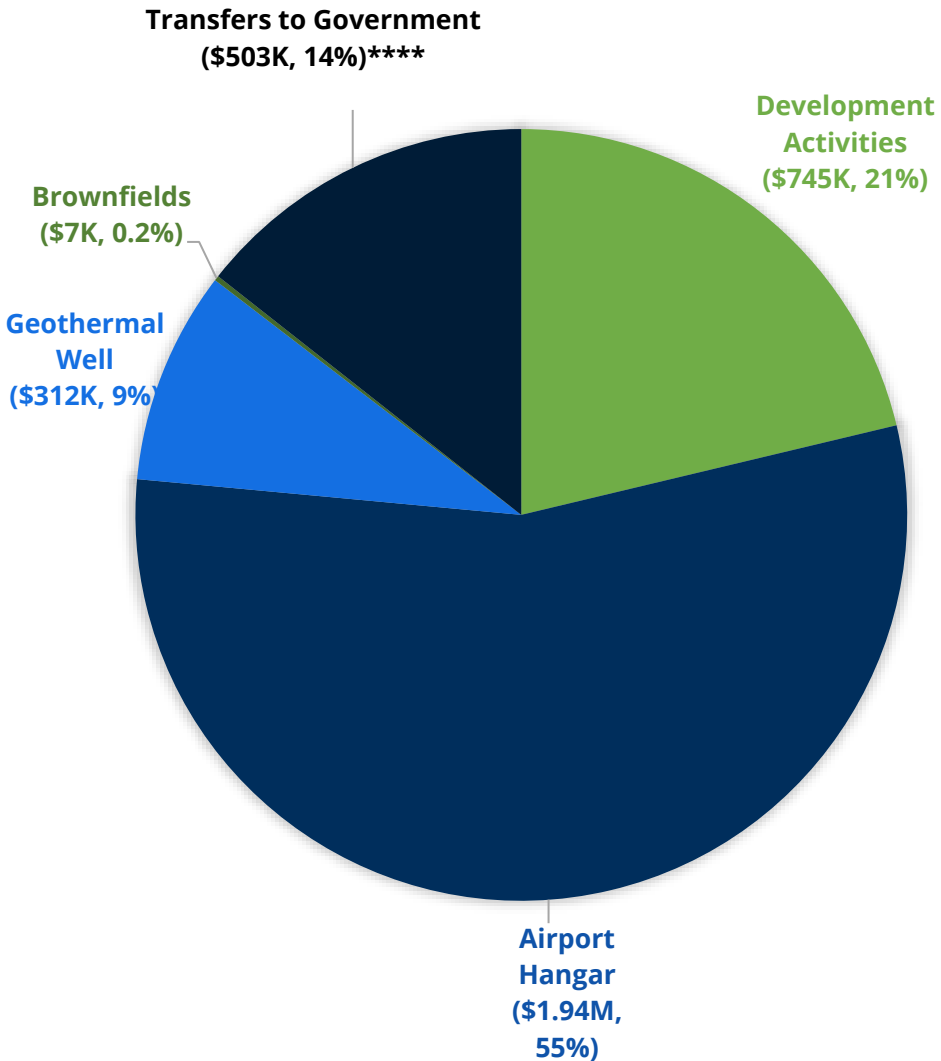
TIA Revenue and Expenses: 2014-19

TIA REVENUES: \$2.2M



* Grant Revenue only in 2015
** Property Tax Revenue only in 2018
*** Sales and Ad Valorem Tax Revenue only in 2019
**** Transfer to City only in 2015

TIA EXPENSES: \$3.5M



Source: TIA Financial Reports 2014-2019

Important Organizational Shifts



TIA Manages TIF

Historically, TDA had primarily managed the City's TIFs. Currently however, the City has been shifting TIF responsibilities to TIA. TIA currently manages several Downtown TIFs, two of which are conservatively predicted to generate \$450M.



Evolving Responsibilities

Taking on TIF could be the beginning of the expansion of TIA's responsibilities. Given the substantial amounts of TIF money set to come through TIA, they will need additional staffing and oversight protocols to ensure that the money ends up where it needs to. As the authority grows in revenue, there is potential for TIA to drive projects outside of downtown in alignment with the City's equity goals. One stakeholder we interviewed suggested that TIA could also become an administrator of different financing tools like revolving loan funds or New Market Tax Credits.

What's Working



A Trustworthy Entity

The City trusts the TIA to manage the more substantial TIF programming. Many of the stakeholders we interviewed suggested that TIA could take on a larger role in the development scene.



Strong Leadership

TIA is bolstered by its seasoned Executive Director and board members with decades of economic development experience and deep involvement in Tulsa.

Areas for Improvement



Staffing

Many stakeholders commented that TIA can play a larger role in the ecosystem, but they don't currently have the staff to operate in that larger role.



