PLANiTULSA:
Tulsa Comprehensive Plan Update

Implementing the Community's Vision

June 16, 2008

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Vision

What is Vision?

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Chicago

Chicago World's Fair

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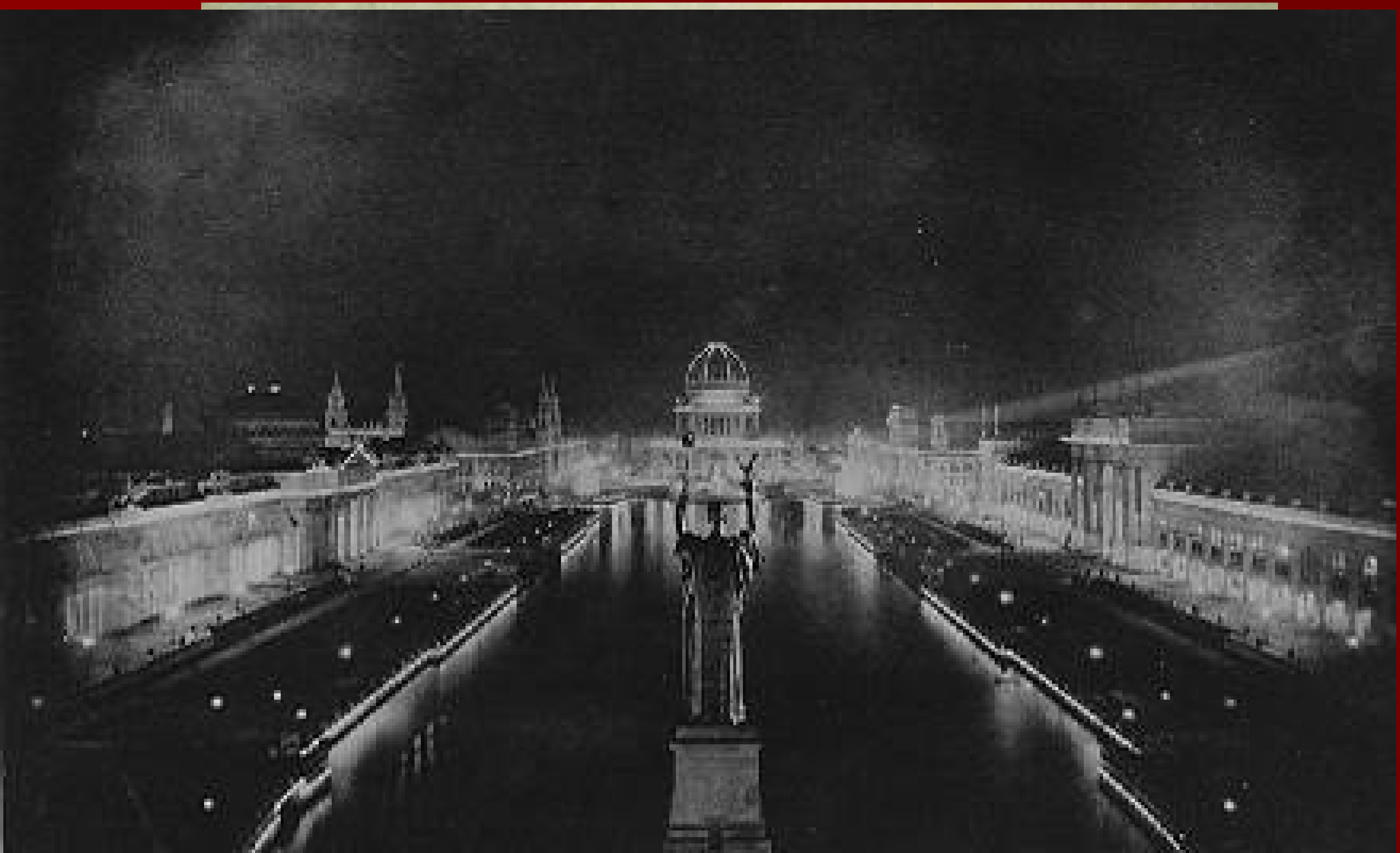
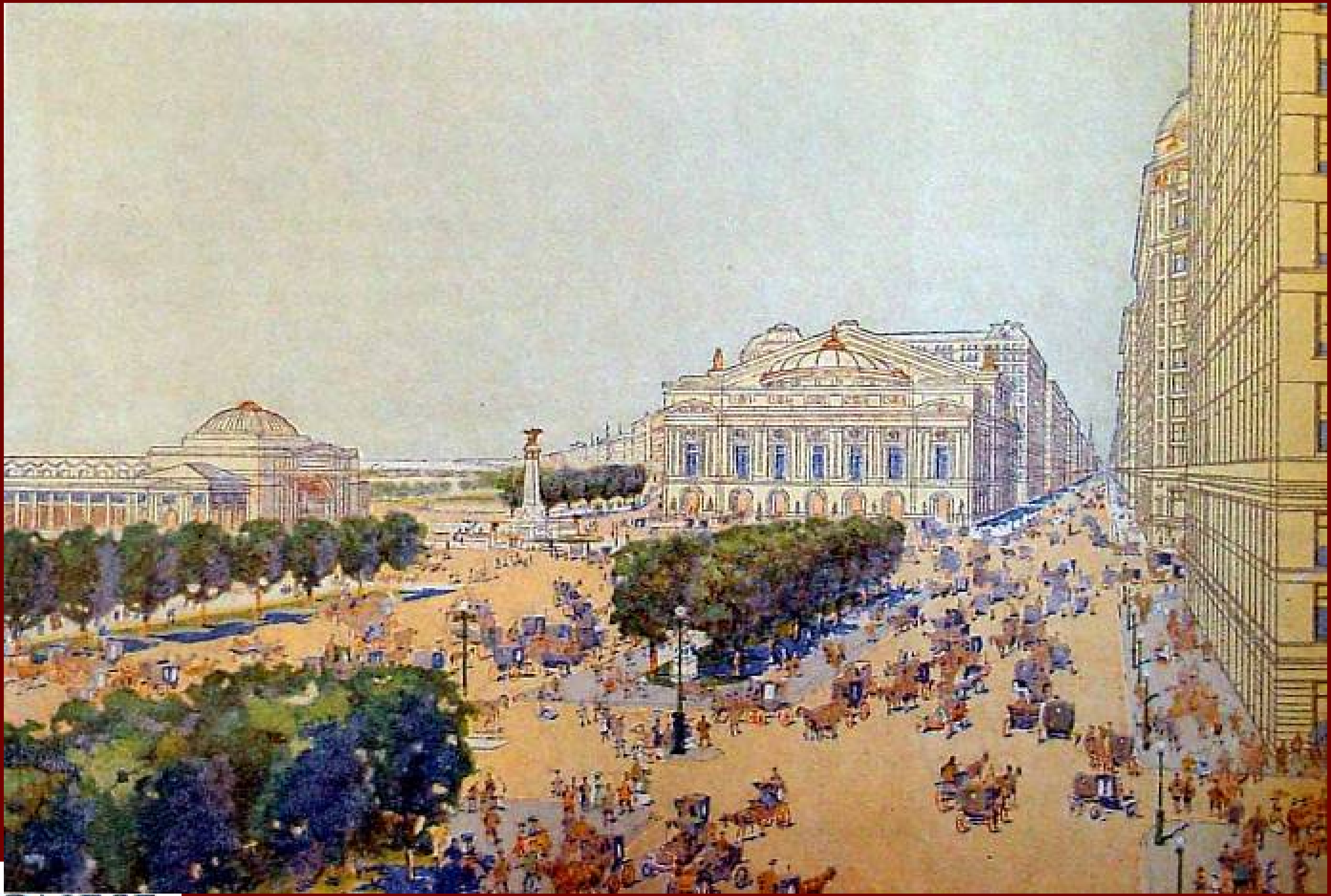
Chicago World's Fair



The Plan of Chicago 1909



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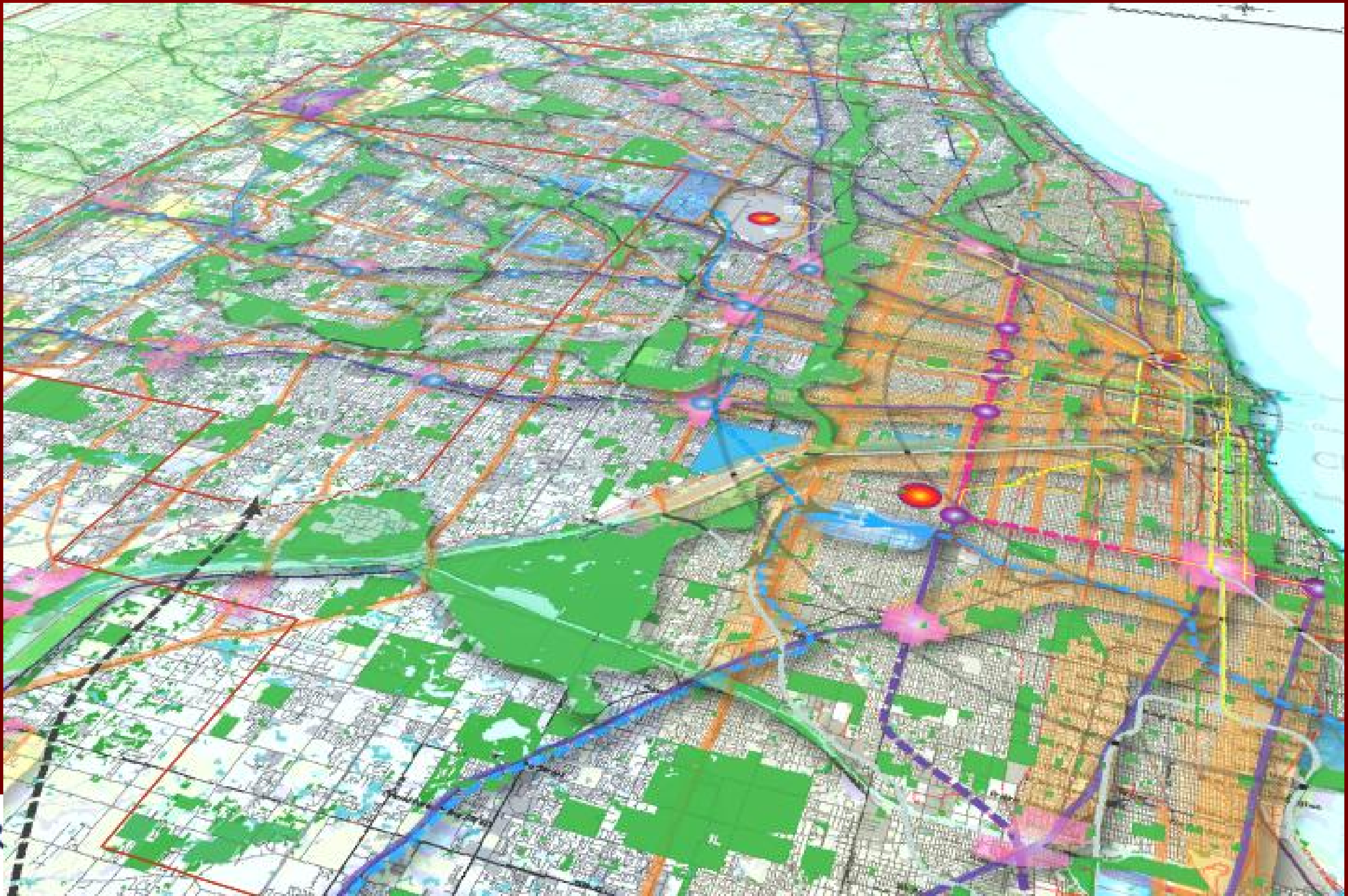
Chicago Metropolis 2020

One Region. One Future.

The Metropolis Plan



Chicago's Rules for a Great Plan

- Timing
- Vision
- Well Considered Plan
- Excellent Communication
- Direct Large Capital Investments
- Access to the Levers of Power
- Leadership and an Army of Supporters

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The future will not be like the past, nor the present

Demographic Shifts

- Growth concentrated in 55+ ages and 15-34 – Different housing demand
- These shifts will result in more multi family and mixed use growth.

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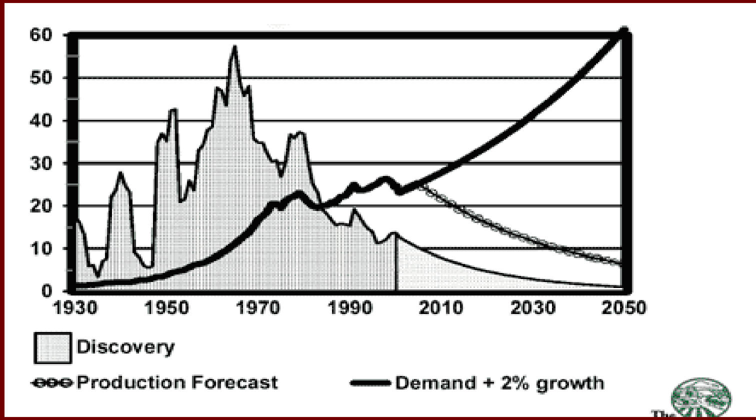
What We Can Expect?
Oil costs will continue to rise
Concern for climate change will lead to scrutiny of carbon emissions



Trends

Strong forces will put a premium on:

1. **Energy Efficient, sustainable cities**
2. **Shorter Trips**
3. **Effective Transit**
4. **Great Livability**
5. **More Options fro Travel, Housing and Work**

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Many Cities will compete to be great places to live & work

Traditional Planning Approach

- **D**ecide – through analysis and research
- **E**ducate – the public about the solution
- **A**nnounce – the plan
- **D**efend – the plan

Traditional Planning Approach

- **D**
- **E**
- **A**
- **D**

Improved Process

PLAN

FUND

BUILD

Improved Process

VALUES ***(What do people want?)***

VISION ***(How will our City provide it?)***

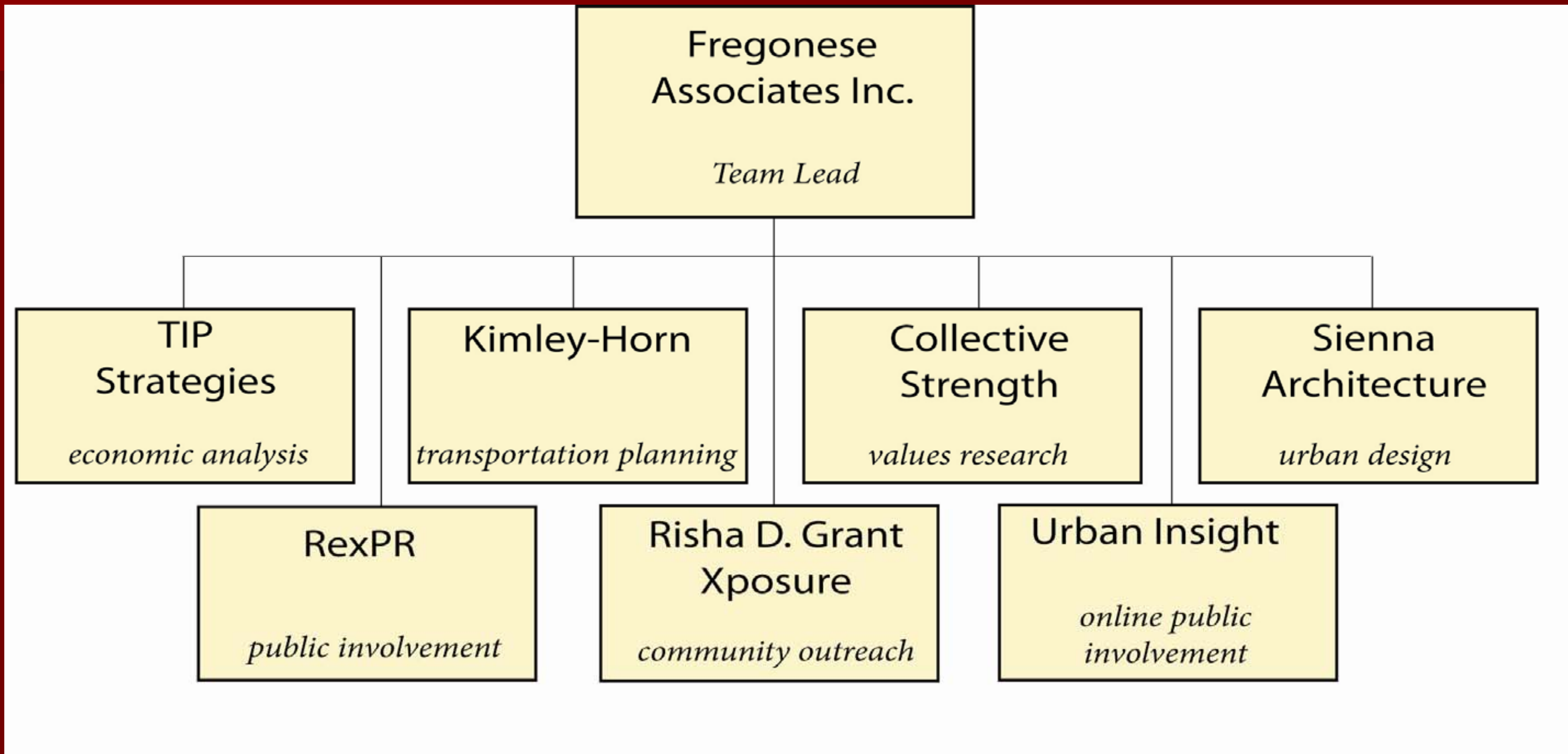
STRATEGY ***(How do we implement?)***

PLAN

FUND

BUILD

Team Organization Chart



Information Gathering and Kick-off Meeting

Get to know the city through the eyes of Tulsa residents.

- Land Use: Visual analysis of land use types
- Housing: Housing market analysis
- Economic Assessment

Photo: Daniel Jeffries

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Polling and Stakeholder Interviews

- 85 In Depth Interviews
- 1,000 Phone Interviews
- 1,000 Web Based Poll
- 20 “Person on the Street”

Working with Stakeholders

- Advisors
- Partners

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Community Workshops

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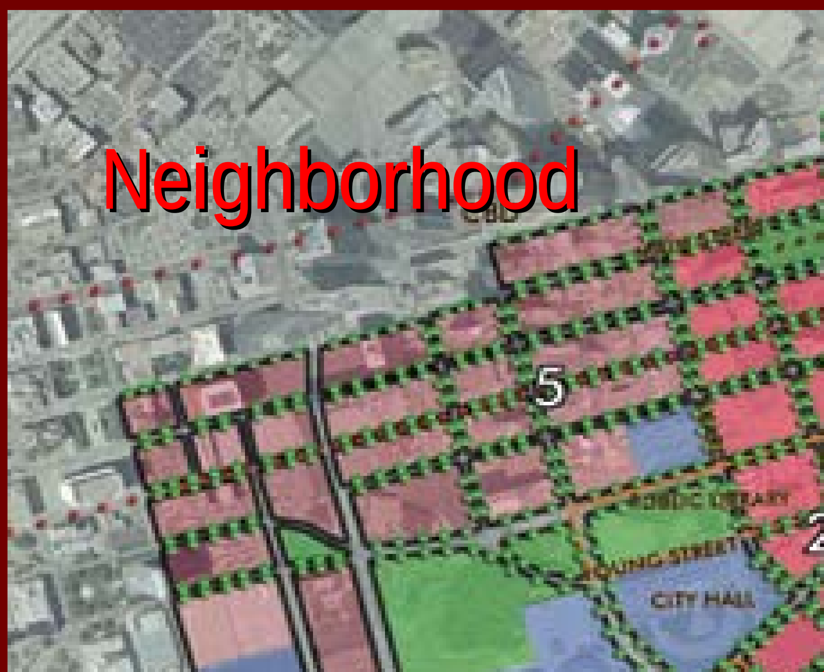
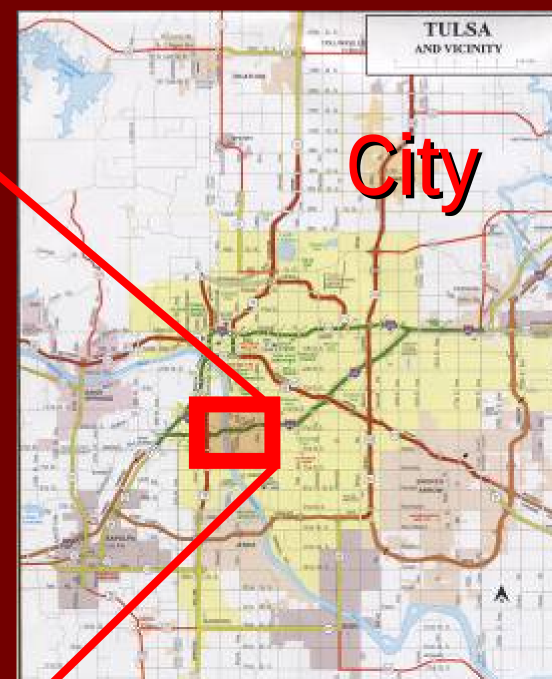
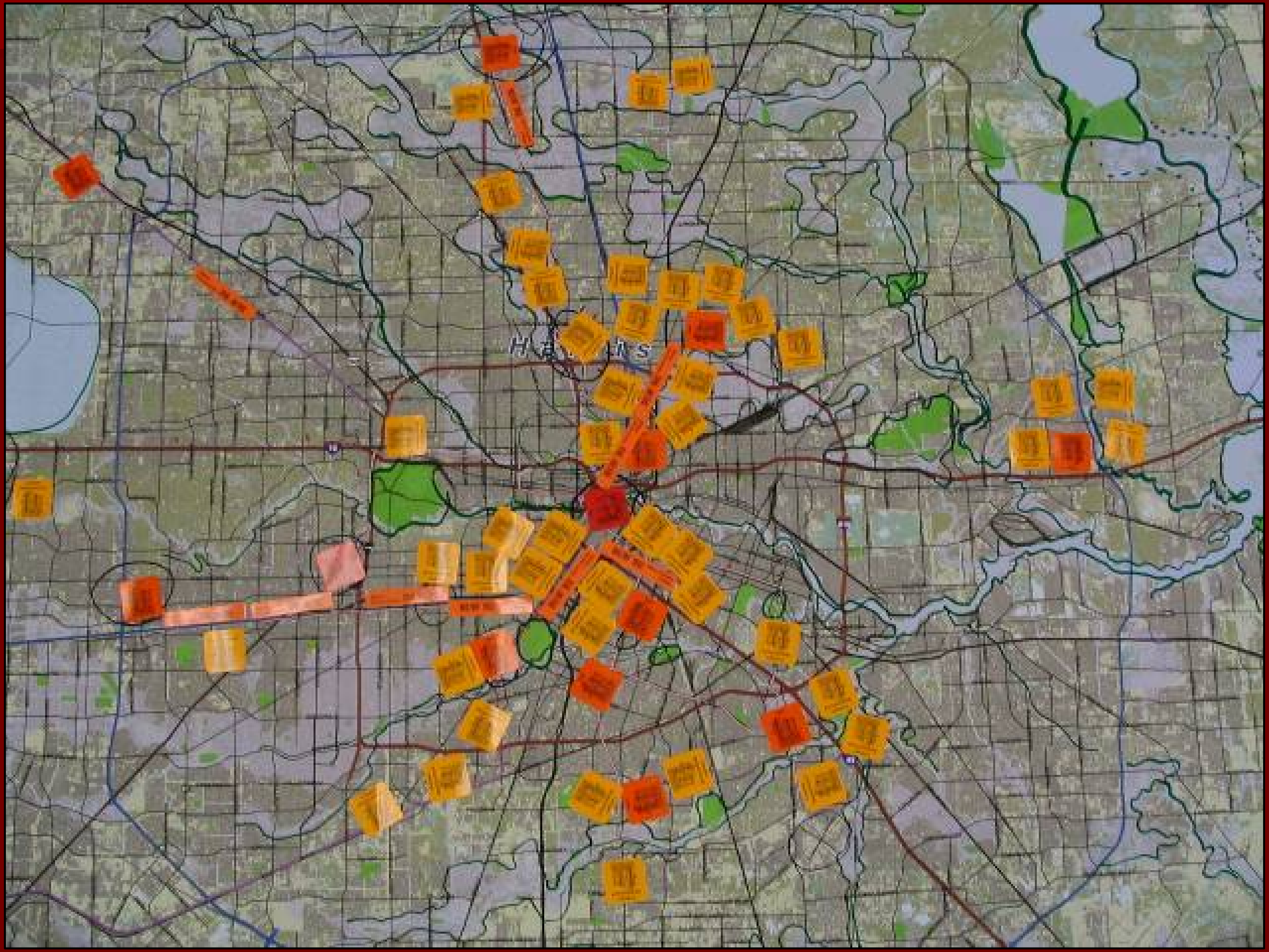
Workshop Video

Two Scales – City and Neighborhood





Workshop Maps



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Each table's plan is analyzed and recorded...

....and all notes and comments are recorded

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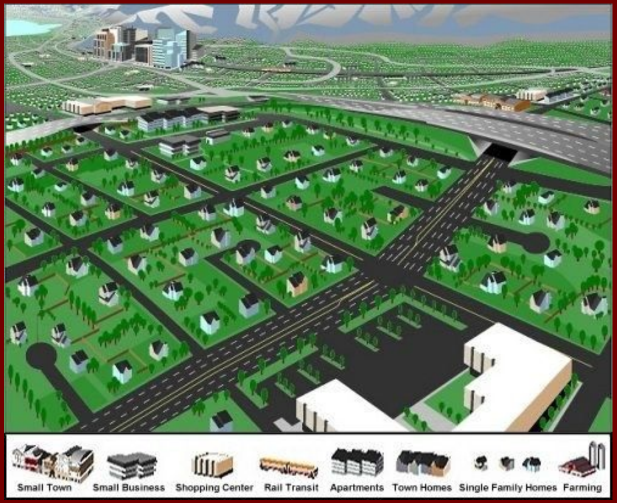
Traditional Approach

The Present



The Future

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Scenario Approach

Plausible stories about the future

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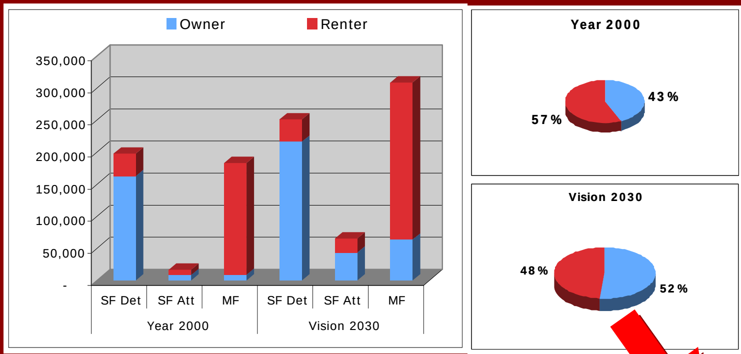
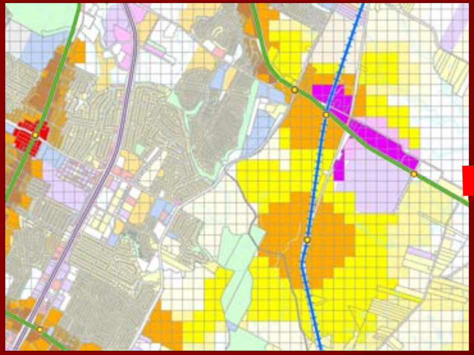
Modeling the Scenarios



Market Constraints
Development Program
Commercial Demand
Housing Needs

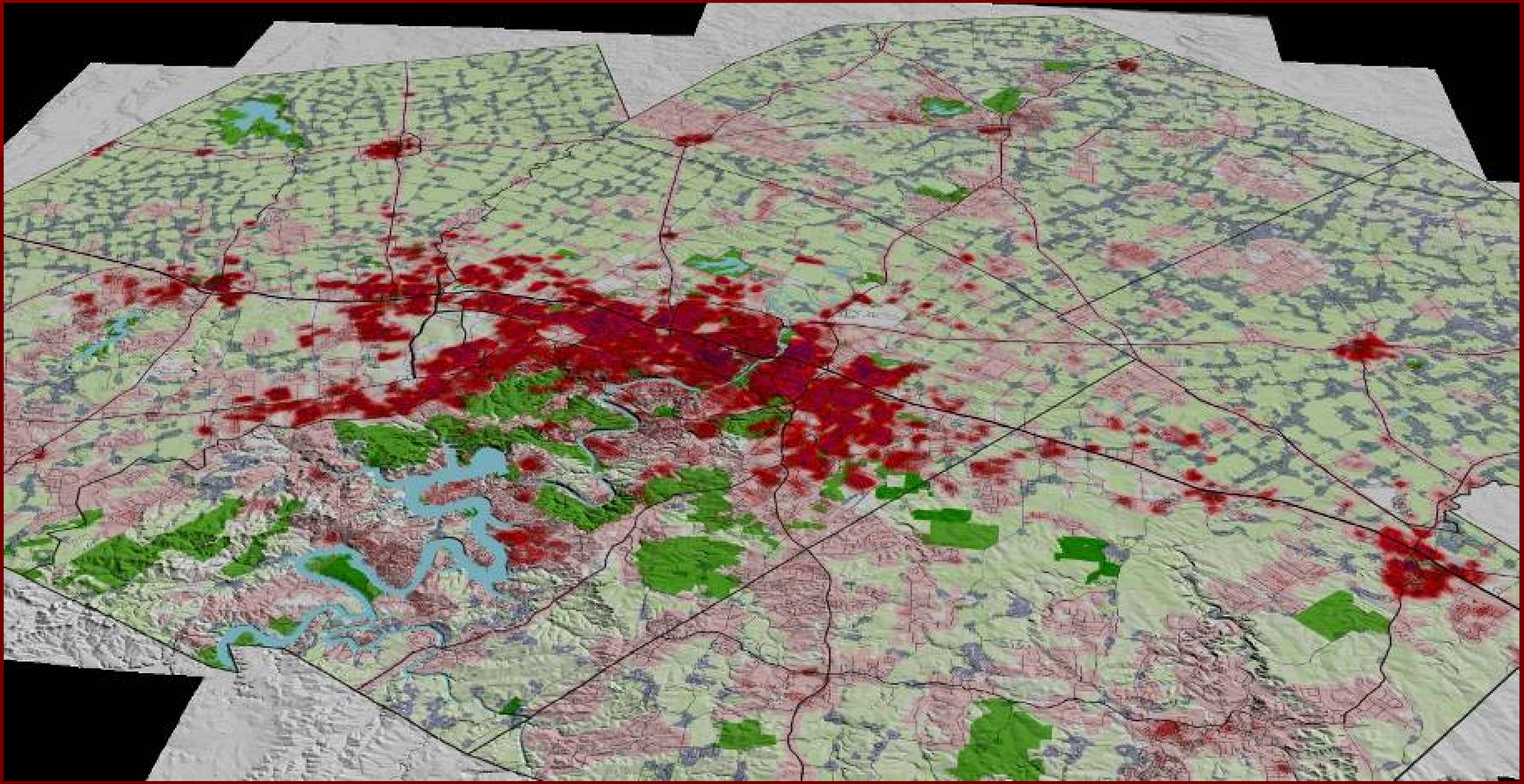
Sustainability
Urban Design



Land Use Scenario
Development

Transportation Analysis
Roadway Impact
Ridership

Existing Conditions



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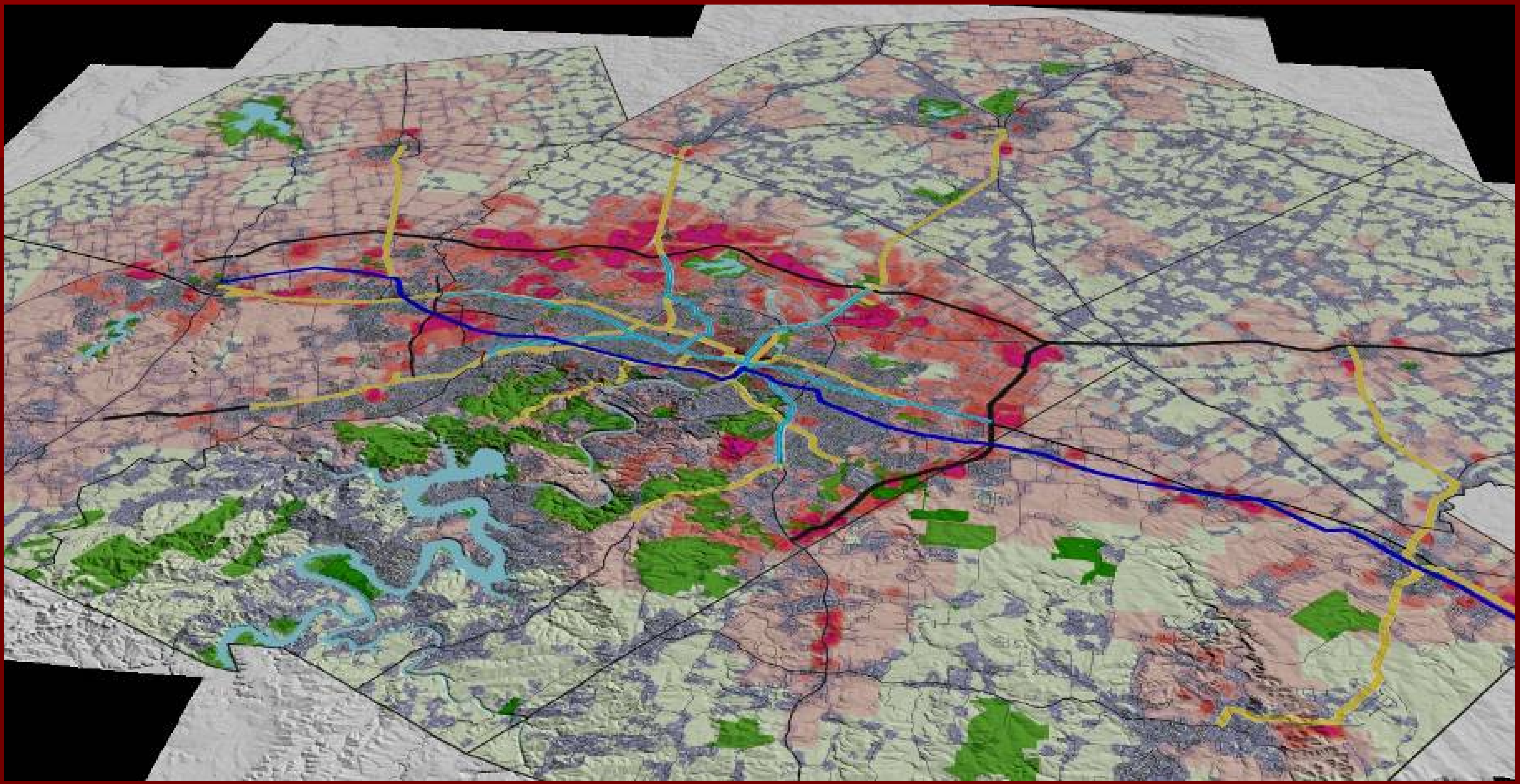
Scenario A



