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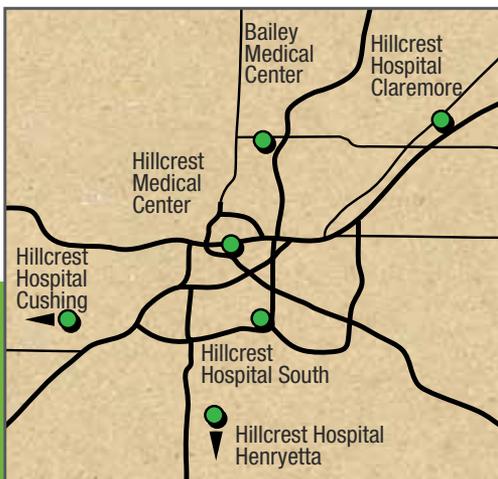


strength in numbers



5,288 employees
1,200 physicians
49 healthcare clinics
6 hospitals
1 goal

In healthcare, convenience means easier access to better technology and the expertise of some of the best minds in medicine. Our facilities include Hillcrest Medical Center, Hillcrest Hospital South, Hillcrest Hospital Claremore, Oklahoma Heart Institute, Bailey Medical Center, hospitals in Cushing and Henryetta, and our Utica Park Clinics. We have one goal... to improve health in the communities we serve.



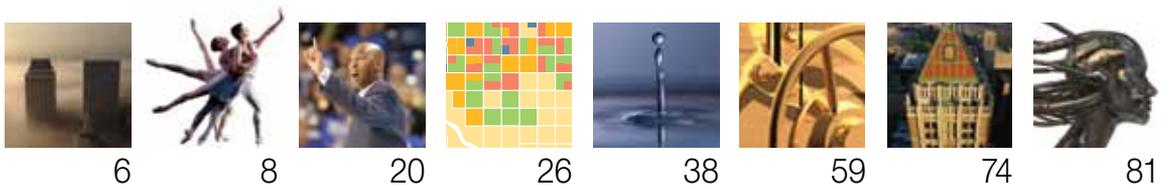
hillcrest

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Hillcrest Medical Center
Hillcrest Hospital South
Hillcrest Hospital Claremore
Hillcrest Hospital Cushing

Hillcrest Hospital Henryetta
Oklahoma Heart Institute
Bailey Medical Center
Utica Park Clinic

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Tulsa City Councilors

- District **1** *Jack Henderson*
- District **2** *Jeannie Cue*
- District **3** *David Patrick*
- District **4** *Blake Ewing*
- District **5** *Karen Gilbert*
- District **6** *Byron "Skip" Steele*
- District **7** *Arianna Moore*
- District **8** *Phil Lakin, Jr.*
- District **9** *G.T. Bynum*

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Council Chair



As Chairman of the 2013-2014 Tulsa City Council, it's my pleasure to reflect on the past and share my vision of Tulsa's future. As a native Tulsan, I have strong business and family roots ingrained in the foundation of Tulsa's history. Tulsa is a sophisticated metropolis that was once known as "America's Most Beautiful City."

I envision Tulsa regaining ownership of this prestigious label through concerted efforts of public-private partnerships and the continued dedicated spirit of the citizens of Tulsa.

Mayor Bartlett's administration held its first ever retreat with the Tulsa City Council using a forward-thinking approach in sharing and outlining our vision of Tulsa's future. I will diligently strive to continue strengthening ties with the Mayor's administration for peace and harmony between the two branches of government.

The city council held successful forums with the Indian Nations in an effort to develop partnerships and diversify our options to help struggling projects come to fruition. The Tulsa City Council exchanged valuable dialogue with the Oklahoma City Mayor/City Council on regionalization, transportation, and urban legislative interests.

I will continue to champion change, and use bold-faced approaches to empower local action to strengthen initiatives that support neighborhood revitalization, improve efficiency of local government, and boost further economic development in deprived areas of our great city.

I look forward to the continuing implementation of these efforts to enhance our city and what this exhilarating new year brings. As Tulsan's, we are committed for the long haul and I'm proud to be part of it!

Kind regards,

DAVID PATRICK CHAIR AND COUNCILOR, DISTRICT 3

City Council



Jack Henderson
Councilor District 1



Jeannie Cue
Councilor District 2



David Patrick
Councilor District 3



Blake Ewing
Councilor District 4



Karen Gilbert
Councilor District 5



Byron "Skip" Steele
Councilor District 6



Arianna Moore
Councilor District 7



Phil Lakin, Jr.
Councilor District 8



G.T. Bynum
Councilor District 9

Mayor of Tulsa



On behalf of the City of Tulsa, I would like to welcome you to the 2013 Vision Tulsa publication.

Tulsa is still recovering from the financial crisis that began in 2008, which placed unprecedented burdens on the municipal budget and on many Tulsa businesses and families.

As Tulsa's mayor, I'm proud to say that my staff, working with the city council, along with many dedicated city employees, has made significant strides in making city government more efficient in delivering services to citizens.

Early in my term, we conducted a citizens' survey to help us learn what Tulsans want from their municipal government. We followed that with a series of "City Hall in Your Neighborhood" meetings in each of Tulsa's nine council districts so people could tell us, face-to-face, about their concerns, wants, and needs.

Those citizens' desires and priorities are guiding us as we continue to build Tulsa's economy, working with local businesses, educational facilities, Tulsa County, the Tulsa Regional Chamber, and other entities to make Tulsa's economy stronger.

One of our special initiatives is growing the manufacturing industry in Tulsa; especially energy-related manufacturing. Tulsa's long history as a leader in the oil and gas industry makes it an ideal location to serve those segments as well as new and alternative energy businesses.

Along with aerospace and aviation, energy-related businesses provide a high percentage of the best-paying jobs in the Tulsa metro area. Today, Tulsa is second only to Houston in energy-related manufacturing jobs and we want more! A recent study by the Economic Research & Policy Institute at Oklahoma City University shows that the oil and gas industry added nearly 12,000 jobs in the last two years and that the average compensation in those jobs is more than \$113,000 per year. The mayor's office has hired a consultant to help recruit even more energy business and bring more jobs to Tulsa.

Tulsa continues to draw praise for the quality of life it offers to its citizens. The Fiscal Times recently ranked Tulsa No. 2 among the nation's 10 best cities for young people to find good jobs. The Brookings Institution ranks Tulsa among the world's top 100 economies for income and employment growth.

It is an exciting time to be a Tulsan!

Best regards,

DEWEY F. BARTLETT, JR. MAYOR, CITY OF TULSA

Tulsa Regional Chamber



You can see it all around us: the Tulsa region is experiencing resurgence. From the many cranes transforming the downtown skyline, to the lowering unemployment rate, to the growing population, Tulsa will not stand complacent. Rather, our region is improving its competitive positioning and implementing a strategy for long-term economic growth.

The Tulsa Regional Chamber is devoted to providing a large spectrum of services and programs catered to a growing membership of more than 3,100 businesses. Focusing on the areas of economic development, business retention and expansion, education, workforce attraction and retention, legislative support, advocacy, downtown development and visitor attraction, we are constantly working to serve the Tulsa region's—for both our residents and those who visit us.

But we aren't alone in these efforts.

Northeast Oklahoma's many achievements have been accomplished through collaborative rather than competitive means—collaboration in economic development, downtown development, legislative priorities, and more.

Today's fastest-growing economies are taking a collaborative, regional approach because regionalism leverages industry concentrations, workforce, infrastructure, and pro-business government. In other words, regionalism is about pooling our assets and combining our resources. It's about bringing together Tulsa's greatest strengths, Broken Arrow's greatest strengths, Jenks' greatest strengths, and so on, to show what the Tulsa region has to offer.

And we have a lot to offer.

The Tulsa region continues to solidify its standing as a national leader, earning accolades for its impressive job creation, thriving economy, and more. In recent months, the Tulsa region has been recognized by The Fiscal Times as a top location for young people to find employment and as a top U.S. manufacturing base by Bureau of Labor Statistics data. In addition, we've been recognized as a national leader for percentage growth in exports by the Brookings Institution. Northeast Oklahoma also has earned recognition for factors related to its livability, business friendliness, and other attributes. In other words, our assets are diverse and thriving.

And I am confident the best is yet to come.

MIKE NEAL PRESIDENT AND CEO, TULSA REGIONAL CHAMBER



*Built as Tulsa's first "suburban" shopping center in 1952, **Utica Square** has a signature 1890 clock.*

Tulsa Global Alliance



The Tulsa Global Alliance (TGA) is pleased to have this opportunity to be a part of Vision 2013. We are honored to foster, encourage, and promote economic development, good will and understanding, and cultural and business exchanges between Tulsa and its eight Sister Cities.

TGA is recognized as the gateway for international programs in Northeast Oklahoma and our mission is to increase global understanding and to link people and institutions worldwide. Since 1976, nearly immeasurable community volunteer involvement has made it possible for Tulsa to have eight active Sister City partnerships and to bring international awareness to several generations. Our supporters are citizens who believe in the cause of cultural understanding and have a passion for building bridges for positive relations in the world.

Whether large festival, intimate in-home dinners with guests from other countries, international business seminars, foreign dignitary receptions, or student/teacher exchange with homestays, our programs offer the most unique educational, economic, and multicultural citizen diplomacy opportunities in the state!

Some of our 2012 actions:

Opportunities for businesses to build global connections. The 2012 international business seminars focused on *Doing Business with Brazil, Argentina and the Mercosur Area*, and *Breaking the Barriers, Six Steps to Going Global*. 2013 will be the seventh year for TGA, partnering with The University of Tulsa, to offer a series of International Business Seminars focusing on doing business in countries that are Oklahoma's primary and future trade partners.

TGA programs allow citizens to exercise their right and responsibility as citizen diplomats to help shape foreign relations. Including visitors from the U.S. State Department international visitor leadership program and from Sister Cities, professional and home-visit volunteers hosted 270 guests from 63 countries. 200 Tulsans attended our new "Toast the Travelers" receptions honoring select delegations of international visitors.

International visitors contribute to the Northeast Oklahoma economy. The economic impact of TGA visitors and programs was more than \$770,000 in 2012.

Building global literacy and cultural competence among citizens. The award-winning, best ever, Kids' World International Festival was held November 15-17. School children from all over Eastern Oklahoma learned about more than 50 countries or cultures. In April, TGA co-hosted a Summit on Citizen Diplomacy with the University of Tulsa, Tulsa Community College, and the United Nations Association of Eastern Oklahoma. TGA promotes the Culture Box program housed at Eisenhower International School, the Tucky Roger Education Fellowship, and a Speakers Bureau.

Showcasing our area's resources to international decision-makers and emerging leaders. More than 225 professionals hosted international visitors and 32 international visitor and sister city programs covered 25 different industry/interest fields.

2013 brings great opportunities for Tulsa in international economic development, citizen diplomacy, and in building global literacy and cultural competence in our community. In partnership with the City of Tulsa, the Mayor's Office, the City Council and numerous members and volunteers, TGA invites you to join us in striving to make Tulsa a truly remarkable place to live.

Sincerely,

BECKY COLLINS PRESIDENT AND CEO, TULSA GLOBAL ALLIANCE

Plan/Tulsa



Planning is sometimes difficult to explain because it tends to encompass a great number of issues and ideas. I believe the best definition for planning is thinking ahead. It starts with a vision for where we want to be and provides a foundation and strategy for achieving that vision together. Tulsa's vision for the future is expressed in our comprehensive plan. Often referred to as PLANITULSA, the updated plan was adopted by the Planning Commission and approved by the City Council in 2010. I am pleased to report that implementation of PLANITULSA is moving full steam ahead.

In the past several months, we have been working with neighborhoods to develop four small area plans in accordance with the process outlined in PLANITULSA. A variety of public meetings, open houses, and workshops have been conducted to ensure plenty of opportunities to participate in the development of these plans. A consultant and a citizen advisory team are engaged to update our zoning and subdivision regulations. This is a critical implementation step for PLANITULSA because these regulations need to facilitate the kind of development we have envisioned for the future. We will calibrate our codes so moving forward our built environment meets and hopefully exceeds our expectations. A redevelopment strategy is being drafted which will include a strong and active brownfield program, a process of assessing and prioritizing opportunity sites for redevelopment and a toolbox of incentives and methodologies that will better facilitate projects that represent the values of our shared vision. We also continue to realign planning functions to support ongoing implementation.

Thousands of Tulsans worked together for more than two years to create PLANITULSA. Since joining the city just under a year ago, I have focused on implementation as well as building relationships both internal and within the greater community that will support our success in this effort. The Planning & Economic Development Department has been entrusted with the success of this plan. I am proud of the work the department has produced this year and I look forward to advancing our common goals for planned growth and an enriched quality of life for Tulsa in 2013.

Sincerely,

DAWN WARRICK CITY OF TULSA



emerging downtown

“Downtown. Lights on buildings and everything that makes you wonder.”

Stephen Chbosky, The Perks of Being a Wallflower

We are seeing the greatest investment in downtown Tulsa since the 1920s, when oil and money flowed like prohibition liquor.

The stunning re-emergence of downtown Tulsa is more than just a list of new developments, but the list is impressive. In just the last few years, we've seen the opening of the BOK Center and a renovated Convention Center, ONEOK Field, more than 25 new restaurants, dozens of shops and galleries, new clubs and music venues, and new and renovated hotels.

Downtown is the focus of art and architecture, cuisine and culture, and everything that makes Tulsa unique. Downtown Tulsa is the only place in the region you're likely to find masked luchadores running through the streets, *Aida* performed in its original Italian, live music at the historic Cain's Ballroom or Brady Theater, a large collection of stunning modern and art deco architecture, a world class cycling road race, and one of the largest



The **Tulsa Drillers** play ball at the new ONEOK Field.



St. Patrick's Day parties, art festivals, local music festivals, BBQ competitions, and car shows in the state. The vibrancy of Tulsa's urban core is strong and getting stronger, offering everyone in the region an exciting cultural and entertainment destination.

But downtown is not just about events or architecture; it's about people. In *The Death and Life of Great American Cities*, Jane Jacobs said, "You can't rely on bringing people downtown, you have to put them there." In other words, you can't just rely on attracting visitors from the suburbs. Downtown has to be more than just a skyline view from the expressway. People have to live, and work, and be invested here. Increasingly, we are.

New homes and live-work spaces are sprouting up everywhere—the Tribune and Metro Lofts, the Philtower, Mayo 420, the Mayo Hotel Lofts, the Bed Check Building, Detroit Lofts, Brady District Flats, Greenarch—and even more are on the horizon.

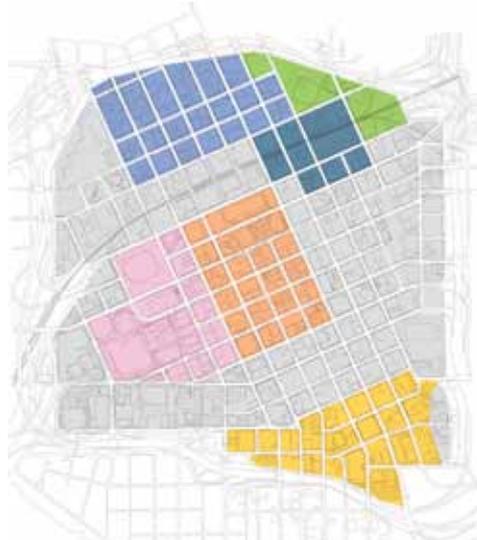
It may be hard to believe, but with this increase in residential offerings, downtown is the fastest-growing neighborhood in the City of Tulsa.

As more Tulsans choose to live downtown, viable neighborhoods are re-emerging. Parks are replacing parking lots. Downtowners can now walk their dogs at the Chapman Centennial Green or enjoy an evening concert at the spectacular new Guthrie Green.

Downtown churches, always anchors, are making substantial new investments. First Presbyterian has just celebrated the completion of a \$40 million renovation and expansion, the largest project of its kind in Tulsa's history. All Souls Unitarian Church is moving its whole congregation to be a part of downtown's renaissance.

In the 1950s, downtown's elegant department stores were the hub of retail activity in the region. After a few fallow decades, cash registers are ringing again in new downtown shops—like

Downtown Tulsa
Brady Arts District
Greenwood District
Blue Dome District
Art Deco District
BOK Center District
Route 66 District



Duncan...” Through 50 misguided years of urban renewal, jobs remained, but nearly everything and everyone else moved to the suburbs. Well, everything and everyone is coming back.

Downtown’s revival is not happening in a vacuum. The first new small-area plan adopted as a component of PlaniTulsa was the four-volume Downtown Area Master Plan. Many of the plan’s recommendations are already being implemented, through both public and private investment. A downtown housing demand study highlights the need for even more residential development. City planners are hard at work on solutions to issues like parking and traffic circulation. Amid unprecedented new development, the Tulsa Preservation Commission is maintaining a focus on downtown’s wholly unique architectural heritage. The Downtown Coordinating Council and a new City-County-Chamber partnership are helping to coordinate it all.

This downtown development is especially important to Tulsa as a vibrant urban core is an essential part of a balanced city. Tulsa has done an incredible job over the years of providing a great city for families, with strong residential neighborhoods, beautiful parks and amenities, great churches, and convenient areas of commerce. A new generation of Tulsans is focusing its attention inward and is working to rebuild what was once great, creating a more diverse and dynamic city that has a little bit of something for everyone.

As we watch the 18-story One Place Tower and new KOTV studios rise out of the ground; as the Universities of Oklahoma and Tulsa raise money for a new downtown medical school; as the Central Library begins its renovation; as new employers move their offices into downtown; and as new hotels, apartments, condos, restaurants, retail shops and parks are built, we can be confident that Downtown Tulsa’s modern renaissance is just beginning. ♦



*The **BOK Center** in Tulsa is one of the premier state-of-the-art venues in America. Cesar Pelli created an architectural monument that Tulsa will enjoy for years to come. Owned by the City of Tulsa, the BOK Center is part of Vision 2025, a project to grow economic and community infrastructure for future generations.*

Dwelling Spaces, Boomtown Tees, Just Camp, Fleet Feet, Lyon’s Indian Store, Lee’s Bike Shop, and even pop-up shops at 5th and Boston.

You can’t talk about downtown without talking about its restaurants, pubs, and venues. Downtown’s restaurant boom has been especially impressive, with growth that rivals any other part of town, even the typical suburban-oriented developments to which Tulsans have become so accustomed. Perhaps most notable is the fact that they are almost entirely locally owned original concepts, giving Downtown Tulsa the largest concentration of locally owned restaurants, bars, and venues in the area.

We’ve all heard it. “When I was a kid, it was all happening downtown. We would go the matinee at the Majestic while mom shopped at Brown-



the arts

Nine years in the making, with thousands of hours of hard work, an amazing staff, an incredible architecture firm, a fantastic construction company, an unbelievable capital campaign cabinet, visionary donors, and a board of directors that never lost sight of the prize, tonight we proudly present to the citizens of Tulsa the new Hardesty Arts Center (AHH).

With these words the new AHH in the heart of the Brady Arts District was officially opened on December 14, 2012. This \$12 million, 42,000-square-foot facility with classroom, gallery, and studio space showcases the Arts & Humanities Council of Tulsa's arts education programs, and provides opportunities for the entire community to experience the arts at a whole new level. The

Brady Arts District really came into its own in 2012, with the first of several facilities within the Mathews Warehouse, the Zarrow Center for Arts Education, opening in May. The Guthrie Green, with performance space, fountains, and programming for the entire family, became a



Gilcrease Museum houses the world's largest and most comprehensive collection of art and artifacts of the American West.

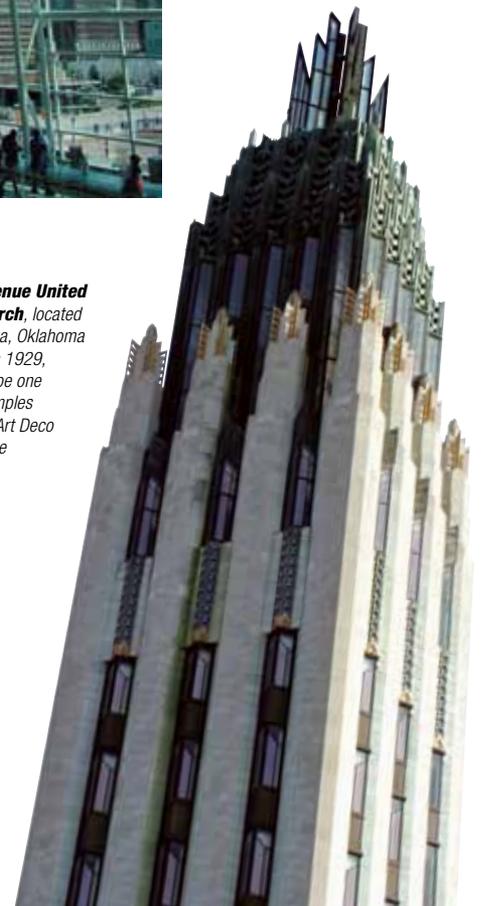


The **BOK Center** continues to rank in the Top 10 arenas for ticket sales in the United States.



Teapot
Paul Schreckengost (1908–1983)
Designed c. 1938
From the George R. Kravis II Design Collection,
Philbrook Museum of Art, Tulsa, Oklahoma.

The **Boston Avenue United Methodist Church**, located in downtown Tulsa, Oklahoma and completed in 1929, is considered to be one of the finest examples of ecclesiastical Art Deco architecture in the United States.



major gathering place for Tulsa when it debuted in September. The park also serves as a geothermal field, providing heating and cooling to the Mathews Warehouse tenants and the AHHA.

Truly this is an exciting time for Tulsa!

So many exciting projects are currently underway in the Brady Arts District! The George Kaiser

Family Foundation is continuing to transform the former Mathews Warehouse where, in addition to the Zarrow Center, venues for Philbrook Museum of Art's Eugene Adkins Collection of Southwest Art and Artifacts and a Modern Design gallery, featuring a collection donated by George Kravis, is currently under construction, as well as the Woody Guthrie Archives. The Brady Craft Alliance (Contemporary 108) will also have office

and gallery space in the new facility, along with rehearsal and office space for the Tulsa Symphony, as well as arts incubator space for several nonprofit organizations.

Living Arts celebrated its second anniversary in its new space, the former Bed-Check Building,

CONTINUED ON PAGE 10



The **Hardesty Arts Center** in the Brady Arts District.



A recent evening of tribute to **Tulsa Ballet's** founders, Roman Jasinski and Moscelyne Larkin, Ballet Russe.

Nampeyo (Hopi)
1925
Polychrome-Ceramic
Gilcrease Museum, Tulsa, Oklahoma.



CONTINUED FROM PAGE 9

which also provides loft apartments for Teach for America teachers. Living Arts continues to host numerous exhibitions and workshops supporting artists throughout the community.

The renewed interest in the Brady Arts District has generated even more activity at the Cain's Ballroom and the Brady Theatre as they continue

to attract record crowds to their venues, offering musical acts of all kinds. The BOK Center continued to wow audiences and guest artists alike, and hosted many of the top names in the entertainment industry. It continues to rank in the Top 10 arenas for ticket sales in the U.S. Neighboring districts around Brady include Greenwood, Blue Dome, and Art Deco. All of them are adding new features and facilities that celebrate the arts and culture of our community.

And, of course, in addition to visual arts, Tulsa is fortunate to have many performing arts organizations and venues. The Tulsa Performing Arts Center is the home for Tulsa Ballet, Tulsa Opera, and Tulsa Symphony, as well as numerous theatre companies and touring shows. In a partnership with the George Kaiser Family Foundation, the Tulsa Performing Arts Center Trust is managing the programming of the



In 1938, Waite and Genevieve Phillips surprised Tulsans with the announcement of his gift of the 72-room mansion and surrounding 23 acres of grounds as an art center for the City of Tulsa. **Philbrook Museum of Art** is now one of America's finest art museums.

The Tulsa Performing Arts Center Trust brought Broadway's longest-running comedy thriller **Alfred Hitchcock's** *The 39 Steps to Tulsa*.



Beaver Effigy Platform Pipe
Pike County, Illinois
Hopewell (ca. 200 CE)
Stone – Steatite
Gilcrease Museum, Tulsa, Oklahoma



Guthrie Green, providing all styles of weekend entertainment and drawing large crowds from across the community.

Tulsa Ballet celebrated the life of Moscelyne Larkin, the co-founder of Tulsa Ballet, who recently died at the age of 87. Ms. Larkin was

also one of the Five American Indian Ballerinas, designated as Oklahoma Treasures in 1997. Today's Tulsa Ballet is a remarkable company, staging works by renowned choreographers from around the world. This year saw the return of a new favorite, Ben Stevenson's *Dracula*, with outstanding costumes and scenery.

Oklahoma's own Sarah Coburn headlined Tulsa Opera's production of Donizetti's *The Daughter of the Regiment*. And it also presented a highly acclaimed production of *Dead Man Walking*, composed by Jake Heggie with libretto by Terrence McNally, and based on the novel by Sister Helen Prejean.

CONTINUED ON PAGE 12



Frederic Remington
The Stampede
Oil on canvas, 1908
Gilcrease Museum, Tulsa, Oklahoma.



Celebrity Attractions
recently featured
Disney's Mary Poppins.



Theatre Tulsa's **Neil**
Simon's The Odd Couple.

CONTINUED FROM PAGE 11

The Tulsa Awards for Theatre Excellence (TATE Awards) held its fourth awards ceremony in June at the beautiful, new Lorton Performance Center on the campus of the University of Tulsa. Sponsored by the George Kaiser Family Foundation and organized by the Tulsa Performing Arts Center Trust with assistance from the Arts

& Humanities Council of Tulsa, the TATE Awards encourages Tulsa-based theatre groups to put their best foot forward in their performances of straight plays, with the possibility of winning cash prizes, including \$10,000 for first place.

The Oklahoma Center for Poets and Writers, located at OSU-Tulsa in the Greenwood District hosted best-selling author, Pat Conroy, for an evening of readings and commentary as part of its Tulsa Reads initiative, using books to enlarge

our thinking, broaden our hearts, and build a better community!

And speaking of community, The Tulsa City-County Library continued to play a central role in the Tulsa community. Among the highlights in 2012 was the awarding of the Peggy V. Helmerich Distinguished Author Award to American writer and farmer, Wendell Berry. In 2010, Berry received a National Humanities Medal for his achievements as a poet,



The Wild Turkey
John James Audubon
Oil on canvas, 1845
Gilcrease Museum, Tulsa, Oklahoma.

The **Warehouse Market**, also known as "The Farmers' Market" was a principal supplier of groceries in Tulsa during the 1930s.



Tulsa Ballet, Ben Stevenson's Dracula.



This year for the holiday season **Philbrook Museum of Art** provided glowing gardens.

Gilcrease Museum



novelist, farmer, and conservationist. In 2012, the National Endowment for the Humanities selected Berry to deliver the 41st annual Jefferson Lecture in the Humanities, which is the federal government's most prestigious honor for intellectual achievement in the humanities.

The Anne V. Zarrow Award for Young Readers' Literature was presented to author Jacqueline Woodson. Woodson has written 24 books—novels for young adults and middle-schoolers

as well as picture books for the very young—that have earned her a number of major awards for children's literature, including the Newbery and Caldecott prizes.

Downtown Tulsa saw tremendous investment in 2012, with even more to come in 2013! Establishing a vibrant, urban, walkable, and livable community is becoming a reality. Excitement builds in downtown Tulsa! Come experience it for yourself!!

One of the premier facilities for the preservation and study of American art and history, Gilcrease Museum houses the world's largest and most comprehensive collection of art and artifacts of the American West, including an unparalleled Native American collection. Its galleries and vaults contain more than a quarter-million extraordinary artifacts related to the indigenous people of the Americas and thousands of historical documents, rare books, maps, and manuscripts

The museum is nestled in the scenic Osage Hills near downtown Tulsa. Themed gardens have been developed on 23 of the museum's 460 acres. The Pre-Columbian, Pioneer, Colonial, Victorian, and Rock gardens enhance the museum's collections by reflecting gardening styles and techniques from the American West.

The University of Tulsa (TU) manages the museum through an innovative public-private partnership with the City of Tulsa, which owns the museum and collection. TU is leveraging its nationally recognized academic expertise in western American history, art history, anthropology, and archaeology to advance understanding of the collection and now offers an interdisciplinary master's program in Museum Science and Management.

TU also began construction in fall 2012 on The Helmerich Center for American Research to be built adjacent to the museum.

The Helmerich Center for American Research will enhance scholarship opportunities relating to the Gilcrease Museum as well as secure broader international attention for Gilcrease Museum and Tulsa. The facility will house the Gilcrease Library and Archive containing nearly 100,000 rare books, documents, maps, and unpublished works. The research center is expected to open in 2014.

The Restaurant at Gilcrease offers lunch and Sunday brunch in its contemporary, upscale dining room with sweeping views of the Oklahoma landscape. For more information, visit gilcrease.utulsa.edu.

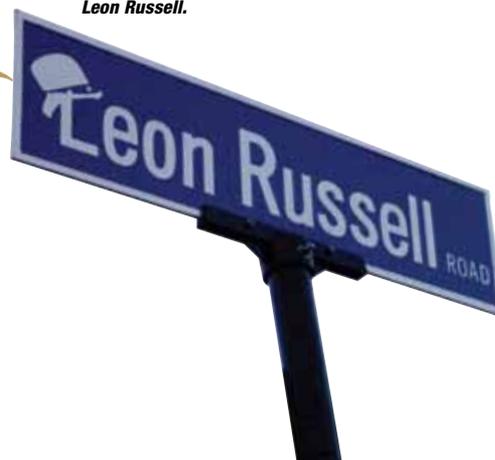


Cain's Ballroom. KVOO, and the Bob Wills legacy musically owned the country coast-to-coast for more than thirty years.

A portion of Third Street in Tulsa, Oklahoma, bordering the Church Studio which Russell owned and operated in the 1960s and 1970s, is now **Leon Russell Road.** It is a couple of miles east of downtown and a few miles from Will Rogers High School, where Russell started his musical career.



Leon Russell.



living & lifestyles

Should you find yourself wandering around the Blue Dome District in Downtown Tulsa one Saturday night, you'll be forgiven for forgetting you're in T-Town. The area, much like the city it lives in, tends to surprise the uninitiated.

At first, you might think you're in Ireland. Yes, Ireland. After all, McNellie's Public House has all the trappings one expects from a traditional Irish pub—from the low-key lighting to the inviting ambiance to the continuous supply of fish 'n' chips.

But go a little further in the Blue Dome and you'll no longer think you're in Dublin—but in Berlin. In which case you've found yourself at Fassler Hall. We suggest you indulge in a tall stein frosting over with delicious, though difficult to pronounce, German beer.

While these two Euro-centric destinations bookmark the District, they do not define it. It's far, far too eclectic for that. Take a stroll between them and you'll wonder not where you are, but when. You've clearly found yourself at The Max RetroPub, a hugely popular hangout plucked from the 80s, right down to the skee-ball and Pac-Man video games.



*In Tulsa County's 2003 Vision 2025 package, \$15 million was set aside for various improvements tied to a **Route 66** master plan.*

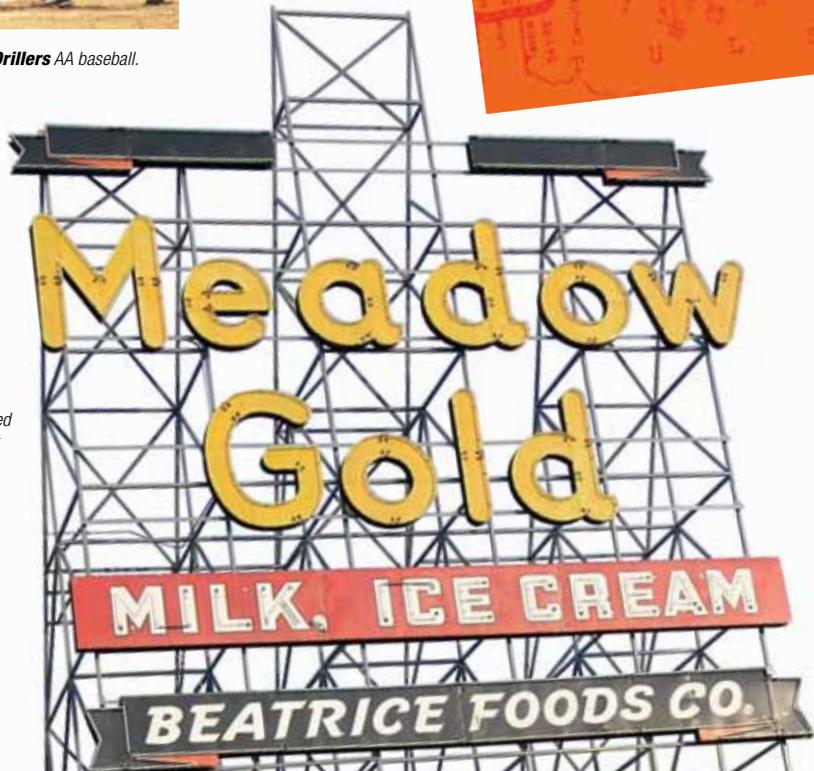


Utica Square.