Community Engagement

Currently, TIA's activities do not include a broader effort at community engagement. If TIA's role changes, community engagement may become more relevant to their operations.



Role & Responsibility

TIA's role and responsibility in the Tulsa ecosystem has shifted historically. As TIA plays a greater part in that ecosystem, it will be important to communicate their role and responsibilities to external parties.

Tulsa Parking Authority (TPA)

Founded
1960

Type
Title 60 Public Trust

Mission Statement
To promote acquisition, construction and operation of parking facilities within the City of Tulsa. TPA has the financial capacity to issue revenue bonds to provide funds for the acquisition and construction of publicly operated parking facilities. TPA establishes budgets and rates annually and submits them to the City Clerk and Bond Trustee.

Board Structure
4 Mayoral Appointees and the Mayor/Mayoral Designee, approved by the City Council; 6-year terms.

Authorizing Language

“The purposes of this trust are to acquire or construct...to own, maintain, or operate...automotive parking stations...To issue bonds, notes, or other obligations, in such manner and such price as the Trustees may deem desirable...To hold maintain and administer any leasehold rights...to provide funds for the cost of financing, acquiring, constructing, purchasing, equipping, maintaining, leasing, repairing, improving, extending, enlarging, remodeling, holding, operating and administering any and all foresaid services...for executing and fulfilling the trust purposes.” (Title 39, Chapter 5, Article 3, City of Tulsa, Feb. 12, 1963)

TPA Overview

Historically, TPA has focused on providing parking services within parking facilities in Downtown Tulsa. TPA does not manage street parking.

Activities and Powers

- TPA's current activities include:
- Managing and maintaining lots and garages, green space, and pedestrian bridges
 - Building and improving old lots
 - Contributing to key economic development projects
 - Further developing owned property into mixed-use projects
 - Market analysis where there is potential for parking demand

- TPA possesses the following powers:
- Issues revenue bonds
 - Requires TPA to charge at-market or near-market rate for parking so that they use revenue to pay bonds
 - Bond Rating: AA-

Staff's Role

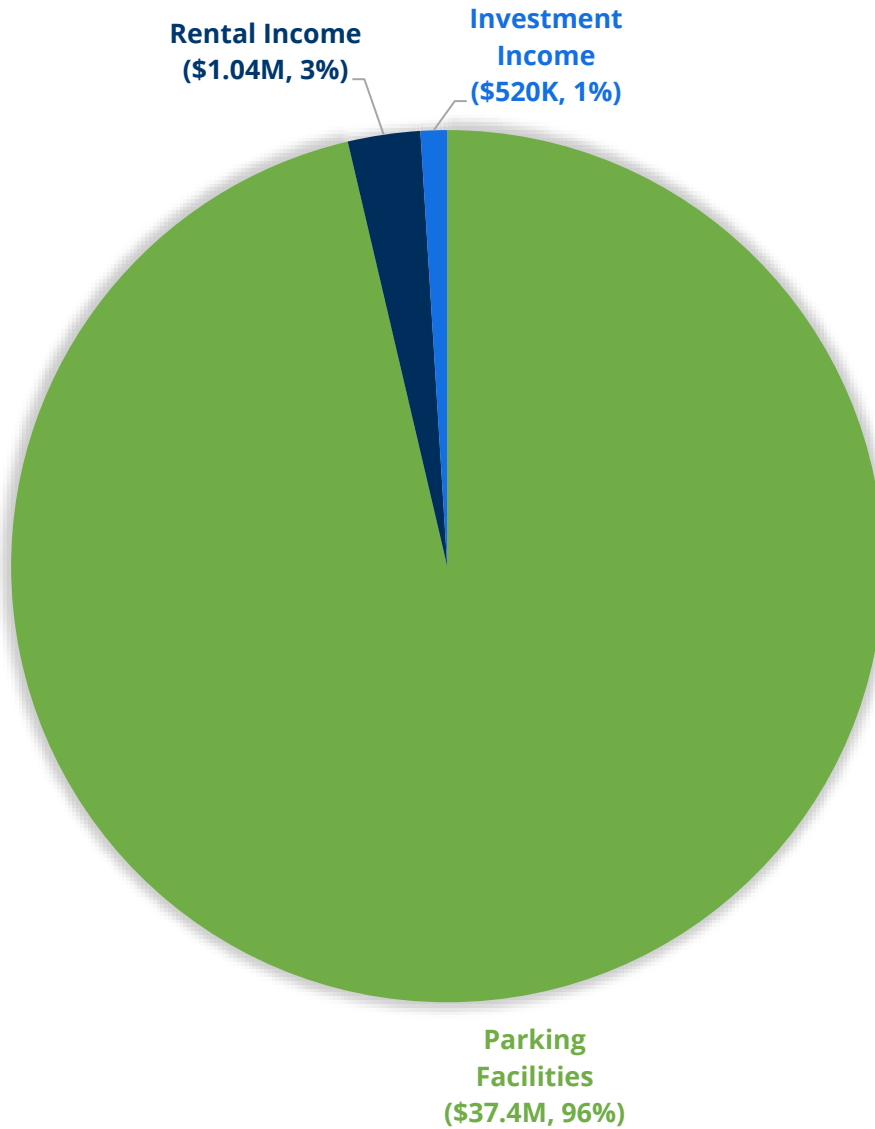
- 1 FTE: Executive Director
- Manages finances, monitors revenues
- Organizes repairs and maintenance to current facilities
- Leads/manages RFP process
- General administration