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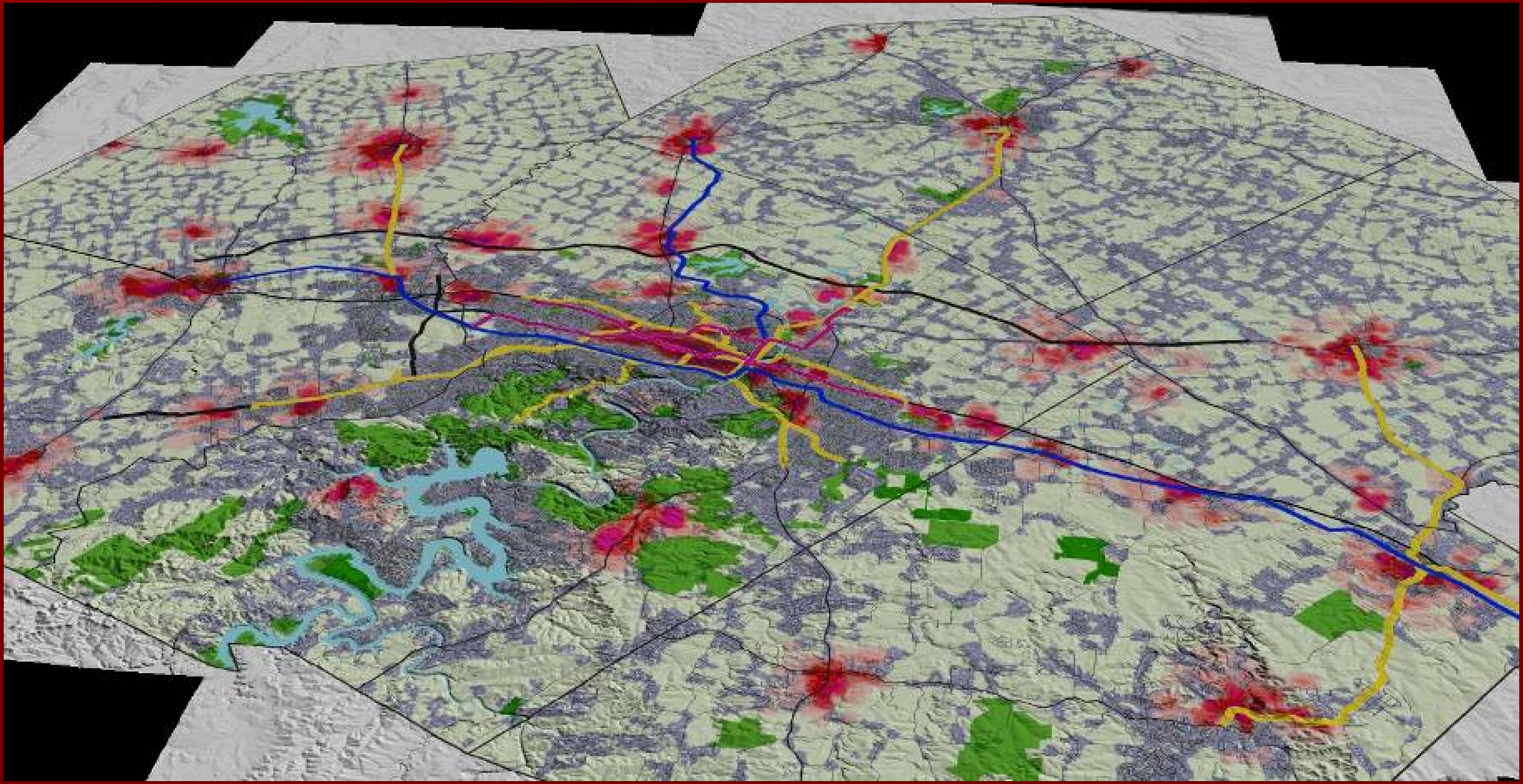
Scenario D



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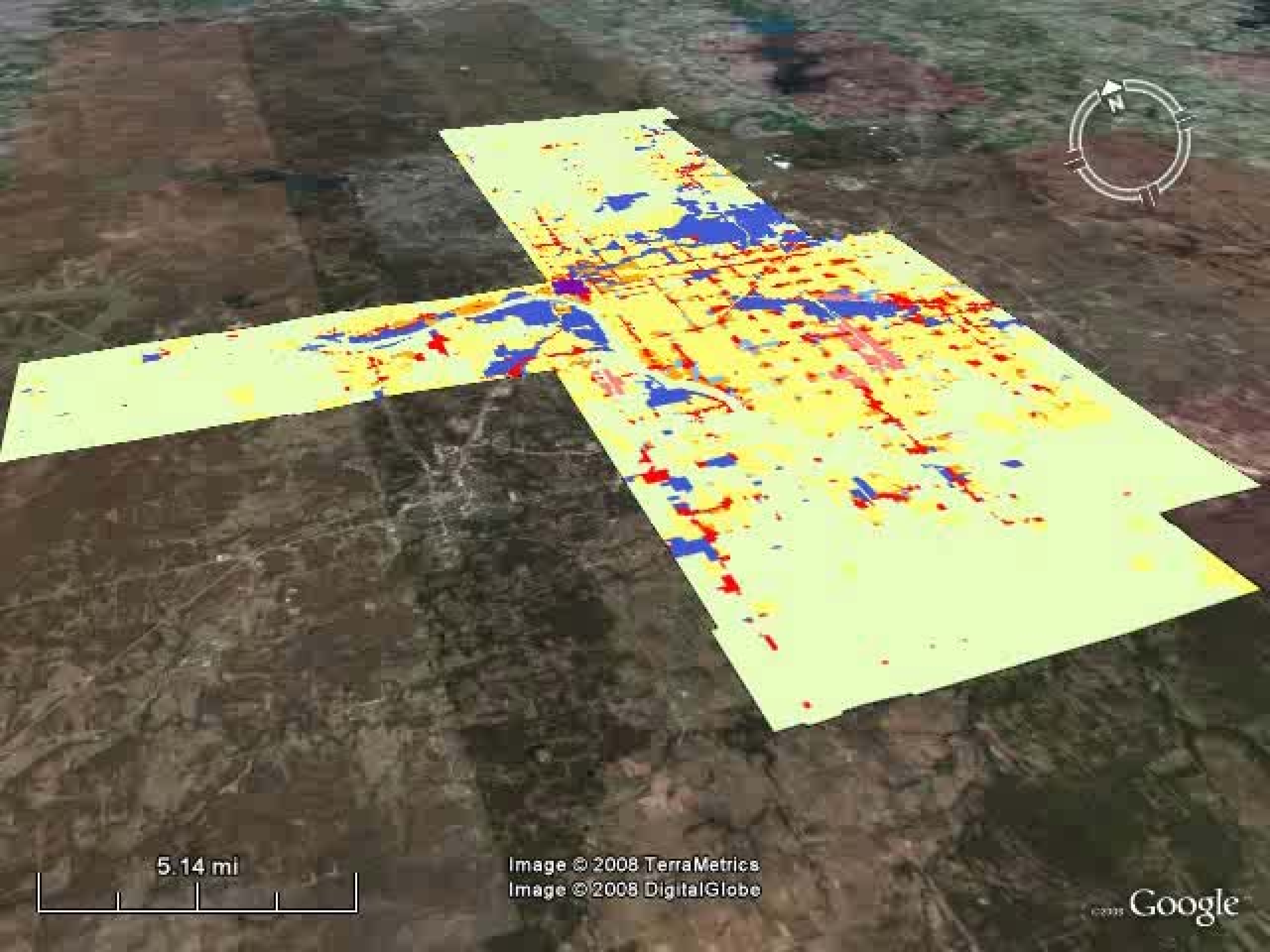
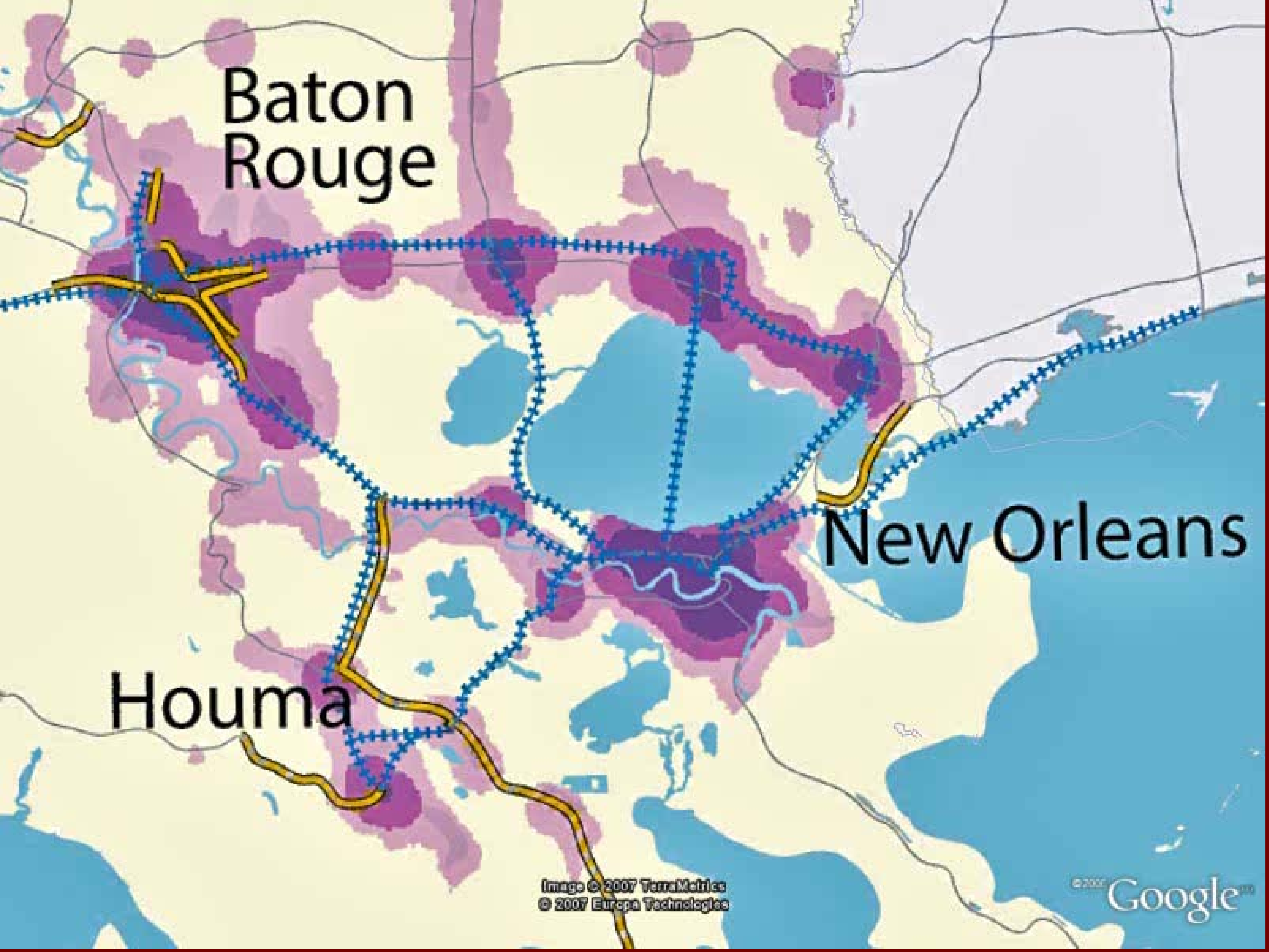

5.14 mi
Image © 2008 TerraMetrics
Image © 2008 DigitalGlobe
Google



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Indicators for Scenario Evaluation

Topic	Scenario A	Scenario B	Scenario C	Scenario D
Agricultural Land Consumed: 1998 - 2020	174 sq mi	143 sq mi	65 sq mi	43 sq mi

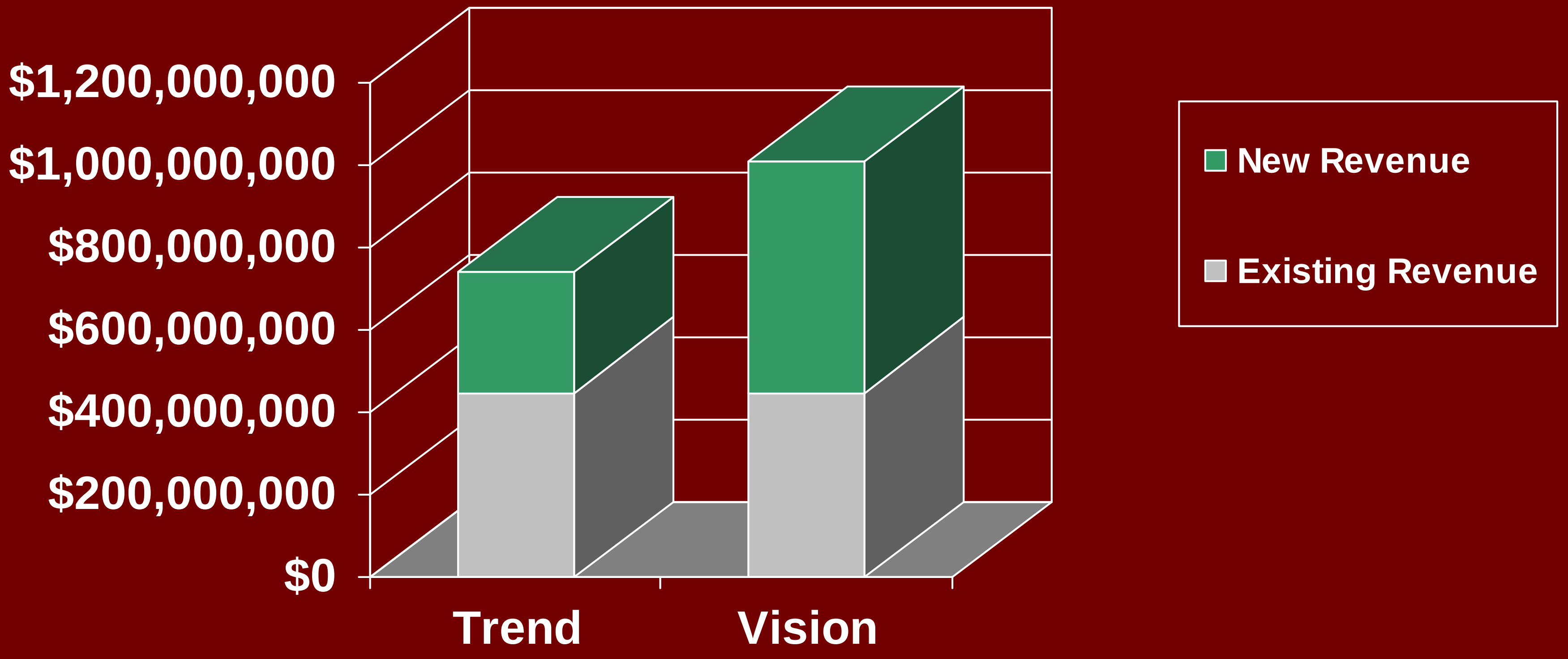
Topic	Scenario A	Scenario B	Scenario C	Scenario D
Infrastructure Cost 1998-2020 (Transportation, water, sewer, utilities)	$38 billion $$$$$	$30 billion $$$$	$22 billion $$$	$23 billion $$$$

Topic	Scenario A	Scenario B	Scenario C	Scenario D
Single Family Homes vs. Condos, Apts. & Townhomes	SF 77% Condos, etc. 23%	SF 75% Condos, etc. 25%	SF 68% Condos, etc. 32%	SF 62% Condos, etc. 38%

Topic	Scenario A	Scenario B	Scenario C	Scenario D
Transportation Choices				

Fiscal Model Results

City Sales Tax Revenue Increase - 2000 Dollars



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Broad Outreach and Multiple Opportunities for Response

What We’ve Learned

- Vision
- Without action
- Is Hallucination

Lessons from Scenarios and Outreach Used to Develop Plan and Products

<u>Components</u>

- Vision
- Comprehensive Plan
- Development Strategies
- Implementation and Financial Strategy

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Upcoming Events

- July 2008 - Community Values
- September 2008 - City Wide Workshops
- January 2009 - Community Workshops
- April 2009 – Scenarios – public response
- June 2009 - Vision
- September 2009 – Draft Plan & Implementation
- Adoption Hearings – October – December 2009

What the partners will do

- Review preliminary data - Help promote Citywide Workshops
- Review first results - Help recruit best locations for community workshops
- Review workshop results and advise on scenarios to be tested
- Review scenario results and advise on Vision
- Review and advise on Plan
- Review and advise on Strategies

What the advisors will do

- Meet on a monthly basis
- Function as an executive committee for the partners
- Review and advise on more details

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- Questions and Discussion

Preliminary Data

- Land Use and Population Forecasts
- Preliminary IDI and Survey Results
- Economics
- Transportation

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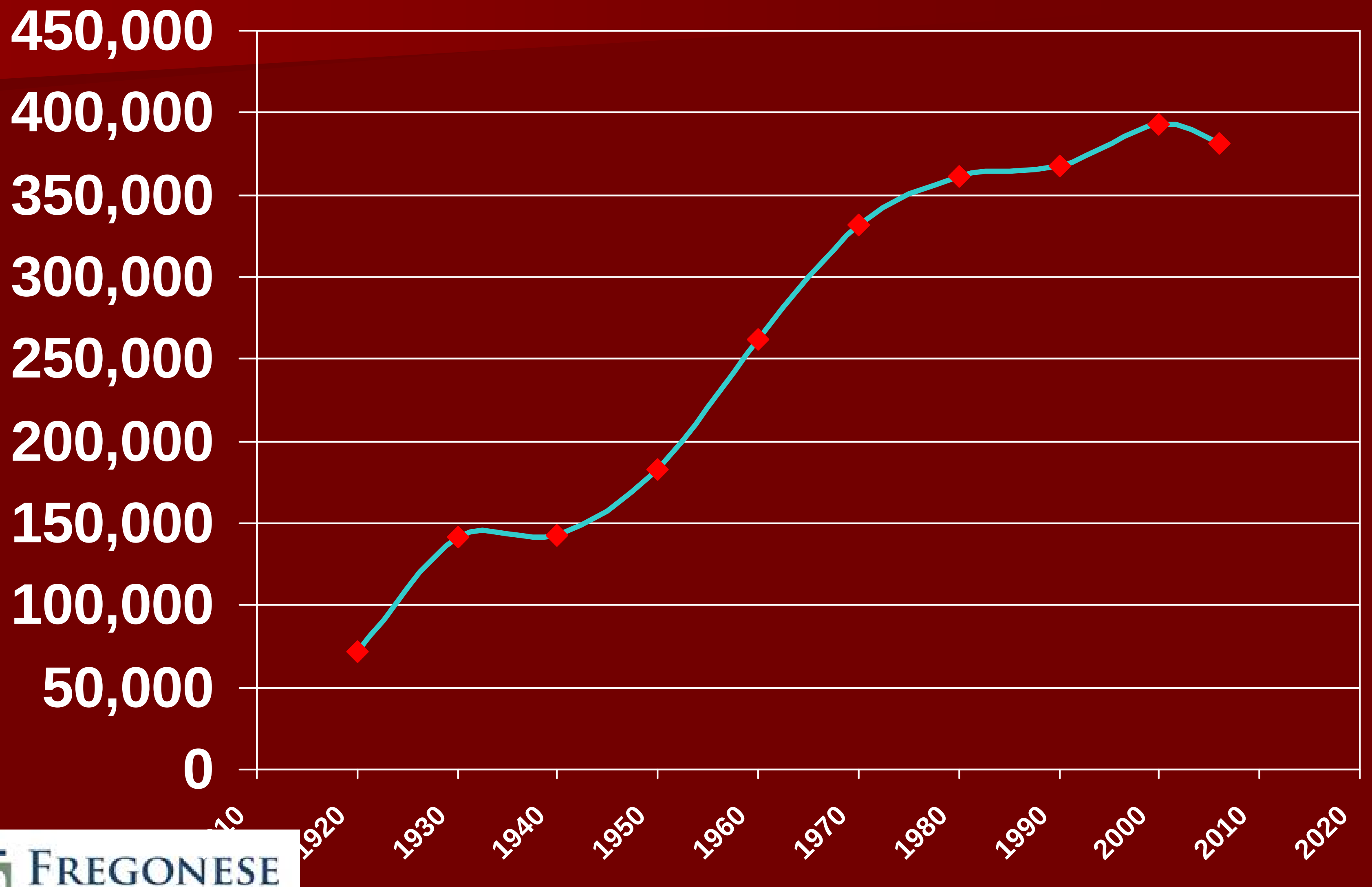
Tulsa Population Trends



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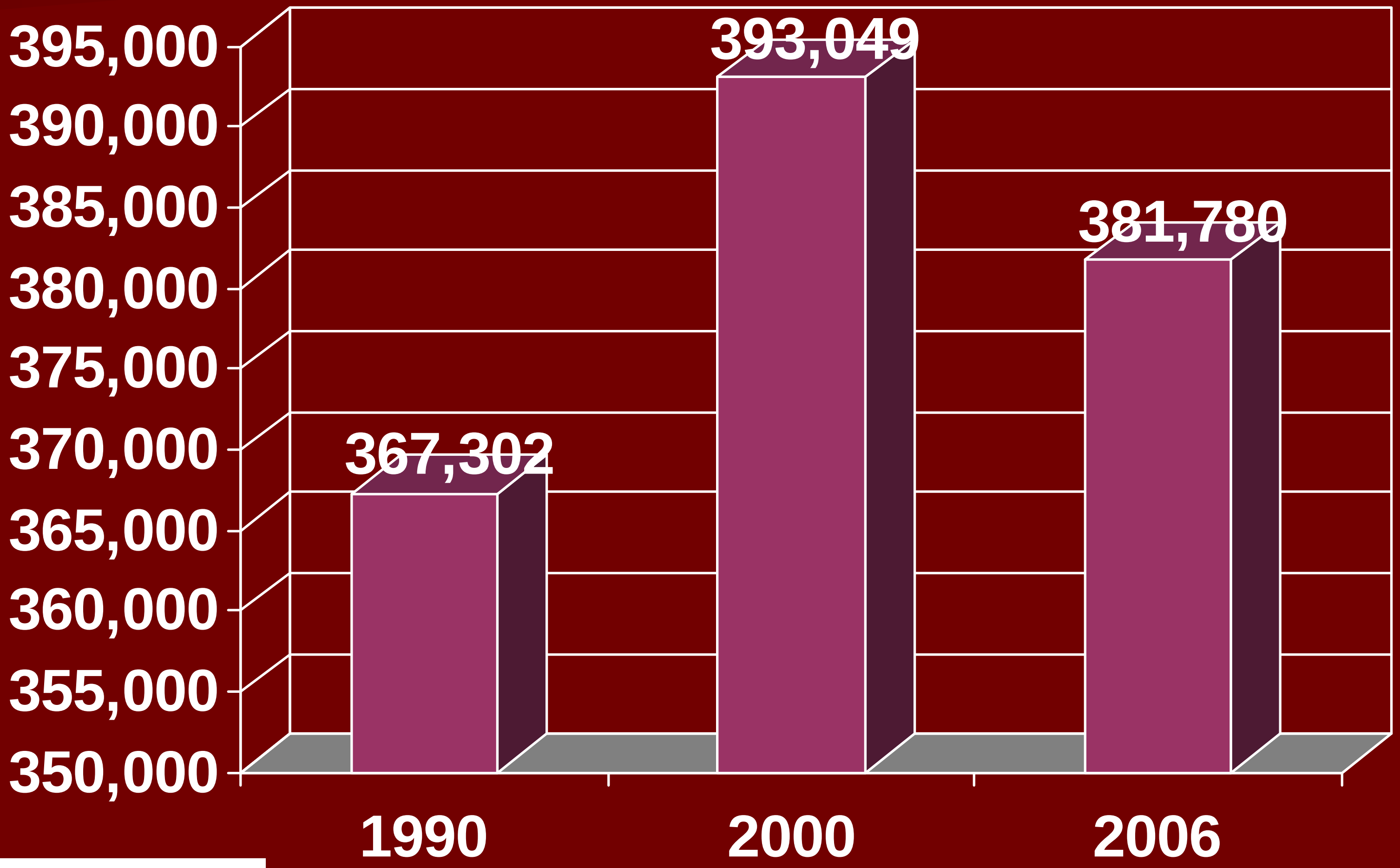
Population – City of Tulsa



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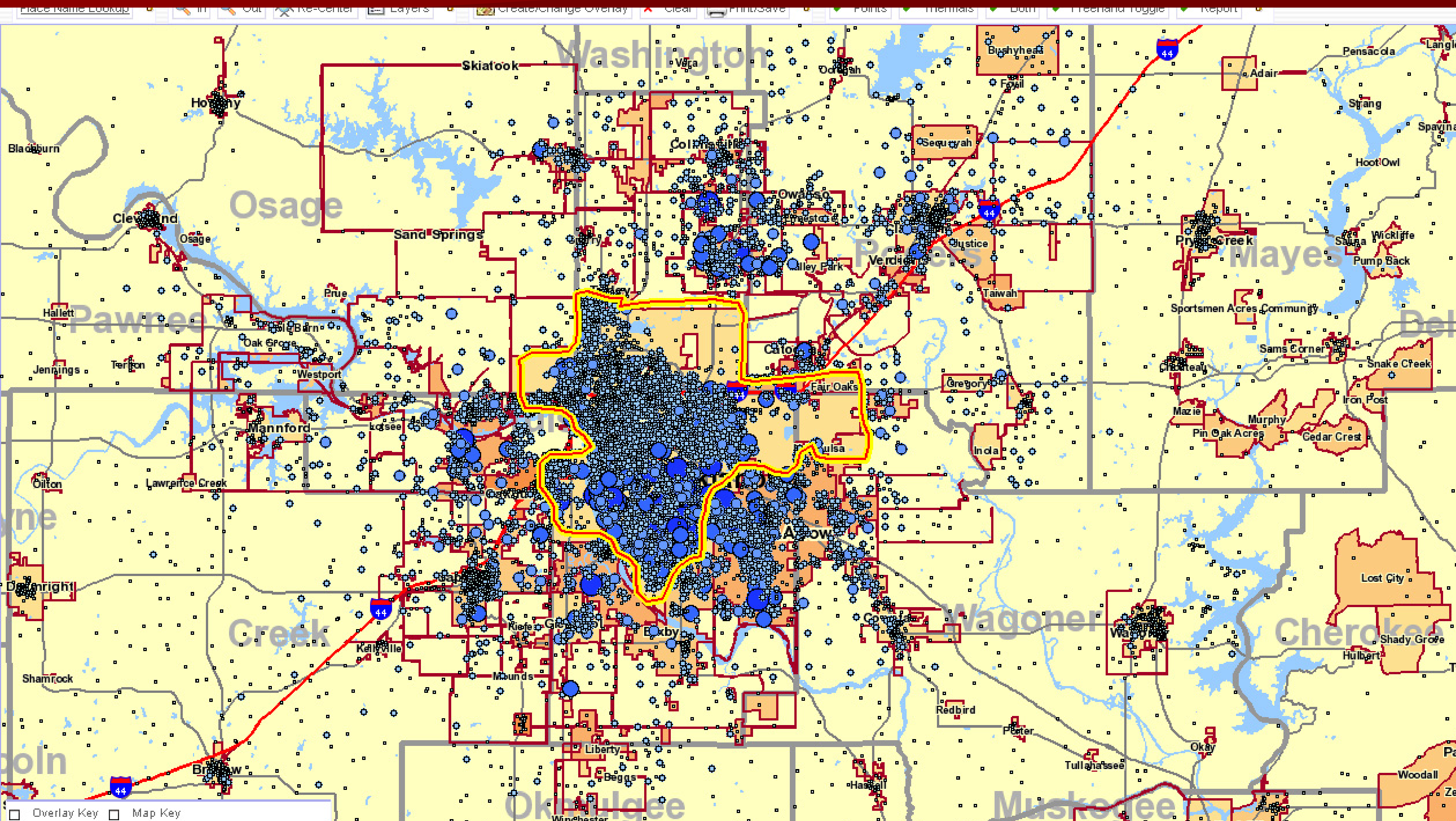
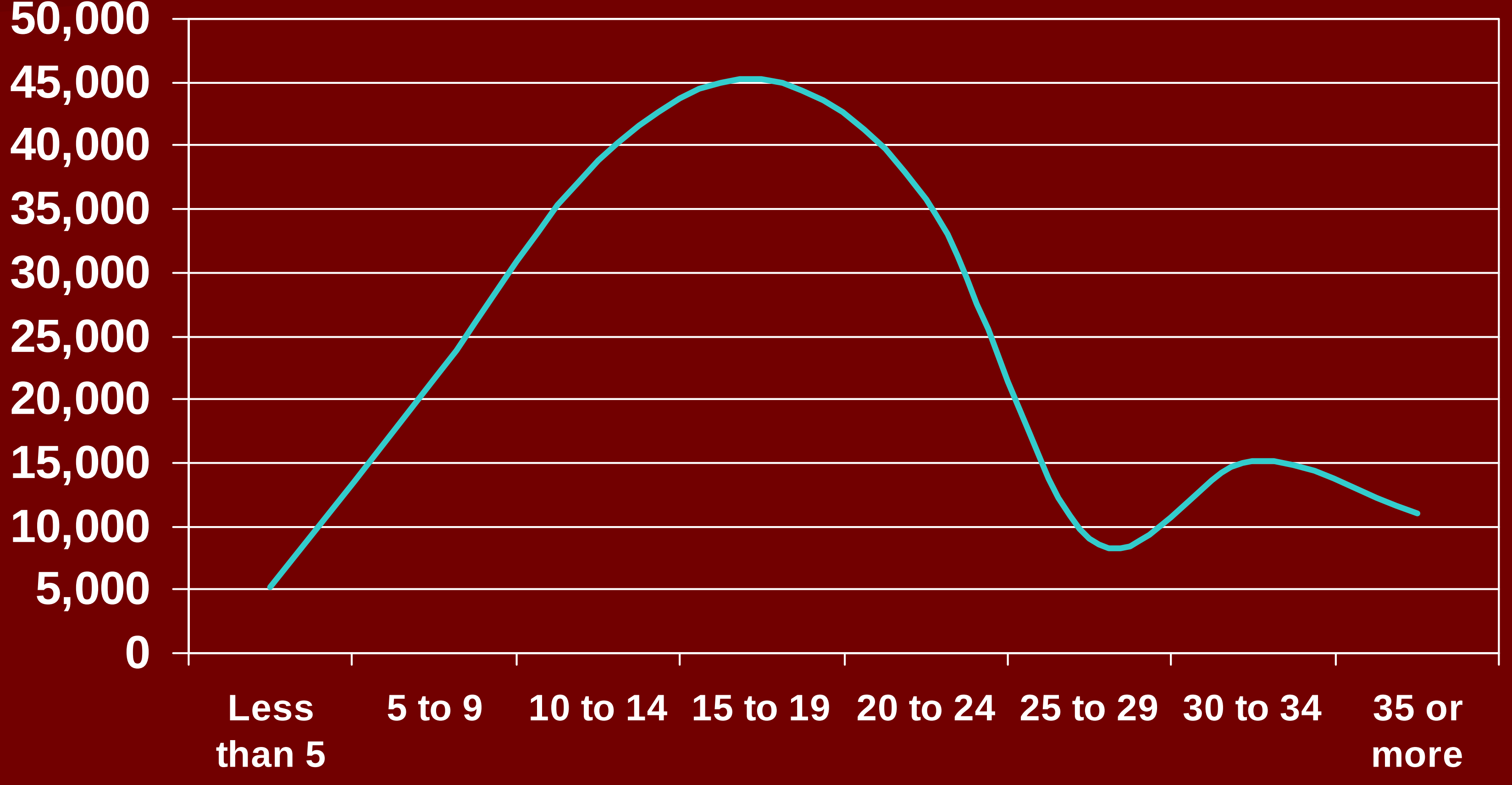
Where People Work



