



# CENTRAL OKLAHOMA ECONOMIC DEVELOPMENT DISTRICT

2022-2026 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

# COEDD

A REGIONAL COUNCIL OF GOVERNMENT

PAGE LEFT INTENTIONALLY BLANK

# TABLE OF CONTENTS

05 | Introduction

06 | Summary Background

07 | Geography & Natural Resources

08 | Economic Indicators

21 | Target Sectors

38 | Economic Resilience

48 | SWOT Analysis

58 | Strategic Direction

59 | Attraction & Placemaking

62 | Emerging Industries & Occupations

65 | Leadership & Representation

68 | Funding & Infrastructure

72 | Evaluation Framework

83 | Appendix

84 | County Snapshots

98 | Jamboard Slides

101 | Acknowledgements







# INTRODUCTION

The Central Oklahoma Economic Development District (COEDD), or Sub-state Planning District #5, was formed in 1967. COEDD provides economic development services to Hughes, Lincoln, Okfuskee, Pawnee, Payne, Pottawatomie, and Seminole counties. The organization has secured over \$20 million in grant funding through the EDA, and those grant funds have created more than 5,000 jobs in the region. The priorities of the organization are to improve infrastructure, create jobs, and improve local economies throughout the region. COEDD contributes planning assistance and consultation to member communities through two funding agencies: Oklahoma Department of Commerce and the U.S. Economic Development Administration (EDA). COEDD provides access, technical assistance, and administrative oversight for federal and state grant programs including Community Development Block Grants (CDBG), Rural Economic Action Plan (REAP).

## What is a CEDS?

“ A Comprehensive Economic Development Strategy (CEDS) is a unified, regionally focused action plan that provides a framework for an area’s economic growth and community development. ”

COEDD released the draft Comprehensive Economic Development Strategy document to the public for comment for a period of no less than 30 days. Participating stakeholders were notified and a press release was submitted to regional news outlets. No public comments were received.

A diverse working group of local representatives from private, public, and nonprofit sectors developed the CEDS to identify regional opportunities and align stakeholder priorities in order to actualize the community’s goals and strategies. This working group builds on local partnerships to implement the action plan and meet performance measures for economic and community development at the regional, state, and federal levels. The following sections form the basis for the Central Oklahoma Economic Development District (COEDD) Comprehensive Economic Development Strategy (CEDS).

### This CEDS will include:

- *Summary Background* of the region’s economic conditions and demographics
- *SWOT Analysis* to identify the region’s strengths, weaknesses, opportunities, and threats
- *Strategic Direction* – to incorporate tactics identified through the planning process, other plans, and stakeholder feedback to develop the priority strategies for the region
- *Evaluation Framework* – to identify and monitor performance measures associated with the plan.
- *Economic Resilience* – to assess and develop strategies for improving the region’s ability to prepare for and respond to economic shocks.

### How to use this plan:

This plan outlines goals and strategies to strengthen the regional economy, improve quality of life, and develop and retain talent. This plan will guide the program of work for the Central Oklahoma Economic Development District from 2022-2026.

# SUMMARY BACKGROUND

## Historical Overview

The Central Oklahoma Economic Development District (COEDD), is comprised of seven counties, including Hughes, Lincoln, Okfuskee, Pawnee, Payne, Pottawatomie, and Seminole. The district is located just east of the center of Oklahoma and stretches north to south. The district also lies in between the metropolitan areas of Oklahoma City and Tulsa and is bounded by the Arkansas River to the North, and the South Canadian River to the South.

The COEDD District has been impacted by several events throughout history and reflects many of the same characteristics of the state. Around the 1900's the COEDD area land belonged to Indian Territory and contained nine tribes, the largest being Creek Nation. In 1903, the land was opened for sale, with many of the Indian owners' selling to purchasers who were small farmers trying to make a living.

In the early 1920's oil was found in the region's borders and the economy of the region "boomed". For a short period of time, Seminole County accounted for 1/3rd of all oil produced in the world. With a booming economy, in 1930, the population peaked at 360,283 people. With over production of oil nationally, the

area subsided and entered a "bust" cycle, as people who were in search of new jobs began to migrate out. The region lost more than 150,000 people in a 30-year span, and today, after a slow recovery of population, currently resides at roughly 250,000 people.

There is no denying the oil industry has had an incredible effect on the history of the region. That said, the COEDD Region has battled population and business loss over the years and now has several stable, reliable, and growing communities. Stillwater and Shawnee, Oklahoma, both county seats and holding Universities in their cities, are growth centers for the region. The region has also seen strong growth in a multitude of industries, including the transportation, healthcare, and government sectors. Educational attainment has risen in the region in the past 20 years, and the region holds a strong network of Technology Centers offering several different programs and certificates. While the region has benefitted from rapid infusions of oil money, encouraging growth in new and emerging sectors as well as improving the quality of life in the region are both primary goals of the COEDD region moving into the future.

## Geography and Natural Resources

The COEDD Region sits in a geographically optimal location in Central Oklahoma, situated between Oklahoma City and Tulsa, and within the Midwest United States. With 2,267 bridges, access to U.S. Interstates and Highways, 222 route miles of freight railroad, and over 3 billion Person Trips through the region in 2020, the region has a wealth of infrastructure. (<https://www.bts.gov/ctp>)

Additionally, the region has several rivers running through the area, bringing in fresh water and goods. While the land in the region has historically not been known for cultivation, farming is present in the region along with other forms of agriculture.

The region is home to an abundance of Native American tribes, including the Citizen Potawatomi Nation, Kickapoo, Sac and Fox, Pawnee, Creek, Seminole, Choctaw, and Otoe-Missouria. Not only do the tribes represent the rich history of the area, but they also strongly represent the population in the region and are a vital part of the region's economy.



Figure 1: Oklahoma Lakes and Rivers Map, GISGeography

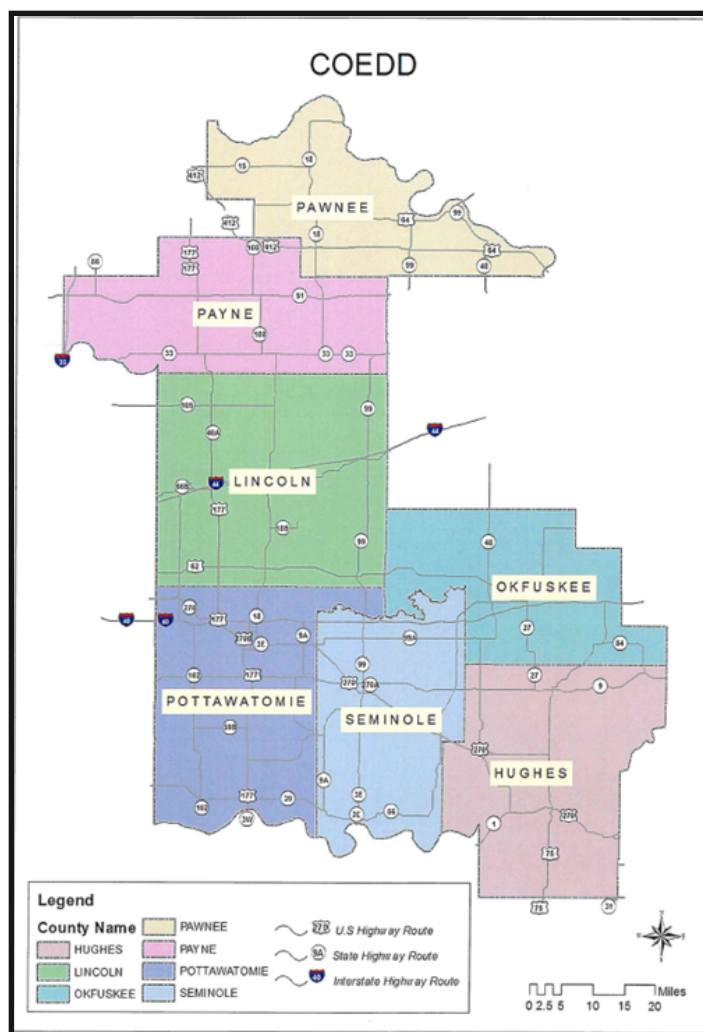


Figure 2: COEDD County Map, COEDD



## Economic Indicators

The COEDD Region has a growing population, with low unemployment and an increasingly more educated and diverse workforce. Several industries are experiencing significant growth, while over half of the top ten fastest growing occupations pay above the median hourly wage. That said, poverty rates in the region remain above average and median and per capita income fall well below state averages.

## Population

Over the past five years, the population in the COEDD region has remained relatively steady, increasing just 0.7% from 2015 to 2020. A main reason for this increase in growth is due the jump in population from 2019 to 2020, where the region gained roughly 2,000 people. With that said, the population is expected to increase 3.0% over 2020 to 2025, growing an additional 7,839 people. This increase in growth is a positive sign for the region, as many counties, especially many rural counties in Oklahoma and around the country, are seeing, and expected to see population declines.

### Historic and Projected Population of COEDD Region (2015-2025)

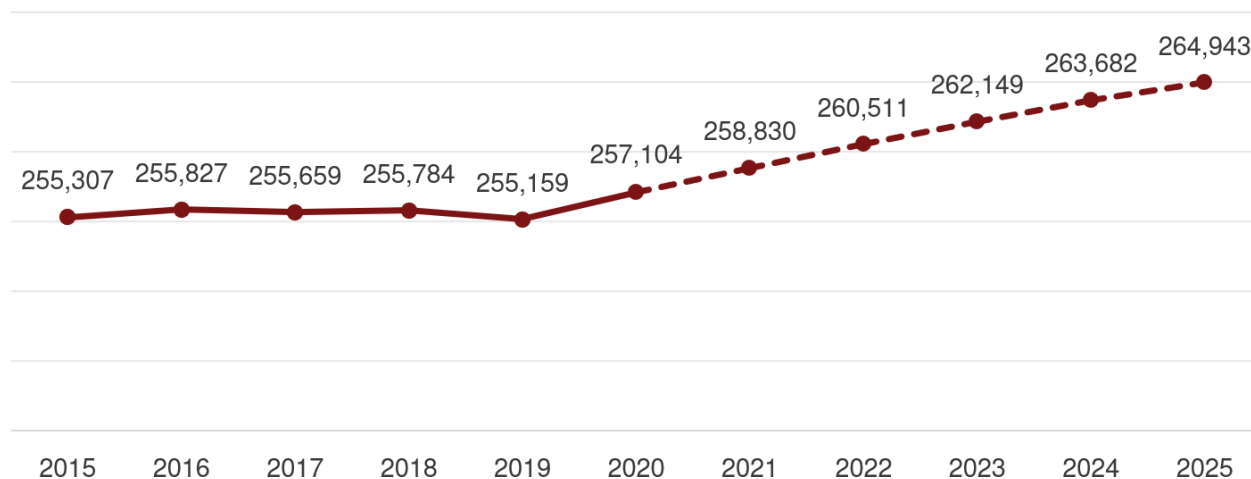


Figure 3: Population Projections, US Census Bureau, 2019 ACS 5-Year Estimates

For the year 2020, the COEDD population represents roughly 6.5% of the Oklahoma population. As previously mentioned, the COEDD Region grew 0.7% in the past five years, growing roughly 1% slower than the state during this time span. That said, the region is expected to outperform the state in the next five years, as the expected increase in population is 3.05% (7,839 people), about 1.2% higher than Oklahoma's growth of 1.87% (74,535 people).

Payne County is the largest county in the region, representing 32.3% of the total population. Payne County also saw the largest increase in people that last five years (1,725) and is projected to see the largest growth in the next five years with 5,435 people (7% increase). Payne and Pottawatomie County make up over 60% of the total population in the region and contribute to a majority (over 90%) of the future projected population growth. Four counties lost population over the last five years, with Seminole County projected to be the only county in the next five years that is expected to continue to see declines.

Table 1: Population Comparison, US Census Bureau, 2019 ACS 5-Year Estimates

Area	2020 Population	Change (2015-2020)		Projected Change (2020-2025)	
COEDD Region	257,104	1,797	0.7%	7,839	3.05%
State (Oklahoma)	3,997,343	67,834	1.74%	74,535	1.87%
United States	330,591,441	9,956,278	3.11%	11,172,877	3.38%

### Historic and Projected Population by County (2015-2020-2025)

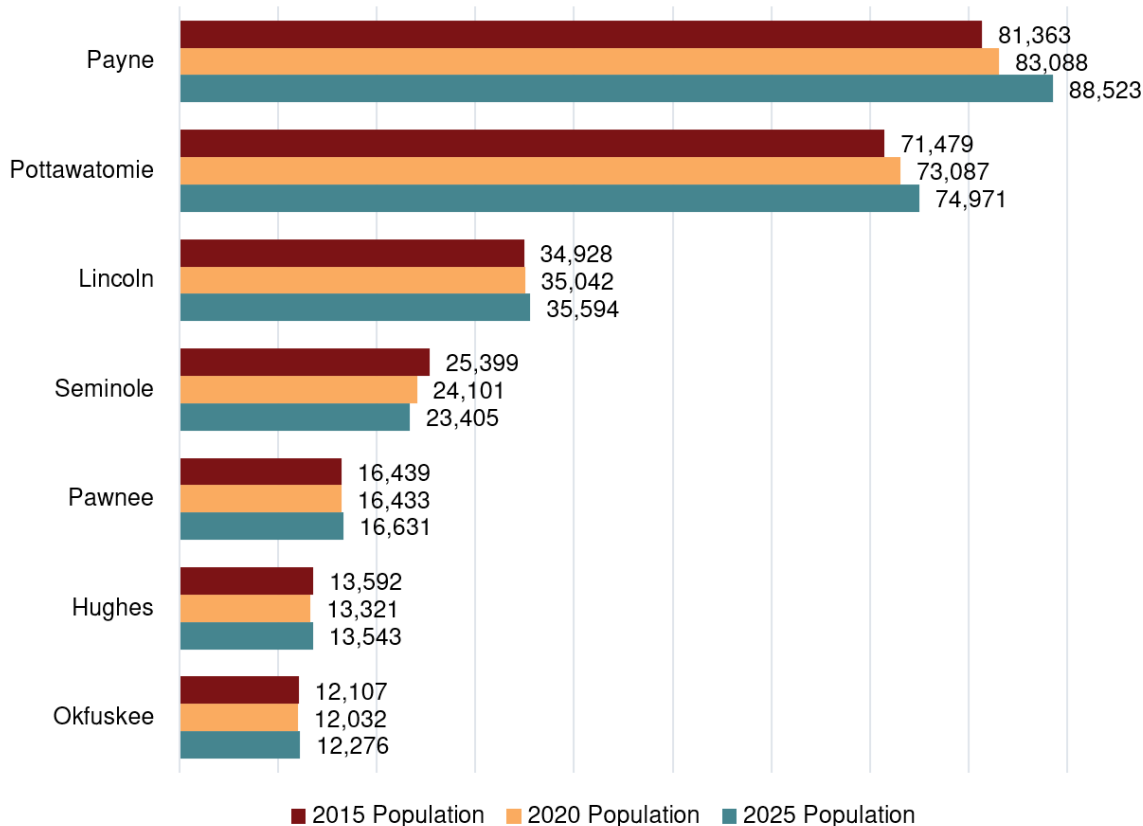


Figure 4: Population by County, US Census Bureau, 2019 ACS 5-Year Estimates

## Labor Force

The COEDD Region's 2020 labor force consists of 113,132 people. The labor force has been slowly declining since 2016, consistent with national trends. That said, employment has remained relatively steady before dipping dramatically in 2020 due to the COVID-19 pandemic. The slow decline in labor force could be contributed to many factors, including an aging population.

### Labor Force and Employed in COEDD Region (2010-2021 Annual Averages)

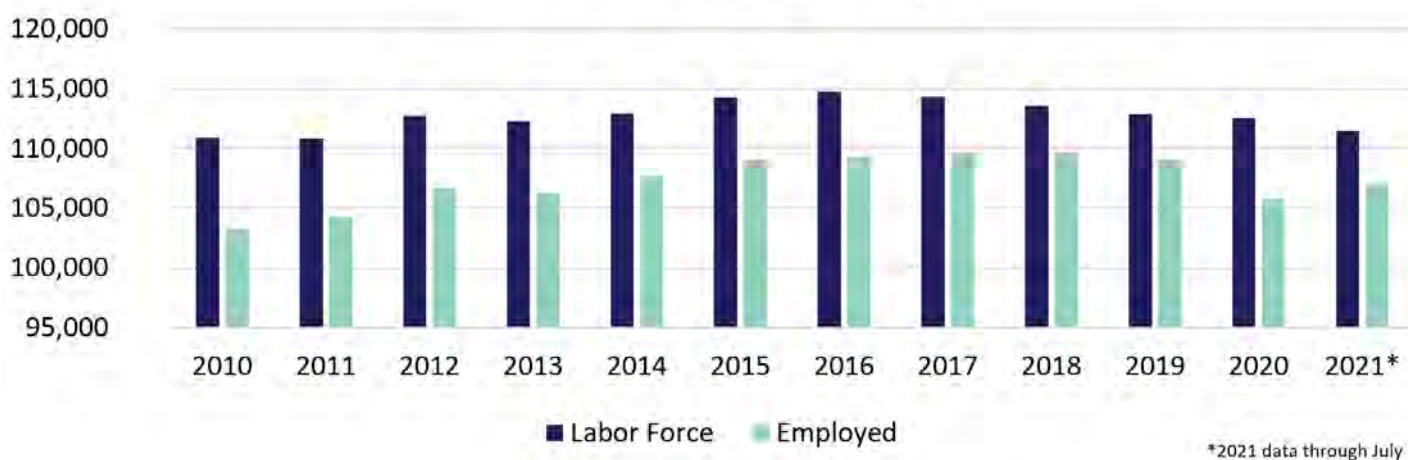
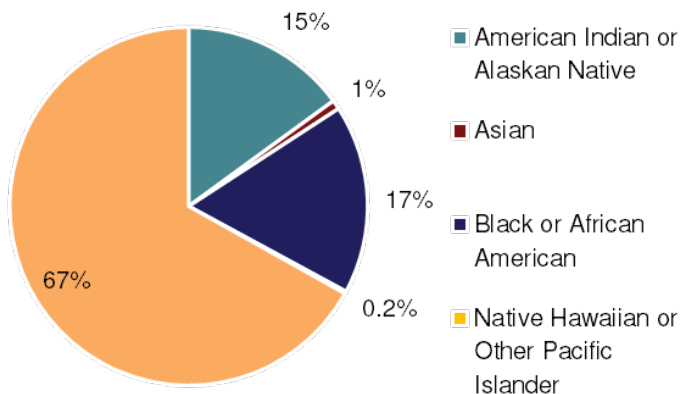


Figure 5: Labor Force and Employment, US Bureau of Labor Statistics

### Percentage of Unemployed (May 2021)



Race	Unemployment (May 2021)
American Indian or Alaskan Native	604
Asian	33
Black or African American	688
Native Hawaiian or Other Pacific Islander	8
White	2,697
<b>Total</b>	<b>4,031</b>

Figure 6: Unemployment by Race, Emsi 2021.2



## Unemployment

Unemployment in the COEDD Region has closely followed the state trendline in the last 5 years. Both the COEDD Region and the state were not as heavily impacted by the COVID-19 Pandemic in terms of unemployment, as both areas had roughly 2% lower unemployment in 2020 than the national average. Additionally, the region has steadily recovered from the pandemic as rates are now back to pre-pandemic levels. Both the region and state have recovered quicker than the nation in terms of unemployment, as unemployment is still much higher in the country now than it was before COVID-19.

While only accounting for 4% of the population, Black or African Americans are unproportionally unemployed with 17% of the overall total unemployed workers. That said, those who identify as white make up much of the overall percentage of unemployed people at 67%.

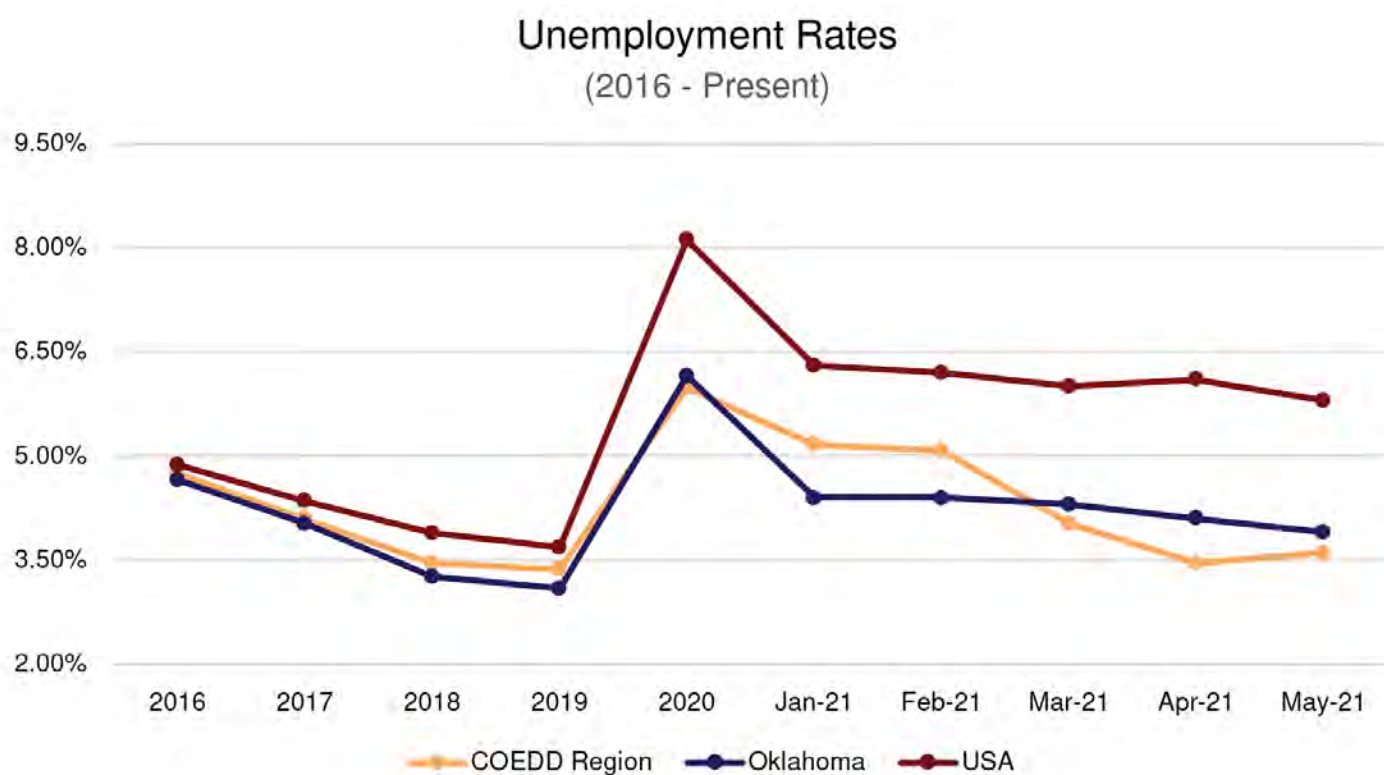


Figure 7: Unemployment Percentages, US Bureau of Labor Statistics

### Regional Poverty and Income

The COEDD Region has a 4% higher poverty rate than the state of Oklahoma, while also having roughly \$10,000 less Median Household Income (MHI) and \$7,000 less per capita income. Payne County has the highest poverty rate in the region at 26%, while Lincoln County has the lowest at 14%. Pottawatomie County has the highest MHI and Per Capita Income in the region, while Okfuskee County has the lowest in both categories.

Table 2: Poverty and Income, US Census Bureau, 2019 5-Year ACS Estimates

Area	Poverty Rate	Median Household Income	Per Capita Income
Payne County	26.0%	\$41,272	\$22,405
Pawnee County	23.3%	\$48,009	\$24,303
Hughes County	20.7%	\$39,365	\$20,572
Seminole County	20.4%	\$39,373	\$20,666
Okfuskee County	15.9%	\$38,411	\$18,437
Pottawatomie County	14.1%	\$53,511	\$26,207
Lincoln County	13.9%	\$50,671	\$25,255
<b>COEDD Region</b>	<b>19.2%</b>	<b>\$44,373</b>	<b>\$22,549</b>
<b>Oklahoma</b>	<b>15.2%</b>	<b>\$54,449</b>	<b>\$29,666</b>

While having the third lowest county poverty rate, Okfuskee County has the highest poverty rate for children that are under 18. Hughes County has the second highest rate of all counties in the region, followed by Seminole. The percent of children under 18 who are considered in poverty for each county is considerably higher than the total poverty rates for each county.

### % Children Under 18 Poverty Level in COEDD Region

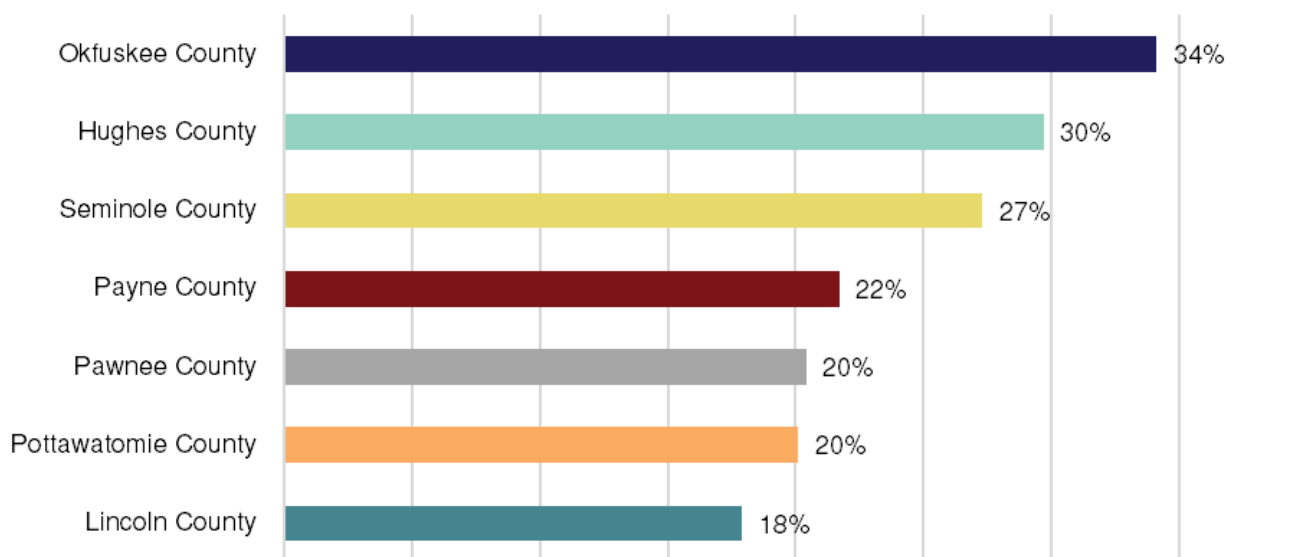


Figure 8: Child Poverty Percentages, US Census Bureau, 2019 5-Year ACS Estimates

## Educational Attainment

In the COEDD Region, 88.4% of people have attained at least a high school diploma. This is slightly above both the State and National average. That said, the region lags behind both the state and national average for population attaining an Associate's, Bachelor's, and Graduate Degree or Higher. The COEDD region's education attainment numbers run closely with state averages. The largest gap in attainment for the region is Bachelor's Degrees, where the state attainment average is 3% higher than the regions.

The population in the region has become more educated in the last 20 years, as each education level above High School Diploma saw increases in terms of percent of population. Specifically, Some College (2% increase), Associate Degree (3% increase), Bachelor's Degree (3% increase), and Graduate Degree or Higher (1% increase) all are education levels in 2020 that have higher percent of population attainment than in 2001.