Board's Role

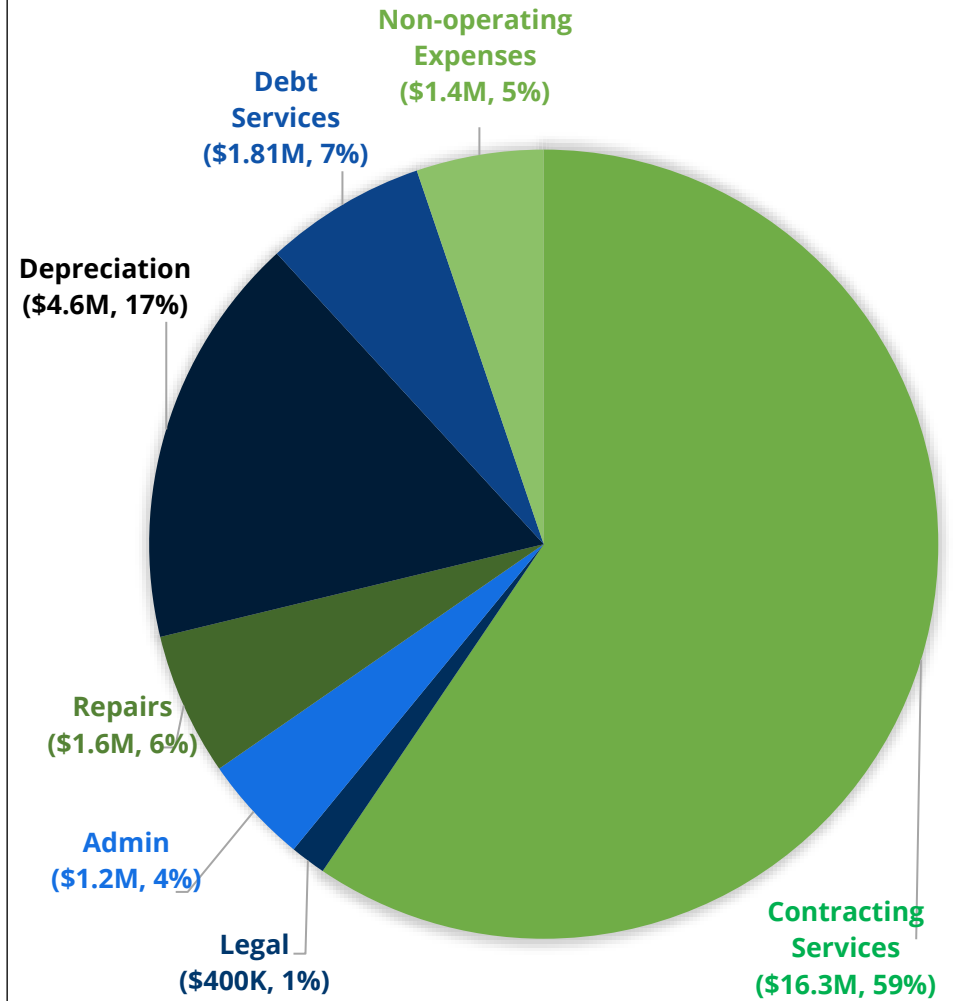
- Review properties managed by 3rd parties
- Approve major repairs and maintenance to existing facilities
- Approve new projects/RFPs
- Receive assistance from Mayor's Office of Economic Development
- Approve bond issuance
- Review pending legal matters with contracted counsel
- Review and approve developer financing agreements
- Oversee TPA's operations and role of the Executive Director
- Review and approve financials and budget

TPA Revenue and Expenses: 2014-19

TPA REVENUES: \$39M*



TPA EXPENSES: \$27.4M*



Source: TPA Financial Reports 2014-2019

Important Organizational Shifts



TPA Issues RFP for Mixed-Use Development

TPA recently issued an RFP to market a mixed-use development on N. Boulder Ave. They chose to sell the land to a developer with a holistic vision for the site including retail and a new hotel. TPA will manage the parking structure.