Travel Time to Work



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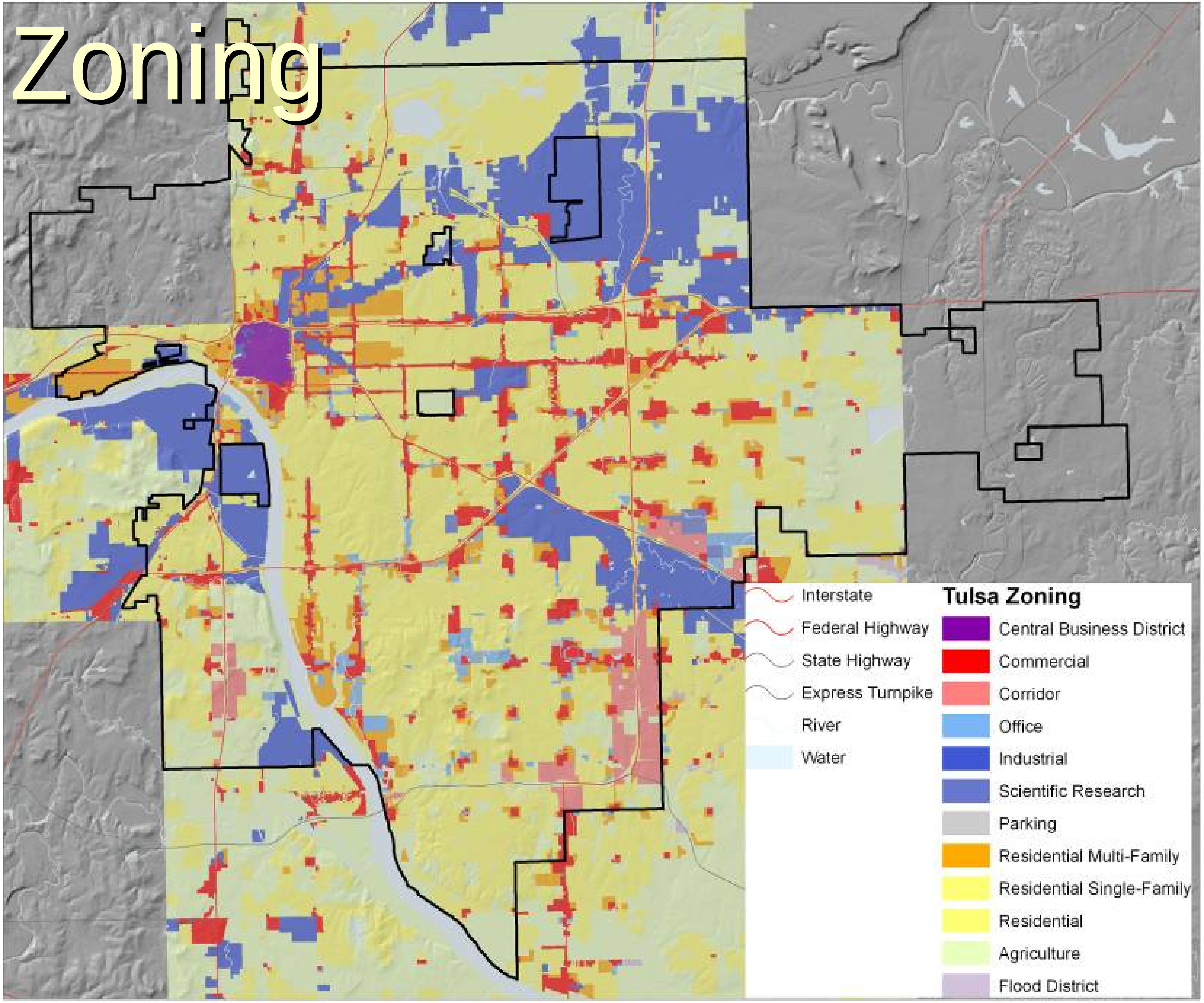
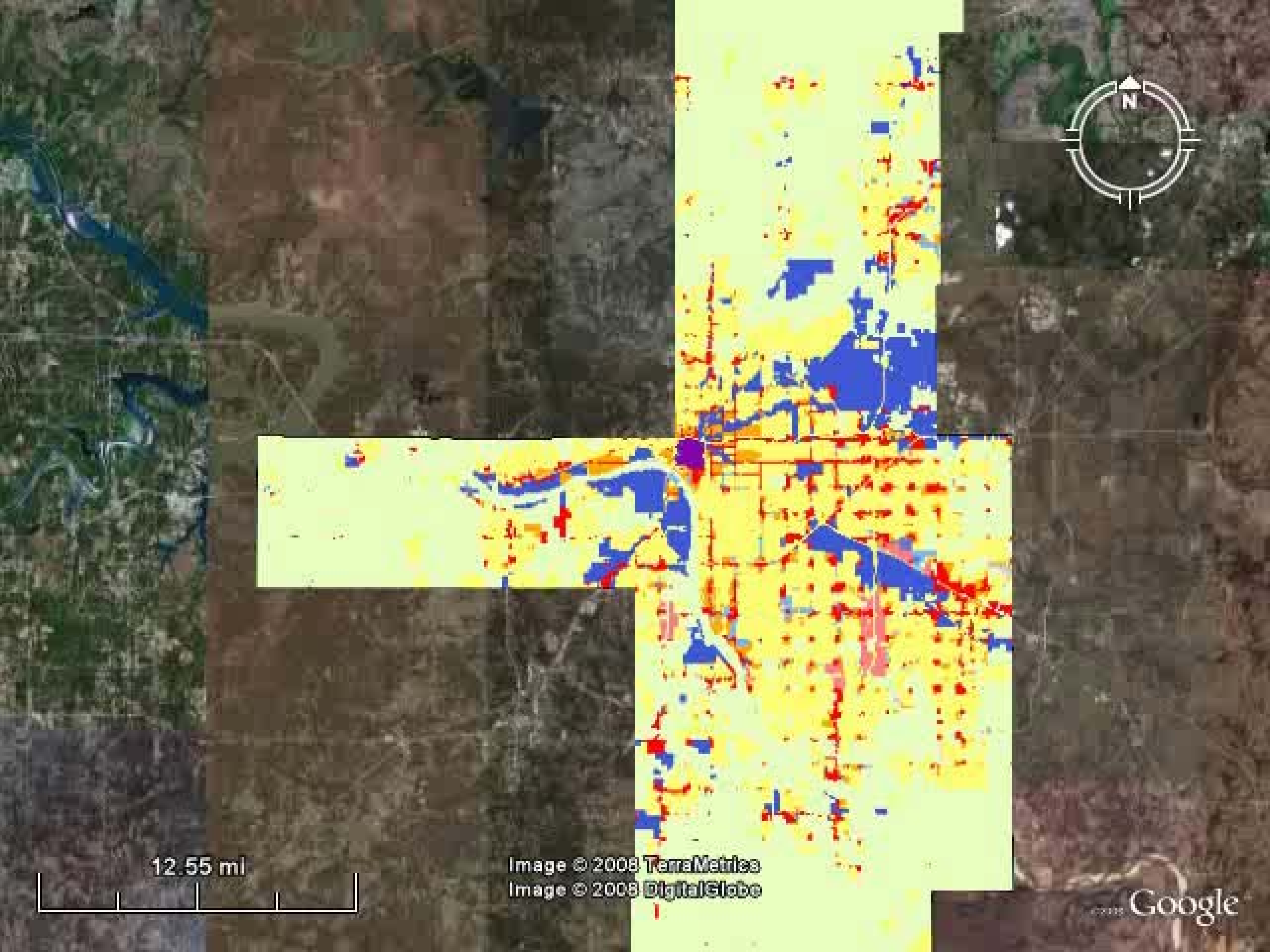
Zoning


Interstate
Federal Highway
State Highway
Express Turnpike
River
Water
Tulsa Zoning
Central Business District
Commercial
Corridor
Office
Industrial
Scientific Research
Parking
Residential Multi-Family
Residential Single-Family
Residential
Agriculture
Flood District



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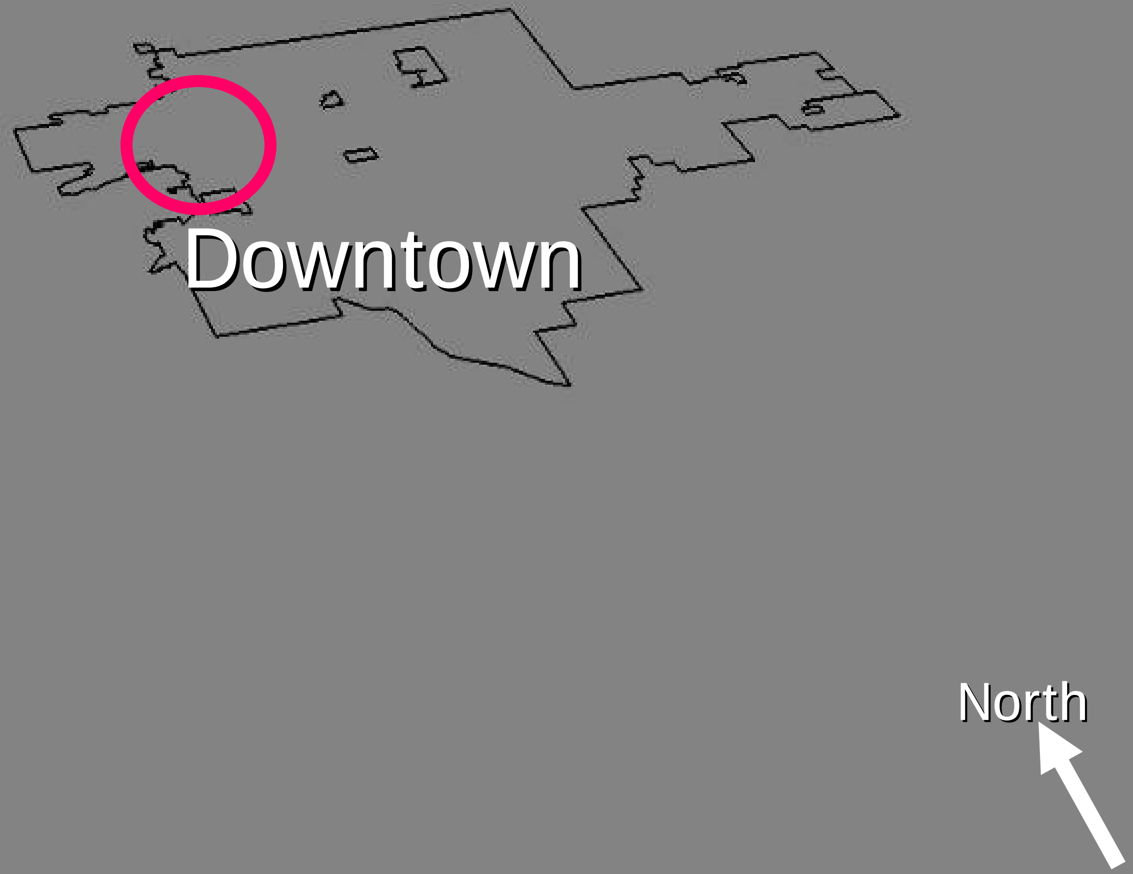
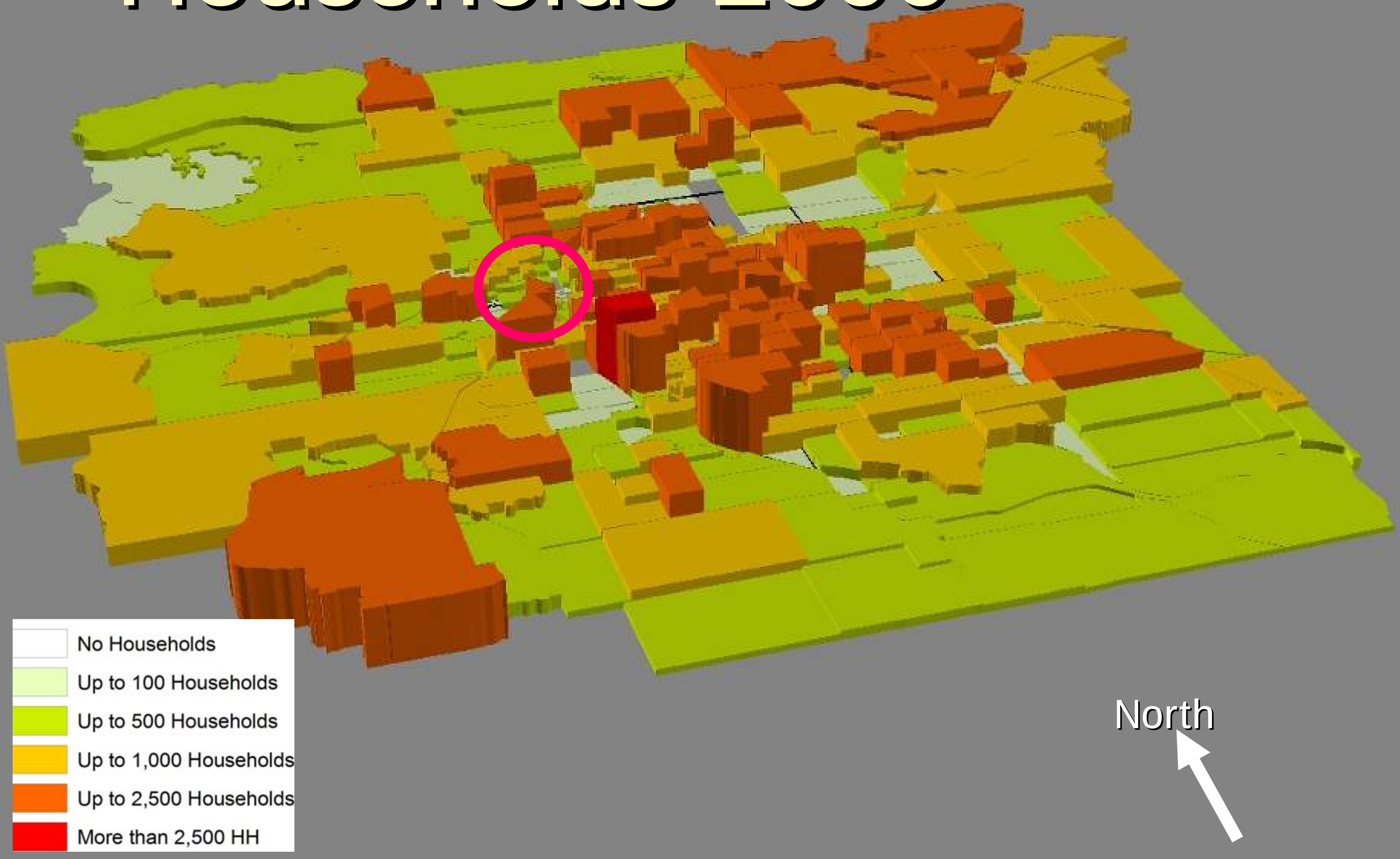
12.55 mi
Image © 2008 TerraMetrics
Image © 2008 DigitalGlobe
Google