Tulsa Drillers AA baseball.

*Refurbishing and installation of the iconic **Meadow Gold Sign** upon a specially designed pavilion at the southwest corner of 11th Street and Quaker Avenue was completed in May 2009, partially funded by Vision 2025.*



Here's the amazing thing: Despite everything you've seen, everything you've experienced, never once have you left Tulsa. All this energy, all this excitement, all of it can be found in only half a mile. But of course, Tulsa's vivacious personality can't be confined to any one area. You'll see it all over town!

Perhaps that's the best word for it—personality. Difficult to define, even more difficult to

manufacture, something that can only spring forth naturally. You just know it when you see it. And with all due humility in Tulsa, we have it—lots of it.

Let's stick with Downtown, shall we? Just outside the Blue Dome, in the equally historic Greenwood District, is ONEOK Field. Home to Texas-league baseball team the Tulsa Drillers, ONEOK Field promises more than a great day at the ballgame. The diamond of downtown, this state-of-the-art ballpark continues to earn raves from everyone who visits. And after three seasons with attendance well north of 350,000, clearly a lot of people have done so.

A few blocks west of ONEOK Field is the inspiring Brady Arts District. Not content to simply be a loose collection of businesses, the Brady is a celebration of all things creative. Consisting of restaurants, dives, music halls, design agencies, photography studios, and even engineering firms, the creative spirit thrives here as much today as it did when it was home to the pioneers and wildcatters of yore.

CONTINUED ON PAGE 18



Arnel Pineda of Journey at the BOK Center.



The **Tulsa Zoo** has been a family tradition for more than 80 years, spanning 84 beautifully landscaped acres with over 1,200 animals, many of them rare and endangered.



Cesar Pelli's sketch of the BOK Center.

Hard Rock Hotel & Casino Tulsa



For nearly two decades, there has been continual growth at 777 W. Cherokee Street. What began as a small bingo hall for the Cherokee Nation has evolved into Hard Rock Hotel & Casino Tulsa, now in its third year of operation by Cherokee Nation Entertainment.

Hard Rock Hotel & Casino Tulsa is the premier entertainment and resort destination in northeast Oklahoma, bringing tourism to Tulsa and helping build a stronger local economy.



“The growth of Cherokee Nation Entertainment creates jobs for Cherokees and helps generate vital funding for Cherokee Nation services. As our flagship property, Hard Rock Hotel & Casino Tulsa has continued to grow, now employing more than 1,500 people,” said Principal Chief of the Cherokee Nation Bill John Baker. “Hard Rock has brought millions of dollars into the economy, which helps improve the lives of local residents.”

Here, there’s something for everyone.

The atmosphere is electric, and the huge casino floor is wired for fun with more than 2,600 of the newest and most popular electronic games. Included on the gaming floor is a new non-smoking section that includes a poker room and smoke-free gaming.

For those who like the challenge of poker tournament play or just the excitement of playing by the hand, Blackjack, Pai Gow, Texas Hold’em, Seven-Card Stud, Let It Ride, Omaha, Bonus Roulette and Bonus Craps are never far away.

Whether you love rock ‘n’ roll or country, you will be able to watch some of music’s most popular acts performing at The Joint: Tulsa, a 2,700-seat venue that makes you feel like you’re within arm’s reach of the stage.

The resort features a 19-story luxury hotel with more than 350 rooms and suites. Due to overwhelming demand, an additional 100 suites now exist in a stunning new 10-story hotel tower. Each is casually luxurious with the kind of sleek design you’d expect from a modern hotel.

There are six dining venues: Toby Keith’s “I Love This Bar & Grill,” Buffet, Perfect Cup, Lyrics, Champions Grill, McGill’s on 19—a posh penthouse restaurant—and three new food court options in Salsa, FlipSide and Slice. Six bars and entertainment venues each provide a cool atmosphere for hot nightlife. Center Bar is a great place to meet friends for a drink, while Friction features live music, a dance floor, and specialty drinks. For sports fans, Replay offers a full bar with more than 50 beers, a scrolling game ticker and a plethora of TVs, so you’ll never miss a game.



Rounding out the Hard Rock Hotel & Casino Tulsa experience is an impressive 35,000 square feet of meeting space, great shopping options, a swimming pool, and the renowned Cherokee Hills Golf Club, which was voted one of the top five public courses in Oklahoma two years in a row by *Golfweek* magazine.

To learn more, visit hardrockcasinotulsa.com.



Tulsa Zoo

A Rich History in Tulsa

The Tulsa Zoo has been a community treasure for decades. In 2013, the zoo celebrates its 85th year inspiring passion for wildlife. The zoo was founded by Tulsa Park Superintendent Will O. Doolittle in 1927 as a place for wildlife education and recreation for the families of Tulsa and the surrounding communities. The Tulsa Zoo first opened its gates to the public in September 1928 with 35 animals on display. Today the Tulsa Zoo showcases more than 2,500 animals representing more than 500 species, many rare and endangered in the wild. In 85 years, the zoo has grown immensely, but has stayed true to this core vision. The zoo brings families together, teaches all ages about wildlife and inspires the next generation of wildlife enthusiasts and conservationists.

Engaging Exhibits

From water-walking basilisk lizards to giant Asian elephants, there is something exotic and exciting to see around every corner at the Tulsa Zoo. The Tropical American Rainforest building is an immersive exhibit with a lush rainforest canopy overhead and some animals roaming freely through the building, such as tropical birds, sloths and marmosets. Kept at a constant 80 degrees, the rainforest exhibit is a favorite for zoo goers in the hottest and coldest times of the year. The zoo's oceans and islands region boasts an African penguin exhibit and the Helmerich Sea Lion Cove, which recently opened in 2012. Both habitats feature underwater viewing windows so zoo guests can enjoy the undersea antics of these magnificent creatures. The Tulsa Zoo also features many "zoo favorites" such as tigers, lions, elephants, black bears, alligators, giraffes and zebras.

Opening in 2013 is the Robert J. LaFortune WildLIFE Trek, a four-building complex spotlighting plants and animals from around the world and how they survive life in the cold, life in the desert, life in the forest and life in the water. The keystone exhibit for this complex is the bear habitat with glass viewing windows allowing up-close encounters with Akoiah the grizzly bear.

The future is bright for the zoo in 2013 with construction continuing on the brand new Mary K. Chapman Rhinoceros exhibit, scheduled to open in 2014, and ground breaking on the Lost Kingdom Complex scheduled to open in 2015. The Lost Kingdom Complex will feature the Helmerich Tiger exhibit and the Hardesty Snow Leopard habitat, as well as Komodo dragons, Siamang monkeys and other animals from Asia.

Every Day is a New Day

Each day at the Tulsa Zoo is a new adventure with seasonal and varied zookeeper chats and animal demonstrations that are as much fun as they are educational. The elephant demonstrations are a must-see, featuring long-time resident Gunda, and artistic elephant Sooky, who is known for her signature canvas paintings. The sea lion demonstrations highlight the training techniques the zookeepers use with the zoo's resident sea lions, Briney and Dorsey. And no zoo visit is complete without a ride on the ONEOK Safari Train or the Arvest Wildlife Carousel. Other activities include camel rides, a rock climbing wall and a "frogger" trampoline jump. Each day the Tulsa Zoo offers families a new adventure and an opportunity to learn more about the world around them.

A Community Asset

The Tulsa Zoo is an asset to Tulsa and the surrounding communities. With more than 550,000 visitors annually, the zoo is the largest daily attraction in the region, generating over \$25 million to the economy each year. More than 14,000 households in the community are members of the zoo, which is operated by Tulsa Zoo Management, Inc., a 501(c)(3) nonprofit organization whose sole mission is to run, maintain and improve the zoo. The mission of the zoo employees is to inspire passion for wildlife in every guest every day.

The zoo is located north of the Tulsa International Airport at 6421 East 36th Street North, Tulsa OK, 74115. More information about the zoo's hours, prices and daily activities can be found online at tulsazoo.org or by calling 918.669.6600.



Trendy and traditional live side by side in the Brady, as many of the old warehouses are now home to businesses, non-profits, and apartments. And as of this year, the area eternally associated with red brick received a splash of green. Named after famed Oklahoma folk icon Woody Guthrie, the Guthrie Green is a block-sized oasis of grass and trees in the center of the district. Guthrie would certainly be proud, as the park exhibits every type of artistic expression you can imagine—from puppet shows to fireworks, and from reggae to Western Swing.

Despite all the “newness” going on, the twin pillars of the district remain the Brady Theatre and Cain’s Ballroom. Don’t let their enshrinement on the National Register of Historic Places fool you. Both are still thriving music venues. In fact, *CNN* ranked Cain’s number 8 on its Top 10 fabulous music venues in the nation. For you rock history buffs, Cain’s was one of only seven stops by The Sex Pistols during their only U.S. tour in 1978. Anarchy in the OK, indeed.



The Blue Dome was recently repainted in The University of Tulsa’s TU Blue.

In the Brady and Blue Dome Districts, the classic stands shoulder to shoulder with the contemporary, coming together to forge a whole even greater than the sum of its parts. That seems to be how we Tulsans do things. Again, it’s our personality.

Take for instance Theatre Tulsa. Founded in 1922, it is not simply the oldest community theatre company in Tulsa, or even Oklahoma for that matter. It’s the oldest west of the Mississippi. Ninety seasons in the game, it’s still going strong, and is joined by numerous local outlets for culture,

including Living Arts of Tulsa, Tulsa Symphony Orchestra, Tulsa Opera, and the Tulsa Ballet.

As much as there is to do Downtown, you might be perfectly content to simply walk around. From the breathtaking monasteries such as *Boston Avenue United Methodist* and *Holy Family Cathedral*, to magnificent living spaces like the Mayo Hotel and Philtower, incredible sights abound. Most of the time they’re adorned in the luminous Art Deco style for which we remain internationally known.

But let’s table this talk of history for a moment because we can’t leave Downtown without addressing the most noteworthy emblem of our future—the world-famous BOK Center. World famous because of the legends it attracts (Paul McCartney, The Who, Bob Dylan, Eric Clapton); the chart toppers it draws (Taylor Swift, Justin Bieber, Katy Perry, Lady Gaga); the sports it showcases (OKC Thunder preseason games, NCAA March Madness, Bassmaster Classic); and the unique events it hosts (Walking with Dinosaurs, WWE Raw, Batman Live). Flyover

Dollar Thrifty Automotive Group

Driven by the mission, “Value Every Time,” Dollar Thrifty Automotive Group’s brands, Dollar Rent A Car and Thrifty Car Rental, serve value-conscious travelers in more than 80 countries. Dollar and Thrifty have approximately 1,575 corporate and franchised locations worldwide, including approximately 600 in the U.S. and Canada. The company maintains a strong presence in domestic leisure travel in virtually all of the top U.S. and Canadian airport markets.

Dollar Thrifty’s 5,900 employees are located mainly in North America, but global service capabilities exist through an ever-expanding international franchise network. As of Dec. 31, 2012, Dollar Thrifty employed approximately 780 people in Tulsa where it is currently headquartered.

Dollar Rent A Car and Thrifty Car Rental were founded in 1965 and 1950, respectively. Dollar Thrifty Automotive Group was incorporated in 1997 and is the successor to Pentastar Transportation Group, Inc., which was formed in 1989 to acquire and operate the rental car subsidiaries of Chrysler.

On November 20, 2012, Hertz Global Holdings, Inc. acquired Dollar Thrifty. The combination of the two companies is poised to create a global, multi-brand rental car leader offering customers a full range of rental options through the strong premium and

value brands. The addition of the Dollar and Thrifty to Hertz’s family of brands provides Hertz with multiple strategic options to address both corporate and leisure business in all three tiers of the car rental market.

dollar.com thrifty.com



Monterea

country? Thanks to the BOK Center, the world's greatest acts can't wait to touch down in Tulsa.

So you've gotten a pretty good glimpse of Downtown. But as you can well imagine, there's plenty more personality to be found around and about the city. For instance, the bustling mile between 15th & Utica and 15th & Peoria.

We could have called it "15th Street", but that just wouldn't be Tulsa. So we named it Cherry Street. Has a nice ring to it. More importantly, it conveys the cozy nature of the place, which offers numerous choices for a unique gift, a delicious meal, or simply a warm cup of coffee, all within walking distance. Cherry Street is also home to perhaps Tulsa's most famous farmer's market.

Located just a few blocks from Cherry Street, Utica Square can best be described as the center for both fashion and the fashionable. It's home to the tres-chic Saks Fifth Avenue and Miss Jackson's as well as upscale grocer Petty's Fine Foods and eatery The Wild Fork. If you want to see and be seen, you want to be in Utica Square.

In the heart of downtown Tulsa sits the world-famous BOK Center.



Tulsa's Southern Hills Country Club.



There's plenty to see in Brookside as well. Known as "The Place To Be," Brookside is a lively destination for nightlife, (The Ivey Rooftop Wine Bar & Lounge); shopping, (Ida Red Boutique); and dining, (The Brook Restaurant & Bar and Wolfgang Puck Bistro). With one of only a few Wolfgang Puck Bistros in the country, Brookside is truly Tulsa's answer to the Sunset Strip.

Of course, for our money nothing enriches a city more deeply than a world-class museum. We have three. Philbrook Museum of Art is home to the widest and most magnificent array of art you will find in the region. Surrounded by gardens as vibrant as the artwork housed inside, Philbrook is truly the place to discover beauty in every form.

With the world's largest, most complete collection of art and artifacts from the American West, Gilcrease Museum is more than a Tulsa mainstay. It is a national treasure. As much as we enjoy visiting it ourselves, we are equally honored to steward it for those who visit it from around the world.

CONTINUED ON PAGE 20

Monterea: Tulsa's Premier Resort-Style Retirement Community

Monterea, Tulsa's most desired retirement address, combines all the advantages of maintenance-free living with new opportunities for self-expression and enjoyment. Here, residents enjoy the comfort and convenience of gracious apartment residences, spacious Garden Homes, and two breathtaking penthouses, as well as a range of outstanding services and amenities.



Residents of Monterea are able to live safely and securely, free from concerns about future long-term care. Monterea residents can be as active as they choose, enjoying amenities similar to those of a cruise ship, as well as the friendliness of a small village. Best of all, Monterea residents have the comforts of fine living without the responsibilities of home maintenance.

Exceptional amenities include the gorgeous City View lounge overlooking the Tulsa skyline, a library with a cozy fireplace, a cinema/media room, exercise studio, classroom, and an inspiring chapel. The outstanding Mirabella Salon and Day Spa offers massage therapy, acupuncture and reflexology, manicures, pedicures, and more. Separate facilities are available for men and women. Monterea also features a commons area with three restaurants, a multi-purpose theater, indoor swimming pool, card and game room, lounge, computer center, and salon.

In The Health Centers at Monterea, a full continuum of care is available including assisted living, skilled nursing, Alzheimer's/Dementia, and rehabilitation care.

Monterea opened in the fall of 2003 at 6800 South Granite Avenue, located off of 71st street between Yale and Sheridan. The beautiful setting, high atop a wooded hill in the heart of Tulsa, offers spectacular views of the city.

To tour Monterea, call 918.495.1500 or 888.795.1122 or visit monterea.net.



There is another nationally recognized museum we're proud to have, however this one has a little bit more "life" to it than either Philbrook or Gilcrease. The Tulsa Zoo and Living Museum continues to be one of the most popular places in town, attracting more than half-a-million visitors each year. And with new exhibits for Malayan Tigers and Komodo Dragons in development, we expect the Tulsa Zoo will be producing looks of wonder and awe for generations to come.

Say you want your learning to last longer than a Saturday afternoon. In other words, you're looking for a college. If you like big city amenities, but want to still have that comforting, college town vibe, please permit us to brag on our very own University of Tulsa (TU). Ranked in 2012 by *U.S. News and World Report* as the nation's 75th Best College, TU is one of the finest schools in the nation for budding artists, academics, and businessmen, and among the best in the entire world for engineers, particularly petroleum.

There's also Oral Roberts University, one of the world's most well known evangelical universities. In addition to its academic reputation, it's also a major contributor to the local scenery. ORU's variety of futuristic buildings are unlike anything you've ever seen at other colleges, while its giant bronze "Praying Hands" are a genuine local landmark.

Now, if we were to describe Tulsa's personality so far, the words that would most readily spring to mind are probably creative, exciting, ambitious, intelligent, energetic, classy, and classic. And yes,

our neighbors

BY HUNTER HOWE CATES BROTHERS & COMPANY

This being Green Country, it seems overly formal, maybe even stuffy, to call our outlying communities "Neighbors." Yes, each has its own unique customs, histories, and of course, high school football teams. But the ties that bind us are so strong that perhaps a more congenial term is in order. Our "Extended Family" perhaps?

Tulsa, Jenks, Bixby, Broken Arrow, Owasso, Sand Springs, Sapulpa. The names certainly sound related, don't they? And the residents of each share familial traits that make our little corner of the map unlike any in the state. Or the country for that matter.

By offering a lifestyle that blends a touch of country living with amenities that are as modern as you'll find anywhere, each has grown significantly over the years. Wide-open spaces for the kiddos to run around and play, with a grocery store that's still just a few miles down the road. Can't beat it, right?

Couple this with ambitious, high-quality schools and a manageable 15-30 minute drive to the big city, and it's easy to see why even folks who work in Tulsa, live and play in one of our relatives' communities.

So if our suburban fellows will permit us, we'd like to call them our family. And like any proud parent should, we'd like to brag on them a bit.



Jenks features a picture postcard downtown, offering more shops and malls than can be visited in a day.

Jenks

Let's start with the biggie; Money magazine has ranked Jenks as one of their top places to live in the country. Their reasoning is simple; high average salaries, low home prices, and a list of things-to-do that would impress even a denizen of the big city. Frankly, we couldn't agree more with their conclusion.

Of course, it's not just the town that's getting noticed. For years, the Jenks High School Trojans have earned national attention for their famed football program. In a part of the country known for Friday Night Lights, Jenks' shine brighter than most.

Speaking of bright, how about Jenks' students? For their academic muster, as well as the district's community responsiveness, the Jenks Public School System is the proud recipient of the coveted Malcolm Baldrige National Quality Award. Turns out they're just as good with the books as they are on the gridiron.

An idyllic home for families, Jenks also features a picture postcard downtown, offering more shops and malls than can be visited in a day. If you're looking for a more contemporary shopping experience,

Jenks Riverwalk Crossing offers an impressive array of stores and restaurants. And while Oklahoma is still a landlocked state, you might forget that comforting fact when face-to-face with a nurse shark. Fortunately, it's through glass at the nationally renowned Oklahoma Aquarium.

Money magazine certainly had it right, if we may say so ourselves. Though we think the other five cities in the Tulsa metro area are pretty fantastic places to live as well.

Bixby

Take for instance Bixby, which has an equally impressive stat to tout. It's Oklahoma's fastest-growing city. Of course, being a humble Green Country town, Bixby hasn't let its growth go to its head. It has never lost that small town charm that attracted so many people in the first place.

Bixby hasn't just attracted new residents though. It has also attracted such national acts as ZZ Top, Stone Temple Pilots, and Lynyrd Skynyrd to the Spirit Bank Event Center. With 4,500-seats and at a cost of \$50 million, this facility rivals the arenas found in many larger cities.

Purposed with a proud agrarian heritage, Bixby remains the metropolitan area's produce center, with surrounding farmland offering some of Oklahoma's finest vegetables. Like the food they farm for the rest of us to enjoy, Bixby is growing and growing. So fast in fact, they might need to build a bigger stadium for their beloved Bixby High School Spartans.

we did try to narrow it down as much as possible. But there's still one word missing, arguably the one which defines us better than any other—friendly.

Sure there's plenty to see and do, but it is the friendliness of our town that makes it such an unbeatable place to live. It's this friendliness and comfort you'll find in every neighborhood, large and small. From the stately beauty of Swan Lake, to the majestic mansions of Maple Ridge, the sprawling ranch houses of Southern Hills, to the cozy cottages surrounding the University



of Tulsa, whatever your lifestyle or price range, Tulsa is a remarkable place to call home.

Personality. It's a unique thing. If we were to try and describe Tulsa's in one sentence, or even one article, we'd probably come up short. It's something you just have to see and hear and feel for yourself. Fortunately, one visit here and you'll sense it instantly. It's all around you—in our history, our businesses, our cultural landmarks, our neighborhoods, and especially, especially, our people. ♦

Broken Arrow

Take the expressway that bears its name (affectionately known as "The B.A.") and you'll find yourself in Tulsa County's second most populous city, Broken Arrow.

With such a noteworthy distinction, how appropriate then that it's also home to one of the area's fastest-growing institutions of higher learning, Northeastern State University's Broken Arrow campus. That's of course in addition to Broken Arrow High School, one of the finest in the state, and home to the Tigers.

There is quite a lot to recommend about Broken Arrow, from a charming downtown, to Blue Bell Creamery, one of the city's biggest employers. However, we would be remiss if we left out perhaps this city's biggest attraction: Bass Pro Shop. Rarely does a store have the notable distinction of being a tourist attraction. But for outdoor lovers of all ages, it's the third best place in the world to be, behind only the woods or waters around Oklahoma.



Broken Arrow's charming downtown.

Owasso

Travel north down Highway 169 and you'll find yourself in Owasso, a town that ambitiously calls itself "The City Without Limits." And that ambition has manifested itself in impressive growth over the past few years, highlighted by hundreds of new homes being built.

As you can imagine, the people living in said homes are doing fine, with a median family income of \$80,000. Little wonder then that Owasso abounds with no shortage of retail options and dining opportunities.

With an excellent public school system, Oklahoma's largest community-built playground, and a city government focused intently on the road ahead, Owasso's potential is, indeed, limitless.

Sand Springs

Founded by philanthropist Charles Page in 1911 and incorporated as a city in 1912, Sand Springs gives proof to the maxim that a city is built by its people. And after 100 years, they've certainly built a lot—like a variety of shopping options and recreational activities dotting the landscape, including the Canyon at Blackjack Ridge, 18 holes of remarkable vistas and incredible golf. Strengthened by marvelous public schools and a solid industrial base, spearheaded by Webco Industries, a bright future awaits Sand Springs in her next 100 years.



Sapulpa

Sapulpa is known as the city of connections because it is the intersection of several major interstate, state, and local highways. Of course, it isn't merely a stopping ground. With more than 100 manufacturers employing 5,000 men and women, Sapulpa stakes its claim as an important destination unto itself. This fact is seen most notably in its downtown, home to both rich architecture and numerous successful family businesses.

Sapulpa's identity as a bastion of grassroots commerce has been a part of its DNA since the beginning. The town was established as a trading post in 1850 by Chief Sapulpa, a man whom Sapulpa High School honors with its nickname Chieftains. Even as it moves into its third century, Sapulpa is able to retain its small town ambiance, while enhancing it with outdoor amenities such as trout fishing and golf.

Through the strength, vigor, and diversity they bring to the metropolitan area, the towns that surround Tulsa have truly empowered the Green Country community as a whole. For that, and for reasons too numerous to list here, we're thankful to each. They enrich the area we all call home, and we look forward to seeing them grow bigger and better with each passing year. After all, we're family.

sports

There seems to be something valid about the phrase lifted from the classic baseball movie, *Field of Dreams*, uttered by famous movie star, Kevin Costner (who played Ray Kinsella), "build it and they will come."

At least the city of Tulsa has certainly bought into it.



Tulsa University's new head basketball coach Danny Manning.

The greatness of any incredible whole is always derived by the sum of its equally important parts. That would describe our city's sports environment in a ballpark peanut shell. Mainly because Tulsa is a terrific big-time sports town primarily due to all of the little bodies of work that make it so. Those little bodies (well, they're actually quite large) are those bodacious bastions built for big time battles known as our fan-friendly sports facilities.

To wit: the crown jewel of Tulsa's sports venues has to be the world-renowned BOK Center. Home to professional hockey (Tulsa Ice Oilers), NBA basketball (OKC Thunder exhibitions), our WNBA franchise, (Tulsa Shock), college basketball (Conference USA tournament, March, 2013), NCAA basketball regionals, and much, much more. The downtown arena is positioned perfectly for any local, regional, and national sports event because there's truly not a bad seat in the house.

The University of Tulsa Division 1 football team plays in its brand new, 30,000-seat Chapman Stadium with Hurricane basketball (now coached

by NBA legend Danny Manning) competing in the 8,600 seat, plush field house, the Reynolds Center. Oral Roberts University's home hoops floor is the spectacular Mabee Center. Tulsa's AA baseball team (the Drillers/a Colorado Rockies' farm team) consistently draws record-setting crowds every year in a sparkling new facility featuring a grand slam view of the city's downtown skyscrapers. And, the new Spirit Bank Center in neighboring Bixby is the proud home to Tulsa's National Basketball Association Development League (NBADL) 66ers.

We routinely sponsor (thanks to the world-class Southern Hills Country Club) professional golf tournaments at the highest level. And Tulsa, along with nearby Grand Lake, is the official site of the 2013 Bassmaster's Classic, the largest, most prestigious fishing event in the country. More than 70,000 participants and fans are expected to attend the three-day event, swelling local hotel, restaurant, and other entertainment coffers by millions of dollars.

The Tulsa Drillers, Colorado Rockies AA affiliate hosted the 2012 Texas League All Star game in it's new downtown ballpark.





Our WNBA franchise, Tulsa Shock, is in its third season, playing in the BOK Center.

But there's so much more.

Every January, the Chili Bowl returns for four days of thrill-a-minute midget racing at the spacious (and deafening) QuikTrip Center at the Tulsa Fair Grounds that attracts rabid race fans by the tens of thousands. In fact, if you don't already have a ticket two months in advance, chances are better than good you'll be waiting for next year—it's that popular! The Chili Bowl Midget Nationals is the biggest midget car racing event of the year, once

referred to as the "Super Bowl of midget racing" by current NASCAR star and former midget racer Jason Leffler. Leffler is hardly the only NASCAR racer you'll see (Tony Stewart is also a frequent participant). No matter where they race now, drivers with a history in midget cars can't fight the call of the Chili Bowl.

If Chili is your thing, then you'll also love a little dirt in your face! Tulsa plays host to BMX and Freestyle Motocross stunt cycle events along with several national horse shows each year. Like to scrum? The Tulsa Rugby Club plays a full schedule along the river and the lads are always ready for some rough and tumble (but fan-friendly) action.

But let's not kid around here. Actually, let's do. Literally. Tulsa is home to a vast array of fabulous venues for both youth soccer and baseball. Today, more than 75,000 kids participate in hundreds of soccer and baseball leagues all over Tulsa, Jenks, Broken Arrow, Owasso, Bixby, and other close-by communities. In fact, Tulsa is one of the

largest kid soccer cities in America based on total population. Add in youth basketball, ice hockey, volleyball, tennis, golf, swimming, and wrestling and Tulsa is perfect for every sort of family sport opportunity. Not to mention—but we will—even a world-class Frisbee golf course next to the Arkansas river that attracts thousands of Frisbee throwers annually!

So what's your pleasure? Entertainment? Exercise? Fanaticism? Or simply a different way to spend an afternoon or evening? Whatever floats your boat (did we tell you about all of the lakes that surround Tulsa?) you'll find it right here and, most likely, you'll be enjoying it in a brand new setting. It's just one more reason why so many people choose to make Tulsa their home. ♦



climate

Following one of the hottest summers ever recorded in Tulsa, fall of 2011 arrived just in time with its cooler weather. As is the case many years, fall was uneventful with about normal temperatures and rainfall.

As the meteorological season changed from fall to winter, the warm and dry weather returned. December saw much above normal temperatures, and was about one inch below the normal monthly value for precipitation. Tulsa ended 2011 almost nine inches below its normal precipitation value of 40.93 inches. January and February were above normal with regard to temperature and below normal for precipitation.

The winter of 2011-2012 was the sixth warmest all time with temperatures averaging 67.2 degrees. Almost no snow fell during the winter months, as only 1.7 inches were recorded.

Springtime in Tulsa means rain and thunderstorms, typically. Again the warm and dry pattern held true, as all three spring months were above normal temperature wise and below normal in rainfall. March, which sometimes brings the most snow and ice to Tulsa, was the warmest ever on record in 2012, with an average temperature of 61.5 degrees. That's 10 degrees over the normal March temperature! April and May were warm too, and overall the spring of 2012 was the warmest ever recorded.

TULSA CLIMATE MONTHLY SUMMARY 2012 REPORT

MONTH	HIGH TEMP	LOW TEMP	AVERAGE TEMP	RAINFALL	SNOWFALL
January	76	7	34.1	.57	3.6
February	79	-12	38.6	2.57	22.5
March	84	24	52.5	1.00	0.0
April	90	36	63.4	5.41	Trace
May	93	38	68.6	3.58	Trace
June	106	63	84.4	1.47	0.0
July	107	72	90.9	.36	0.0
August	113	62	87.6	5.76	0.0
September	102	47	70.7	2.58	Trace
October	91	30	63.4	1.87	0.0
November	77	23	50.9	5.37	0.0
December	70	18	42.5	1.45	Trace

Precipitation: Inches.

Temperature: Fahrenheit.

Source: National Oceanic and Atmospheric Administration (NOAA).

National Climatic Data Center, 2012.

The summer of 2012 was once again one of the warmest on record. Average temperatures for the months of June through August proved to be the sixth warmest ever. The combination of prolonged hot and dry weather throughout most of the year led to the onset of a serious drought, with the impacts felt economically, in water use and storage, and in agriculture.

The weather has been anything but normal the past few years. ♦

Weather Information

National Weather Service website:

nws.noaa.gov

Learn more about tornadoes and thunderstorms from these websites:

The National Severe Storms Laboratory,
Norman, Oklahoma:

nssl.noaa.gov

The National Weather Service
Storm Prediction Center,
Norman, Oklahoma:

spc.noaa.gov



A graphical look at 2012's temperature and rainfall.

The graphs below show a more in-depth look at the temperatures and rainfall in Tulsa during the months of January through September 2012.

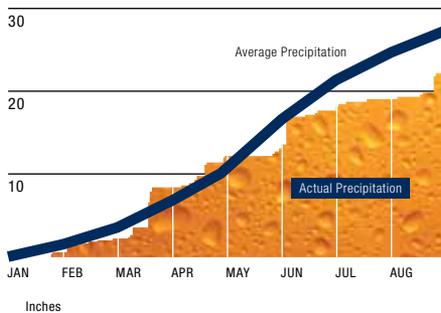
The temperature graph above shows daily highs and lows as depicted by the dark blue lines. The light tan colors in the middle show the daily average.

The graphs show the positive temperature departures during the winter months, followed by cooler weather in the middle of February. The nearly constant warmer than normal weather followed by cooler than normal temperatures is fairly common. Of particular note is the consistently well above normal temperatures during the summer months. In fact, close examination reveals that every daily high temperature during the summer was above normal, and almost every daily low was above its normal. This is due to the large buildup of heat that occurs during heat waves. Typically, the earth

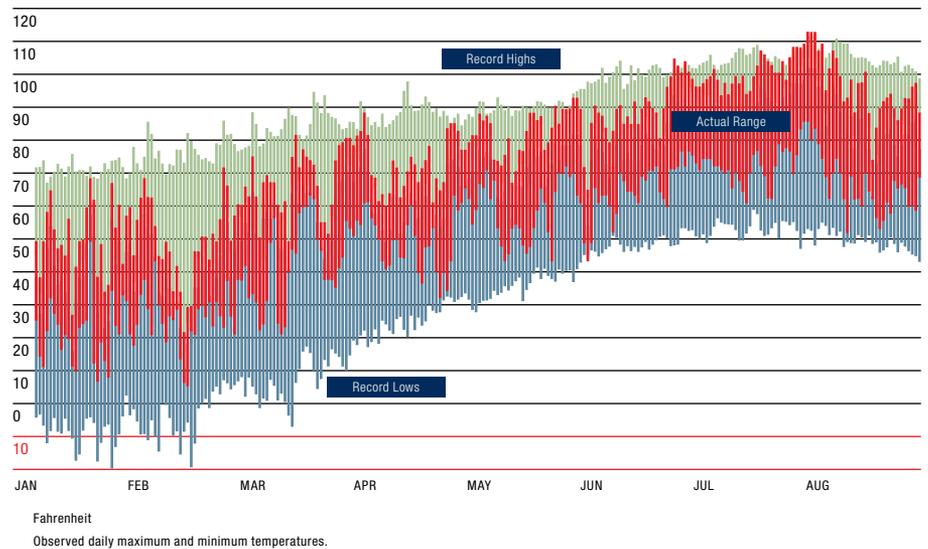
radiates the sun's energy during the nighttime hours. During prolonged periods of above normal temperatures, the buildup of heat continues and the trend of hot weather becoming even hotter remains.

