



OWASSO ECONOMIC DEVELOPMENT STRATEGY



February 2018

Prepared for:
City of Owasso, Oklahoma

ECONOMIC DEVELOPMENT
STRATEGIC PLANNING

TABLE OF CONTENTS

Plan Purpose..... 1

Planning Process 1

Strategic Initiatives..... 1

- A. Strengthening Owasso’s Value Proposition 2
 - A.1. Workforce Owasso 2
 - A.2. Incentive Guidelines & Policy 3
 - A.3. Industrial/Office Parks 4
 - A.4. Advocacy 5
- B. Growing & Recruiting Business to Owasso 6
 - B.1. Medical Cluster Expansion 6
 - B.2. Expand & Attract Businesses 7
 - B.3. Entrepreneurship & Incubation 9
- C. Marketing Owasso 10
 - C.1. Owasso Identity 10
 - C.2. Owasso’s Online Presence 11

Plan Components 12

Accountable Implementation 12

- A. Minimum Specifications for Successful Implementation 12
- B. Organizing and Reporting 13
- C. Communications 13

Acknowledgements..... 14

PLAN PURPOSE

Owasso is one of the most desirable communities for residents in the Tulsa region. Quality housing and robust retail growth have been a focus for community leaders. To sustain growth of retail and lifestyle amenities, it is important to intentionally work on a more developed community to accommodate opportunities for not only living and playing in Owasso, but also quality employment opportunities. Employment in basic industries - those industries that bring new wealth in a community by selling a product or service outside the region - pay higher wages for skilled workers. Basic industries located in Owasso increases daytime population so that more money is spent locally for retail, restaurants and local services.

The purpose of this plan for Owasso economic development efforts is to strategically invest resources so that we sustain and perpetuate opportunities for Owasso citizens. By diversifying job opportunities Owasso will suffer less negative impact from cyclical economic challenges.

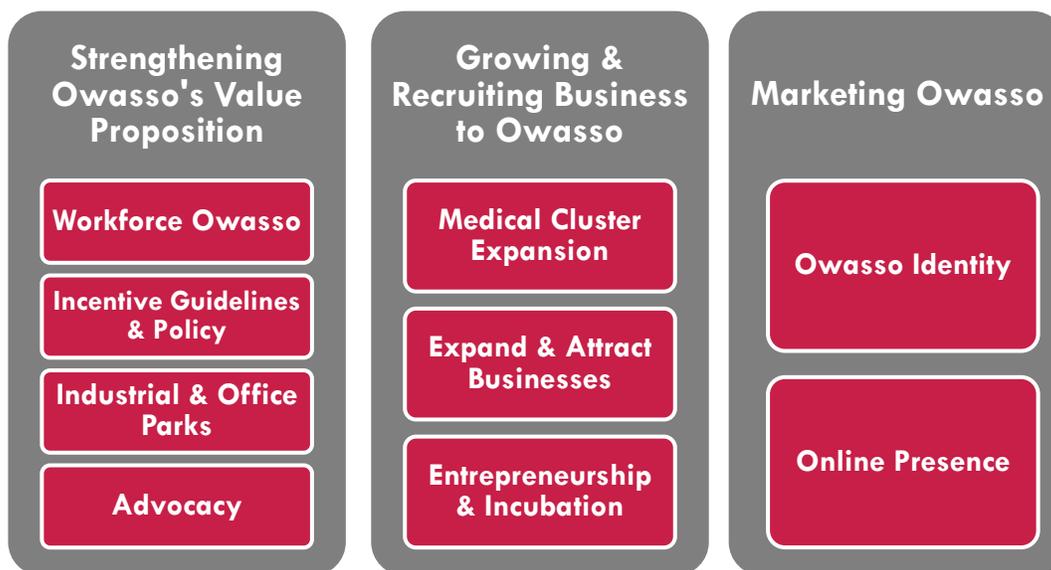
We also value how the community can be involved and informed in these efforts. Our vision is for all pieces to really work together – to communicate and collaborate. This plan is not a city government plan; it involves teams of committed partners making a positive impact for growing Owasso’s economy collectively.

PLANNING PROCESS

The development of this strategic plan covered three phases: first, an in-depth analysis of the current situation; second, robust engagement to define strategic priorities; and third, initiative-focused work sessions to define specific tactics and teams for each strategic initiative. 65 people were involved in the planning process, encompassing elected officials at the local, county and state levels; members of the Owasso Economic Development Authority and Owasso Chamber of Commerce; staff from the city, Owasso Chamber, Tulsa Regional Chamber; real estate developers and brokers; healthcare; educational institutions, workforce development and many other economic development resources partners.