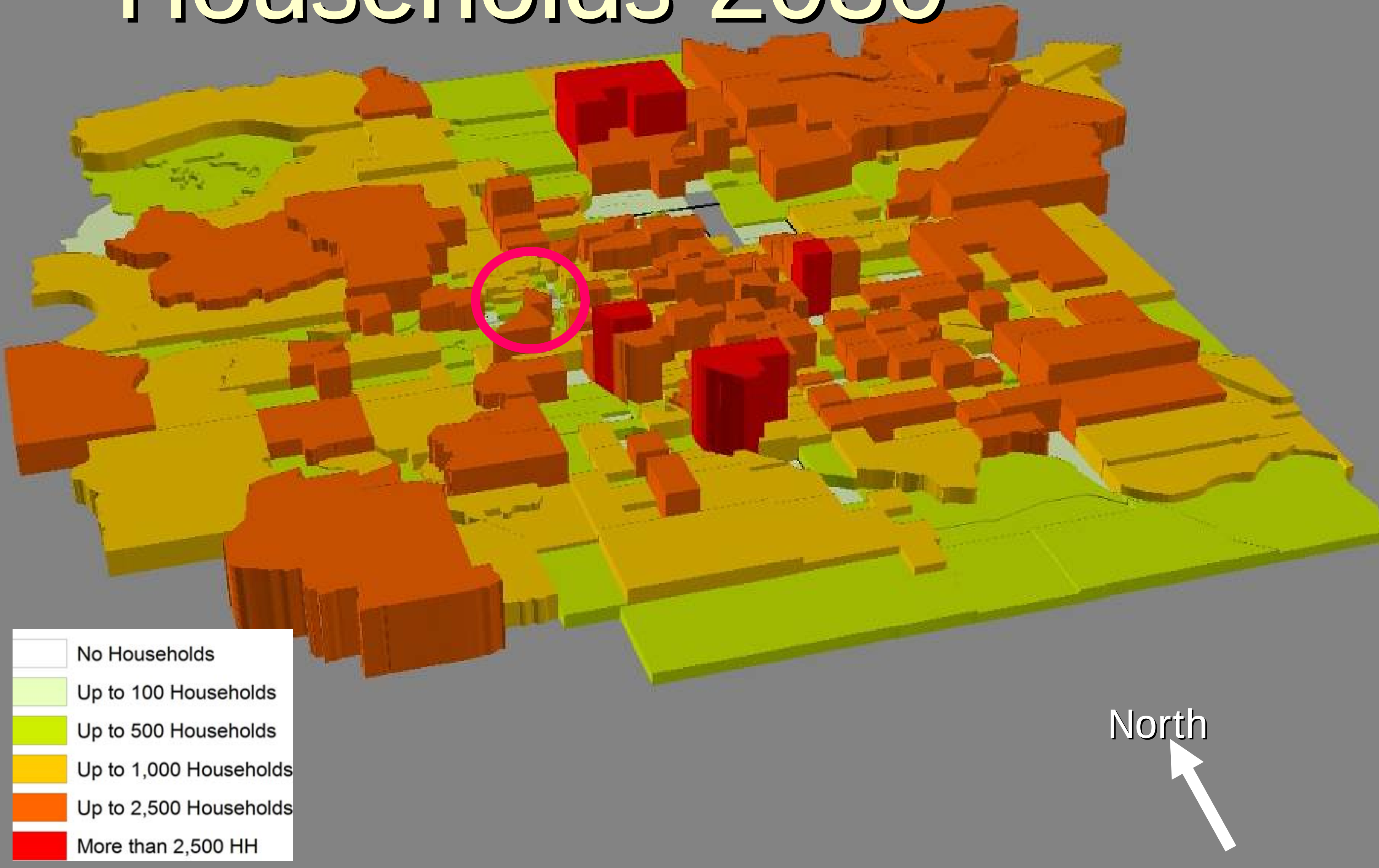
3D - TAZs



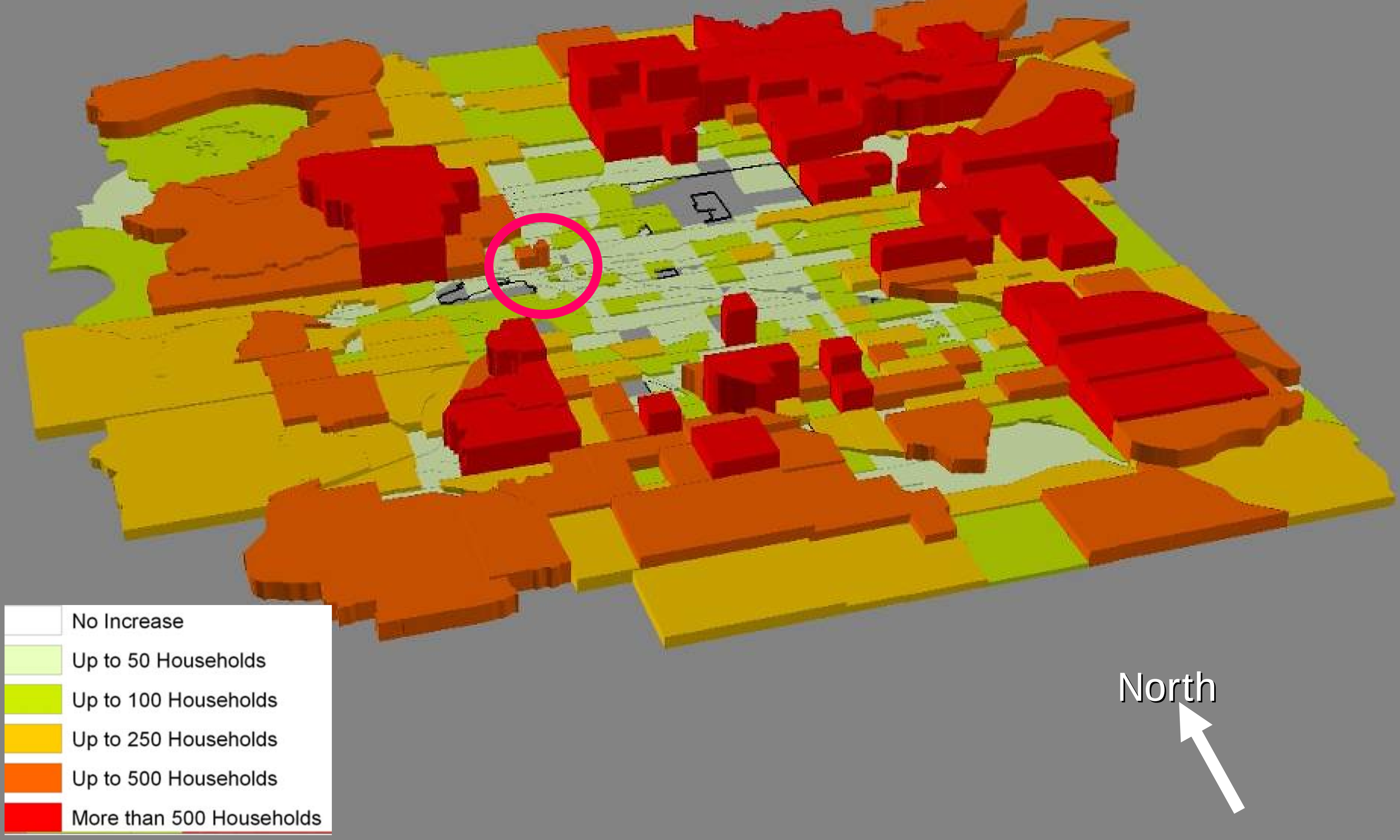
Households 2000



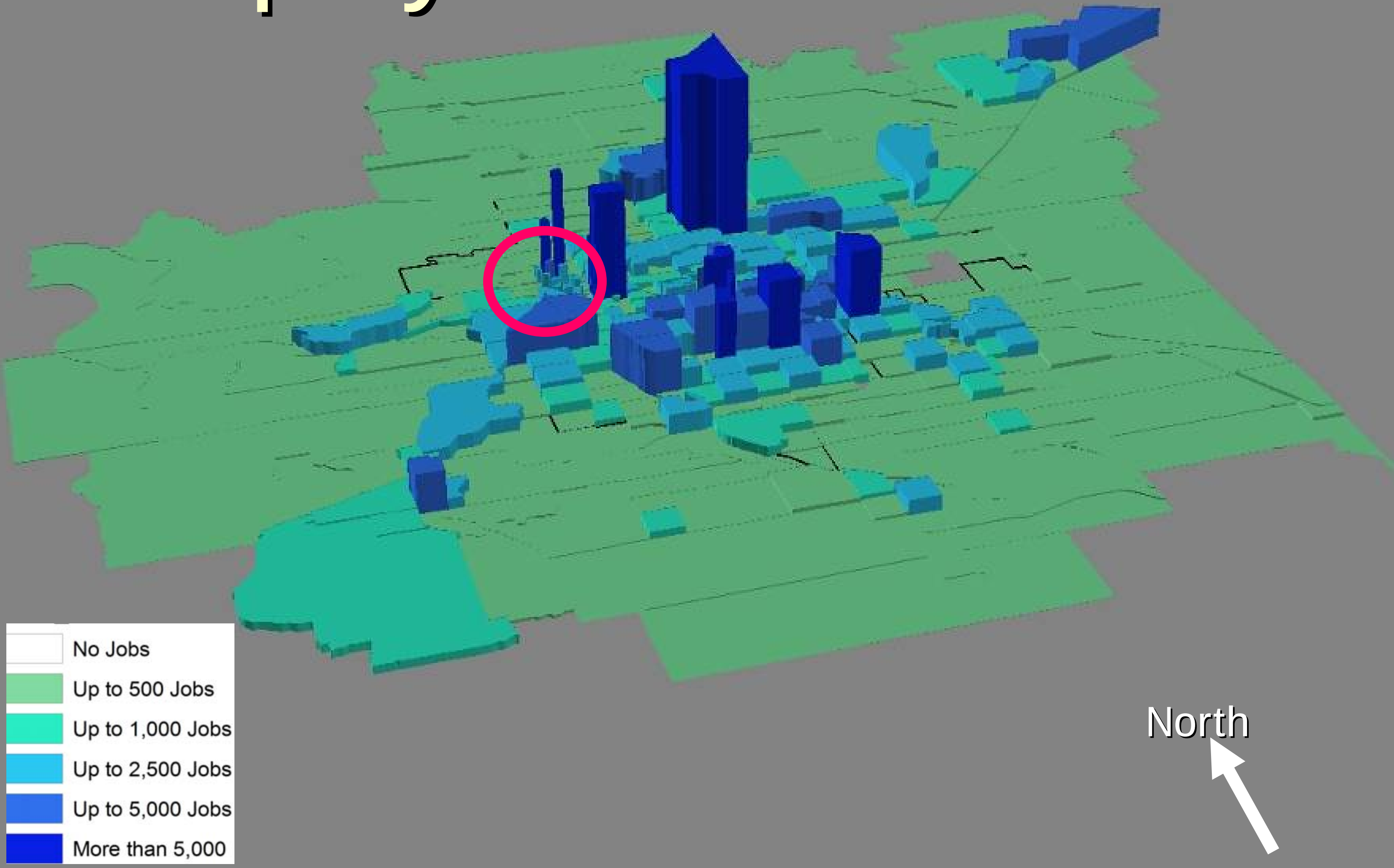
Households 2030



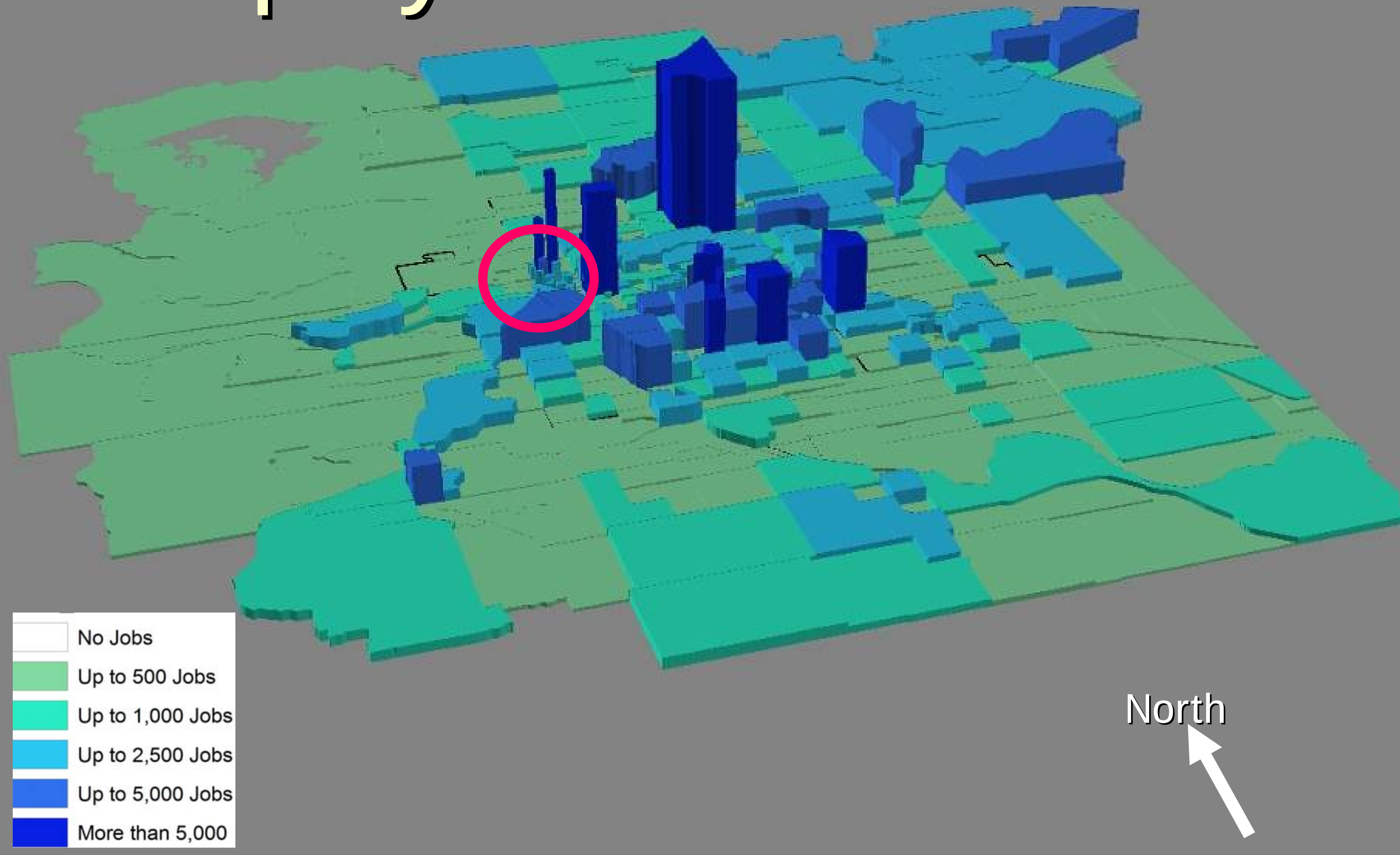
Tulsa Household Growth



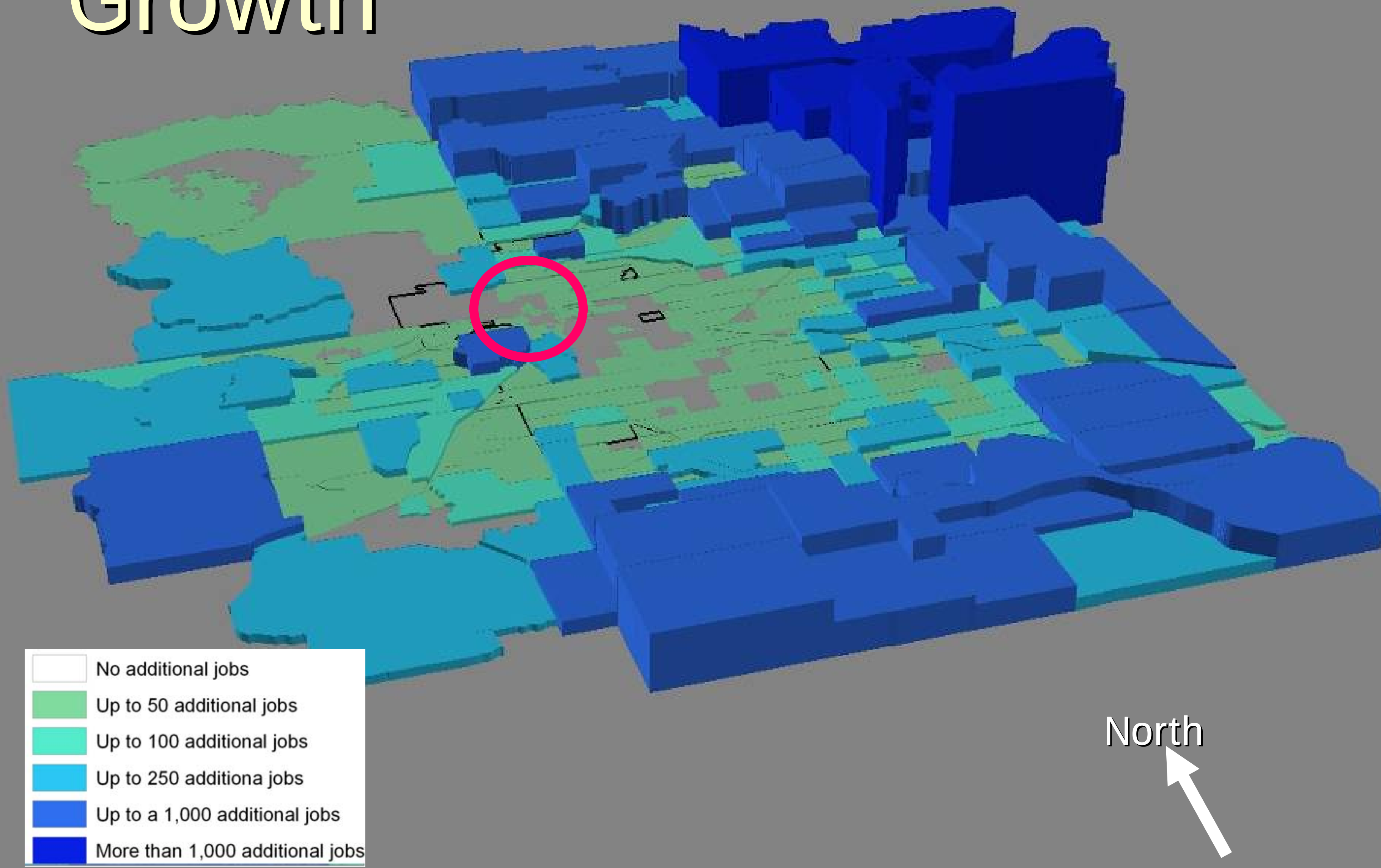
Employment 2000



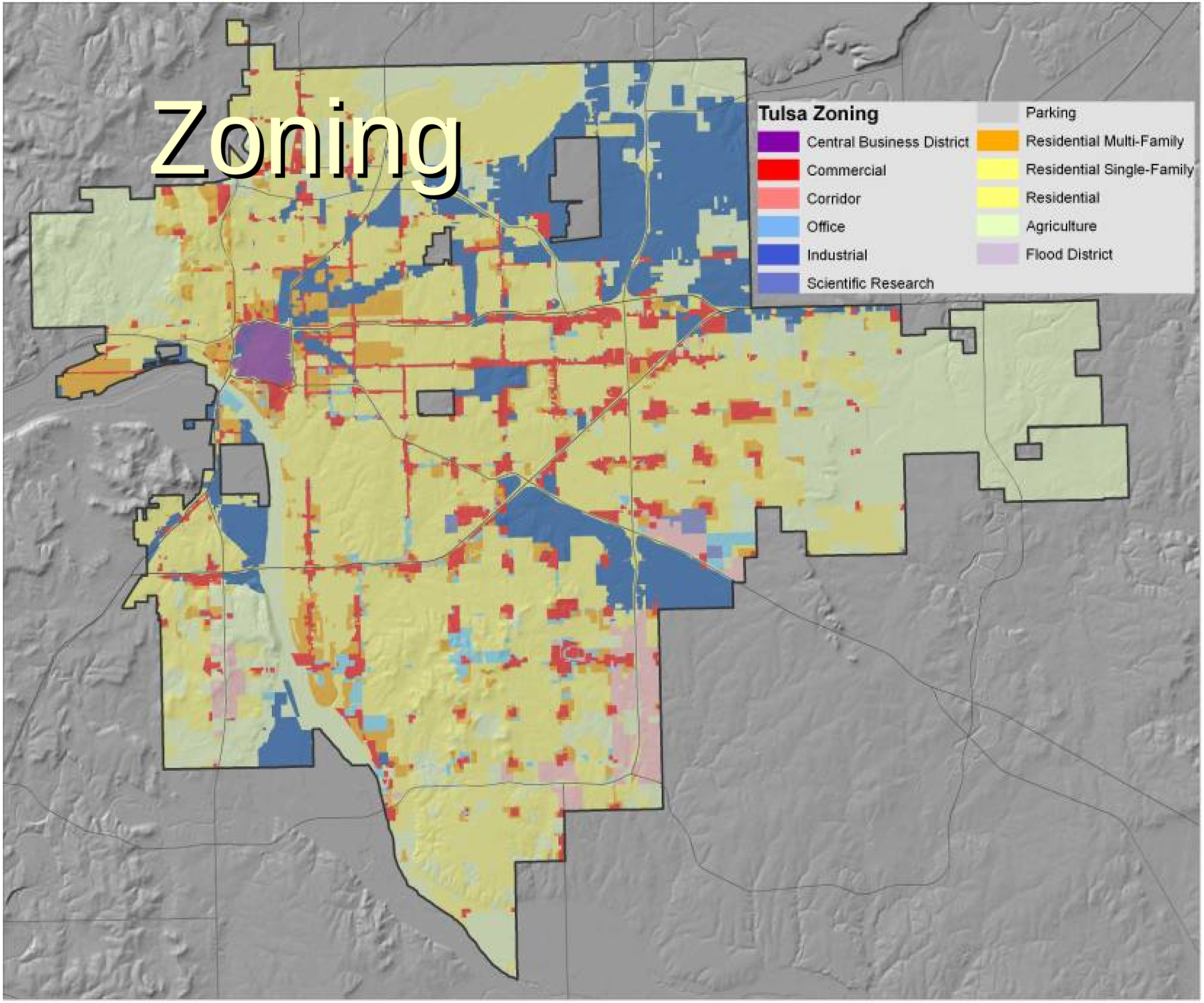
Employment 2030



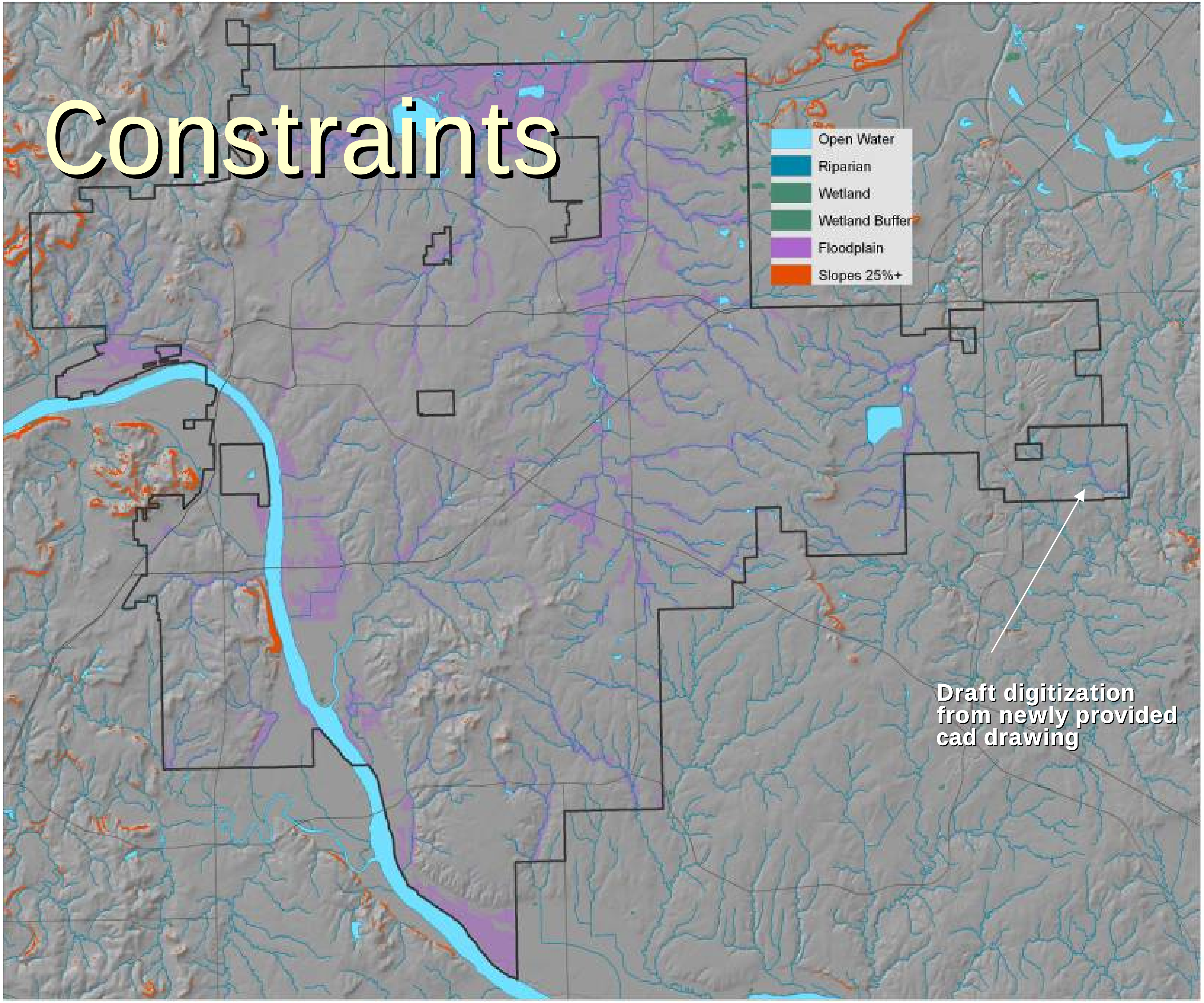
Forecast Employment Growth



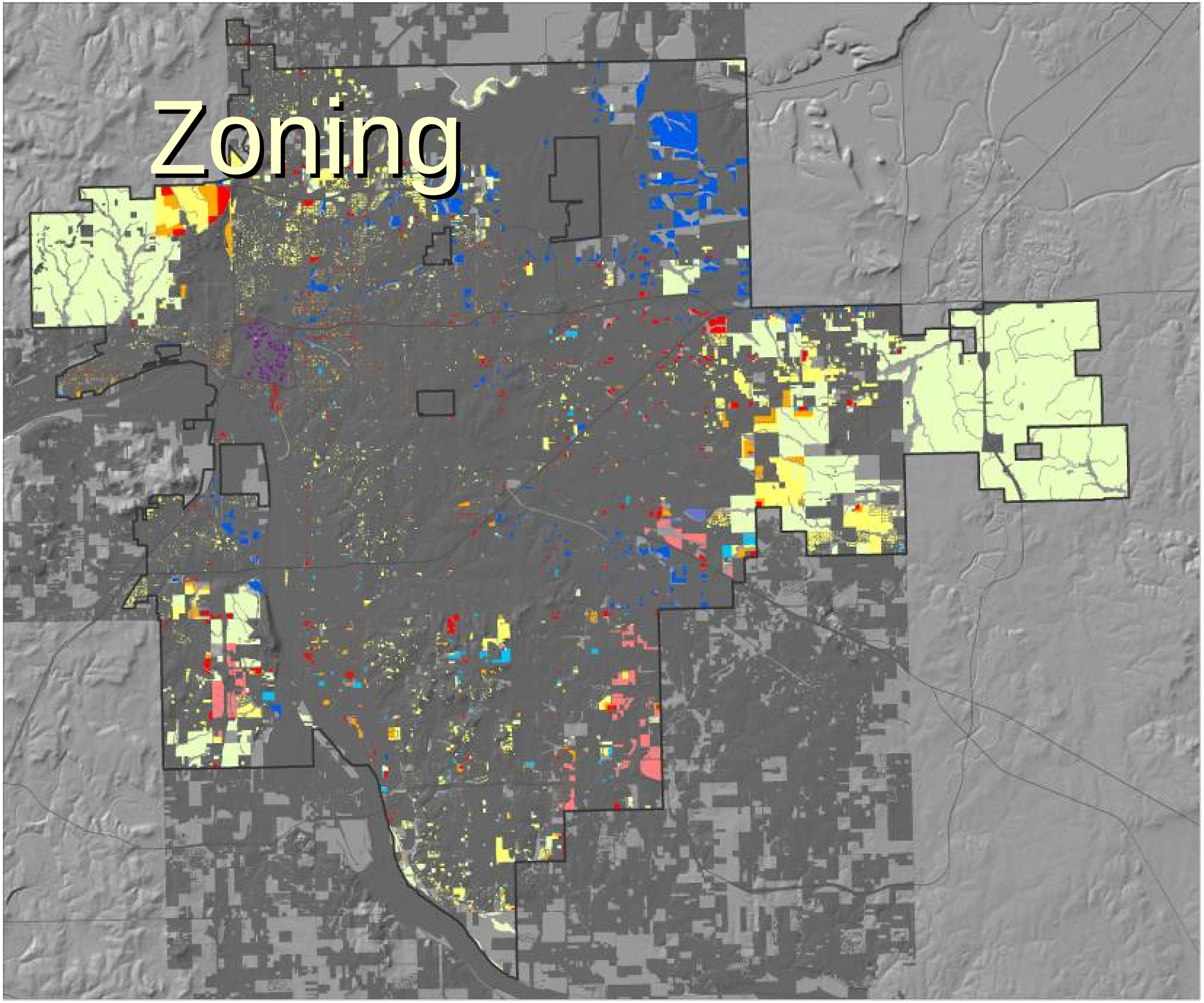
Zoning


Tulsa Zoning
Central Business District
Commercial
Corridor
Office
Industrial
Scientific Research
Parking
Residential Multi-Family
Residential Single-Family
Residential
Agriculture
Flood District

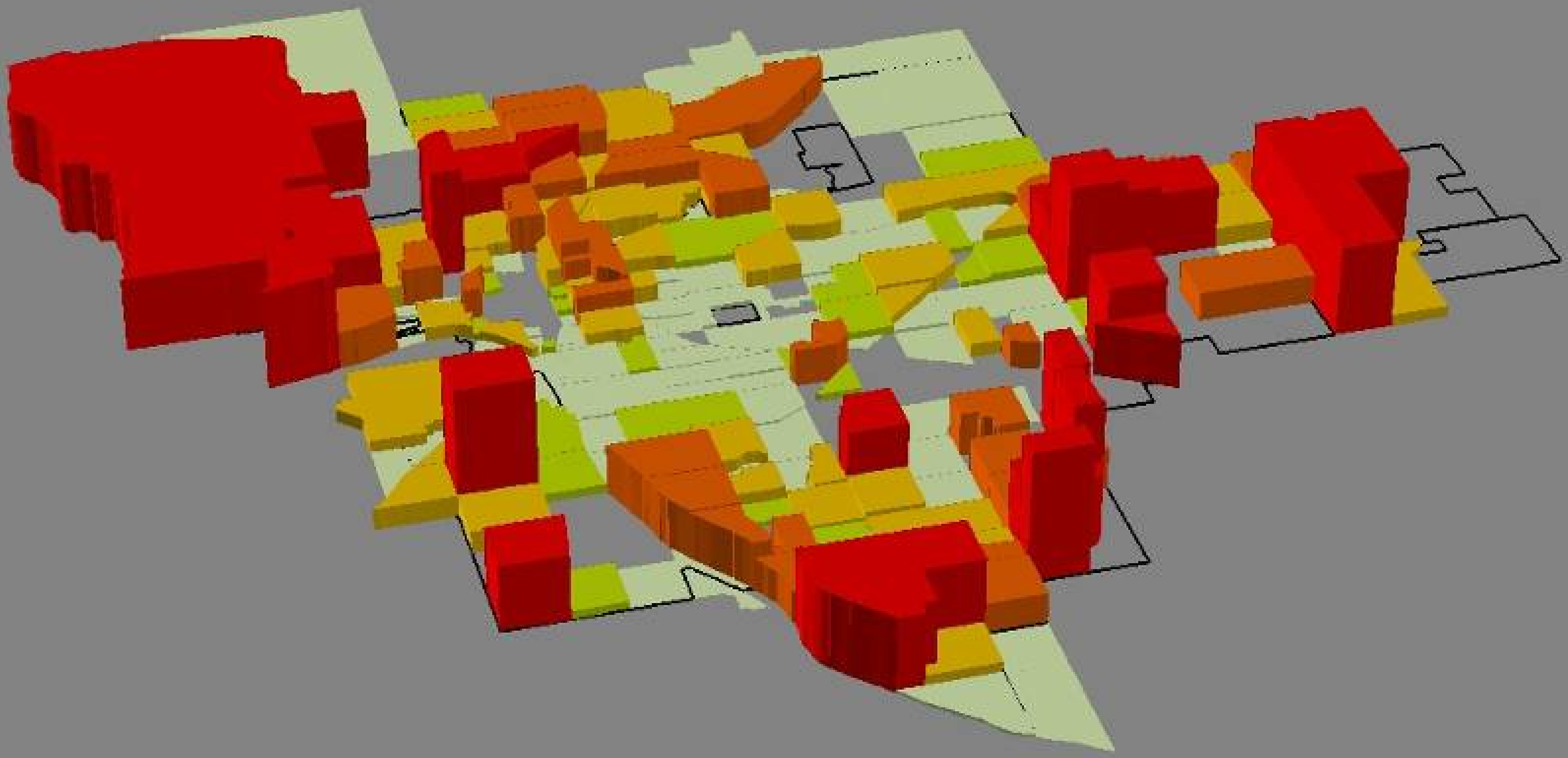
Constraints



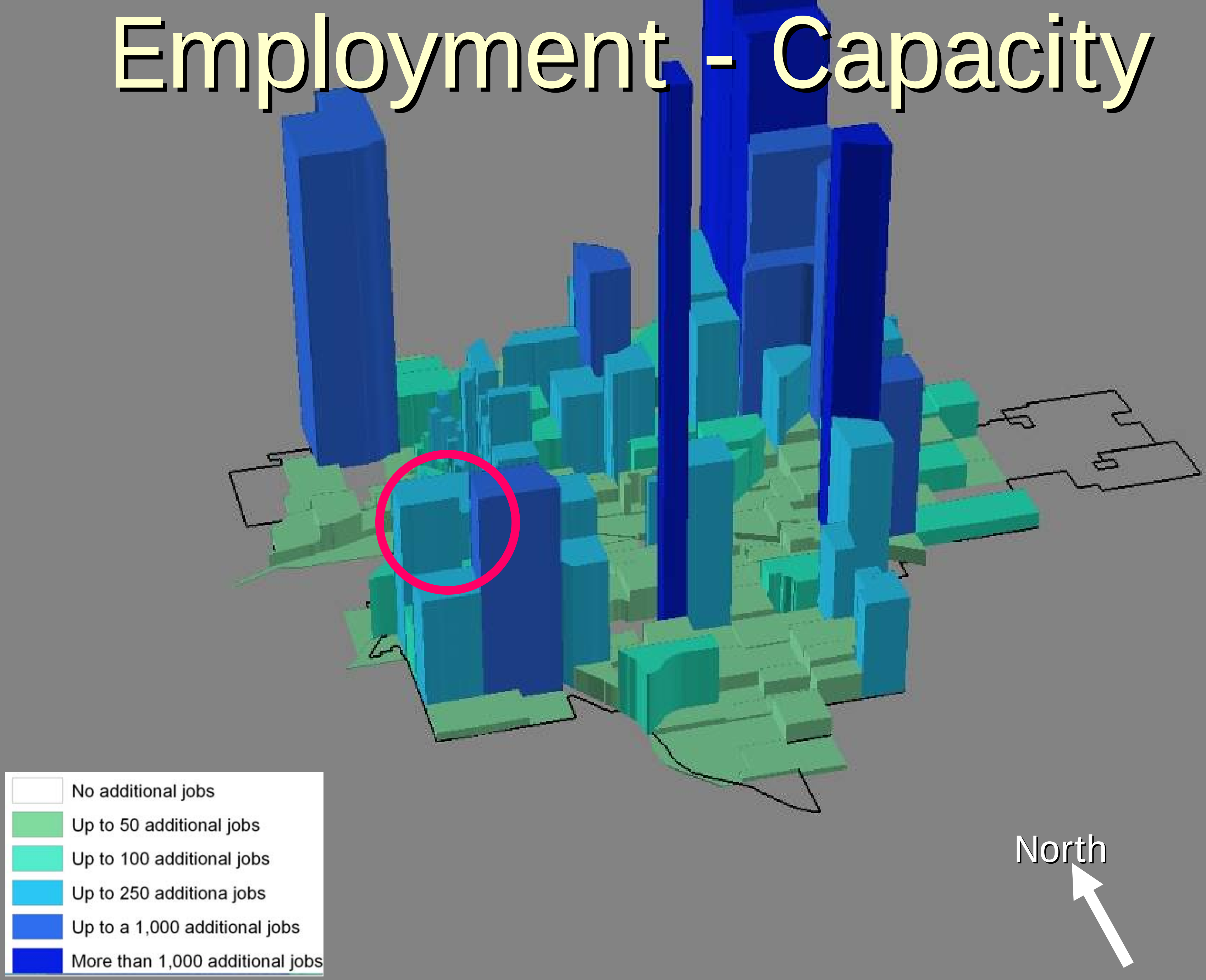
Zoning



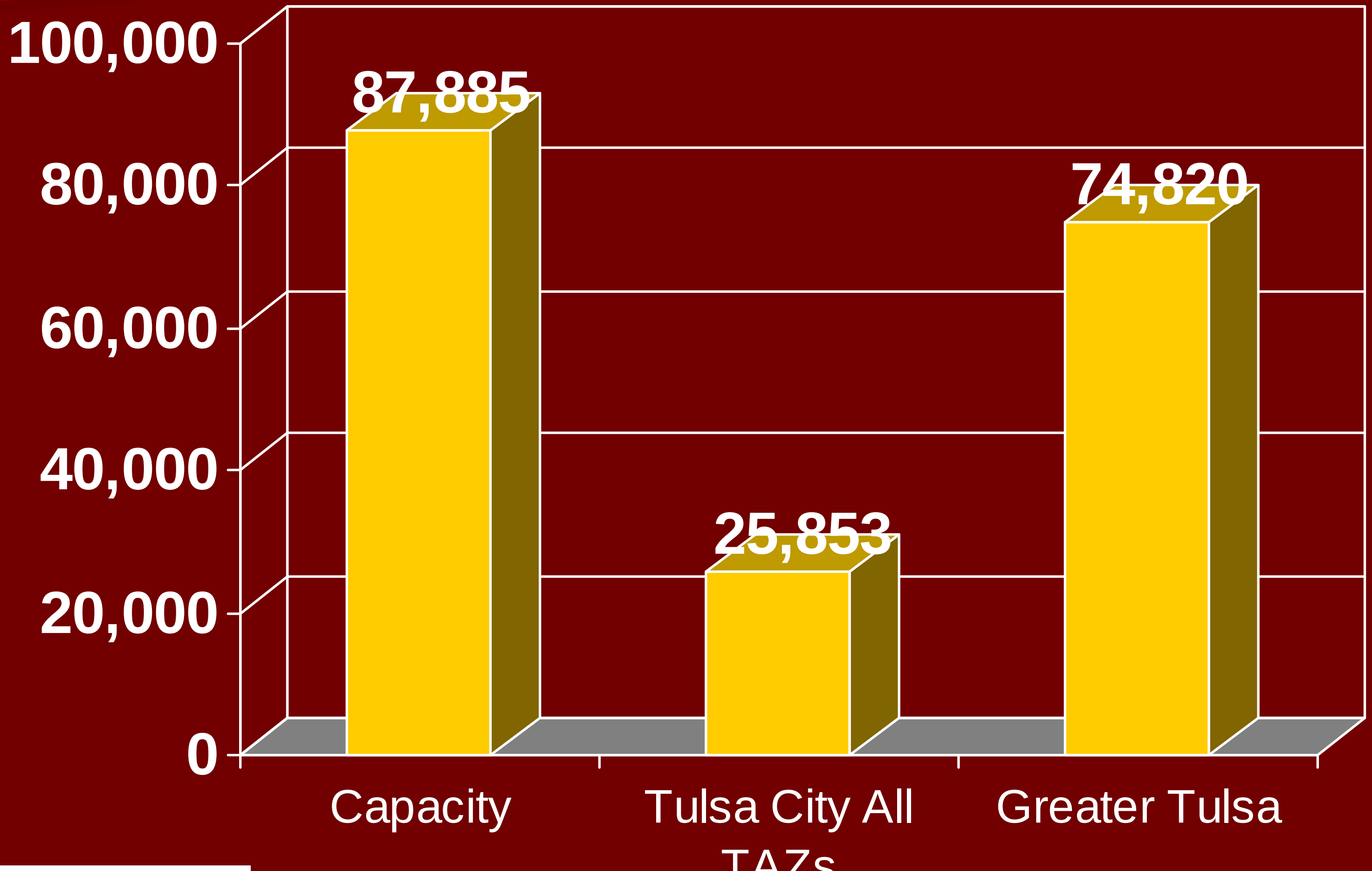
Zoning Capacity



Employment - Capacity



Housing Forecast - Units



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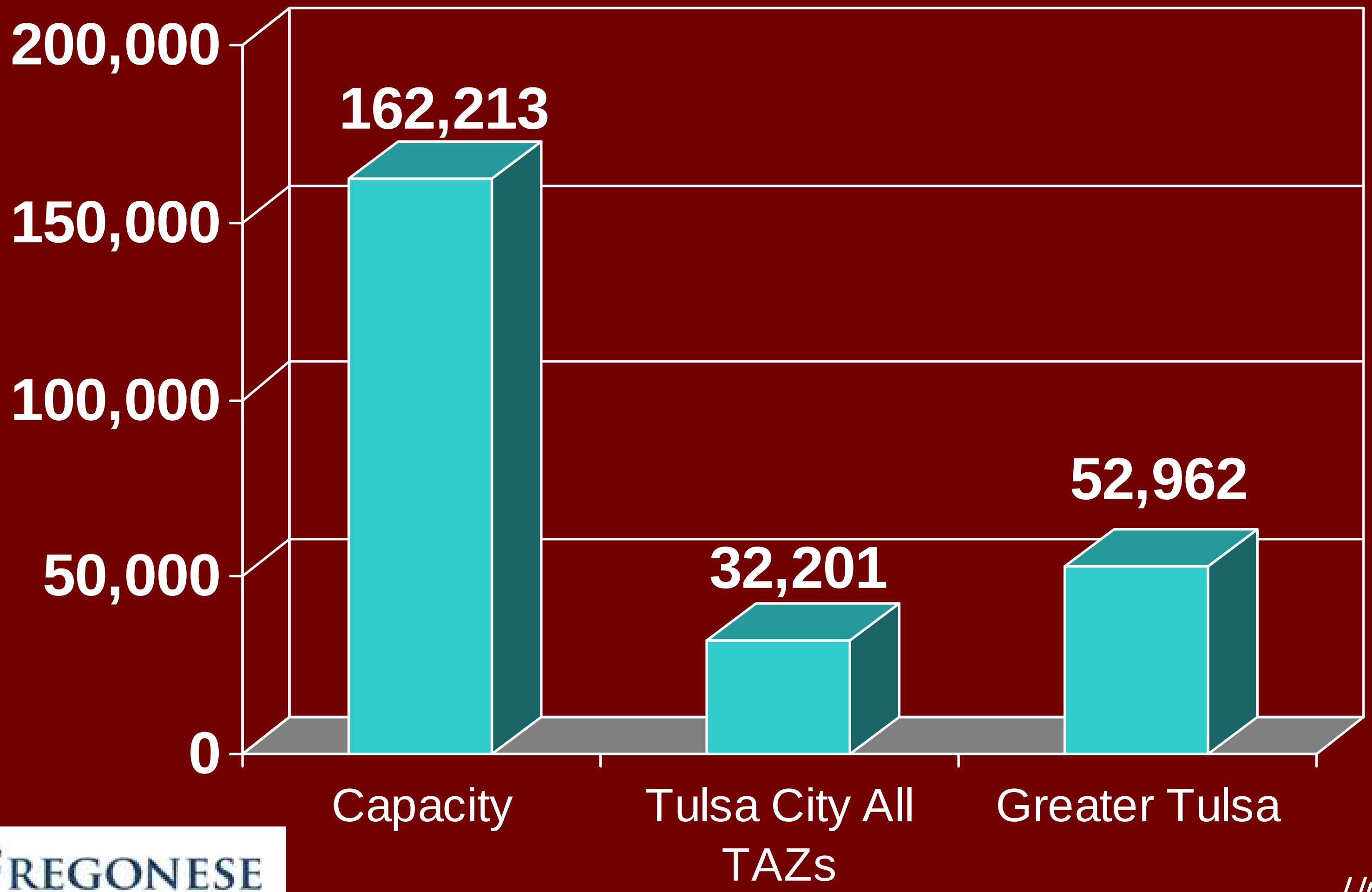
Updated 7/29/08

Jobs



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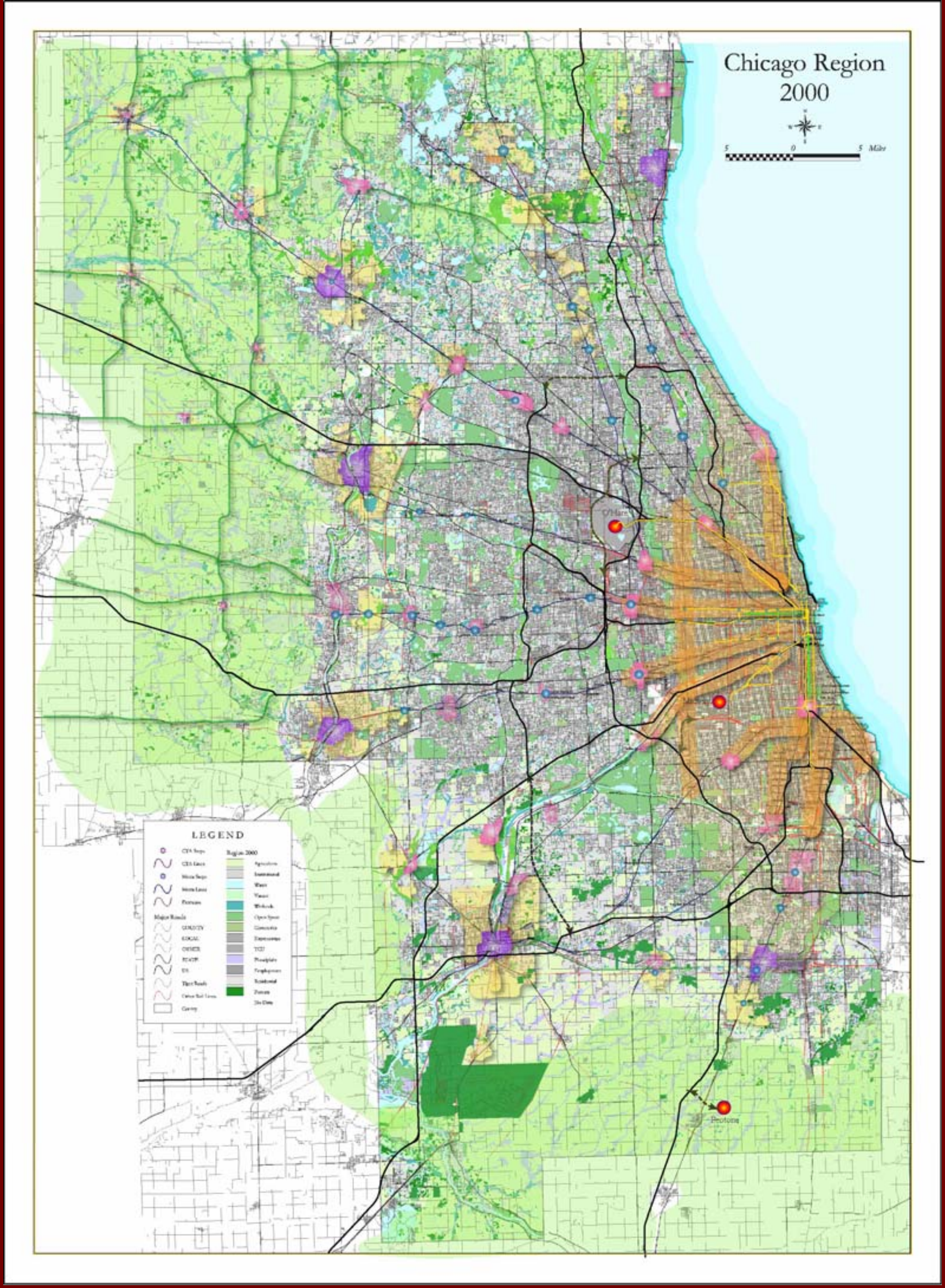
Updated 7/29/08