The precipitation graph shows about normal rainfall through the middle of May, at which point the dry weather, which corresponds to the hot temperatures, commences. The combination of very hot weather, combined with the lack of rainfall, produced one of the worst droughts in recent history. ♦

TULSA AREA PRECIPITATION 2012



TULSA TEMPERATURE SUMMARY 2012



demographics

TULSA POPULATION TREND

YEAR	CITY	COUNTY	MSA ¹
1900	1,390	NA	NA
1907	7,298	21,693	121,878
1910	18,182	34,995	159,588
1920	72,075	109,023	321,213
1930	141,258	187,574	416,847
1940	142,157	193,363	400,584
1950	182,740	251,686	422,350
1960	261,685	346,038	503,090
1970	330,350	399,982	572,548
1980	360,919	470,593	711,652
1990	367,302	503,341	761,019
2000	393,049	563,299	859,530
2010	391,906	603,403	937,478
2011	396,466	610,599	946,962

¹ Tulsa MSA represents Creek, Okmulgee, Osage, Rogers, Tulsa, and Wagoner counties.
Sources: U.S. Census Bureau and Oklahoma State Data Center. Prepared by Research Wizard, Tulsa City-County Library.

TULSA TOTAL PERSONAL INCOME

YEAR	COUNTY	MSA ¹
1995	12,995,203	17,619,732
1996	13,958,907	18,872,739
1997	15,019,409	20,265,757
1998	16,394,011	22,016,527
1999	16,918,442	22,816,036
2000	18,400,529	24,813,778
2001	19,670,603	26,629,053
2002	19,192,935	26,297,315
2003	19,297,398	26,535,366
2004	20,989,144	28,614,410
2005	22,560,933	30,734,136
2006	25,321,413	34,392,538
2007	25,922,322	35,773,193
2008	29,496,469	40,197,649
2009	24,596,422	35,072,287
2010	25,710,797	36,564,996
2011 <i>Estimate</i>	26,512,923	37,705,751

Amounts are in thousands of dollars.

¹ Tulsa MSA represents Creek, Okmulgee, Osage, Pawnee, Rogers, Tulsa, and Wagoner counties.

Source: U.S. Bureau of Economic Analysis—Regional Economic Information System & Tulsa Regional Chamber.

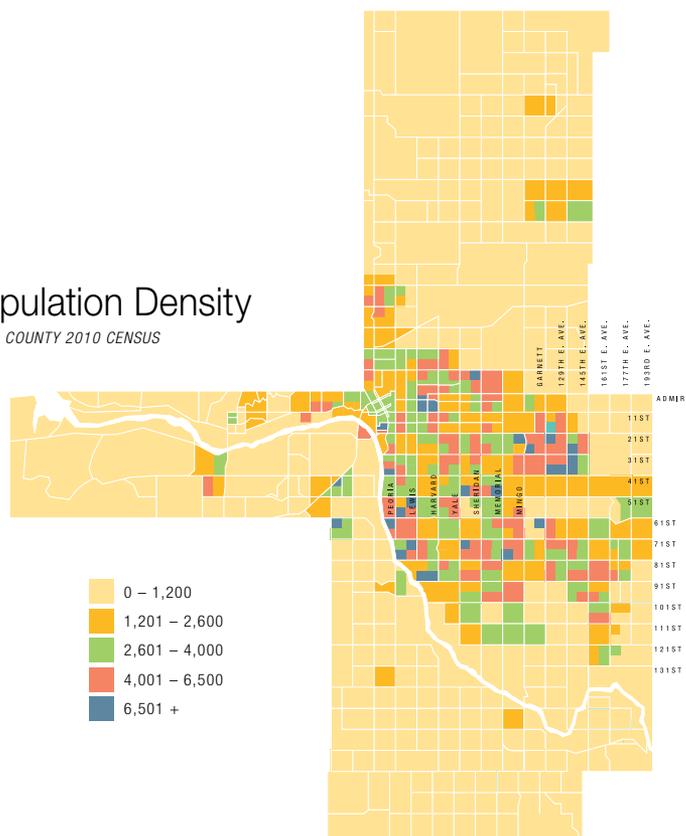
The Tulsa Metropolitan Statistical Area (MSA) is made up of Tulsa County and six surrounding counties: Creek, Okmulgee, Osage, Pawnee, Rogers, and Wagoner. According to the Census Bureau, the 2010 population count for the Tulsa MSA was 937,478, an increase of nearly 78,000 people since 2000. More recent estimates show the MSA population growing to 946,962, an increase of nearly 9,500 people since 2010. Tulsa County claims 64.5 percent of the MSA population, with a population estimate of 610,599 in 2011.

The City of Tulsa's 2010 population was reported by the Census Bureau to be 391,906. The 2011 population estimate for the City of Tulsa shows our area growing by more than 4,500 people to a total of 396,466. Reports for several of the surrounding communities, based on 2011 estimates, list population in Bixby, 21,137; Broken Arrow, 100,073; Collinsville 5,672; Glenpool 10,938; Jenks, 17,130; Owasso, 29,854; Sand Springs, 19,140; and Sapulpa 20,691.

The American Community Survey 2006-2010 estimate reports that more than 27 percent of the City of Tulsa population was less than 19 years of age, whereas 13 percent of the population was 65 years and over. Our aging population is evident with the majority of our population growth in the older age brackets; 12 percent growth in the 50 to 54 year old group, 32 percent growth in the 55 to 59 year old group, and 33 percent growth in those 60 to 64 years of age. Those persons 80 years and over have increased by more than 16 percent since 2000.

Population Density

TULSA COUNTY 2010 CENSUS



TULSA PER CAPITA PERSONAL INCOME

YEAR	COUNTY	MSA ¹
1995	24,467	21,868
1996	25,951	23,120
1997	27,508	24,435
1998	29,562	26,115
1999	30,121	26,697
2000	32,640	28,812
2001	34,743	30,693
2002	33,721	30,059
2003	33,950	30,237
2004	37,074	32,590
2005	39,706	34,812
2006	44,036	38,470
2007	44,533	39,466
2008	50,121	43,859
2009	41,148	37,719
2010	42,468	38,894
2011 <i>Estimate</i>	43,421	39,818

Amounts are in thousands of dollars.

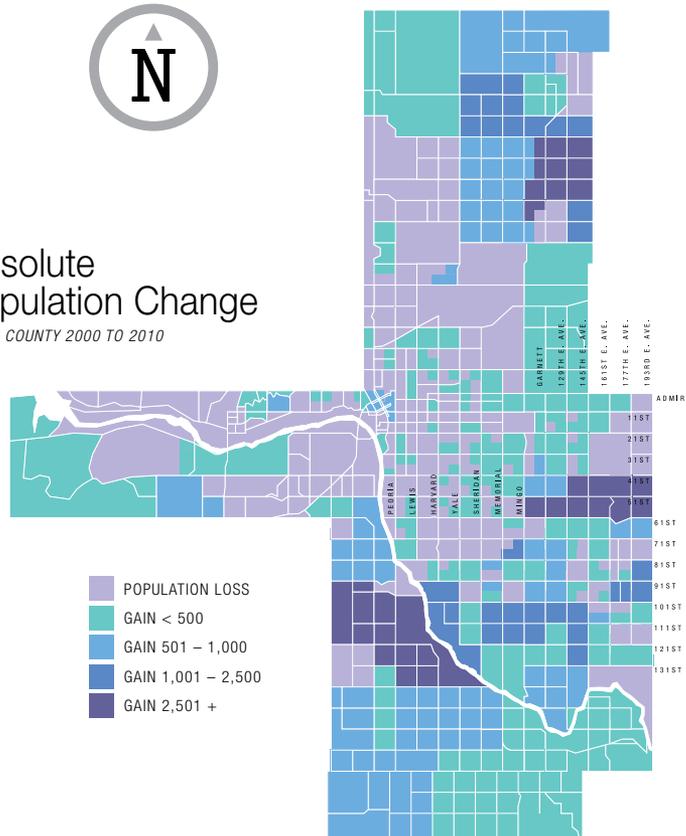
¹ Tulsa MSA represents Creek, Okmulgee, Osage, Pawnee, Rogers, Tulsa, and Wagoner counties.

Source: U.S. Bureau of Economic Analysis—Regional Economic Information System & Tulsa Regional Chamber.



Absolute Population Change

TULSA COUNTY 2000 TO 2010



Minorities represent more than 37 percent of the City of Tulsa population, with African American (15 percent) and other races (8 percent) as the largest proportionate groups. The Hispanic community continues to grow, accounting for more than 14 percent of the City of Tulsa's population and increasing by more than 96 percent from 2000 to 2010 

Prepared by INCOG.

Source: 2010 Census.

Geography: 2010 Block Groups.

education

It is not a surprise that Tulsa is considered a city of energy. Our history is well-known and symbols of that legacy are present all over town. The forms that energy is taking to promote Tulsa on the national stage may be surprising to those who do not closely follow the education scene. Despite this, educational reformers nationally are looking at the efforts and energy of our schools and school leaders and are taking note of partnerships with the Bill and Melinda Gates Foundation, new approaches to technology within the education system, and innovative schools that provide far more for their students than a mere ability to pass a test at a particular place and time.

I run one such organization: Monte Cassino School, a pre-kindergarten through eighth grade Catholic school that focuses on the development of reading, writing, math, and the sciences for students of all faiths and backgrounds. Monte Cassino serves approximately 850 students in and around the



Tulsa area and prepares them for a successful transition to local area high schools, both private and public. Fifty-three percent of eighth grade graduates at Monte Cassino score “college-ready” in two or more of these core subjects on their Explore tests, a precursor to the ACT, even before they set foot on a high school campus.

Monte Cassino’s achievements are not merely a reflection of one school’s approach; in contrast they are achieved through professional development and education for our staff through the area’s outstanding higher education system. Both Oral Roberts University and the University of Tulsa provide rigorous undergraduate educations that produce caring citizens who are well-prepared for the workforce. In addition to these, Oklahoma State University and the University of Oklahoma maintain Tulsa campuses, which provide health care-related classes and degrees as well as graduate studies for a wide variety of professions. Tulsa Community College, the largest community college in the state, offers affordable and appropriate classes to best serve local needs. The colleges also provide invaluable services to the local elementary and secondary schools: Northeastern State University provides reading intervention services to students through teaching labs at both its Broken Arrow and Tahlequah locations.

Tulsa Public Schools is one of the many school systems that sees tremendous benefit from the influence of higher education. As the second largest school district in the state, Tulsa Public Schools serves as a leader in educational development and innovative curriculum design. Recent endeavors include the Tulsa Community School Initiative, which focuses on seven core components: early care and learning, health education, social services, youth development, neighborhood development, and lifelong learning. Tulsa Public Schools has partnered with the Bill and Melinda Gates Foundation to create a teaching and learning effectiveness initiative that is now favored by more than 90% of the school districts in the state and is being assessed nationally by many educational reform groups.

Tulsa Public Schools also has a robust partnership with the Teach for America program, which provides approximately 150 teachers each year to serve in high-needs schools. Just this summer, Teach for America selected Tulsa as its site for their annual teacher-training institute, which allowed more than 650 Teach for America students to experience and share their talents with needy students in the Tulsa area. This type of national recognition is nothing new for Tulsa. Several schools in the region have achieved Blue Ribbon status, a distinction given to schools that either show dramatic gains in testing or that score in the top ten percent on standardized assessments. These schools include: Booker T. Washington High School, Holland Hall Middle School, the School of Saint Mary, Carnegie Elementary, Monte Cassino School, Saint Pius X School, and Carver Middle School.

The school district’s commitment to growth and expansion is reflected in the community: Tulsa voters recently approved a \$350 million bond issue, the largest in the history of the state, to ensure continued services for the city’s youth.

There are a number of growing districts in the Tulsa metro area, including Union Public Schools,

TULSA COUNTY PUBLIC SCHOOLS

SCHOOL DISTRICTS	ENROLLMENT
Tulsa	41,501
Broken Arrow	16,732
Union	14,931
Jenks	10,371
Owasso	9,143
Sand Springs	5,159
Bixby	5,027
Collinsville	2,560
Skiatook	2,413
Glenpool	2,637
Sperry	1,226
Berryhill	1,221
Liberty	604

Schools with grades K-12.

Data based on October 2012 enrollment.

Source: Oklahoma State Department of Education, School District Database. Compiled by Research Wizard, Tulsa City-County Library.

Jenks Public Schools, Broken Arrow Public Schools, Bixby Public Schools, and Owasso Public Schools, ensuring that regardless of location, there are quality schools available within a close area.

Tulsa also offers a number of private schools that provide specialized offerings from both a spiritual and academic approach. There is a large contingent of Catholic schools, including Saint Catherine, Saints Peter and Paul, Holy Family Cathedral School, the School of Saint Mary, Marquette School, Saint Pius X School, and Monte Cassino School. Two Catholic high schools, Bishop Kelley and

Cascia Hall, provide rigorous college preparatory environments for their students. Other private schools include Holland Hall, Metro Christian, Lincoln Christian, Mingo Valley Christian School, Peace Academy, Regent Preparatory School, Victory Christian School, Wright Christian Academy, and Riverfield Country Day School, all of which offer pre-kindergarten through high school programs.

Tulsa is also the home to the Mizel Jewish Day School, two Montessori schools, and two schools that focus on students with different learning needs: The Little Lighthouse (primarily

for students living with autism, Down syndrome, cerebral palsy, and other challenges) and Town and Country, a school designed to specifically help students with learning disabilities and difficulties.

Overall, Tulsa provides a vigorous educational system that is nationally recognized and locally supported to ensure that all students have a bright future formed from a successful foundation. With the quality of the people produced by the higher education system within Oklahoma, those of us who live here can only comment in one manner: we are not surprised. ♦

Tulsa Community College

At Tulsa Community College (TCC), we believe learning is a lifelong pursuit with limitless possibilities. Yes, some students come here directly from high school and thousands of them are in the Tulsa Achieves Program that pays 100 percent of their tuition and fees. But TCC's reach extends further.

In the past year, 60 percent of the students who attended TCC were 22 years old or older. These students trained for careers in emerging fields such as engineering. They took undergraduate classes in preparation to attend four-year universities and they enhanced their resumes with professional development skills taught by top-quality professors. But that isn't all.

TCC makes learning accessible to the entire community—even those who aren't necessarily students. In the past year, TCC has offered opportunities to hear from world-renowned experts such as Temple Grandin; to turn entrepreneurial dreams into realities through programs such as TCC StartUp Cup, Powered by Lobeck Taylor Family Foundation; and to live greener through events such as EcoFest.



Through partnerships with other educational institutions, such as Tulsa Public Schools, and businesses across the city, TCC is using its resources to cultivate meaningful relationships that benefit students, business, industries, and the community as a whole. Working together to

produce an educated workforce that contributes to Tulsa's economic base and ensures a thriving future for our city is what makes TCC a success.

TCC is Tulsa's community college, and we thank you for sharing our belief in lifelong learning.

Riverfield Country Day School



Innovative education for Infants – 12th Grade

With a mission of providing an excellent education in a family-oriented atmosphere, Riverfield Country Day School offers a caring and creative faculty and challenging, integrated, and personalized curriculum to promote the development of the whole student. Founded in 1984, the school currently serves more than 570 students from infancy through Upper School.

The Pre-School philosophy is inspired by the Reggio Emilia approach— a student-centered, inquiry-based learning model. The school is known nationally as a benchmark for early childhood education experiences. This approach also filters into the Primary School, which uses Reggio concepts in conjunction with Literacy First and Everyday Mathematics curricula.

In addition to required courses, older students can participate in the arts, speech and debate, home economics, personal finance, and a variety of other activities. The school's Rock Band and drumline are popular choices. Several OSSAA sports including eight-man football, basketball, and soccer are offered for various age groups.

Riverfield helps students reach their potential through small class sizes and positive collaborative relationships. Many classrooms are multi-age, which creates mentoring and leadership roles. A love of nature is nurtured on the school's 120-acre campus, featuring a vast network of trails and other outdoor learning opportunities. The school embraces family, innovation, and excellence. These are the foundations of "The Riverfield Way."

Riverfield is accredited by the Independent Schools Association of the Southwest (ISAS) and the National Association for the Education of Young Children (NAEYC). For more information, visit riverfield.org or call 918.336.3553.

HIGHER EDUCATION INSTITUTIONS IN TULSA 2012-2013

INSTITUTION	BUDGET (\$) 2012-2013	ENROLLMENT Fall 2012	FACULTY Fall 2012
Langston University—Tulsa ¹	69,853,514	2,566	146
Northeastern State University—Broken Arrow ¹	90,620,271	8,757	523
Oral Roberts University	100,373,993	3,335	270
OSU Center for Health Sciences	139,863,505	457	107
OSU-Tulsa	25,270,212	3,181	251
OU-Tulsa	137,000,000	1,641	293
Rogers State University	35,898,244	4,646	457
Tulsa Community College (TCC)	112,419,450	18,981	1,129 ²
University of Phoenix	NA	1,200	140
University of Tulsa	187,000,000	4,334	322

¹ Data for all campuses.

² Includes full and part-time faculty, except University of Phoenix and The University of Tulsa data is full-time faculty only.

Source: Research Wizard, Tulsa City-County Library, 2012.

HIGHER EDUCATION DEGREE PROGRAMS IN TULSA

INSTITUTION	ARTS	BUSINESS	SCIENCE	SOCIAL SCIENCE & EDUCATION	GRADUATE
Langston University—Tulsa	3	5	4	2	4
Northeastern State University—Broken Arrow	9	9	6	9	17
Oral Roberts University	28	6	13	14	15
OSU Center for Health Sciences	NA	NA	NA	NA	4
OSU-Tulsa	5	8	5	10	31
OU-Tulsa	1	NA	3	2	26
Rogers State University	13	21	10	13	NA
Tulsa Community College (TCC) ¹	11	35	51	50	NA
University of Phoenix	2	10	5	3	4
University of Tulsa	11	6	19	25	52

¹ Institution grants associate degrees only.

Source: Research Wizard, Tulsa City-County Library, and Tulsa City Council, 2011.

MAJOR PRIVATE SCHOOLS IN TULSA COUNTY 2012-2013

NAME OF SCHOOL	GRADE LEVEL	ENROLLMENT
Victory Christian School	Kindergarten-12	1,296
Metro Christian Academy	Kindergarten (age 4)-12	1,000
Holland Hall School	Preschool (age 3-4)-12	991
Monte Cassino School	Pre-kindergarten-8	830
Bishop Kelley High School	9-12	817
Lincoln Christian School	Pre-kindergarten-12	800
Cascia Hall Preparatory School	6-12	552
Riverfield Country Day School	Infant-12	563
Summit Christian Academy	Kindergarten (age 5)-12	458
Marquette Catholic School	Kindergarten-8	405
St. Pius X Catholic School	Pre-kindergarten-8	392
All Saints Catholic School	Pre-kindergarten-8	354
Mingo Valley Christian School	Kindergarten (age 4)-12	295
School of Saint Mary	Pre-kindergarten-8	262

Private schools with grade levels from preschool to sixth grade or higher.

Source: Research Wizard, Tulsa City-County Library.

Oklahoma State University in Tulsa



OSU-Tulsa.

An integral part of Tulsa's thriving downtown, Oklahoma State University offers high-quality degrees to Tulsa-area students that strengthen our economy and benefit our community. Together, OSU-Tulsa and OSU Center for Health Sciences (CHS) make a significant impact in Tulsa. OSU graduates are highly attractive to employers and

a valuable addition to our workforce, while OSU's faculty members create new products and jobs through innovative research and partnerships with local industry leaders.

OSU-Tulsa focuses on junior-, senior- and graduate-level education, providing opportunities for students to complete bachelor's, master's and doctoral degrees in a variety of programs. With a low student-to-faculty ratio, students receive individual attention and innovative assignments. Students earn a respected degree from a Big 12 university right here at home and graduates leave OSU-Tulsa with an internationally recognized OSU degree—the same degree students in Stillwater receive.

U.S. News & World Report ranked OSU Center for Health Sciences as the nation's most popular medical school in 2012. OSU-CHS offers graduate-level degrees (D.O., Ph.D. and M.S.), including osteopathic medicine, forensic sciences, biomedical sciences and health care administration. The OSU College of Osteopathic Medicine, one of only 33 in the nation, has expanded its enrollment to 115 medical students each year and places an emphasis on serving rural and underserved Oklahoma.

OSU is leading public university research for economic development in Tulsa and northeastern Oklahoma with the Helmerich Research Center at OSU-Tulsa and the Forensic Sciences and Biomedical Research Center at OSU-CHS.

The OSU-Tulsa campus is adjacent to ONEOK Field and is just minutes from the BOK Center, the Cain's Ballroom, the Blue Dome District, the Brady Arts District, and many other restaurants and venues. The CHS campus is located at 17th and Southwest Boulevard and is just across the Arkansas River from the OSU Medical Center, which provides residencies for many OSU physicians.

To learn more about OSU in Tulsa, call 918.594.8000 or visit osu-tulsa.okstate.edu.



OSU Center for Health Sciences.

Cascia Hall

Preparing Students for College and For Life

Cascia Hall is a Catholic, college preparatory school for students of all faiths in grades 6-12. Students are prepared for college and for life in a supportive, Christian community which focuses on the Augustinian values of Truth, Unity, and Love. Cascia Hall balances rigorous academics with excellent opportunities in athletics, the arts, and community service. With a student:teacher ratio of 12:1, students are related to as individuals, resulting in higher motivation and levels of success.

Preparation for college begins in grade 6 with a seamless traditional liberal arts curriculum through grade 12. Each class is aligned year after year to create pathways for students to reach their goals. Students in Grades 6-8 have opportunities to earn high school credit in math, science, and world language. Students in Grades 9-12 can earn college credit in the extensive Advanced Placement program as well as in concurrent enrollment with various surrounding

two- and four-year colleges and universities. The school recently opened a state-of-the-art digital, multimedia lab for instruction in world languages for all grades.

The athletic program offers opportunities for students to participate at all levels and in every season. Since joining the Oklahoma Secondary Schools Activities Association in 1976, Cascia



Seventeen percent of the senior class was recognized by the National Merit Scholarship Corporation for their performance on the qualifying exam: 13 students were named Semifinalists; 3 students were Commended; 1 student earned National Achievement recognition.

Hall has earned 57 State Championships in 12 different sports as well as numerous runner-up titles. The Cascia Hall Performing Arts Center enjoys the spotlight as one of the region's most sophisticated environments for training in the visual and performing arts. Students can participate in numerous extracurricular activities which include Academic Bowl, Student Council, World Language Clubs, Dance Team, Chess Club, Bowling, Bell Choir, Art Club, Pep Band, Literary Magazine, The Cascian (student newspaper), and Key Club. All members of the Cascia Community are encouraged to perform Christian Service to their school, church, and community. Upper School students must fulfill a Christian Service requirement in order to graduate.

Visit the website for a complete listing of academic, athletic, and extracurricular offerings, or contact the Office of Admissions for a prospectus.

casciahall.org

918.746.2600

Oral Roberts University

“Make No Little Plans Here”

This powerful challenge of ORU's founder, Oral Roberts, is central to the DNA of the university bearing his name. Oral Roberts University is a world-renowned Christian university that focuses on building spirit-empowered leaders to impact their world. Graduates launch from ORU prepared to achieve their dreams because of a unique education centered on the whole person—mind, body, and spirit.

ORU offers 62 undergraduate majors, 60 minors, and a broad range of respected pre-professional programs. There are 14 master's degree options in business, education and theology and doctoral degree options in education and theology—all with convenient delivery options including short course modules and online classes. Adults can also choose from undergraduate degrees offered 100 percent online or in a friendly evening format.

ORU students excel in a variety of academic disciplines, and that's reflected in the awards that they've won in everything from the Oklahoma Intercollegiate Legislature to the Enactus Organization and the Great Plains Honors Council.



The Princeton Review has named ORU one of the “Best in the West” again this year; the school is ranked as one of the Top 100 Social Media Colleges in the nation; and ORU was honored to have recently been named to Victory Media's 2013 list of military friendly schools.

ORU faculty members are leading practitioners in a variety of disciplines and leading thinkers in a wide

range of Christian theological perspectives. They provide individual attention and engage, nurture, and mentor their students—thanks in part to a 15:1 student-faculty ratio.

An array of scholarship opportunities as well as financial aid is made available to ORU students including talent, merit and leadership awards as well as need-based assistance. The university also offers the innovative Whole Person Scholarship Program through which undergraduate students can be awarded up to \$20,000 per year.

The university's strong academic emphasis is enriched by community outreach, missions, and a host of different co-curricular clubs and organizations. Students also enjoy supporting their NCAA Division I Golden Eagle athletic teams. A brand new state-of-the-art Student Center is scheduled to open in February 2013. Here students can hang out, eat and study in a relaxed environment. They will have access to video game systems, multiple dining options as well as the largest television in Oklahoma. For more information, visit oru.edu.

The University of Tulsa

The Henry Kendall College of Arts and Sciences at The University of Tulsa (TU) is the foundation for all of TU's liberal arts programs, where students receive an outstanding education in the sciences, humanities, and the arts. The college's dedication to scholarship excellence, combined with a deep commitment to the community, allows students to succeed far beyond the classroom.

TU's contribution to the City of Tulsa's arts and humanities scene is a strong partnership that continues to grow. The university opened the Roxana Rozsa and Robert Eugene Lorton Performance Center on campus in 2011, and then launched the Henry Zarrow Center for Art and Education in Tulsa's historic Brady Arts District in 2012. The three-story Zarrow Center is a multipurpose facility serving the TU School of Art, Division of Lifelong Learning, and the TU-managed Gilcrease Museum. The downtown center features 18,000 square feet of classroom, studio, gallery, and reception space that contributes to the Brady District's revitalization process.

In addition to the Zarrow Center, TU is constructing the Helmerich Center for American Research at Gilcrease Museum to further preserve and promote the art, history, and culture of the Americas.

The 25,000-square-foot center will house the Gilcrease Library and Archive and host visiting faculty and students from around the world to conduct research.

Along with all TU students, graduates from the College of Arts and Sciences benefit from the university's reputation as one of the top doctoral universities in the country. *U.S. News & World Report's* 2013 edition of Best Colleges lists TU in the top 100 national universities for the

10th consecutive year. TU is the only Oklahoma university in the top 100 and is among the nation's top 50 private universities. TU's commitment to excellence attracts some of the nation's top scholars to Tulsa to not only teach and mentor the brightest students, but also to help graduates achieve employment. A recent survey showed 92 percent of Henry Kendall College students were employed within three months of graduation.

For more information, visit utulsa.edu.



Tulsa Tech

Tulsa Tech is the state's oldest and largest career and technology education institution in Oklahoma's highly acclaimed CareerTech system. Tulsa Tech provides quality technical training to thousands of high school and adult students, as well as business and industry clients annually at multiple campuses and several satellite training locations. Tulsa Tech offers full-time programs for high school students from 14 public school districts throughout Tulsa County, as well as for private, parochial, home-schooled, charter, and adult students. Course offerings are an extension of the high school curricula and also provide career opportunities for adults. Classes for high school students meet for three hours in the morning or three hours in the afternoon. Programs specific to adults may have additional hour requirements. Ranging from health occupation programs to aviation maintenance, information technology to construction trades, courses offer hands-on activities in modern lab, shop, or clinical settings. High school students pay no tuition, and transportation is provided. Hundreds of evening and weekend and continuing education courses help adults retrain for new careers, upgrade current job skills, and keep current on certifications and licensures.

Major accomplishments over the past year include:

Master Planning: Tulsa Tech continues an extensive master development planning and construction process that includes completion of an expansion for Automotive/Robotics/Manufacturing at the Broken Arrow Campus; a new campus complex in Owasso; and a new campus in Sand Springs, both scheduled to open in 2013.

Enrollment: Enrollment in full-time career majors remains strong at Tulsa Tech with nearly 4,000 adult and high school students. More than 30,000 adults take advantage of evening and online courses that are designed to help adults upgrade job skills or retrain for a new career in a short amount of time.

Credit by Colleges: Tulsa Tech maintains strong partnerships with higher education institutions and students who meet the eligibility requirements can earn college credit toward an Associate of Applied Science (AAS) or college-level certificate of mastery while they are still in high school or as an adult. College credit is available through Tulsa Community College, Rogers State University, or OSU-IT.

Teacher Training: Tulsa Tech provides classroom technology training through The Eighth Floor Professional Development Center for Educators, a unique collaborative center administered by Tulsa Tech and Tulsa Community

College. Tulsa Tech has more Nationally Board Certified teachers than any other Oklahoma CareerTech school.

Academic Credit: Tulsa Tech offers high school students the opportunity to earn math and science credits including Advanced Placement Courses for many programs taken at Tulsa Tech, which fulfills their high school graduation requirements.

Business and Industry Training: Tulsa Tech provides support and customized training services to more than 200 Tulsa-area businesses through the Business and Industry Services (BIS) Department as well as small business management and self employment preparedness classes.

Student Leadership Opportunities: Tulsa Tech has celebrated many national winners, with several capturing first-place gold medals, as well as hundreds of local and state winners in career and technology student organizations' (CTSOs) skill and leadership competitions. The five student organizations include Marketing Education (DECA/DEX), Skills USA (Career and Technical Education), Family, Career & Community Leaders of America (FCCLA), Health Occupations Students of America (HOSA), and the Business Professionals of America (BPA). These organizations provide leadership opportunities, skill training, social activities, and a chance to showcase and validate the skills learned at Tulsa Tech. For more information, visit tulsatech.edu.



transportation

Transportation infrastructure in Tulsa has received a significant boost with the American Recovery and Reinvestment Act of 2009. Significantly, reconstruction of the I-244 bridge across the Arkansas River deservedly received an increase in federal funding. Other improvements were the north and the west parts of the Inner Dispersal Loop around downtown Tulsa.

Regional Transit System Planning efforts concluded with the recommendation of various corridors to connect Tulsa with the surrounding cities and by addressing commuter travel within the metropolitan area. The Oklahoma Department of Transportation also has selected a consultant to study possible rail implementation between Oklahoma City and Tulsa.

The City of Tulsa's comprehensive planning efforts ignited initiatives related to livable, context-sensitive design options surrounding public infrastructure that can be sustained with available funding. It also gave a boost to these initiatives in no small measure along with the national priorities that are set by the administration toward energy independence, coupled with the stimulus package efforts. INCOG (Indian Nations Council of Governments) has been

studying these efforts for some time as public interest seems to be at its peak for making a change in transportation investments and finding real alternatives to personal transportation to keep up with mobility needs.

Following the process of federal selection for major investment decisions, INCOG has strategically applied to utilize federal money with a local match to undertake a significant comprehensive study of public transportation needs in the region. A consultant is studying options to bring high-capacity modes of transit to Peoria Avenue. The Peoria Transit Study, Alternative Analysis, is currently underway.

The regional transportation investments scenario has improved with the stimulus money and projects undertaken by the state. A federally funded Tiger grant was awarded to the Port of Catoosa to modernize the crane equipment. In addition, the federal stimulus is helping Tulsa Transit convert a majority of its fleet to compressed natural gas-powered (CNG) vehicles. Tulsa International Airport is also expected to get a boost from stimulus funding, and INCOG is continuing to promote a user-friendly website

called green-traveler.org as an alternative means of carpooling. It is a free website, providing matches to people living in close proximity and traveling to similar or the same destinations around the region. In addition, INCOG is also working on a Transportation Resource Center to provide information related to all available transportation options as a one-stop location on the web.

Apart from those separate initiatives, work continued on the development of a new Regional Transportation Plan (RTP) for the target year 2035. The new plan will feature all modes of transportation including public transportation, bicycle and pedestrian facilities as well as future roadway infrastructure based on needs.

To meet the demand of a growing community, the I-44 expansion project has moved further along in its reconstruction. The Jerry Lasker Interchange at I-44 and Harvard Avenue has been reopened with six lanes. I-44 and Peoria as well as I-44 and Riverside Drive intersections are now complete. Also, with funding secured, I-44 and Lewis Avenue is now in the construction phase.

Gilcrease Expressway between the L.L. Tisdale Expressway and U.S. Highway 75 to Keystone Expressway is also on schedule for construction, but the major link, a bridge over the river, is currently lacking secured funding.

The 2032 plan (adapted in December 2010), improvises on the choices for roadway expansion and maintenance. The 2032 plan also incorporates the vision for International Technology System (ITS) and incident management in the Tulsa metropolitan area in order to alleviate congestion. The plan calls for the detailed study of several high-traffic and high-growth corridors and the implementation of commuter-choice options such as bus transit or a rail system utilizing existing rights-of-way.