## Educational Attainment

(Year 2020 - % of Population)

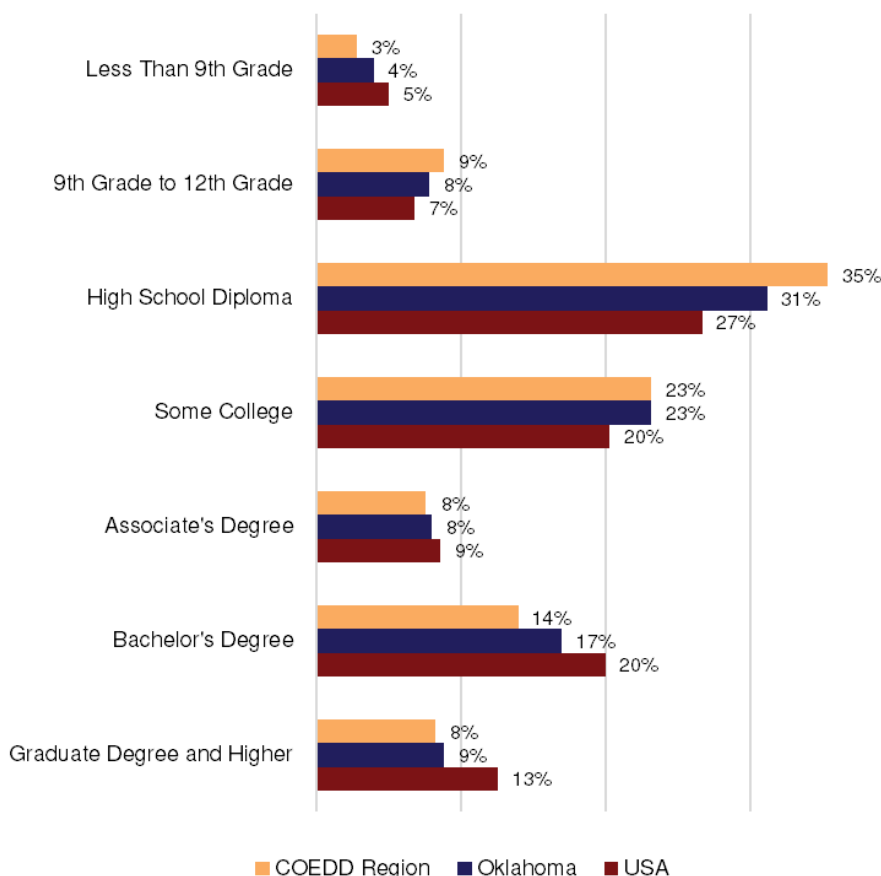


Figure 9: Educational Attainment, US Census Bureau, 2019 5-Year ACS Estimates

## Education Level in COEDD Region

(2001 vs. 2020)

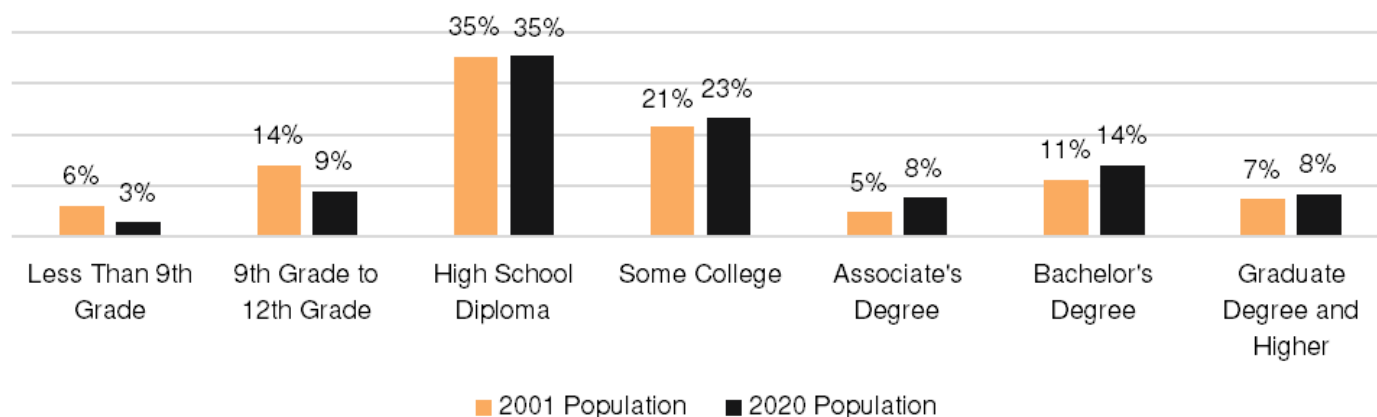


Figure 10: Educational Attainment Year Comparison, Emsi 2021.2



## Race and Ethnicity

Most residents within the COEDD Region (73%) are White. That said, the region is expected to become more diverse in the coming years with the increase in population of many different races. American Indian or Alaskan Native is the second largest race represented and is projected see an increase of roughly 1,200 people in the next five years. The Two or More Races subset is projected to see the largest increase of 2,160 people over this same time span. Overall, each minority race/ethnicity is projected to see a larger increase in people over the next five years, than they had seen in the previous five.

Table 3: Race and Ethnicity Data, Emsi 2021.2

Race/Ethnicity	2020 Population	% Of Cohort	Change (2015-2020)		Projected Change (2020-2025)	
White	187,557	72.95%	(1,672)	(0.88%)	1,883	1.00%
American Indian or Alaskan Native	27,401	10.66%	571	2.13%	1,215	4.43%
Black	8,661	3.37%	88	1.03%	377	4.35%
Asian	4,710	1.83%	(13)	(0.27%)	608	12.90%
Native Hawaiian or Pacific Islander	267	0.10%	65	32.18%	156	58.52%
Hispanic	8,801	3.42%	871	0%	1,439	16.36%
Two or More Races	19,706	7.66%	1,886	10.58%	2,160	10.96%
<b>Total</b>	<b>257,104</b>	<b>100.00%</b>	<b>1,797</b>	<b>0.70%</b>	<b>7,839</b>	<b>3.05%</b>

2020 COEDD Region Population by Race/Ethnicity

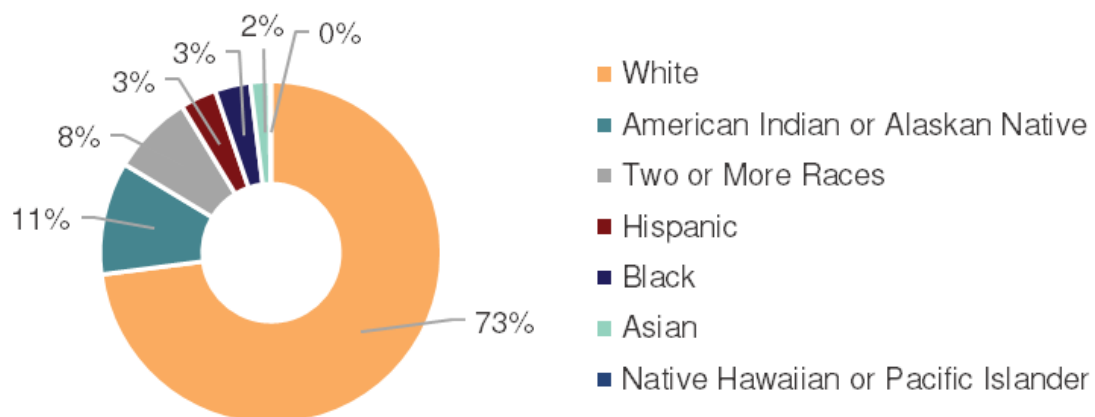


Figure 11: Race and Ethnicity Data, 2021.2

## Commuting

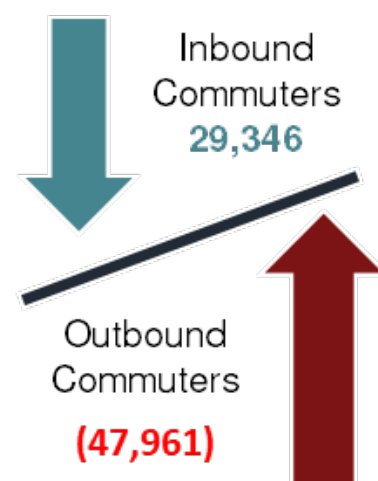
Commuting patterns in the COEDD Region indicate that the region has several more outbound commuter workers than inbound commuters. The close proximity to both large metropolitan areas of Oklahoma City and Tulsa, is a major underlying factor for outbound commuting. From the years 2015-2019, both inbound and outbound commuters were slowly increasing, with outbound commuters increasing at a higher rate. However, for the year 2020, both inbound and outbound commuters dropped significantly. The decrease in commuters for 2020 could be in part explained by many employers using new work-from-home (WFH) and remote working tactics, as the COVID-19 pandemic has caused employers around the entire country to rethink what the typical workplace looks like.

Table 4: Commuting Patterns, Emsi 2021.2

Year	Inbound	Outbound	Net
2015	29,105	46,568	(17,464)
2016	29,198	46,181	(16,983)
2017	29,889	47,418	(17,520)
2018	29,889	48,702	(18,814)
2019	30,256	49,427	(19,171)
2020	29,346	47,961	(18,615)

## Migration

Migration is a crucial part of any community and its economy. As people come and go, what resources and attributes flow in and out of the region can change the future and outlook of the area. As for net migration, smaller counties around the region have brought in more people than they have received, while counties for net negative migration are larger counties with major cities near the COEDD region.



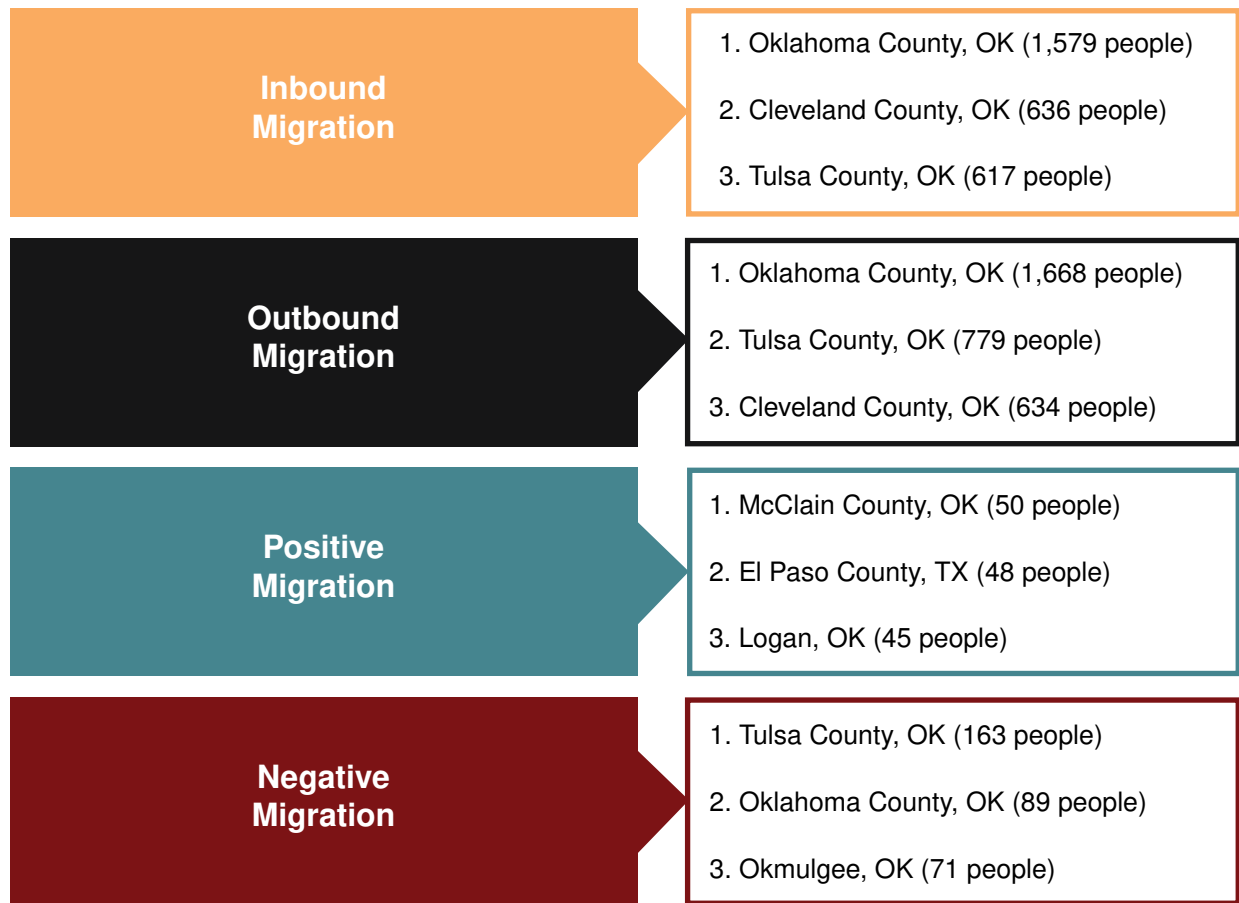


Figure 12: Migration Patterns, Emsi 2021.2

### 5-Year Migration Data for COEDD Region

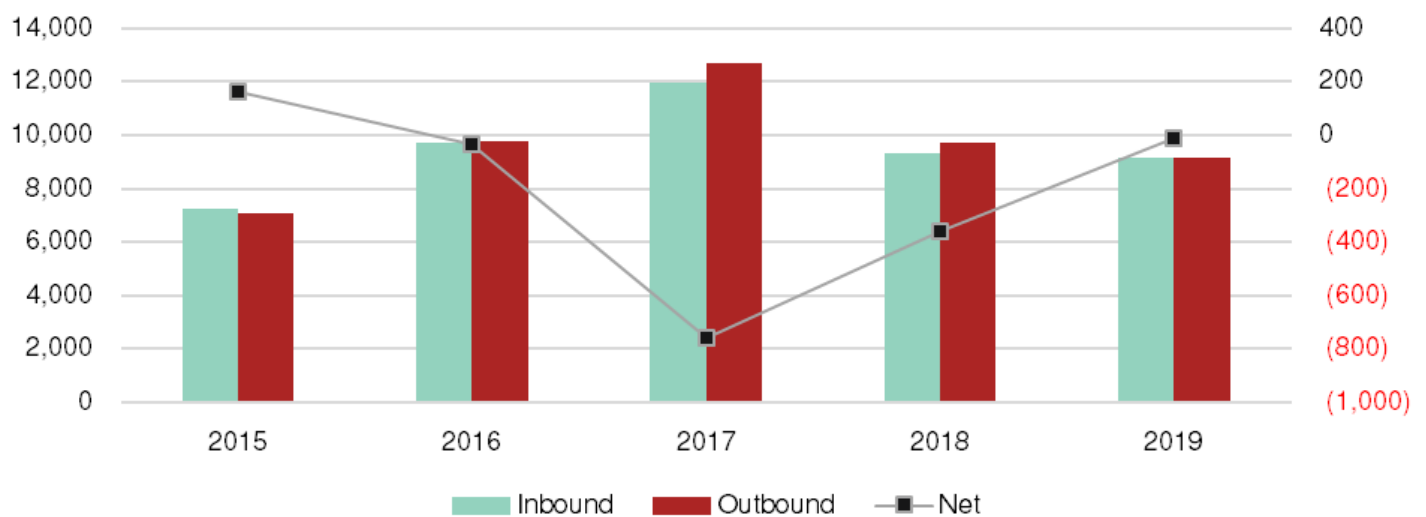


Figure 13: 5-Year Migration Patterns, Emsi 2021.2



## Community Indicators

Community indicators for the entire COEDD region include Millennial Population, Retirement Risk, Racial Diversity, Veteran Population, and Violent/Property Crime statistics. As seen, millennial representation in the region is just below the national average, as 47,524 millennials (ages 25-39) live in the area, compared to the national average of 52,610 for an area of COEDD's size. Retirement risk is also about average in the region. The national average for an area of COEDD's size is 75,020 people 55 or older, compared to 72,524 that live in the region. Racial diversity on the other hand, is low in the region, as the national average for an area of COEDD's size is 101,779 racially diverse people, while there are 68,225, more than 30,000 people less in the region.

Veterans are well represented in the region, as 16,358 veterans are in the area, higher than the national average of 14,171. Finally, violent crime in COEDD is lower than the national average of 3.53 violent crimes per 1,000 people, while property crime at 23.48 is higher than the national average of 19.79 property crimes per 1,000 people.

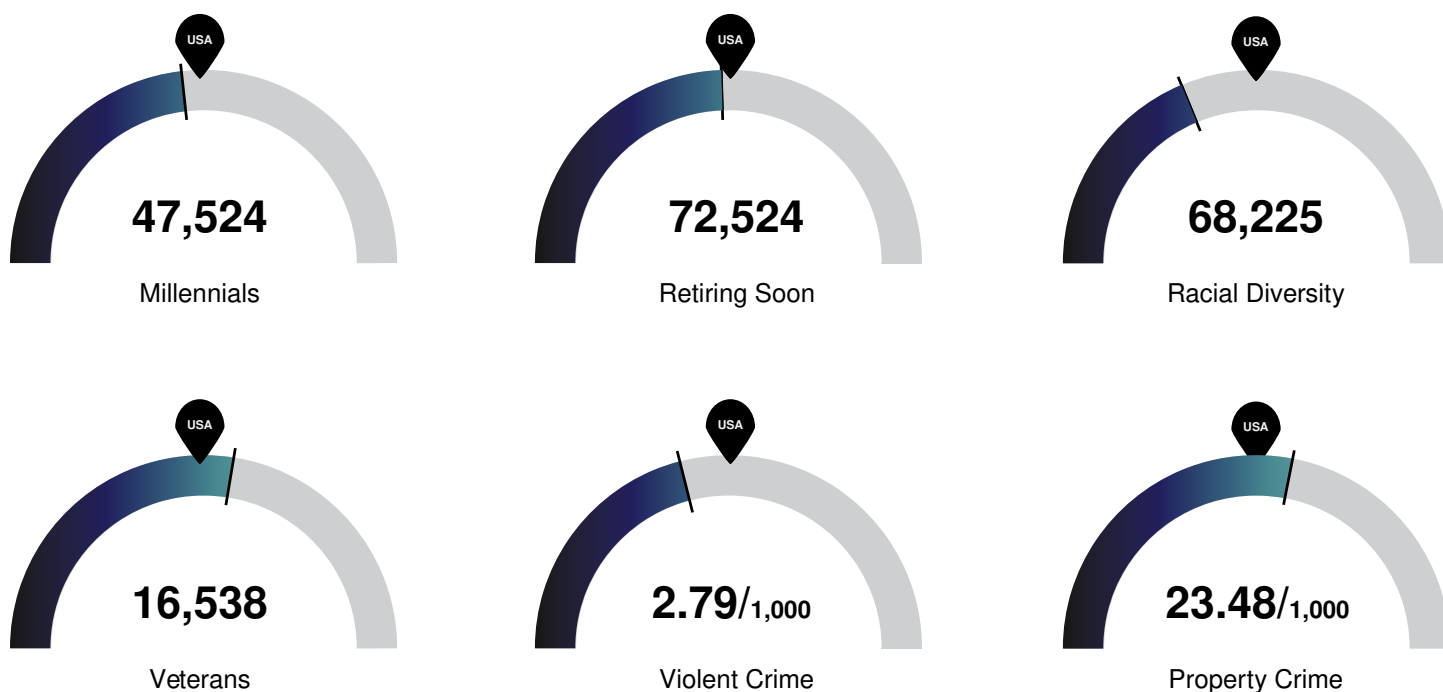


Figure 14: Community Indicators, Emsi 2021.2

## Industry Overview

In the COEDD Region, the Government industry is by far the largest industry in the region, as almost 30,000 jobs fall within this sector. The Retail Trade, Accommodation and Food Services, and Health Care and Social Assistance are the next highest industries in terms of 2020 jobs. The Utilities sector has the highest annual earnings in the region at nearly \$80,000. The Transportation and Warehousing sector, as well as the Mining Quarrying, and Oil and Gas Extraction sector, have the next two highest average annual earnings with both around \$60,000. Location Quotient (LQ) is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. As seen, the Mining, Quarrying, and Oil and Gas Extraction Industry Sector jobs are highly concentrated in the region. Other sectors with higher concentrations include Government, Utilities, Accommodation and Food Services, and Retail Trade.

### Top Industries by total 2020 Jobs

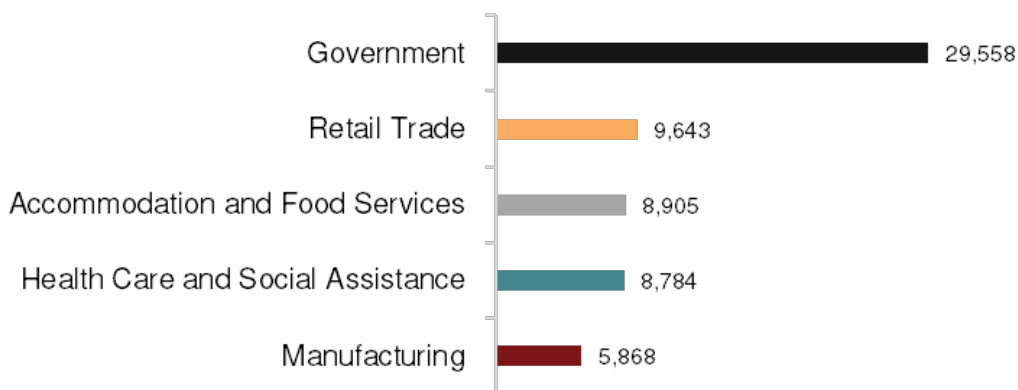


Figure 15: Top Industry Jobs, Emsi 2021.2

### Top industries by 2020 Avg. Annual Earnings

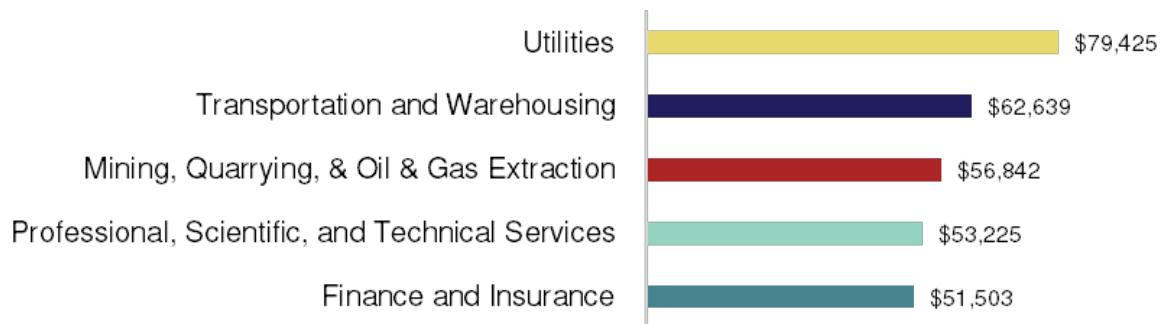


Figure 16: Top Industry Earnings, Emsi 2021.2

## Top Industries by Location Quotient

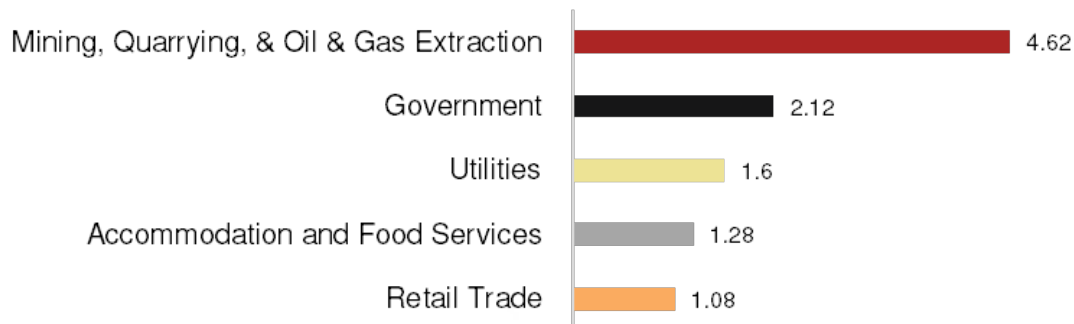


Figure 17: Top Industry Location Quotient, Emsi 2021.2

### Occupation Overview

Five of the top occupations in the region had more than 5,600 jobs in 2020, with the top two occupations having more than 10,000 jobs each. The top five occupations include Office and Administrative Support Occupations (11,492), Food Preparation and Serving Related Occupations (10,328), Educational Instruction and Library Occupations (8,725), Sales and Related Occupations (8,314), and Healthcare Practitioners and Technical Operations (5,606).

## Top Occupations by total 2020 Jobs

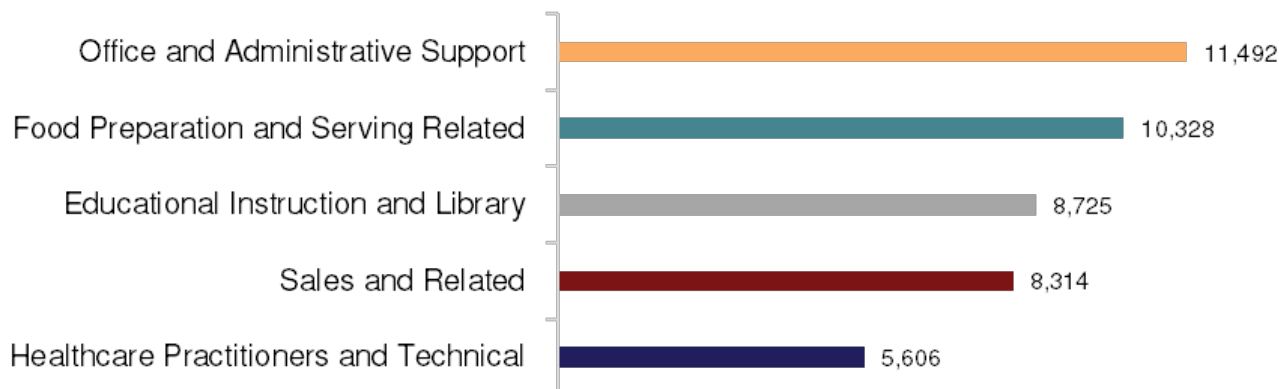


Figure 18: Top Occupation Jobs, Emsi 2021.2

Of the 500 occupations examined in the region, 42% required a high school diploma or equivalent, 31% required a bachelor's degree or higher, and 14% of occupations required no education at all. Additionally, roughly 40% of occupations do not require any on-the-job (OTJ) training, while 57% of jobs require some sort of short-term/moderate/long-term OTJ training. Only 3% of jobs required an internship/residency and just 2% of jobs required apprenticeships.

### Top 500 Occupations Typical Entry Level Education

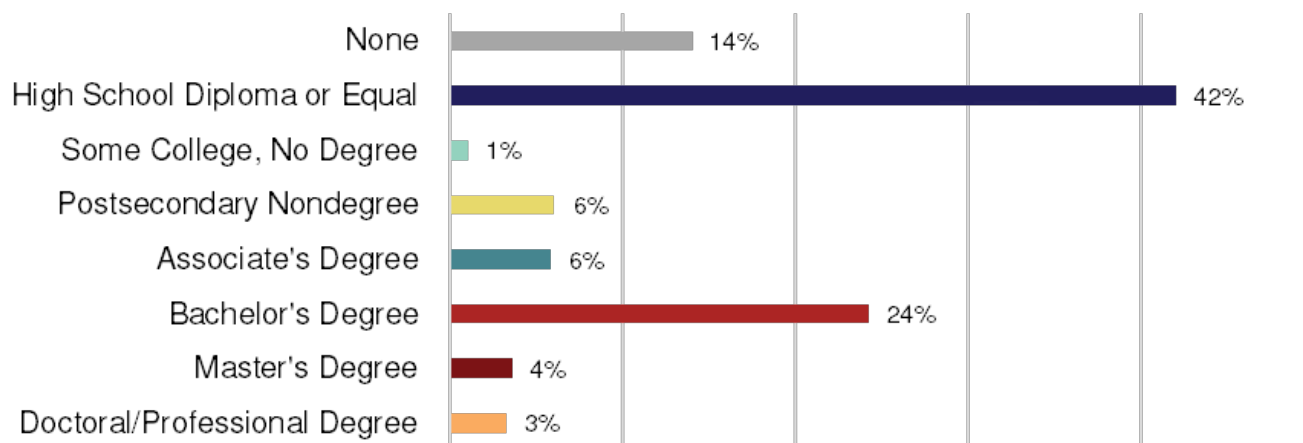


Figure 19: Top Occupation Education Characteristics, Emsi 2021.2

### Top 500 Occupations Typical On-The-Job-Training

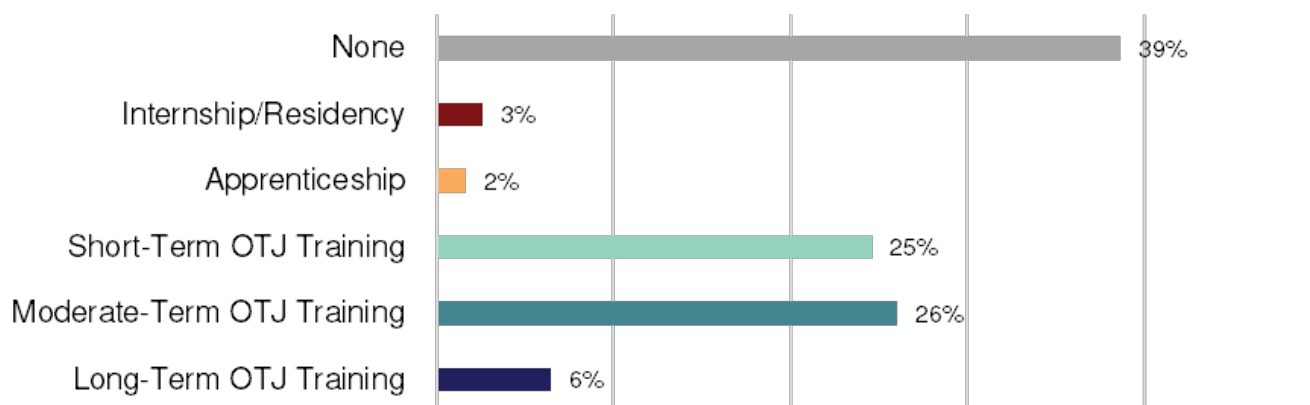


Figure 20: Top Occupation OTJ Training Characteristics, Emsi 2021.2



## Target Sectors

The COEDD Region has a diverse economy with significant concentrations in a few key industries. In the region, the primary drivers are an impressive supply of a well-educated workforce and a strong partnership between education, government and industry.