Chicago Metropolis



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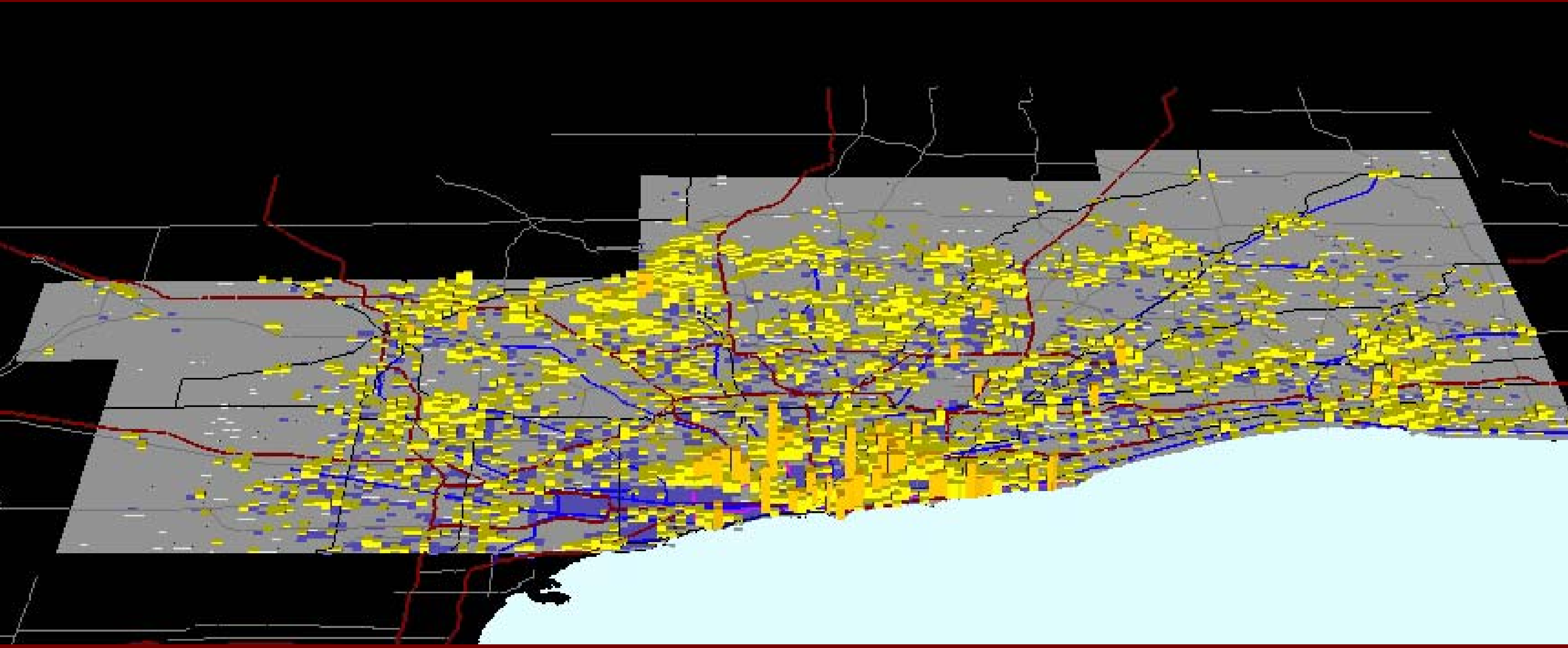
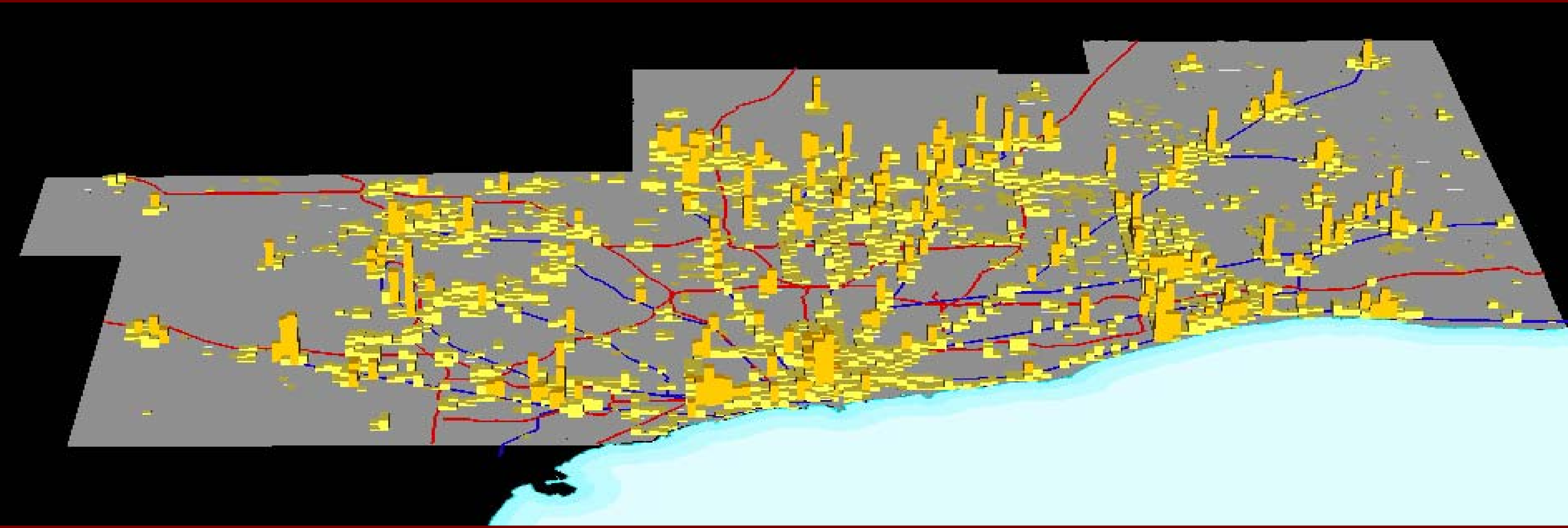
Chicago Metro Population Change 1990-2000



Forecast Population Change 2000-2030



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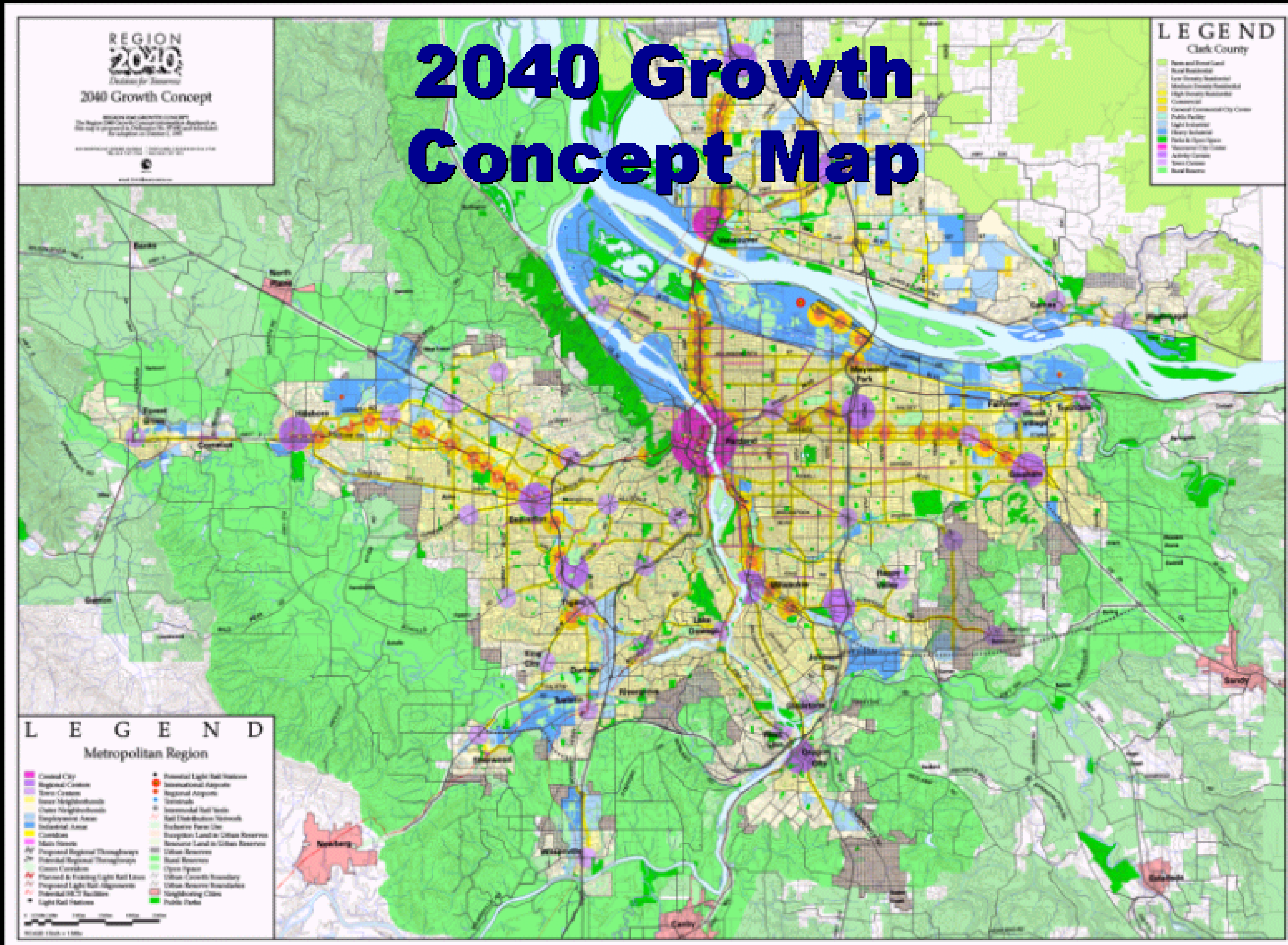
2040 Growth Concept Map



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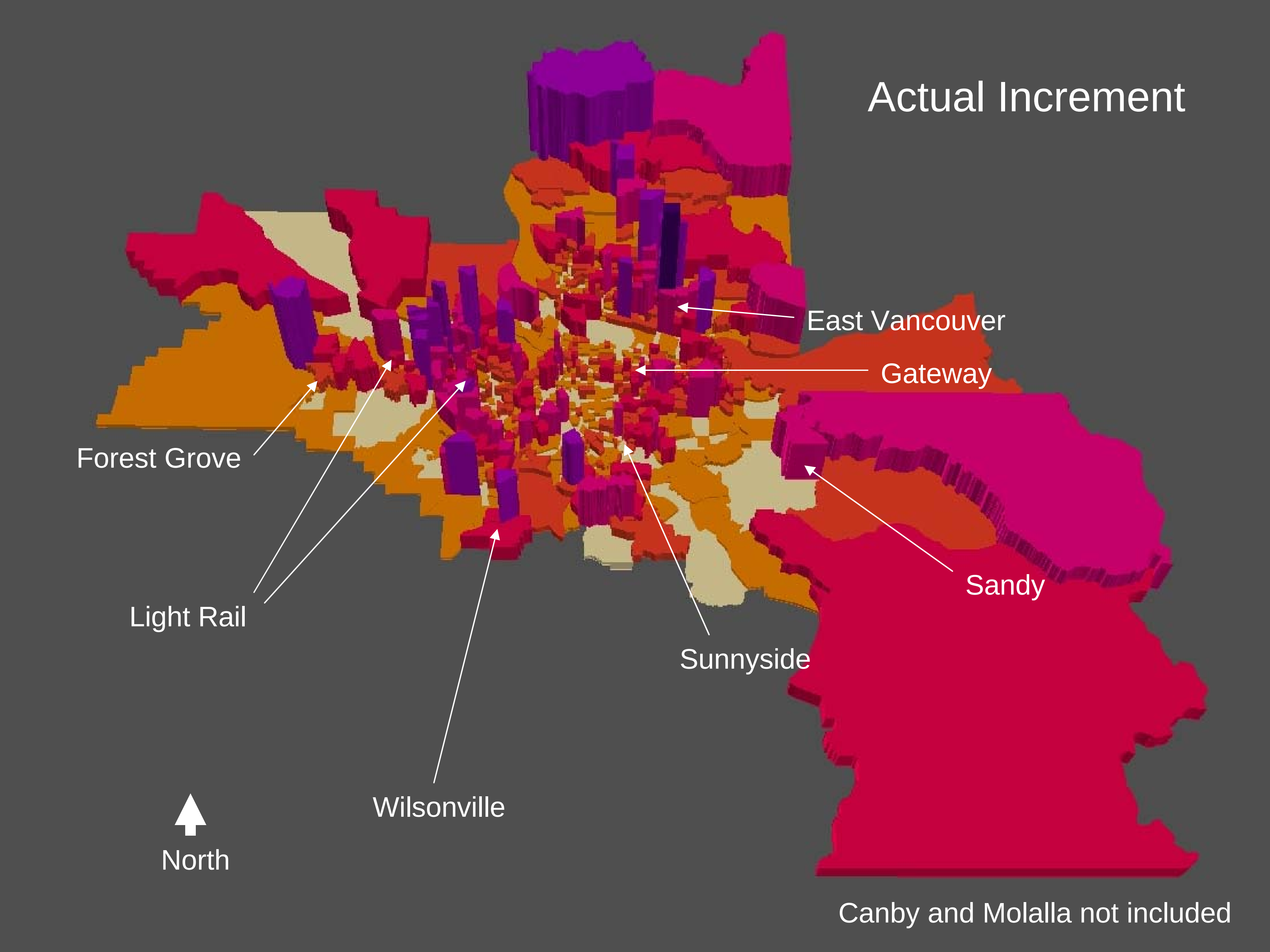
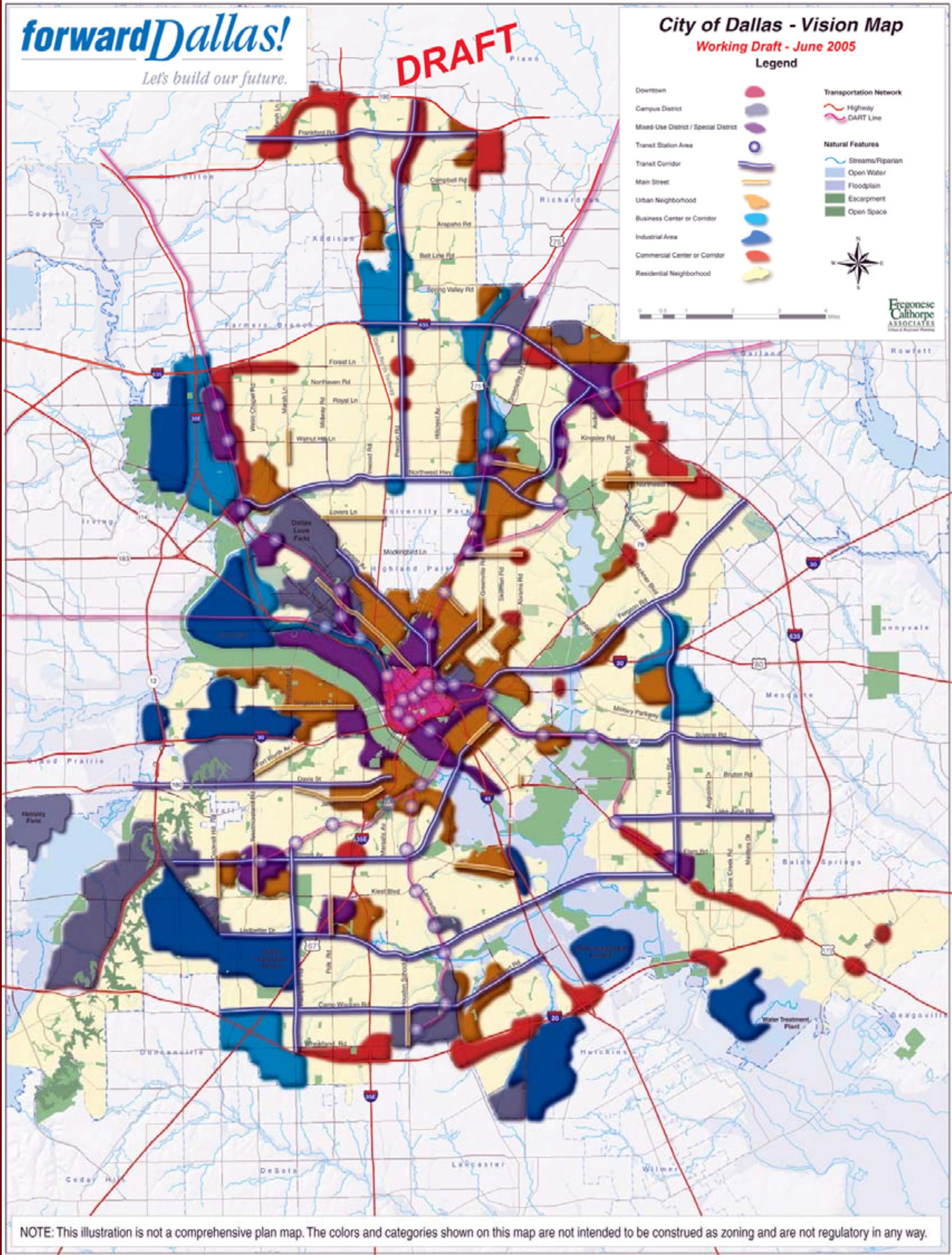

Actual Increment
East Vancouver
Gateway
Forest Grove
Light Rail
Sandy
Sunnyside
Wilsonville
North
Canby and Molalla not included

Dallas



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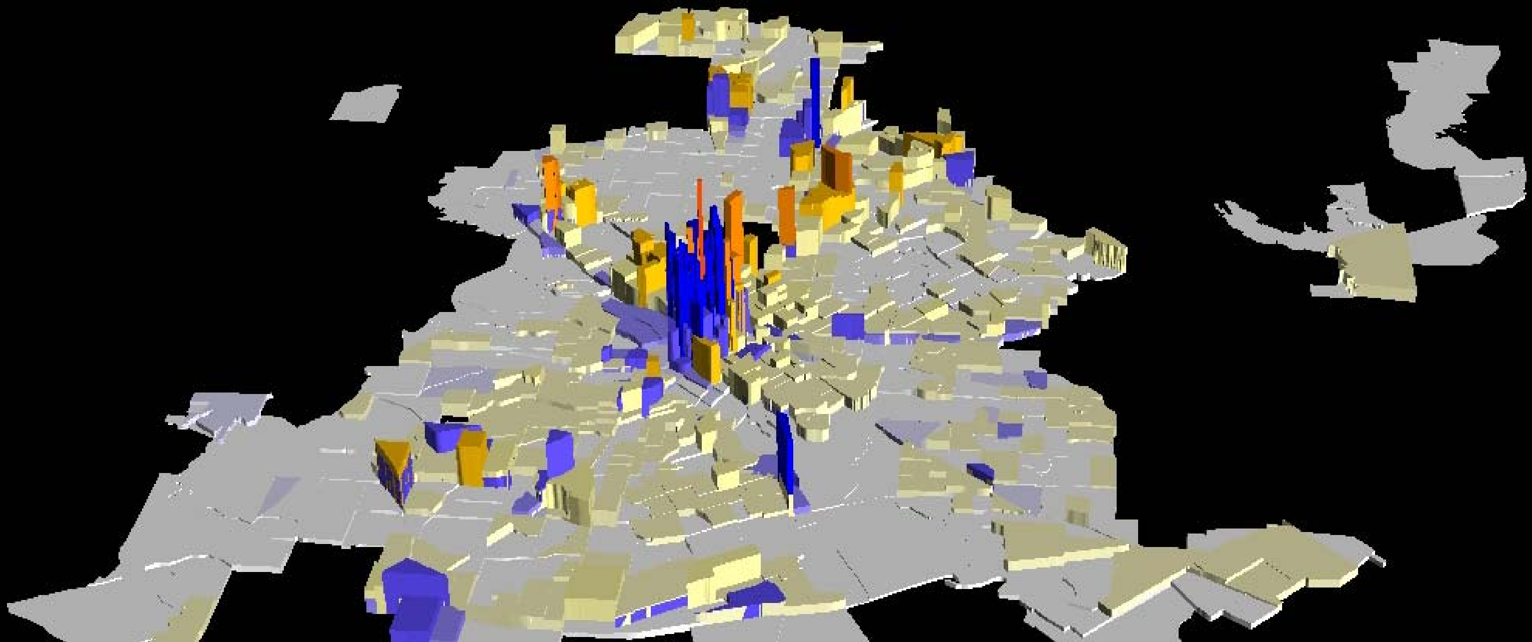
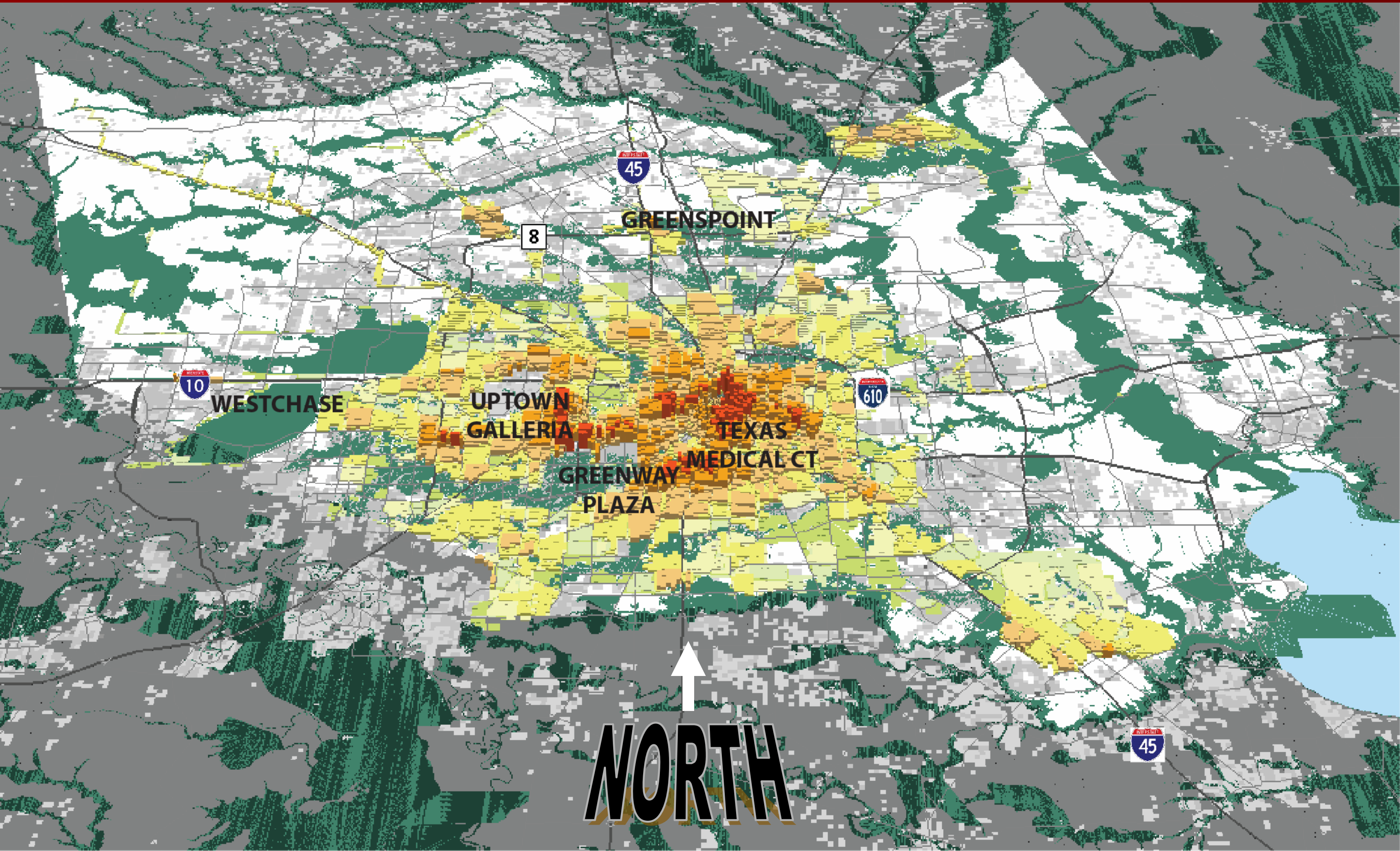
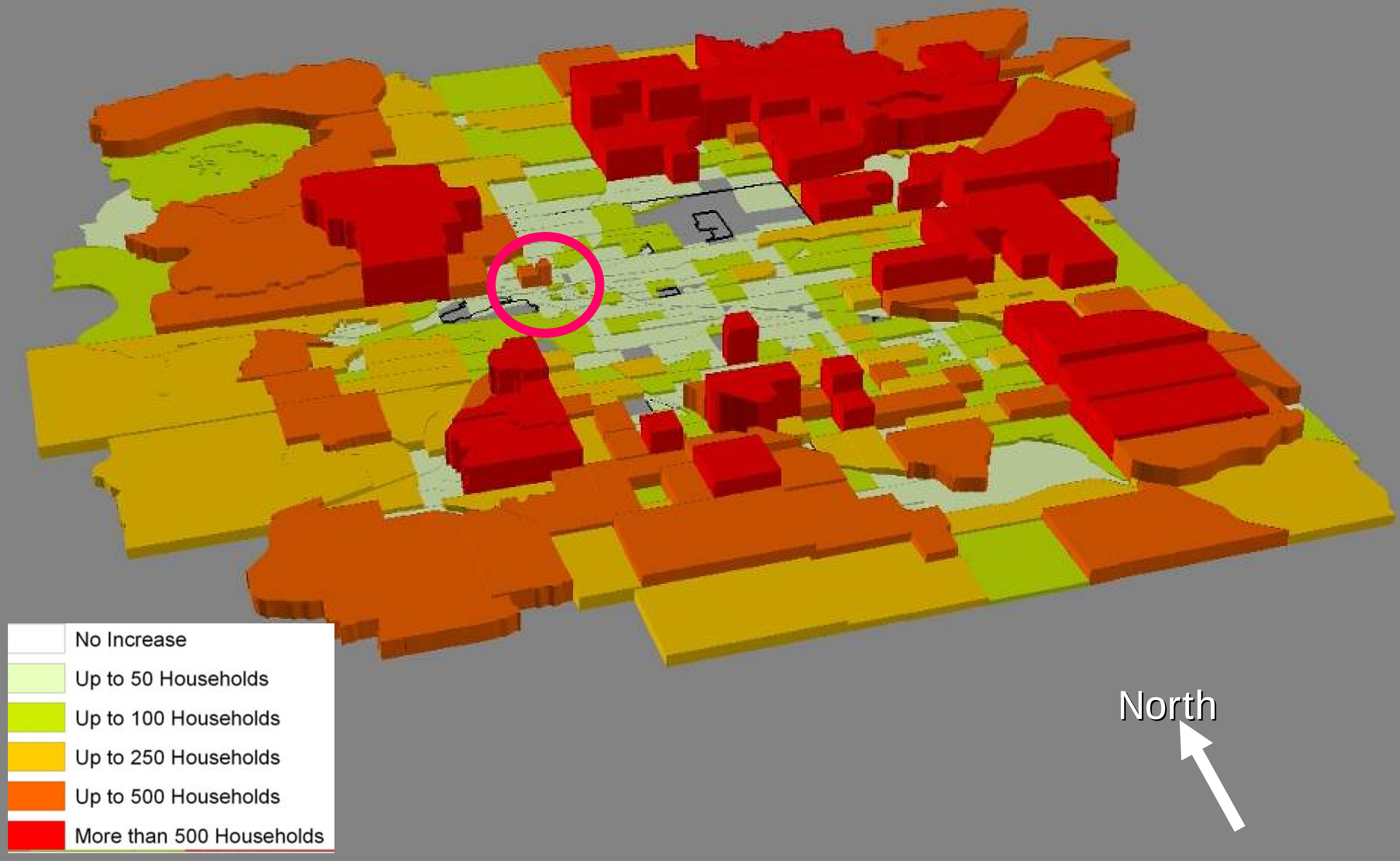
Dallas Forecast 2000-2030