TULSA METROPOLITAN STATISTICAL AREA TRANSPORTATION INDUSTRY EMPLOYMENT¹

INDUSTRY	AVERAGE EMPLOYED IN 2011
Transportation Industry	22,169
Air Transportation	6,608
Trucking	4,435
Transportation Equipment Manufacturing	5,552
Transportation Support Activities	2,286
Warehousing and Storage	736
Postal Transportation, Couriers and Messengers	1,225
Transit and Ground Passenger Transportation	334
Pipeline Transportation	993

¹ Does not include water, rail, or scenic tour transportation.
Source: U.S. Census Bureau, October 2012.



The Tulsa Transportation Management Area (TTMA) Trails Master Plan first developed in 1999 identified 44 corridors for trail development throughout the metro area, comprised of 283 miles of off-road multiuse trails and 207 miles of on-road linkages. This plan has been used by communities throughout the metropolitan area as a tool for trail location and design. Many of the corridors identified in the 2032 plan have been constructed or are in the planning stages. The City of Tulsa recently added a new section to the West Bank Trail from the PSO Soccer Complex to I-44. In addition, the City of Tulsa has proposed improvements to Route 66 in West Tulsa as a part of a street beautification program.

The cities of Sand Springs, Jenks, Broken Arrow, and Claremore currently have trail projects under development. Funded trails include the West Bank II, Cherry Creek, and the Osage Trail from Pine Street to 56th Street North. Broken Arrow was granted funding and completed work on an extension of the BA South Loop Trail from 145th East Avenue to 101st Street near the Northeastern State University campus. Additionally, two new trails will be constructed in Tulsa County and the City of Tulsa as a result of the Vision 2025 funding packet, which provided funding for the Midland Valley Extension from Maple Park to 3rd Street downtown and the Osage Trail from 56th Street North to State Highway 20 in Skiatook.

One major objective of the plan is to encourage suburban communities to connect with community facilities via the new and improved trails system. Once connections are established, citizens will have an alternative transportation option to travel between communities and the City of Tulsa by bicycle or on foot.

The Tulsa Port of Catoosa, located five miles from the City of Tulsa, opened in 1971 and has supplied services to more than 30,000 barges transporting 48 million tons of cargo. Four hundred and

BARGE TONNAGE

YEAR	BARGE TONS
1995	1,581,424
1996	1,961,197
1997	2,160,948
1998	2,417,537
1999	2,242,850
2000	2,210,061
2001	2,046,692
2002	2,223,103
2003	2,250,139
2004	2,220,871
2005	1,819,905
2006	2,321,448
2007	2,010,505
2008	2,050,394
2009	2,058,191
2010	2,266,893
2011	2,160,624
2012 ¹	1,848,752

¹ 2012 is year-to-date total through August.
Source: Tulsa Port of Catoosa.

forty-five miles of waterway link Oklahoma to national and international ports and is easily accessible by the interstate highway system. The Port industrial complex covers 2,000 acres and is home to more than 50 companies employing nearly 3,000 people. More than two million tons of cargo is shipped through the Port annually on 1,300 barges. The Port of Catoosa is responsible for returning \$2.6 billion in annual benefits to the regional economy. The previously mentioned new federally funded Tiger project to improve the crane facility will add to the infrastructure.

Tulsa International Airport, established in 1928 and located just 10 minutes northeast

AIR TRANSPORTATION

YEAR	TOTAL PASSENGERS	AIR FREIGHT
1995	3,143,042	41,360
1996	3,387,803	48,118
1997	3,414,301	49,673
1998	3,463,214	48,905
1999	3,419,975	51,418
2000	3,498,722	52,458
2001	3,243,965	48,294
2002	2,907,308	48,188
2003	2,747,203	51,059
2004	2,943,919	54,825
2005	3,132,962	53,578
2006	3,168,716	56,784
2007	3,218,429	60,103
2008	3,180,765	59,334
2009	2,812,295	58,975
2010	2,763,562	54,675
2011	2,707,386	55,743
2012 ¹	1,781,214	37,647

Air Freight in tons.

¹ 2012 is year-to-date total through August.
Source: Tulsa Airport Authority.

of downtown Tulsa, also plays an important role in the economic vitality of the region, with an impact of more than \$3 billion annually. The airport employs more than 15,000 people and provides not only commercial benefits (moving more than 31,000 tons of cargo each year), but also services business and leisure travelers.

Improvements continue at the airport. The security area and the outside passenger arrival section improvements have been completed, and a phased-noise mitigation program is under way, as well as taxiway improvements and runway extensions. ◆

housing

For those looking to invest in a new home, now is the time to buy. For the first time since 2005, metro Tulsa's housing industry grew in 2012, with an increase of approximately 30 percent in new home starts, according to data released by the Home Builders Association of Greater Tulsa. Residential construction permits topped the 2,000 mark, approaching 2010 levels, and signifying what most industry experts anticipate will be the start of a full housing recovery. While new homes are being built in many parts of the Tulsa MSA, activity is now primarily centered in the cities of Bixby, Broken Arrow, Jenks, Owasso, and Tulsa all of which are in Tulsa County.

Throughout the market downturn, Tulsa has remained a bright spot in the industry, with affordable home prices, appreciating home values,

and limited distressed properties, as well as a balanced supply of new homes on the market.

Home values in Tulsa continue to remain strong and appreciate. According to the National Association of Realtors, as of the second quarter of 2012, home values were up 4.4 percent over the prior four quarters, and up 2.5 percent over the past three years.

And, while values are up, homes in Tulsa also continue to be some of the most affordable in the country. The National Association of Realtors' Housing Affordability Index reached its highest level this year since its inception in 1970. This index measures the affordability of a median-priced, existing single-family home for a median-income-earning family. In Tulsa, the index increased by more than 8 percent from 2010 to 2011, and has continued this trend in 2012.



Throughout the market downturn, Tulsa has remained a bright spot in the industry.



The health of the Tulsa housing market is due to a well-diversified economy

COMPARISON OF MEDIAN HOUSING PRICES

METRO AREA	AMOUNT
Memphis, TN	123,500
Tulsa, OK	136,500
Dallas, TX	163,000
Orlando, FL	136,100
Phoenix, AZ	148,400
Kansas City, MO-KS	148,400
Houston, TX	168,300
Minneapolis-St. Paul, MN	174,500
Albuquerque, NM	174,300
Sacramento, CA	170,200
Austin-Round Rock, TX	214,900
Charlotte, NC	212,300
Chicago, IL	187,700
Denver, CO	260,700
Seattle, WA	290,700

Amount in dollars.
Median sales price for existing single-family homes.
Sources: National Association of Realtors, Second Quarter 2012, Preliminary.

TULSA METRO HOME SALES

YEAR	HOMES SOLD	MEDIAN SALES PRICE ¹
1998	9,704	85,000
1999	9,777	90,500
2000	9,728	105,000
2001	10,852	107,500
2002	10,756	113,500
2003	11,698	111,000
2004	11,625	115,000
2005	13,200	119,900
2006	13,741	120,200
2007	11,945	119,000
2008	10,539	108,000
2009	11,208	126,500
2010	9,464	128,950
2011	10,133	124,150
2012 ²	7,966	129,000

¹ Includes single-family and condo sales.
December year-to-date median sales price.

² August year-to-date.
Source: Greater Tulsa Association of Realtors.

These key indicators, along with Tulsa's low unemployment rate, have resulted in the city's consistent listing on the National Association of Home Builders Improving Market Index. This register includes markets that have realized sustained growth for at least six consecutive months in terms of building permits, housing price appreciation and employment figures. Tulsa is the only city in Oklahoma to be included on the Index every month in 2012.

The health of the Tulsa housing market is due to a well-diversified economy based on aviation, machinery and electrical equipment manufacturing, energy and energy services, and its position as a large regional health care employer. Tulsa also benefits from the University of Tulsa, Oral Roberts University, and the Tulsa Port of Catoosa, which is the most inland river port in the U.S. with access to international waterways.

Comparing 2010 American Community Survey data for Tulsa to the U.S. offers strong evidence that Tulsa is doing well and gives some insight into why. The unemployment rate is almost 22 percent lower in Tulsa than in the rest of the country, while the labor-force participation rate is slightly higher and the average age of the population slightly lower. In addition, the percentages of persons employed in natural resources, construction, and maintenance occupations is about 20 percent higher than the national average as is the number employed in manufacturing. Because the local economy is doing well, the number of vacant housing units, either owner-occupied or rental, is 14 percent lower than the nation as a whole and the percentage of owner-occupied units stands at 67.1 percent versus 65.4 percent for the nation.

The economy and the real estate market in Tulsa are doing well. Many have considered the area to be one of America's best-kept secrets and feel very fortunate to live in Tulsa.

Over the next 10-20 years, a record number of prospective homebuyers will be entering the market. This is the exclamation point on the positive long-term outlook for the housing industry. With a variety of major incentives available to buyers, including historically low interest rates and numerous special programs including grants and tax credits, it is a great time to consider buying a new home or investing in an existing one. ♦



Triplets, Sam, Ella and Ben are enjoying spring in Tulsa.

Metro Tulsa's housing industry grew in 2012, with an increase of approximately 30 percent in new home starts.

utilities

Adequate, reliable sources of electricity, natural gas, water, and communications are essential to a community's quality of life and to its economic prosperity. Tulsa's utility needs are met by a variety of dedicated, forward-looking suppliers attuned to the future.

Electricity is provided by Tulsa-based Public Service Company of Oklahoma (PSO), which has served Tulsa since 1913, in addition to 232 other towns and cities in eastern and southwestern Oklahoma. PSO has 4,308 megawatts of generating capacity to supply its 532,000 customers statewide, including approximately 285,000 in the Tulsa area. PSO also has 690 megawatts of wind energy under long-term contracts, making it Oklahoma's leader in promoting use of clean wind power and supporting the state's wind industry. PSO is an operating company of American Electric Power (AEP), which is based in Columbus, OH. AEP is one of the largest electric utilities in the U.S., delivering electricity to more than five million customers in 11 states. AEP ranks among the nation's largest generators of electricity, owning nearly 38,000 megawatts of generating capacity in the U.S. AEP also owns the nation's largest electricity transmission system, a nearly 39,000-mile network that includes more 765-kilovolt extra-high voltage transmission lines than all other U.S. transmission systems combined.

2012 TULSA UTILITY COSTS / Typical Monthly Bill

NATURAL GAS SERVICE

DTH/MMBTU PER MONTH	50 ¹	100 ²	500 ²	1,000 ²	5,000 ²	10,000 ²
Monthly Costs	377	444	1,785	3,511	16,056	31,562

ELECTRICITY Commercial Service

KILOWATT (KW: BILLING DEMAND)	3	6	12	30	50	100	500
Kilowatt Hours (KWH: CONSUMPTION)	375	750	1,500	6,000	12,500	30,000	150,000
Cost	59	82	127	419	960	2,200	10,758

ELECTRICITY Industrial Service

KILOWATT (KW: BILLING DEMAND)	150	300	500	1,000	5,000	10,000
Megawatt Hours (MWH: CONSUMPTION)	30	60	125	350	1,800	3,500
Cost	2,252	4,445	9,063	16,338	81,879	160,804

WATER AND SEWER Commercial Service³

	INSIDE CITY	OUTSIDE CITY
Water	\$ 2.48	\$ 3.68
Sewer	\$ 4.71	\$ 7.70

WATER AND SEWER Industrial Service³

	INSIDE CITY	OUTSIDE CITY
Water	\$ 1.81	\$ 2.66
Sewer	\$ 4.71	\$ 7.70

Cost in dollars.

Dth represents a unit of heat equal to one million British thermal units (Btu) dry.

- Does not qualify for transport and was based on Oklahoma Natural Gas Company's twelve-month average commodity price of \$5.89 per Dth plus monthly service fees.
- Qualifies for transport and third party gas. Costs were based on ONEOK Gas Transmission's twelve-month commodity price of \$3.96/Dth plus monthly transport fees as well as a usage profile representing a load factor of 78%.
Large customers should contact Oklahoma Natural Gas Economic Development office for specific costs. Costs for 100 Dth/month or higher apply to transport customers who purchase gas from a third party supplier and ONG transports it for them.
- Water and sewer rates are based on cost per thousand gallons. Rates do not include monthly meter charges, which depend on the size of the meter.

Sources: AEP-Public Service Company of Oklahoma, Oklahoma Natural Gas Company, and City of Tulsa Water and Sewer Department, 2012.

Report prepared by Research Wizard, Tulsa City-County Library.



Veolia Energy Tulsa, Inc.

Tulsa is a city of unique character. Long known as one of America's most livable cities, Tulsa has maintained the integrity of its downtown area while modernizing historic structures that date back to the city's early days as the "Oil Capital of the World." However, unlike most cities of its size, Tulsa enjoys the additional advantage of the presence of a central heating and cooling (District Energy) facility through which downtown buildings may outsource their thermal energy needs. In Tulsa's central business district, Veolia Energy Tulsa, Inc., utilizes its underground piping network to provide heating and cooling to 7.1 million square feet of space in approximately 30 buildings.

Veolia Energy is a leading operator and developer of energy efficient solutions. They devise and deliver

foot, One Place Tower. Veolia Energy's customers all experience the benefits of competitive energy costs, reduced capital expenditures, and reduced operations and maintenance costs. The company's Tulsa staff of 16 locally-based professionals is adept at operating and maintaining the state-of-the-art District Energy technology that results in reduced fuel usage and carbon footprints, more than the conventional generation of steam and chilled water from in-house boilers.

Veolia Energy Tulsa has a history of maintaining long-term customer relationships, with many customers in the city having received service continuously for 30 years. Around-the-clock service is available whenever it is needed, 365 days a year, and the system's history of 99.9 percent reliability

Natural gas service is provided by Oklahoma Natural Gas Company (ONG), which has served Tulsa since 1906. ONG serves approximately 829,000 customers in Oklahoma, including the Tulsa area. ONG has 18,100 miles of distribution mains and service lines statewide. The company has affiliates that operate transmission and gathering operations in Oklahoma that include more than 2,500 miles of pipeline and five strategically located underground storage facilities in Oklahoma. ONG is a division of Tulsa-headquartered ONEOK, Inc. ONEOK is a diversified energy company and among the largest natural gas distributors in the U.S., serving more than two million customers in Oklahoma, Kansas, and Texas. The company's energy services operation focuses primarily on marketing natural gas and related services throughout the U.S.

The City of Tulsa supplies drinking water to more than 133,500 metered accounts in the city and more than 500,000 people in the metropolitan area. Treatment plants, distribution lines, and other infrastructure have been built and upgraded over the years to keep pace with Tulsa's growing need for high-quality drinking water. Tulsa's water delivery system is ready to handle future needs. The City of Tulsa can transport, treat, and deliver about 220 million gallons per day. The current average daily use is slightly less than half of that amount.

Tulsa is also an important communications hub with many miles of optical fiber networks linking local users with national and international networks. Installed fiber networks provide Tulsa with growth capacity for years to come. Local companies provide communications for television broadcasts of sporting and entertainment events around the world, as a result of the enormous broadband capacity available here. ♦



custom solutions that are designed to help clients control costs, decrease consumption of energy and fossil fuels, mitigate operating risks, extend the useful life of energy infrastructure, and reduce carbon footprint. To achieve these benefits for their customers, Veolia Energy specializes in district energy, combined heat and power, energy plant O&M, renewable energy, and energy management and advisory services.

In the United States, Veolia Energy owns and operates the largest portfolio of environmentally-responsible District Energy systems, serving nearly 1,300 customers in 14 cities: Atlanta, Baltimore, Boston, Cambridge, Grand Rapids, Kansas City, Las Vegas, Los Angeles, Oklahoma City, Portland, Philadelphia, St. Louis, Trenton, and Tulsa.

Among Veolia Energy Tulsa's customers are prestigious office buildings, state and county government facilities, private apartment buildings, and arts and cultural centers in the downtown area. Veolia Energy signed and completed the construction for a 20-year agreement to supply thermal energy to the fifteen-story, 320,000-square

ensures that customer needs are met. Veolia Energy's highly efficient system consists of electric and gas-turbine chillers with a production capacity of 24,000 tons of chilled water and 291 mlbs./hr. of steam, along with the cogeneration of electricity for internal use.

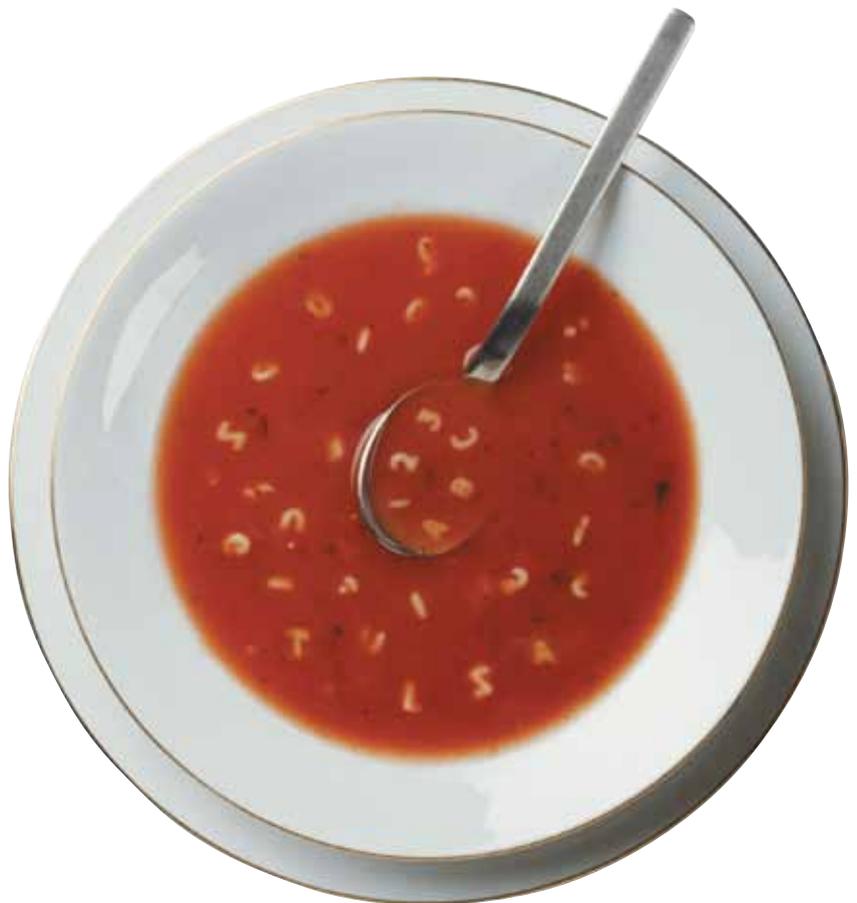
Veolia Energy looks forward to their continued contributions to the sustainable development, growth, and prosperity of Tulsa through partnerships with city officials and business leaders to provide quality, integrity, convenience, and reliability in its services. To find out more about Veolia Energy's energy efficient solutions, visit their website at veoliaenergyna.com.

health care

The Tulsa County Medical Society (TCMS) and the Tulsa County Medical Society Foundation represent more than 1,000 area physicians who are excited about the role they play in serving this great community. For the past 105 years, the Tulsa County Medical Society has worked to advance health care for physicians who practice medicine and for the patients to which they provide care. Its journey has taken many turns as it has continued to address issues relevant to Tulsans and important to public health.

For the past 70 years physicians of Tulsa County Medical Society have made summer camp a reality for hundreds of Tulsa children. Every year TCMS physicians go to the Salvation Army to provide physicals for children whose family can't afford a visit to the doctor's office. The physicians also counsel with the children about healthy diets and exercise and encourage them to work hard in school.

TCMS feels a responsibility to promote the practice of medicine and continues to pave the way for physicians of the future. To that end, since 1964, 1,220 medical students have received scholarships totaling \$1,097,250. The awards recognize medical students based on the work



TULSA HOSPITALS

FACILITY	OPERATING BEDS	BASSINETS	BIRTHS	INPATIENT ADMISSIONS	OUTPATIENT VISITS	EMERGENCY VISITS
OSU Medical Center	249	15	479	6,519	28,111	46,590
Hillcrest Medical Center ¹	727	48	3,266	24,117	79,251	48,399
St. John Medical Center	547	20	2,000	28,500	421,000	57,300
Saint Francis Hospital	646	34	4,309	35,595	267,768	91,191
Laureate Psychiatric Clinic and Hospital	91	NA	NA	2,225	11,323	NA
Cancer Treatment Centers of America	43	NA	NA	933	27,290	NA
Hillcrest Hospital South	180	26	1,645	7,694	43,927	27,916
The Children's Hospital at Saint Francis	162	NA	NA	7,998	NA	NA
Saint Francis Hospital South	72	11	1,012	3,246	21,253	22,585

¹ Includes Peggy V. Helmerich Women's Health Center.

they have done specific to volunteerism and leadership. The Scholarship Program of the Tulsa County Medical Society Foundation is one way in which it gives back to the profession, while also encouraging medical students to stay and practice in Oklahoma.

It was the vision of TCMS member George Prothro, M.D. to see unused, unexpired packaged medications that were being discarded by long-term care facilities re-dispensed to indigent patients in Tulsa County. In 2004 a bill was passed to allow for the transfer of medications. To date 110,387 prescriptions have been filled for indigent residents totaling more than \$10 million in wholesale value. Retired TCMS physician members transport the medications from long-term care facilities to the pharmacy, which was renamed in July 2012 as The George Prothro, M.D. Pharmacy of Tulsa County.

In 2011, the Tulsa County Medical Society Foundation initiated Project TCMS to coordinate specialty care referrals for uninsured indigent residents in Tulsa County. To date more than 60 physicians have volunteered to accept referrals

from Project TCMS and five hospitals have also pledged support. Seventy-eight patients have been referred through the program, and donated dollars of care and services total \$79,000.

MyHealth Access Network is a non-profit coalition of more than 200 health care organizations in Oklahoma, with a goal to improve health care quality and the health of Oklahomans while controlling costs. MyHealth is a 'wires only' organization and does not provide direct care to patients. MyHealth Access Network seeks to link providers and their patients in a community-wide health information system that will:

Improve patients' experience and ability to take control of their own health.

Improve quality care for Oklahoma.

Reduce health care costs associated with redundant testing, hospital admissions, and emergency department visits.

Improve care coordination during transitions between health care settings.

Bring community leaders and organizations together to use health information.

The backbone of the MyHealth Access Network is to provide physicians and patients the most effective, cutting-edge technology available in health care information.

Founded by William K. and Natalie Warren in 1960, Saint Francis Health System is a not-for-profit, Catholic organization that consistently provides excellence in health care, delivered by highly skilled medical professionals. Since its inception, Saint Francis Health System has expanded to include Saint Francis Hospital, The Children's Hospital at Saint Francis, Warren Clinic, the Heart Hospital at Saint Francis, Saint Francis Hospital South, Laureate Psychiatric Clinic and Hospital, and Saint Francis Broken Arrow. Guided by the mission "to extend the presence and healing ministry of Christ in all we do," Saint Francis Health System's physicians, employees and volunteers are committed to the values of excellence, dignity, justice, integrity, and stewardship.

CONTINUED ON PAGE 45



Saint Francis Health System

With a solid tradition of over 50 years in the Tulsa community, Saint Francis Health System is a private, not-for-profit, Catholic healthcare organization founded by Natalie and William K. Warren, Sr. Throughout its history, Saint Francis Health System's mission of extending the healing ministry of Christ has been a guiding principle. Yesterday and today, Saint Francis staff, physicians and volunteers remain committed to pursuing excellence, dignity, justice, integrity and stewardship in their deeds and actions.

Saint Francis Hospital is an acute care hospital currently licensed for 968 beds. Consistently

providing area families with outstanding medical care and sophisticated services, Saint Francis Hospital is the only hospital in Oklahoma ranked for two consecutive years in the top five percent for clinical excellence by HealthGrades, the nation's most respected healthcare rating agency. Saint Francis Hospital also received National Research Corporation's Consumer Choice Award for the 17th consecutive year for overall quality.

Construction is underway on the Saint Francis Hospital Trauma Emergency Center and Bed Tower, with completion scheduled for the summer of 2014. The new eight-story, 500,000 square-foot

facility is the largest and most significant addition to the Saint Francis Hospital campus since it was dedicated in 1960. Key features of the addition and renovation project will include increased acute and critical care capacity with a 150-bed patient care tower; a new 85-bed Trauma Emergency Center; a spacious new main lobby that will connect all wings of the hospital; a new chapel and convent; clinical education rooms; as well as administrative and physician office space.

Since first opening its doors in early 2008, The Children's Hospital at Saint Francis continues to champion the health and well-being of children. The 162-bed, 265,765-square-foot Children's Hospital is recognized throughout the area for its advanced medical technology and extensive team of skilled pediatric specialists. The Children's Hospital's 58-bed Henry Zarrow Neonatal Intensive Care Unit (NICU) opened in fall 2009 and provides the most advanced treatments and services for premature infants and critically ill newborns in the region.

Saint Francis Hospital South sustains its initial goal of providing families with quality healthcare in a more accessible location. The 96-bed hospital provides residents of Broken Arrow, Bixby, Jenks, South Tulsa, Wagoner and Coweta with a number of specialized services and programs including an emergency center, general surgery, radiology and



Architectural renderings of the new Saint Francis Hospital Trauma Emergency Center and patient tower.

imaging, cardiology, labor and delivery, orthopedics and primary care.

Rated in 2011 as one of the country's top 50 cardiovascular hospitals, the Heart Hospital at Saint Francis provides comprehensive cardiac services which are available in one easily-accessible location. The five-floor facility located on the Saint Francis Hospital campus, provides its patients with a welcoming environment, as well as the latest in medical technology, diagnostic testing,

interventional cardiology, electrophysiology, cardiac rehabilitation and disease prevention services.

Warren Clinic, Saint Francis Health System's extensive network of more than 300 primary care physicians and specialists, provides easy access for patients. Physician offices are located throughout Tulsa and surrounding communities such as Broken Arrow, Coweta, Jenks, Owasso, Sand Springs, Bixby, Catoosa, Stillwater, Vinita, and McAlester. During the past several years, Warren Clinic has further extended its range of care by adding more

healthcare providers to its extensive and varied team of specialists. It is the largest privately owned physician group in Oklahoma.

Laureate Psychiatric Clinic and Hospital is a behavioral healthcare facility that is licensed for 75 inpatient beds. Clinical programs include comprehensive outpatient behavioral health services, adult inpatient and outpatient care, senior behavioral health and an internationally known eating disorders treatment program. With more than 70,000 outpatient visits per year, Laureate is one of largest behavioral health clinics in the region.

For more information on any of the services provided at Saint Francis Health System, or to find a physician to meet your healthcare needs, visit sainfrancis.com or please call 918.494.2200.

Laureate Psychiatric Clinic and Hospital.



Saint Francis Hospital South is located east of Highway 169 on 91st Street.



Warren Clinic Tower.



Located at 61st and Yale Avenue, Saint Francis' main campus includes The Children's Hospital at Saint Francis and the Heart Hospital at Saint Francis.

Oklahoma Heart Institute

Oklahoma Heart Institute—The Hospital.

LIVING PROOF

With heart disease ranked as Oklahoma's #1 killer, an aging baby boomer population, and obesity on the rise, overwhelming demand for Oklahoma Heart Institute's cardiology services has resulted in significant expansion. New physicians, facilities, and procedures have made Oklahoma Heart Institute (OHI) and Clinics, now 24 years old, the region's largest and most advanced cardiovascular practice.

From prevention and diagnosis to treatment and rehab, a team of 35 specialists in interventional and noninvasive cardiology, electrophysiology, heart failure, and endocrinology sees patients in two physicians' offices in Tulsa. With a commitment to the most advanced technology, they treat complex hospital cases at their flagship heart hospital, Oklahoma Heart Institute, on the campus of Hillcrest Medical Center. They provide the same great hospital care at Hillcrest Hospital South, Hillcrest Hospital Claremore, and Bailey Medical Center, where, if more advanced technology is required, patients are easily transported to OHI in Tulsa.

OHI physicians also take award-winning care beyond Tulsa to regional clinics at Bristow, Claremore, Cleveland, Cushing, Fairfax, Henryetta, Miami, Owasso, Pryor, Tahlequah, Vinita, and Wagoner.

In 2012 at the OHI hospital, high demand necessitated doubling the size of the CV ICU unit. Also at the OHI hospital, a new hybrid lab opened. By combining a state-of-the-art cath lab with a complete cardiac surgery operating room, the hybrid lab allows for the treatment of complex and high risk conditions involving the heart and blood vessels that otherwise would not be done.

At the OHI SouthPointe physicians' office building, a new cath lab was opened to expand diagnostic cardiac catheters into a convenient, user-friendly, outpatient setting in South Tulsa.

By marrying new facilities with new procedures, OHI's sub-specialized physicians provide patients with complex treatments normally performed only at major universities, and with very successful results.

A revolutionary, new procedure recently was introduced by OHI's invasive team. Transcatheter



aortic valve replacement (TAVR) is performed in the new hybrid cath lab on patients who are too sick to have surgery. With only a small incision, valves are replaced and patients can go home within a few days. Oklahoma Heart has one of the top valve programs in the region, providing excellent outcomes for these high-risk surgery patients.

Another minimally invasive procedure, carotid stenting, is performed by OHI's invasive cardiologists to treat high operative risk patients with blockages of the carotid arteries that supply blood flow to the brain. In addition, many patients elect carotid stenting instead of surgery since there is no scar, and patients often go home the next day.

When surgery is necessary, Oklahoma Heart's surgeons are among the top 50 in the country. In northeastern Oklahoma, the invasive cardiologists at OHI also provide circulatory assist with the Impella systems to perform very high-risk coronary stent procedures in otherwise inoperable patients.

For patients with atrial fibrillation who can't take blood thinners, making them at risk for stroke, the Lariat procedure is now available at Oklahoma Heart, where physicians were the first in the state to perform this cutting-edge procedure.

Also for atrial fibrillation patients who don't want to take lifelong medications, cryoablation is only

available in Northeastern Oklahoma at OHI. For younger people with atrial fibrillation, the innovative use of a coolant for cryoablation is safer and has high success rates. The only cardiology program in the region to use exclusively board certified electrophysiologists to implant ICDs (implantable cardiac defibrillators) is OHI. They also are experts in lead extraction and ventricular tachycardia/PVC ablation/isolation.

Oklahoma Heart Institute is known for its state-of-the-art care, including aquapheresis for diuretic resistant heart failure patients, high success rates for bypass surgery, lifesaving screenings, nationally certified nuclear, echo and CT facilities, and an internationally recognized cardiac MRI program. Continued cardiology and endocrinology expertise provides patients with the latest in preventive care.

Clinical research also remains at the forefront, which allows OHI to provide the latest technology and care to its patients, often five to ten years in advance of it becoming generally available.

All of these things continue to distinguish Oklahoma Heart Institute as the premier provider of cardiology care in Northeastern Oklahoma with the best outcomes in the state. And, as always, their patients are living proof.



Oklahoma Heart Institute—Utica Physicians Office.



Oklahoma Heart Institute—SouthPointe Physicians Office.

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In 1918, Hillcrest first opened its doors to provide hope, health, and healing to our community in a small hospital situated in the heart of the city. Today, nearly 95 years later, Hillcrest HealthCare System (HHS) has grown to become a recognized leader in innovative, high-quality healthcare on both the local and national level.

HHS is comprised of six hospitals including Hillcrest Medical Center and Hillcrest Hospital South (formerly SouthCrest Hospital) in Tulsa, as well as four regional hospitals—Hillcrest Hospital Claremore, Hillcrest Hospital Cushing, Hillcrest Hospital Henryetta and Bailey Medical Center in Owasso. The System also provides comprehensive primary and specialty care services through its two employed physician groups—Utica Park Clinic and Oklahoma Heart Institute.

Since its founding as a public institution in 1972, Oklahoma State University College of Osteopathic Medicine has provided vital health care services for rural and underserved communities in Oklahoma. OSU Center for Health Sciences places a strong emphasis on the quality of education that

students receive and was named the most popular medical school in the nation by *U.S. News & World Report* in 2012.

The OSU Physicians clinics system serves as a clinical teaching system, with community-based clinical facilities where faculty physicians, resident physicians, and osteopathic medical students bring critically needed and essential health care to the community.

In addition to being an academic medical setting where students observe and learn,

the OSU Physicians clinic system offers specialty practices. Clinics also conduct a number of free health services to the community, including diabetes education, childhood immunizations, mammograms, and women's health care. A specialty services clinic assists patients living with AIDS/HIV.

OSU College of Osteopathic Medicine (OSU-COM) accepted 115 new medical students in 2012, the largest class in the history of the institution.