Along with community stakeholder input and quantitative data analysis, three industries were chosen that deserved special attention as they are critical for the future economic success of the region. These industries include:



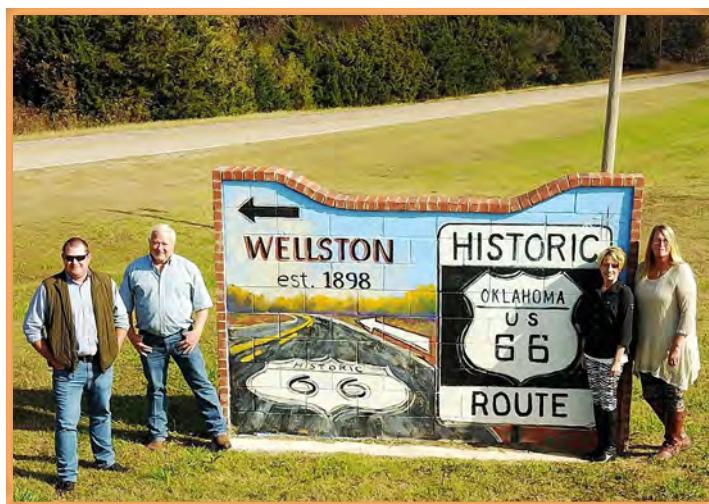
Oil & Gas



Retail Trade



Tourism



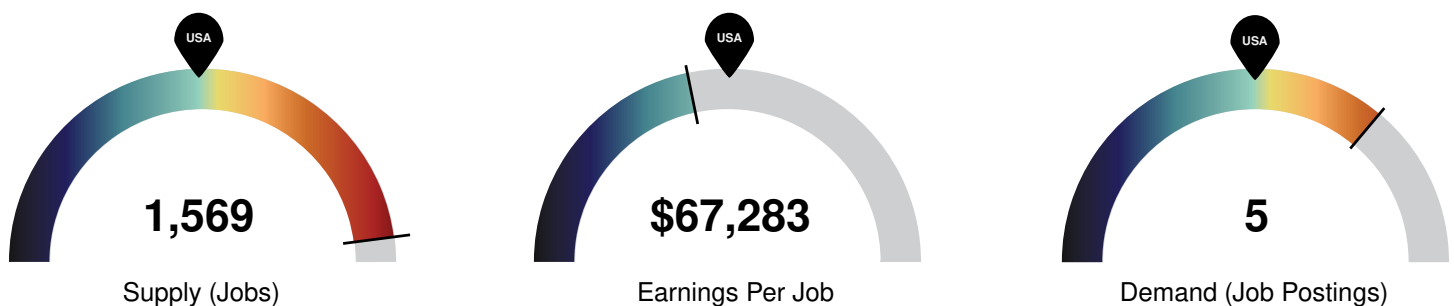




## Target Sector: Oil & Gas

The region is in high supply of jobs for this specific industry when compared to a national scale\*, employing over 1,500 people. The COEDD region employs roughly 1,200 more people in the Mining, Quarrying, and Oil and Gas Industry than a typical region of its size. Earnings per jobs is determined by using the total industry earnings divided by the number of jobs in the industry. That said, the earnings per job for this industry are well below the national average. The average salary for a job in this industry in the COEDD region is \$67,283, roughly \$60,000 less than the national average of \$129,710. Demand for the industry is defined by the total amount of job postings in the region. There are 5 job postings a month, 2 higher than the national average of 3 per month. With the high supply of jobs in the region, it should be expected that job postings in the region outpace the national average.

### Aggressive Hiring Competition Over a Deep Supply of Regional Talent



\*National average values are derived by taking the national value for Mining, Quarrying, and Oil and Gas Extraction and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region.

Figure 21: Oil and Gas Industry Characteristics, Emsi 2021.2

## Oil & Gas Industry Breakdown

The Mining, Quarrying, and Oil and Gas Extraction industry has seen a deep decline in jobs the past five years and is projected for further decreases. In the last five years, 985 jobs were lost, indicating a 39% overall decline in jobs for the region. In the next five years, jobs are projected to decline by 293, indicating a 19% decline. That said, while jobs declined over the past five years, the COVID-19 pandemic had a significant impact on the outlook for the industry. From 2016-2019, jobs were slowly increasing but still not back to 2015 levels, short 191 jobs. From 2019 to 2020, 794 jobs were lost (a 34% decrease of jobs for the entire industry). This drop for the Mining, Quarrying, and Oil and Gas industry was the largest decline in jobs out of any industry from 2019-2020 in the region. Overall, while the region, state, and nation saw declines in jobs for this industry, the COVID-19 pandemic inflated the apparent decline as 80% of all jobs lost in the past five years happened over the 2019-2020 timeframe. Additionally, average earnings for jobs in the industry varied between counties, ranging from approximately \$56,000-\$78,000. Location Quotient's (LQ) were significantly high for each county and the entire region, with Seminole County having the highest LQ of 12.44 and an overall region average of 7.02.

Table 5: Regional Industry Job Numbers, Emsi 2021.2

Region	2020 Jobs	Change (2015-2020)		Change (2020-2025)		Average Earnings	Payrolled Business Locations	LQ
Payne County	472	(460)	(49%)	(143)	(30%)	\$70,056	65	3.25
Seminole County	368	(140)	(28%)	(145)	(39%)	\$69,873	43	12.44
Lincoln County	227	(34)	(13%)	12	5%	\$58,030	23	7.37
Pottawatomie County	185	(223)	(55%)	(10)	(6%)	\$77,787	31	1.96
Pawnee County	137	(24)	(15%)	(15)	(11%)	\$56,165	23	9.23
Hughes County	98	(128)	(57%)	(36)	(37%)	\$57,590	14	7.15
Okfuskee County	82	25	44%	44	54%	\$71,826	8	7.75
<b>Total</b>	<b>1,569</b>	<b>(985)</b>	<b>(39%)</b>	<b>(293)</b>	<b>(19%)</b>	<b>\$65,904</b>	<b>207</b>	<b>7.02</b>



Target Sector: Oil & Gas

## Oil & Gas Unemployment

After peaking in early 2015, unemployment has been steadily declining and has remained relatively low for the industry. In 2019 unemployment began to slowly rise until April 2020 and has consistently declined since then. Each county followed a similar unemployment trendline and current have less unemployed workers than in January 2020.

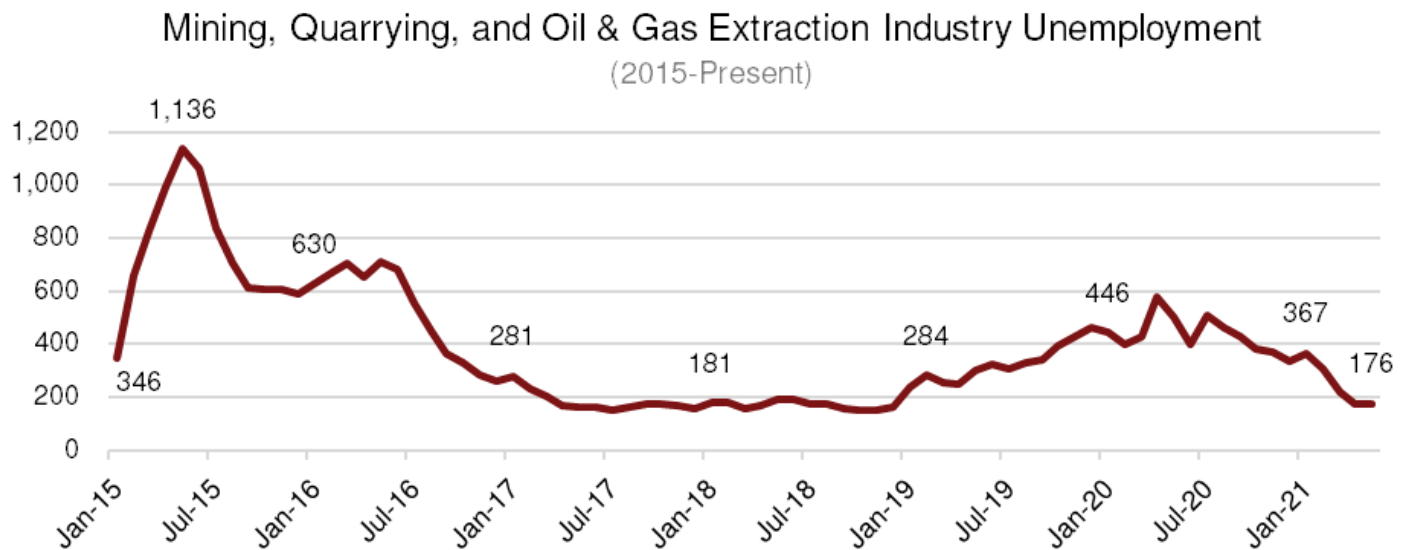


Figure 22: Oil and Gas Industry Unemployment, Emsi 2021.2

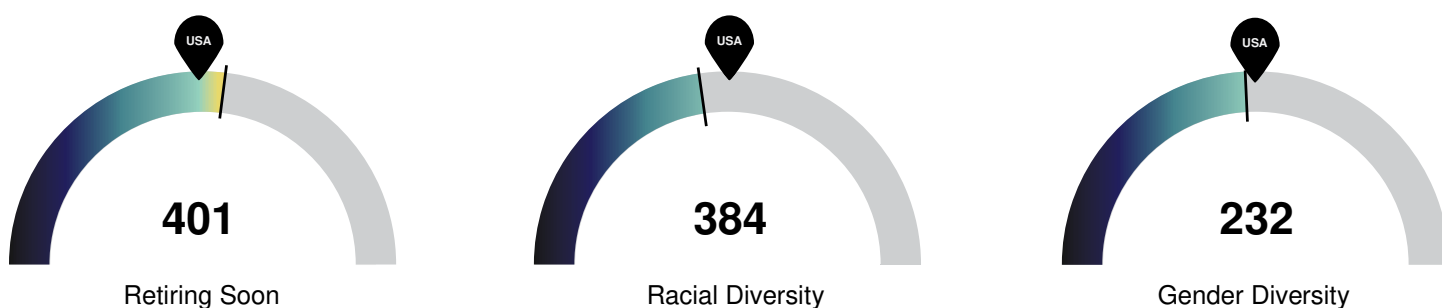


Target Sector: Oil & Gas

## Oil & Gas Workforce Characteristics

Workforce characteristics of the industry include retirement risk, racial diversity, and gender diversity. Retirement risk is high in the COEDD region for the Mining, Quarrying, and Oil and Gas Industry. The national average for employees who are 55 or older for an area of the COEDD regions size is 354 employees, while the COEDD region is above this number with 401 employees. The high supply of jobs in the region could impact these numbers. Additionally, racial diversity is low in the area compared to the national average. For an area of COEDD's size, the national average is 448 racially diverse employees, compared to the 384 that are current in the industry. Finally, gender diversity is about average within the region, as 232 female employees work within the industry in the COEDD region compared to the national average of 242.

### Retirement Risk is High, While Overall Diversity is About Average



\*National average values are derived by taking the national value for Mining, Quarrying, and Oil and Gas Extraction and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region.

Figure 23: Oil and Gas Industry Characteristics, Emsi 2021.2



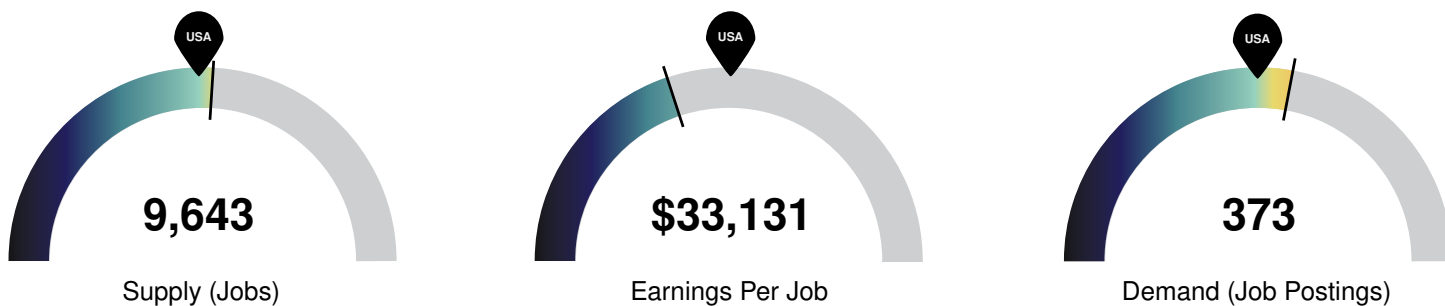
Target Sector: Oil & Gas



## Target Sector: Retail Trade

The Retail Trade industry in the region has about average supply of jobs when compared to a national scale\*, employing 9,643 people. The COEDD region employs roughly 700 people less in the Retail Trade industry than a typical region of its size. Earnings per jobs is determined by using the total industry earnings divided by the number of jobs in the industry. That said, the earnings per job for this industry are below the national average. The average salary for a job in this industry in the COEDD region is \$33,131, roughly \$9,000 less than the national average of \$42,413. Demand is high for this industry in the region, as it is defined by the total amount of job postings in the region. There are 373 job postings a month, about 60 higher than the national average of 311 per month.

### Aggressive Hiring Competition Over an Average Supply of Regional Talent



\*National average values are derived by taking the national value for Retail Trade and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region. In other words, the values represent the national average adjusted for region size.

Figure 24: Retail Trade Industry Characteristics, Emsi 2021.2



## Retail Trade Industry Breakdown

The Retail Trade industry saw deep decline in jobs over the past five years. That said, the industry looks to rebound in the next five years with all but one county having positive projected growth. In the last five years, 553 jobs were lost, indicating a 5% overall decline in jobs for the region. While 553 jobs were lost in the last five years, 30% of this total were lost over 2019-2020 during the COVID-19 pandemic. In the next five years, jobs are projected to increase by 213, indicating a 2% increase. Every county in the region other than Lincoln saw declines in jobs the last five years, with Payne County seeing the largest decrease in jobs (293), and Hughes County seeing the largest percent change (-16%). Average earnings for jobs in the industry varied between counties, ranging from approximately \$29,000-\$40,000. Location Quotient's (LQ) were consistently high for each county and the entire region, with Lincoln County having the highest LQ of 1.17 and an overall region average of 1.05.

Table 6: Retail Trade Industry Jobs, Emsi 2021.2

Region	2020 Jobs	Change (2015-2020)		Change (2020-2025)		Average Earnings	Payrolled Business Locations	LQ
Payne County	4,120	(293)	(7%)	81	2%	\$32,476	289	1.07
Pottawatomie County	2,741	(69)	(2%)	8	0%	\$32,712	228	1.10
Lincoln County	949	54	6%	111	12%	\$36,237	89	1.17
Seminole County	790	(139)	(15%)	(17)	(2%)	\$34,466	63	1.01
Pawnee County	431	(33)	(7%)	17	4%	\$39,935	38	1.10
Hughes County	365	(69)	(16%)	1	0%	\$27,659	40	1.01
Okfuskee	246	(4)	(2%)	12	5%	\$28,716	31	0.88
<b>Total</b>	<b>9,643</b>	<b>(553)</b>	<b>(5%)</b>	<b>213</b>	<b>2%</b>	<b>\$33,171</b>	<b>777</b>	<b>1.05</b>



Target Sector: Retail Trade

## Retail Trade Unemployment

The Retail Trade industry was undoubtedly impacted by the COVID-19 pandemic. After remaining relatively steady from 2015-2019, unemployment drastically spiked in April of 2020. After hitting nearly 1,800 unemployed workers (an increase of 1,336 workers from March 2020 to April 2020), unemployment began to decrease and has continued to decrease until today where it is close to pre-pandemic numbers.

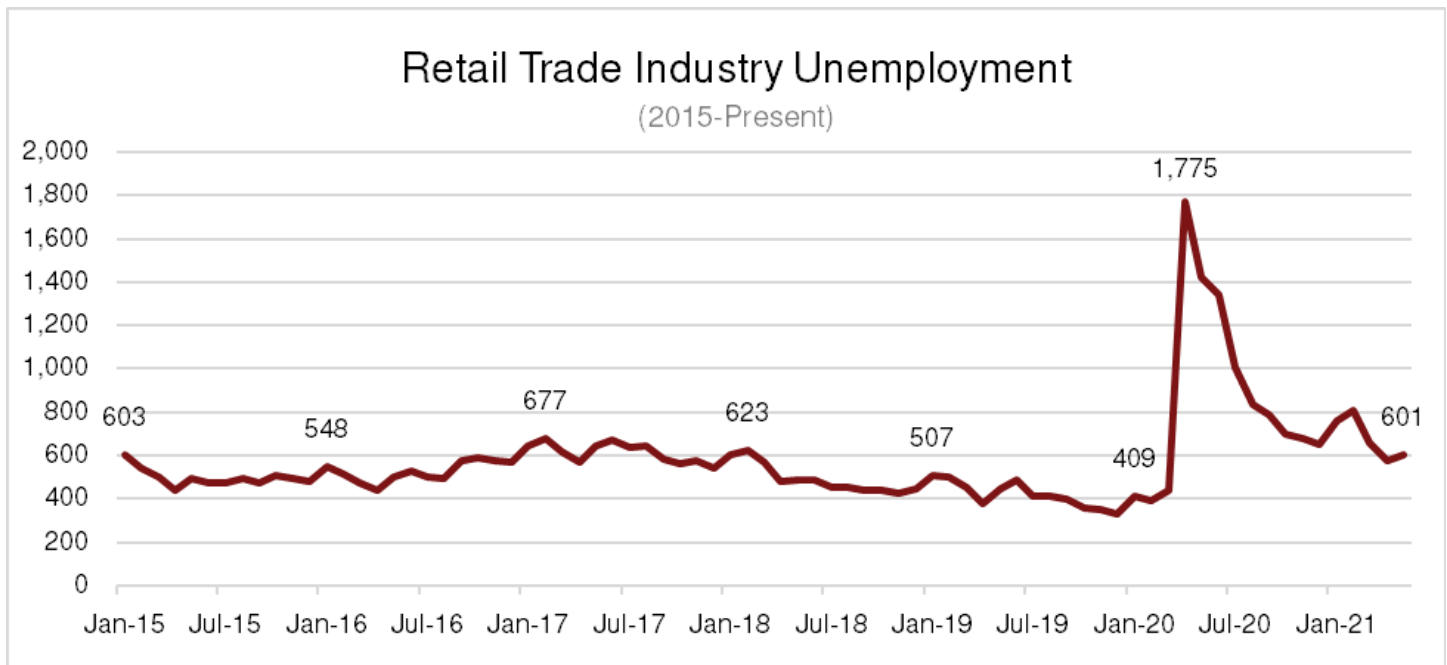


Figure 25: Retail Trade Industry Unemployment, Emsi 2021.2

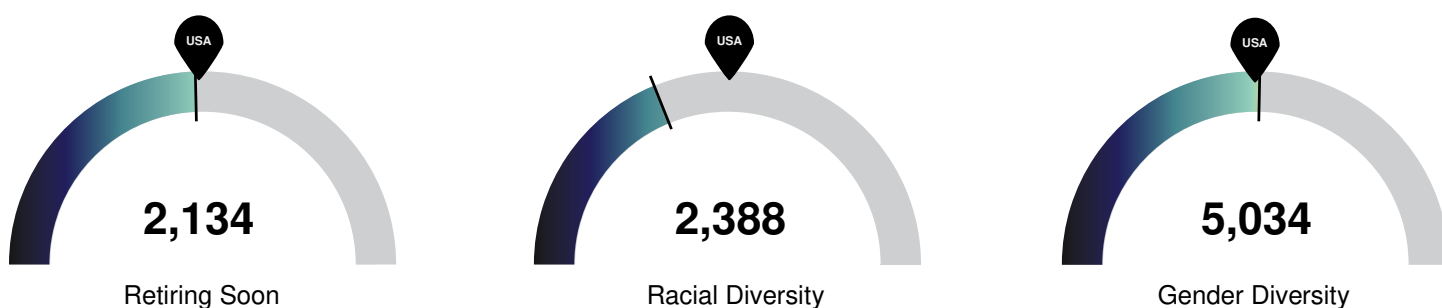


Target Sector: Retail Trade

## Retail Trade Workforce Characteristics

Industry workforce characteristics include retirement risk, racial diversity, and gender diversity. Retirement risk is low in the COEDD region for the Retail Trade industry. The national average for employees who are 55 or older for a region of COEDD's size is 179 people, while the COEDD region is below this number with 147 people. Additionally, racial diversity is low in the area compared to the national average. For an area of COEDD's size, the national average is 229 racially diverse employees, compared to 146 people that are current in the industry. Finally, gender diversity is about average within the region, as 386 female employees work within the industry in the COEDD region compared to the national average of 3.

### Retirement Risk is About Average, While Overall Diversity is Low



\*National average values are derived by taking the national value for Retail Trade and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region. In other words, the values represent the national average adjusted for region size.

Figure 26: Retail Trade Industry Characteristics, Emsi 2021.2



Target Sector: Retail Trade



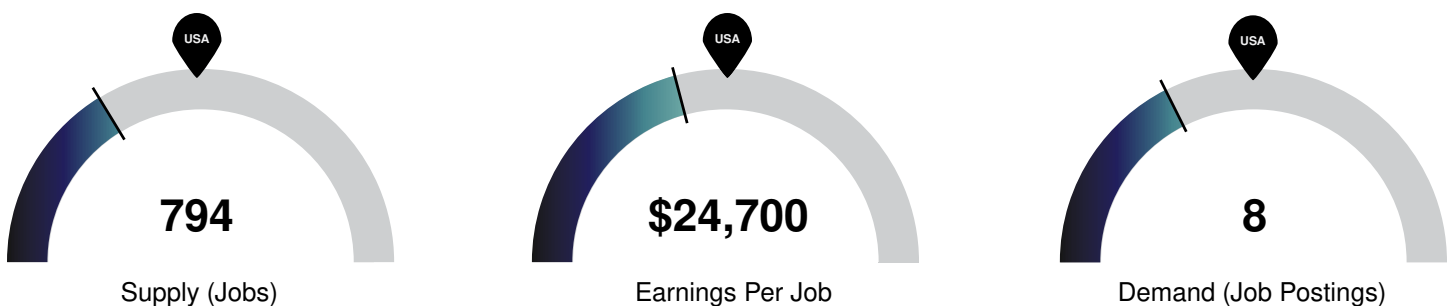
## Target Sector: Tourism

For this analysis of regional tourism, we examine the NAICS 2-digit Industry level for both Arts, Entertainment, & Recreation (page 30) as well as Accommodation & Food Services ([page 34](#)).

### Arts, Entertainment, & Recreation

The Arts, Entertainment, and Recreation industry has a low supply of jobs in the region when compared to a national scale\*, employing 794 people. The COEDD region employs roughly 600 people less in this industry than a typical region of its size. Earnings per jobs is determined by using the total industry earnings divided by the number of jobs in the industry. That said, the earnings per job for this industry are below the national average\*. The average salary for a job in this industry in the COEDD region is \$24,700 roughly \$25,000 less than the national average of \$49,438. Demand is low for this industry, as it is defined by the total amount of job postings in the region. There are 8 job postings a month in the COEDD region for this industry, 5 lower than the national average of 13 per month.

### Light Hiring Competition Over a Thin Supply of Regional Talent



\*National average values are derived by taking the national value for Arts, Entertainment, and Recreation and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region. In other words, the values represent the national average adjusted for region size.

Figure 27: Arts, Entertainment, and Recreation Industry Characteristics, Emsi 2021.2

## Arts, Entertainment, & Recreation Industry Breakdown

The Arts, Entertainment, and Recreation industry saw increases in jobs over the past five years for each county except for Seminole. Additionally, Okfuskee, Hughes, and Pawnee County had insufficient data to be displayed. That said, the industry looks to continue to grow in the next five years with all counties having positive growth in terms of numbers of jobs. In the last five years, 179 jobs were added to the industry, indicating a 37% overall increase in jobs for the region. In the next five years, jobs are projected to increase by 168, indicating a 21% increase. Average earnings for jobs in the industry varied between counties, ranging from approximately \$19,000-\$36,000. Location Quotient's (LQ) were consistently low for each county and the entire region, indicating the region is not highly concentrated with jobs for this industry.

Table 7: Arts, Entertainment, and Recreation Industry Jobs, Emsi 2021.2

Region	2020 Jobs	Change (2015-2020)		Change (2020-2025)		Average Earnings	Payrolled Business Locations	LQ
Payne County	425	66	18%	60	14%	\$24,835	29	0.72
Pottawatomie County	225	103	85%	81	36%	\$19,278	16	0.58
Lincoln County	43	10	29%	5	12%	\$35,814	3	0.34
Seminole County	36	(11)	(23%)	8	21%	\$32,020	5	0.30
Okfuskee County	28	Insf. Data	Insf. Data	1	5%	\$29,887	1	0.66
Hughes County	27	Insf. Data	Insf. Data	14	51%	\$34,419	2	0.48
Pawnee County	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	\$25,953	1	0.16
<b>Total</b>	<b>784</b>	<b>168</b>	<b>37%</b>	<b>168</b>	<b>21%</b>	<b>\$28,887</b>	<b>57</b>	<b>0.46</b>



Target Sector: Tourism



## Arts, Entertainment, & Recreation Unemployment

After remaining relatively steady from 2015-2019, unemployment drastically spiked in April of 2020 due to the COVID-19 pandemic. After hitting nearly 435 unemployed workers, unemployment began to decrease and has continued to decrease until today where it is close to pre-pandemic numbers. Payne County experienced the highest number of unemployed workers at the start of the pandemic, followed by Pottawatomie County. The two together both made up a majority of all unemployed workers (all other counties had insufficient unemployment data to show).

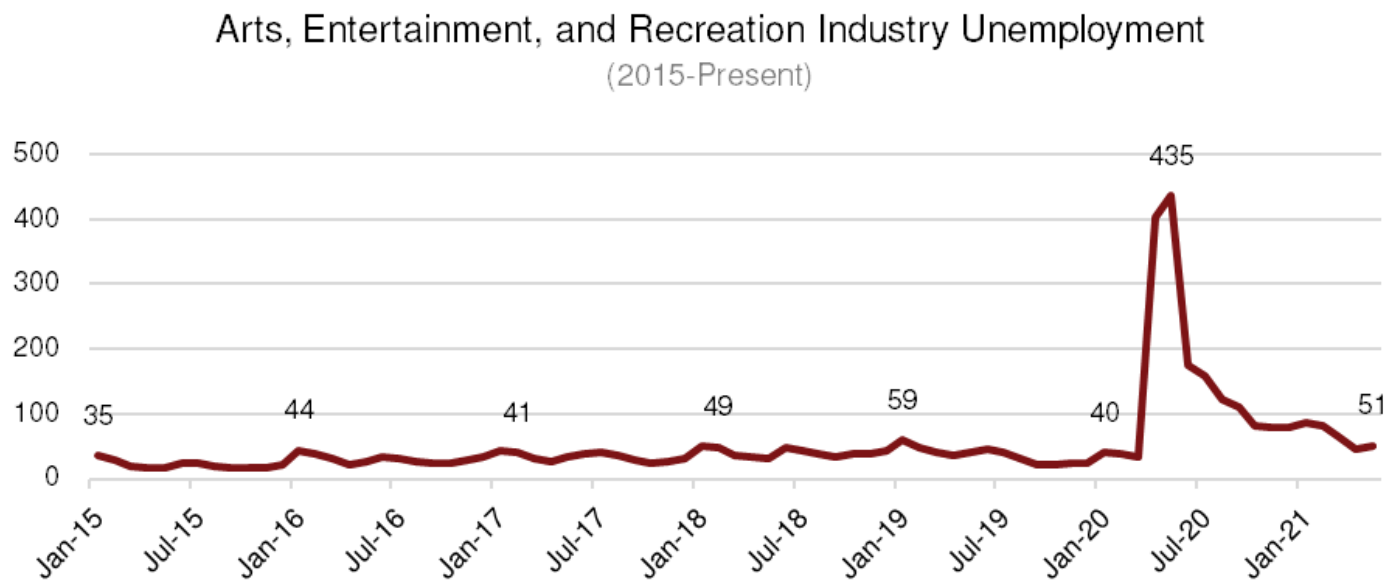


Figure 28: : Arts, Entertainment, and Recreation Industry Unemployment, Emsi 2021.2

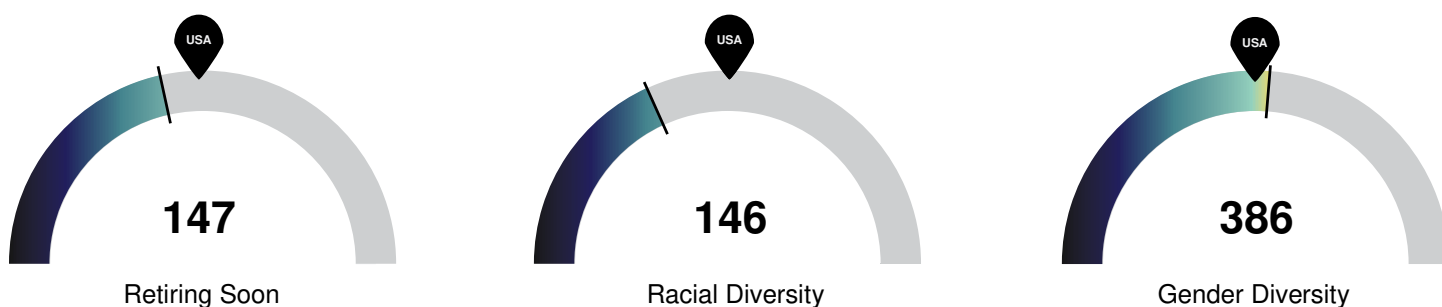


Target Sector: Tourism

## Arts, Entertainment, & Recreation Workforce Characteristics

Workforce characteristics for the industry include retirement risk, racial diversity, and gender diversity. Retirement risk is low in the COEDD region for the Arts, Entertainment, and Recreation industry. The national average for employees who are 55 or older for a region of COEDD's size is 179 people, while the COEDD region is below this number with 147 people. Additionally, racial diversity is low in the area compared to the national average. For an area of COEDD's size, the national average is 229 racially diverse employees, compared to 146 people that are current in the industry. Finally, gender diversity is about average within the region, as 386 female employees work within the industry in the COEDD region compared to the national average of 378.