STRATEGIC INITIATIVES

The Owasso Economic Development Strategy encompasses nine strategic initiatives, organized into three related categories:



A. STRENGTHENING OWASSO'S VALUE PROPOSITION

During the planning process, the Competitiveness Assessment and subsequent focus groups with local employers revealed gaps and liabilities in Owasso's asset offerings that are critical to Owasso's success in growing and attracting businesses in Owasso. If these issues are not addressed, the work of the other two strategic initiative categories will encounter more obstacles and waste resources.

A.1. Workforce Owasso

GOAL

Network of employers, resources and service providers for recruiting and retaining a workforce of excellence in Owasso, Oklahoma.

WHY IMPORTANT?

Local employers provided resounding input on the critical factor of attracting and retaining skill and unskilled candidates to work at their Owasso operations. By convening "Workforce Owasso" it demonstrates not only proactive efforts for listening to employer needs, it shows that Owasso is interested in acting on solutions that support employer needs.

Nationally, talent is the leading driver for business growth and competitiveness through innovation. Communities that are focused on helping local employers access talent, as well as partner on upgrading skills, are growing through talent capacity. These communities are also gaining attention outside of the marketplace as potential areas for new locations because they are addressing employer talent needs.

TACTICS – WORKFORCE OWASSO

- Engage employers
 - Catalogue human resource contacts.
 - Assemble team.
 - Invite to participate.
 - Champion for "Workforce Owasso" by industry sector.
 - Frame value proposition for "Workforce Owasso".
 - Establish "Workforce Owasso".
- Regular meetings with Workforce Owasso meetings
 - Employer-driven topics and dialogue of substance.
 - Define meeting frequency, time of day, and length.
- Research workforce resources and service providers
 - Assemble and document.
 - Research other workforce programs.
 - Open doors for school-to-work efforts.
- Workforce data mining
 - Understand local, regional, state and national trends,
 - What data do local employers want.
 - Establish regular update schedule of data.
- Identify needs and issues for local employers
 - Survey or other input mechanism.

- Online access to information for local employers
 - Owasso Economic Development website with information and links to workforce resources and data.
 - Additional other engagement tools for “Workforce Owasso” members: Sharepoint, private LinkedIn Group, database.

A.2. Incentive Guidelines & Policy

GOAL

Establish incentive guidelines and policy.

WHY IMPORTANT?

Incentives can be a highly controversial topic for communities, while incentives only serve to “tip the scale” for a business location decision when all factors are equal among competing communities. Strategic communities utilize incentives as tools to close a deal – *if* it helps the community to achieve what economic growth they are trying to influence AND only *if needed*.

The importance of this initiative is to thoughtfully consider how incentives will help Owasso advance efforts towards what the community needs to achieve – for the short and long-term. Because we have limited resources we want to make smarter investments, utilizing these limited resources for maximum return on investment.

TACTICS – INCENTIVE GUIDELINES & POLICY

- Research
 - Document current and past incentives awarded by Owasso. Assess successes and failures.
 - Research what other cities and economic development organizations have done/are doing with incentives. Understand best practices.
 - Conduct retail market analysis to document gap analysis.
- Document incentive “tool box” (eligibility, application process, contacts, etc.) for Owasso projects, including but not limited to:
 - Federal incentive programs.
 - State incentive programs.
 - Workforce development/hiring.
 - Tribes.
- Prepare summary document of all research to inform preparation of draft goals
- Define draft goals for incentive projects
 - What trying to achieve with incentives.
 - Where are biggest gaps in available incentives (avoid duplication).
 - Eligible areas to incent.
- Consult private-sector on draft goals
- Develop incentive criteria
 - i.e. “but for this incentive the project will not occur” language
 - Economic impact to measure return on investment
- Identify funding sources

- Develop guidelines for eligibility
 - Earned incentives versus claw-backs.
 - Incentive level based on criteria.
 - Pre-application worksheet.
 - Project incentive application.
 - Corresponding project evaluation relative to criteria.
- Approval of Incentive Guidelines/Policy
 - Submit to Owasso Economic Development Authority for recommendation to City Council.
 - Submit to City Council for approval.
- Marketing
 - Eligibility presented on Owasso Economic Development website.
 - Package with federal, state and other incentives in client proposals.