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HEALTH SERVICES MARKET ANALYSIS 2013 REPORT

DESCRIPTION	COMPANIES	EMPLOYEES	SALES ¹
Physicians & Health Practitioners	2,357	14,898	1,310.1
Nursing & Intermediate Care ²	132	4,674	1,662.5
Hospitals & Clinics	91	11,398	1,153.0
Medical & Dental Laboratories	99	904	37.7
Other Health Care Services	660	4,664	197.8

¹ Estimated sales in millions of dollars.

² Facilities & Services.

Geographical Area: Tulsa Regional Statistical Area.

Source: D&B 2012.

Cancer Treatment Centers of America

Cancer Treatment Centers of America® (CTCA) in Tulsa is part of a national network of cancer hospitals with additional locations in Arizona, Georgia, Illinois and Pennsylvania, and an outpatient clinic in Washington. CTCA in Tulsa has more than 750 employees and empowers them to deliver the Mother Standard® of care – the same responsive, compassionate care you would want your own family to receive.

CTCA combines advanced forms of surgery, radiation, chemotherapy, and imaging services with scientifically supported integrative therapies, including nutrition, spiritual support, mind-body medicine, and naturopathic medicine, all under one roof.

Focusing solely on treating cancer, CTCA has distinct programs for the treatment of neurological, gastrointestinal, hematological, lung, and breast cancers, among others. The hospital also offers a robust radiation program, including such treatment options as CyberKnife® VSI, TomoTherapy®, Varian RapidArc®, deep tissue and superficial hyperthermia, intraoperative radiation therapy, brachytherapy and TheraSphere®. CTCA



constantly seeks to implement new technologies and treatments whether in surgery, imaging, medical oncology or integrative medicine to provide a host of innovative treatment options for patients. The center recently opened a Stem Cell Transplant and Cell Therapy Program, designed to provide hematological patients with needed blood and

marrow transplants. CTCA also offers infusion 24 hours a day, seven days a week, and medical oncology services every day, including weekends, to provide treatment at the patient's convenience.

For more information, visit cancercenter.com or call 800.333.CTCA.

Hillcrest HealthCare System

This year, Hillcrest HealthCare System (HHS) is celebrating 95 years of providing hope, health, and healing to our community. What began as a small hospital caring for patients during a national influenza epidemic in 1918 has developed into one of the largest and most renowned health providers in Oklahoma offering a comprehensive network of physicians, services and innovative medicine.

Hillcrest HealthCare System is comprised of six hospitals, including Hillcrest Medical Center and Hillcrest Hospital South in Tulsa, as well as Hillcrest Hospital Claremore, Hillcrest Hospital Cushing, Hillcrest Hospital Henryetta and Bailey Medical Center in Owasso. HHS also offers a comprehensive network of primary and specialty care providers through Utica Park Clinic, one of

the state's largest physician groups, as well as nationally recognized cardiology care through Oklahoma Heart Institute (OHI).

Located in the heart of Tulsa, Hillcrest Medical Center—Tulsa's first hospital—is a 727-bed facility recognized for its extraordinary health outcome quality measures. In addition to offering high-quality diagnostic, emergency and tertiary care services, Hillcrest offers patients boutique-style healthcare through highly specialized service lines.

The Peggy V. Helmerich Women's Health Center at Hillcrest is Tulsa's only hospital dedicated solely to the health needs of women. The Center offers leading-edge healthcare in breast disease, gynecology, obstetrics, high-risk pregnancies, neonatology, and urology. A broad range of outpatient services, including diagnostic testing, procedures, and educational seminars, are located within a single, convenient location.

Hillcrest also boasts a state-of-the-art, specialized orthopedic hospital-within-a-hospital and a unique, all-inclusive rehabilitation center. Oklahoma Spine & Orthopedic Institute offers a full range of orthopedic procedures, many of which are performed using very tiny incisions, meaning recovery time is reduced significantly. Using a team approach to care, Kaiser Rehabilitation Center at Hillcrest's staff





Hillcrest HealthCare System is committed to bringing state-of-the-art healthcare to patients whether they live in a metropolitan or rural setting. The System's four regional hospitals, Bailey Medical Center, Hillcrest Hospital Claremore, Hillcrest Hospital Cushing and Hillcrest Hospital Henryetta, offer patients advanced services and physicians close to home. 24-hour emergency care, women's, orthopedics, cardiology and diagnostic imaging are among some of the services available at these hospitals. If a higher level of care is needed, patients can easily and quickly be transported into one of the system's Tulsa metro hospitals for access to specialized services and physicians.

Utica Park Clinic (UPC), one of eastern Oklahoma's largest and most respected physician groups, offers a network of primary care and specialty physicians to ensure access to quality healthcare for everyone. Nearly 200 providers practice at more than 42

helps patients regain function and independence after a debilitating injury or illness.

Hillcrest's Alexander Burn Center has served a tri-state area for decades by providing progressive wound care, nutrition and pain management therapies for minor to life-threatening burn injuries.

Recognized as a leader in cardiology, Oklahoma Heart Institute consists of cardiologists, endocrinologists and cardiothoracic surgeons with experience treating complex conditions ranging from heart rhythm disorders and heart failure, to heart attack, stroke, and metabolic disorders.

Oklahoma Heart Institute (OHI) Hospital opened on the campus of Hillcrest Medical Center in 2009 as the region's largest and most advanced hospital dedicated exclusively to the prevention, diagnosis and treatment of heart disease. OHI combines the expertise of nationally-recognized physicians with the most advanced technology and personalized patient care. Oklahoma Heart Institute's physician group, which has served the area for more than two decades, consists of two Tulsa clinics and 13 regional outreach clinics providing Oklahomans throughout the area with access to high quality cardiology care close to home.

Located in one of the city's fastest growing areas, Hillcrest Hospital South (formerly known as SouthCrest Hospital) is a modern, full service, 180-bed hospital in South Tulsa committed to offering state-of-the-art healthcare with a focus on quality. Hillcrest South consistently earns top marks in quality scores and was named a Top Performer for Key Quality Measures in 2011 and 2012 from The Joint Commission. The Peggy V.



Helmerich Women's Health Center and Oklahoma Heart Institute have expanded from Hillcrest Medical Center to provide the same level of highly-specialized boutique-style healthcare at Hillcrest South.

Situated just north of Tulsa, Owasso's Bailey Medical Center has earned some of the region's highest patient satisfaction and quality scores. In addition to general medicine, Bailey is a leader in bariatric medicine and is among only a handful of facilities in the state to receive Level 1 Accreditation from the ACS Bariatric Surgery Center Network. Bailey's employees are truly committed to their patients and are proud of the quality service they provide earning the hospital a place on the "Top 100 Places to Work in HealthCare" list in 2011 and 2012 by Becker's Hospital Review. It also ranked on Modern HealthCare's "Top 100 Places to Work" list in 2012.

convenient UPC locations throughout northeast Oklahoma. In addition to ease of access, Utica Park Clinic is consistently one of the highest-ranked medical groups for patient satisfaction scores.

Although Hillcrest's more than 1,200 physician partners, 250 employed physicians and 5,000 employees continue breaking new ground by introducing innovative procedures and developing unique programs not found elsewhere in the area, they never forget that medicine is more than science; it is the people and patients who always come first.

We invite you to experience Hillcrest HealthCare System. To find a primary care physician or specialist within the System, call 918.585.8000. To learn more about Hillcrest HealthCare System, please visit hillcrest.com.

OSU Medical Center



Oklahoma State University Medical Center (OSUMC), located in downtown Tulsa, reflects the heart of what makes our city outstanding. At OSUMC, it is the people, through their loyalty and compassion for their patients that have set the medical center on its path of excellence. Since its beginning in 1944 as Oklahoma Osteopathic Hospital, to its current position as the nation's largest osteopathic academic medical center, OSUMC has remained focused on the philosophy of treating the whole person, not just symptoms.

The mission of OSUMC is to provide high quality health care services, delivered with compassion for patients and their families, respect for employees, physicians and other health care professionals, ensuring OSUMC's viability and growth through sound fiscal and ethical performance. In partnership with Oklahoma State University Center for Health Sciences, OSUMC provides superior training for health care professionals to serve rural and urban Oklahoma.

Since 2008, with generous local, regional, and legislative support, OSUMC has put into action a strategic plan resulting in positive changes for the medical center. Upgrades in technology, top of the line equipment, and a new mobile cardiology diagnostic unit are just some of these advancements. OSUMC also completed many remodeling projects including renovations in various departments and several waiting rooms. The Graduate Medical Education Training Center, which serves more than 150 residents, has been updated. Improvements in patient rooms are in progress and campus parking upgrades will begin in 2013. Future renovation plans include Maternal Child Health as well as significant improvements to the exterior grounds of the OSUMC campus. Specialists, internal medicine and family medicine physicians have been recruited with plans to recruit more.

Committed to the vision of the original hospital founders, OSU Medical Center continues its proud tradition of teaching and training physicians to serve in local and rural communities and providing exceptional health care to every patient, every time.

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Residency and fellowship programs throughout the region affiliated with the college offer a wide variety of primary care and specialty medicine. OSU-COM trains more than 150 residents and fellows in primary care and specialty medicine. It employs approximately 100 full-time faculty and more than 600 adjunct faculty.

The St. John Health System is a fully-integrated health care system that encompasses eight hospitals in northeastern Oklahoma and southern Kansas. Other subsidiaries of the St. John Health System include OMNI Medical Group and Family Medical Care primary care physicians, St. John Physicians, Inc., a multi-specialty group physician practice; six St. John Villas senior living centers, St. John Urgent Care centers, and other outpatient treatment centers. St. John Health System cares for more than 3,500 patients each day.

The OU School of Community Medicine (OUSCM), located in Tulsa, is currently a track of the University of Oklahoma College of Medicine. Established in February 2008 with a \$50 million gift from the George Kaiser Family Foundation, the mission of the OU School of Community Medicine is to improve the health status of Oklahoma communities.

The school is also focused on addressing Oklahoma's physician shortage and growing need for physicians serving vulnerable populations.

Oklahoma Surgical Hospital was founded in 2001 and is a 76-bed hospital specializing in surgical care. OSH provides inpatient and outpatient services for most surgical procedures including orthopedics, neurosurgery, general surgery, colorectal, breast, ENT, gynecology, and urology. The hospital also operates the Institute for Robotic Surgery, a Pain Management Center, Imaging Center, Endoscopy Center, and Physical Therapy Center.

Oklahoma State University Medical Center (OSUMC), located in the center of downtown Tulsa, reflects the heart of what makes our city outstanding. At OSUMC, it is the people, through their loyalty and true compassion for their patients that have set the medical center on its path of excellence. Since its beginning in 1944 as Oklahoma Osteopathic Hospital, to its current position as the nation's largest osteopathic academic medical center, OSUMC has remained focused on the philosophy of treating the whole person, not just symptoms. The medical center has received \$25 million dollars in upgrades, renovation, new technology, and equipment. ◆





Tulsa Hospital Facilities

- OSU Medical Center **1**
- Helmerich Women's Center **2**
- Oklahoma Heart Institute **3, 11**
- Hillcrest Medical Center **4**
- St. John Medical Center **5**
- Saint Francis Health System/ The Children's Hospital at Saint Francis **6**
- Laureate Psychiatric Clinic and Hospital **7**
- Cancer Treatment Centers of America **8**
- Hillcrest Hospital South **9**
- Saint Francis Hospital South **10**

professional and business services

Chicago needed a poet to define its business and services sector. All Tulsa needed was a national magazine.

While Carl Sandburg's hog butcher, toolmaker, and city of big shoulders poetry resonated with a multitude of high school English teachers, one of the country's most popular mass circulation magazines solidified Tulsa's image from sea to shining sea.

It was in the February 5, 1949 edition of *Collier's*, one of the most popular magazines of its day, where tribute was paid to the business that was Tulsa's. "...Tulsa can call itself the 'Oil Capital of the World,'" the magazine reported. "It's an honest boast based on plain fact."

Indeed, as *Collier's* and others noted, every oil company worth a drill bit had a significant presence in Tulsa.

The genesis of that well-founded designation was four miles west of Tulsa in an area known as Red Fork. There, on June 24, 1901, oil was struck by a well drilled by two doctors, Fred S. Clinton and J.C.W. Bland. The Sue Bland #1 was a small producer, but big enough to bring more wildcatters willing to punch holes in the ground to this former cow town.

That small gusher could not have come at a better time for a spot on the railroad looking for an identity other than a shipping point for cattle. For it was little more than five years earlier that the hazards of doing business in Tulsa were highlighted by a weekly newspaper of the day:

"Conditions had become intolerable here and something had to be done. When the United States commission, especially a high-class jurist like Judge Elijah Tollett, is forced to leave Tulsa because of fear for his life at the hands of a band of outlaws, when it is not safe at night to light up a store or a residence without having that light shot out, when stores are blown up and their proprietor, one of our foremost citizens; killed was Jeff Archer, and

some fronts broken out at Tate Brady's, when our kangaroo city marshal, chosen by the vigilance committee, Tom Stufflebeam, gets drunk and falls in the river and would have drowned if it had not been for Burl Cox, when bands of outlaws roam the hills on every side of town, it's time good citizens who expect to build a city here and raise their families rise up and assert their rights."

Tulsa's wild and woolish days were formally numbered when a major oil strike well came in some 12 miles south of town on Ida Glenn's farm on November 22, 1905. Within two years Tulsa's population increased by 4,000 to 7,000 and stood at 72,000 by the roaring '20s.

The blessing to the city was not only a booming economy, but a new gentility.

True, gentility is not normally associated with an industry that boasts of workers called roughnecks, toolpushers and roustabouts—but the people who hired those who bore those colorful names and provided ancillary services to those oilfields happened to trek to Tulsa from the more genteel eastern United States.

Two significant events point to that business influence on Tulsa: One, in 1906 Tulsans built an Opera House. Two, Tulsa's government banned drilling for oil within the city's limits. (Oklahoma City, some pointedly point out, did not.) It seems that these rugged oil pioneers did not object to tromping through dusty and/or muddy (and given Oklahoma's weather that could be both or a combination thereof in the same day) oilfields. But when the day was over they wanted to return

to a home and the kind of comforts, cultural and otherwise, that came with city living. Tulsa was that place.

The former cow town proved to be hospitable to this influx of money, manpower, and moxie—the latter of which was in abundance for wildcatters who punched holes in the ground based upon geology and hope was where riches were made, lost, and made again (and often lost again).

This risk-taking legacy is appreciated today with Tulsa Community College's StartUp Cup Powered by the Lobeck Taylor Family Foundation that awards a \$30,000 grand prize in an entrepreneurial competition.

Of course, oil didn't last forever. And with the discovery of oil offshore, many companies immigrated to Houston. The remarkable building in the center of town that had been home to the International Oil Exposition during oil's halcyon days became the QuikTrip Center. Today, the names on two recent large-scale buildings reflect Tulsa's dual nature—The Bank of Oklahoma (BOK) Event Center and the ONEOK Field, home of baseball's Tulsa Drillers. BOK is a respected financial services company with banks in eight states, while ONEOK is a publicly held energy company.

As the nomadic oil companies followed the fields, Tulsa's economy, and the professionals who had provided oil and oil-related companies with services, diversified into aviation and aerospace, telecommunications, construction, health care, education, technology, and manufacturing. And finance—witness BOK. And yet the refineries on Tulsa's west side are an active and profitable reminder of Tulsa's oil and energy heritage. As is ONEOK.

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Newton, O'Connor, Turner & Ketchum

Creating, building and sustaining lasting relationships are keys to the growing success of Newton, O'Connor, Turner & Ketchum. The long-time downtown Tulsa law firm partners with its clients to not only tackle legal issues, but to provide preventive solutions and forward-thinking strategic counsel aimed to maximize the opportunities for success and growth for its clients.

The firm's Labor & Employment Law Group—one of the largest in the region—provides comprehensive preventive and at-need services for employers of all sizes to help minimize work-related issues and avoid costly and disruptive lawsuits. When complex business disputes move to the courthouse, Newton, O'Connor, Turner & Ketchum's seasoned litigators aggressively advocate on behalf of clients before state and federal courts and administrative agencies across the country. Away from the courtroom and into the boardroom, the firm's corporate attorneys guide both entrepreneurs

and established businesses in launching new endeavors or enhancing existing portfolios. And, like any other successful business plan, Newton, O'Connor, Turner & Ketchum's Succession Planning and Estate Planning practice provides and implements thoughtful and effective advice and strategies tailored for meeting specific needs and achieving long-term success for business leaders and their families.

Newton, O'Connor, Turner & Ketchum is rated AV-Preeminent, the highest rating available through the Martindale-Hubbell Peer Review of the legal ability and professional ethics of its attorneys, and is included in the *U.S. News & World Report's* list of Best Law Firms in the country. Newton, O'Connor, Turner & Ketchum is comprised of attorneys who are consistently recognized on a national, regional, state, and local level, to include Super Lawyers, Top Lawyers, Best Lawyers and Rising Stars. President and CEO, Keith Wilkes, says, "While

these accolades are important to prospective clients or those just getting to know us, the most valued recognition comes from helping clients succeed in achieving their goals or legal needs."

Newton, O'Connor, Turner & Ketchum's strong commitment to service and excellence is also demonstrated outside of the legal arena in the many community leadership positions held by the men and women of the firm. Newton, O'Connor, Turner & Ketchum attorneys are actively involved in multi-faceted business, service, charitable, ecclesiastical, and social organizations throughout Tulsa and its surrounding communities. Chairman John O'Connor says, "Excellence starts with people of good and strong character who strive to serve others in every facet of their lives. We aim for excellence in the people we employ and in the businesses we serve." For more information, visit newtonoconnor.com.



Research Wizard

Research Wizard is a special service of the Tulsa City-County Library System. It offers companies, organizations, and individuals talented research professionals to assist them in finding information. The service is fee-based because it uses resources outside of the library and its products are tailored for each client.

Research Wizard recognizes that reliable and timely information is central to business growth. "Companies are challenged by a complex array of information. It can be difficult to identify the best place to go for the answer that is needed. Research Wizard matches business problems to sources that will provide good solutions," reports Martha Gregory, manager of the service.

Research Wizard designs and delivers its services on demand. Research is organized into the following broad categories:

Customers and Competitors

Research Wizard helps companies find information on their competitors and locate new customers. Dun & Bradstreet®, Dow Jones®, and other resources provide access to company news and financials on more than 14 million companies in the U.S. and thousands of foreign corporations. Research Wizard assists clients in designing customer prospect lists and delivers them in a convenient electronic format.

Market Research and Industry Analysis

Research Wizard provides clients with information contained in thousands of market studies. A highly diverse collection of information sources are used to insure the best results.

Trademark Protection, Products, and Processes

Intellectual property protection is a specialty of the service. Research Wizard performs full trademark screenings for companies and legal firms. "We screen new trademarks every week. It is an exciting indicator of new business development in the Tulsa area," says Gregory.

Data-Direct and Current Awareness

Research Wizard taps into an extensive in-house database of economic and demographic information developed over the last fifteen years. "This system contains all the important indicators of Tulsa's business health," states Jennifer Pawlowski, manager of the database. Data may apply to any type of business statistic for any geographic area. Research Wizard subscribes to databases that contain the full text of newspapers and magazines.



Tulsa City-County Library System Research Wizard manager Martha Gregory (left) and database manager Jennifer Pawlowski.

Companies and industries can be tracked on schedule for news of events and trends.

Global Business

International trade continues to be an issue for companies, whether they are concerned about foreign competition or looking for trading partners. Research Wizard has tools to track company import and export activity, to identify the best foreign markets and global suppliers, and to find the contacts and resources their clients need to deal with global business logistics such as brokers, shippers, and trade regulations.

Database Services

Research Wizard will build custom databases for clients. Professionals will identify and gather raw data or use materials provided by clients to design and construct searchable systems of information on companies and industries.

Experienced business researchers know that they will not always find the information they need on the Internet. Research Wizard brings additional

resources into the mix through its collection of 1,000-plus subscription databases and personal contact with primary sources of information. Together, these make a powerful combination that may be outside the reach of a single company. "We are in the business of finding information, so we often think of sources that our clients overlook," reports Martha Gregory.

All services of Research Wizard are confidential, and prompt delivery of findings is standard practice. Delivery methods are set to client specification.

Research Wizard has been part of the Tulsa City-County Library System for 30 years. The talented staff has more than 40 years of combined experience. Estimates are available for clients on a per-project basis. Selected services are available for flat fees. Research Wizard welcomes inquiries about its services. Visit their website at researchwizard.org or call 918.549.7431 for more information.

Small Business

Small Business Makes a Big Impact in the Tulsa Region

Bonnie Montgomery opened The Skin Boutique after being diagnosed with skin cancer at the age of 40. She became passionate about educating others on the importance of taking care of their skin. The Skin Boutique has now been open for more than three years and is a thriving small business in south Tulsa, an ideal location for Montgomery's business.

"Tulsa is a great environment for small businesses," Montgomery said. "It is small enough that we are still able to connect by word of mouth, but large enough to be considered ahead of our time and have a good field for marketing and advertising."

It is no secret that small businesses play a large role in making up the fabric that is Tulsa's economy. Even in a time of economic uncertainty, small businesses have served as a beacon of hope throughout America. It is small businesses that offer a significant source of new jobs, foster innovation and serve the community not only in Tulsa, but also all around the country.

Small businesses help to fuel the economy by providing meaningful jobs, building the reputation of entrepreneurship for the region and attracting workers and customers to the area.

According to the Tulsa Regional Chamber, 82 percent of all businesses in the Tulsa metropolitan statistical area have fewer than 10 employees. That's 29,020 businesses, which combined have a \$3.1 billion impact every year. These businesses provide more than 55,000 primary jobs and an estimated payroll of \$1.4 billion each year to our fellow citizens.

Jim Light, owner of LaMode Cleaners, sees the economic impact firsthand.

"When owning a small business, the money stays here. With a big box retailer, the revenue doesn't stay in town other than what they pay the employees," Light said. "I think small businesses make a huge impact."

The Small Business Administration defines a "small business" differently depending on the industry. A manufacturing business could have as many as 500 employees for the preceding 12 months, while several other industries, such as retailing and agriculture, rely on sales volume over a three-year period.

The Tulsa Regional Chamber offers a variety of resources to small businesses in the community. These resources promote growth and sustainability. Resources available include networking events, business community involvement opportunities, and research mentoring, according to its website.

Thumbtack.com, in partnership with Kauffman Foundation, conducted a national small business survey published May 2012. Data from the survey was collected over two months and was sent out to thousands of small business owners and managers who listed their services on thumbtack.com. The survey had the participants rate their state and city in several categories.

According to the survey, Oklahoma received an "A+" for its friendliness toward small businesses. Other states to receive an A+ were Idaho, Texas, and Utah. Oklahoma City was also among the top-performing cities.

Oklahoma also received an A in other categories such as hiring costs, regulations, licensing, as well as employment, labor, and hiring. The state was awarded a "B" for its tax code and a "B+" for networking programs, according to the survey.

In order to serve as a voice that meets the needs of small businesses in Tulsa, the Tulsa Regional Chamber has developed The Small Business Council. This 25-member board includes professionals who serve as advisors to early-stage businesses and develop programs for the business community. Jim Light has served as a 2011 chair of The Small Business Council.

Light explained that all small businesses are unique in their own way, but share common concerns including environmental concerns, economic concerns, and others. Regardless of what type of business, the primary concern is always focused on keeping your business strong to ensure that the doors stay open.

"A lot of people don't realize how important small businesses are to an economy," Light said. "It has always been that way. The prosperity of the city is a direct reflection of how healthy the local businesses are. Without a doubt, small businesses are the backbone to any metropolitan area. It is no different in the Tulsa area." ◆

CONTINUED FROM PAGE 50

As are the city's two major museums—Phillbrook Museum of Art, and Gilcrease Museum are both nationally recognized institutions because of gifts from oilmen.

The mark of business is everywhere, though the name does not necessarily follow the money.

Take, for example, the latest story of Tulsa business philanthropy.

Tulsa's First Presbyterian Church launched a \$40 million renovation effort just as the stock market plunged in the fall of 2008. The church's senior pastor, The Rev. James Miller, told the *Tulsa World* that he and the chairs of the capital campaign went to Walter Helmerich, noted philanthropist, Methodist, and drilling company executive, for advice on their project. Here is what happened as reported by Bill Sherman in the World:

"At the end Walt said, 'I think I'm going to talk to my friend Henry (Zarrow) when I have lunch with him tomorrow,'" Miller related.

The two older men met regularly for lunch at the Wild Fork restaurant.

"He went to the Wild Fork, he told me, had lunch and walked through the project," Miller said.

Then Helmerich said to Zarrow: "Henry, what would you do if I gave a significant gift to this project?"

Zarrow responded: "I'd give a significant gift to this project."

Helmerich said: "Henry, why would you do that? You're Jewish."

Zarrow said: "Because I love you, Walt."

"I could preach a month of sermons on that," said Miller, who obtained permission to retell the story.

Those two gifts from outside the church were "like a gust of wind that we needed. It was critical at the time, in more ways than the gift. It was the encouragement that went with it."

He said the gifts were substantial.

And substantial, too, were and are the many gifts to Tulsa from its business and service sector. And it doesn't take a poet or a national magazine to tell that story. ◆

energy



We Tulsans are gratified, but not surprised, when outsiders, including high-profile news sources like *Forbes* and Bloomberg's *Businessweek* magazines, suggest our city is among America's best places to live and work.

Pick your favorite descriptor. Our city is beautiful, livable, productive, family-oriented, and friendly.

The key markers for quality of life—affordability, public safety, personal income, education, arts and entertainment, infrastructure, and water—are all in a major upswing. As they say now in the Twitter-sphere, Tulsa is definitely “trending.” We are doubly blessed to be experiencing this progress amid the negativity that swirls around the national and global economic and employment situation in other cities.

Yes, Tulsa's business and industrial community still faces great challenges as it strives to be competitive in an increasingly global marketplace. Our major employment sectors—energy, aerospace, and health care—face uncertain times ahead. But the new dynamism within the Tulsa metropolitan area is propelling our business sector forward at a pace we haven't experienced since the Oil Boom days of the late 1970s.

This fall, Tulsa began the Mayor's Listening Tour. We're visiting businesses and factories in Tulsa and neighboring communities to get a first-hand look at the enterprising people who propel our economic engine. It is fascinating to learn about the diverse and dramatic successes born and nourished here in Green Country.

Recently, we toured the Baker Hughes U.S. Land Artificial Lift manufacturing facility in east Tulsa. The plant, which employs 270 people, is managed by Ron O'Neill, and is a marvel of productivity and efficiency. It is the assembly facility for much of the manufacturing done by Baker Hughes' larger operations in Claremore. Overall, Baker Hughes, a global leader in energy

services for decades, has more than 2,000 workers in metropolitan Tulsa. And Ron says that number could be 3,000 within two years.

On a smaller, but no less exciting scale, a company called Tulsa Gas Technologies continues to be a major innovator in the field of compressed natural gas (CNG) delivery systems. Tom Sewell has labored for years to build his company, banking on the notion that eventually the U.S. would catch on to what many parts of the world already understand—that natural gas is a totally viable alternative to gasoline and diesel for ground transportation fuel. Sewell is finally seeing the compressed natural gas business reach a tipping point and we expect to see his “little company” grow by leaps and bounds in the next few years.

The City of Tulsa has also realized that by managing fleet size and converting to CNG, we will achieve a 23 percent reduction in our carbon footprint over eight years from 2008 to 2015. This is significant when you combine it with the added cost savings our fleet initiative has garnered. We found more than 300 unnecessary cars and trucks in our City of Tulsa fleet that were not being used. By selling those vehicles, we saved \$2 million.

Oklahoma is the third largest producer of natural gas in the U.S., and more than 90 percent of a CNG station can be built using parts manufactured in Oklahoma. Tulsa's economy is largely based on the oil and natural gas industries—our economy was built on oil and gas in the early and mid-1900s, and Oklahoma staked claim to the title “Oil Capital of the World” in our first century of statehood. We can leverage our historic position as the leading region for production, manufacture, and services in relation to becoming a leader in the clean technology industry cluster.

The City of Tulsa itself is helping to expand the CNG market in Tulsa and we support our locally owned, global CNG companies. The City of Tulsa has launched an aggressive program for buying CNG trucks and cars in the last three years, and

we entered the retail market. On Sept. 7, 2012 the city opened a new CNG fueling station at 428 W. 23rd St. for public use. Now, it is easier than ever for consumers to find CNG in Tulsa to keep their vehicles fueled.

By increasing fuel supply, our goal is to interest more consumers, motivate the private sector to install CNG fueling stations, and create more demand, so that more car owners will switch to CNG. Some Tulsans may ask, “What is the difference between CNG and the typical gas you get at a gas station?” You may be surprised that it's nearly a two dollar per gallon difference, which could mean keeping more of your hard-earned money in your pocket.

Our initiative is driven by lowering costs, air emissions, and decreasing the city's carbon footprint. That's great for Tulsa and keeps us off the dirty-air list.

Our Tulsa Transit bus fleet now includes 50 CNG buses, plus CNG-powered paratransit lift vans. All but one of our city-owned refuse trucks are CNG-powered, and we required our new refuse contractor to use CNG trucks on all their routes.

Right here at the City of Tulsa, we are committed to lowering fuel costs with CNG, and cleaning up the air. Other entities around the country also see Tulsa emerging as a CNG leader as our CNG and related industries provide hundreds of jobs for our local economy.

We are growing Tulsa's share of the energy business. The Oklahoma Energy Resources Board (OERB) commissioned the Economic Research & Policy Institute at Oklahoma City University to study the economic impact of the oil and gas industry in Oklahoma. The initial, comprehensive study was completed in 2009, and was updated just this year. The new data shows that the oil and gas industry added nearly 12,000 jobs in the past two years and that the average annual compensation in those jobs is

MAJOR PUBLIC OIL AND GAS FIRMS IN THE TULSA AREA 2013

COMPANY	2011 TOTAL ASSETS ¹	2011 TOTAL REVENUES ¹	2011 NET INCOME ¹	2011 WORLDWIDE PRODUCTION	
				LIQUIDS ²	NATURAL GAS ³
ConocoPhillips	153,230,000	251,266,000	12,502,000	274.0	1,632.0
WPX Energy, Inc.	10,432,000	3,988,000	(292,000)	16.00	430.6
Cimarex Energy Co.	5,428,577	1,757,889	529,932	16.01	120.1
Unit Corp.	3,256,720	1,208,371	195,867	4.750	44.1
Laredo Petroleum Holdings, Inc.	1,627,652	510,270	105,554	3.368	31.71

¹ Thousands of dollars. Source: *Oil & Gas Journal*, September 3, 2012.
² Million barrels.
³ Billion cubic feet.

more than \$113,000. Currently, one of six jobs in the state—more than 344,000 jobs total—are in petroleum-related industries. In the manufacturing sector we have 20,000 people employed in the oil and gas manufacturing business alone, second only to Houston.

The City of Tulsa recently hired a consultant, Mickey Thompson, to help recruit even more energy business and to bring more energy jobs to Tulsa. As a long-time leader in the Oklahoma Independent Petroleum Association, Thompson worked with the governor and legislature to create the OERB.

He also created the Oklahoma Energy Education Foundation and is an experienced oil producer. He is perhaps one of the most knowledgeable people in the nation about all phases of the industry.

We all recognize that elected officials love to trumpet their support for “small business,” attempting to evoke images of rugged individualism and the American dream. As mayor of Tulsa, I’m thrilled to report that I don’t have to make this up. I can look out of my office window and see it. I can shake the hands of some of the 400,000-plus hard-working people in metro Tulsa and feel it.

While our city’s current renaissance is being led again by the energy industry, growth is happening in every business sector in every part of our communities.

The City of Tulsa is striving to be a partner in this progress. There are millions of dollars of improvements underway with our streets, highways, bridges, city services, police, fire, etc. Downtown is alive again.

None of it has happened by accident. None of this has occurred overnight. It never does. Our success story continues. ♦

Blue Energy Fuels

Building the Brand

Compressed Natural Gas (CNG) powered vehicles are not new. As a matter of fact, CNG has been powering cars and trucks since before World War II. Because of advancements in technology, mainly in fuel injection, computerized engine management and CNG fuel tanks, CNG is not just “catching on”—it’s here to stay. CNG is America’s key to energy independence including cleaner skies, and fatter wallets. CNG is on average \$2 per gallon cheaper than gasoline or diesel. CNG is a domestic fuel and we have more of it than any other country in the world. The natural gas supply, unlike crude oil, is not concentrated in the hands of a few mega companies, but in the hands of land and royalty owners numbering in the millions. The natural gas and CNG industry directly employs thousands of Oklahomans and CNG fueling equipment



manufacturing could become the fastest growth industry in Oklahoma with a little effort. As Tom Sewell, the president of Tulsa Gas Technologies says, “we make what makes energy.” In the last CNG market report for the State of Oklahoma, natural gas is now replacing more than 6 million gallons of gasoline and diesel fuel each year. This number grows by a couple of thousand gallons each month. For commercial and private vehicles, Blue Energy Fuels is quickly becoming the brand of choice in Oklahoma.