### Retirement Risk is Low, While Overall Diversity is Low



\*National average values are derived by taking the national value for Arts, Entertainment, and Recreation and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region. In other words, the values represent the national average adjusted for region size.

Figure 29: : Arts, Entertainment, and Recreation Industry Characteristics, Emsi 2021.2



Target Sector: Tourism



## Target Sector: Tourism (continued)

For this analysis of regional tourism, we examine the NAICS 2-digit Industry level for both Arts, Entertainment, & Recreation (page 34) as well as Accommodation & Food Services ([page 30](#)).

### Accommodation and Food Services

The region is in high supply of jobs for the Accommodation and Food Services industry when compared to a national scale\*, employing 8,905 people. The COEDD region employs roughly 2,000 more people in this industry than a typical region of its size. Earnings per jobs is determined by using the total industry earnings divided by the number of jobs in the industry. That said, the earnings per job for this industry are below the national average\*. The average salary for a job in this industry in the COEDD region is \$17,831 roughly \$8,000 less than the national average of \$25,989. Finally, demand for this industry is high in the region, as it is defined by the total amount of job postings in the area. There are 185 job postings a month in the COEDD region for this industry, about 50 posts higher than the national average of 137 per month.

### Aggressive Hiring Competition Over a Deep Supply of Regional Talent



\*National average values are derived by taking the national value for Accommodation and Food Services and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region. In other words, the values represent the national average adjusted for region size.

Figure 30: Accommodation and Food Services Industry Characteristics, Emsi 2021.2



Target Sector: Tourism

## Accommodation and Food Services Industry Breakdown

The Accommodation and Food Services industry saw increases in jobs over the past five years for each county in the region. Additionally, the industry looks to continue to grow in the next five years with all counties having positive projected job growth. In the last five years, 336 jobs were added to the industry, indicating a 4% overall increase in jobs for the region. In the next five years, jobs are projected to increase by 967, indicating a 11% increase. Average earnings for jobs in the industry varied between counties, ranging from approximately \$15,000-\$18,000. Location Quotient's (LQ) were above 1.0 for Payne and Pottawatomie County, indicating these regions have a concentration of Accommodation and Food services jobs in their regions.

Table 8: Accommodation and Food Services Industry Jobs, Emsi 2021.2

Region	2020 Jobs	Change 2015-2020		Change 2020-2025		Average Earnings	Payrolled Business Locations	LQ
Payne County	4,439	49	1%	348	8%	\$17,820	199	1.49
Pottawatomie County	2,751	91	3%	392	14%	\$17,730	135	1.43
Lincoln County	579	70	14%	58	10%	\$15,408	43	0.92
Seminole County	481	23	5%	14	3%	\$16,796	27	0.80
Pawnee County	272	41	18%	59	22%	\$14,729	23	0.90
Hughes County	228	48	27%	56	25%	\$15,077	18	0.81
Okfuskee County	156	13	9%	38	25%	\$15,844	12	0.72
<b>Total</b>	<b>8,905</b>	<b>336</b>	<b>4%</b>	<b>967</b>	<b>11%</b>	<b>\$16,201</b>	<b>457</b>	<b>1.01</b>



Target Sector: Tourism

### Accommodation and Food Services Unemployment

After remaining relatively steady from 2015-2020, unemployment drastically spiked in April of 2020 due to the COVID-19 pandemic in the Accommodation and Food Services industry. After hitting nearly 2,875 unemployed workers, unemployment began to decrease and has continued to decrease until today where it is still considerably higher than pre-pandemic numbers. Payne County experienced the highest number of unemployed workers at the start of the pandemic, followed by Pottawatomie County. The two together both made up a majority of all unemployed workers.

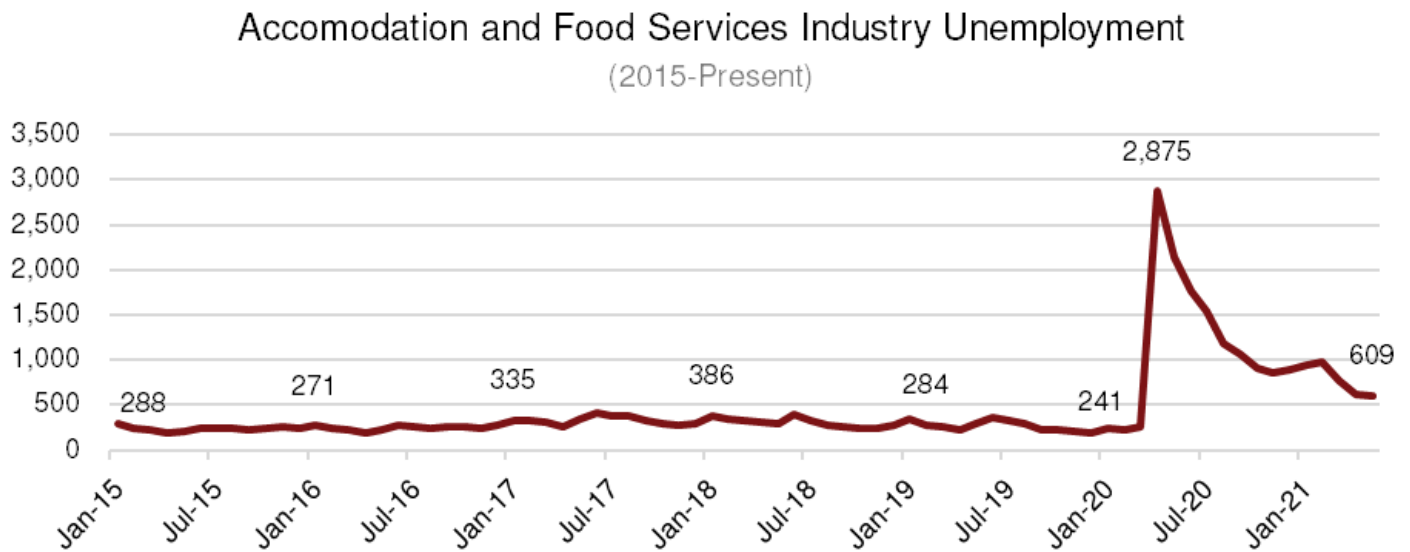


Figure 31: Accommodation and Food Services Industry Unemployment, Emsi 2021.2



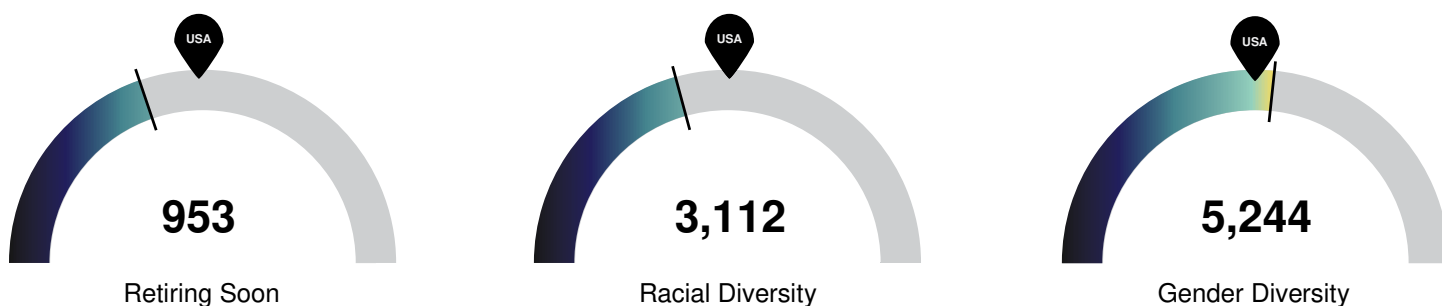
Target Sector: Tourism



## Accommodation and Food Services Workforce Characteristics

Workforce characteristics for the industry include retirement risk, racial diversity, and gender diversity. The national average for employees who are 55 or older for a region of COEDD's size is 1,281 people, while the COEDD region is below this number with 953 people. Additionally, racial diversity is low in the area compared to the national average. For an area of COEDD's size, the national average is 4,037 racially diverse employees, compared to 3,113 people that are current in the industry. Finally, gender diversity is above average within the region, as 5,224 female employees work within the industry in the COEDD region compared to the national average of 4,801.

### Retirement Risk Is Low, While Overall Diversity Is About Average



\*National average values are derived by taking the national value for Arts, Entertainment, and Recreation and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region. In other words, the values represent the national average adjusted for region size.

Figure 32: Accommodation and Food Services Industry Characteristics, Emsi 2021.2



Target Sector: Tourism

# ECONOMIC RESILIENCE

Resilience is defined by the Economic Development Administration (EDA) as the ability of a region to anticipate, withstand, and bounce back from shocks and disruptions. While we often think of resiliency in terms of environmental disruptions, including natural disasters or climate change, there are several types of economic shocks in regional systems that can occur. These could include the closure of a large employer, the decline of an important industry, or changes in the workforce.

This CEDS provides the COEDD Region a map to move as a collective unit towards economic stability, inclusivity, and prosperity. The CEDS seeks to understand what current disruptions are occurring in the region, and how to plan for unanticipated shocks. While economic resiliency cannot be placed on one industry, business, or person alone, the numerous businesses, local governments, chambers, community development boards, and ultimately the citizens of the region are responsible for planning to develop proactive approaches. The 2022-2026 CEDS aims to build on the current work and initiatives in place, adapt to the rapidly changing world, and build programs for issues the community values and relies on.



### Industry Diversification

For decades the COEDD Region relied on the oil industry as its main source of jobs, revenue, and exports. As seen from past oil boom and busts, a risky over-dependence on a single industry sector can result in an extremely unstable community. While the oil and gas industry is still significantly important to the region's economy, motivating local leaders and planners to invest in the long-term resiliency of the community is needed for stable and sustained growth. Several emerging industries are present in the region, while other historical sectors are seeing consistent growth. Diversification efforts built and outlined in this plan should continue to be evolved to meet the needs of the region's business community.

### Regional Collaboration

While many of the counties and cities within the COEDD Region have a unique history and culture, the problems they face regarding economic and social issues remain largely the same. In order to match the scale of what is needed to improve industries and infrastructure around the area, regional solutions offer a form of resiliency that can impact more people, attract more funding, and help fix systematic issues. Unfortunately, regionalism can be hard to achieve due to competition in economic development and differences in community views. That said, as the region looks to fix its largest problems, many will rely on the leaders in each community who push for collaboration between partners, and work towards the shared goals and concerns of each community.

### Diversity, Equity, & Inclusion

Achieving economic resilience in the region also relies on addressing issues related to persistent poverty and economic inequity. The region will ultimately struggle with wealth creation if it does not focus on those populations that have been disproportionately impacted based on race, gender, sexual orientation, or disability. Regional stakeholders should embrace the idea of equity within the region and understand its relevance today as it can propel communities forward with proper leadership and support. For the COEDD Region to reach its goals of the future and outlined in this plan, they must consider diversity, equity, and inclusion each step of the way while pushing to elevate the economic development needs of the historically underserved business and populations in the community.



# COVID-19 IMPACT

Beyond the devastating social and physical impact, the economic impact triggered by the COVID-19 pandemic has been unlike any other the world has experienced. The pandemic hit all economies differently, as social distancing, restrictions on mobility, and even shutting down all nonessential economic activity was implemented. While the pandemic most certainly hurt the COEDD Region's economy in terms of lost jobs, revenue, and wages, the innovation and resiliency that many sectors showcased remains a positive sign moving forward. As we continue to embrace a changing world with quickly changing habits and practices, it will be crucial for the COEDD Region to continue to focus on how it can endure shocks to its economy in the future and what unique challenges it may face.

## Jobs

In the COEDD Region, jobs were steadily increasing from 2015-2019 until the pandemic hit in 2020. Peaking at 94,369 jobs in 2019, at the end of the 2020 year the COEDD region had 91,719 jobs resulting in roughly 3,500 jobs decline. That said, jobs are predicted to rebound in a “V-Shaped” curve and recover to pre-pandemic levels by 2023. By 2025, jobs are projected to be at 95,140 in the COEDD region.

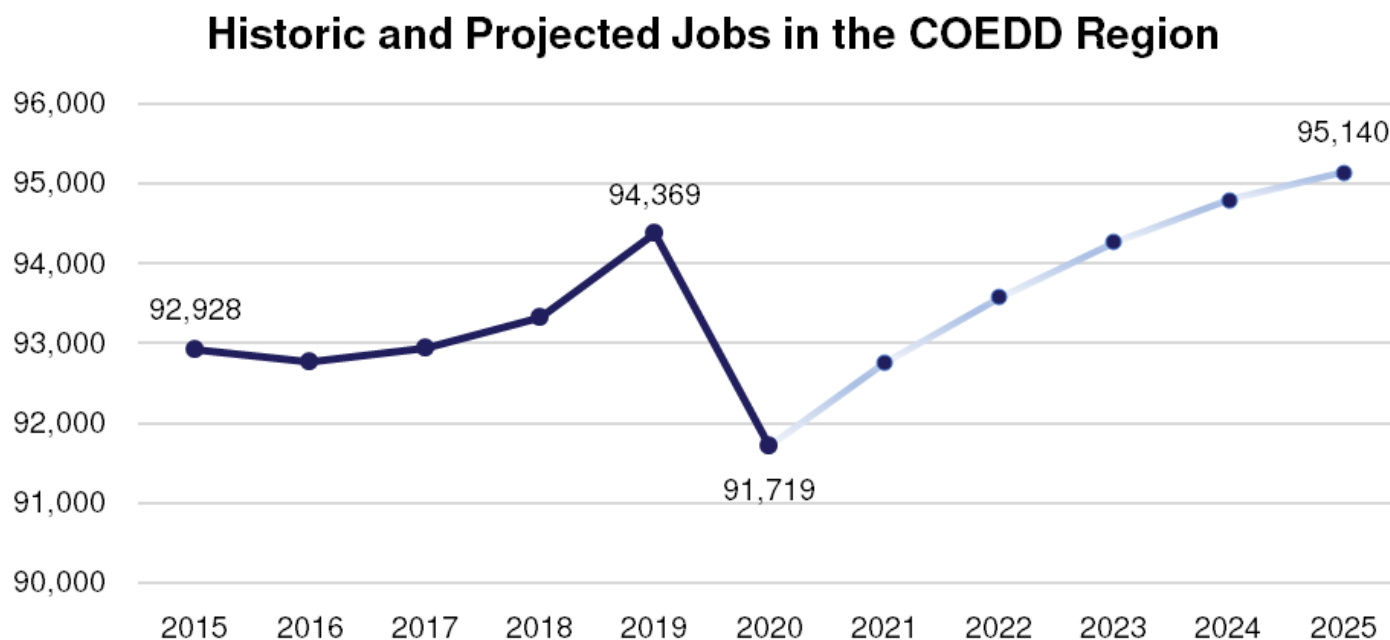


Figure 33: Regional Jobs, Emsi 2021.2



## Unemployment

Looking at the unemployment trendline over the past two years helps put into perspective the impact of the COVID-19 pandemic in terms of employment. From March 2020 to April 2020, unemployment in the COEDD region grew by 8,823 people. The total workers unemployed in the region has continued to fall and total unemployed workers in May of 2021 is now at pre-pandemic numbers. Current unemployment compared to March of 2020 (pre-pandemic) is also displayed to illustrate how the economy has recovered and what industries are still salvaging from the pandemic. The top three industries who had the greatest unemployment change and consequently still have the greatest gap from before the pandemic are the Accommodation and Food Services, Retail Trade, and Health Care and Social Assistance industries. Each industry as its own table breakdown that goes into further detail to show what top national industries (6-digit NAICS) that encompass the industry sectors were impacted the most due to the pandemic.

### Total Unemployment in COEDD Region

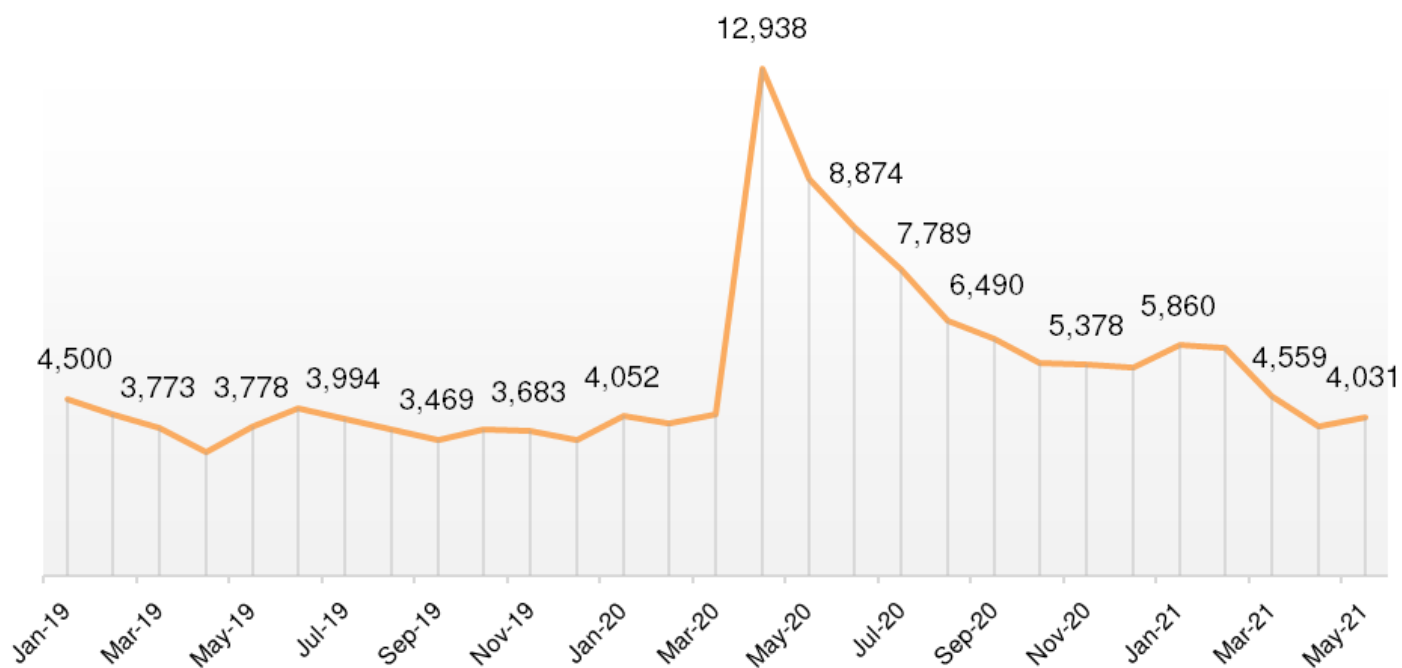


Figure 34: Regional Unemployment, Emsi 202.2



### 1. Accommodation and Food Services

National Industry (6-Digit NAICS)	Job Change	% Change
Full-Service Restaurants	(282)	(8%)
Limited-Service Restaurants	(79)	(2%)
Hotels and Motels (except Casino Hotels)	(78)	(15%)
Drinking Places	(28)	(14%)
Food Service and Contractors	(17)	(8%)

### 2. Retail Trade

National Industry (6-Digit NAICS)	Job Change	% Change
Department Stores	(78)	(17%)
All Other General Merchandise Stores	(74)	(10%)
Electronics Stores	(56)	(23%)
Family Clothing Stores	(55)	(26%)
Gasoline Stations with Convenience Stores	(47)	(5%)

### 3. Health Care and Social Assistance

National Industry (6-Digit NAICS)	Job Change	% Change
General Medical and Surgical Hospitals	(125)	(7%)
Home Health Care Services	(87)	(15%)
Child Day Care Services	(57)	(7%)
Offices of Dentists	(24)	(5%)
Assisted Living Facilities for the Elderly	(19)	(58%)

Table 9: Industry Specific Unemployment, Emsi 2021.2

## Occupation Impact

The top 10 increased and decreased occupations in terms of total jobs over the course of the pandemic were analyzed to see any potential trends in the region. The Customer Service Representatives occupation gained 141 jobs, the highest out of any occupation in the COEDD region since 2019, representing a 13% increase. Customer Service Representatives largely work remotely and with increased users on online platforms, were crucial for many businesses over the pandemic. Other occupations that saw large gains in employment since 2019 are Cooks, Fast Food gaining 108 jobs and Medical Assistants gaining 88 jobs. As seen, many health and medical occupations (medical assistants, registered nurses, physicians, etc.) increased greatly in the past two years.

Table 10: Regional Occupation Job Increase (5-Digit), Emsi 2021.2

Detailed Occupation (5-digit)	2019 Jobs	2020 Jobs	2021 Jobs (projected)	2019-2021 Job Change	
Customer Service Representatives	1,086	1,216	1,227	141	13%
Cooks, Fast Food	795	903	903	108	14%
Medical Assistants	411	493	498	88	21%
Project Management Specialists and Business Operations Specialists, All Other	330	410	422	92	28%
Registered Nurses	1,499	1,575	1,630	131	9%
Billing and Posting Clerks	214	262	264	50	23%
Physicians, All Other; and Ophthalmologists, Except Pediatric	164	209	211	47	29%
Licensed Practical and Licensed Vocational Nurses	823	868	867	45	5%
Postsecondary Teachers	2,937	2,975	3,002	66	2%
Sales and Related Workers, All Other	84	118	121	37	44%

The top occupation that saw the biggest decrease since 2019 was Teaching Assistants, Postsecondary, losing 363 jobs, or 67% of the occupational workforce. Higher Education universities around the country struggled to pull in revenue as many students remained off campus, while at the same time paying high expenses to sanitize and enforce social distancing guidelines. This caused major cutbacks around the country and several universities still are trying to recoup lost revenue. That said, the Cooks, Short Order, occupation lost the second greatest number of jobs at 196, or 56% of the occupation's workers. Short order cooks largely cook for small local restaurants and diners, who struggled significantly during the pandemic. The Retail Salespersons occupation lost the third highest number of jobs at 154. Many retail stores shutdown during lockdown periods accelerating the growing trend of more retailers moving to online platforms.

Table 11: Regional Occupation Job Decrease (5-Digit), Emsi 2021.2

Detailed Occupation (5-digit)	2019 Jobs	2020 Jobs	2021 Jobs (projected)	2019-2021 Job Change	
Teaching Assistants, Postsecondary	542	172	179	(363)	(67%)
Cooks, Short Order	351	155	155	(196)	(56%)
Retail Salespersons	2,666	2,480	2,512	(154)	(6%)
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1,989	1,812	1,794	(195)	(10%)
Cashiers	2,541	2,364	2,356	(184)	(7%)
Waiters and Waitresses	1,720	1,559	1,592	(128)	(7%)
Bartenders	648	513	514	(134)	(21%)
Fast Food and Counter Workers	2,805	2,689	2,766	(39)	(1%)
Roustabouts, Oil and Gas	323	208	190	(133)	(41%)
Heavy and Tractor-Trailer Truck Drivers	1,352	1,254	1,264	(88)	(7%)

### Remote Jobs

One of the many new developments caused by the COVID-19 pandemic is the rise of remote work or the growing choice for companies to let employees Work-from-Home (WFH). Unique job postings in the COEDD region have been steadily increasing for jobs that have been listed as remote. Already in 2021, roughly 2,850 jobs have been posted that have been identified as remote working, compared to 3,000 jobs posted in total for 2020.

### Unique Job Postings for Remote Work

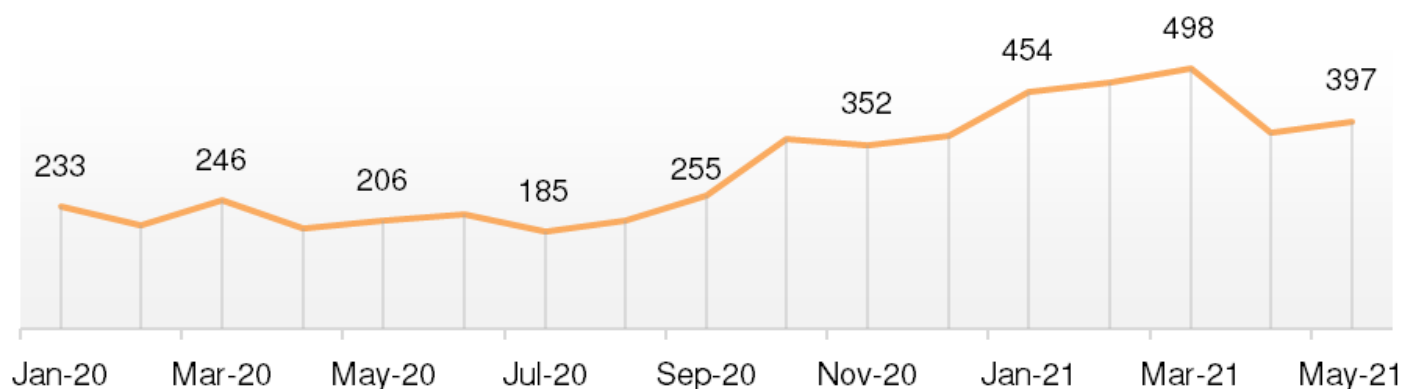


Figure 35: Remote Job Unique Postings in Region, Emsi 2021.2

## Tax Analysis

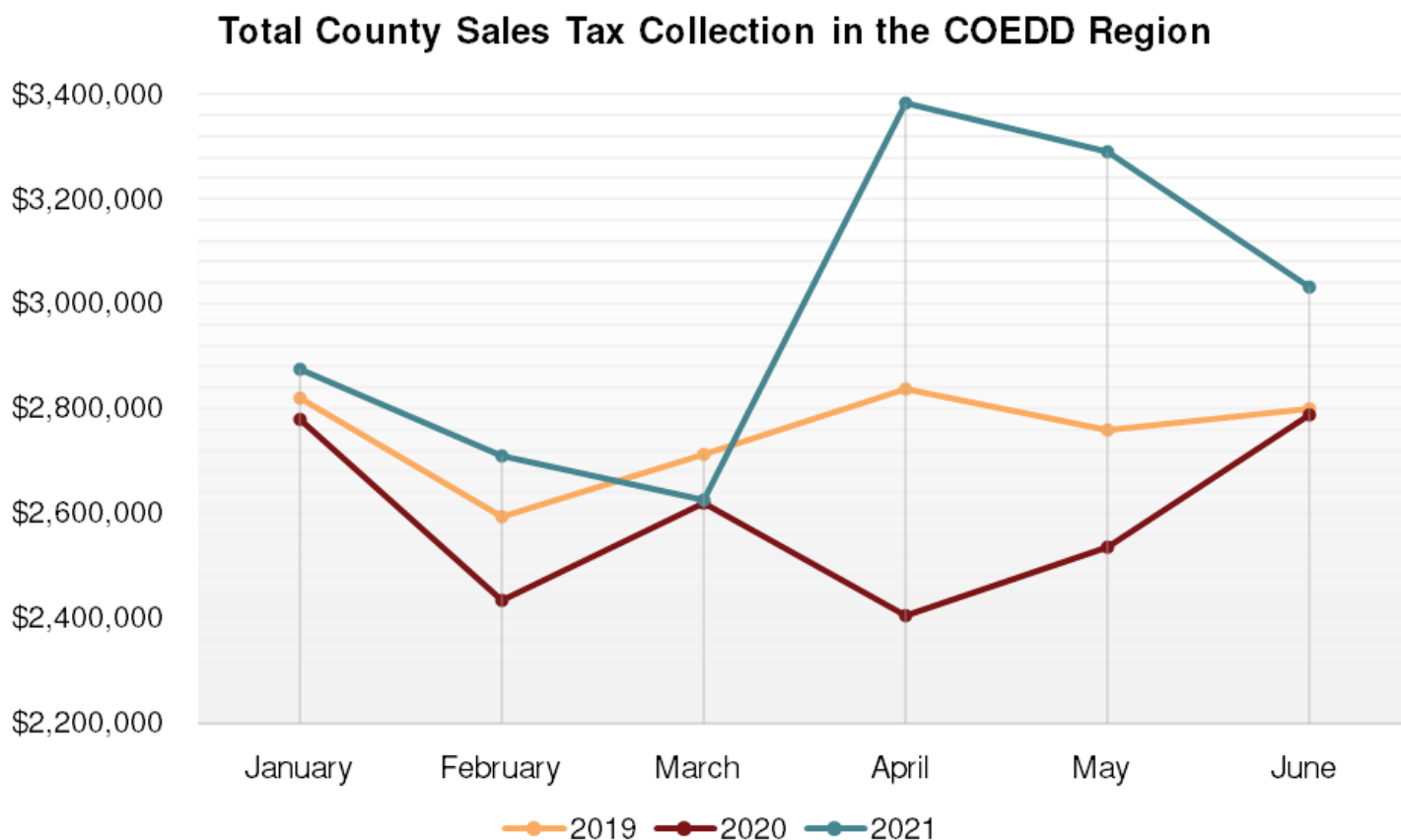
Local and state governments are major players in terms of employment and the overall economy in the United States and the COEDD region. With the pandemic impacting greatly how consumers spend and use their money, sales tax, use tax, and other taxes collected by the local entities were entirely disrupted. The impact of the pandemic is greatly important as the sales and use tax are the single largest source of revenue when considering all Oklahoma governments together. Shown below is the total tax collection in the COEDD region for county sales tax, use tax, and certain NAICS industries (Retail Trade, Accommodation and Food Services, and Arts, Entertainment, and Recreation). Also displayed are the sales and use tax rates for each county in the COEDD Region.