Houston Region



Tulsa Household Growth



Economic Competitiveness Strategy

for the City of Tulsa

June 16, 2008

Jon Roberts

T·I·P STRATEGIES

TIP | agenda

- Background
- Update
- Economic framework
- Themes

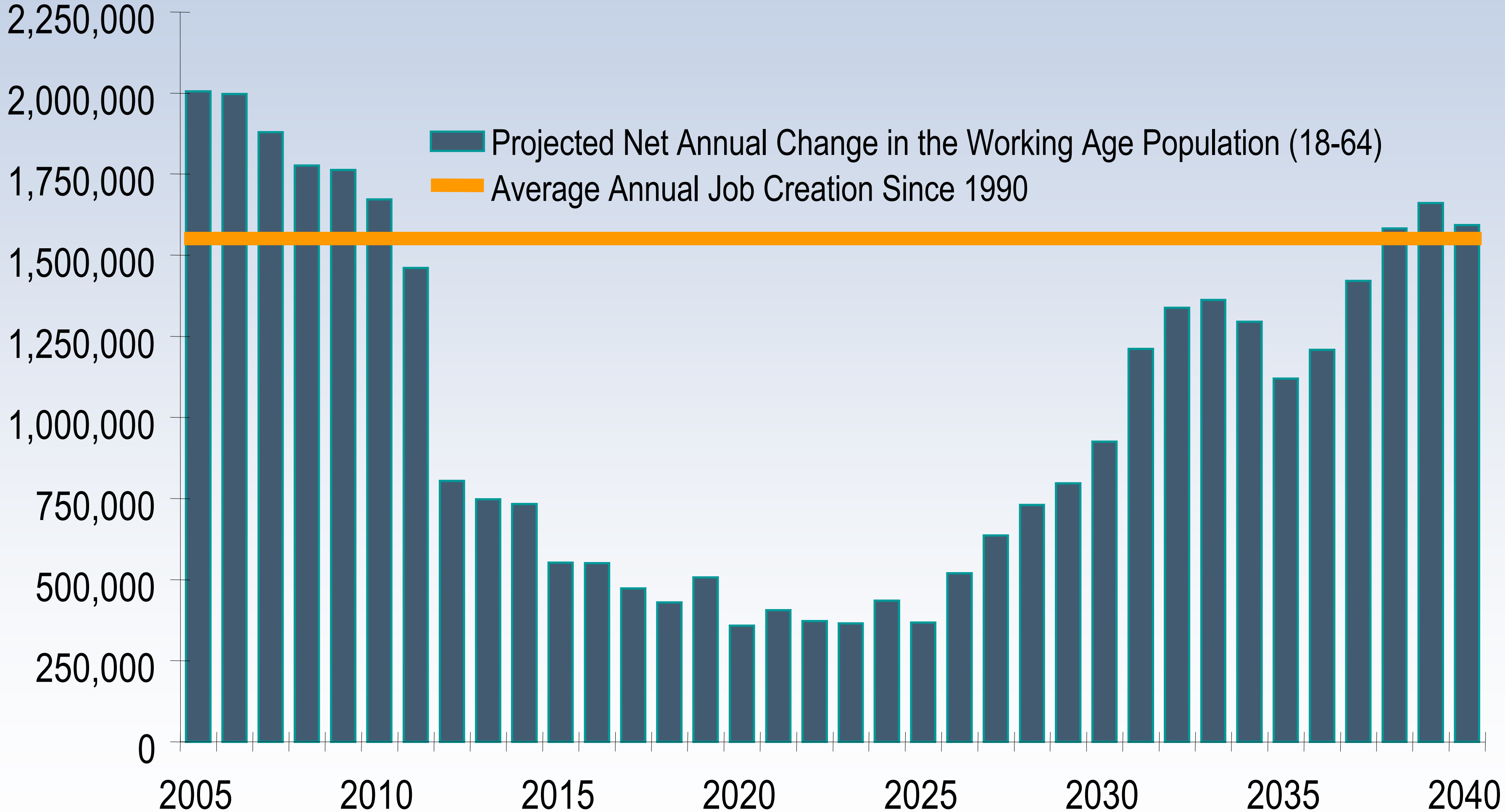
TIP background

T·I·P STRATEGIES

TULSA | evolution of ED goals

T·I·P STRATEGIES

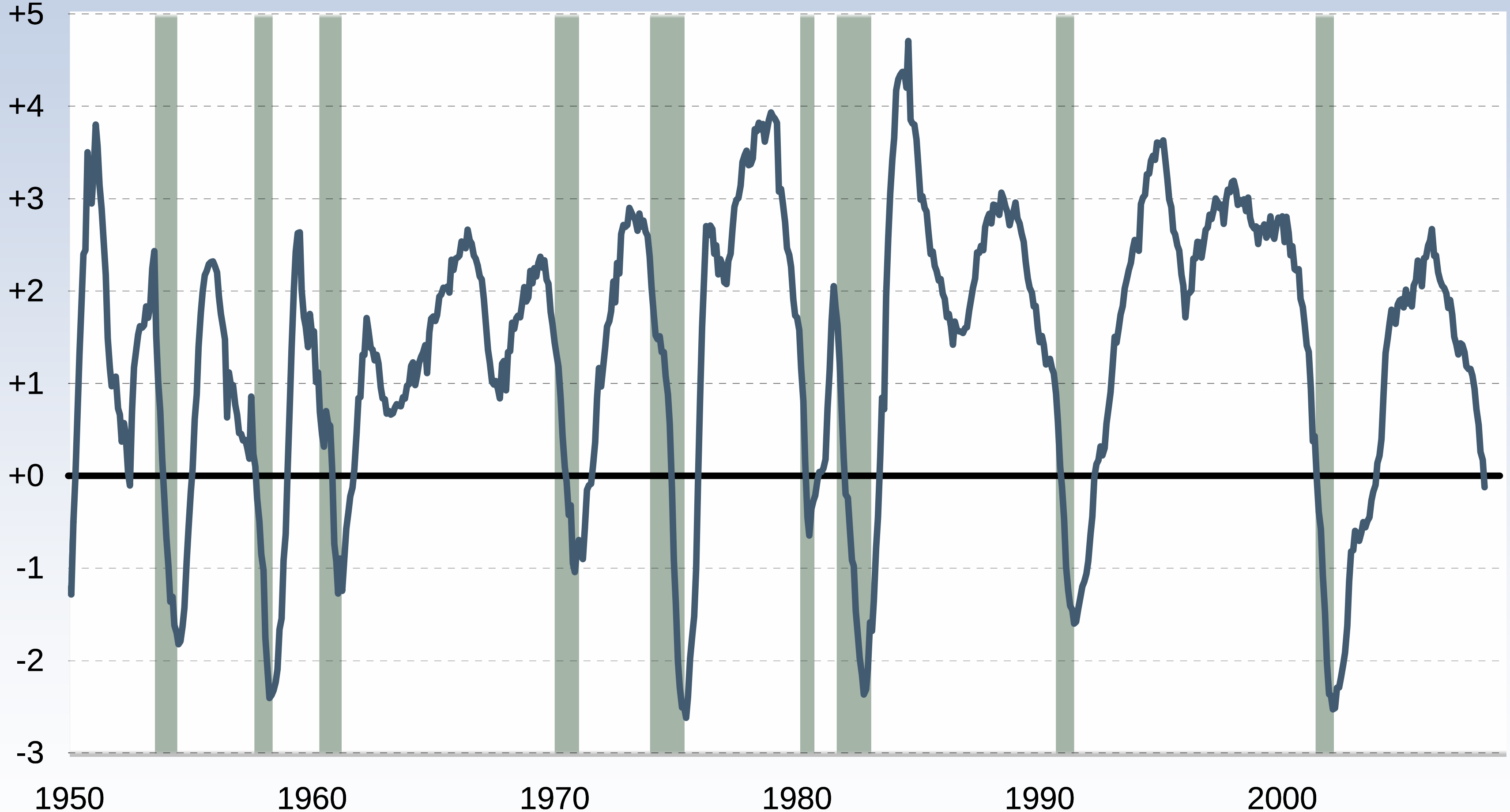
us | a labor crisis approaches



T·I·P STRATEGIES

SOURCES: *TIP Strategies; U.S. Census Bureau; U.S. Bureau of Economic Analysis*

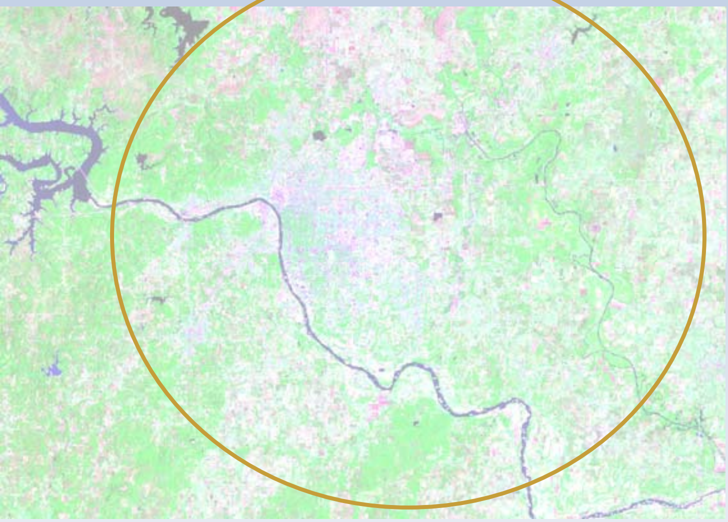
us | private sector employment



NOTE: *Year-over-year change on data that are not seasonally adusted*

SOURCE: *U.S. Bureau of Labor Statistics (accessed via Moody's Analytics); National Bureau of Economic Research*

T·I·P STRATEGIES



TIP
project update

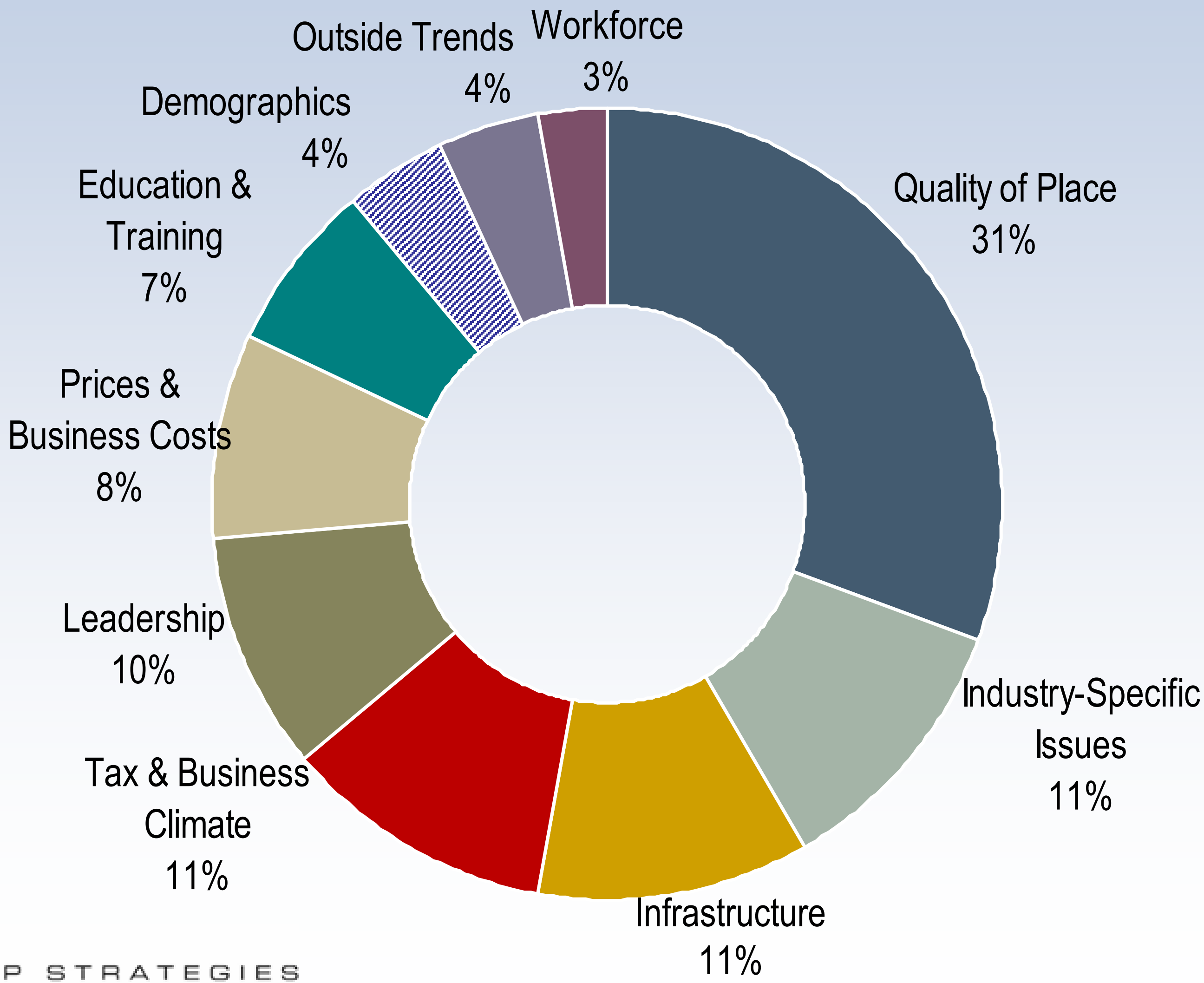
T·I·P STRATEGIES

UPDATE | existing reports

The team has reviewed numerous reports from a variety of sources. From these TIP has:

- noted dozens of issues raised by past observers of challenges, strengths, weaknesses, opportunities.
- catalogued relevant recommendations, strategies, goals, and objectives that organizations within the region have been advised to pursue.

UPDATE | existing reports



UPDATE | highlights

workforce
- demographics
- education
- skills

business climate
- tax policy
- land-use planning
- quality of place

competitiveness
- region vs. others
- city's role in the region

major employers
- energy
- healthcare
- finance
- aerospace
- call centers/back office

T·I·P STRATEGIES

HIGHLIGHTS | major employers

energy
healthcare
finance
aerospace
back office

- BANK OF OKLAHOMA N.A. — You're Better Off At BOk!
- Williams
- Hillcrest
- NORDAM
- EDS — EXPERTISE. ANSWERS. RESULTS.
- St. John Health System
- avis budget group
- American Airlines — AA.com
- DOLLAR RENT A CAR
- Thrifty
- IBM
- SPIRIT AEROSYSTEMS

HIGHLIGHTS | major employers

> 1000

- AAON -HEAT EXCHANGERS
- ALORICA INC - CUSTOMER TECH
- AMERICAN AIRLINES- MAINTEN.
- AT&T – COMM SERVICES
- AVIS BUDGET GROUP - RES CTR
- BANK OF OKLAHOMA - FINANCIAL SERVICES
- BLUE CROSS & BLUE SHIELD – INSURANCE
- DIRECTV - CUSTOMER SERVICE
- DOLLAR THRIFTY AUTOMOTIVE - AUTO RENTAL
- ECHOSTAR - CUSTOMER SERVICE
- EDS - DATA SERVICES
- HILLCREST HEALTHCARE SYSTEM - HEALTH CARE
- HSBC FINANCE CORP - CREDIT CARD SERVICES
- IBM – ACCOUNTING
- IC OF OKLAHOMA - SCHOOL BUS MFG
- NORDAM GROUP – AEROSPACE
- PUBLIC SERVICE CO OF OKLA ELECTRIC UTILITY
- QUIKTRIP CORP - CONVENIENCE STORES
- REASOR'S FOODS – GROCERS
- SAINT FRANCIS HEALTH SYSTEM
- SPIRIT AEROSYSTEMS INC.
- ST JOHN MEDICAL CENTER
- STATE FARM INSURANCE
- UNIVERSITY OF TULSA
- VERIZON – COMM SERVICES
- WAL-MART
- WHIRLPOOL - ELEC & GAS RANGES
- WILLIAMS COMPANIES INC - OIL & GAS

HIGHLIGHTS | major employers

500-999

- BAMA COS WHOLESALE BAKERY
- CAPITAL ONE AUTO FINANCE LOAN SERVICING
- CENTRILIFT PUMPS
- DILLARD'S RETAIL
- FORD GLASS
- HILTI FASTENER MFG
- HOME DEPOT RETAIL
- JC PENNEY RETAIL
- JOHN ZINK CO INDUSTRIAL BURNERS
- METLIFE INSURANCE
- NATIONAL STEAK & POULTRY WHOLESALE MEAT
- ONEOK INC NATURAL GAS
- PENLOYD OFC CABINET MAKERS
- SAMSON INVESTMENT CO OIL & GAS
- SINCLAIR REFINER Y OIL & GAS
- SOUTHCREST HOSPITAL HEALTH CARE
- SUNOCO INC OIL & GAS
- UNITED STATES CELLULAR CELLULAR SERVICE
- VANGUARD CAR RENTAL HEADQUARTERS
- WARREN CLINIC HEALTH CARE
- WILTEL COMMUNICATIONS COMMUNICATION SERVICES
- WORLD PUBLISHING NEWSPAPER PUBLISHER

HIGHLIGHTS | major employers

250 - 500

- AG EQUIPMENT GAS COMPRESSORS
- AMERICAN FOUNDRY GROUP METAL PRODUCTS
- AMERISTAR FENCING
- ARVEST STATE BANK
- BAKER OIL TOOLS
- BURLINGTON NORTH SANTA
- CANCER TREATMENT CENTER
- CASE & ASSOCIATES PROPERTY MGMT
- CAVALRY PORTFOLIO SVCS COLLECTIONS
- CLAREMORE REG HOSPITAL
- COCA-COLA ENTERPRISES CUSTOMER DEV. CTR.
- COMMUNITYCARE HMO INSURANCE
- COX COMMUNICATIONS CABLE TV & PHONE
- CRANE CARRIER CO INDUSTRIAL TRUCKS
- CROWNE PLAZA HOTEL
- DELOITTE & TOUCHE ACCOUNTING
- DELPHI CATALYSTS AUTOMOBILE PARTS
- DMI INDUSTRIES WIND TOWERS
- FABRICUT DRAPERIES
- FINANCIAL MGMT SERVICES COLLECTIONS
- FINTUBE TECHNOLOGIES INC HEAT EXCHANGERS
- FLIGHT SAFETY FLIGHT SIMULATORS
- GANNETT CTR OF EXCELLENCE CUSTOMER SERVICE
- GEA RAINEY CORP HEAT EXCHANGERS
- H & R BLOCK INC TAX PREPARATION
- HANOVER CO COMPRESSORS
- KIMBERLY-CLARK TISSUE MFG

HIGHLIGHTS | major employers

250 - 500

- K-MAC ENTS/DBA TACO BELL RESTAURANTS
- LAUREATE PSYCHIATRIC CLINIC HEALTH CARE
- LINDE BOC GAS PROCESSING EQUIP
- MACY'S
- MAGELLAN MIDSTREAM PETROLEUM
- MAYS DRUG STORES
- MAZZIO'S CORP RESTAURANTS
- NCO FINANCIAL INC
- PACCAR WYNCH WINCH MFG
- PENNWELLPUBLISHING
- PEPSI-COLA BOTTLING
- RAMSEY WINCH CO
- RES-CARE OKLAHOMA HEALTH CARE
- SAM'S CLUB
- SEARS ROEBUCK & CO
- SEMGROUP ENERGY
- SHAW PIPE MFG
- SHEFFIELD STEEL STEEL FABRICATORS
- ST. GOBAIN CONTAINERS GLASS
- T D WILLIAMSON INC PIPE LINE EQUIPMENT
- TCIM SERVICES TELEMARKETING
- TPI BILLING SOLUTIONS FINANCIAL SERVICES
- UNARCO INDUSTRIES INC SHOPPING CARTS
- UNITED PARCEL SERVICE UNITED RECOVERY FINANCIAL SERVICES
- WEBCO INDUSTRIES INC STEEL PIPE & TUBES
- WEST TELESERVICES TELEMARKETING
- WONDER BREAD & HOSTESS CAKE BAKERS
- YUBA HEAT TRANSFER HEAT EXCHANGERS

T·I·P STRATEGIES

HIGHLIGHTS | business climate

immigration
land uses

- factors you don't control:
  - state tax policy
  - immigration (1804)
- and those you do:
  - land uses
  - infrastructure investment

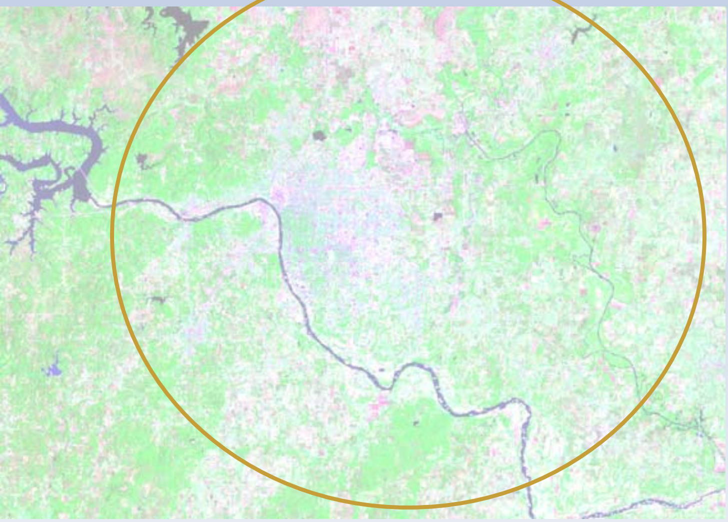
T·I·P STRATEGIES

HIGHLIGHTS | business climate

quality of place

quality of place

- different perceptions of what this means
- riverfront and downtown redevelopment have risen as priorities in recent years
- region maintains strong pull for existing residents and those who leave (and these connections are key to drawing people back to the area and retaining them)
- Same challenges as others in fostering growth of “next generation” workers



TIP | framework

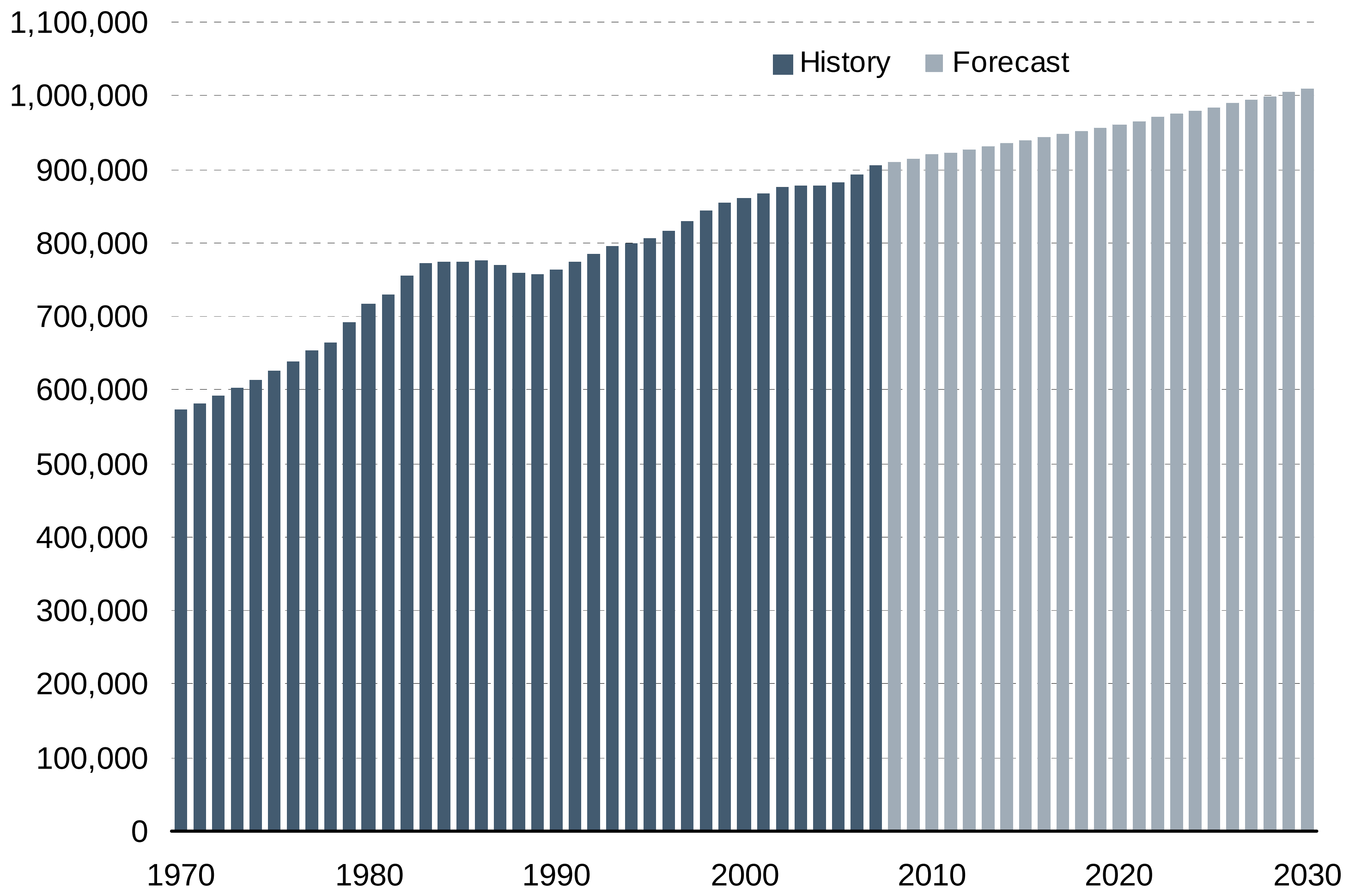
T·I·P STRATEGIES

TULSA | demographics

key findings

- Like the U.S., the population of Tulsa is aging and this has implications for the workforce.
- The balance of net migration between Tulsa and Oklahoma City has reversed from Tulsa's favor 10 years ago to OKC's favor today.
- Migration both to and from Pulaski County, AR (Little Rock) has accelerated.
- Migration outflow to big cities in Texas (Houston, Dallas, and Fort Worth) has declined in the past 10 years.

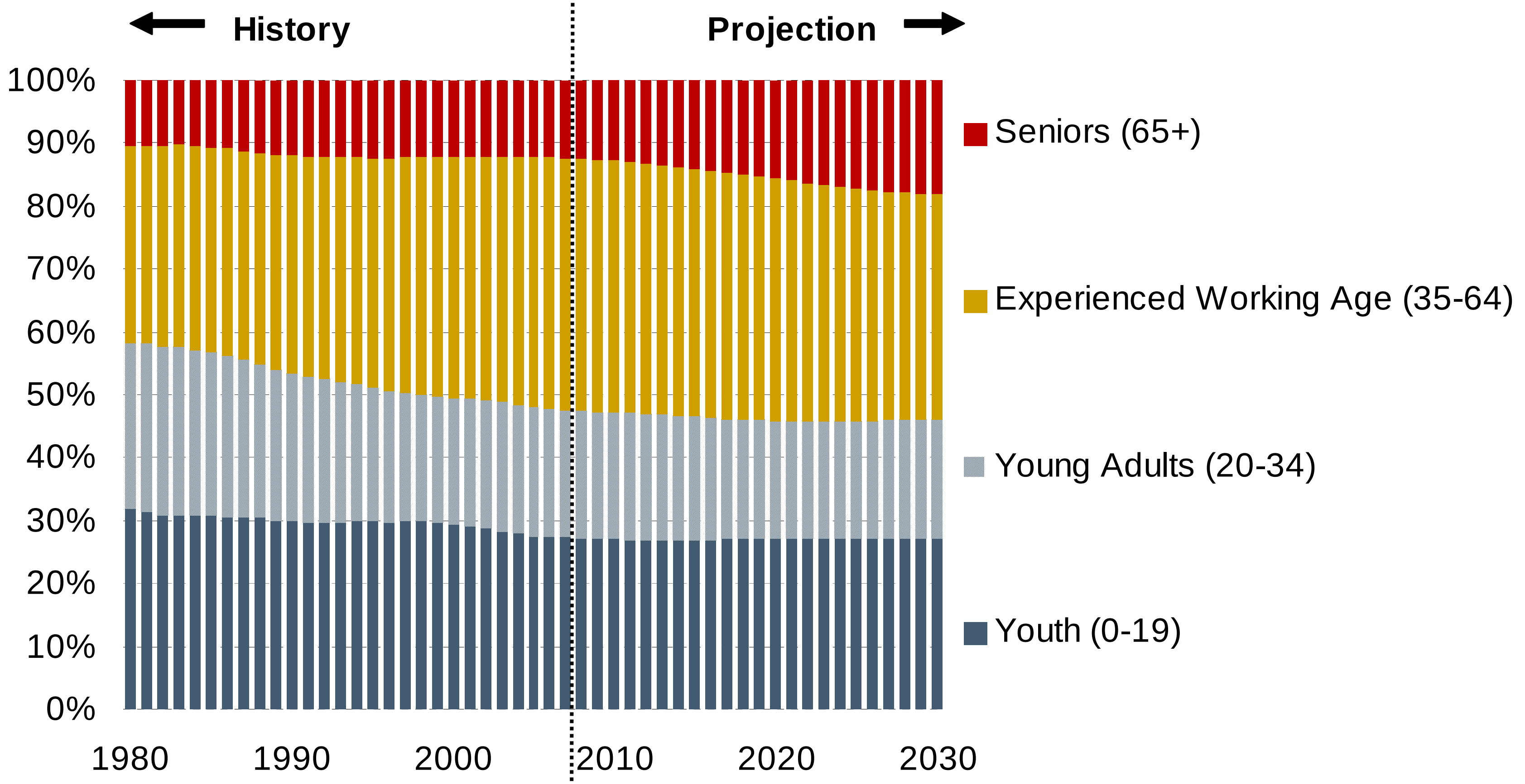
Population Projections
Tulsa MSA



T·I·P STRATEGIES

SOURCE: *US Census Bureau (history) & Moody's Analytics (projections)*

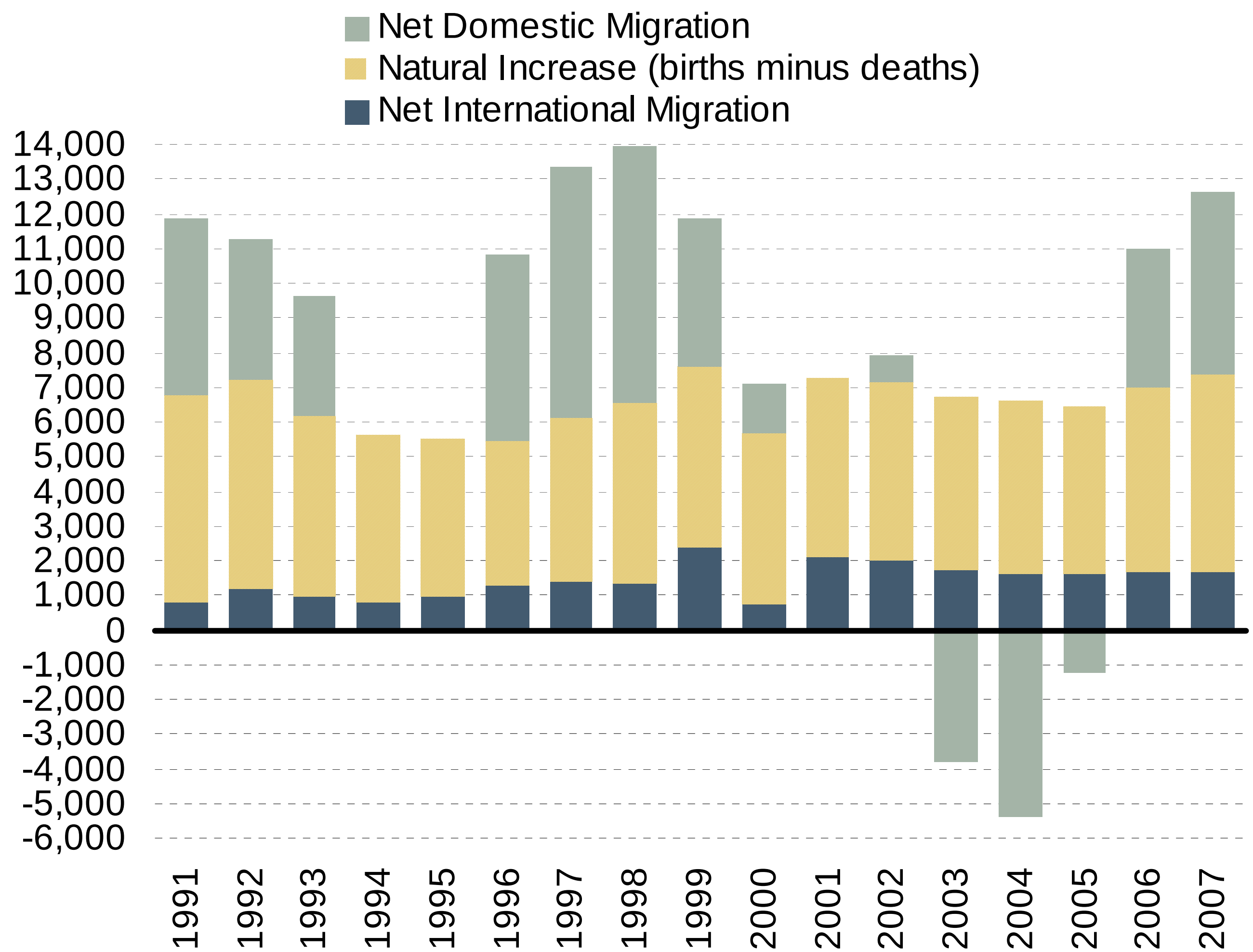
Distribution by Age Cohort, Tulsa MSA



SOURCE: *US Census Bureau (history) & Moody's Analytics (projections)*

T·I·P STRATEGIES

Components of Population Change, Tulsa MSA



T·I·P STRATEGIES

SOURCE: *US Census Bureau (accessed via Moody's Analytics)*

TULSA | industry patterns

key findings

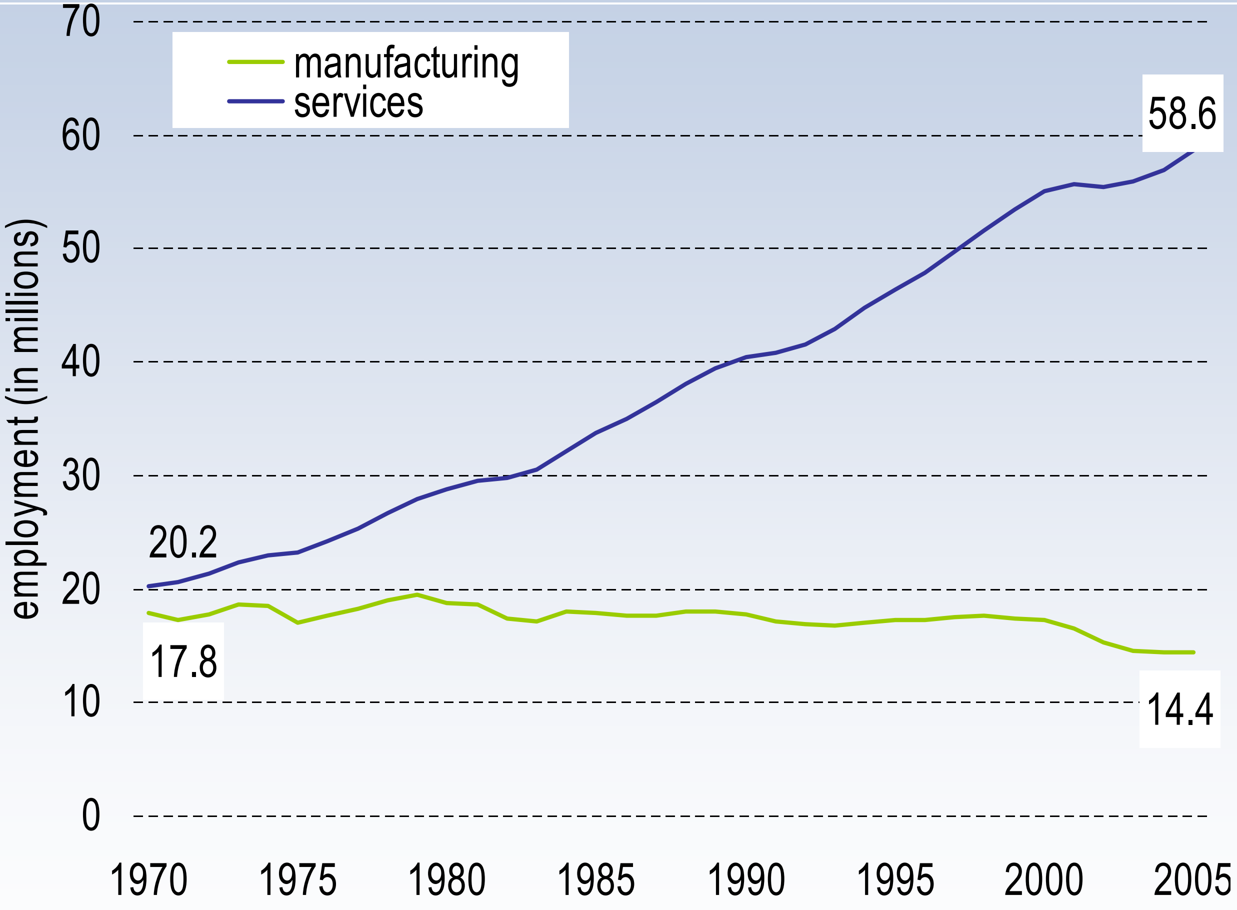
- The manufacturing and administrative services larger than expected for similar MSAs

but . . .

educational services and arts/entertainment sectors are smaller than might be expected.