Evolving Responsibilities

TPA is considering how to expand its reach in Tulsa's economic development ecosystem. They see potential to play a larger role in new mobility and urban design, as well as becoming more technologically savvy.

What's Working



Parking

TPA has the reputation that it's serving the City of Tulsa well and accomplishing its mission.



Expanding Role

Issuing the Boulder Ave. mixed-use development proposal is a big step for TPA. This RFP was the first sustained and intentional effort for TPA to drive a larger development attached to its parking services. Though there were some bumps in the road, this development suggests a new future for TPA as a more active partner in the development ecosystem. TPA also assisted with the BMX project.

Areas for Improvement



Driving Development

The Boulder Ave. project is an auspicious sign that TPA can play a larger role in driving citywide development. TPA has an opportunity to be an active player in driving more substantial development.



Coordination with Other Entities

TPA, like the other entities in this strategy, is not deeply connected with the other authorities.

Tulsa Public Facilities Authority (TPFA)

Founded
1981

Type
Title 60 Public Trust

Mission Statement
To promote the acquisition, construction and operation of various facilities and public improvements in and for the City of Tulsa.

Board Structure
4 Mayoral Appointees and the Mayor/Mayoral Designee, approved by the City Council; 3-year terms

Authorizing Language

“The purposes of this trust are to provide, assist in providing, and to otherwise promote and encourage the development, redevelopment, renovation, and rehabilitation of such properties, real, personal, and mixed, and facilities as are necessary, and/or convenient to the performance of any governmental or proprietary purposes or activities of the City of Tulsa, Oklahoma. (Title 39, Chapter 16, Article 3, City of Tulsa, Mar. 16, 1982)

TPFA Overview

Formerly known as the Tulsa Civic Center Authority, the city renamed the authority in 1991 to reflect its greater purview over public facilities beyond the Tulsa Civic Center. It is a financing authority for the City and an enterprise authority for the operation of Tulsa's public facilities. TPFA stands legally separate from the City, even though it issues debt to finance capital projects.

Activities and Powers

- TPFA's current activities include*:
- Issuing revenue bonds
 - Owning One Tech Center (City Hall); reviewing and approving OTC leases presented by Asset Management
 - Leasing these facilities from the City and contracting with SMG to operate them:
 - BOK Center
 - Cox Business Center
 - Land Acquisition
 - Facility Development

TPFA possesses the following powers:

- Issues Capital Improvement Revenue Bonds
 - AA- Bond Rating (4/23/20)
- Manages the TPFA Arena & Convention Center Fund

Staff's Role

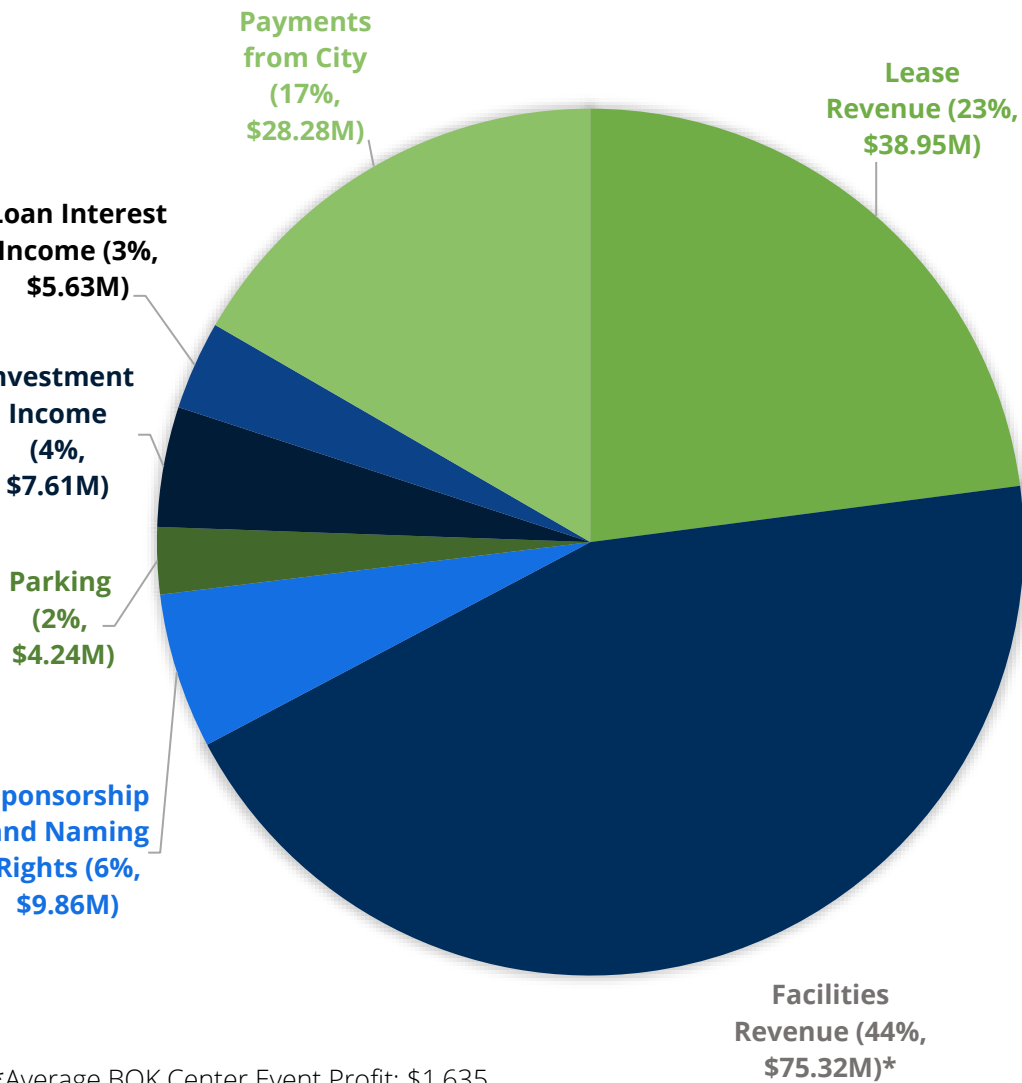
- City of Tulsa staff on a PT basis; no FTE