Blue Energy Fuels’ CNG stations are located at 4809 S. 101st East Ave. Tulsa, OK 74146, Blue Energy Fuels, 101 S. Main, Owasso, OK, and coming soon to West Tulsa. For more information, visit blueenergyfuels.com.

ONEOK

The ONE in Energy

You probably know ONEOK for the warmth delivered to your home every winter. Rightly so—its largest natural gas distribution company, Oklahoma Natural Gas, brings clean-burning natural gas to hundreds of thousands of residents around the state.

What you might not know is that the blue flame burning reliably in your furnace is really just the tip of ONEOK's business.

ONEOK gathers, processes, stores, transports, markets and distributes natural gas, natural gas liquids, and other commodities.

The company operates in more than a dozen states, owns three natural gas utilities, is a leading natural gas marketing company, and is general partner and 43.4 percent owner of ONEOK Partners, one of the largest publicly traded master limited partnerships in the country, which owns natural gas and natural gas liquids assets.

ONEOK is proud to say, it's the ONE in energy.

Committed to Community

As it has grown from a single natural gas distributor in Oklahoma to a Fortune 500 industry leader, ONEOK has remained committed to creating value for its employees, customers, shareholders, and communities.

With corporate headquarters located in Tulsa for more than a century, the company has a long-standing commitment to Tulsa and Oklahoma. The ONEOK Foundation was established in 1997 with a mission to invest in programs that enhance the quality of life and economic well-being of the communities where ONEOK operates and where employees live and work. Since 1997, the Foundation has contributed more than \$40 million



to education, health and human services, arts and culture, and community improvement, which includes contributions to the United Way.

ONEOK employees take pride in contributing their time and money to their communities. For every dollar employees give to non-profit organizations, the ONEOK Foundation contributes an additional dollar, up to \$5,000 per employee for eligible contributions.

Volunteers With Energy, the company's employee volunteer program, has volunteered thousands of hours on projects ranging from the Special Olympics to building houses with Habitat for Humanity.

Powered by ONE

In 2012, ONEOK debuted its "Powered by ONE" mobile exhibit—part of a new community education effort. The "Powered by ONE"

mobile exhibit is a 53-foot, double-expandable tractor-trailer that travels throughout the company's operating areas to share information with employees and communities about the company, how it operates, its commitment to environmental, safety and health initiatives, and other industry-related facts. The exhibit features interactive games that illustrate how natural gas is delivered from the wellhead to customers' homes and tips on how to reduce their carbon footprint. The on-board displays and exhibits are powered by compressed natural gas (CNG), promoting energy efficiency and supporting the company's commitment to clean-burning natural gas.

Philbrook Museum—Second Saturdays

The ONEOK Foundation recently approved a \$200,000 pledge to the Philbrook Museum of Art to help fund the museum's Second Saturdays program. The program offers free admission to the museum for the public and free children's art activities on the second Saturday of each month.

ONEOK's contribution made the company the primary supporter for the program and helps ensure the Second Saturdays program will continue to benefit the Tulsa community for at least two more years.

Anchored by Values

ONEOK continually reflects on its core values as it makes decisions. These guiding principles—ethics, quality, diversity, value, and service—define who ONEOK is and how it works.

ONEOK also takes great pride in its day-to-day dedication and commitment to safety and environmental responsibility so that it can positively impact the communities in which its employees live and work.



Williams

We make energy happen

Our world depends on energy. And though Williams has been in business for more than a century, our mission is more important than ever. There is a growing urgency for energy infrastructure to deliver on the promise of the vast supply of natural gas in North America.

For instance, today, shale gas represents 30 percent of the U.S. supply, and it is expected to represent 50 percent within the next 25 years. That means the emerging shale basins will require new, large-scale infrastructure for natural gas and natural gas liquids. Low-cost natural gas opens up opportunities for industrial customers, for growing power generation markets and for producers that are consolidating their positions in growth basins and need to connect their natural gas to the highest value markets.

Building infrastructure to connect these new supplies of natural gas and natural gas liquids to growing markets is vital. And it takes a company with Williams' expertise to make that happen.

With abundant new resources being developed, this is certainly an exciting time to be in the energy business. Williams is extremely well positioned to help meet this soaring demand for new pipelines, processing plants, and offshore facilities. In fact, the company has more than \$25 billion in potential projects identified through 2017.

Currently, Williams owns interests in or operates 15,000 miles of interstate gas pipelines, 1,400 miles of NGL and olefins trans pipelines, and more than 10,000 miles of oil and gas gathering pipelines. The company's facilities have daily gas processing capacity of 6.6 billion cubic feet of natural gas, and natural gas liquids production of more than 200,000 barrels per day. These assets are located in the Rocky Mountains, Gulf coast, Pacific Northwest, Eastern Seaboard, Canada, and Pennsylvania.

Through assets owned by an affiliate, Williams Partners, Williams gathers and processes natural gas in the Rockies and both onshore and offshore in the Gulf of Mexico. Also in the Gulf of Mexico, Williams is building a proprietary floating production system called Gulfstar that

will reduce start-up times and costs for offshore field development. The facility was designed so that U.S. fabricators could build it right here in the U.S., creating approximately 1,000 jobs for 30 months across more than 20 states.

Via Williams Partners' extensive network of large-diameter interstate pipelines, Williams also transports natural gas thousands of miles from production areas to local utilities, power plants and large industrial users. For example, the Transco pipeline system brings gas from the Gulf of Mexico all the way up the Eastern Seaboard. In fact, Williams delivers approximately 50 percent of the gas consumed in New York City.

In pursuing the enormous opportunities presented by the growing demand for energy infrastructure, we acknowledge and accept our obligation to do so responsibly. Being a good steward to the environment and a good neighbor to our communities are responsibilities we take to heart. Williams is proud to have its headquarters located in Tulsa—a city that is committed to economic development and community enrichment.



Public Service Company of Oklahoma

A Century of Light

Public Service Company of Oklahoma (PSO) celebrates its Centennial this year as a provider of electricity and partner in the growth and development of Tulsa and all of Oklahoma. The Tulsa-based utility provides customers excellent value, offering some of the nation's lowest electricity prices while delivering electric service that ranks among the nation's most reliable.

PSO's origins date to Oklahoma's pre-statehood years, starting with the 1889 chartering of the Vinita Electric Light & Power Company to provide electric service in Indian Territory... just 10 years after the incandescent light bulb was perfected.

PSO was incorporated May 29, 1913, merging the Vinita utility with small power companies serving Tulsa and McAlester.

It was a humble beginning with 3,600 customers... about half in Tulsa. Initially, PSO's side business of producing and delivering ice through its People's Ice Co. subsidiary overshadowed the electric side.

Today, PSO provides electric service to 535,000 customers in 232 communities across 30,000

square miles of eastern and southwestern Oklahoma, with about 285,000 customers in Tulsa. PSO is an operating utility of American Electric Power, based in Columbus, Ohio.

PSO is a major consumer of Oklahoma-produced natural gas in the manufacture of electricity and, with 690 MW of wind energy under long-term contracts, it is a leader in supporting Oklahoma's wind energy industry. Today, wind power comprises approximately 14 percent of PSO's energy supplies.

Helping customers improve energy efficiency is an area of increasing importance. Customers today want better control of energy usage and electric bills; making this happen also helps PSO delay building costly new power plants. To accomplish this PSO offers targeted incentives for enhancing structures and upgrading efficiency of appliances and industrial processes.

PSO is a committed partner in community involvement; its 1,500 employees invest thousands of volunteer hours annually at schools, community events, civic projects, and provide leadership for nonprofit agencies. PSO provides financial support to hundreds of organizations contributing to

community well-being and vitality in areas of higher education, economic development, environmental stewardship, human needs, and the arts.

PSO is a leader in establishing programs for early childhood education in Oklahoma. Since 2004, PSO and the American Electric Power Foundation have donated more than \$700,000 to Smart Start Oklahoma for early childhood literacy programs. Overall contributions statewide to education initiatives pre-K through 12 total nearly \$2 million over the past 10 years.

PSO is now writing the next chapter in its illustrious history as a force for Oklahoma's growth and development. The pioneering spirit of its early years carries on as it addresses today's challenges—delivering reliable, low-cost electricity sustainably, providing customers with unparalleled service, and remaining an excellent value. PSO looks forward to building on its partnership with Tulsa and its many Oklahoma communities to enhance the quality of life for all.



Erected in 1955, the illuminated marquee atop PSO's Tulsa Power Station is a familiar landmark for generations of Tulsans. The 374-megawatt power plant, which is fueled by natural gas, is located on the west side of the Arkansas River south of downtown Tulsa. The power plant was originally built in 1919 and has been upgraded many times since. Statewide, PSO owns 4,308 megawatts of generating capacity.

finance

There is no questioning the fact that Tulsa's financial sector has been and continues to be a driving force in the growth of our city. Thanks to a disciplined, conservative stewardship of our region's finances, the Tulsa financial sector has aided in the growth and success of our business community.

Our area financial institutions have also realized the growth experienced by the Tulsa business community. Assets, capital, and loan volume all continue to improve. Tulsa banks, credit unions, and other financial institutions realize this growth is a result of not only offering the best products and services at competitive rates, but in doing so in such a way that makes it convenient to the business consumer.

In reality, delivering an exceptional customer experience is the best way to grow in any industry. Think about why you choose to do business with

your current financial institution. Chances are that it was a combination of convenience features including branch locations, availability of mobile products, plus exceptional customer service—not just rates.

In the economic climate in which we operate today, it is tough to attract new financial business based only on rates. You need to offer conveniences such as online banking, mobile banking, and apps for smartphones and tablets. All of these services and products tie back to exceptional customer service. Tulsa area financial institutions are fully aware that the old ways of

conducting financial business have changed. The business consumer today wants to access and manage their finances when and where they want—not just 9 to 5. Financial institutions that focus on providing the easiest and most convenient delivery channels needed by the business consumer will continue to attract and retain business.

In the future, look for the focus of leading Tulsa financial institutions to remain on the delivery of exceptional customer service. While competitive rates and valued products will always factor into the successful business mix, exceptional customer service is a proven way to keep the business consumer happy. Financial institutions that pay attention to this fact will continue to grow and prosper right along with our business community.



ONB Bank



ONB Bank and Trust Company is a \$600 million community bank with eight locations in Oklahoma, including the communities of Tulsa, Sapulpa, Owasso, Stillwater, and Edmond. ONB Bank is part of Central Banccompany, a \$9.8 billion, bank holding company with 13 full-service community banks in 235 locations and 66 communities, serving consumers and businesses in Oklahoma, Missouri, Kansas, and Illinois.

For the third year in a row, Central Banccompany has been recognized as one of America's Best Banks by *Forbes* magazine in the *Forbes* 2012 analysis of the nation's 100 largest financial institutions. "We are pleased and honored to be recognized by *Forbes* as one of America's top banks," said Bryan Cook, Central Banccompany CEO. "We have held steadfast to our mission of ensuring that we provide strong community bank management, while offering our customers leading edge financial products and superior service."

In these challenging times, ONB Bank remains safe and secure because of its strong roots and commitment to prudent banking practices. ONB Bank is committed to being a leading financial service provider in the communities it serves by continuing to provide customers with quality financial solutions and exceptional customer service.

Let ONB Bank be your business resource. Contact them for the financial tools and expertise you need to grow your business or handle your personal financial needs at 918.477.7400. More information about ONB Bank is available at onbbank.com.

Commercial Banks in Tulsa MSA

BANK NAME	ASSETS ¹	DEPOSITS ¹
American Bank	29,741	23,327
American Bank and Trust Company	194,673	170,369
American Bank of Oklahoma	144,728	122,779
American Exchange Bank	70,429	62,537
American Heritage Bank	792,613	592,985
Arvest ²	13,632,169	11,553,318
AVB Bank	259,975	220,195
BancFirst ²	5,653,792	5,119,603
Bank of America ²	1,445,093,157	1,062,273,625
Bank of Commerce	148,918	129,783
Bank of the Lakes, N A	213,039	192,818
BOKF, N A	24,415,055	18,607,261
Citizens Bank of Oklahoma	164,077	146,701
Citizens Security Bank & Trust Company	663,580	597,216
Cleveland Bank	66,026	60,937
Community Bank	77,721	71,725
Exchange Bank	89,680	79,162
F&M Bank & Trust Company	2,139,054	1,928,233
First Bank & Trust Company	252,797	225,063
First Bank of Owasso	229,942	204,724
First Fidelity Bank, N A ²	1,152,602	911,249
First National Bank and Trust Company of Broken Arrow	187,207	169,597
First National Bank and Trust Company of Okmulgee	235,807	205,384
First National Bank in Hominy	42,078	37,591
First National Bank in Pawhuska	30,868	27,397
First National Bank of Coweta	68,622	62,821
First National Bank of Pawnee	66,048	58,251
First Oklahoma Bank	183,401	166,756
First State Bank	41,101	35,469
First State Bank of Porter	37,159	31,144
First United Bank & Trust Company ²	2,162,604	1,791,485
Freedom Bank of Oklahoma	41,490	36,378
Grand Bank	205,215	152,507
IBC Bank ²	9,499,364	6,752,164
JPMorgan Chase Bank, N A ²	1,812,837,000	1,162,998,000
Lakeside State Bank	55,110	48,722
MidFirst Bank ²	9,842,942	6,017,491
Morris State Bank	66,835	59,551
ONB Bank and Trust Company	559,687	467,931
Osage Federal Bank	151,413	112,023
Patriot Bank	89,309	73,632
Peoples Bank	108,429	95,421
RCB Bank	2,038,184	1,738,569
Security Bank	411,549	362,804
SpiritBank	1,068,164	878,857
Stillwater National Bank & Trust Company ²	1,923,348	1,535,257
Summit Bank	234,864	204,984
Triad Bank, National Association	161,808	140,567
Tulsa National Bank	160,177	128,676
UMB National Bank of America ²	609,177	350,109
Valley National Bank	221,669	196,917

¹ Thousands of dollars.

² Banks outside the Tulsa MSA.

Data Notes: Financials represent total amounts for all locations of each bank. TMSA (Tulsa Metropolitan Statistical Area) is comprised of Creek, Okmulgee, Osage, Pawnee, Rogers, Tulsa and Wagoner Counties. Source: Federal Deposit Insurance Corporation, Statistics on Depository Institutions. Data as of June 30, 2012.

Tulsa Federal Credit Union

As the differences between banks and credit unions become more and more noticeable, Tulsa Federal Credit Union (TFCU) has quietly positioned itself to be a major player in the local financial market for both the individual consumer as well as Tulsa's business community.

What exactly is the difference between a bank and a credit union? What are the specific benefits? A credit union—like Tulsa Federal—is a cooperative financial institution in which individuals pool their money to provide loans

and services to members (members being the important term). In the United States, credit unions are nonprofit entities (unlike banks), and their cooperative structure is designed to ensure fair dealing. Additionally, anyone who belongs to a credit union must first qualify to join under a particular institution's field of membership, however broad it might be. All deposits with a credit union are insured to at least \$250,000 by the National Credit Union Association (much like the FDIC for banks).

Why join Tulsa Federal Credit Union? Because it's a nonprofit organization with more than 55,600 members and assets of \$618 million. Any "profits" earned are returned to the membership in the form of higher dividends and lower loan rates as well as reduced costs on the many services you might otherwise have to pay at a regular banking institution. Lower operating costs at TFCU are highly important in today's roller-coaster economy because greater efficiency means reduced costs to the membership.

All 12 Tulsa area Tulsa Federal Credit Unions offer full financial services such as individual and corporate checking accounts, savings programs, consumer and business loans, a wide variety of mortgage plans at much lower rates, plus online and mobile banking. But the difference is in membership. As a bank customer, you're more likely to be subjected to the whims of the economy and the necessary profits banks have to produce. At TFCU, membership means the users and the members of the cooperative are the same people and its services are tailored to the people who use them rather than a focus on profits. Also at TFCU, each member, regardless of how small or large his or her holdings may be, has a voting share in the election of TFCU's Board of Directors who will recommend (and deliver) what the members actually want . . . something a bank cannot and will not do. Additionally, on the local level, (and, very important to the membership), Tulsa Federal and its employees are very active in the Tulsa area, supporting various nonprofit and service organizations along with numerous community projects.

Tulsa Federal Credit Union is also positioning itself as a perfect financial resource for the small business. While a bank might be a better fit for a very large company, TFCU is equally as suitable for smaller, family-type businesses that want more personal attention at much lower cost and without sacrificing services or convenience. With 12 metropolitan locations, lower loan rates, plus the reward of someone actually looking up and greeting you when you walk in the door (after all, you are a member!), TFCU is the perfect choice for the small business owner in and around Tulsa.

For more information, visit tulsafederalcu.org.



Greg Gallant, President and CEO of Tulsa Federal Credit Union.

aviation & aerospace

When non-Oklahomans are asked what comes to mind when they hear the word Tulsa, they generally mention oil, the dust bowl, Native Americans, and sometimes even Art Deco architecture. All of these answers are part and parcel of Tulsa's past, present, or both. Most people quizzed about our city don't realize that even before the dust bowl days, Tulsa was on its way to becoming known as the Aviation Capital of the World.

Oilmen were some of the earliest users and proponents of aviation. They understood the utility of airplanes for flying parts to a distant drilling rig in need of the new bit or racing to be the first to sign an oil lease on a promising new patch. They also understood that these new-fangled machines used far more oil and gas than automobiles so it was in their best interest to help promote this new form of transportation. As the rich and powerful in the community, the oil barons had the capacity to see that things got done and went their way.

When Charles Lindbergh made his famous flight across the Atlantic in 1927, the country became instantly air-minded. Upon his return to the U.S., Lindbergh began a goodwill tour around the country to promote aviation and its possibilities. When Tulsa's city fathers found out about the proposed tour, they inquired about him coming to Tulsa. Upon learning that Tulsa was not one of their intended tour stops, the Chamber of Commerce, made up mostly of oilmen, was persuasive. They promised a large crowd for his arrival in September because the Tulsa Fair and the International Oil Exposition would both be underway. The Lindbergh team finally acquiesced and Lucky Lindy arrived on September 30, 1927, landing at Duncan McIntyre's airfield, a small privately owned facility in east Tulsa. That evening, at a dinner in his honor, Lindbergh addressed the gathering and advised them to build a municipal airport or they would be bypassed by the fast-paced industry of aviation. The Chamber, taking Lindbergh's advice to heart, set to work to find a suitable location for the new municipal



Tulsa International Airport.

airport. By July of 1928 they had not only found the location but had laid out the runways, constructed an administration building, and built hangars. Tulsa was on its way to the future, by air!

Lindbergh had promised that, if you build it, they will come, and come they did! Oilman W.G. Skelly opened his brand new Spartan Aircraft Company, just south of the fledgling airport and soon he would open his Spartan School of Aeronautics situated on the airport, all before the end of 1928. Oilman Erle Halliburton from Duncan, Oklahoma, created Tulsa's first airline, Southwest Air Fast Express, known as S.A.F.E. Way Airlines. The airline lasted less than a year as it was gobbled up with other small airlines that would coalesce into American Airlines, earning Halliburton a cool million in the process. The Braniff brothers, Tom and Paul, were waiting in the wings to take up the slack. Beginning in 1929, they started Tulsa-Oklahoma City Airlines that would eventually become Braniff Airlines. Tulsa Municipal Airport manager, Charles W. Short, made sure that everyone in aviation knew that Tulsa was open for business. He personally invited everyone that was anyone in aviation to stop in and see him and the new airport. The airport ledgers of incoming aircraft, their pilots, and passengers listed names like Jimmy Doolittle, Amelia Earhart, Ira Eaker, Wiley Post, Will Rogers, Frank Hawks, Pancho Barnes, Admiral Richard Byrd, and many more. Tulsa was on its way and the sky was the limit.

By 1930, Tulsa's airport was touted as the busiest airport in the world. Throughout the decade of the 1930s improvements would be made to the airport such as the construction of a new terminal building that was designed in the Streamline style of architecture. Concrete aprons were poured around the new terminal, runways were paved, and a beacon was added for night operations. By the early 1940s Tulsa was selected by the War Department to receive a new aircraft manufacturing plant. Known officially as Air Force Plant #3, to Tulsans it was simply the bomber plant. During World War II it was operated by the Douglas Aircraft Company, and thousands of aircraft were produced. During the same time period a modification plant, also operated by Douglas, was opened and was known as the Tulsa Mod Center. At the end of World War II both Douglas plants were closed and Spartan was losing both manufacturing and training contracts with the federal government. Tulsa's aviation future was on hold, but not for long. In 1946, American Airlines decided to move its maintenance base from New York to Tulsa, locating in the closed Mod Center. By 1951, the bomber plant was reopened to build the Boeing B-47 bomber under license and, again, Douglas was at the helm.

Tulsa's industrial capacity was slowly rising from the ground, morphing the city into an aerospace powerhouse for the coming decades. While the 50s brought Tulsa into the jet and rocket age, the 60s catapulted the city into the space age. With President Kennedy's 'moon speech' in May of 1961, Tulsa was poised to play a major role in nearly every phase of the manned space program, including Apollo, the Space Shuttle, and the International Space Station.

Today, Tulsa's aerospace future looks bright. Throughout the city, manufacturing is ongoing on such enormous programs as Boeing's 787 Dreamliner, Airbus' A380, and Gulfstream's G650, to name a few. With international companies

Spartan College

Spartan College of Aeronautics and Technology

Founded in 1928 by W.G. Skelly, Spartan College of Aeronautics and Technology has continued to be the cornerstone for Oklahoma aviation education. In 1926, less than twenty-five years after the Wright Brothers first powered flight, local oilman W.G. Skelly founded the Spartan Aircraft Company. Shortly thereafter, Mr. Skelly saw the need to train pilots and mechanics to support this new and exciting industry called aviation and formed Spartan School of Aeronautics later named Spartan College of Aeronautics and Technology. Spartan became world renowned during the war years by training thousands of Army Air Corp pilots and mechanics and pilots for the Royal Air Force.

Today, owned by Oklahoma businessmen, the college spans more than 247,000 square feet of training facilities on three campuses located on two Tulsa area airports. Spartan's continued philosophy of offering hands-on training combined with requisite theory prepares Spartan graduates for immediate placement opportunities after graduation. Spartan offers programs in aviation maintenance, avionics maintenance, professional pilot, nondestructive testing and quality control. Diploma, associate degree and bachelor's degree options are available. Spartan is accredited by the Accrediting Commission of Career Schools and Colleges and licensed by the Oklahoma Board of Private Vocational Schools. For admissions information call 1.800.331.1204 or logon to spartan.edu. The main office for admissions is located at 8820 E. Pine Street, Tulsa, Oklahoma, 74115.



TULSA REGION MAJOR AVIATION COMPANIES 2011

COMPANY	INDUSTRY	EMPLOYEES
American Airlines, Inc.	Aircraft Maintenance & Aviation Services	7,000
Spirit Aerosystems, Inc.	Missile Guidance Systems & Equipment	3,001
The Nordam Group, Inc.	Aircraft Components Manufacturing & Structural Repair	1,543
FlightSafety International, Inc.	Flight Simulators	650
Labinal Aero Defense Systems	Aircraft Equipment Manufacturing	500
Walden's Machine, Inc.	Aerospace Industry Machining Services	285
Navico, Inc.	Sonar Systems & Equipment	250
Bizjet International	Aircraft Service & Maintenance	220
Precise Machining & Mfg., LLC	Aircraft Parts Manufacturing	210
Southwest United Industries, Inc.	Aerospace Industry Metal Finishing	175
Honeywell Lori, Inc.	Aircraft Components Manufacturing	172
Ducommun LaBarge Technologies, Inc.	Space Vehicle Communication Equipment	170
Pryer Machine & Tool Co., Inc.	Aircraft Parts & Navigation Equipment Manufacturing	155
AMI, Inc.	Aerospace Electronics	121
First Wave Aviation, LLC	Aircraft Equipment & Parts Wholesale	120
Helicomb International, Inc.	Helicopter Parts Manufacturing	100
Limco Airepair, Inc.	Aircraft Repair Services	93
Lufthansa Technik Tulsa Corp.	Air Transportation Equipment Services	90
Precision Components Co., LLC	Aircraft Engines & Parts Machining Services	85
LMI Finishing, Inc.	Aircraft Parts Finishing	80
CSI Aerospace	Aircraft Equipment & Parts Wholesale	77
Safety Training Systems, Inc.	Airline Training Devices Manufacturing	74
Drake Air, Inc.	Aircraft Maintenance & Repair Services	60
Ametek, Inc.	Aircraft Maintenance & Repair Services	60
Abbott Industries, Inc.	Aircraft Engine Repair	55
Covington Aircraft Engines	Aircraft Engine & Engine Parts Manufacturing	55
Autopilots Central, Inc.	Avionic Equipment & Repair	50
Mercury Air Center Tulsa, Inc.	Aircraft Repair & Wholesale	50
Qual-Tron, Inc.	Sonar Systems & Equipment	50

Source: Dun & Bradstreet & Reference USA, 2012. Number of employees may be estimated.

such as Lufthansa Technik and Mitsubishi Heavy Industries locating in the community, Tulsa is gaining a strong global presence in aerospace. Growth is also anticipated in the Unmanned Aerial Systems (UAS) arena for military and commercial

applications. With well over 300 aerospace-related companies in the Tulsa area, the city is sure to become an important participant in this fast developing facet of aerospace. ◆

high tech

As the National Academy of Engineering publication entitled *The Engineer of 2020* points out, “If the United States is to maintain its economic leadership and be able to sustain its share of high-tech jobs, it must prepare for a new wave of change.” In Tulsa, we are fortunate that our local leaders from the business, government, non-profit, and higher education communities recognized this “new wave of change” many years ago and joined forces in a forward-thinking and collaborative way to respond. Access to higher education is a key factor in creating a setting that cultivates the production of a high-tech workforce and, in the Tulsa region, such access to higher education has never been better. From our technology centers, community colleges, regional universities, to our comprehensive doctoral granting universities, students have a wide variety of science, technology, engineering, and mathematics (STEM) educational programs to choose from. Further, more emphasis is being placed upon graduates in STEM fields to satisfy the ever growing needs of our high-technology-focused employers.

In his book *The Knowledge Seekers*, W. Arthur Porter reminds us that “to gain a competitive advantage in a changing global economy, we must take advantage of our community’s intellectual resources—its human capital.” Porter goes on to say, “The wealth of any community is no longer tied to natural resources or the industrial base but to how well its leadership is able to leverage knowledge.” To that end, Tulsa’s research community is growing, fostered by trailblazing investigations being conducted within our comprehensive universities in partnership with industry, government, and non-profit organizations. Notable examples are evident in such diverse areas as nanotechnology, advanced materials and systems for infrastructure and aerospace, cybersecurity, medical informatics and knowledge management, energy efficiency and policy, and biotechnology.

Another essential ingredient to the long-term vitality of our economy is a vibrant and expanding base of “homegrown” high-tech enterprises, and the next generation of high-tech entrepreneurs is being educated and mentored in our colleges

and universities. Every year, student teams from across Oklahoma come together to compete in the Donald W. Reynolds Governor’s Cup Collegiate Business Plan Competition, gaining invaluable experience and honing their entrepreneurial ideas and skills. Many of these students go on to work in Oklahoma-based start-up companies or to create their own companies. We are fortunate that Tulsa is the home of several business incubators that provide important guidance and support services to these budding entrepreneurs.

From this new generation of high-tech specialists and entrepreneurs will emerge the future leaders who, through their creativity and innovation, will ensure our prosperity in the global economy of the 21st Century, thereby enhancing our community, standard of living, and quality of life. ◆



manufacturing

While the nation continued to deal with a lengthy economic slowdown, local manufacturers felt blessed as regional conditions remained relatively bright. Tulsa-area factories saw activity remain mostly steady in 2012 and that was enough to outpace other parts of the country. Attitudes remain cautiously optimistic that better times are ahead. The ability to endure is a trait that has served Tulsans well over the past century, and that enduring nature provides a backdrop for the cautious optimism that prevails among area manufacturers.

“Economic uncertainty hangs like a low cloud over everyone’s business,” says Christine Allison, a manufacturing extension agent for the Oklahoma Manufacturing Alliance. “But for now, production in the metro area remains solid. There’s a great deal of self-awareness and everyone understands we are fortunate—that manufacturing circumstances are much worse throughout the rest of the country.”

The impact of a healthy manufacturing sector on Tulsa’s economy can’t be overestimated. In the region, manufacturing pays 45 percent higher salaries when compared to all other industries. There are about 50,000 manufacturing wage-earners in the Tulsa metropolitan area, according to the Bureau of Labor Statistics. Employment has gradually climbed back to pre-recession levels and currently one in eight Tulsa workers is employed by a manufacturing company. Fortunately for northeastern Oklahoma, many of those jobs are clustered in economically fertile industries.

“Even after years of diversification, local manufacturers are still firmly grounded in the petroleum and aerospace industries,” Allison says. “Those happen to be two robust sectors. But it’s also important to remember that even though large manufacturers often grab headlines

when they are expanding or closing, the vast majority of production is done by small- and medium-sized companies. These manufacturers are flexible and better able to adapt to changing conditions. That’s a real advantage when dealing with economic uncertainty.”

Larry Mocha owns one of those small companies. As president of Air Power System, a Tulsa company with 50 employees that manufactures pneumatic cylinders and valves, he’s seen his share of hard times over the years but seems to always persevere.

“We anticipate sales to be greater next year,” he says. “Activity in the oil fields, along with construction of roads and bridges, indicates these markets should be busy for three to five years. We’ve had two solid years of growth and look forward to that trend continuing, but probably at a more subdued pace. We also are expanding into new markets like solid waste and snow plows. We are constantly exploring new markets for our product lines.”

“I think now that the elections are behind us, a lot of uncertainty is removed. That should help businesses plan for the near future and make more definitive strategic decisions,” Mocha adds.

Evan Hudson agrees. He’s vice president of Tulsa Centerless Bar Processing. “I think that company leaders were waiting until after the elections to make major decisions on purchasing and hiring. We may see more significant investments this year—a more forward-looking business vision.”

Tulsa Centerless Bar is home to more than 40 employees. From its 35,000-square-foot factory, the company turns out the highest quality grinding, straightening, saw-cutting, sandblasting, and heat-treating services for long bar products.

“It’s an exciting time for us,” Hudson says. “We continue to invest in our people, equipment, and facilities. We want to make sure we are positioning ourselves for whatever is to come.

That’s not to say there aren’t still significant challenges for small business, especially in dealing with the new health care laws and with broader geopolitical issues.”

“If the past few years have taught us anything, it’s that the business environment can change very quickly,” he continues. “Being nimble and able to adapt is a challenge. And of course in the longer term, we would like to see more people interested in working in manufacturing.”

A shrinking labor pool and the absence of available skilled employees is a primary concern for Mocha, as well. “Finding the right employees continues to be my biggest struggle and I’m afraid that problem is only going to get worse. It is difficult to find people who want to work and who have appropriate skills. When we find and hire talented people, the cost of that new employee is usually greater than our existing talent. That puts an upward pressure on salary. This pressure combined with the uncertainty of our new health care laws makes planning and budgeting very tough.”

But the most successful manufacturers know the only constant is change. Hudson believes innovation and diversification have become more critical than ever to individual firms and the American manufacturing sector as a whole.

One Tulsa manufacturer is taking that philosophy to heart. Long recognized as a leader in the heavy lifting industry, Gunnebo Johnson is preparing an aggressive expansion into a number of different industries. “Our focus is to be the world leader in lifting and pulling materials and designing custom applications,” says Craig Aszkler, Gunnebo Johnson President and CEO.

CONTINUED ON PAGE 66

The company began in the 1930s in the oil-field tool manufacturing business. A line of wellheads bearing the famous Hinderliter name was developed, followed by the introduction of Johnson crane blocks.

These lines were expanded with the addition of overhaul balls, wedge sockets, swivels, specialty blocks and, of course, a complete line of snatch blocks and sheaves, heavily used in the oil field. Snatch blocks are lift blocks utilized in towing and recovery industries.

Gunnebo Johnson products are at work every day around the globe—from specialty swivels deep in the ocean, to blocks and sheaves in the Gulf of Mexico and the harsh North Sea. Unique Gunnebo hooks were used to lift the space shuttle solid fuel rocket boosters.

The company's leadership is especially proud of the ongoing production of key components for the Asian Hercules III Project. This floating sheerleg crane will be one of the largest in the Far East, and is being constructed in the port city of Nantong, China. The company is responsible for the custom design and manufacturing of the heavy lifting components, which have begun shipping to China for installation on the giant ship-mounted crane.