Table 12: Sales and Use Tax Data, Oklahoma Tax Commission

	Sales Tax Rate	Use Tax Rate	Total County Tax Rate
Hughes County	0.94%	0.06%	1.00%
Lincoln County	0.75%	0.25%	1.00%
Okfuskee County	1.81%	0.19%	2.00%
Pawnee County	1.87%	0.13%	2.00%
Payne County	0.75%	0.06%	0.81%
Pottawatomie County	1.25%	0.25%	1.50%
Seminole County	1.15%	0.10%	1.25%

## Sales Tax

County sales and use tax collection in the COEDD region is shown over the last three years through January-June. As a majority of our economy is based on consumption goods, the sales tax would seem to be the most vulnerable type of tax to the pandemic as consumption was purposefully and tactically limited. That said, as seen for sales tax, collection dipped in April of 2020, and was significantly lower than past collections for this period. That said, collections continued to bounce back until reaching 2019 numbers in June. One possible explanation for this, is that even with spending limited at retail stores and restaurants (in result of lockdowns and social distancing), grocery and department stores were busy with consumers stocking up on food and home improvement amenities. Many areas around the country saw this relationship, as the influx of people in grocery and department stores “made up” the difference for the lost revenue collection from restaurants and clothing retail. As seen from the 2021 numbers, sales tax collection for the county level has been above the two previous years, including much higher collections in April, May, and June. This could indicate a potential recovery of the COEDD economy.



\*Sales tax collection represented by actual month of spending, not when collection occurred (1-month after)

Figure 36: Total County Sales Tax Collection, Oklahoma Tax Commission

# SWOT ANALYSIS





## STRENGTHS

- Education and Training Opportunities
- Skilled Labor Force
- Diversity of Industries
- Infrastructure and Geographic Positioning
- Culture and History

## WEAKNESSES

- Funding and Infrastructure
- Attraction and Placemaking
- Political Representation

## OPPORTUNITIES

- Advancement in Technology & Telecommunications
- Diversity and History
- ARPA and Other Funding
- Regionalism
- Emerging Industries

## THREATS

- Ecommerce and Automation Trends
- Natural Resources
- Healthcare and Emergency Services Coverage
- Population Shifts

# STRENGTHS

The COEDD region boasts several strengths that are worth noting. To meet the goals of the community and the region, it's imperative for the COEDD region to recognize these strengths and leverage them to foster a prosperous future.

## Education and Training Opportunities

Undoubtedly one of the most significant strengths of the COEDD Region is the presence of multiple higher education universities as well as the strong standing of Technology Centers. Oklahoma State University (OSU), located in Stillwater, Oklahoma is a nationally recognized university with student enrollment over 25,000. Along with OSU is Oklahoma Baptist University (OBU), a private university located in Shawnee, Oklahoma. The availability of higher education is crucial for the area as job earnings have historically trended with education attainment, and higher education attainment for the COEDD Region continues to be below the state and national averages.

In addition to the multiple higher education offerings, the area's network of Technology Centers is another important asset for the region. The COEDD Region is home to three Technology Centers, including Meridian, Gordon

Cooper, and Wes Watkins, each offering courses in full-time career training programs, short courses, online classes, and specialized certifications. Multiple Technology Centers also reside close to the COEDD Region boundaries and serve parts of the region. With the ability to grow and develop a skilled workforce in a time where skilled labor is in increasingly high demand, the tech centers presence brings in national companies looking for skilled labor as well as students and citizens looking to gain more education.

## Skilled Labor Force

In addition to the skilled training afforded through the network of Technology Centers, the presence of other industries in the region provides a skilled labor force. These industries include medical, healthcare, trucking and warehousing, manufacturing, and construction. Each industry requires a skilled and talented workforce, and the supply for these types of occupations are growing in the region. A skilled labor force

is critical in retaining high quality jobs, with higher wages and benefits. Higher wages have a multiplying effect in the regional economy, providing workers with more purchasing power to buy other goods and services from regional businesses.

## Diversity of Industries

The COVID-19 pandemic hit several regions around the country considerably hard, including those who rely heavily on hospitality and entertainment. The COEDD Region, with an outsized share of jobs in the government and education sectors is representative of a diverse industry mix. That industry mix positions the region well to minimize the effects of nationwide downturns caused by macroeconomic elements or unforeseen events such as a global pandemic. The COEDD region, featuring a concentration of government jobs, health care and social assistance, manufacturing, and construction employment opportunities, will allow the region to remain stable through turbulent



times. A diverse industry mix is also an opportunity for business and industry attraction, and shared resources across labor markets and infrastructure assets.

### Infrastructure and Geographic Positioning

A robust multi-modal transportation system allows industry to prosper and citizens more employment opportunities across the COEDD Region. The highway infrastructure system is a strength; the condition of the roads is adequate and form a solid network of primary and secondary roads and access points. In addition, several state highways run through the region and bring in goods and people. Further, the rail network is also particularly strong in the region, with three Class I railroads and three Class III railroads operating in the area. Finally, key water ports lie in close proximity to the district and continue to drive economic and community development. The geographic positioning of the COEDD Region is another significant strength of the region.

Being strategically positioned between the two largest cities in the state (Oklahoma City and Tulsa), the region serves as a bedroom community for many who commute into the larger cities. Located in Oklahoma, the COEDD region is also strategically positioned to be in the central US, with access via trucking and rail to each coast quicker than a noncentralized location. Finally, with much of the region being defined as rural and in areas with low utility costs and taxes, the cost of living is significantly less than nearby cities and regions.

### Culture and History

The rich cultural heritage and history of the COEDD region contributes to its unique identity. Part of that culture includes several regional specific events and festivals, putting the area's history on full display. The Balloon Fest, Historic Route 66, and several Museums are specific examples of cultural attractions that bring people to the region. Additionally, a burgeoning music scene and

an abundance of casinos in the region provide more contemporary entertainment options. Oklahoma State University and Stillwater also drive tourism, as each community features many unique businesses and attractions, in addition to world-class collegiate athletics and sporting events.

In addition, the region is home to several tribes where relationships have been built to coexist within the region. The tribal nations undoubtedly represent the spirit of the region and Oklahoma, while also providing a diverse set of views and customs. The region is also home to some of the nation's oldest historically black communities, celebrating the diversity of the region and the opportunity to succeed. Finally, many of the towns have historic downtown areas that have historic buildings and sites. Having the opportunity to embrace the rich history and culture of the area is a unique and robust strength for the region.



# WEAKNESSES

While there are many strengths within the COEDD Region, there are also several weaknesses that persist in the region. Weaknesses are presented through a wide lens, from tax collection and political environment to current changes in human interaction.

## Funding and Infrastructure

One considerable challenge the COEDD region faces is the inability to collect taxes to sufficiently fund community and economic development projects. Many areas in the region are seeing a decline in population, while also seeing more businesses move online hurting both sales and income taxes. Additionally, Oklahoma is unable to tax income earned by tribal citizens who live and work on their tribe's land. The State also provides several sales tax exemptions and incentives that can impact overall tax collection. The declining tax base and challenges related to tax collection impacts several aspects of the community, including insufficient funding for infrastructure projects like transportation improvements, and high-speed broadband infrastructure and deployment. With access to broadband being critical to post COVID-19 life, the need to upgrade and install new fiber/cable broadband is desperately needed in certain areas in the region.

## Attraction and Placemaking

While the COEDD Region consists of several cities with historic downtowns, these downtowns have not seen recent investment, growth, and development. Specifically, one result of years of disinvestment is the increase of blighted properties. Many buildings and structures have gone without repair or investment in several years. The private market has not stepped up to rehab and redevelop these properties because the expense of revamping old structures can be incredibly costly. Several cities are struggling to reinvent their downtown and bring back new businesses and attractions, especially after the COVID-19 pandemic. Placemaking in these downtown areas cannot be solved overnight, and the addition of one or two new buildings does not solve the issue.

## Political Representation

A weakness that impacts the entire region is the declining representation of rural seats and power in the Oklahoma political atmosphere. Urban areas have continued to outpace the growth of many rural counties, as one growing trend is the movement of citizens back into cities. The loss of population shifts the political atmosphere and can impact who gets a seat at the table. For decades the rural population was well represented and had a strong hold of power because rural voters continued to elect those they deemed successful in bringing home improvements and investments. Since Oklahoma's legislature has been subject to term limits of 12 years, there is no opportunity to develop seniority. With reduced representative seniority, power is dwindling, which has direct impacts on where funding goes and what policies are implemented.



# OPPORTUNITIES

Several opportunities exist in the COEDD Region. From new industries and technology to the history and diversity that the region holds, there is a broad range of opportunities that exist and can drive growth for the region.

## Advancement in Technology and Telecommunication

One of the rare positive aspects of the COVID-19 pandemic was the advancement of online services and capabilities. Countless jobs have moved online, with many moving permanently online and providing more flexibility and options to workers. The ability to work remotely has increased what jobs are offered in the region and allow for several industries to grow their footprint. Another enormous benefit to online services is hospitals and doctors can work online and provide “Tele-Health”. Many rural citizens that otherwise do not have access to a nearby doctor or physician can now be served by any doctor online and receive consistent and reliable service. Additionally, the advancement in online schooling has also provided citizens the ability to seek new education opportunities without having to leave their home.





## Diversity and History

As the rich diversity and history is considered a strength for the region, it equally is considered an untapped opportunity moving into the future. Several communities have tapped into their history and culture to provide new attractions for residents and also provide a spark for new downtown growth. One example of this would be the growing trend of providing specific assets to Arts and Culture in downtown plans and comprehensive strategies. Distinctive and local art has been an excellent tool for communities to showcase what diverse populations exist in their regions, while also bolstering downtown attractions and landscape. The COEDD Region has the unique history and ties to the Native American population, as well as having some of the oldest historically black communities. Embracing and showcasing the diversity and history within the COEDD Region is a major opportunity to spark new life and growth in downtown and community areas.

## Emerging Industries

The diverse set of industries in the region not only provide stability in terms of jobs, but also to opportunity for new and emerging industries to grow. The Arts, Entertainment, and Recreation, Agriculture, Forestry, Fishing, and Hunting, and Transportation and Warehousing industries are examples of industries expected to see significant growth in the next five years. Each industry was severely impacted by the pandemic, with the Transportation and Warehousing sector now

needing hundreds of truck drivers and workers to help with the increased online sales volume as well as warehousing back fill. Other emerging industries specific to the region include the Cannabis sector. The region currently is seeing an influx of business move within its borders and develop grow houses, warehousing/distribution sites, and brick and mortar stores. Finally, the Health Care and Social Assistance industry is seeing rapid growth as the population continues to age, and more nurses and healthcare professionals are needed. These industries, as well as countless more that are projected for growth are major opportunities for the region to strength its economy and capitalize on future trends.

## ARPA and Other Funding

Due to the COVID-19 pandemic, there is currently more federal funding available, and coming available, to communities than ever before. This opportunity to win large sums of grant money has caught the attention of every community around the nation as dollars can be used for a wide range of projects and activities. Money from the Economic Development Administration (EDA) and Main Street America are specifically focused on community projects to help develop and grow communities. The COEDD Region has the ability to apply and win countless dollars as well as receiving money from the state and directly from the federal government on previous emergency acts. The incoming flow of funding is a massive opportunity to upgrade current infrastructure and services, as well as help develop struggling areas and bring

life back to certain downtown areas.

## Regionalism

One major opportunity for the COEDD Region is to better its regional efforts. A majority of towns and communities in the region are rural. For this reason, partnering together on regional plans and goals is an excellent way to tie funds together and make a larger impact. Specifically, being effective and efficient in addressing investing funds for long-term benefits, while balancing competition between areas and common goals is a major opportunity for future growth and development. Acting on current funding and potential grants by combining resources and ideas is also an opportunity to address the capacity and funding issues that region currently holds. Several ways to foster stronger regionalism in the area persist, including the potential collaboration between planning districts, and adding new communication channels between city chambers and boards. Planning for the future with a more regional approach could be a way to grow smarter and invest in infrastructure that makes the largest difference. While regionalism cannot solve all of the problems facing the region in the future, it is an excellent opportunity to work towards a common goal and build off each county and cities strength.

# THREATS

Threats to the economy, workforce, and community are present in every region around the country. Several threats endure in the COEDD Region, many that are common in rural communities. While threats can be universal and macroeconomic, there are also several unique threats the region that must be addressed in order to grow moving forward.

## Population Shifts

Certainly, one of the largest threats identified was the current population shifts in the region and the impacts this has on the workforce and community. Older generations are starting to retire, and as more baby boomers leave the workforce, the institutional knowledge, and skills they hold, leave as well. Additionally, many employers that need to hire skilled labor positions are in tough competition, as the current field of qualified and willing applicants is smaller than the demand. The supply of new and younger workers to fill in for the positions that will be open is needed in order for businesses to stay in the region and ultimately expand and grow. Another threat identified with the changing population shift was the change in how citizens interact and live in the community. There is a perceived diminishing public service culture and a smaller pool of eligible leaders in the community who want to be involved. This also impacts what citizens come to events and support downtown.

With less involved citizens the many volunteer boards and positions that are needed to help run and support the community would no longer be filled. While many citizens still care deeply about the community the threat of losing a culture of involvement and service could have major implications on the region.

## Ecommerce and Automation Trends

The growing trend of businesses moving to online platforms, including most notably traditional retail stores, has impacts on the entire community. With more businesses moving online, companies are leaving their brick-and-mortar stores, emptying downtown areas, and threatening the vitality of the community. There is a present need for new businesses to occupy old buildings and spaces in blighted downtown areas, but with online sales booming after the COVID-19 pandemic, storefronts are hard to fill. Additionally, less stores downtown mean less people

who are traveling in the area to work, shop, and eat. The entire ecosystem can be thrown off with just a few stores leaving, and the threat of more businesses moving online brings the question of what struggling downtowns will do to stay alive.

Additionally, another threat with the growth of ecommerce is the movement to more automated services. Whether this be in the food services industry, manufacturing, or other vulnerable positions, the increased focus on automating services is a threat to jobs and occupations in the area. While advancements in technology can bring new jobs, it is also important to recognize what jobs are at stake and which may possible be replaced.

## Natural Resources

While the COEDD Region has a generally temperate climate and close to many natural resources, there are still natural resource constraints that threaten the vitality of the area. Specifically, the water

supply is a growing threat to the community as several industries have taken large portions of the supply and years of oil exploration with little consideration of pollution has left some rural areas without suitable drinking water. The fast-growing Cannabis industry is an example of one sector that has a growing need for water. Additionally, while water problems are easily identified and traced, the limited funding available to fix this infrastructure has left some towns having below desirable levels of water quality.

### Healthcare and Emergency Services Coverage

A growing concern for the region is the healthcare coverage that is currently available, especially for rural citizens. While telehealth and virtual doctors have increased the range of where service can be held, several areas in the region have inadequate access to pharmacies, primary care providers, hospitals, trauma centers, and low-cost health centers. Referred to as “Healthcare” desserts, rural

counties are at much greater risk of having lower service than their urban counterparts. Additionally, emergency services coverage is lacking significantly in the area, as cities and communities cannot afford their own ambulance and paramedic services. The combination of low population density mixed with a large geographical area, means less taxes to pay for these services over a larger and consequently more expensive space.





# STRATEGIC DIRECTION

The COEDD region has identified those priority needs which will increase competitiveness by leveraging strengths and addressing barriers to growth. Four focus areas were selected with input from the CEDS Task Force:

**ATTRACTION & PLACEMAKING**

**EMERGING INDUSTRIES & OCCUPATIONS**

**LEADERSHIP & REPRESENTATION**

**FUNDING & INFRASTRUCTURE**

These four focus areas provide a framework for essential elements of the regional economy. The goals and strategies set forth within this framework create a measurable action plan for the advancement of the Central Oklahoma Economic Development District.

## ATTRACTION & PLACEMAKING

As the region continues to recover from the pandemic and the ongoing labor market shortage, restoring population and attracting new talent is becoming a major challenge and competition throughout the country. The COEDD Region's goal is to focus on the strong amenities it provides, and work to focus on creating quality places through good design that attracts all kinds of people. COEDD prioritizes this goal as critical to improve quality of life; leverage built and natural assets; enhance arts and culture; develop resilient communities; spur economic investment; and ensure the region remains an attractive location for both talent and business.

Through this goal, COEDD will inspire a variety of projects such as downtown revitalization, adaptive reuse, blight elimination, and increased walkability. Project for Public Spaces defines placemaking as, "Strengthening the connection between people and the places they share; placemaking refers to a collaborative process by which we can shape our public realm in order to maximize shared value. More than just promoting better urban design, placemaking facilitates creative patterns of use, paying particular attention to the physical, cultural, and social identities that define a place and support its ongoing evolution."

Central Oklahoma has a rich cultural heritage and arts community. Festivals, events, museums, and performances draw visitors from around the globe. Events like the FireLake Fireflight Balloon Festival, and attractions including Historic Route 66 and Mabee-Gerrer Museum of Art are just a few of the examples that bring visitors into the region. From strong tribal communities to the concentration of historically black communities, the region has unique opportunities to leverage history and diversity in attraction and placemaking.

# ATTRACTION & PLACEMAKING

## Goal 1: Increase quality of life and visitor and resident attraction through placemaking.

Engaging in placemaking with community stakeholders, while keeping what the region holds as a competitive tourism advantage in the forefront, can lead to opportunities for growth. Beyond tourism, placemaking efforts serve to increase quality of life for residents and encourage meaningful social interactions within the community. The attraction of both tourists and residents to these redesigned places will also boost the success of adjacent local businesses. COEDD will assist communities throughout the region in identifying potential funding sources for these efforts.

**COEDD has outlined the following strategies to achieve this goal:**

- Strategy 1: Assist communities in developing achievable plans.
- Strategy 2: Create feedback loops for continual qualitative and quantitative evaluation.
- Strategy 3: Provide placemaking examples and demonstrations to communities throughout the region.
- Strategy 4: Leverage unique natural and cultural assets for regional marketing and attraction efforts.



### PARTNERS AND RESOURCES

- COEDD
- County and Municipal Government
- Chambers of Commerce
- Main Street Programs
- Downtown Associations
- Convention and Visitor Bureaus
- Arts organizations
- Nonprofits
- Businesses

See evaluation framework located on page 73.



# ATTRACTION & PLACEMAKING

## Goal 2: Facilitate the intentional involvement of youth in planning and implementation.

The collaborative nature of placemaking demands involvement. The COEDD region is particularly interested in nurturing the involvement of youth, as this demographic has been identified as critical to engage moving forward in the planning process for the region. Through this goal, COEDD will be able to tap into creative minds and gain perspective on what this generation values most in their community. The goal is to bolster community pride and develop a bond with those involved with the intention of retaining young talent long-term.

COEDD has outlined the following strategies to achieve this goal:

- Strategy 1: Develop and implement outreach plans to engage youth in the region.
- Strategy 2: Gather ideas and input from youth.
- Strategy 3: Solicit feedback from youth participating in placemaking efforts.



### PARTNERS AND RESOURCES

- COEDD
- County & Municipal Government
- K-12 Schools
- Youth Organizations
- Higher education (vocational-technical schools, colleges, universities)
- Young Professional Organizations

See evaluation framework located on page 74

## EMERGING INDUSTRIES & OCCUPATIONS

The COEDD Region holds several specialized industries that promote diversified and unique occupations for its population. That said, capitalizing on the emerging industries in the region can promote entrepreneurship, innovation, and be a catalyst for growth for the entire economy moving forward. As the region's business economy relies on those skills and abilities of the current workforce, supporting the ability to upskill and reskill employees is crucial to the growth of high paying and potentially new jobs in the region. The future workforce relies on several sectors in the area working together towards a common goal, including the private, public, and education spheres collaborating on a joint effort. With a united goal to help incrementally transform the current workforce, the region's economy can thrive in providing a supply of talent and skills to the emerging industries in the area, while boosting the overall economy.

# EMERGING INDUSTRIES & OCCUPATIONS

## Goal 1: Strengthen the regional workforce through focused education, training, and awareness of programs and career opportunities.

COEDD takes a direct approach to addressing the gap between labor market demands and education. Through close relationships between employers and educators, the region will increase awareness of career opportunities and increase course availability and access to higher education. Soft skills and digital literacy training are prioritized in this goal to ensure that the region's workforce is prepared for long-term and successful employment. Effective and diverse workforce investment boards are essential to implementing this approach.

Many of the most important emerging industries and occupations rely heavily on skills in science, technology, engineering, and math (STEM). COEDD is dedicated to increase student excitement about STEM learning. The strategies outlined to achieve this goal include pilot programs for early and continued STEM learning; demonstrating what success could look like within a STEM career; and promotion of STEM through marketing its advantages and associated career opportunities.

The region's strong vocational-technical training positions COEDD well for the continued development of in-demand skilled trades workforce. An important step toward success in this strategy will be to increase participation from both employers and potential employees in internships, apprenticeships, and work-based learning programs. COEDD will identify barriers to participation and work with stakeholders to address the challenges.

COEDD acknowledges that significant barriers to employment exist, particularly among disadvantaged populations and in the more rural areas of the region. Among these barriers, access to affordable childcare and transportation were identified by stakeholders as essential.

### COEDD has outlined the following strategies to achieve this goal:

- Strategy 1: Develop and maintain regional database of relevant programs and resources and evaluate to identify and address gaps.
- Strategy 2: Educate employers, students, and workers about emerging occupations and available programs, resources, and processes.
- Strategy 3: Increase access to and participation in STEM curriculum, apprenticeships, internships, and work-based learning.
- Strategy 4: Increase career-readiness among current and future workers through soft skills and digital literacy training and addressing barriers to employment such as childcare and transportation.

### PARTNERS AND RESOURCES

- COEDD
- K-12 Schools
- Higher education (vocational-technical schools, colleges, universities)
- Business and industry

See evaluation framework located on page 75



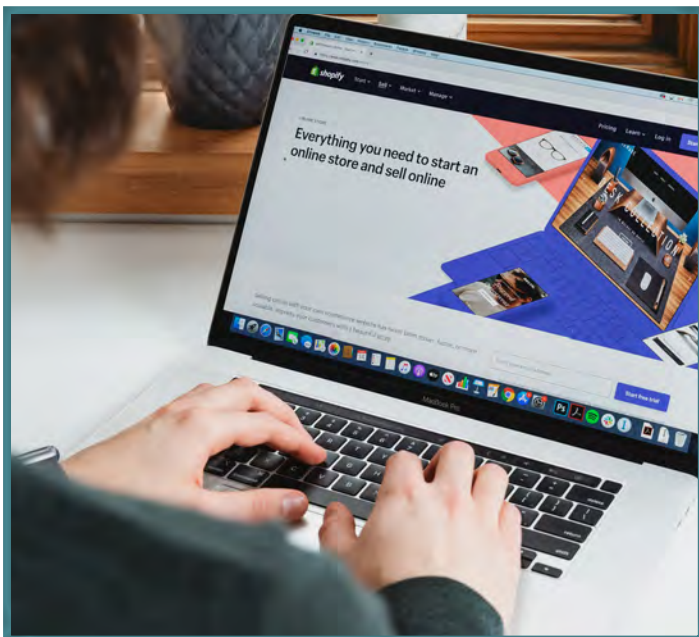
# EMERGING INDUSTRIES & OCCUPATIONS

## Goal 2: Grow regional business retention, expansion, and recruitment through outreach, support, and access to resources.

The COEDD region is dedicated to business growth, entrepreneurship development, and supporting small businesses. With ecommerce, automation, and other trends, it is increasingly important for regional leaders to be aware and respond to business needs. To identify and address the challenges businesses face, outreach and communication are essential. COEDD will work with regional partners to contact and gather information from businesses, start-ups, and entrepreneurship programs. With this important feedback, COEDD and its partners can better assist businesses with planning and the resources necessary to be successful.

### COEDD has outlined the following strategies to achieve this goal:

- Strategy 1: Assist communities in developing business retention and expansion (BRE) strategies and business outreach plans with special consideration for emerging industries and small, minority-owned, woman-owned, and veteran owned businesses.
- Strategy 2: Conduct regional scan of entrepreneurship and innovation programming and resources.
- Strategy 3: Assist businesses in accessing capital and other resources, such as business planning and continuing education.
- Strategy 4: Develop and secure resources for small business marketing assistance and digital literacy programs.



### PARTNERS AND RESOURCES

- COEDD
- Oklahoma Southeast
- Oklahoma Department of Commerce
- Economic Development Organizations
- Chambers of Commerce
- Main Street Programs
- Downtown Associations
- Convention and Visitor Bureaus
- Local Governments

See evaluation framework located on page 76



## LEADERSHIP & REPRESENTATION

To realize its vision, COEDD must engage leaders and promote regional collaboration. Community stakeholders mentioned the need for more involvement and direct ways for citizens to be involved and engaged with community matters. The concern of decreased involvement has threatened several organizations that rely on volunteers while also decreasing the sense of community connectedness and place. While the underlying goal of community programs is to inspire new leaders and create leadership opportunities, in the COEDD Region, programs can also be tailored more specifically for professional development and skill-building. Programs which promote regionalism and increase awareness of funding and grant opportunities, for instance, can be a step in the right direction towards increased engagement and involvement, while promoting a sense of ownership for those in the community.

Shifts in political representation, particularly at state and local levels, was also a key topic of concern among stakeholders. Resources and representation are generally based on population, leaving rural areas at a disadvantage. Resilient communities must demonstrate government efficiency and responsiveness in order to be successful. The COEDD region is focused on advocating for support and funding of regional goals.



# LEADERSHIP & REPRESENTATION

## Goal 1: Increase engagement with young talent and emerging local leaders.

As the population in the region ages, those retiring from leadership roles take with them institutional knowledge and experience. As part of succession, it is critical to identify and mentor potential new leaders. COEDD recognizes the importance of diverse leadership for innovative and equitable solutions.

**COEDD has outlined the following strategies to achieve this goal:**

- Strategy 1: Develop list of leadership programs, professional groups, and volunteer opportunities and address gaps that may exist in the region.
- Strategy 2: Promote participation in leadership programs, professional groups, and volunteer opportunities throughout the region.



### PARTNERS AND RESOURCES

- COEDD
- Elected officials and government staff
- Leadership programs
- Professional groups

See evaluation framework located on page 77



# LEADERSHIP & REPRESENTATION

## **Goal 2: Expand outreach to businesses, communities, and elected officials with an emphasis on awareness of programs, funding opportunities, professional development, and regional collaboration.**

Leadership and professional development programs are essential in the ongoing education and training for community leaders. These skill-building programs can engage specific underrepresented populations or be open to the greater community while offering an opportunity to stimulate civic engagement. The social capacity that is added by these programs can benefit not only the local agencies and individuals that attend, but the entire community.