Board's Role

- Approval to issue bonds
- Receive guidance from Mayor's Office of Economic Development
- Review bids for bond sales
- Approve property acquisitions and contracts for services
- Manage TPFA Arena & Convention Center Fund
- Approve capital projects for each facility
- Review pending litigation
- Review financials for each facility

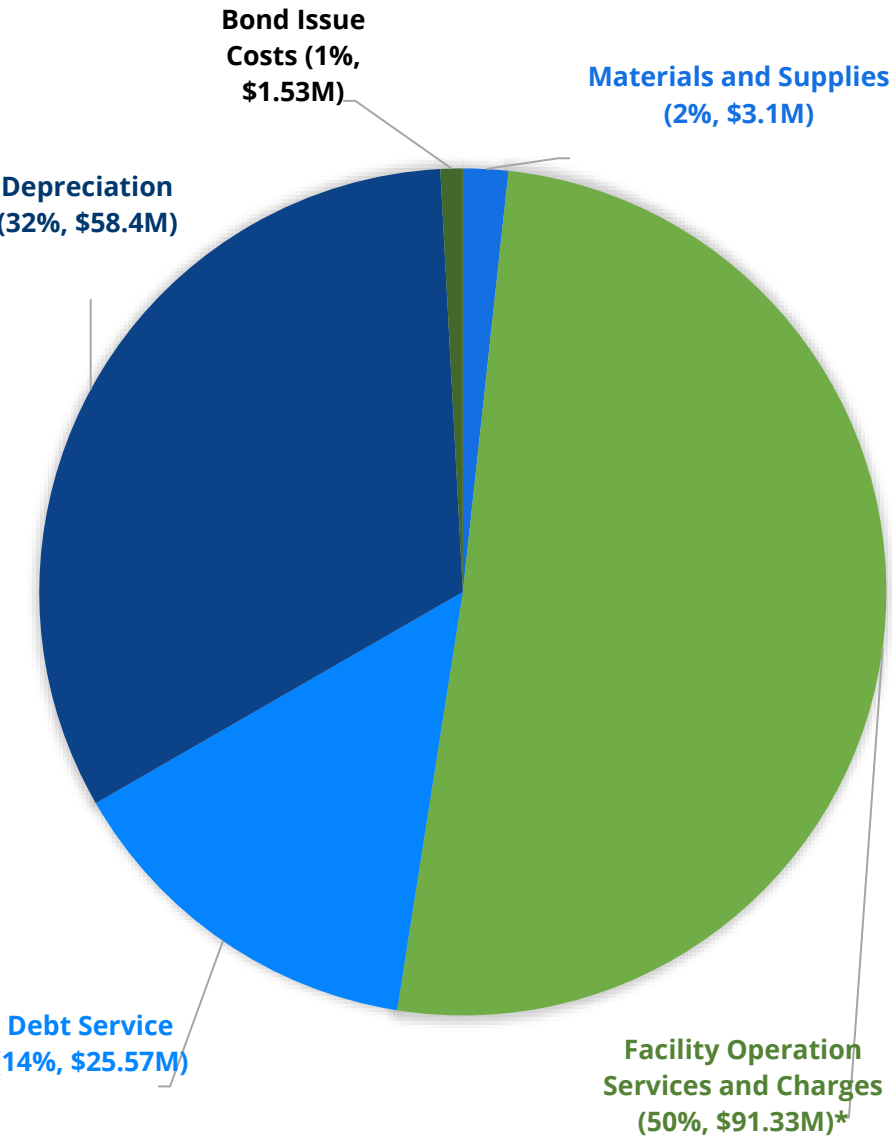
TPFA Revenue and Expenses: 2014-19

TPFA REVENUES: \$170.6M



*Average BOK Center Event Profit: \$1,635
Average Cox Convention Center Loss: \$19,391
(Source: Memo from Keith Eldridge to TPFA, Subject: FY 2020 TPFA Operating Budget, 5/1/2019)