A.3. Industrial/Office Parks

GOAL

Competitive sites ready for development and available buildings, all with complete information, to meet target prospect needs for industrial and office operations.

WHY IMPORTANT?

Businesses need a place to locate. They will locate expansions and new operations where they can meet their project timelines. This requires us to not only have complete information on available sites and building documented, we also need to have sites and buildings ready to meet their needs. By working on industrial and office parks proactively we will be better positioned to provide speedy client response and compete more effectively for investment and employment projects.

TACTICS – INDUSTRIAL/OFFICE PARKS

- Identify real estate partners and their respective roles
 - Land owners.
 - Developers.
 - Brokers.
 - Economic development partners.
- Inventory land
 - Determine priority development areas based on alignment to City Land Use Plan, access to infrastructure, etc.
- Determine target industry needs
 - Review Target Industry Analysis report for Industry Intelligence of Owasso target industries.
 - Research market trends.
- Assess priority sites for infrastructure needs
 - Document available infrastructure.
 - Document infrastructure needs corresponding to target industry needs.
- Develop infrastructure improvement plans
 - Plan for extensions/build out.
 - Budgets.
 - Timelines.

- Funding sources
 - Identify funding sources for infrastructure improvement plans.
 - Cost analysis for improvements.
- Land acquisition – TBD if private-sector does not choose to develop sites
- Speculative building development
 - Who’s currently building spec in regional market.
 - Document missed opportunities because of limited existing building stock in Owasso.
 - Define alternative approaches to getting a spec building built.
 - Develop spec building pro forma aligned to target industry needs.
 - Market to regional developers; if no interest, expand marketing to external developers.
 - Understand gaps for moving forward.
 - Structure deal.
- Site certification
 - Determine priority sites in partnership with landowners/developers.
 - Define roles on application process.
 - Complete and submit application.
- Online Property Database
 - Prepare complete profiles of sites and buildings.
 - Confirm information with brokers, developers, landowners.

A.4. Advocacy

GOAL

Influence municipal revenue diversification in Oklahoma.

WHY IMPORTANT?

Oklahoma cities survive or die on sales tax as the sole revenue stream for operations. Oklahoma is the only state in the nation where sites and towns must rely on sales tax as their primary revenue source. This state policy causes short-sided focus towards sales tax generating businesses. As more Oklahoma cities recruit sales tax generating businesses, it becomes a zero-sum-game versus a focus on wealth-generating industry growth for local and state economies.

Leadership across the community is concerned about the implications of this policy for the long-term economic health of Owasso and all Oklahoma cities. Current challenges with the state budget already draw attention to fiscal policy issues necessitating an update. Including this initiative in the Owasso Economic Development Strategy is a sign of true leadership to advance Owasso’s future, so that we may be able to provide quality services for residents and businesses as we grow.

TACTICS – ADVOCACY

- Review research related on subject
 - What is status for effort.
 - Who’s involved.
 - Future projections with current revenue model.
 - History of Oklahoma model.
 - Other state’s funding models.
- Gather intel
 - Identify influencers.
 - Identify adversaries.

- Create a policy document
- Partner with advocacy groups and get buy-in
- Hire consultant
- Public input
- Convert policy document into communication piece/messaging
- Educate constituency on current tax model (and implications)
- Create plan and strategy
 - Decide State Question or Joint Resolution.
 - Communications and outreach plan.
- Create Owasso Political Action Committee with clear purpose to diversify municipal revenue model
 - Establish structure.
 - Fundraising.
 - Invest in candidates that support revenue diversification.
 - Drive legislative turnover.

B. GROWING & RECRUITING BUSINESS TO OWASSO

The initiatives in this category focus on three different avenues to expand basic industry employment and investment in Owasso by basic industries specifically.

B.1. Medical Cluster Expansion

GOAL

Establish Owasso as a destination for medical treatments and R&D to grow high-paying, sustainable jobs in Owasso. Position Owasso as nationally-recognized medical cluster and increase specialized services.

WHY IMPORTANT?