- Within the city itself, job growth is concentrated on the outer fringes to the east and southeast. Meanwhile, the CBD has lost jobs in the past 10 years.

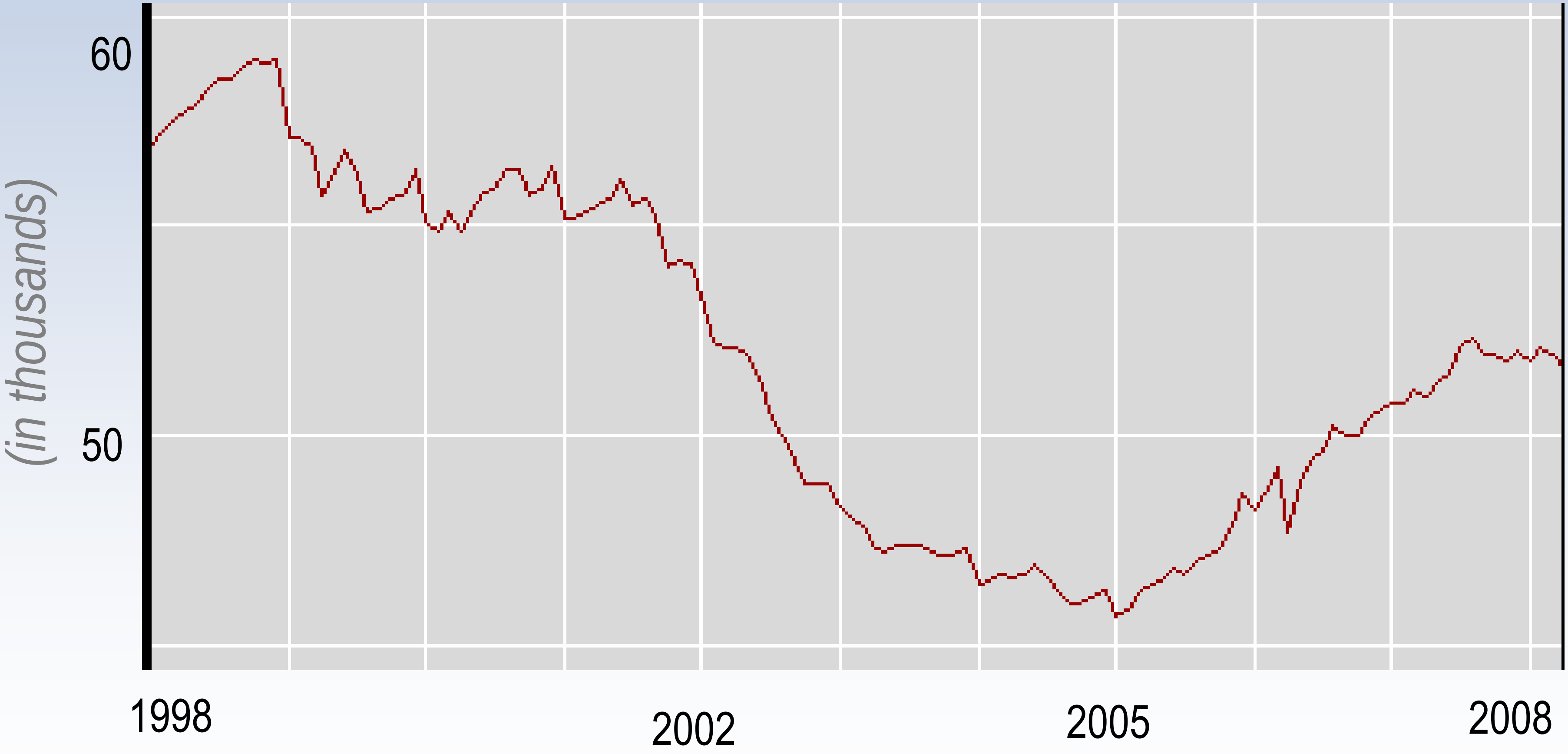
US | manufacturing vs. services



T·I·P STRATEGIES

SOURCES: *US Bureau Labor Statistics; Economy.com*

Manufacturing employment, Tulsa MSA



T·I·P STRATEGIES

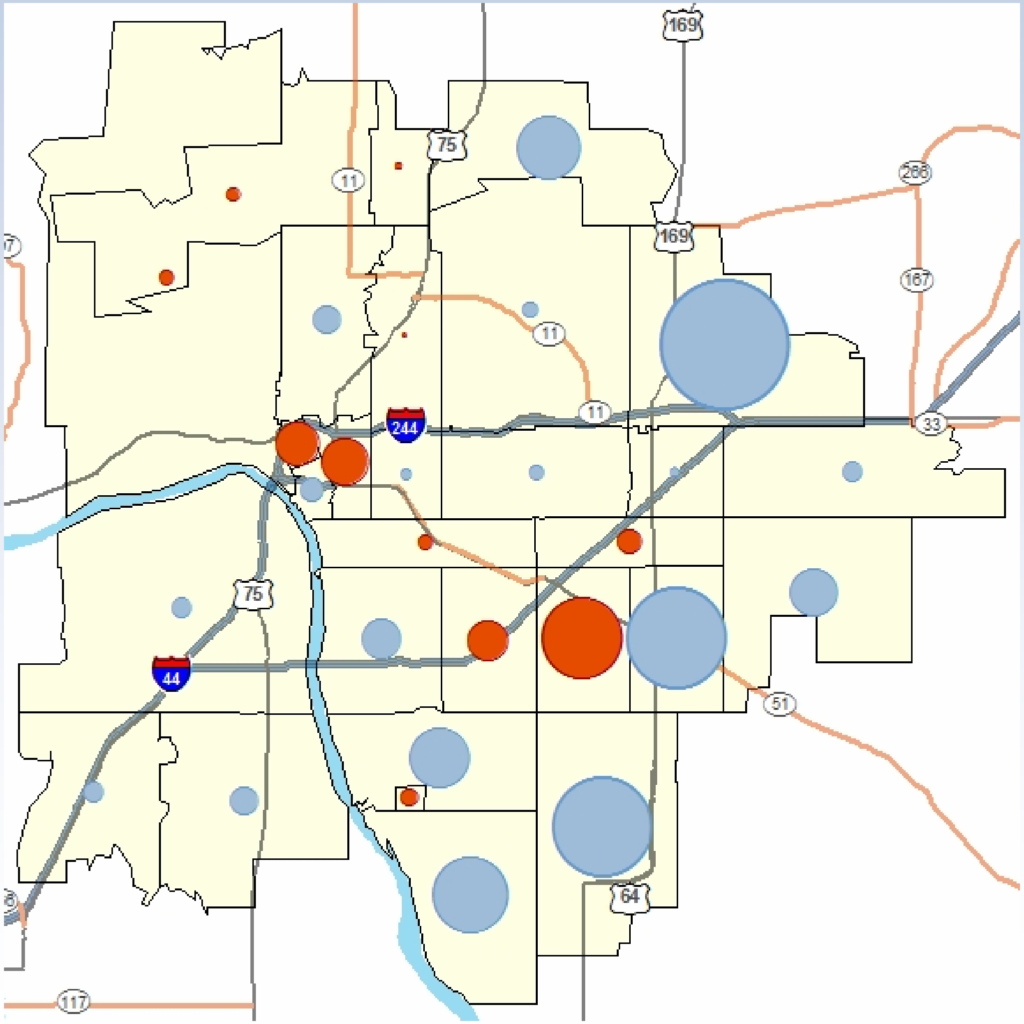
Tulsa MSA industry patterns, 2006

Industry Sector	Total Jobs in MSA	Tulsa County % of MSA	MSA Location Quotient
Retail trade	59,750	78%	0.98
Health care & social assistance	53,580	86%	0.96
Manufacturing	52,541	76%	1.12
Administrative & waste services	46,379	88%	1.36
Local government	40,529	67%	0.91
Construction	36,816	67%	1.00
Accommodation & food services	35,448	84%	0.93
Personal & miscellaneous services	32,707	71%	1.01
Professional & technical services	32,076	92%	0.86
Finance & insurance	25,124	84%	0.93
Real estate	23,783	78%	0.97
Transportation & warehousing	22,441	83%	1.23
Wholesale trade	21,391	86%	1.03
Oil, gas, & mining	18,892	49%	6.70
Information	12,178	92%	1.06
Farms	9,669	12%	1.06
Educational services	9,280	92%	0.79
Arts, entertainment, & recreation	7,871	75%	0.69
State government	7,540	70%	0.46
Corporate & regional offices	6,348	98%	1.06
Federal government (civilian)	4,700	74%	0.53
Federal government (military)	3,890	64%	0.60
Utilities	3,030	85%	1.67
Forestry & fishing	492	49%	0.15
Total	**566,455**	**78%**	**1.00**

NOTE: *Current-year data for Oil/gas/mining and forestry/fishing were suppressed. Numbers shown here are estimates based on previous-year ratios*

SOURCE: *U.S. Bureau of Economic Analysis (accessed via Moody's Analytics)*

Net job change by zip code within the City of Tulsa, 1995-2005



T·I·P STRATEGIES

SOURCE: *U.S. Census Bureau, Zip Code Business Patterns (accessed via Moody's Analytics)*

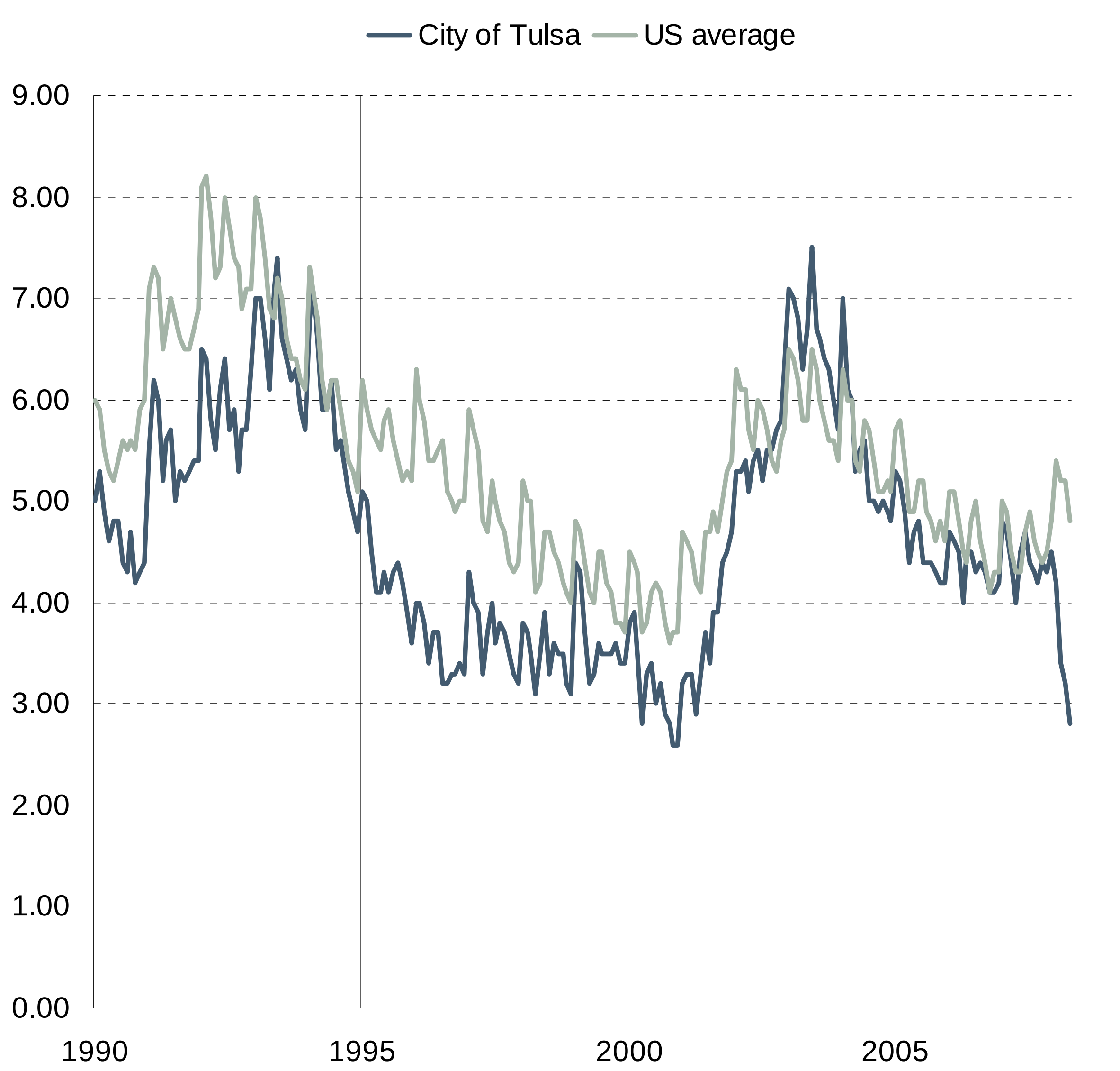
TULSA | labor market

key findings

- Tulsa's unemployment rate runs lower than national average, with sharp divergence in the mid-1990s and again recently.
- Recent low unemployment driven less by job growth than slow growth in civilian labor force.
- Tulsa has a strong pool of management talent, but a very wide pay differential makes this talent base vulnerable to poaching.

T·I·P STRATEGIES

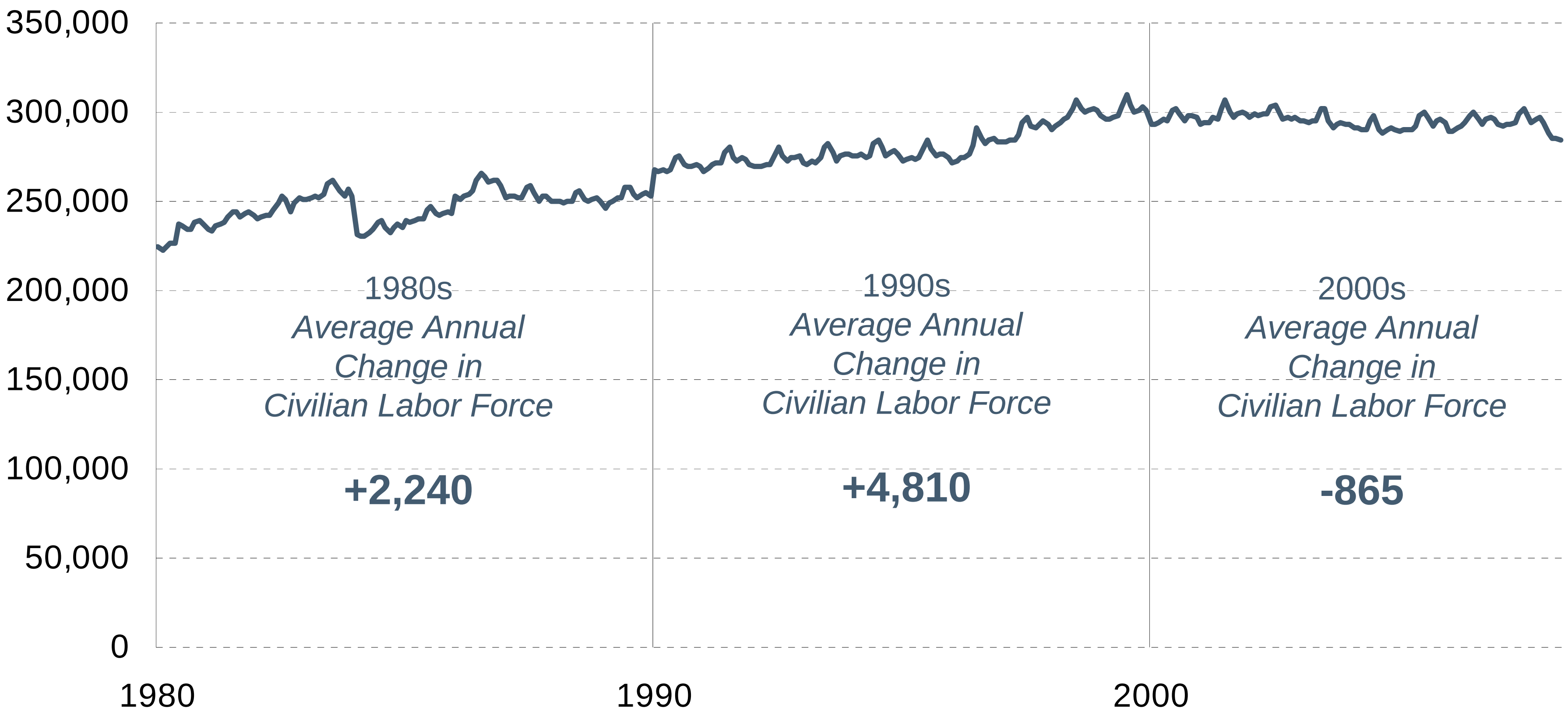
City vs. national unemployment rate



T·I·P STRATEGIES

SOURCE: *U.S. Bureau of Labor Statistics (accessed via Moody's Analytics)*

Civilian labor force growth, Tulsa County



SOURCE: *U.S. Bureau of Labor Statistics (accessed via Moody's Analytics)*

Employment in primary occupational groups, Tulsa MSA, 2007

Occupational group	Number of Jobs	LQ (US=1.00)
Office & administrative support	75,210	1.03
Sales	42,800	0.95
Production	40,200	1.26
Food preparation & serving	34,480	0.97
Transportation & material moving	27,890	0.92
Management	23,790	1.26
Installation & repair	22,900	1.35
Education, training, & library	22,570	0.86
Construction & extraction	21,970	1.04
Healthcare (technical)	20,920	0.97
Business & finance	17,010	0.90
Healthcare (support)	13,630	1.20
Property maintenance	10,870	0.79
Computer & mathematical	9,850	0.98
Protective service	8,710	0.90
Architecture & engineering	8,610	1.10
Personal care & service	7,650	0.73
Arts, entertainment, & media	3,910	0.71
Community & social services	3,710	0.66
Legal	2,480	0.79
Life, physical, & social science	2,410	0.61
Farming, fishing, & forestry	350	0.25

T·I·P STRATEGIES

SOURCE: *U.S. Bureau of Labor Statistics (2007 annual occupational data released May 9, 2008)*

Occupations with 500+ jobs and LQs of 1.50+, Tulsa MSA, 2007

Occupational group	Number of Jobs	LQ (US=1.00)
General & operations managers	7,990	1.54
Team assemblers	5,970	1.63
Cooks, fast food	3,600	1.99
Welders, cutters, solderers, & brazers	3,330	2.75
Computer support specialists	3,140	1.90
Aircraft mechanics & service technicians	3,030	8.12
Machinists	2,760	2.14
Chief executives	2,720	2.90
Bill & account collectors	2,450	1.90
Inspectors, testers, sorters, & weighers	2,230	1.50
Cooks, institution & cafeteria	1,780	1.52
First-line supervisors/managers of vehicle operators	1,460	2.08
Production, planning, & expediting clerks	1,420	1.59
Electrical & electronic equipment assemblers	1,230	1.81
Cutting, punching, & press machine operators	1,210	1.52
Structural metal fabricators & fitters	1,130	3.34
Cement masons & concrete finishers	1,060	1.58
Reservation & transportation ticket agents & travel clerks	900	1.71
Industrial production managers	850	1.77
Coating, painting, & spraying machine operators	840	2.61
Mixing & blending machine operators	760	1.74
Insurance underwriters	750	2.41
Helpers of electricians	710	2.23
Mechanical drafters	690	2.96
Computer & office machine repairers	660	1.58
Excavating & loading machine operators	630	2.95
Vocational education teachers, postsecondary	600	1.70
Family & general practitioners	600	1.69
Tire repairers & changers	580	1.84
Petroleum pump & refinery operators & gaugers	560	4.12

SOURCE: *U.S. Bureau of Labor Statistics (2007 annual occupational data released May 9, 2008)*

Pay level for occupations with 500+ jobs and LQs of 1.50 +, Tulsa MSA, 2007

Occupational group	Local Median Salary	% of U.S. Median
Chief executives	$96,380	na
Industrial production managers	$74,750	93%
General & operations managers	$63,930	72%
Aircraft mechanics & service technicians	$57,150	117%
First-line supervisors/managers of vehicle operators	$56,430	113%
Petroleum pump & refinery operators & gaugers	$53,800	101%
Mechanical drafters	$45,000	101%
Vocational education teachers, postsecondary	$43,330	95%
Insurance underwriters	$40,000	73%
Production, planning, & expediting clerks	$35,220	89%
Computer & office machine repairers	$34,930	94%
Inspectors, testers, sorters, & weighers	$34,440	114%
Machinists	$33,600	95%
Excavating & loading machine operators	$33,230	98%
Welders, cutters, solderers, & brazers	$33,070	102%
Mixing & blending machine operators	$31,220	103%
Structural metal fabricators & fitters	$30,100	97%
Cement masons & concrete finishers	$28,670	85%
Electrical & electronic equipment assemblers	$28,270	107%
Bill & account collectors	$28,240	94%
Reservation & transportation ticket agents & travel clerks	$28,190	95%
Coating, painting, & spraying machine operators	$27,390	99%
Computer support specialists	$27,360	65%
Cutting, punching, & press machine operators	$25,830	95%
Helpers of electricians	$23,790	96%
Team assemblers	$23,600	96%
Tire repairers & changers	$18,930	87%
Cooks, institution & cafeteria	$17,770	83%
Cooks, fast food	$14,950	93%
Family & general practitioners	na	na

$28,380 MSA avg.

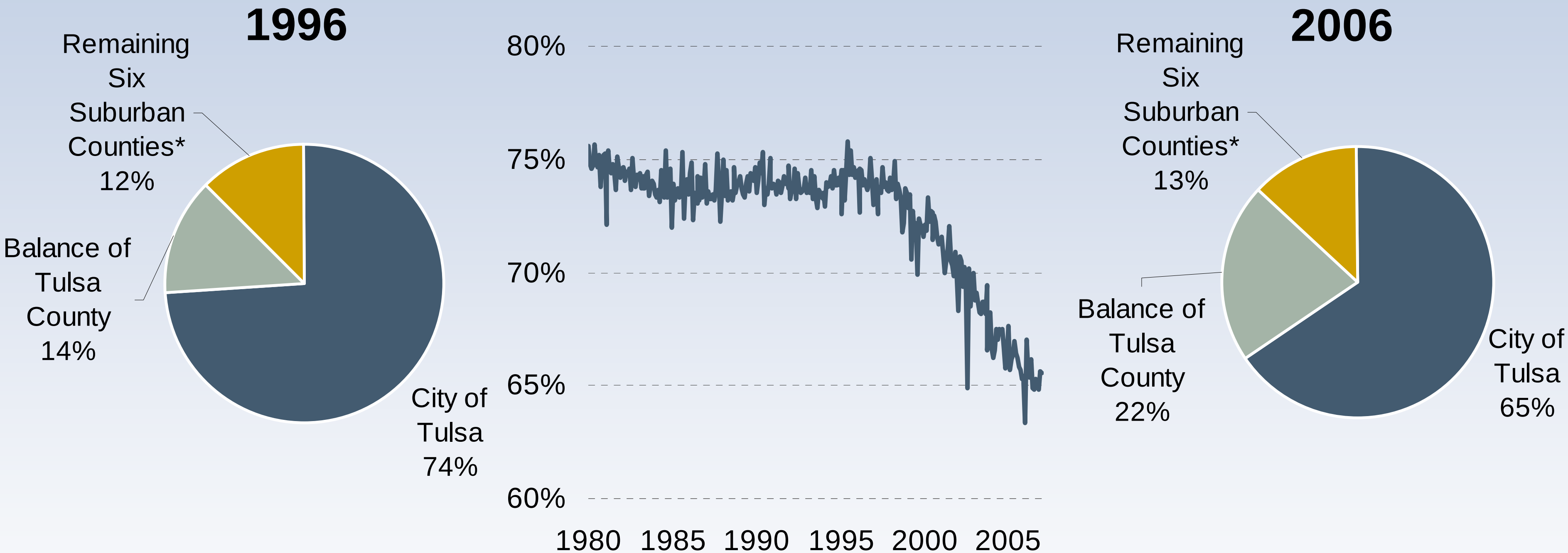
SOURCE: *U.S. Bureau of Labor Statistics (2007 annual occupational data released May 9, 2008)*

tulsa | RETAIL PATTERNS

key findings

- According to Oklahoma Tax Commission data, the city's share of taxable sales in the MSA has fallen from 74% to 64% in the past ten years.
- Surrounding jurisdictions within Tulsa County have gained at the City of Tulsa's expense.

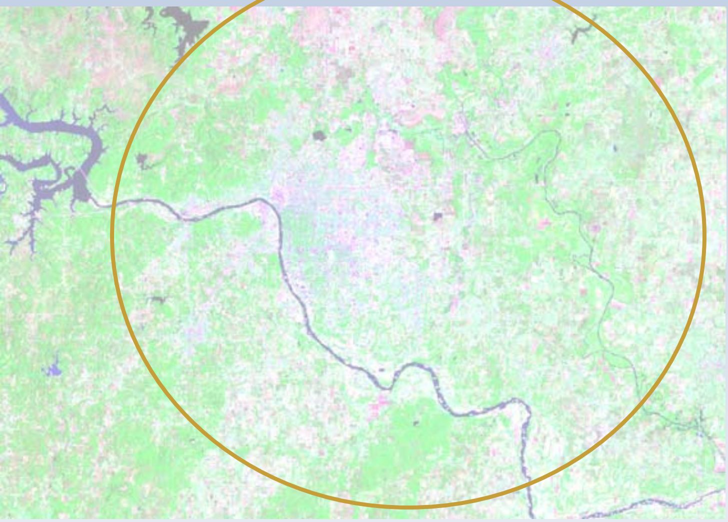
Sales subject to tax: City of Tulsa's declining share of the Tulsa MSA



*NOTE: *In addition to Tulsa County, the MSA includes Creek, Okmulgee, Osage, Pawnee, Rogers, and Wagoner Counties.*

SOURCE: *Oklahoma Tax Commission (accessed via the Center for Economic and Management Research at the University of Oklahoma)*

T·I·P STRATEGIES



TIP | themes

T·I·P STRATEGIES

TULSA | plans (and more plans)

- Multiple players, multiple themes
- “Left hand, say hello to right hand . . .”

a common vision is essential

TULSA | players

INCOG

tulsa now tulsa

Tulsa Metro Chamber

City of Tulsa Oklahoma

Workforce Tulsa

AEP Public Service Company of Oklahoma
A unit of American Electric Power

Advantage
Oklahoma Department of Commerce

Tulsa County

Vision2025

Tulsa Community Foundation
Charity With Choice

Tulsa Technology Center

TEDC CreativeCapital

THEMES | workforce

workforce

demographics

- slow growth of target demographic

means need for talent attraction

education

- performance of local schools and potential for TCC, TU, OSU, OU

means need for aligning economic development, workforce development, & higher education

skills

- high local concentrations of skilled labor and lower pay levels

means need for re-thinking target industries

THEMES | regional growth

growth

Concerns about competitiveness…

– Tulsa’s growth has gradually been slipping behind the US

– Growth patterns within the city and the county have been uneven

transition

THEMES | transitional economy

- Transition from natural resource economy to . . .?
  - Advanced manufacturing
  - Technology-driven services
  - Entrepreneurship and free agency

thank you

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Transportation Element

How Does Tulsa Compare?

Fregonese Associates

Kimley-Horn and Associates, Inc.