### **COEDD has outlined the following strategies to achieve this goal:**

- Strategy 1: Determine and address professional development needs.
- Strategy 2: Develop engagement plan to improve understanding of civics and increase community involvement.
- Strategy 3: Create and maintain database of relevant programs and funding opportunities.



### **PARTNERS AND RESOURCES**

- COEDD
- Economic Development Organizations
- Chambers of Commerce
- Elected officials and government staff
- Industry partners

[See evaluation framework located on page 78](#)



An aerial photograph of a rural landscape. A paved road runs diagonally from the bottom left towards the top right. To the left of the road is a large green field with a white barn and a smaller building. To the right of the road is another field with some trees and a small cluster of buildings in the distance. The sky is overcast with grey clouds. A dark red banner with an orange diamond shape on the right side is positioned at the top of the image.

## FUNDING & INFRASTRUCTURE

To prosper in a contemporary economy, communities need to invest in modern infrastructure. Most notably, a community must make necessary investments and provide residents with equitable access to high-quality broadband. Broadband has become increasingly vital in all facets of life, including business, health, and education. Thankfully, the federal government recognizes this need, and has developed new and recapitalized existing funding sources through various agencies including the Economic Development Agency (EDA) and United State Department of Agriculture (USDA). The COEDD region should make intentional efforts to identify potential funding sources to upgrade traditional and modern infrastructure across the region. This requires a collaborative approach from civic, business, and economic development leaders. Identifying funding sources is the first step, the COEDD region should also consider building capacities in key organizations to successfully apply for competitive grants and build out the administrative support required to best utilize formula-driven funding opportunities. Beyond broadband, the COEDD region should assess the status of traditional infrastructure and the state of current critical government services. Funding is available to address capital needs and shore up tight budgets to ensure government can continue to offer critical services.



# FUNDING & INFRASTRUCTURE

## Goal 1: Strengthen regional healthcare services.

Access to healthcare services is critical, yet those in the COEDD Region, especially those in rural areas, are facing a variety of access barriers. Rural residents are particularly prone to access gaps in emergency services, as available and obtainable services need to be accessed in a timely manner. Other barriers also exist in access including financial means to pay for services, means to reach and use services, communication barriers, and quality concerns.

**COEDD has outlined the following strategies to achieve this goal:**

- Strategy 1: Identify locations, capacity, and services for medical providers, emergency services, and clinics in the region.
- Strategy 2: Evaluate HPSA score and identify most common needs such as urgent care, pharmacies, mental health care, and substance abuse resources
- Strategy 3: Advance Telehealth and Telemedicine with increased broadband infrastructure
- Strategy 4: Increase awareness of healthcare options and wellness programs.



### PARTNERS AND RESOURCES

- COEDD
- Oklahoma Hospital Association
- Local and Regional Hospitals
- Oklahoma State Health Department
- Oklahoma Healthy Communities
- Tobacco Settlement Endowment Trust (TSET)
- Telehealth/Telemedicine providers

See evaluation framework located on page 79

# FUNDING & INFRASTRUCTURE

## Goal 2: Build capacity for the development of public/private partnerships, planning, and leveraging funding.

Local governments and economic development organizations lack the capacity to fully leverage their assets. Public/private partnerships can help to address the issue. According to the Council of Development Finance Agencies, “a public-private partnership (P3) is a contractual arrangement where a government agency contracts with a private partner to renovate, construct, operate, maintain, and/or manage a facility or system that provides a public service.” P3 models are ideal for communities who have insufficient capacity to deliver complex services, such as providing rural communities with broadband access.

The COEDD region sees recent federal funding initiatives as a unique opportunity to leverage public funding to attract private sector funding and partnerships to enhance critical infrastructure such as broadband deployment. In addition to federal funding, COEDD provides and promotes a number of services and funding programs to help businesses and communities prosper, including grant administration assistance, industrial park development funding, small and large business financing packages, and revolving loan funds. The promotion and increased use of these services can help improve local organizations capacities and create new partnerships and opportunities.

### COEDD has outlined the following strategies to achieve this goal:

- Strategy 1: Provide education for public officials and staff on infrastructure costs, planning, and prioritization.
- Strategy 2: Create and maintain guide to important programs and local, state, and federal funding opportunities.
- Strategy 3: Promote funding and service opportunities provided by COEDD



### PARTNERS AND RESOURCES

- COEDD
- Business and Industries
- Financial Institutions
- Local government
- EDA

See evaluation framework located on page 80

## FUNDING & INFRASTRUCTURE

### Goal 3: Expand quality broadband service access and affordability throughout the region.

One of the most critical needs in the COEDD region is broadband access. As work, education, healthcare, and other important services have become more virtually integrated, broadband has become essential to quality of life and business operations. In rural areas of the region and among disadvantaged populations, affordability to quality broadband will ensure more equitable access to access to vital services. Broadband is also an important link to communication and connectivity across the region.

#### COEDD has outlined the following strategies to achieve this goal:

- Strategy 1: Establish collaboration between communities to identify gaps in coverage and develop a regional approach to meet the challenges of broadband expansion.
- Strategy 2: Increase broadband connectivity and affordability across the region, focusing on underserved locations.
- Strategy 3: Increase broadband capacity to meet or exceed standards.



#### PARTNERS AND RESOURCES

- COEDD
- Local government
- Broadband providers
- Rural Electric Coops
- U.S. Economic Development Administration
- Oklahoma Department of Commerce
- Rural Broadband Expansion Council

See evaluation framework located on page 81



# EVALUATION FRAMEWORK



## ATTRACTION & PLACEMAKING

### Goal 1: Increase quality of life and visitor attraction through placemaking.

	Timeframe	Progress Update	Achieved
Outreach to communities to assist in creating simple, achievable plans.	1-2 Years		
Provide communities with example feedback loops and create one between communities and COEDD.	1-2 Years		
Provide demonstrations and examples of placemaking efforts.	1-2 Years		
Discuss planning progress with communities and provide further guidance and assistance.	3-4 Years		
Analyze feedback loop results for key takeaways and metrics.	3-4 Years		
Convene partners and develop/revise regional marketing plan.	3-4 Years		
Review completed plans for each community and provide assistance with implementation as needed.	5+ Years		
Evaluate feedback loop for effectiveness and revise where needed.	5+ Years		
Provide demonstrations and examples of placemaking efforts.	5+ Years		

#### Metrics:

- Projects completed
- Participation in local feedback loops
- Marketing reach
- ODOT traffic counts
- Number, amount, and location of Community Development Block Grant (CDBG) awards

#### Partners and Resources:

- COEDD
- County and Municipal Government
- Economic Development Organizations
- Chambers of Commerce
- Main Street Programs
- Downtown Associations
- Convention & Visitor Bureaus
- Arts organizations
- Nonprofits
- Businesses

## ATTRACTION & PLACEMAKING

### Goal 2: Facilitate the intentional involvement of youth in the placemaking process.

	Timeframe	Progress Update	Achieved
Develop plans for outreach to youth in the region.	1-2 Years		
Implement outreach plan, including feedback from participants.	3-4 Years		
Gather ideas and input from youth on what they would like to see in their communities.	3-4 Years, Ongoing		
Involve youth in placemaking demonstrations and efforts.	3-4 Years, Ongoing		
Revise and implement outreach plan, including feedback from participating youth and partners	5+ Years		

#### Metrics:

- Creation and implementation of outreach plans
- Participation in feedback loops
- Quantitative and qualitative data from feedback
- Number of participants

#### Partners and Resources

- COEDD
- County & Municipal Government
- K-12 Schools
- Youth Organizations
- Higher ed (vocational-technical schools, colleges, universities)
- Young Professional Organizations

## EMERGING INDUSTRIES & OCCUPATIONS

**Goal 1: Strengthen the regional workforce through focused education, training, and awareness of programs and career opportunities.**

	Timeframe	Progress Update	Achieved
Determine what programs currently exist.	1-2 Years		
Assist schools in identifying success stories and engaging with those businesses and individuals. Collect Feedback.	1-2 Years, Ongoing		
Research best practices for regional STEM promotion and engagement.	1-2 Years		
Research best practices to address childcare, transportation, and other barriers to employment within rural communities. Convene partners to develop strategies focused on tackling those challenges.	1-2 Years		
Educate employers on available programs, resources, and processes including internships, apprenticeships, and work-based learning	1-2 Years		
Develop and implement marketing plan to promote STEM, apprenticeships, internships, and work-based learning to engage students and current workforce	3-4 Years, Ongoing		
Work with partners to increase career-readiness through soft skills training and digital literacy	3-4 Years, Ongoing		
Implement plan to address barriers to employment such as childcare and transportation. Measure outcomes.	3-4 Years, Ongoing		

### Metrics:

- Number of businesses/individuals engaged in providing success stories
- Qualitative data from feedback loops
- Number of students participating in STEM programs

### Partners and Resources:

- COEDD
- K-12 Schools
- Higher ed (vocational-technical schools, colleges, universities)
- Business and Industry

## EMERGING INDUSTRIES & OCCUPATIONS

### Goal 2: Grow regional business retention, expansion, and recruitment through outreach, support, and access to resources.

	Timeframe	Progress Update	Achieved
Assist communities in developing business retention and expansion (BRE) strategies and business outreach plans with special consideration for emerging industries and small, minority-owned, woman-owned, and veteran owned businesses.	1-2 Years, Ongoing		
Conduct regional scan of entrepreneurship and innovation programming and resources.	1-2 Years, Ongoing		
Assist businesses in accessing capital and other resources, such as business planning and continuing education.	1-2 Years, Ongoing		
Secure resources for small business marketing assistance and digital literacy programs.	3-4 Years, Ongoing		
Survey businesses engaged.	3-4 Years, Ongoing		
Develop and implement marketing assistance program for small businesses.	3-4 Years, Ongoing		

#### Metrics:

- Number of businesses engaged
- Quantitative and qualitative feedback from survey
- Number of businesses assisted by Revolving Loan Fund (and amount)
- Other funding awards and program completion(s)

#### Partners and Resources:

- COEDD
- Oklahoma Southeast
- Oklahoma Department of Commerce
- Economic Development Organizations
- Chambers of Commerce
- Main Street Programs
- Downtown Associations
- Convention and Visitor Bureaus
- Local Governments



## LEADERSHIP & REPRESENTATION

### Goal 1: Increase engagement with young talent and emerging local leaders.

	Timeframe	Progress Update	Achieved
Develop list of leadership programs, professional groups, and volunteer opportunities in the region.	1-2 Years		
Promote participation in leadership programs, professional groups, and volunteer opportunities throughout the region.	1-2 Years, Ongoing		
Identify and plan to address gaps in leadership opportunities.	1-2 Years		
Update and distribute list of leadership programs, professional groups, and volunteer opportunities in the region.	3-4 Years		
Identify and pair emerging leaders and mentors.	3-4 Years		
Survey participants and gather feedback.	3-4 Years, Ongoing		

#### Metrics:

- Quantitative and qualitative data from surveys.
- Number of participants
- Leadership roles filled

#### Partners and Resources:

- Elected officials and government staff
- Nonprofit organizations and civic groups
- Leadership programs and professional groups

## LEADERSHIP & REPRESENTATION

**Goal 2: Expand outreach to businesses, communities, and elected officials with an emphasis on awareness of programs, funding opportunities, professional development, and regional collaboration.**

	Timeframe	Progress Update	Achieved
Determine professional development needs for elected officials and government staff.	1-2 Years		
Develop and implement engagement plan to improve understanding of civics and increase community involvement, including feedback loop.	1-2 Years		
Create and maintain database of relevant programs and funding opportunities.	1-2 Years, Ongoing		
Create professional development plan and survey for participants.	1-2 Years		
Implement professional development training.	3-4 Years. Ongoing		
Convene partners for regional collaboration.	3-4 Years, Ongoing		
Analyze feedback and adjust engagement plan as necessary.	3-4 Years, Ongoing		

### Metrics:

- Number and type of businesses and community leaders engaged
- Quantitative and qualitative data from outreach feedback (program and funding participation, regional collaboration, etc.)
- Number of professional development offerings and participation

### Partners and Resources:

- COEDD
- Economic Development Organizations
- Chambers of Commerce
- Local government
- Business and industry partners

## FUNDING & INFRASTRUCTURE

### Goal 1: Strengthen regional healthcare services.

	Timeframe	Progress Update	Achieved
Identify locations, capacity, and services for medical providers, emergency services, and clinics in the region.	1-2 Years		
Evaluate HPSA score and identify most common needs such as urgent care, pharmacies, mental health care, and substance abuse resources.	1-2 Years		
Create (or build upon existing) database of healthcare options and wellness programs. Develop marketing plan to increase awareness.	1-2 Years		
Convene partners to develop and implement strategies to address the identified gaps and needs.	3-4 Years		
Work with regional partners to advance telehealth and telemedicine with increased broadband infrastructure.	3-4 Years		
Implement professional development training.	3-4 Years. Ongoing		
Convene partners for regional collaboration.	3-4 Years, Ongoing		
Implement marketing plan to increase awareness of healthcare options and wellness programs. Update and maintain database.	3-4 Years, Ongoing		
Re-evaluate HPSA score.	5+ Years		
Update asset map of locations, capacity, and services for medical providers, emergency services, and clinics in the region.	5+ Years		

#### Metrics:

- Healthcare providers per capita
- HPSA score
- Community health indicators

#### Partners and Resources:

- COEDD
- Local and regional hospitals
- Oklahoma State Health Department
- Oklahoma Healthy Communities
- Tobacco Settlement Endowment Trust (TSET)
- Telehealth/Telemedicine providers

## FUNDING & INFRASTRUCTURE

### Goal 2: Build capacity for the development of public/private partnerships, planning, and leveraging funding.

	Timeframe	Progress Update	Achieved
Develop educational materials for public officials and staff on infrastructure costs, planning, and prioritization.	1-2 Years		
Create and maintain guide to important programs and local, state, and federal funding opportunities.	1-2 Years, Ongoing		
Promote funding and service opportunities provided by COEDD.	1-2 Years, Ongoing		
Provide educational materials for public officials and staff, and create feedback loop to gather insights on how to improve the process	3-4 Years, Ongoing		

#### Metrics:

- Number of public education meetings held per year (virtual and in-person)
- Completion of quarterly update and revision to funding opportunity guide
- Number of grant requests filed for Community Development Block Grant (CDBG) and Rural Economic Action Plan (REAP) allocated in the region.

#### Partners and Resources:

- COEDD
- Business and industry partners
- Financial institutions
- Local government
- EDA

## FUNDING & INFRASTRUCTURE

### Goal 3: Expand quality broadband service access and affordability throughout the region.

	Timeframe	Progress Update	Achieved
Establish collaboration between communities to identify gaps in coverage and develop a regional approach to meet the challenges of broadband expansion.	1-2 Years, Ongoing		
Conduct funding scan to identify resources for broadband infrastructure.	1-2 Years, Ongoing		
Conduct survey of residents and businesses to gather further insights on broadband service strengths and challenges in the region.	1-2 Years		
Increase broadband connectivity and affordability across the region, focusing on underserved locations.	3-4 Years, Ongoing		
Increase broadband capacity to meet or exceed standards.	5+ Years		
Revise and reissue survey of residents and businesses to gather further insights on broadband service strengths and challenges in the region.	5+ Years		

#### Metrics:

- Number of regional broadband expansion collaboration meetings
- Percentage of households with computer/device access and broadband subscription
- Percentage of population underserved by broadband access
- Average number of internet providers per locality
- Local funding efforts, grants, and awards

#### Partners and Resources:

- COEDD
- Local government
- Broadband providers
- Rural Electric Coops
- EDA
- Oklahoma Department of Commerce
- Rural Broadband Expansion Council



# SOURCES AND LINKS

A number of sources were used to complete the data and analysis portions of the report. While not a comprehensive list, below are four sources that were relied on most heavily for specific insights. More information can be found from each source by clicking on each of the logo pictures attached. Additionally, more detailed information regarding industry, occupation, and regional data can be found in the Background Summary Report provided on the COEDD website. A full list of sources can also be found in this report along with detailed citing and comparable information regarding methodologies on data collection.

Emsi Labor Market Analytics and Economic data is a “labor market data company with headquarters in Boston and Moscow, Idaho, along with offices in the UK, Europe, India, and other global locations. Emsi serves clients across the US, the UK, Canada, the European Union, and the Asia-Pacific region, helping our clients solve a variety of problems.” Emsi uses countless data types, including Traditional Labor Market Information (LMI), Job Posting Analytics, Profile Data, and Compensation Data. For a full list of the 30+ data sources Emsi pulls from please see this link.



The United States Census Bureau has a mission to “serve as the nation’s leading provider of quality data about its people and economy.” Using survey sources like the American Community Survey (ACS), Census of Governments, Decennial Census, Economic Census, and others, the data provided by the Census Bureau allows for quality and timely data to all regions around the US.



The Bureau of Labor Statistics gives detailed and quality data on demographics, industries, business costs, occupations, and geography statistics for the nation as a whole, as well as the counties, states, and MSA’s around the country. Data pulled from the BLS for this report includes but is not limited to Labor Force Participation and Unemployment Rates, Hires and Separations, Earnings data, and Occupation outlooks.



The Oklahoma Tax Commission is “the Oklahoma state government agency that collects taxes and enforces the taxation and revenue laws of the state. The Commission is composed of three members appointed by the Governor of Oklahoma and confirmed by the Oklahoma Senate.” Tax data on the county level for multiple industries was pulled from this source.



# APPENDIX

COUNTY  
PROFILES

JAMBOARD  
SLIDES

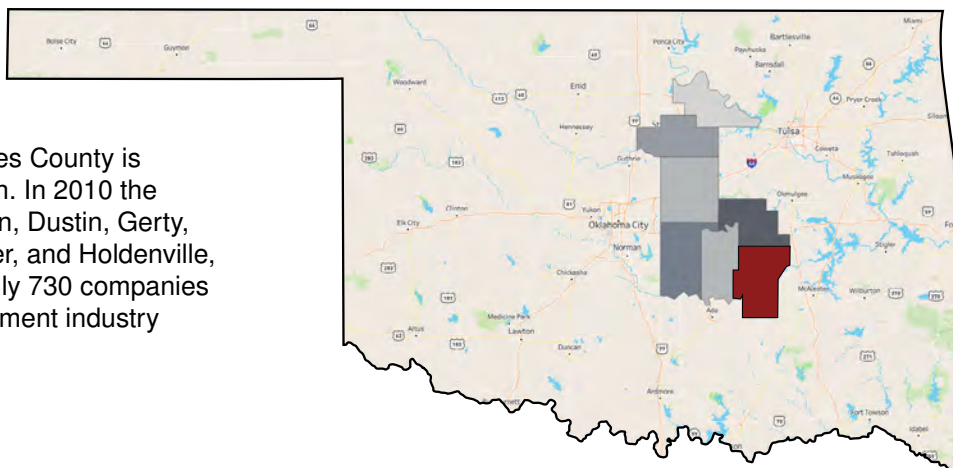
ACKNOWLEDGEMENTS

# HUGHES COUNTY

## Background

With a population of 13,321 in 2020, Hughes County is the 6th largest county in the COEDD region. In 2010 the incorporated towns included Atwood, Calvin, Dustin, Gerty, Lamar, Spaulding, Stuart, Wetumka, Yeager, and Holdenville, the county seat. Hughes County has roughly 730 companies employing 3,714 jobs, of which the Government industry sector, is the largest.

## Economy and Population Overview



**13,321**

*Population (2020)*

Population decreased by 271 over the last 5 years, but is projected to grow by 222 over the next 5 years

**3,714**

*Total Regional Employment*

Jobs decreased by 102 over the last 5 years but is projected to grow by 208 over the next 5 years

**\$39,400**

*Median Household Income*

Median household income in Hughes County is \$23,500 below the national median household income of \$62,800

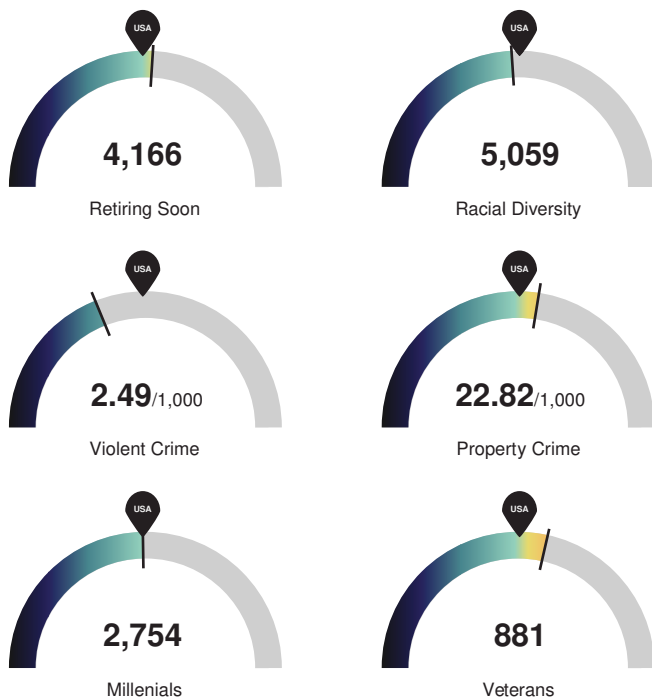
**48.98%**

*Labor Force Participation Rate (May 2021)*

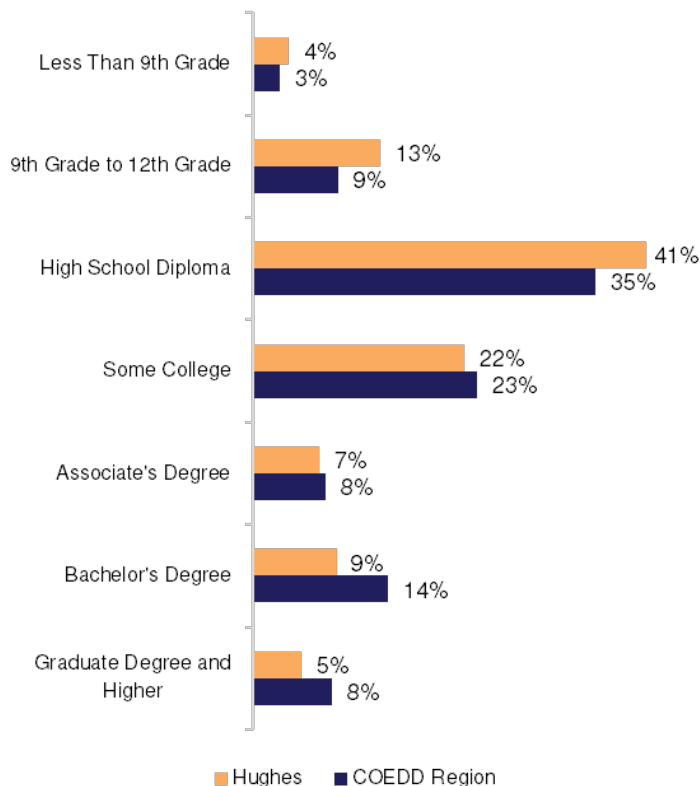
**4.79%**

*Unemployment Rate (May 2021)*

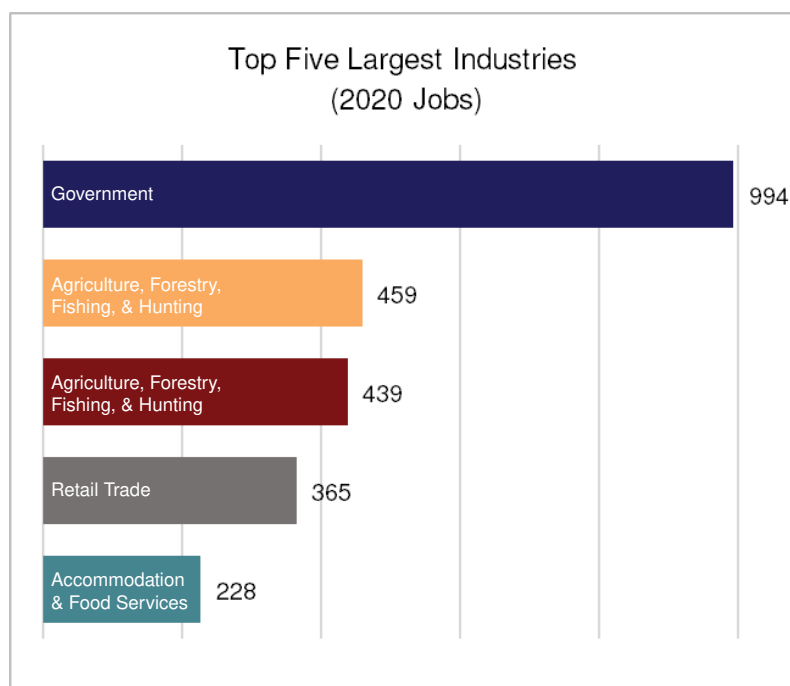
## Population Characteristics



## Educational Attainment



## Industry and Occupation Overview



### Industry Breakdown

More than a fourth of all jobs in Hughes County fall within the Government industry sector. The top occupation for this industry includes Educational Instructional and Library positions. That said, the top three fastest growing industries in the region are (1) Management of Companies and Enterprises, (2) Agriculture, Forestry, Fishing, and Hunting, and (3) Other Services. 67% of all jobs in Hughes comes from the top five industries displayed.

### Location Quotient (LQ) Breakdown

Agriculture, Forestry, Fishing, and Hunting industry sector jobs are heavily concentrated in Hughes County. With a 9.66 LQ, the region has 9.66 times more jobs in this industry than a typical location of its size. Animal production occupations make up the largest jobs for this industry. Additionally, Mining, Quarrying, and Oil and Gas Extraction industry jobs are highly clustered in the region. The COEDD region as a whole shares a very high LQ for this industry, with Hughes having the fifth highest LQ out of the seven counties in the region.

### Top 3 Industry Location Quotients (LQ)

9.66	Agriculture, Forestry, Fishing, and Hunting
7.15	Mining, Quarrying, and Oil & Gas Extraction
2.78	Management of Companies and Enterprises

### 733 Companies Employ Workers in Pawnee

Online profiles for your workers mention 733 companies as employers, with the top 3 appearing below. In the last 12 months, 360 companies in Hughes County, OK posted job postings, with the top 3 appearing below.

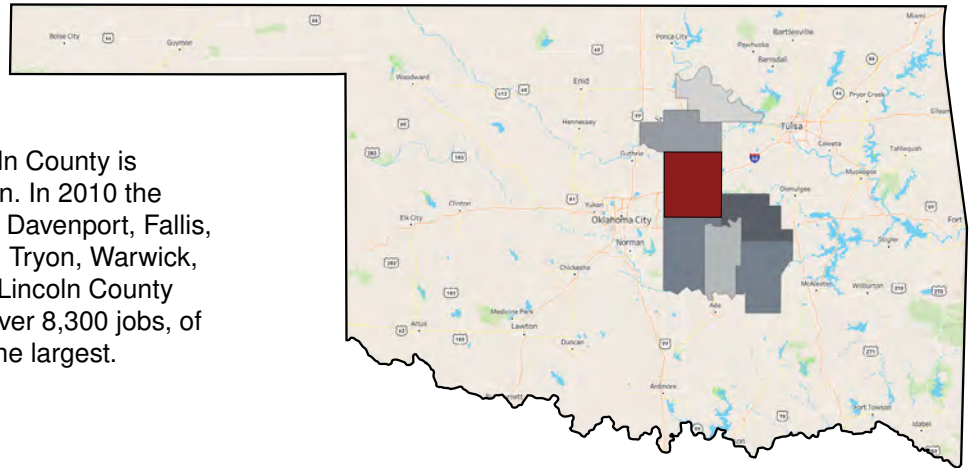
TOP COMPANIES	PROFILES
Holdenville General Hospital Found.	18
Correntions Corporation of America	16
Holdenville Public School	14

TOP COMPANIES POSTING	UNIQUE POSTINGS
Corecivic, Inc.	118
Wal-Mart, Inc.	95
Dollar General Corporation	76

# LINCOLN COUNTY

## Background

With a population of 35,042 in 2020, Lincoln County is the 3rd largest county in the COEDD region. In 2010 the incorporated towns included Agra, Carney, Davenport, Fallis, Kendrick, Meeker, Prague, Sparks, Stroud, Tryon, Warwick, Wellston, and Chandler (the county seat). Lincoln County has roughly 2,000 companies employing over 8,300 jobs, of which the Government industry sector, is the largest.