Owasso already has a strong and growing medical cluster anchored by two major hospitals. The medical field will always be in demand and rely on skilled positions with higher-earning opportunities. Local schools have programs in place (and developing more programs) to train workers for medical-related positions. Many communities, not just in the Tulsa region and throughout Oklahoma, but throughout the USA are targeting medical expansions as well. This initiative is important to allocate thoughtful and dedicated efforts to make Owasso stand out as a location for exceptional medical business growth. Owasso benefits beyond economic growth with this initiative as residents will also have access to the expanding services and programs.

TACTICS – MEDICAL CLUSTER EXPANSION

- Inventory medical service lines in Owasso
 - Document what is offered by Owasso medical institutions.
 - Who is doing R&D.
 - Define gap analysis.
 - Define market opportunities.
 - Leverage opportunities with partner hospitals (local and external).
- Inventory strengths and national awards
- Research best practices/examples
 - Investigate Tulsa assets.
 - RML consolidation from Ascension.
 - Rule out duplication.

- Stakeholder engagement
 - Hospital plans.
 - Site owner plans.
 - Universities.
- Medical Cluster development area
 - Define area.
 - Inventory sites.
 - Assess sites for development readiness.
 - Infrastructure needs assessment.
 - Funding for infrastructure.
- Targets
 - Shared definition of terms, especially regarding what is meant by R&D.
 - Pool of customers/market definition.
 - Needs of desired businesses.
- Asset mapping
 - Workforce.
 - Access.
 - Other assets to build case for Owasso.
- Benchmark to competitors
- Team learning
 - Understand what we are selling.
 - Work together for common messaging.
- Marketing
- Incentives
 - Link to Strategic Initiative A.2. Incentives Guidelines.

B.2. Expand & Attract Businesses

GOAL

Retain existing businesses and recruit diverse, high-growth companies of targeted¹ basic industries (metal manufacturing, aircraft parts, office/headquarters, information technology, and medical) in order to grow wealth and increase daytime employment in Owasso.

WHY IMPORTANT?

Taking care of existing businesses is like a business taking care of existing customers. Not only does this ensure that recruitment of new businesses to Owasso builds on the current economic base, satisfied local businesses can be important advocates and proof to prospective businesses considering an Owasso location.

The importance of proactively recruiting targeted businesses is essential to transforming and evolving the growth of Owasso's economy. If a community only answers the phone and waits for companies to locate, they may not be the types of companies or industries that positively contribute to the economy in the way Owasso desires – especially as it relates to diversification and growth of better paying jobs. Being intentional in positioning Owasso's assets for, and in front of, targeted industries is a better use of marketing and economic development resources than a shotgun approach for recruiting any business that may choose to locate in Owasso.

¹ Owasso Target Industry Analysis, December 2017

TACTICS – EXPAND & ATTRACT BUSINESSES

- Contacts database (CRM)
 - Evaluate alternative tools.
 - Training.
 - Set up.
- Inventory existing basic industry businesses and top sales tax generators in Owasso
 - Research key contacts – local and external.
 - Online research for data available on companies.
 - Input into contacts database.
 - Segment by industry sector.
- Survey existing businesses
 - Develop questions to gather useful information.
 - Design survey.
 - Survey tool.
 - Distribution.
 - Analysis.
- Existing business outreach
 - Local business outreach.
 - External HQ outreach.
 - Record interactions in contacts database.
- Organize partner team (i.e. Team Owasso) of business resources for expanding and recruiting businesses in Owasso
 - Who: real estate, workforce agencies (public and private), training and education, permitting, regulatory, utilities, OEDA, Mayor, etc.
 - Define roles and responsibilities.
- Confidentiality and ethics policy for economic development
 - Utilize IEDC Ethics training and manual for drafting policy.
 - Adopt by OEDA and City Council.
 - Have all Team Owasso members sign.
- Real estate data
 - Gather and verify real estate data on available sites and buildings. Market to local developers and brokers benefit of sharing data for marketing of properties.
 - Maintain in online real estate database.
 - Verify and update on regular schedule.
- Proposal and marketing data
 - Organize key data for proposal and marketing (i.e. website and target materials).
 - Record update schedule for new data publication.
 - Leverage partner resources.
- Supply chain research
 - Identify suppliers to existing businesses/cluster opportunities to relocate to Owasso.
- Develop target marketing materials
 - Industry business cases for each target industry.
 - Supply chain documentation.