TPFA EXPENSES: \$184.2M



Source: TPFA Financial Reports 2014-2019

Important Organizational Shifts



Major Loss of Institutional Knowledge

Within a matter of several weeks, both the former Executive Director and the Board Chair of TPFA passed away, and the organization lost decades of experience from their most dedicated stewards. The Mayor appointed Jim Coles and Kathy Taylor to the TPFA Board to start rebuilding the organization.

What's Working



Leadership

TPFA's board features several members who have decades of experience working in the City's economic development ecosystem



Financing Role

The City of Tulsa cannot take on long-term debt without approval from the voters. TPFA can issue that long-term debt to support city efforts, and often does. The City backs TPFA's bonds.

Areas for Improvement



Institutional Knowledge

Fundamentally, for TPFA to succeed long-term, the entity's leadership needs to rebuild institutional knowledge.



Partnership Opportunities

Because TPFA can issue substantial amounts of debt, it can offer Tulsa's economic development partners access to capital. As such, TPFA is a valuable partner and can play a significant role in coordination with the other entities.

Mayor's Office of Economic Development

Established
2014

Type
City Department

Mission Statement

To strengthen the economy and create shared prosperity for all Tulsans by developing and managing resources which spur business creation and expansion and facilitate new development and investment. Oversee operations of the Downtown Coordinating Council, leveraging the Stadium Improvement District to successfully maintain, improve, market and develop Downtown Tulsa as a vibrant center for living, commerce, arts, entertainment and education. Ensure timely and effective development processes through oversight of meaningful collaboration with the Development Services Department.

Since the commencement of this study, the Mayor's Office of Community Development & Policy (MOCDP) has been reconfigured and other City departments have absorbed MOCDP's staff. Despite the organizational shift, the focus of these employees' work has not changed.

AIM Pillars

- 1) Increase the availability of quality employment opportunities.
- 2) Ensure Tulsans are prepared for current and future career opportunities.
- 3) Build a foundation for upward mobility through efforts to maximize disposable income and reduce cost burdens.
- 4) Spur and facilitate investment and development that increases the quality of life for Tulsans.

MOED Overview

MOED is the primary economic development body in the City. MOED Chief is the city's liaison to each of the authority boards.

Mayor Bynum resuscitated MOED after he took office. His predecessor, Mayor Bartlett primarily contracted with the Tulsa Chamber to lead economic development initiatives.

Current Programs

- MOED runs and supports several substantial programs in Tulsa including:
- Downtown Redevelopment Fund
 - Economic Development Infrastructure Fund
 - Tax Increment Financing
 - Opportunity Zone
 - Retail Incentives
 - Brownfield Programming
 - Downtown Coordinating Council
 - Commercial Revitalization Strategy
 - Business expansion, retention, and attraction efforts and project implementation for successful efforts.
 - Small Business Enterprise Program