PLANiTULSA
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TOPICS

Highway and Roadway Network Capacity

Transit Capacity

Bicycling and Walking Opportunities

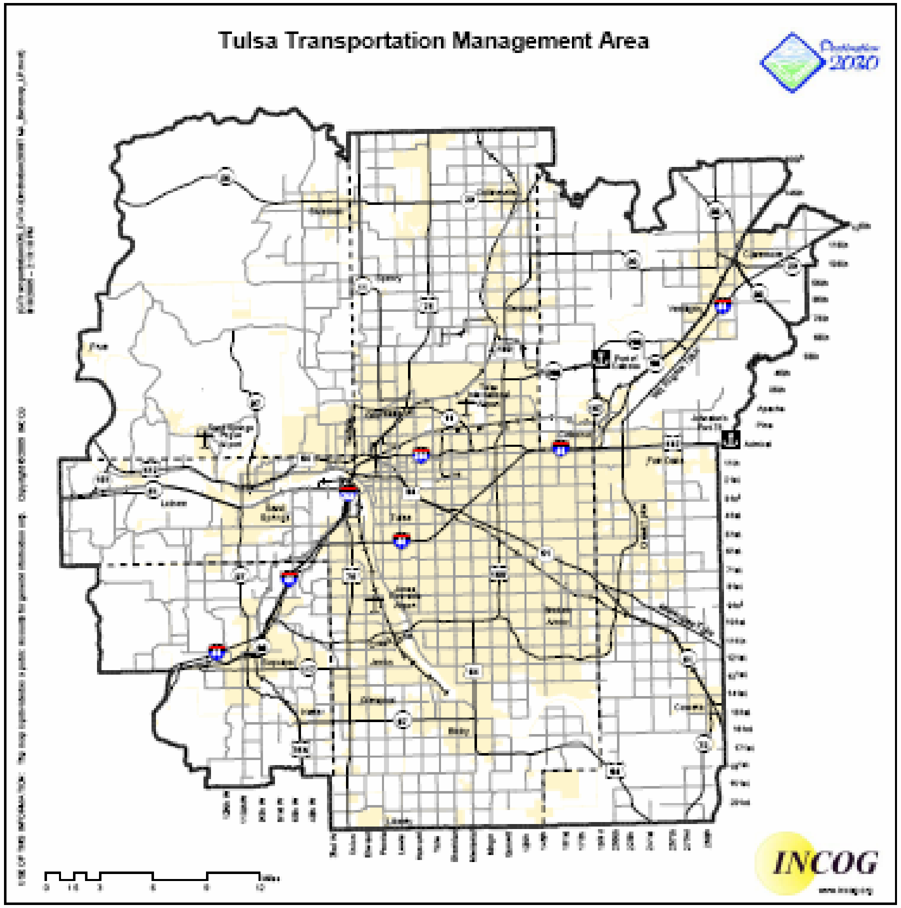
TULSA, OKLAHOMA

Metro Population: 803,235

City Population: 393,049

Transit Ridership: 2,661,245

Total Lane Miles: 1,526



Fregonese Associates

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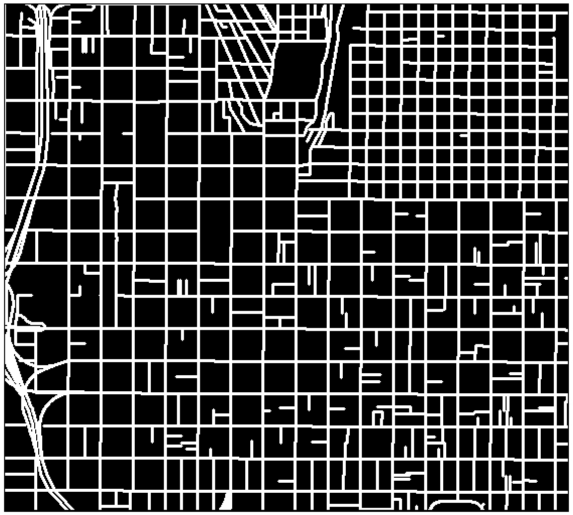
NETWORK DESIGN

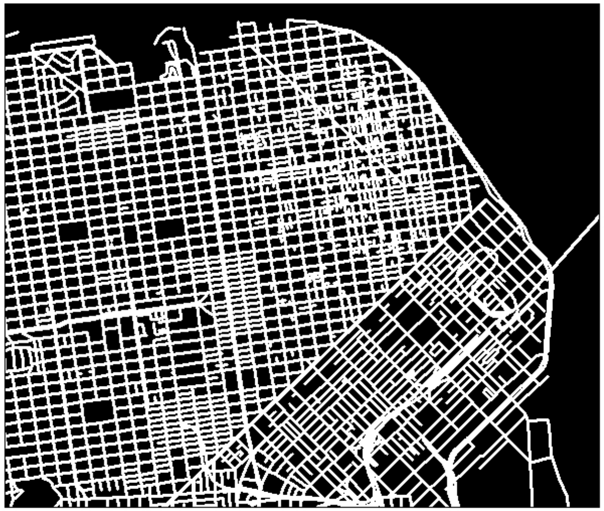
Boston

Tulsa

Salt Lake City



San Francisco



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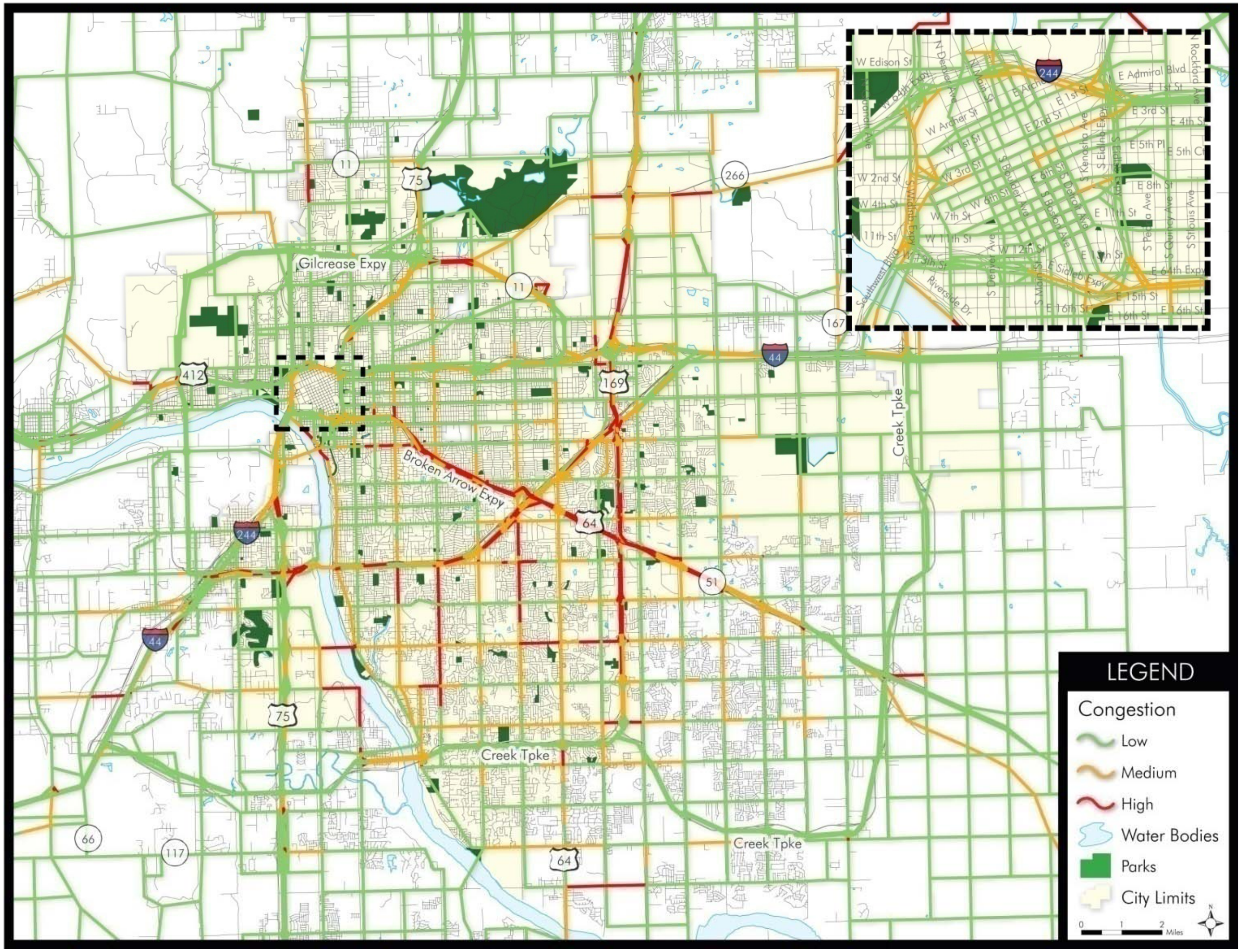
V/C RATIO OR CONGESTION (24HR)



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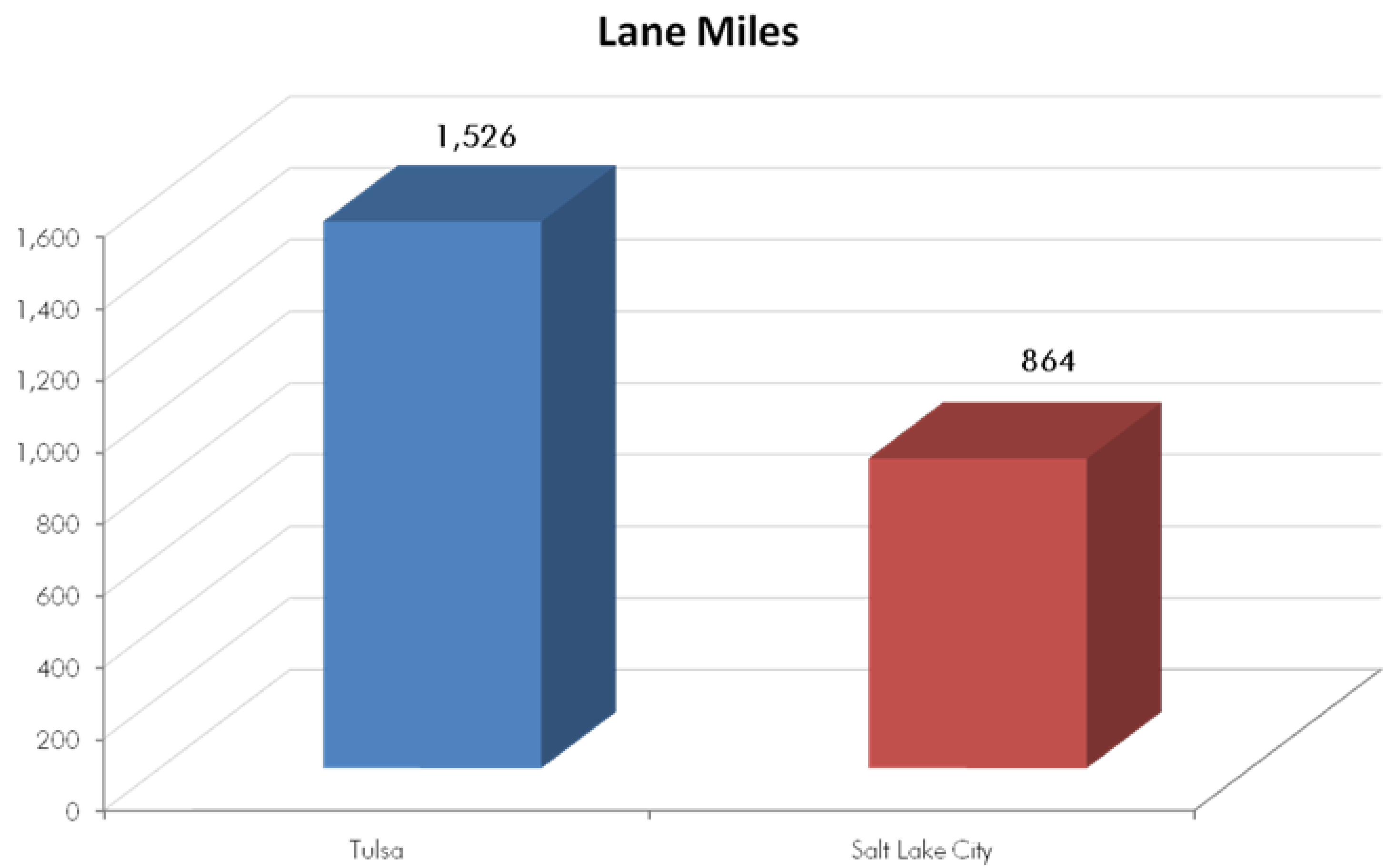
ROADWAY INDICATORS



Source: Tulsa: INCOG (2006)
Albuquerque: Mid-Region COG (2000)
Charlotte: Kimley-Horn & Associates (2000)
Salt Lake City: Wasatch Front Regional Council (2005)

Fregonese Associates

Kimley-Horn and Associates, Inc.

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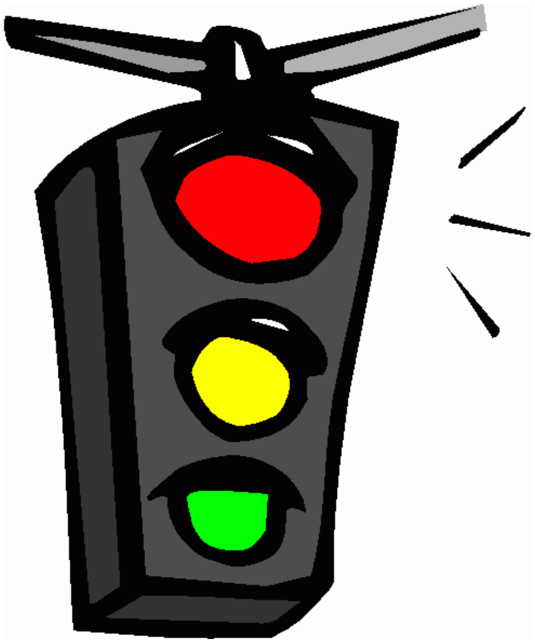
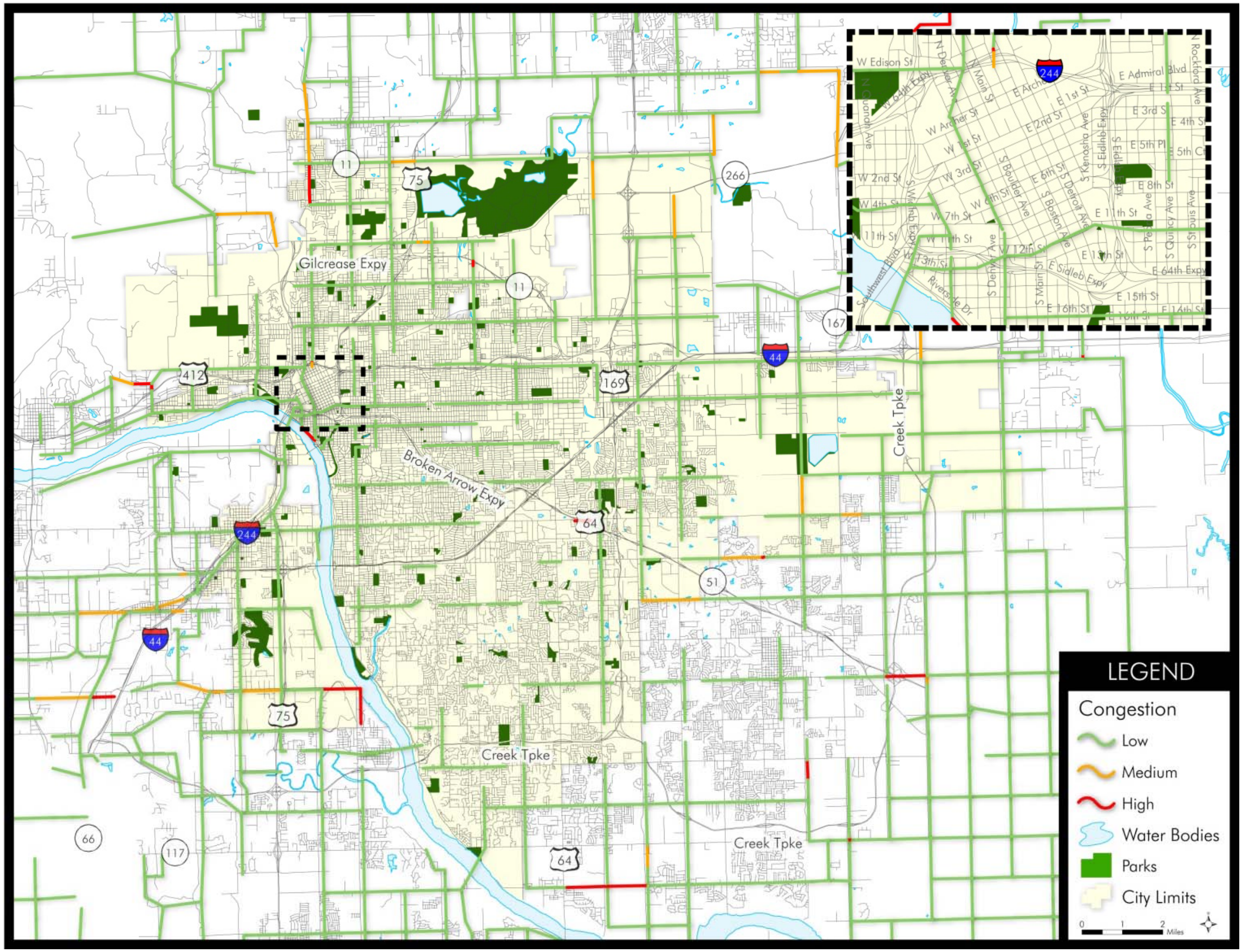
SYSTEM OPERATIONS & MAINTENANCE



- City of Tulsa operates 465 signals
    - Limited system coordination
- Land Development Impact Analyzes determine implementation of new traffic signals
    - Funding: Privately Funded Public Improvements (PFPI) at 100%
    - Signals can cost between $125 and $150 thousand

V/C RATIO – SECONDARY ARTERIALS
WITH ADT LESS THAN 20,000



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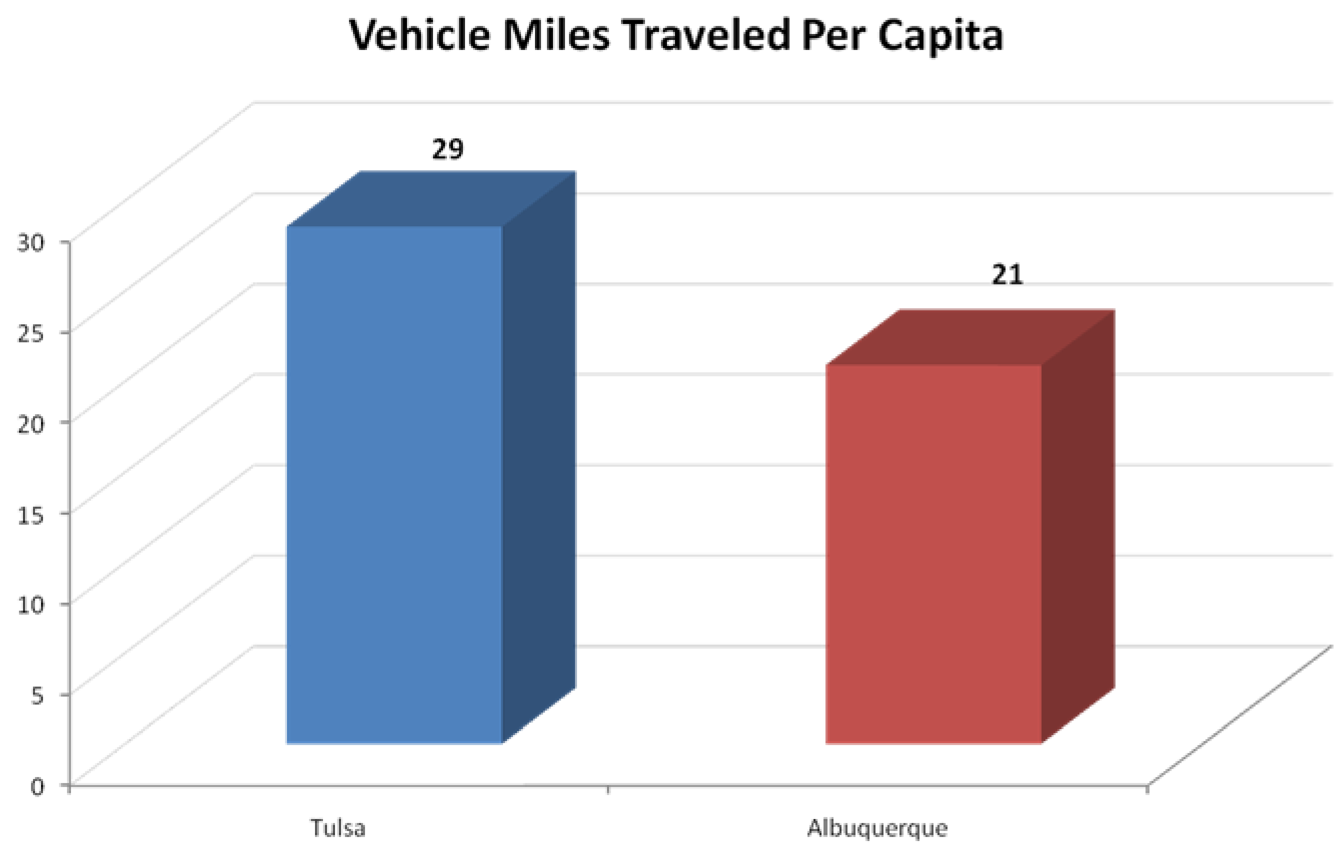
STREET-SCALE URBAN REDESIGN

Four-Lane Undivided Roadway Conversion to a Three-Lane Cross Section are viable for roadways with a maximum ADT of 16,000. They have been accomplished up to 24,000 ADT.

ROADWAY INDICATORS



Source: Tulsa: INCOG (2006)
Albuquerque: Mid-Region COG (2000)

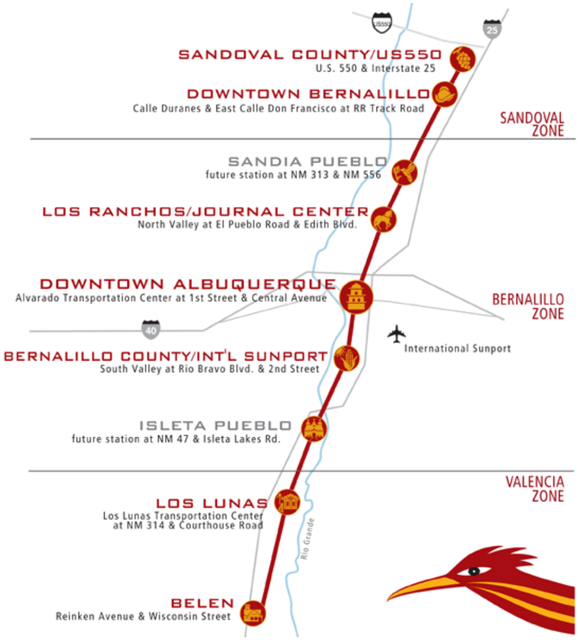
ALBUQUERQUE, NEW MEXICO

Metro Population: 729,649

City Population: 448,607

Transit Ridership: 8,751,698

Total Lane Miles: 2,334



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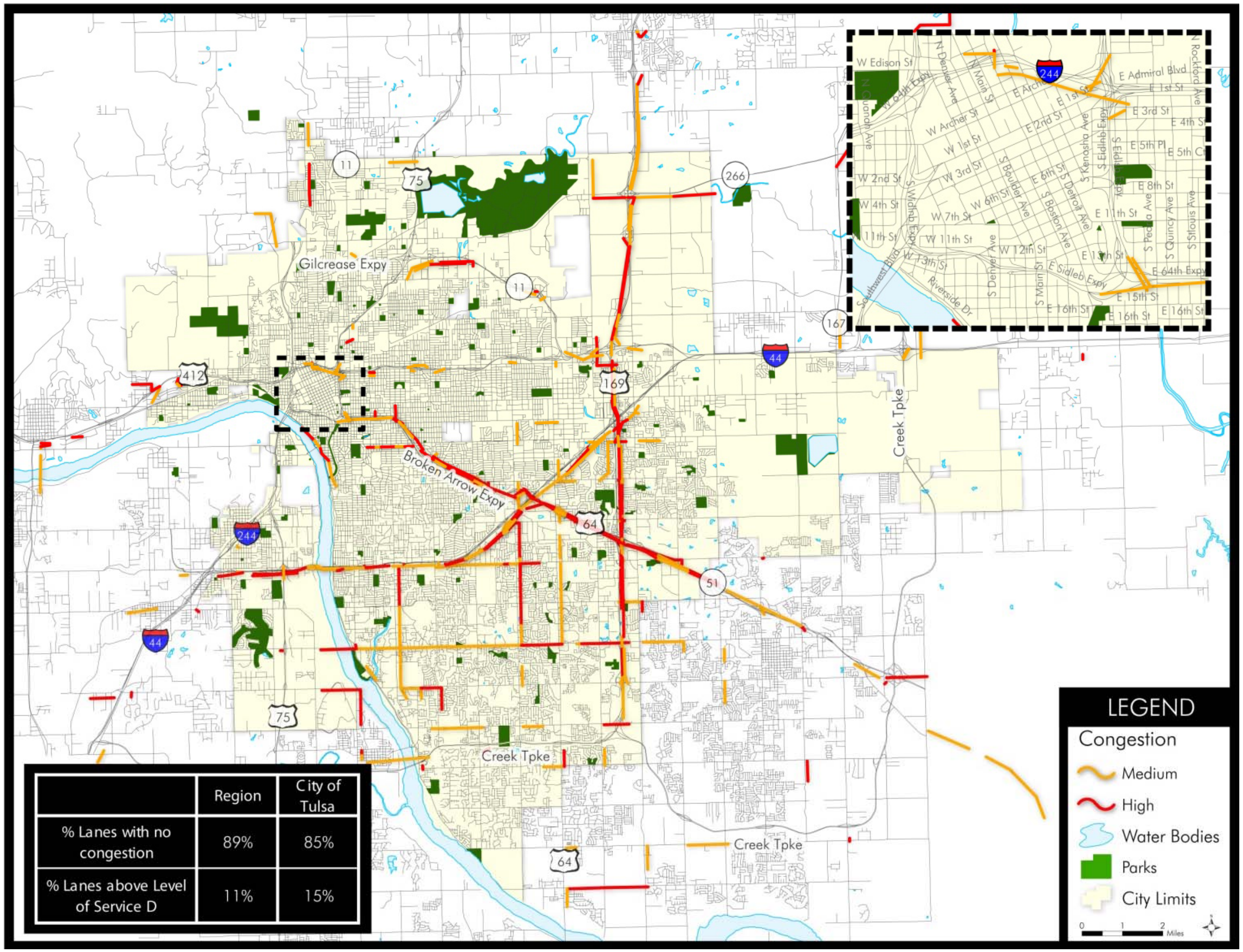
V/C RATIO

LANES WITH LEVEL OF SERVICE D AND ABOVE



	Region	City of Tulsa
% Lanes with no congestion	89%	85%
% Lanes above Level of Service D	11%	15%

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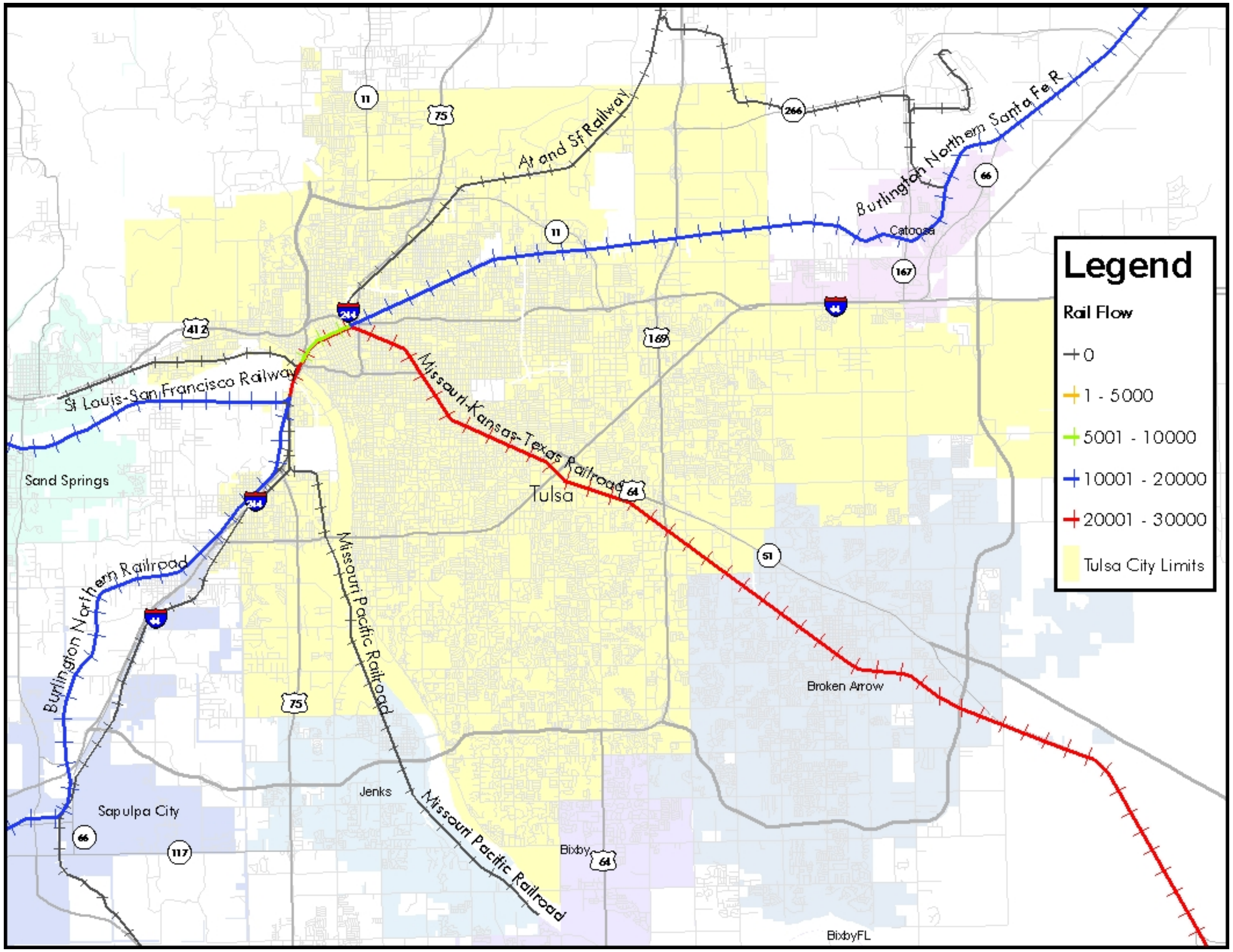
FREIGHT RAIL INVENTORY



Source: US DOT Bureau of Transportation Statistics (2000)

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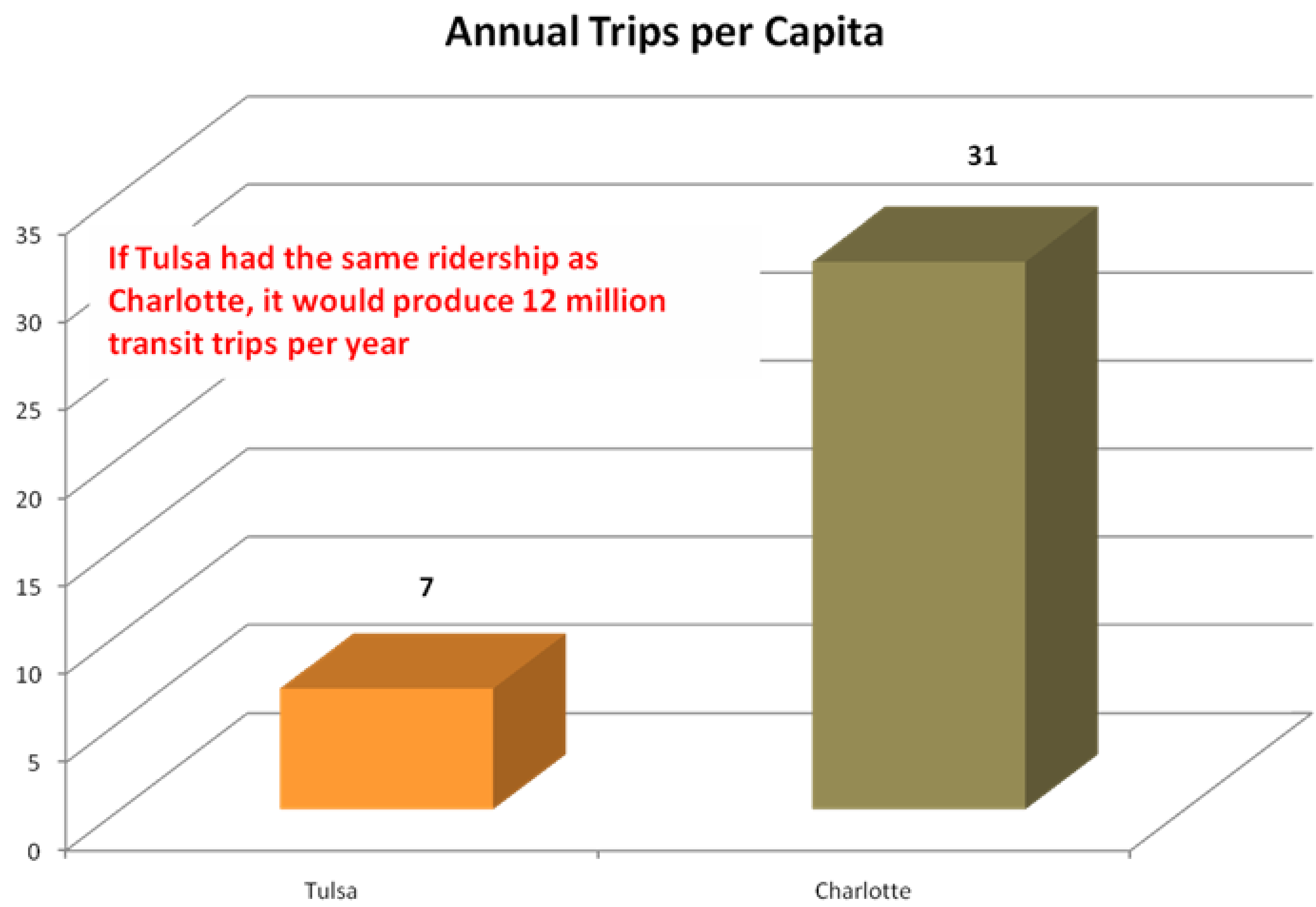
TRANSIT INDICATORS – RIDERSHIP



Source: National Transit Database (2006)

CONCLUSION

Highway and Roadway Network Capacity

- Many opportunities for redesign and construction to achieve higher performance

Transit Capacity

- Potential for increased commuter transit along congested freeway corridors and new transit markets

Multi-modal Demand

- Opportunity for street scale urban redesign of arterials that will create new economic opportunities

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Upcoming Events

- July 2008 - Community Values
- September 2008 - City Wide Workshops
- January 2009 - Community Workshops
- April 2009 - Scenarios
- June 2009 - Vision
- September 2009 – Draft Plan & Implementation
- Adoption Hearings – October – December 2009

FREGONESE ASSOCIATES

Thank You

FREGONESE ASSOCIATES