- Market to Tulsa Regional Chamber and State/ODOC
 - Share marketing materials so that they are informed on Owasso's targets and corresponding assets to sell Owasso's value proposition.
 - Invite to Owasso for tour of assets. Show what is happening in Owasso.
- Target geographies for marketing missions
 - Reference Target Industry Analysis for industry intelligence.
 - Leverage state and regional marketing trips for potential target geographies.
 - Engage lead generation firm for one-on-one appointments in target geographies.
- Familiarization (a.k.a. FAM) tours
 - Research and develop target list of site selectors, national brokers and other key influencers to invite for tour of Owasso.
 - Leverage Tulsa Regional Chamber.
 - Invitation.
 - Consider smaller, tailored, one-on-one tours versus large groups.
 - Host.
 - Follow-up.
- Client proposals
 - Customized cover letters and order of information based of priority location factors for the project.
 - Investigate online proposal system.
- Site visits
 - Team training.
 - Orientation and planning for each visit.
 - Debrief process after each site visit.
- Client follow-up
 - Regular follow-up to advance sales process.
 - Record interactions in contacts database.
- Announcements of wins
 - Menu of services to provide company.
 - News release.
 - Media announcements.
 - Groundbreaking.
 - Ribbon cutting.

B.3. Entrepreneurship & Incubation

GOAL

Develop and implement a structured program of entrepreneurship resources, including an incubator in the Redbud District, to foster start-up and fast-growing businesses in Owasso to stay here as they grow.

WHY IMPORTANT?

Entrepreneurs start businesses where they want to live. There are many reasons why people want to live in Owasso and this resident-attraction strength is an opportunity to leverage for business development through entrepreneurship. Often, where a company starts is where they continue to have a presence for the long run ... *if they get the resources and assistance they need to expand and grow.*

The Competitiveness Assessment uncovered many entrepreneurship resources throughout the Tulsa region, but none of these resources are located in Owasso. There is a connection link that is needed to maximize the value of these resources for local businesses and entrepreneurs.

TACTICS – ENTREPRENEURSHIP & INCUBATION

- Monitor Redbud District revenue to better understand timeline for funding incubator.
- Explore options of entrepreneurship program focus
 - Identify potential entrepreneur clients.
 - Identify their needs and challenges.
- Develop and assemble portfolio of entrepreneurship resources
- Test resources
 - i.e. “pop-up” space for co-working, training, workshops.
- Identify partners and resources to define entrepreneurship landscape in Owasso and region
- Develop guidelines and directives for incubator
- Develop business plan for incubator
 - Program and service offerings.
 - Space requirements.
 - Staffing requirements.
 - Pro forma.
- Identify sustainable funding models
 - Vet funding sources.
 - Document viability of financial model.
- Hire initial staff
- Space development for incubator
- Marketing & communications strategy to attract participants
- Incubator operations
 - Individual entrepreneur needs assessment.
 - Agreements for participating entrepreneurs.
 - Graduation requirements and accountability.
 - Continue to build-out support network.

C. MARKETING OWASSO

In the era of robust information and immense competition in economic development, Owasso must tell its story to get attention. And the story must be authentic and clear so that it is understood, believable and memorable to stand out in the chatter of overwhelming media.

C.1. Owasso Identity

GOAL

Define consistent identity for Owasso supported with relevant message and facts.

WHY IMPORTANT?

As a suburban community, it is valuable to leverage the known community of the region – Tulsa. Yet, there are many suburbs clamoring for attention and Owasso needs to define compelling, authentic and unique attributes to frame a cohesive and memorable identity for who Owasso is now and in the future.

TACTICS – OWASSO IDENTITY

- Define target audiences
- Define messaging and Owasso’s value proposition
 - Convene partners for input.
 - Agree on “who we are”.
- Graphic imagery
 - Hire graphic designer to assist with development of identity that matches messaging.
 - Inventory all current images.
 - Framework comparison to other community’s identities.
 - Document design guidelines.
- Buy-in with partners, schools
- Reveal new Owasso identity and messaging platform

C.2. Owasso’s Online Presence

GOAL

Establish effective online presence for Owasso with information available “24 X 7” to save staff time.

WHY IMPORTANT?

Owasso has no economic development-specific website and limited social media accounts and messaging. The leading marketing tool for economic development marketing is a website that presents relevant data, case studies of local businesses, maps and other points of interest that influence business location decision-making. Not only is this the first place a business or site selector seeks information, it may be the only place information is gathered before a desktop screen of the community is made. No information available online may result in elimination of consideration.