MOED People

Kian Kamas

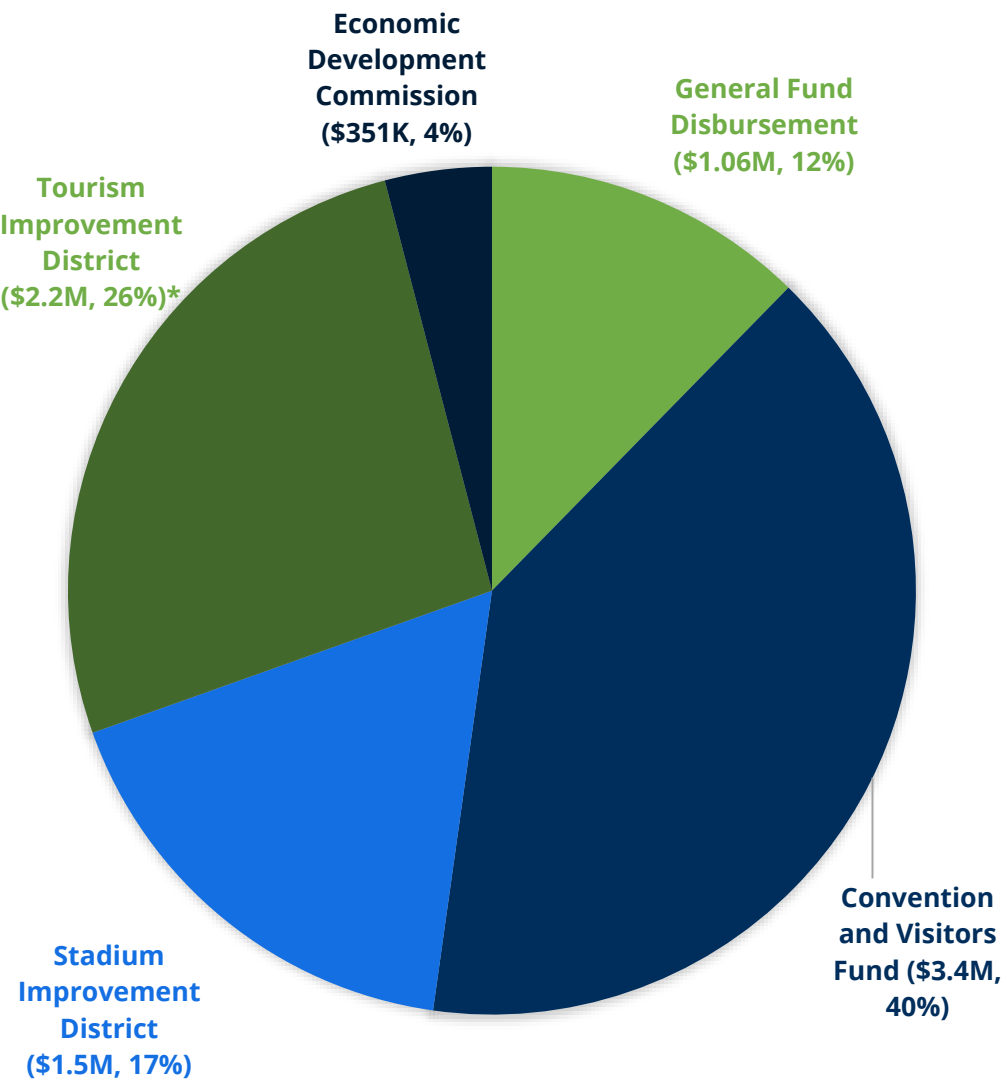
Kian Kamas serves as Chief of Economic Development for the City of Tulsa. In this role she is responsible for directly managing a team of ten staff who focus on managing and developing tools and programs crucial to successful economic development and supporting existing industry and new business prospects seeking to invest in Tulsa. She is responsible for oversight of Development Services, Tulsa Parking Authority, and Downtown Coordinating Council. Ms. Kamas previously served as VP of ED for the Tulsa Regional Chamber.

Jim Coles

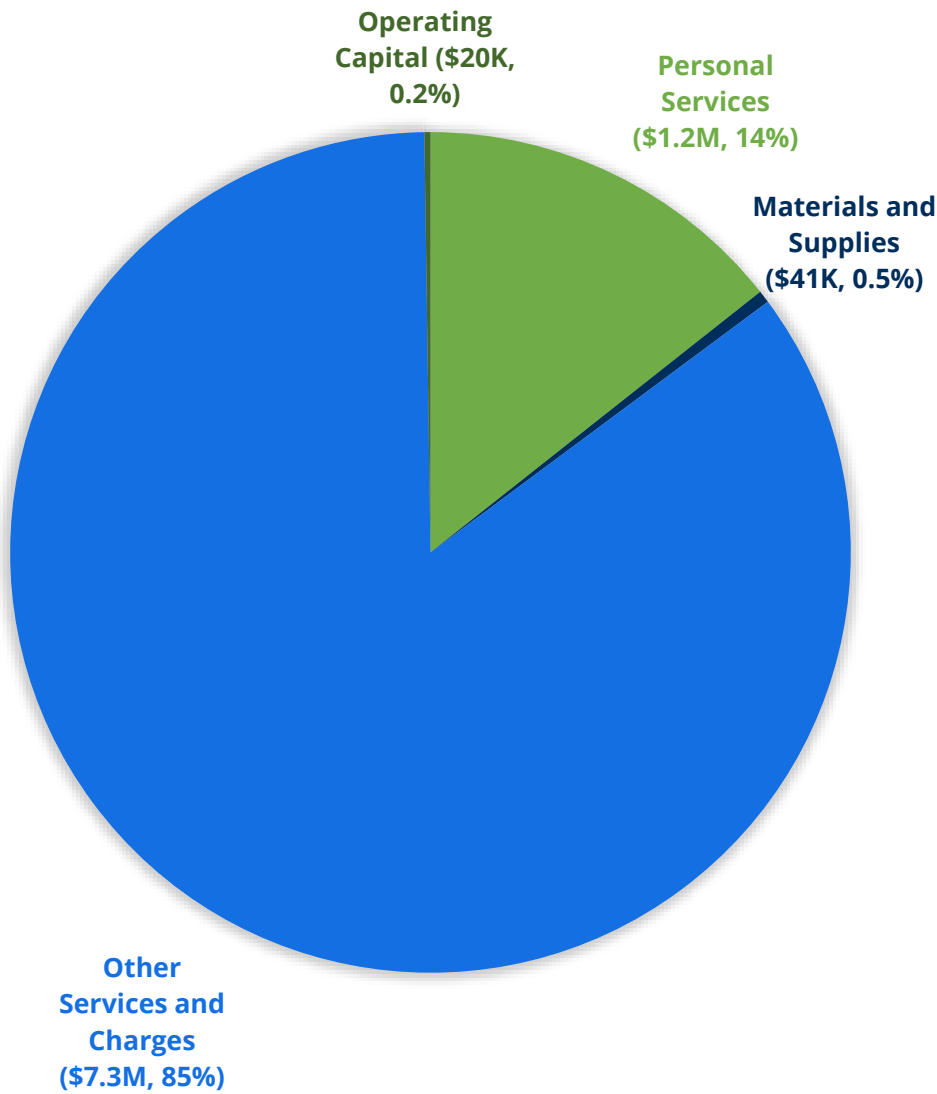
Jim Coles serves as the Director of Economic Development. He coordinates, plans and implements public-private partnerships. He focuses primarily on public assistance to appropriate projects that move Tulsa in a positive direction. He is also the Executive Director for the Tulsa Industrial Authority and has worked in the Tulsa economic development sphere for decades.