Spanning a 24-month project timeframe, the company has designed and is manufacturing the complete lifting tackle, including sheaves, blocks and lifting beam sets. When completed, the 5,000 Metric Ton-rated Asian Hercules III will be able to reach up and out over 500 feet for making marine offshore lifts. A smaller Asian Hercules II also utilizes the unique tackle and beam lifting system.

"Our goal is to not just focus on a segment such as the heavy lifting industry," says Guy Minnix, vice president of North American sales and marketing. "Our goal is to focus on several different segments and to develop the products around those segments. We don't want to be known just as a crane block company."

Gunnebo Johnson is among the numerous manufacturers taking advantage of a continued weak dollar. It means American-made products are cheaper overseas and opens the door to new, international customers.

"The dollar is still low and with rapid growth in many emerging economies, exports are the fastest-gaining segment of manufacturing sales," Extension Agent Christine Allison says. "That puts many U.S. firms in a better position to compete in international markets."

The Oklahoma Manufacturing Alliance coordinates a program that helps state manufacturers increase their foreign-customer base. A joint effort with the Oklahoma Department of Commerce, ExpOrTech helps companies enter or expand into global markets. It assists in the development of a customized international growth plan, which is vetted by experts and supported by a team of organizations that help companies move quickly beyond planning to actual export sales. Participants work as a group through a process to accelerate the pace and increase the success rate of international sales efforts. Unlike a static classroom environment, this course is customized to the specific learning needs of participants and produces an international growth plan for each company. During the

three sessions, spanning approximately three months, the participating companies gain an understanding of how exports can be a major growth driver, identify hurdles to expansion, and work with the facilitators to develop a customized international growth plan for their company.

One state manufacturer recently completed the program and its exports increased a dramatic six-fold. The company—which entered the sessions with few foreign sales—anticipates exports will now remain about 40 percent of its total revenue.

Also, the Manufacturing Alliance recently launched a new Innovation Engineering project to help smaller companies commercialize unique and cost-effective ideas. It's an accessible process for businesses that may not have the internal resources to develop new ideas and move unique products to market.

A plethora of other local resources help maintain the city's progressive atmosphere. Tulsa's higher-education institutions provide strong support for the industry. The University of Tulsa, Oklahoma

TULSA MANUFACTURING MIX 2012

SECTOR	SIC	FIRMS	EMPLOYEES
Primary & Fabricated Metal Industries	33-34	494	14,607
Machinery (except electrical)	35	486	9,027
Transportation Equipment	37	96	6,277
Food, Beverage, & Tobacco	20-21	104	4,353
Measuring & Analyzing Instruments	38	120	3,333
Printing, Publishing, & Allied Industries	27	365	2,781
Computers, Electrical, & Electronic Equipment	36	139	2,758
Plastic & Rubber Products	30	73	2,131
Glass, Stone, Clay & Concrete Products	32	78	1,897
Chemicals & Allied Products	28	137	1,856
Petroleum Refining & Related Industries	29	44	1,800
Paper Products	26	29	1,539
Miscellaneous Manufacturing Industries	39	261	1,464
Apparel, Textiles, Leather	22,23,31	129	814
Lumber & Wood Products	24	95	612
Furniture & Fixtures	25	35	392
Total		2,685	55,641

Sectors are based on SIC (Standard Industrial Classification) codes 20-39.
 Source: Based on data from Dun & Bradstreet, October 2012.
 Compiled by Research Wizard, Tulsa City-County Library.
 Geographic Region: Tulsa Regional Statistical Area.

State University-Tulsa, Tulsa Community College, Rogers State University, and Northeastern State University-Broken Arrow work closely with the Oklahoma Manufacturing Alliance and area manufacturers to strengthen the workforce.

Other valuable educational resources supporting manufacturing development include the Advanced Technology Center at OSU-Tulsa (part of Vision 2025), the Oklahoma Center for Integrated Design and Manufacturing (a joint effort of OSU, OU, and TU) and custom-designed associate-degree programs developed by Tulsa Community College.

The Business and Industry Training Service at Tulsa Tech is among the most effective in the nation. Tulsa Tech recently opened a new automotive, robotics, and manufacturing facility at its Broken Arrow Campus. Programs there will focus on advanced manufacturing principles with an emphasis on alternative fuels technology.

The Tulsa Regional Chamber also understands the importance of manufacturing, says Larry Mocha. "Partnering with the city's political leaders, the Chamber has manufacturers in strategic leadership positions and works with local and state political leaders to create a pro-business climate for manufacturers."

The Chamber consults with manufacturers when establishing its legislative agenda. "Because legislative issues are so important to manufacturers, the Chamber continually monitors the pulse of the industry and helps provide access to legislative leaders. Helping create a pro-business atmosphere is a vital part of local and state politics," he adds.

Evan Hudson hopes the country will continue to develop an atmosphere that fosters innovation and domestic manufacturing.

"We are very capable of manufacturing world-class products competitively in America and particularly in Oklahoma," he says. "People

are what give Tulsa and Oklahoma an advantage. In my opinion, there is a culture in our state that rivals that of anywhere in the world for work ethic and ingenuity."

But it goes beyond territorial pride. Allison says there are quantifiable advantages. "With a central location, the proximity keeps freight bills lower and that makes a competitive difference. Beyond that, the manufacturing community seems to embrace each other and share ideas to make us all successful."

Larry Mocha summed up the hopes of many. "I was born in Tulsa and lived here all my life. With my business, I have traveled all over the world. I always like coming home and really prefer not to leave. We have something for just about everyone and I think someday Tulsa will formally be recognized for the entrepreneurial opportunities it gives to new and existing businesses. ♦

Kimberly-Clark Corporation

Jenks mill makes products that help company achieve its vision to lead the world in essentials for a better life

The Kimberly-Clark Corporation (NYSE: KMB) mill has been a fixture in Jenks for more than two decades. This year, Kimberly-Clark's Jenks mill is celebrating 22 years of innovative manufacturing and actively contributing to the local community.

Opened in 1990, the Jenks facility manufactures products that help Kimberly-Clark achieve its vision to lead the world in essentials for a better life. The 1.8 million square-foot mill produces Kimberly-Clark's premium Kleenex®, Cottenelle®, and Scott® bath tissue as well as Scott and Viva® paper towels. The 342-acre mill site also houses a distribution center. The Jenks facility currently has about 400 employees who are committed to serving their community through a variety of local organizations including the Tulsa Area United Way, the Tulsa Regional Chamber, and Junior Achievement.

Two decades of progress

Ground was first broken for the Jenks mill in 1988, and the facility was completed and opened for

business two years later. The first product to roll off the assembly line was Kleenex Premium Bathroom Tissue. Following Kimberly-Clark's 1995 merger with Scott, the plant added Scott bath and paper towels to its production lineup. In 1999, the mill underwent a major upgrade in its tissue machine technology to a proprietary Kimberly-Clark process.

In 2001, a major expansion at the facility doubled production capacity and added an on-site distribution center. The distribution center has

helped Kimberly-Clark streamline its supply chain. Four years later, the mill added the first-of-its-kind proprietary process to manufacture Viva paper towels. Kimberly-Clark is proud to be part of the Jenks and Tulsa communities, where its high-performing teams manufacture and deliver the best tissue products in the world. For more information on Kimberly-Clark, visit kimberly-clark.com.



Baker Hughes

Bringing Innovation, Careers to Tulsa

Baker Hughes' deep ties to Oklahoma extend beyond its facilities in Tulsa, Claremore, Broken Arrow, Sand Springs, and Barnsdall. As a leading supplier of oilfield services, products, technologies, and systems to the worldwide oil and gas industry, Baker Hughes recognizes that its success in Oklahoma and throughout the world depends on dedicated, talented people. Baker Hughes employs more than 58,000 people in more than 80 countries.

Operating in the Tulsa area since the 1930s, Baker Hughes employs about 2,000 people in the company's facilities in Oklahoma. More than 200 people at the 137,000-square-foot artificial lift plant in Tulsa manufacture, test, and repair downhole artificial lift and surface equipment such as electrical submersible pumps (ESPs). Artificial lift systems increase the flow of liquids from the production well. This can require an electrical submersible pump (ESP). In response to the growing demands for artificial lift equipment and products, the Tulsa facility, which serves customers throughout the U. S., is preparing to operate 24/7. With the convenience

of manufacturing and engineering departments in one location at the Tulsa plant, Baker Hughes offers customers fast, reliable solutions. Baker Hughes is the only ESP system provider that designs and manufactures the complete ESP system, including surface control systems and power cables, as well as the submersible pump, motor, and seal.

While the Broken Arrow plant manufactures completions safety systems, the Sand Springs and Barnsdall plants manufacture oilfield chemicals, and the Claremore plant, like the Tulsa plant, manufactures and tests artificial lift systems, including ESPs.

Currently, the Baker Hughes facility in Claremore is undergoing a \$36 million expansion to build a research and development center. At the one-of-a-kind artificial lift testing facility and worldwide distribution center, Baker Hughes' research and development engineers have the capability to simulate a variety of downhole conditions, including high temperatures and pressures.

Baker Hughes also operates a testing facility near Tulsa, where small-scale simulator testing of downhole tools takes place.

To promote diversity and inclusion, Baker Hughes' Tulsa area facilities have active Women's Resource Groups. Men and women from the group promote employee development and have organized community service and networking events, giving them the opportunity to support community endeavors and to take on leadership roles. Some of the community functions the group has participated in include the Oklahoma State University Women's Business Leadership Seminar, Susan G. Komen Race for the Cure, the Tulsa Baker Hughes Family and Children Services Holiday Toy Drive, and work with Tulsa schools.

As a participant in the Oklahoma Quality Jobs Program, Baker Hughes is committed to fostering job growth. Baker Hughes' long-term investment in major manufacturing plants allows those from Tulsa's skilled workforce to reach global markets from Baker Hughes' operations right here in Oklahoma.

For more information on Baker Hughes' history, visit bakerhughes.com



IC Bus / Navistar



IC Bus, a subsidiary of Navistar, is the nation's largest integrated manufacturer of school buses. Building on more than 100 years of transportation expertise, Navistar continues to be the global leader in passenger protection, chassis design, engines and ergonomics.

Since commencing manufacturing operations in the Tulsa community in 2001, the facility has been a key factor in IC Bus' increased market share from

a distant third place, to number one, capturing over 50 percent of the available market in North America school buses. For the past 10 years, IC Bus has held strong as the number one bus manufacturer and takes pride in transporting 15 million children to school every day.

The Tulsa plant also has a long history of excellence. Originally built in the 1940s, the plant was used to assemble bombers for the Army Air

Corps, specifically B-24 Liberator bombers during World War II. Following the war, the plant continued operations as a military and commercial aircraft maintenance center.

IC Bus takes much pride in this history and has taken many strides forward to transform the mile-long plant into a leading facility. In 2012, the plant added a side assembly line for the company's rear-engine school buses, resulting in an 80 percent improvement in quality. The plant and its roughly 1,200 employees continue to look for ways to simplify and standardize bus operations.

As a result, on June 5, 2012, a decade of hard work was celebrated with a monumental milestone with the completion of the 100,000th bus built in Tulsa.

As the industry leader with high standards in building a better bus, it's important to remember how much is riding on each one. That's why, before a single weld is laid or bolt is torqued, staff is reminded that buses are as much about the moments that go on inside as they are about the sheet metal that goes on the outside. That standard is one of the reasons IC buses are chosen to carry more of this country's precious cargo than any other brand of school bus.



international trade

Tulsa leads the state in international trade with 50 percent of Oklahoma's exports, according to 2011 data from the U.S. Department of Commerce, Office of Trade and Industry. That is two and one-fourth times the next largest Oklahoma export area, Oklahoma City. This reflects Tulsa's natural advantage of a high concentration of manufacturers, a history of international activity and connections that stem from our early entry into the oil industry, and the presence of an ocean-access port, the Tulsa Port of Catoosa at the head of the 445 mile-long McClellan-Kerr Arkansas River



Dr. Cheryl Matherly, Vice Provost for Global Education, Dr. Daniel T. C. Liao, Director General of Taipei Economic and Cultural Office in Houston, Dr. Roger Blais, Provost and Vice-President for Academic Affairs, and Dr. Stephen Hwang, Co-Chair of Kaohsiung-Tulsa Sister City Partnership during a Tulsa meeting in the Fall of 2012.

Navigation System.

The recent economic recession had a negative effect on Oklahoma exports, but the more current trend is positive. For the year 2011, exports were up 15-percent in the state over 2010, according to the Oklahoma Department of Commerce. The most recent metropolitan Tulsa data shows similar growth.

Tulsa's major exports are in manufacturing of machinery, transportation equipment, as well as electrical equipment, appliances, and components. These line up well with the state's major export industries: aircraft and spacecraft components; liquid pumps, machinery parts and components, and pork.

Overall, Oklahoma's top five international customers, in order, are Canada, Mexico, Japan, China, and Singapore. However, the fastest-growing Oklahoma export markets among our top 25 export targets in 2011 were Saudi Arabia (up 106%), South Korea (up 52%), and China (up 51%). Success in such diverse markets is a positive signal for the future.

The range of Tulsa firms and organizations engaged in international business is quite broad, across both industries and firm size. NORDAM is a major Tulsa firm in the aerospace industry with extensive international operations and experience. The firm boasts nine aerospace manufacturing and repair facilities across the Americas, Europe, and Asia. The company delivers high-quality goods and services to private aircraft owners, the military, and the world's airlines, including those in the U. S., Brazil, China, France, India, Morocco, Russia, the United Kingdom, and others. High-profile NORDAM clients include aviation industry giants such as U.S.-based Boeing, Brazil's EMBRAER, Europe's Airbus Industries and Dassault, and Pratt & Whitney of Canada.

TMA Systems, LLC, a Tulsa-based supplier of software and business solutions, moved quickly into international markets exporting its maintenance management software through selected international business partners, adding to the more than 1,400 clients worldwide. According to Greg Dorholt, Director of International Business Development at TMA, "We are committed to expanding TMA's reach in the international marketplace. Through the discovery and cultivation of trusted partners that are already ingrained in the local markets, exporting a solution, such as software, allows TMA to service our clients at the highest level at all times." TMA software is used across most of the world in both developed and developing countries. Their clients include the American Hospital Dubai, the New Zealand Corrections System, and the Greek Parliament.

Our city is a major exporter of education through the international students and dependents that come to Tulsa for both undergraduate and

graduate education. According to the Institute for International Education in Washington, D.C. during the academic year 2010-2011, Oklahoma hosted 8,626 international students who, along with their dependents, brought over \$189.1 million into the state, making us around the middle among the 50 states. Area schools that have relatively high international student enrollments include The University of Tulsa, Oral Roberts University, Tulsa Community College, Northeastern Oklahoma University, and Oklahoma State University.

The University of Tulsa currently has 1,037 international students from 68 countries. Heavily represented countries include China, Saudi Arabia, India, Angola, Kazakhstan, and Malaysia. The direct annual economic impact of these 1,037 students is roughly \$22.7 million and, including an economic multiplier effect, the impact is approximately \$55 million per year.

The global market offers Tulsa firms opportunities to expand sales of both goods and services. The U. S. Department of Commerce has a Tulsa office staffed with excellent counselors who can do one-to-one consulting. They provide workshops and have online data available. The Tulsa City-County Library also provides two international market research databases.

The Center for Executive and Professional Development in TU's Collins College of Business and Tulsa Global Alliance (TGA) co-sponsor an International Business series with recent programs focused on: Entering International Business; The Asia-Pacific Cooperation; and the Brazil, Argentina and the Mercosur Trade area along with business opportunities with Tulsa's Sister Cities, Canada, and Asia-Pacific countries. Future seminars will deal with Japan, the Middle East, Australia, and Germany. TGA also provides cultural information and networking opportunities with individuals and firms in Tulsa's eight Sister Cities as well as U.S. State Department international visitors. ◆

Tulsa Global Alliance

In 2012 we watched proudly as athletes from the U.S. competed in the Summer Olympics. One of the most thrilling moments was watching the parade of international athletes during the opening ceremonies.

In Tulsa, we have our own parade throughout the year...a parade of international visitors.

Tulsa Global Alliance (TGA) is dedicated to increasing global understanding and linking people and institutions worldwide. To achieve its mission, TGA not only hosts international visitors, but also facilitates Sister City activities, promotes global education and economic development, collaborates with international organizations, and serves as a resource for area governments, businesses, educational institutions, organizations, and residents.

Bringing the world to individual Tulsans and exposing what Tulsa has to offer to the rest of the world goes to the heart of the mission of TGA.

International Visitors

Let the parade begin!

TGA hosted more than 190 guests in the past year through the International Visitor Leadership and Youth Ambassador Programs, funded by the U.S. Department of State's Bureau of Educational and Cultural Affairs, Community Connections, funded by USAID, and Open World, funded by the Library of Congress. These international visitors from 63 countries occupied more than 800 hotel room nights, had meetings with more than 175 professionals in various industries, and accounted for more than 60 visits to cultural entities such as Gilcrease Museum and the Tulsa Zoo, providing a local economic impact of more than \$760,000 in the past year. In addition, hundreds of Tulsa area families provided thousands of homestay nights, dinners, transportation services, and a personal view of our community.

Sister Cities

Tulsa's 8 "rings" of international understanding and hope.

There were even greater opportunities for cultural exchanges in the past year through Tulsa's Sister Cities programs. TGA is a member of Sister Cities International, a citizen diplomacy network that connects cities around the world, and TGA has been officially designated by the City of Tulsa as the coordinator for all the Tulsa's Sister Cities relationships. Tulsa currently has eight Sister Cities: San Luis Potosi, Mexico, since 1980; Kaohsiung, Taiwan, since 1980; Beihai, China, since 1987; Tiberias, Israel, since 1989; Utsunomiya, Japan, since 1992; Zelenograd, Russia, since 1992; Celle,



Dr. Debbie Landry, Northeastern State University Dean of Education, and faculty member, Yungfei Kao, with NSU students and city education officials in front of transformer statue at Pier 2, Arts District, Kaohsiung, Taiwan.

Germany, since 2000, and Amiens, France, since 2005. These Sister City partnerships hosted 77 visitors, who had 51 professional appointments, 97 visits to cultural entities and 813 homestay nights.

Three of our Sister Cities celebrated anniversaries in the past year. Tulsa has been international partners with Utsunomiya, Japan and Zelenograd, Russia for 20 years and with Beihai, China for 25 years!

International Business Seminars

Games to some, but just good business for others.

TGA hosts several seminars each year that help establish an even playing field by focusing on specific international business-related topics such as joint ventures, imports, exports, currency issues, protocol, legal and regulatory issues, culture, business ethics, and human resource development. This goes a long way to foster understanding and increase the economic potential of Tulsa-area industries. Past events have included learning about "Doing Business with Brazil, Argentina and the Mercosur Area", with Keynote Speaker, Lorrie Fussell, US Department of Commerce Brazil Desk Officer, and panelists, Carlos Romero, Helmerich & Payne, Rafael Quintero, McElroy Manufacturing, and John Morrow, TD Williamson and "Breaking the Barriers, Six Steps to Going Global" featuring Jonathan Neff, the Oklahoma Governor's International Team, Mike Howard, CFO, Webco, Rocky Moore, Vice President of Finance, BAMA Foods, Gary Ferrell, President, Bonavista Technologies and Bill Solomon, President, Vacuworx.

Educational Programs

Children learn very early on how to play well with others...at least that's a goal at TGA!

Every other year, Kids' World International Festival provides a hands-on exploration of world

cultures to more than 8,000 schoolchildren and thousands more teachers and families. More than 35 cultures open our children's minds through food, music, entertainment, customs, language, art, and geography.

The Culture Box Program offers collections of artifacts from more than 40 countries. Coordinated by Emily Wood and Eisenhower International School, these little worlds-in-a-box are checked out by teachers, scout leaders and civic groups to use as a hands-on tool to learn more about our global neighbors.

TGA has established the Tucky Roger Education Fellowship, a grant supporting professional development in the area of global education for pre K-12 teachers and educators.

Since 1993, more than 125,000 students, teachers and families have enjoyed the benefits of these programs, provided in an effort to encourage respect and appreciation of all cultures.

In 2012, The University of Tulsa Center for Global Education, Tulsa Community College, Tulsa Global Alliance and U.N. Association of Eastern Oklahoma presented the "Summit on Citizen Diplomacy—Oklahoma and the World: Educating the Next Generation of Citizen Diplomats." The summit engaged 100+ students and educational professionals with discussions around the concept of citizen diplomacy and highlighted community institutions that are engaged with global issues.

In addition, many of our international visitors stop in classrooms throughout the year where the learning and understanding is a true exchange between the students and the visitors.

TGA members can meet international visitors at its events, like the new Toast the Travelers bi-monthly event that offers members a happy-hour chance to 'raise a global glass' with visitors. Members can get up close and personal by hosting guests in their home for dinner or overnight stays. One thing for sure, TGA Members are not bench-warmers, they are active participants in this international arena that breaks down the borders, opens family members of all ages up to experiencing different cultures in comfortable surroundings, and creates lasting friendships.

TGA cannot operate without the assistance of its members, donors, corporate sponsors, local supporters, and hundreds of volunteers—all citizen diplomats—who give countless hours of their time to help spread TGA's mission. Be part of the team that interacts with people of different cultures through awareness, education, and opportunities by becoming a citizen diplomat. Visit TGA online at tulsaglobalalliance.org.

environmental management

One of the key buzzwords in environmental management these days is sustainability. This word is defined in many ways, usually something along the lines of, “a quality of life that leads to an equally good quality of life for future generations.” A more direct definition of sustainability is “the capacity to endure.” It encompasses sustainable ecology as well as a sustainable economy. The decisions that a city, region, or planet make for environmental reasons must also take into account the level of funding that the citizens will commit to in order for the capacity to endure.

Sustainability for a city is more perfectly defined as “the long-term maintenance of responsibility.” Whether the responsibility is to deliver clean water, pick up the trash, or offer green space for the health of the citizenry. Local governments struggle to find the appropriate level of funding to accomplish their responsibilities. If a city grows too fast, the cost of putting in new waterlines and sewers can overwhelm the budget that doesn’t start billing the homes for water service until complete. If a city budget is lowered due to an economic recession, often the first things cut are quality of life issues such as mowing right-of-ways or parks.

In 2012, the City of Tulsa made many changes that will affect what people perceive as environmentally significant. Tulsa brought on a new comprehensive recycling program for all its residents. It also changed the treatment of city-provided tap water and opened the first in the state city-owned public CNG station. The city’s efforts were also complemented by millions in private dollars in improvements to the River Parks and infill housing in the city core.

The City of Tulsa changes to the trash and recycling collection had probably the most impact on the residents of Tulsa in 2012. Tulsa had contracted with a local consortium of haulers to offer twice-a-week collection of unlimited household refuse for more than 30 years. Residents wanting to recycle had to contact the city and subscribe to an every

other week collection of recyclables at a cost another \$2 a month. Because of the difficulty to subscribe, the infrequency of pick-up, and the additional cost, most households did not recycle. Less than 16,000 of the 116,000 single-family households agreed to pay the extra two dollars to get a green recycling bin. A slightly smaller amount of people recycled through the free drop-off recycling centers that combined to show that only about 20 percent of the households in Tulsa regularly recycled in 2011.

The City of Tulsa, through its trash group known as Tulsa Authority for Recovery of Energy (TARE), planned for three years on how to offer Tulsans better trash and recycling options when the trash contract expired in July of 2012. Bid documents were opened in March and a local hauling company and local materials processor chosen for implementation that began on October 1.

The city received good bids and was able to keep prices low, resulting in a new rate only eight cents per month per house more than was previously charged. There was a new fleet of CNG-powered trucks, new uniforms for trash workers, new carts for the residents, and four times the recycling collection as before. The move to more recycling proved to be the right decision.

Tulsans were skeptical about changes to drinking water. Tulsa has great water provided by a combination of water from Spavinaw, Eucha, and Oologah lakes. It also has contracts to obtain raw water from Lake Hudson. These different watersheds are abundant, and the City of Tulsa has built and paid for waterlines as large as 72 inches in diameter. There are also two storage lakes in the city limits with another 2.1 billion gallons of raw water. Water capacity is wonderful for the 500,000 people in the city limits and select suburban areas that contract with the city to provide drinking water. The two water treatment plants also have great capacity, with the Mohawk plant capacity of treating 100 million gallons and the A.B. Jewell plant with a capacity of 120 million gallons a day. This capacity

is almost double the average daily usage of 114 million gallons a day and well above the 183 million gallons per day average for the highest usage month of July. The city has not had to enforce any water rationing since 1981.

The water in Tulsa is not only abundant and plentiful, but also very clean and healthy. While many urban water providers have trouble complying with stringent limits because of fertilizers, erosion and corrosion in household plumbing pipes, Tulsa was below all the regulatory limits once again and met all the state and federal rules. To achieve this status, Tulsa has its own laboratory and collects more than 5,000 samples per year for testing. Water is a living thing and failure to complete disinfection can lead to harmful bacteria.

In July of 2012, the City of Tulsa began using chloramine for secondary water disinfection. Chloramine is made with small amounts of ammonia mixed with chlorine. Chlorine alone was used previously and while the primary disinfection is still chlorine, that alone can produce harmful trihalomethanes. The addition of chloramine should help reduce some of the reaction problems caused by water disinfection. This move was scary to some who worry about changes to any government-provided service like water. The addition of chloramine meant that ordinary tap water could be harmful to fish in aquariums and backyard ponds.

Tulsa officials did not take this step lightly or in a vacuum. Again, the city held scores of public meetings to receive input from the citizens and residents were educated by a combination of direct mailings and extensive media coverage. Concerns were addressed and opinions heard. The change was controversial, but the commitment to protecting Tulsa water for its citizens was not. Almost half of American households will use chloramine in the next three years and it is in use in many of the port cities in the country. Cities using chloramine include Boston, Seattle, and San Francisco.

The least controversial environmental advance in the City of Tulsa in 2012 was a change in how the city powers much of its fleet. This was mostly because of local knowledge in fuels with one out of six workers in the State of Oklahoma working in the energy field. On September 8th the City of Tulsa opened its first publicly accessible, city-owned compressed natural gas (CNG) station. The city already had six other CNG fueling stations; three owned by the gas utility company and three other privately owned stations, this commitment by local government to use a cleaner fuel was welcomed by all. The demand for CNG stations is growing and the city has made a commitment to alternative fuels for many compelling reasons. One, converting to natural gas is good for Oklahoma's economy with the state being the third largest producer in the nation. Secondly, it is a domestic product that reduces our dependence on foreign oil. Third and probably most important is that it burns cleaner to help keep Tulsa air clean.

The City of Tulsa is beginning conversion of many of the heavy equipment (like dump trucks and street sweepers) to CNG and added bid requirements in the new trash and recycling hauling contracts to require successful bidders to have a CNG fleet. The decision to convert just those trucks was equivalent

in cleaner air to taking 373 vehicles off the road a day. Tulsa Transit has also been purchasing CNG powered public busses with now almost half of their fleet of 63 busses using compressed natural gas.

The decision to convert to CNG fuels for heavy equipment is also a good economic choice. In 2012, the average CNG price equivalent to diesel was \$1.50 a gallon for CNG compared to a \$3.70 a gallon for diesel. Oklahoma and Washington D.C. have also helped with generous tax incentives that have led to four other regional CNG stations coming online in 2012.

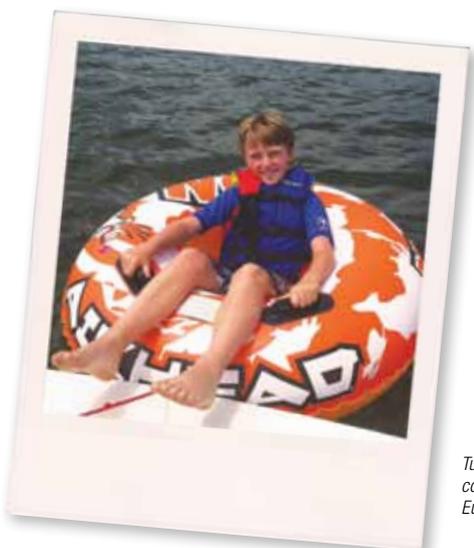
Tulsa is continually trying to improve the airshed and CNG is a positive step. Tulsa stayed off the dirty air list again, while other cities in the region stayed on. The communities of Dallas, Houston, Kansas City, and Denver are the cities that Tulsa competes with for jobs and their air exceeds ozone limits. Tulsa's air can exceed limits during certain hot, windless days but has improved 10 of the last 12 years. Air quality is a challenge for any urban area and the decision to embrace CNG is a sustainable one for Tulsa.

Another positive environmental event in Tulsa during 2012 was the two announcements of funding from private donors to support the health of Tulsa residents. Both of these gifts came from a long-time philanthropist group the George Kaiser Family Foundation. The first was a plan for a new gathering place along the Arkansas River in the heart of Tulsa. This foundation had already funded \$12.4 million running and bike paths along both banks of the river as well as dozens of other public efforts. In 2012 they hired a top architect to present ideas, and those were shared with the public for input. Hundreds of Tulsans attended these meetings and gave comments to the staff of their desires for such a park. The ideas will be finalized just after the first of the year and construction should begin on the \$100 million project in early 2014.

An equally impressive gift to Tulsa from the George Kaiser Family Foundation was a \$36 million housing and retail makeover of a blighted area near the University of Tulsa. The project consists of 128 mixed-income housing units, 20 student-housing units, 7,000 feet of retail space and renovation of a neighborhood park. The area will help provide affordable housing with an early childhood education center, an elementary school and a university. The City of Tulsa provided almost \$6 million in water, sewer and storm water improvements. The improved density will also help with mass transit and related city functions while providing economic stability and sustainability to the area. The work is almost complete with move-in scheduled for early spring of 2013. Together the two projects will make Tulsans healthier and restore vitality to part of the inner-city.

2012 in Tulsa will be remembered as a progressive time for the sustainability movement. The new recycling efforts had a big impact on people's habits and were seen as a great new service by the city. The drinking water changes were unnoticed by most, but protecting the public health is probably done best without fanfare. Converting large chunks of city-owned heavy equipment to CNG fuel will help protect our air and should financially pay off very quickly. The largest of the highlighted projects mentioned above are still under construction and design but will probably have the biggest impact on Tulsans' lives.

The definitions of sustainability all talk about quality of life, the importance of capacity to endure, and the long-term maintenance of responsibility. The year 2012 in Tulsa showed great advances in a wide variety of ways. Changing habits and investment in our community is the most sustainable thing we can do. Recycling, safer water, cleaner fuels, public green space, and affordable housing are the right decisions for future generations of Tulsans. ♦



Tulsa has great water provided by a combination of water from Spavinaw, Eucha, and Oologah lakes.

commercial real estate

Office

The Tulsa office market in 2012 has shown improvement over 2011 in multiple areas, and moderate positive absorption has been achieved for the first time since year-end 2010. Strong leasing activity in the Central Business District (CBD), Midtown, and North Central submarkets have largely contributed to this positive change. While there are still major national economic concerns and uncertainties, the Tulsa market has responded strongly over the past six months, and most signs point to continued improvement in many areas.

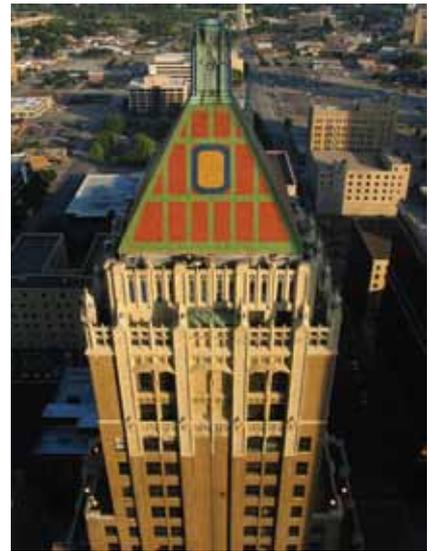
The CBD submarket saw the most significant positive change in occupancy due to the expansion of several tenants in the Bank of Oklahoma Tower and strong leasing activity at 110 West 7th Street and the Sun Building. With the One Place development moving ahead and numerous projects impacting the Blue Dome and Brady Arts Districts, Downtown Tulsa has emerged once again as a strong candidate for tenants' consideration. Additional movement by tenants from one building to another in an effort to expand or upgrade their office space also allowed for additional absorption of space even though a few large tenants downsized earlier this year.

Of the remaining submarkets, Midtown experienced positive absorption in the amount of 46,094 square feet primarily due to tenant expansion and additional leasing activity at Boulder Towers. The South Central submarket saw minimal absorption with most of the activity being along South Lewis in the BOK Place at Southern Hills and IBC Tower as well as Warren Place on South Yale. North Central added two buildings to its midyear inventory with the inclusion of Dollar Thrifty Automotive Group's West Tower and Reservations Center, totaling 159,480 square feet with a vacancy of 28,403 additional square feet in this submarket. The East and Northeast submarkets experienced negative absorption with several companies downsizing their office space needs.