A website also serves as a place to house the most current information for staff to present to businesses and the community at-large. In turn, a website provides the information around the clock and saves time – for businesses, site selectors and staff.

Regarding social media, increasingly businesses and site selectors are gathering news from these outlets. In addition, as a means to share information, relationships develop based on the value of that information and dialoguing. When a community is not participating in social media, there is a void that competitors can fill with news about their communities.

TACTICS – OWASSO’S ONLINE PRESENCE

- Research economic development websites
 - Navigation.
 - Layout.
 - Look.
- Select web designer/web platform
- Domain name
 - Select options.
 - Register domain name.

- Site map
 - Searchable real estate database.
 - Site selection factors.
 - Economic development programs, services and business resources.
 - Integrate social media.
- Organize and upload content
 - Data subscriptions to leverage or purchase (i.e. StateBook)
- Schedule regular updates of website content
- Social media policy and updates

PLAN COMPONENTS

The complete Owasso Economic Development Strategy is composed of several documents to support effective implementation and communications, including:



ACCOUNTABLE IMPLEMENTATION

For each of the nine strategic initiatives, teams are assembled, and Team Leads are committed to lead the initiative. The Team Leads met to define and agree to practices for successful implementation that will keep all efforts on track and leverage accomplishments among teams.

A. MINIMUM SPECIFICATIONS FOR SUCCESSFUL IMPLEMENTATION

Team Leads devised the following fundamental practices to guide not only their specific team, but collectively among teams:

- Gather teams
- Delegate
- Research
- Establish and adhere to meeting scheduled
- Keep on time and on budget
- Communicate regularly and effectively
- Report regularly and on time
- Collaborate, understanding that each team and corresponding Team Lead are not “an island”

B. ORGANIZING AND REPORTING

Team Leads agreed upon consistent team engagement and reporting to advance the work detailed and developed by the teams for each strategic initiative:

- Since all Team Leads work at the City of Owasso, store all strategy documents, including the Implementation Timeline on shared drive.
- Bring team members together to define roles based on skills and interests where they would like to contribute.
- Identify additional team members to be invited to participate in strategic initiative.
- Identify and invite Assistant Team Leads.
- Monthly reporting by Team Leads to track progress.

C. COMMUNICATIONS

There are a variety of audiences interested in the progress of economic development strategy implementation in Owasso. On a regular basis, the Team Leads will communicate to corresponding audiences as to accomplishments and progress forward with implementation. This practice enables celebration and education along the way, as major wins in economic development occur infrequently, yet these milestones contribute to the opportunities for major successes to be more viable.

AUDIENCE	COMMUNICATION MEDIUM
Businesses & Residents	Website Social media Annual Economic Summit
City Council Owasso Economic Development Authority	Reports (staff memos) Presentations
External Groups, such as Owasso Chamber of Commerce, Hospital Boards, etc.	Ad hoc presentations
Development and Real Estate Community	Presentations

ACKNOWLEDGEMENTS

The Owasso Economic Development Strategy is more than a simple document. It is a living and active plan developed by an expansive list of engaged and committed leaders in our community. It is because of this tremendous leadership that we are able to take on bold and critically important initiatives laid out in this plan.

OWASSO CITY COUNCIL

Lyndell Dunn, Mayor	Dr. Chris Kelley, Vice Mayor	Doug Bonebrake, Councilor
Bill Bush, Councilor	Jeri Moberly, Councilor	

OWASSO ECONOMIC DEVELOPMENT AUTHORITY

Dr. Bryan Spriggs, Chair	Jeri Moberly, Trustee	Gary Akin, Trustee
David Charney, Trustee	Skip Mefford, Trustee	Dee Sokolosky, Trustee
Dr. Dirk Thomas, Trustee		

ECONOMIC DEVELOPMENT STRATEGIC PLANNING STEERING COMMITTEE

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ADDITIONAL COMMUNITY LEADERS INVOLVED IN STRATEGIC PLANNING

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ABOUT THE CONSULTING FIRM

The Economic Development Strategic Planning project for the City of Owasso, Oklahoma was developed with technical assistance and stakeholder engagement of TadZo. TadZo is an economic development and site selection consulting firm. Businesses and communities want essentially the same things: economic vitality, wealth creation, quality place and environment. TadZo works with communities to achieve these outcomes. TadZo also assist companies to identify communities with these attributes that support business strategy and competitive advantage.



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The Intersection of Site Selection & Economic Development