MOED Revenue and Expenses: FY2019-20

MOED BUDGETED REVENUES: \$8.62M



MOED BUDGETED EXPENSES: \$8.62M



*Legal challenge to TID prevented implementation. The corresponding expenses are captured in "Other Services."
Source: City of Tulsa Budget, FY 2019-20

Mayor's Office

Additional Programs & Staff

Organizational Shift

Since the commencement of this study, the Community Development and Policy team within the Mayor's Office has been reconfigured, and other City departments have absorbed these staff.

Current Programs

The Mayor's Office runs and supports several substantial programs in Tulsa:

- Vision Tulsa
- Affordable Housing Strategy
- Improve Our Tulsa I and II Plan Implementation
- Transit and Mobility
- Education
- Tourism
- Greenwood District Redevelopment
- Race Massacre Commemoration
- Destination Districts (with INCOG/Tulsa Planning)
- Resilient Tulsa
- New Tulsans Initiative

Notable People

Ashley Philippsen

Ashley was the Deputy Chief of MOCDP and recently shifted over to MOED. She provides dedicated support to the 1921 Tulsa Race Massacre Centennial Commission and works closely with the Chief Resilience Office to implement Resilient Tulsa.

Becky Gligo

Becky is the Housing Policy Director and currently reports to the City's Chief Administrative Officer. Gligo is responsible for achieving key outcomes of neighborhood revitalization and affordable housing preservation and development.

Mayor's Office & MOED: What's Working



Downtown Development

Many stakeholders we interviewed considered downtown development a success. There are plenty of new businesses, restaurants, retail options, housing, and public amenities that have revitalized downtown and brought a new energy to Tulsa's core.



Trust Among Partners

Between the city's departments, commissions, and authorities, there is a trust and respect among partners. They intend to align and act in tandem after this study is complete. In addition, there is faith in the city's direction, in the Mayor, and other city leadership to take economic development in the appropriate direction to expand opportunity and quality of life for Tulsans.



Focus on Equity

The City has commissioned several studies to understand its equity gaps and disparities. The City is focused on improving outcomes and enhancing measures to achieve greater equity across the City. While there is still room to improve, the city is trying to reckon with its difficult history and the equity questions that emerge from it.

Mayor's Office & MOED: Areas for Improvement



Outcomes Negotiating with Major Employers

The City has historically offered excellent deals on property leases to local major employers to the City's detriment. The City is currently trying to re-negotiate these deals to increase the revenue it receives. The revenue from these deals can help the City expand its programming, especially its equity programming.



Finding the Balance Between Market and Equitable Growth

The Mayor mentioned that he is particularly interested in an Urban Wealth Fund model that maximizes the profit and realization of value from city assets. The City does not yet have an established framework that spell out how to balance equity and asset value maximization.



Coordination Between the City and the Entities

Mayor's Office and MOED leadership have made great strides in building personal relationships with and between leaders at the different entities and have begun to improve coordination between actors. However, their leaders aspire to achieve greater alignment. Mayor's Office and MOED staff and leadership are the center of the entire ecosystem of actors. As such, they can drive efforts at collaboration.

TULSA'S ECONOMIC DEVELOPMENT FRAMEWORK

*Providing an Organizational Structure and Strategy for
the City and its Authorities, Boards, and Commissions*

December 2020