## Economy and Population Overview

**35,042**

*Population (2020)*

Population grew by 114 over the last 5 years and is projected to grow by 552 over the next 5 years

**8,313**

*Total Regional Employment*

Jobs grew by 171 over the last 5 years and are projected to grow by 447 over the next 5 years

**\$50,700**

*Median Household Income*

Median household income is \$12,200 below the national Median Household Income of \$62,800

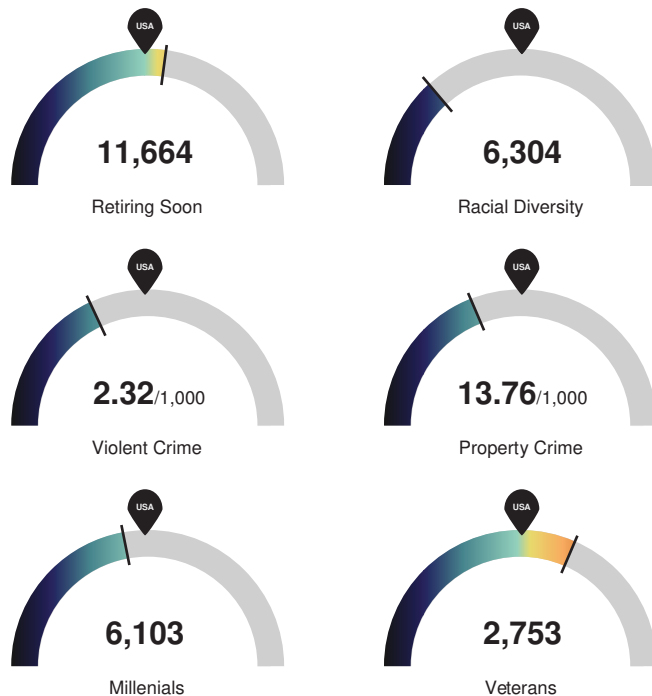
**56.47%**

*Labor Force Participation Rate (May 2021)*

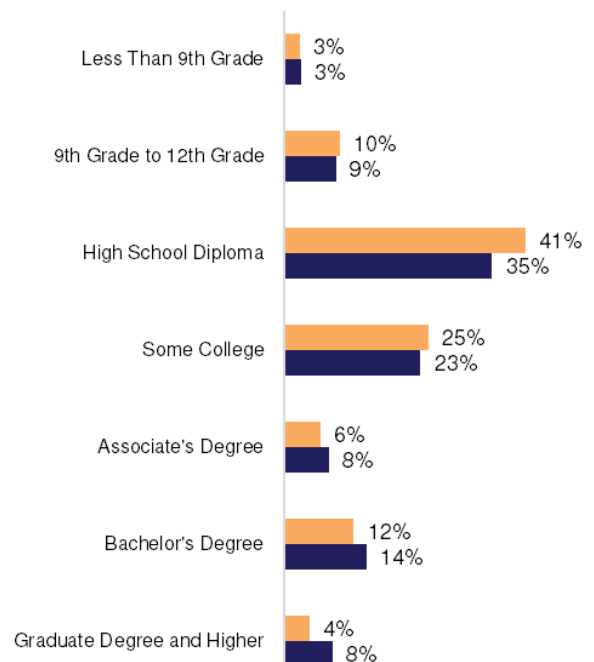
**3.29%**

*Unemployment Rate (May 2021)*

## Population Characteristics



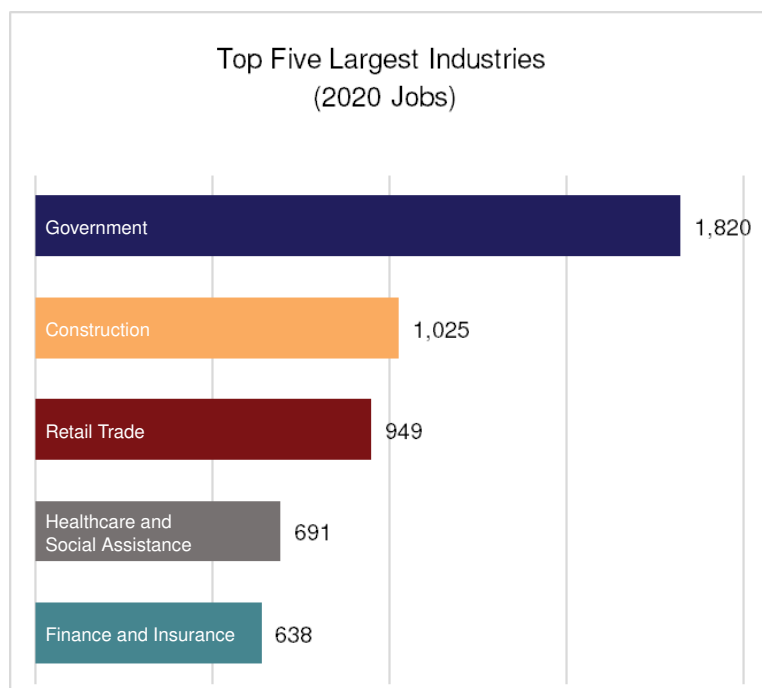
## Educational Attainment



Lincoln COEDD Region



## Industry and Occupation Overview



### Industry Breakdown

The Government industry sector is the largest in Lincoln County, followed by the Construction and Retail Trade industry. The top occupations in the county include Office and Admin Support, Sales and Related, and Construction and Extraction. That said, the top three fastest growing industries in the region are (1) Construction, (2) Finance and Insurance, and (3) Accommodation and Food Services. 62% of all jobs in Pawnee come from the top five industries displayed.

### Location Quotient (LQ) Breakdown

Mining, Quarrying, and Oil and Gas Extraction industry sector jobs are heavily concentrated in Lincoln County. With a 7.37 LQ, the region has 7.37 times more jobs in this industry than a typical location of its size. The COEDD region as a whole shares a very high LQ for this industry, with Lincoln having the fourth highest LQ out of the seven counties in the region. Additionally, Construction industry jobs are heavily concentrated in the area, with the top occupations for this industry being Plumbing, Heating, and Air-Conditioning Contractors and Site Preparation Contractors.

### Top 3 Industry Location Quotients (LQ)

**7.37**

*Mining, Quarrying, and  
Oil & Gas Extraction*

**2.14**

*Construction*

**1.83**

*Finance and Insurance*

### 2,007 Companies Employ Workers in Lincoln

Online profiles for your workers mention 2,007 companies as employers, with the top 3 appearing below. In the last 12 months, 538 companies in Lincoln County, OK posted job postings, with the top 3 appearing below.

TOP COMPANIES	PROFILES
National American Insurance Comp.	45
Sac & Fox Nation	44
Wal-Mart	31

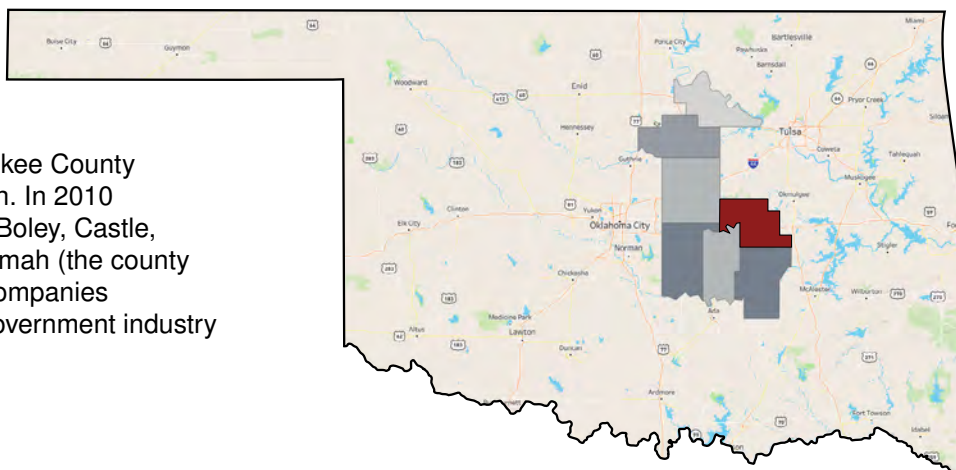
TOP COMPANIES POSTING	UNIQUE POSTINGS
Microsoft Corporation	183
Dollar General Corporation	163
U.S. Xpress, Inc.	102

# OKFUSKEE COUNTY

## Background

With a population of 12,032 in 2020, Okfuskee County is the smallest county in the COEDD region. In 2010 the incorporated towns included Bearden, Boley, Castle, Clearview, IXL, Paden, Weleetka, and Okemah (the county seat). Okfuskee County has roughly 500 companies employing over 2,800 jobs, of which the Government industry sector, is the largest.

## Economy and Population Overview



**12,032**

*Population (2020)*

Population decreased by 75 over the last 5 years but is projected to grow by 244 over the next 5 years.

**2,867**

*Total Regional Employment*

Jobs decreased by 23 over the last 5 years but are projected to grow by 281 over the next 5 years

**\$38,499**

*Median Household Income*

Median household income is \$24,400 below the national median household income of \$62,800

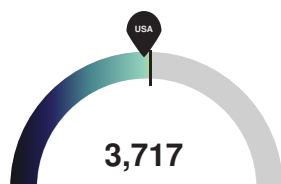
**45.26%**

*Labor Force  
Participation Rate  
(May 2021)*

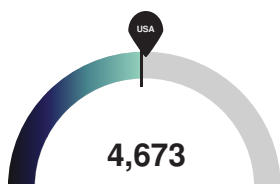
**4.21%**

*Unemployment  
Rate  
(May 2021)*

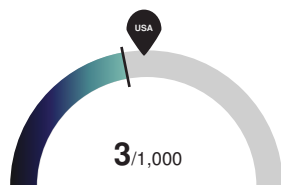
## Population Characteristics



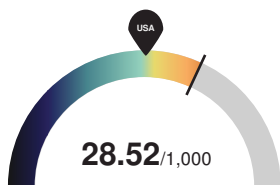
Retiring Soon



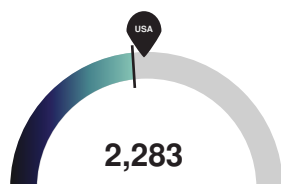
Racial Diversity



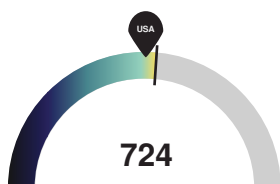
Violent Crime



Property Crime

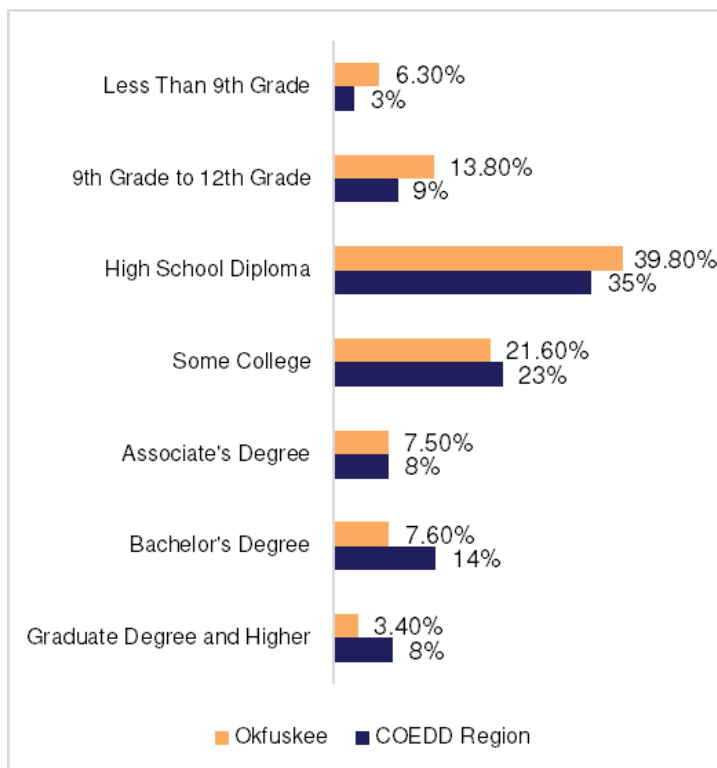


Millenials

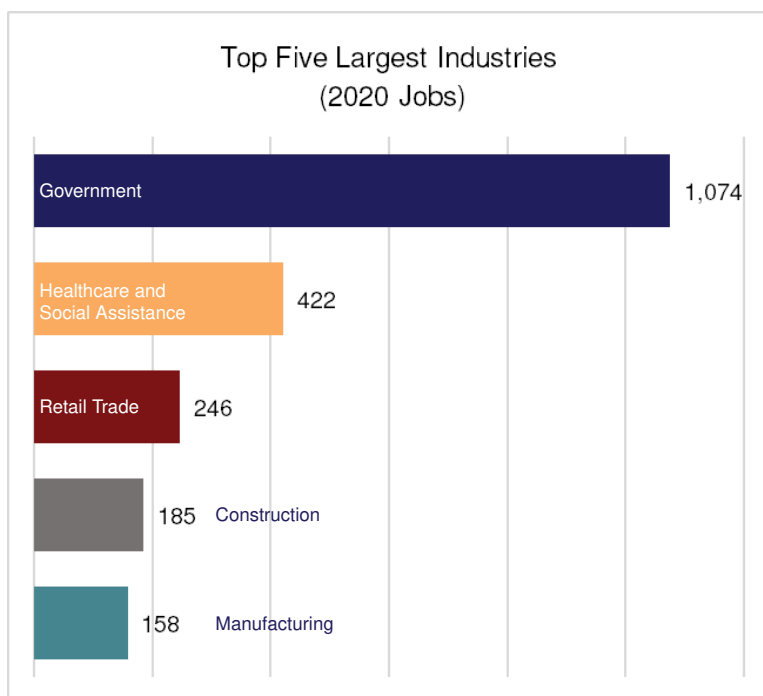


Veterans

## Educational Attainment



## Industry and Occupation Overview

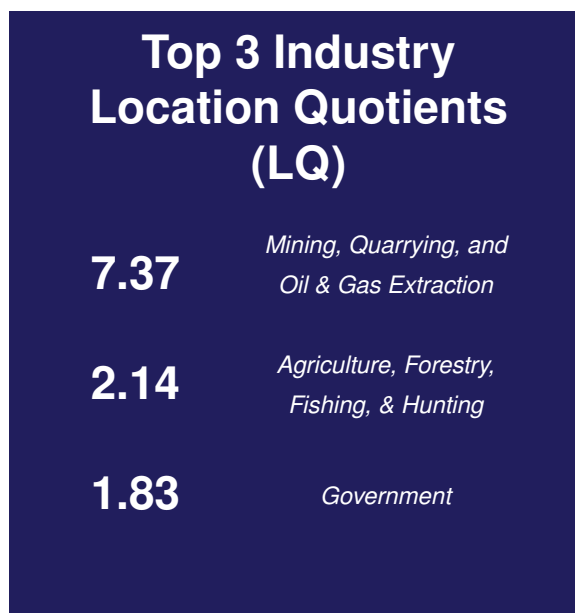


### Industry Breakdown

The Government industry sector is the largest in Okfuskee County, followed by the Health Care and Social Assistance industry. The top occupations in the county include Educational Instruction and Library as well as Office and Admin Support. That said, the top fastest growing industries in the region are Agriculture, Forestry, Fishing, and Hunting, and Mining, Quarrying, and Oil and Gas Extraction. Both industries saw increases of 25 jobs the past five years. 73% of all jobs in Okfuskee come from the top five industries displayed.

### Location Quotient (LQ) Breakdown

Mining, Quarrying, and Oil and Gas Extraction industry sector jobs are heavily concentrated in Okfuskee County. With a 7.75 LQ, the region has 7.75 times more jobs in this industry than a typical location of its size. The COEDD region as a whole shares a very high LQ for this industry, with Okfuskee having the third highest LQ out of the seven counties in the region. Additionally, Agriculture, Forestry, Fishing, and Hunting industry jobs are heavily concentrated in the area, with Animal Production occupations being the most common job for this industry.



### 576 Companies Employ Okfuskee Workers

Online profiles for your workers mention 576 companies as employers, with the top 3 appearing below. In the last 12 months, 305 companies in Okfuskee County, OK posted job postings, with the top 3 appearing below.

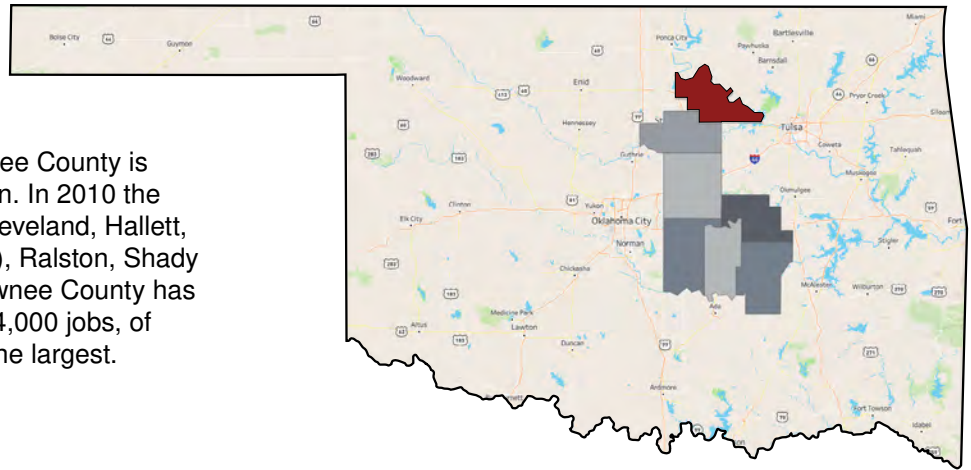
TOP COMPANIES	PROFILES
Muscogee Creek Nation	17
Okemah Public Schools	13
Thlopthlocco Tribal Town	8

TOP COMPANIES POSTING	UNIQUE POSTINGS
Dollar General Corporation	75
U.S. Xpress, Inc.	73
Integrus Health, Inc.	63

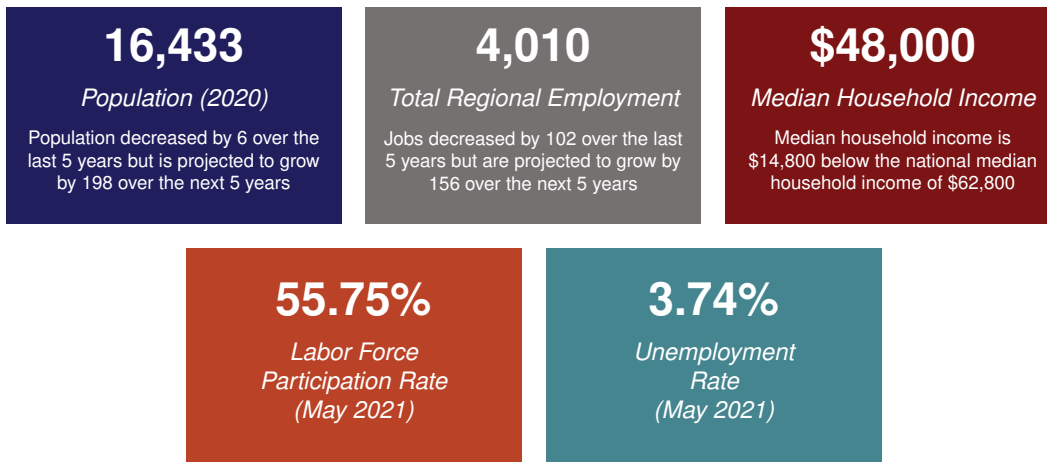
# PAWNEE COUNTY

## Background

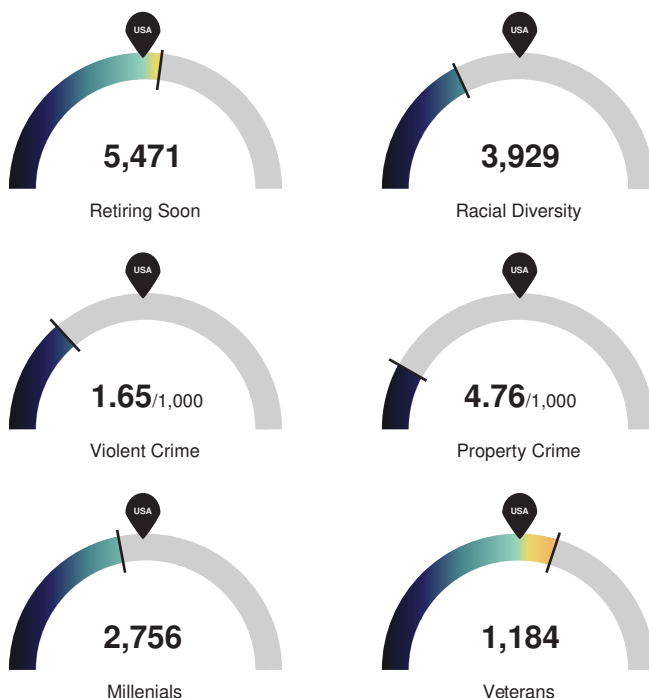
With a population of 16,433 in 2020, Pawnee County is the 4th largest county in the COEDD region. In 2010 the incorporated towns included Blackburn, Cleveland, Hallett, Jennings, Maramec, Pawnee (county seat), Ralston, Shady Grove, Skedee, Terlton, and Westport. Pawnee County has roughly 1,200 companies employing over 4,000 jobs, of which the Government industry sector, is the largest.



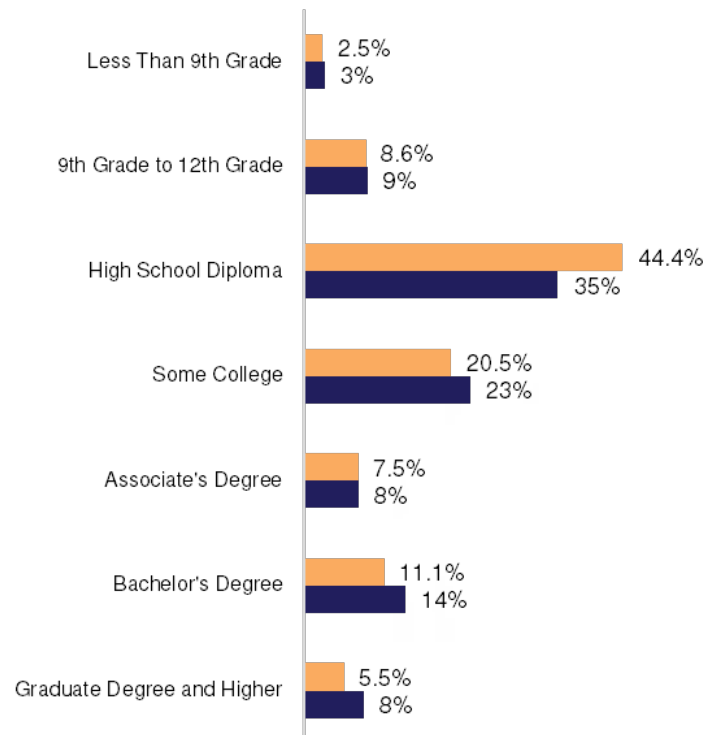
## Economy and Population Overview



## Population Characteristics

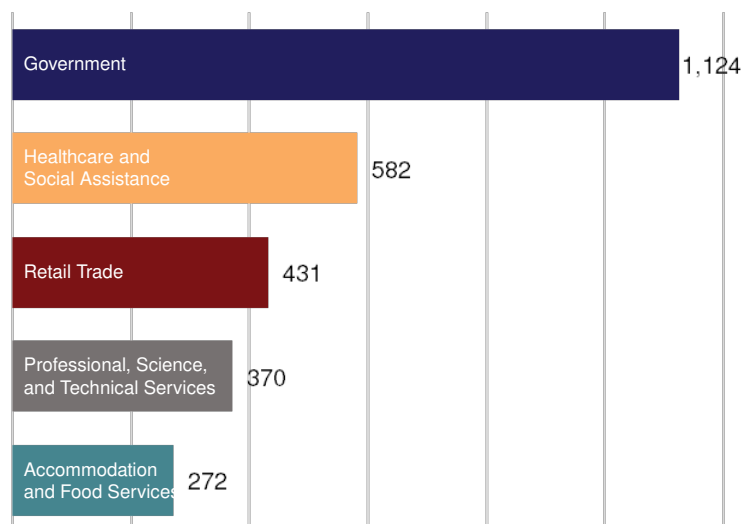


## Educational Attainment



## Industry and Occupation Overview

Top Five Largest Industries  
(2020 Jobs)



## Industry Breakdown

More than a fourth of all jobs in Pawnee County fall within the Government industry sector. The top occupation for this industry includes Educational Instructional and Library positions. That said, the top three fastest growing industries in the region are (1) Health Care and Social Assistance, (2) Professional, Scientific, and Technical Services, and (3) Accommodation and Food Services. 70% of all jobs in Pawnee come from the top five industries displayed.

## Location Quotient (LQ) Breakdown

Mining, Quarrying, and Oil and Gas Extraction industry sector jobs are heavily concentrated in Pawnee County. With a 9.23 LQ, the region has 9.23 times more jobs in this industry than a typical location of its size. The COEDD region as a whole shares a very high LQ for this industry, with Pawnee having the second highest LQ out of the seven counties in the region. Additionally, Utilities industry jobs are heavily concentrated in the area, with the top occupations for this industry being Natural Gas Distribution and Electric Bulk Power Transmission Control.

## Top 3 Industry Location Quotients (LQ)

9.23

*Mining, Quarrying, and  
Oil & Gas Extraction*

6.07

*Utilities*

1.84

*Government*

## 1,228 Companies Employ Workers in Pawnee

Online profiles for your workers mention 1,228 companies as employers, with the top 3 appearing below. In the last 12 months, 285 companies in Pawnee County, OK posted job postings, with the top 3 appearing below.

TOP COMPANIES	PROFILES
The Cimarron Telephone Co	34
Cleveland Public School District	32
Wal-Mart, Inc.	26

TOP COMPANIES POSTING	UNIQUE POSTINGS
State of Oklahoma	347
CRST International, Inc.	66
Dollar General Corporation	63

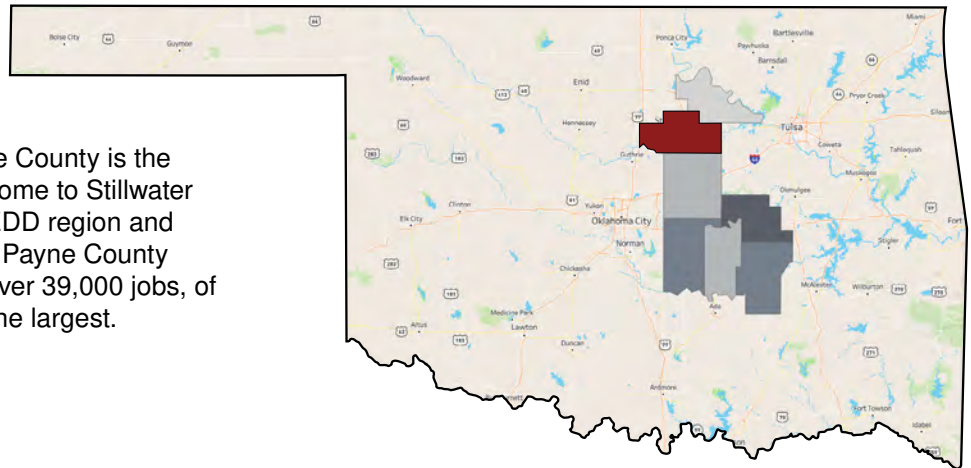


# PAYNE COUNTY

## Background

With a population of 83,088 in 2020, Payne County is the largest county in the COEDD region and home to Stillwater Oklahoma, also the largest city in the COEDD region and where Oklahoma State University resides. Payne County has roughly 7,800 companies employing over 39,000 jobs, of which the Government industry sector, is the largest.

## Economy and Population Overview



**83,088**

*Population (2020)*

Population grew by 1,725 over the last 5 years and is projected to grow by 5,435 over the next 5 years

**39,315**

*Total Regional Employment*

Jobs decreased by 148 over the last 5 years but are projected to grow by 901 over the next 5 years

**\$41,600**

*Median Household Income*

Median household income is \$21,200 below the national median household income of \$62,800

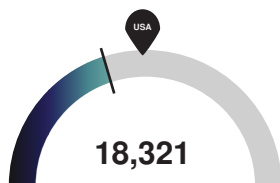
**51.77%**

*Labor Force Participation Rate (May 2021)*

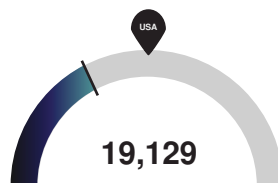
**3.18%**

*Unemployment Rate (May 2021)*

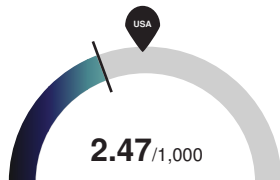
## Population Characteristics



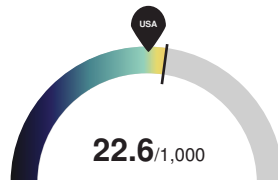
Retiring Soon



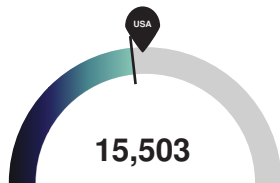
Racial Diversity



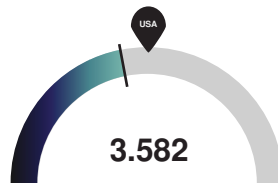
Violent Crime



Property Crime

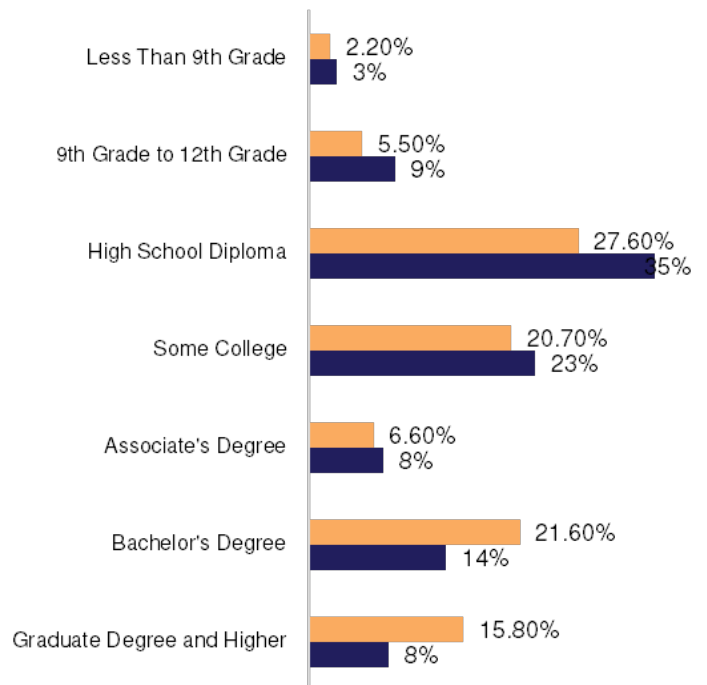


Millennials



Veterans

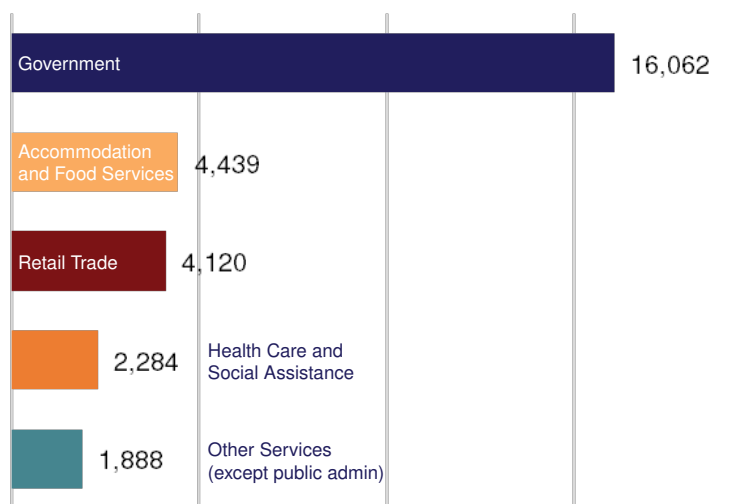
## Educational Attainment



Payne COEDD Region

## Industry and Occupation Overview

Top Five Largest Industries  
(2020 Jobs)



## Industry Breakdown

The Government industry sector, comprising of education occupations, dominates all jobs in Payne County. Postsecondary teachers are the most common occupation within this industry. That said, the Government industry is also by far the fastest growing industries in the county, followed by Real Estate and Rental and Leasing. 41% of all jobs in Payne come from the Government industry, and 73% of all jobs come from the top five industries displayed.

## Top 3 Industry Location Quotients (LQ)

3.25

Mining, Quarrying, and  
Oil & Gas Extraction

2.68

Government

1.49

Accommodation  
and Food Services

## Location Quotient (LQ) Breakdown

Mining, Quarrying, and Oil and Gas Extraction industry sector jobs are heavily concentrated in Payne County. With a 3.25 LQ, the region has 3.25 times more jobs in this industry than a typical location of its size. The COEDD region as a whole shares a very high LQ for this industry, with Payne having the second lowest highest LQ out of the seven counties in the region. Additionally, Government industry jobs are heavily concentrated in the area, as the addition of Oklahoma State University brings many education and library occupations.

## 7,835 Companies Employ Workers in Payne

Online profiles for your workers mention 7,835 companies as employers, with the top 3 appearing below. In the last 12 months, 2,290 companies in Payne County, OK posted job postings, with the top 3 appearing below.

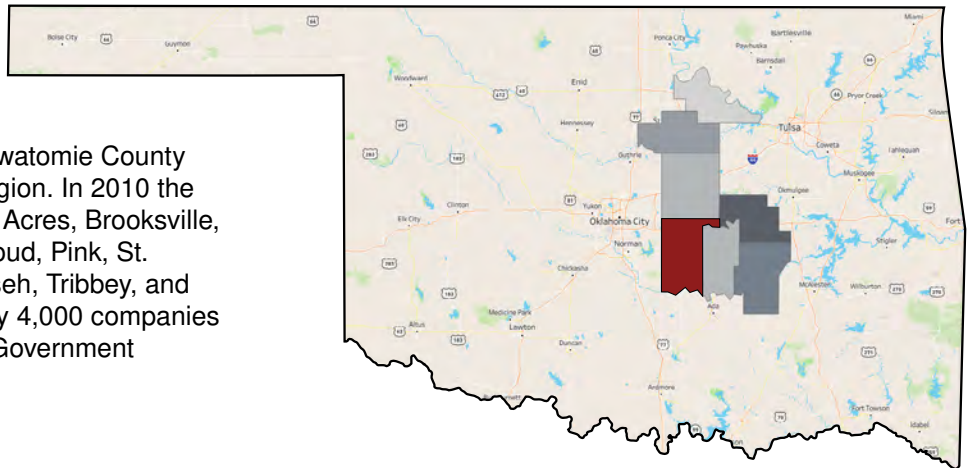
TOP COMPANIES	PROFILES
Oklahoma State University	3,495
Stillwater Medical Center	328
Stillwater Public Schools	318

TOP COMPANIES POSTING	UNIQUE POSTINGS
Oklahoma State University	714
Wal-Mart	191
U.S. Xpress, Inc.	162

# POTTAWATOMIE COUNTY

## Background

With a population of 73,087 in 2020, Pottawatomie County is the 2nd largest county in the COEDD region. In 2010 the incorporated towns included Asher, Bethel Acres, Brooksville, Earlsboro, Johnson, Macomb, Maud, McCloud, Pink, St. Louis, Shawnee (the county seat), Tecumseh, Tribbey, and Wanette. Pottawatomie County has roughly 4,000 companies employing over 25,500 jobs, of which the Government industry sector, is the largest.



## Economy and Population Overview

**73,087**

*Population (2020)*

Population grew by 1,608 over the last 5 years and is projected to grow by 1,884 over the next 5 years

**25,504**

*Total Regional Employment*

Jobs decreased by 739 over the last 5 years but are projected to grow by 1,207 over the next 5 years

**\$49,300**

*Median Household Income*

Median household income is \$13,600 below the national median household income of \$62,800

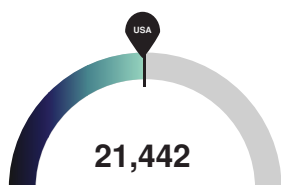
**55.52%**

*Labor Force Participation Rate (May 2021)*

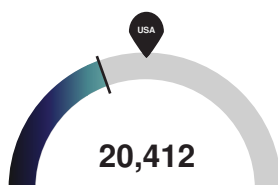
**3.60%**

*Unemployment Rate (May 2021)*

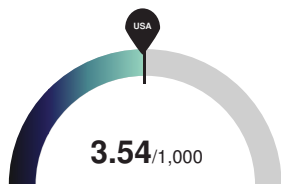
## Population Characteristics



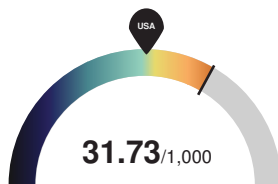
Retiring Soon



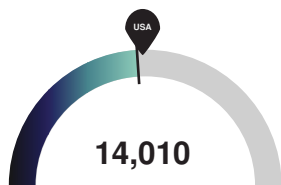
Racial Diversity



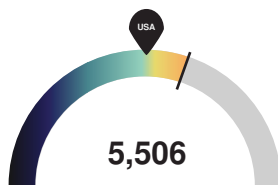
Violent Crime



Property Crime

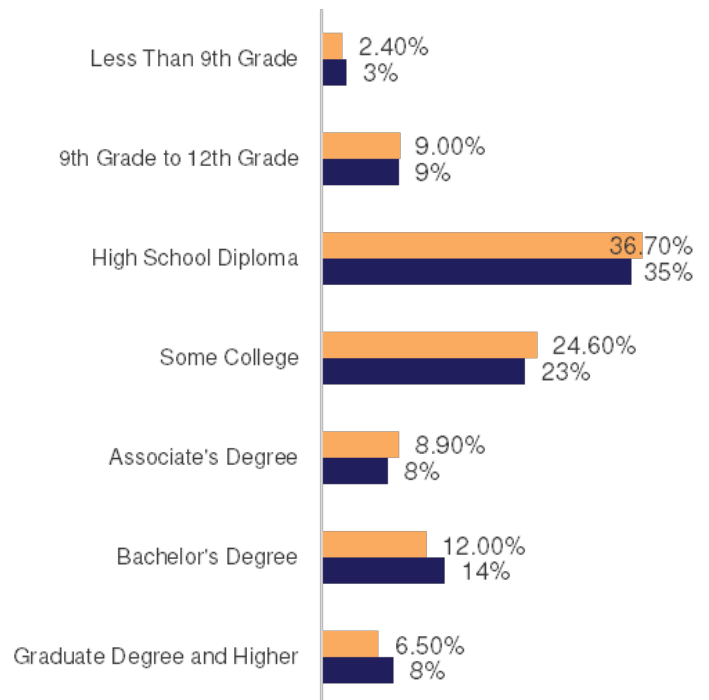


Millennials



Veterans

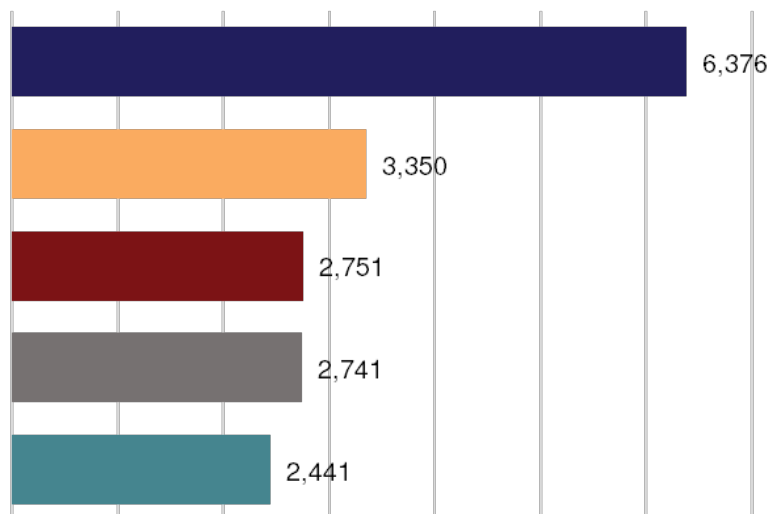
## Educational Attainment



■ Pottawatomie ■ COEDD Region

## Industry and Occupation Overview

Top Five Largest Industries  
(2020 Jobs)



### Industry Breakdown

The Government industry sector is the largest in Pottawatomie County, followed by the Health Care and Social Assistance industry. The addition of Oklahoma Baptist University, Seminole State College, Gordon Cooper Technology Center and other schools in the county creates many educational occupations that fall within the Government industry. That said, the top fastest growing industries in the region are Health Care and Social Assistance and Professional, Scientific, Tech. Services. 69% of all jobs in Pottawatomie come from the top five industries displayed.

### Location Quotient (LQ) Breakdown

Mining, Quarrying, and Oil and Gas Extraction industry sector jobs are heavily concentrated in Pottawatomie County. With a 1.96 LQ, the region has 1.96 times more jobs in this industry than a typical location of its size. The COEDD region as a whole shares a very high LQ for this industry, with Pottawatomie having the lowest LQ out of the seven counties in the region. Additionally, Government industry jobs are heavily concentrated in the area, with Educational Instruction and Library positions being the most common job for this industry.

### Top 3 Industry Location Quotients (LQ)

**1.96**

*Mining, Quarrying, and  
Oil & Gas Extraction*

**1.64**

*Government*

**1.52**

*Educational Services*

### 3,975 Companies Employ Pottawatomie Workers

Online profiles for your workers mention 3,975 companies as employers, with the top 3 appearing below. In the last 12 months, 1,097 companies in Pottawatomie County, OK posted job postings, with the top 3 appearing below.

TOP COMPANIES	PROFILES
Citizen Potawatomi Nation	259
Oklahoma Baptist University Autho	205
United States Department of the A	119

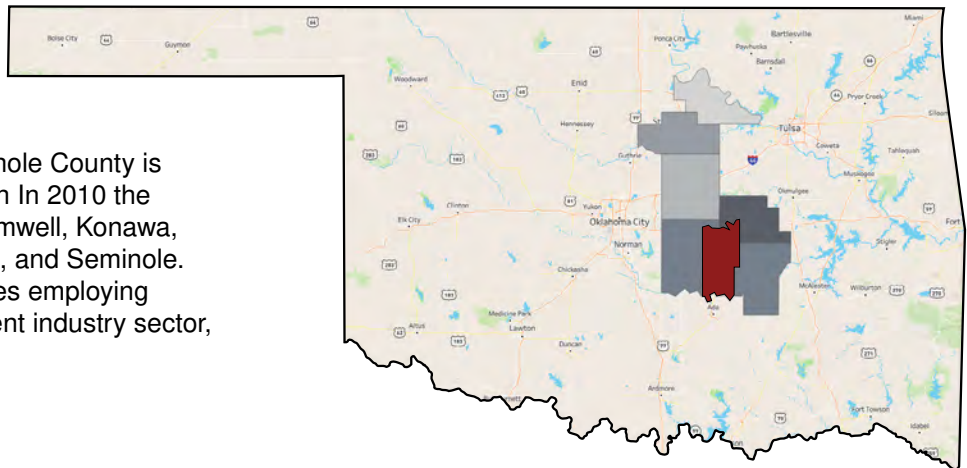
TOP COMPANIES POSTING	UNIQUE POSTINGS
SSM Health Care Corporation	292
AdventHealth	198
Dollar General Corporation	147

# SEMINOLE COUNTY

## Background

With a population of 24,101 in 2020, Seminole County is the 4th largest county in the COEDD region. In 2010 the incorporated towns included Bowlegs, Cromwell, Konawa, Lima, Sasakwa, Wewoka (the county seat), and Seminole. Seminole County has over 1,000 companies employing roughly 8,000 jobs, of which the Government industry sector, is the largest.

## Economy and Population Overview



**24,101**

*Population (2020)*

Population decreased by 1,298 over last 5 years; projected to decrease by 696 over the next 5 years

**7,996**

*Total Regional Employment*

Jobs decreased by 265 over the last 5 years but are projected to grow by 220 over the next 5 years

**\$39,400**

*Median Household Income*

Median household income is \$23,500 below the national median household income of \$62,800

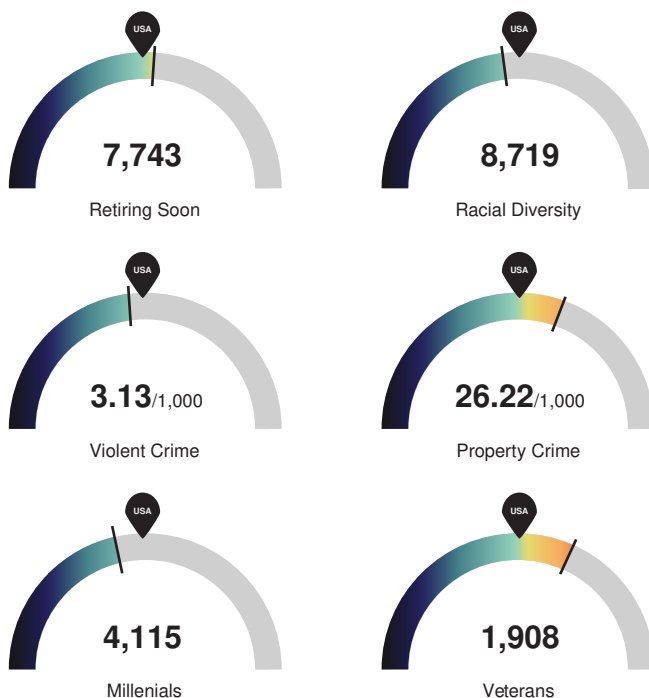
**47.96%**

*Labor Force Participation Rate (May 2021)*

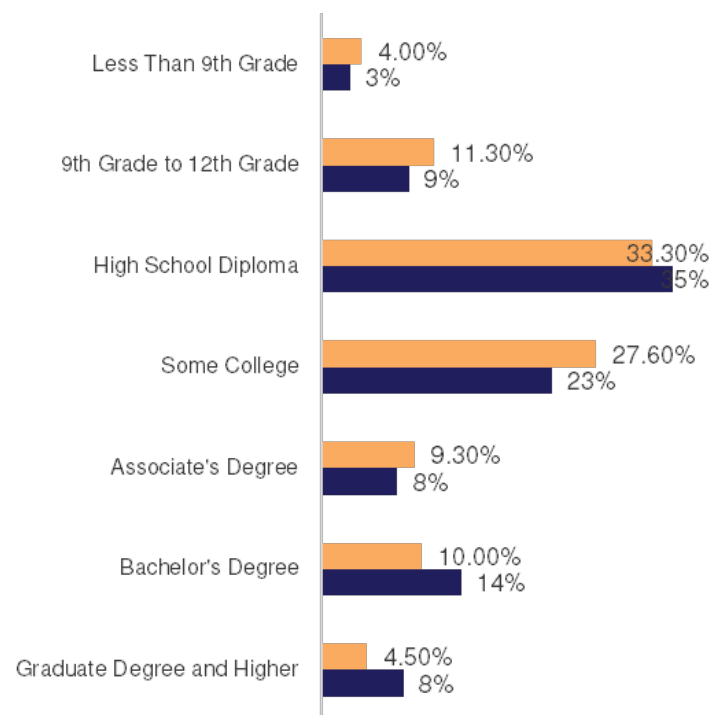
**4.74%**

*Unemployment Rate (May 2021)*

## Population Characteristics



## Educational Attainment

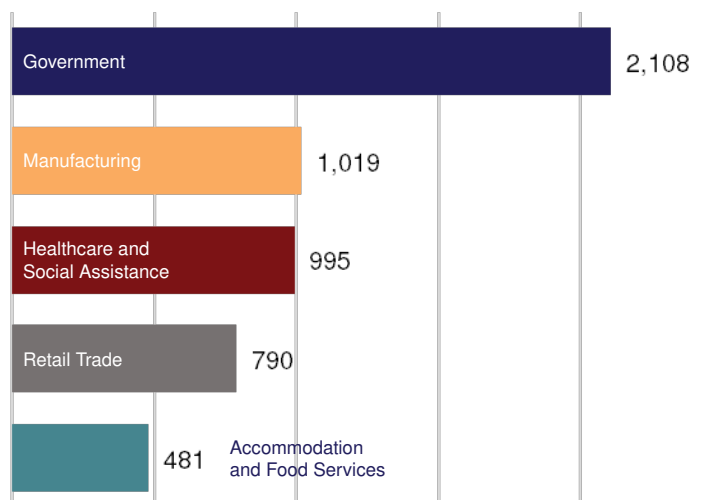


■ Seminole ■ COEDD Region



## Industry and Occupation Overview

Top Five Largest Industries  
(2020 Jobs)



## Industry Breakdown

The Government industry sector is the largest in Seminole County, followed by Manufacturing industry. The top occupations in the county include Office and Admin Support and Production. That said, the top fastest growing industry in the region is Transportation and Warehousing. This industry saw roughly 250 new jobs in the past 5 years. 67% of all jobs in Seminole come from the top five industries displayed.

## Location Quotient (LQ) Breakdown

Mining, Quarrying, and Oil and Gas Extraction industry sector jobs are heavily concentrated in Seminole County. With a 12.44 LQ, the region has 12.44 times more jobs in this industry than a typical location of its size. The COEDD region as a whole shares a very high LQ for this industry, with Seminole having the highest LQ out of the seven counties in the region. Additionally, Utilities industry jobs are heavily concentrated in the area, with Natural Gas Distribution and Electric Bulk Power Transmission Control occupations being the most common jobs for this industry.

## Top 3 Industry Location Quotients (LQ)

12.44	Mining, Quarrying, and Oil & Gas Extraction
5.24	Utilities
1.73	Government

## 1,083 Companies Employ Seminole Workers

Online profiles for your workers mention 1,083 companies as employers, with the top 3 appearing below. In the last 12 months, 476 companies in Seminole County, OK posted job postings, with the top 3 appearing below.

TOP COMPANIES	PROFILES
The Seminole Nation of Oklahoma	39
Seminole Public Schools Credit Un.	34
Seminole State College of Florida	34

TOP COMPANIES POSTING	UNIQUE POSTINGS
Community Health Systems, Inc.	101
Dollar General Corporation	98
Wal-Mart, Inc.	80

## JAM BOARD SLIDES

SWOT Analysis and Priority-Setting Stakeholder Input:

### STRENGTHS AND WEAKNESSES

Open spaces	location between Oklahoma City and Tulsa	Highway System	Baptist university	largest concentration of historically black communities	diversity
Adding manufacturing and technology	Stability	political positioning	low utility cost	interstate system	ability for easy commuters
skilled labor for key growth industries - medical, trucking, etc.	Water ports	Strong Vocational & Technology Training	cost of living below national average	festivals and events	balloon fest
finger on the pulse	AP cert	global draw	Music network	museums	assets the tribal communities bring - hospitals, etc.
tribal relationships	state incentives	stillwater and osu from entertainment standpoint	casinos	route 66	rural electric coops bringing broadband
					central to the nation
					baptist u adding masters
					cultural heritage
					model for career techs

sales tax or utility rates to get funds for infrastructure	isolated without resources/capacity	barriers to sales tax assets
street repairs	funding for blight elimination	towns that don't have a Walmart are struggling
rising utility costs due to mandates	no highway on Main Street	infrastructure
Rural Healthcare	emergency services coverage	Needs for broadband

### OPPORTUNITIES AND THREATS

#### BREAKOUT #2

population shifts	representation and resources based on population	work within the diversity - diverse leadership	money - funding and resources	capacity & capital	mentoring	will the small banks and other services be sustainable	cannabis
Placemaking	adaptive reuse	new business in old buildings	downtown revitalization	addressing and leveraging history/culture	cost of rehab of downtown buildings	telecommunications	changes in human habits of connection
higher ed resources/access	STEM programming	Workforce up-skilling	supporting career tech	training for the future jobs	+jobs in cannabis	course availability/strengthening curriculum	teacher recruitment
							ecommerce trends
							lagging behind tech
							automation

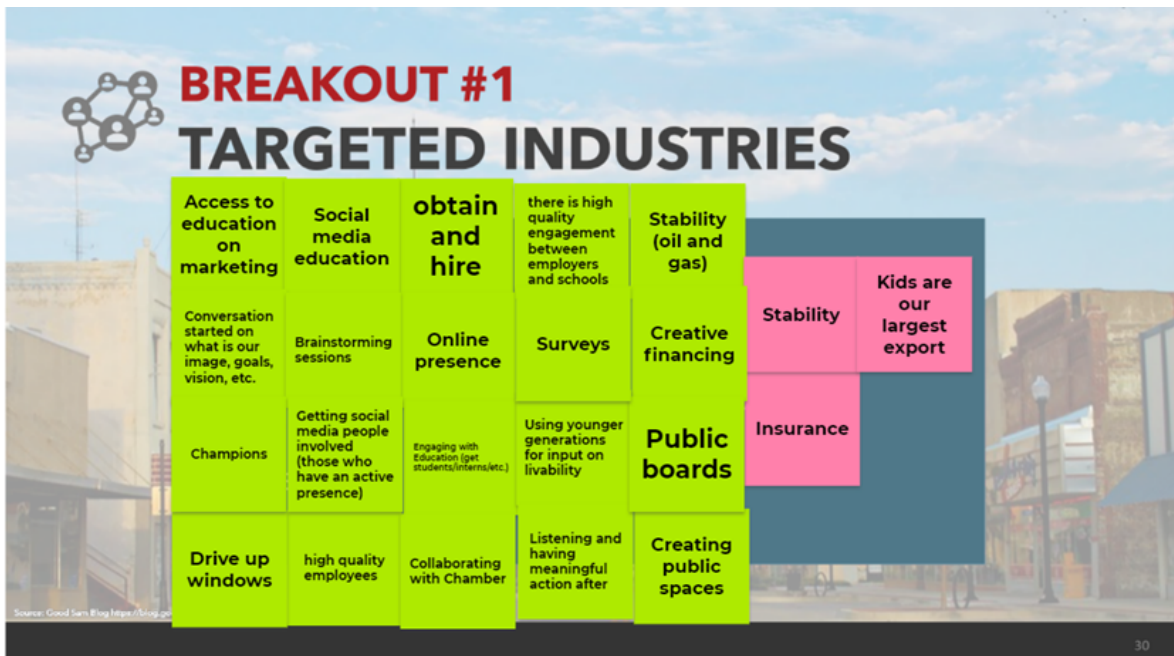
# RESILIENCE AND PRIORITIES

## BREAKOUT #3



27

Stakeholder input on targeted industries, education and workforce, infrastructure, healthcare, environment, and housing:



30



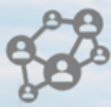
## BREAKOUT #2

# EDUCATION, WORKFORCE

Apprenticeships	Involvement of young people in community clubs	Passionate educators	Teaching soft skills to students	More involvement with kids and skilled labor (show them opportunities)	Life Lesson Program - involvement with kids	Stigma for Tech Schools
Breaking poverty cycle	Getting tech schools involved in junior high (educating them on opportunities)	Work on transition of mentality/stigma of different education	Working with Tech Centers - more collaboration	Practice interviews/teaching life skills	Exposure to tech/math/etc.	Kids are uncertain on educational opportunities
Supporting programs that involve kids	Making programs/events fun for kids	Skill building programs for students	Increasing STEM	Dual enrollment in CTE and HS	Shortages of skilled labor	

Source: Good Sam Blog <https://blog.goodsam.com/what-is-a-re-act/> Social Policy Research Center

31



## BREAKOUT #3

# INFRASTRUCTURE, HEALTHCARE, ENVIRONMENT, HOUSING

Taking advantage of current opportunities	Education on infrastructure costs	Funding (available and affordable)
Shared common goals	Education for leadership/citizens on costs for infrastructure	
Mentorship with experienced leadership and potential leadership	Scan of potential leaders	Mindset to hiring people who want to collaborate, coordinate, and push community forward
Small communities cannot afford what they currently have in liabilities		
No long term planning on infrastructure assets		
Matching components for grants		

Source: Good Sam Blog <https://blog.goodsam.com/what-is-a-re-act/> Social Policy Research Center

32

## ACKNOWLEDGEMENTS

COEDD appreciates the support and participation of the following stakeholders in the development of this Comprehensive Economic Development Strategy.

Kent Bradley, Board Chairman  
Payne County

Bruce Johnson, Director  
Cushing Economic Development

Mark Mosley, City Manager  
City of Wewoka

Bob Ernst, City Manager  
City of Perkins

James Melson, City Manager  
City of Chandler

Philip Kelly, Police Chief/Interim City Manager  
City of Yale

Randy Thomas, Commissioner  
Pottawatomie County

Jane Schuster, Trustee  
Bethel Acres

John Massad, Mayor  
City of Holdenville

David Zeller, Town Administrator  
City of Maud

Lee Doolen, Commissioner  
Lincoln County

Buck Day, City Manager  
City of McLoud

Jim Greff, City Manager  
City of Prague

Jim Stokes, City Manager,  
Tecumseh

Bob Pearman, City Manager  
City of Stroud

Jim Collard, Director of Economic Development  
Citizen Band Potawatomi Tribe

Danny Wilson, Commissioner  
Okfuskee County

Clifton Taylor, Commissioner  
Seminole County

Jayne Hughes, City Manager  
City of Okemah

Tim Coffey, Interim Town Administrator  
City of Konawa

Clinton Stout, Police Chief/Acting City Manager  
City of Cleveland

Steve Saxon, City Manager  
City of Seminole

Jerry Skidgel, Commissioner  
Pawnee County

Roberta Davis and Staff  
Holdenville Chamber of Commerce

Mark Brumfield, Interim Mayor  
City of Pawnee



# COEDD

A REGIONAL COUNCIL OF GOVERNMENT

**Central Oklahoma Economic Development District**

400 N. Bell, Shawnee, Oklahoma 74804

(405) 273-6410 | [director@coedd.net](mailto:director@coedd.net)

[www.coedd.net](http://www.coedd.net)