Rental rates continued to only fluctuate slightly in each submarket but continued to rise slowly with a weighted average asking rate of \$14.22 per square foot compared to \$13.87 per square foot at year end 2011 and at \$13.85 per square foot midyear 2011. The largest increase in lease rates was found in the South Central submarket with rates up almost a dollar from midyear 2011 (\$15.00 to \$15.95 per square foot).

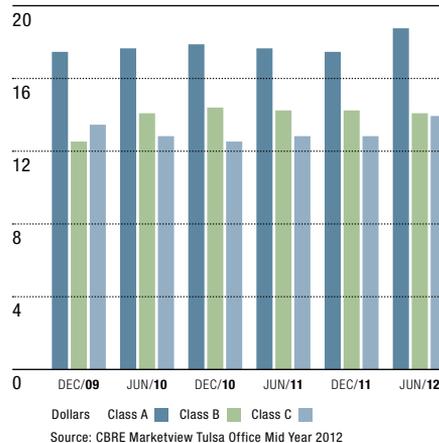
There were two office sales in excess of 20,000 square feet in the first half of 2012. The Aerial Data Service Building on East 51st Street was purchased as an investment in January for \$37.39 per square foot. 16 Centre Plaza located on East 16th Street was sold to GRDA for \$56.47 per square foot. Construction of multi-tenant office space continued to occur for medical space, but no new speculative construction appears to be on the horizon, except for American Bank & Trust building and One Place Development, which are both currently under construction.

Overall, the Tulsa office market took positive steps through year-end. Volatility in the stock market, concerns regarding unemployment, and new

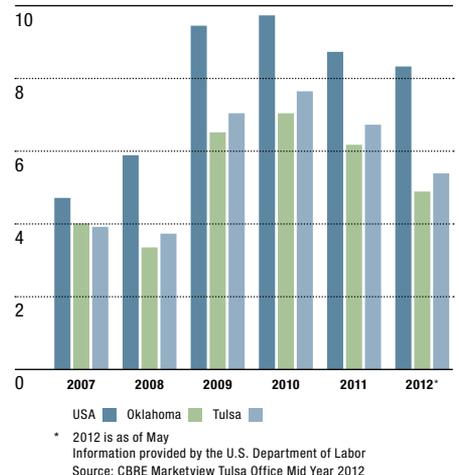


"Queen of the Tulsa Skyline" the Philtower (1927) 427 S. Boston, was the tallest building in Oklahoma when completed. Owner Waite Phillips, financier and philanthropist, donated the building to the Boy Scouts to endow a Ranch in New Mexico. Monogrammed doorknobs, brass elevator doors, travertine marble floors, and a 25-foot-high vaulted ceiling with interlocking tracery adorn the lobby. The polychromed red and green tile roof still stands as a Tulsa landmark.

LEASE RATES Overall



UNEMPLOYMENT RATE Percent



health care legislation will most likely continue to make headlines both locally and nationally for some time and may affect this positive outlook, but Tulsa will see less impact than our coastal and large city counterparts

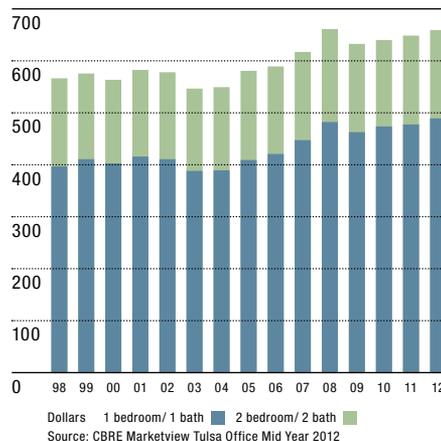
Retail

The Tulsa metro area retail vacancy continued to trend up as the market experienced a 7% increase in vacancy over this same time last year. The average vacancy rate of 13.80% in midyear 2012 compares to 12.11% in midyear 2011. Although the survey reflected eight quarters of increased vacancy, it was below that of the high of 15.09% recorded in June 2009. Rates appear to be stabilizing, but are expected to remain above pre-recession levels for the next 18 to 24 months. Although there has not been the crushing loss of big box retailers experienced during the recession, in the first half of 2012 smaller unanchored centers showed a continued deterioration of occupancy with vacancy at 19.71%.

Lease rates continued to decline, with the average being \$10.42 per square foot, the lowest since December 2007 when the average was \$9.16 per square foot. In contrast to overall average rates, Class A increased slightly to an average of \$15.23 per square foot. This variation can be explained by the continuation of national and regional tenants "flight to quality." Tenant demand for prime space remained strong with prime space being in short supply.

One submarket emerging in all this activity is the Central Business District (CBD) as cranes can be seen throughout downtown Tulsa. Restaurants are now asking about the options available to them in the CBD. The increase in residential development is the primary driving force as well as locations that meet the basic fundamentals such as signage, visibility, parking, and residential/daytime density.

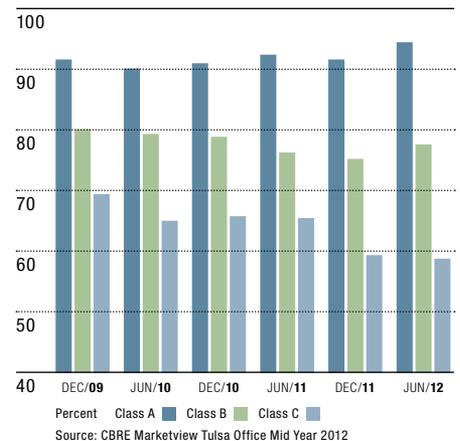
TULSA APARTMENT MARKET Average Rental Rates



Major retailers such as Sports Authority, Blockbuster, and Homeland announced closures in the market. The better-located vacancies are quickly being absorbed by other retail uses. Some landlords continued to turn to redevelopment as an option to avoid further deterioration of occupancy. Outdated site plans, signage, and tower heights can be overhauled if the location warrants the investment. Renovations that address retailer fundamentals are likely to yield positive results and restore former net operating income levels. In most instances more than a facelift is necessary.

One noteworthy change in the market was the influx of new fresh and organic grocery stores, begging the question of what the market will ultimately support and what the impact will be on existing grocery stores. With the announcement by Sprouts to open two new stores, the recent opening of Fresh Market at 81st and Yale, a Reasor's recent opening in Sand Springs and one in Bixby, grocery square footage will increase dramatically. In addition, more retailers such as QuikTrip, Dollar Tree, and Dollar General are increasing their grocery inventory footprint.

OCCUPANCY RATES Overall



Large fitness operations have also had a dramatic impact on the Tulsa market. Lifetime Fitness, a new 115,000-square-foot, freestanding fitness center at 106th and South Memorial, opened this year with a full-sized pool, two stories of equipment, and childcare. Planet Fitness has signed a lease to take a portion of the former Walmart space at 91st and South Memorial and opened in late 2012. Sky Fitness leased 40,000 square feet in the former Mervyn's at the Promenade Mall at 41st and Yale at the end of 2011.

Primarily, two types of retail investment buyers appear to be in the market. The well-established, long-term hold buyers are purchasing what they consider to be Class A property with low risk. These well-established landlords, nationally and locally, continue to add to their portfolios.

According to Real Capital Analytics, cap rates continue to trend lower as REITs, institutions, equity funds, and foreign buyers are competing for top assets. The total U.S. average rate is posted at a

CONTINUED ON PAGE 76

7.3% cap rate; however, this rate is representative of the product that is selling and does not take into account strip and unanchored retail centers that continue to linger on the market.

The second prevalent group of buyers searching in the market are focused on value add purchases. There appears to be a significant amount of capital searching for troubled properties that can be purchased at very low numbers and redeveloped or re-tenanted. These types of transactions have not yet materialized to the extent expected in the Tulsa or overall U.S. market, with few sales since the beginning of the recession. This is likely due to both a continuation of the common notion of “pray and delay,” as well as lending institutions’ scrutiny of loans on troubled retail properties. Sellers and financial institutions are not yet ready to discount property in the way that meets the needs of value add buyers. Modifications and restructuring continue to be commonplace. Workouts have now exceeded new distress inflows, according to Real Capital Analytics.

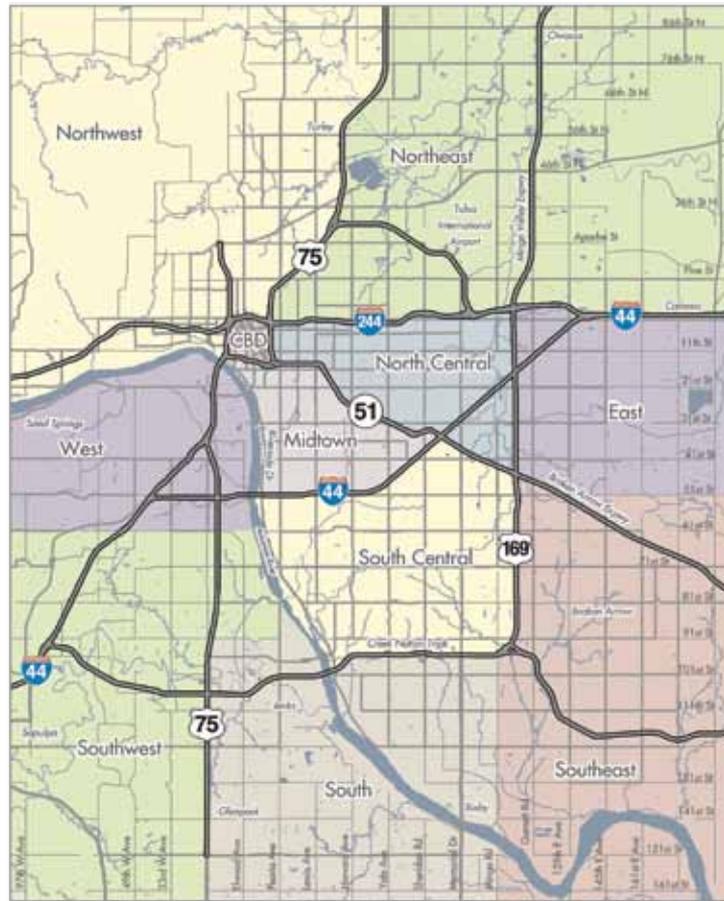
Bolstered by increases in retailer exposure on the web and increasing amounts of online promotions, year-over-year growth of e-commerce sales have grown between 14% and 18% each quarter since the holiday shopping season of 2009. The growth of e-commerce prior to and following the recession has well surpassed the growth of other segments.

Retailers have always had to change and modify their concepts and strategies in order to fit the current trends and economic market. Many retailers and restaurants are beginning to shrink their formats. What began as a big box/power center retailer change is now being done by other retailers as well. Best Buy has announced they plan to open 100 smaller format stores by 2013.

Tulsa Apartment Survey

Both Tulsa and the State of Oklahoma have a positive economic story to tell right now. As reported by the Oklahoma Employment Security Commission, statewide unemployment for May is listed at 4.8%, with seasonally adjusted statewide employment reaching an all time high. Tulsa is performing equally well, with early year unemployment coming in at 4.9%. Also, according to the Bureau of Labor Statistics, Tulsa ranked

Submarket Map



second among the nation's core 100 markets with an annual employment expansion rate of 4.1% through the end of the first quarter of 2012.

For the first six months of 2012, Tulsa's rental rates increased at almost double the rate they did a year ago—2.1% versus 1.2%. This increase in rental rates is exhibited by fewer specials or rent concessions and just plain higher monthly rates. We also estimated that only about one-third of the properties surveyed were running some type of special. When compared to our midyear 2011 survey, overall rates are up 1.5% (rents dropped some last fall then subsequently increased after the beginning of 2012).

Specific rental rate highlights include:

- One bedroom units averaged \$488/month – \$11 more than one year ago.
- Two bedroom, one bath units averaged \$611/month – \$5 more than one year ago.
- Two bedroom, two bath units averaged \$654/month – \$10 more than one year ago.

The South Tulsa submarket posterized the other three submarkets with its year-over-year rent increase of 6%. The majority of the properties within the South Tulsa survey fall into the B category.

Today, the average Tulsa occupancy is 92.5%. In June of 2011, this survey showed the average occupancy of Tulsa apartments to be 91.5%. At the end of 2011, this survey quoted an average occupancy that was also 91.5% for the same areas. Broken Arrow and Central Tulsa submarkets have the highest average occupancies at 96% and 95% respectively. The lowest average occupancy is in East Tulsa at 91%. Occupancy in the South Tulsa submarket is 92%. Average occupancy of 11 properties surveyed on the separate Class “A” Suburban Apartment Survey is 91.5%.

The occupancies shown in the Central and Broken Arrow submarkets at 95% and 96% respectively are very strong indeed. It should be noted that the properties surveyed in the Broken Arrow submarket do not include the most recent new construction

but rather includes the older properties, which have always been included in the survey.

Highest investor demand for multi-family assets still appears to be focused on Class A properties with distressed assets being also in strong demand. The sale of the Sonoma Grande Apartments (336 units) in May at \$95,833/unit set a new high for A class suburban apartments in Tulsa.

During 2012, we observed ten sales of properties over 50 units in size. Of those ten sales, six were directly related to distress and/or lender activity. The average per unit sale price of the ten sales was \$37,109 per unit.

A total of three suburban apartment communities were completed in 2012. Also, two previously existing suburban properties are adding units as additional phases. These five suburban complexes will add 1,049 units to the Tulsa rental inventory.

During the recession and immediately post-recession, the Tulsa apartment market became an example of have's and have not's. Occupancies and rents softened and the market found its bottom in 2009. There were some large disparities in performance among individual properties. Some properties performed just fine while others suffered. A small amount of that "have and have not" performance still exists; it's just not nearly as widespread as it once was as the overall apartment market continues to improve.

The investment sales market also exhibits disparities in demand with highest buyer demand focused on A class assets and also on distressed assets. Buyer demand, and therefore pricing expectations, falls off quite a bit outside these two categories. With ten sales over 50 units in size completed in the first half of 2012, not to mention a new pricing record high, the investment sales market is well on its way towards outpacing the "new normal" post-recession annual average number of sales between 12 to 15 per year.

With an April stated unemployment rate of 4.9% and such a strong start to the year, the second half of 2012 saw continued improvement. Improved annual rents were predicted to increase by 4.2%. The highest overall year over year increase in rents we have recorded in 24 years of this survey is 6.5%.

To borrow from Oklahoman Garth Brooks, "And the thunder rolls...."

Industrial

Tulsa's 60 million-square-foot industrial market continued to improve in the first half of 2012. The overall vacancy rate decreased to 12.06%, increasing rental rates and sales prices. The market has seen improvement in the energy and aerospace sectors, which drives a significant portion of Tulsa's industrial base. Manufacturing employment has rebounded with 8,500 new jobs spurring increases in new orders, production, and inventories. The Tulsa MSA has grown to a population of 950,000 with a GDP of \$41B, representing 31% of the Oklahoma economy. The strength of our economic base is dependent on increases in income and job growth. Tulsa's unemployment rate continued to decrease from 6.6% to 5.3% in 2012. Tulsa lags behind the Oklahoma unemployment rate of 4.8%, but is favorable compared to the 8.2% average for the U.S. Tulsa's job growth was projected to increase by 2.2% in 2012, with a 5.5% increase in personal income. The potential loss of jobs from the American Airlines bankruptcy has the community bracing for bad news at the nation's largest MRO base and area's largest employer.

The industrial market had 90,084 square feet of positive net absorption in the first half of 2012, which has decreased the overall vacancy rate 0.19% to 12.06%. Positive net absorption is great news after a negative 1.2 MSF in 2011, negative 1.3 MSF in 2010 and negative 2.7 MSF in 2009. We are currently tracking over 2.2 MSF of space requirements in the marketplace from 23 companies. This demand reflects a potential two-year supply of existing inventory when obsolete space is factored in. The positive net absorption in the first half of the year, combined with the demand for space and limited speculative new construction, indicated good potential for the market to stabilize to positive growth in 2012.

Tulsa has seven build-to-suit projects under construction totaling 484,000 SF. A majority of these buildings are being developed at the 490 acre Greenhill Industrial Park located at US 169 and 46th Street North. This includes a 175,000-square-foot headquarters facility for Clear Edge Filtration, 127,500-square-foot warehouse for American Tire Distributors, and a 50,000-square-foot building for Walvoil. This is positive news for the industrial market as users struggle to find existing product, and they can afford to pay the higher rental rates of new and custom construction. Overall market lease rates increased 5% from \$4.78 per at year-end 2011 to \$5.02 per square feet at midyear 2012. Bulk

warehouse rates have decreased slightly from \$3.90 to \$3.83 per square feet while flex space rates have dropped 2.6% from \$6.61 per square feet to \$6.44 per square feet. Rental rates have increased in all size categories, except buildings ranging from 10,000 to 20,000 square feet and over 100,000 square feet, due to the limited supply of inventory. Rental rates continued to increase throughout 2012 as the existing inventory of industrial buildings was absorbed. Although inventories are decreasing, rent concessions are still common in the market, especially in Class B & C product.

At midyear 2012, Tulsa had several Class A bulk warehouse options comprising 302,000 square feet, down 88,000 square feet from year-end 2011. Kansas City Life Insurance has 45,000 square feet available in Metro Park and 50,000 square feet in Commerce Crossing near East 61st Street & South 129th East Avenue. An additional 120,000 square feet is available at Airpark II and III in the Northeast submarket and 30,000 square feet is vacant at Metro Park East III in the Southeast submarket. Net lease rates for these spaces are quoted at \$4.25 to \$5.50 per square feet. No additional speculative bulk warehouse construction was planned for 2012 or until existing inventories are depleted.

Although the bulk warehouse market is sluggish, the supply of functional crane manufacturing buildings is almost non-existent. Several users are in the market for high-bay crane space with 20'+ hook height, drive-through flow and yard area. A 42,000 square feet speculative crane served building is under construction at the Port of Catoosa and two 24,000 square feet crane-served buildings are planned for the Tulsa Industrial Center in West Tulsa. Strong demand for manufacturing space will continue to drive up rates and prices based on the limited existing supply.

The outlook for Tulsa's industrial market for 2012 was positive. Rental rates and sales prices continued to increase as existing inventory was absorbed. Increases in job growth in the energy and aerospace industries contributed to the recovery to prerecession levels. Manufacturing demand spurred additional build-to-suit projects in the market. Tulsa's industrial market rebounded in 2012 and a return to historical low vacancy and high absorption levels is expected in the next several years. ♦

workforce development

The Tulsa area economy has fared much better than the majority of the U.S. during the latest economic downturn, and consequently, has a robust job market. In fact, in October 2012, Area Development wrote that their survey of site location consultants ranked Oklahoma 10th overall among the Top States for Doing Business. Additionally, "Oklahoma ranked fifth for both its incentive programs and as a leader in workforce development programs, and it also tied for fifth as one of the states leading in the economic recovery." Additionally, from September 2011

TULSA MSA LABOR FORCE

YEAR	LABOR FORCE	UNEMPLOYMENT RATE %
1994	406,564	5.8
1995	404,599	4.4
1996	410,907	3.6
1997	424,719	3.7
1998	437,861	3.6
1999	440,891	3.5
2000	440,316	2.9
2001	443,289	3.4
2002	445,751	5.0
2003	442,721	6.1
2004	438,072	5.1
2005	443,384	4.4
2006	444,664	4.0
2007	440,814	4.0
2008	440,129	3.7
2009	441,049	7.1
2010	441,719	7.7
2011	437,231	6.9
2012	441,667	5.8

2012 data based on the first nine months of the year.
Sources: U.S. Bureau of Labor Statistics; Research Wizard, Tulsa City-County Library.

TULSA METROPOLITAN STATISTICAL AREA INDUSTRY RANKING BY PAYROLL 2013

Professional & Business Services	\$ 2,731,783	17.9%
Education & Health Services	\$ 2,514,919	16.5%
Manufacturing	\$ 2,475,226	16.3%
Transportation & Utilities	\$ 1,240,558	8.2%
Retail Trade	\$ 1,151,052	7.6%
Financial Services	\$ 1,126,322	7.4%
Mining & Natural Resources	\$ 861,315	5.7%
Wholesale Trade	\$ 845,780	5.6%
Construction	\$ 840,457	5.5%
Leisure & Hospitality Services	\$ 566,842	3.7%
Information Services	\$ 471,003	3.1%
Other Services	\$ 295,882	1.9%
Unclassified	\$ 100,001	0.7%
Total	\$ 15,221,140	100.0%

In thousands of dollars.
Source: U.S. Bureau of Labor Statistics, September 2012.

PERCENTAGE OF TOTAL WAGE AND SALARY EMPLOYMENT BY INDUSTRY CATEGORY

CATEGORY	TULSA MSA 2011	TULSA MSA 2012 ¹	USA 2011	USA 2012 ¹
Construction	4.9	4.9	4.2	4.1
Financial Activities	5.4	5.3	5.8	5.8
Government	13.4	13.2	16.8	16.5
Information	2.0	1.9	2.0	2.0
Manufacturing	11.3	12.1	8.9	9.0
Natural Resources & Mining	1.8	1.9	0.6	0.6
Retail Trade	10.9	10.6	11.1	11.1
Services	41.4	41.4	42.5	43.0
Transportation, Warehouse, & Utilities	5.0	5.1	3.7	3.7
Wholesale Trade	3.7	3.7	4.2	4.2

¹ 2012 data is based on the first eight months of the year.
Data series is not seasonally adjusted.
Industries based on the North American Industry Classification System.
Services include Professional & Business, Education & Health Services, Leisure & Hospitality, and Other Services.
Sources: U.S. Bureau of Labor Statistics; Research Wizard, Tulsa City-County Library.

MAJOR PRIVATE COMPANIES HEADQUARTERED IN TULSA MSA

COMPANIES	ESTIMATED SALES
Seminole Energy Services, LLC	2,021,520,000
QuikTrip Corporation	1,404,500,000
Rooney Holdings, Inc.	1,400,000,000
Vanguard Car Rental USA, Inc.	1,170,000,000
McGraw Davisson Stewart, Inc.	800,000,000
Samson Properties, Inc.	651,200,000
T D Williamson, Inc.	485,070,000
Murphy Energy Corporation	412,120,000
Metro Trucking & Reload	282,950,000
The NORDAM Group, Inc.	250,700,000
United States Beef Corporation	241,840,000
A G Equipment Company	237,950,000
Navico, Inc.	229,300,000
DMD, Inc.	224,700,000
Explorer Pipeline Services Company	221,870,000
Kaiser-Francis Oil Company (Gbk Corporation)	205,300,000
Mazzio's Corporation	201,600,000

In dollars.
 Geographical Area: Tulsa Regional Statistical Area.
 Source: Hoovers Online, 2012.
 Compiled by Research Wizard, Tulsa City-County Library.

to September 2012 Oklahoma had the second highest manufacturing employment growth in the nation, according to the U.S. Bureau of Labor Statistics.

During the last economic downturn, the Tulsa metropolitan area's annual unemployment rate went only as high as 6.9 percent (in 2010) as compared to the nation which had an annual unemployment rate of 9.6 percent that same year. In 2012, the metro area unemployment rate



steadily dropped from a high in January of 7.0 percent to its current rate of 5.4 percent.

Though a rate of 5.4 percent represents what economists generally consider "full employment," that rate does not include people who choose not to participate in the workforce for whatever reason and are thus not represented in the unemployment rate. In Oklahoma, the number of people who choose not to participate in the workforce (i.e. not to seek a job) is historically high. Only 57 percent of women in Oklahoma choose to seek employment, which is the 2nd worst participation rate for women in the nation, behind Utah. Only 73 percent of Oklahoma men participate in the workforce. These two numbers combined indicate that there is a large, untapped pool of workers in the Tulsa metro area who could fill open positions within our many growing Tulsa-area companies.

There are many factors that contribute toward Oklahoma's low labor participation rate. According to Deidre Myers, Director of Policy, Research and Economic Analysis at the Oklahoma Department of Commerce, those include our culture, health issues, aging populations, and increased household wealth during the 2000s. But the factor that appears to have the biggest impact is that of a skills mismatch. We have many growing companies with open positions, coupled with workers who choose not to seek jobs, because their skills don't match what companies are seeking.

Those people with skills can find plenty of work in Oklahoma. For those with some college or an Associate's degree, which includes certificate programs from Oklahoma's award-winning vocational-technical centers (CareerTech), a relatively small portion choose not to seek jobs, and the unemployment rate for this group is only 4.3 percent. Those with a Bachelor's Degree or higher have a similarly small percentage who choose not to seek jobs and have a 2.7 percent unemployment

CONTINUED ON PAGE 80

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rate. The low unemployment rates for these groups illustrate the need for more workers with these skills to join the workforce.

Conversely, for those who are high school graduates with no further education, nearly 340,000 choose not to seek jobs, and even with that very substantial number, the unemployment rate for this group is still 5.3 percent. One can only imagine how the unemployment rate would increase if a larger number of these people chose to enter the workforce. Finally, for those without a high school diploma or GED, 143,000 choose not to seek jobs—nearly one-and-one-half times the number who have jobs, and the unemployment rate for this group is still 7.5 percent.

Fortunately the mismatch between our available workforce and the jobs that our area companies are creating can be remedied via education and training. And, as a region, we're addressing the need from an economic development and workforce development perspective. In the Tulsa metro, we operate regionally—in partnership with chambers, economic development professionals, CareerTech, colleges and universities, and countless other agencies and non-profits who share in a targeted effort to put people to work. We have an advantage over other areas because our CareerTech system can create customized training that is industry-driven in order to meet company's needs. On the higher education side, we're fortunate to have the Higher Education Forum of Northeastern Oklahoma, which develops collaborative and innovative strategies to coordinate, integrate, and support the educational pipeline. As an anchor institution consortium, the Forum links high schools to colleges through academic service learning projects, internships, and career exploration as well as facilitates experiential learning opportunities to improve student achievement and develop stronger communities in northeastern Oklahoma.

MAJOR PUBLIC COMPANIES HEADQUARTERED IN TULSA MSA

COMPANY	ESTIMATED SALES
ONEOK, Inc.	14,805,790,000
ONEOK Partners, LP	11,322,610,000
The Williams Companies, Inc.	7,930,000,000
Williams Partners, LP	6,729,000,000
WPX Energy, Inc.	3,988,000,000
Helmerich & Payne, Inc.	2,543,890,000
Alliance Resource Partners, LP	1,843,560,000
Magellan Midstream Partners, LP	1,748,670,000
Dollar Thrifty Automotive Group, Inc.	1,548,930,000
SemGroup Corporation	1,479,510,000
BOK Financial Corporation	1,383,860,000
NGL Energy Partners, LP	1,310,470,000
Unit Corporation	1,208,370,000
Matrix Service Company	739,050,000
Laredo Petroleum Holdings, Inc.	510,270,000
Webco Industries, Inc.	312,600,000
AAON, Inc.	266,220,000
Blueknight Energy Partners, LP	176,710,000
Apco Oil and Gas International, Inc.	104,780,000

In dollars.
Geographical Area: Tulsa Regional Statistical Area.
Source: Hoovers Online, 2012.
Compiled by Research Wizard, Tulsa City-County Library.

In recent years the Tulsa area has drawn significant grant money to address workforce issues. For example, a Social Innovation Grant funded Transportation Connections WorkAdvance, a sector-based career advancement program that provides unemployed and under-employed individuals with high-quality training, job placement, and advancement services that are designed to respond to the needs of the city's transportation and aerospace sectors. Employers who have hired clients include Melton Truck Lines, Nordam Group, Hill Manufacturing, Flight Safety International, and many more. Transportation Connections was created through a collaborative effort between Workforce Tulsa, Madison Strategies, and private

industry. Tulsa is also part of the Talent Dividend network and prize competition, which awards a \$1 million prize to the city that exhibits the greatest increase in the number of post-secondary degrees granted per one thousand population over a four-year period. Finally, Tulsa participates in the state and region's effort to implement Career Pathways, which includes the full range of secondary, adult and post-secondary education aligned with the skills needs of regional industries. Our metro area offers many more resources than these for both the employer and the job seeker. For more information, please go to workforcetulsa.com. 

tgov tulsa

TGOV's specific objectives include:

TGOV is educational. TGOV accomplishes its educational objectives through special programming featuring cultural and historical content about the City of Tulsa.

TGOV is non editorial. TGOV provides direct non editorial information about the operations, services and deliberations of government to its viewers.

TGOV is nonpolitical. This channel is not a mechanism for building support for a particular ballot issue or candidate for public office. TGOV allows for the broadcast of non-partisan programs intended to inform the citizens of ballot issues.

TGOV is noncommercial. It is enforced by charter that TGOV will not air commercial content.

TGOV is exclusive. All of the programming on TGOV relates to the City of Tulsa.

In January 2013, Tulsa's government access station introduced a new look and even more ways for citizens to participate in their municipal government. This year, TGOV launched a brand new, easy-to-navigate website. In addition, TGOV is now on Facebook, Twitter, and YouTube. These changes were made in response to a 2011 Citizen Survey commissioned by the City of Tulsa, which found that TGOV is viewed by nearly 50 percent of Tulsa households. Of those viewers, 85 percent expressed satisfaction with TGOV's content. The Tulsa City Council decided to make TGOV easier to access than ever.

TGOV began in 2004 as a TV channel. Today, viewers can not only watch TGOV on digital cable television, but also watch it live streaming or on-demand online. Twenty-four hours a day, seven days a week, TGOV can be watched anywhere by anyone with internet access, further extending the reach of Tulsa's public affairs programs.

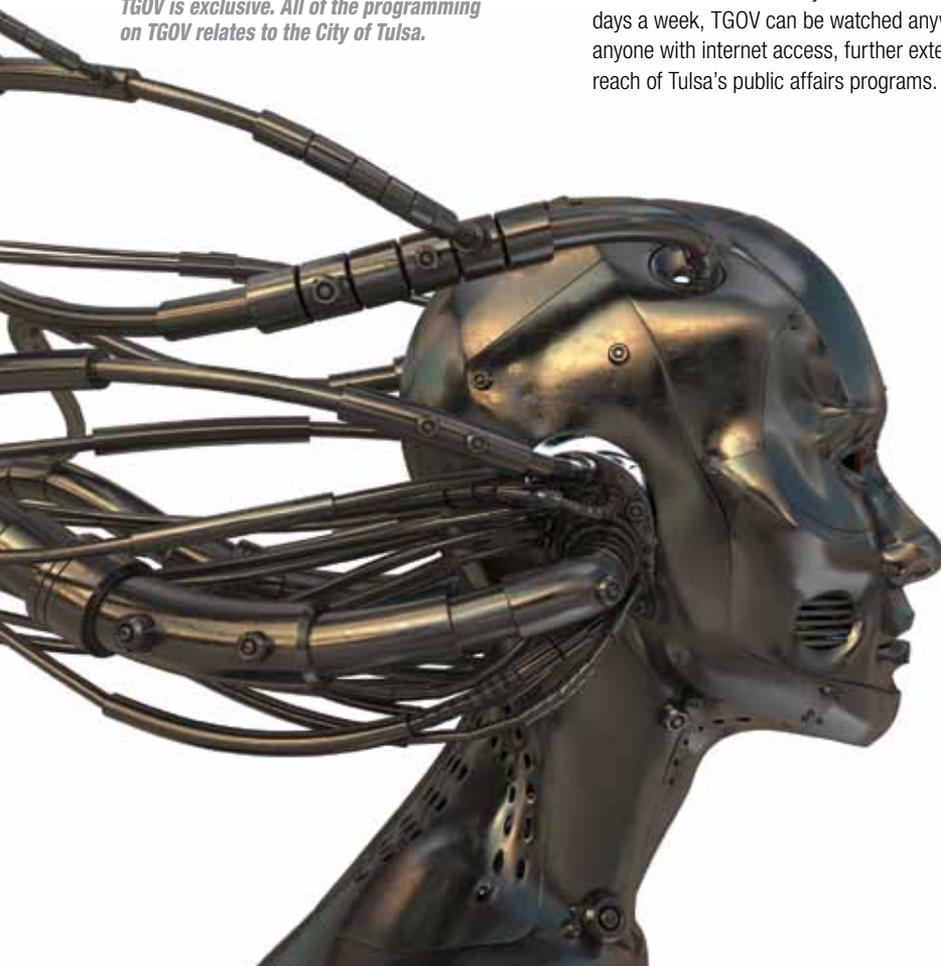
TGOV strives toward its objective of promoting a more informed citizenry by broadcasting public meetings. TGOV broadcasts the live and prerecorded meetings of the City Council, the City Council committees, the Board of Adjustment, the Tulsa Airports Improvement Trust, the Tulsa Metropolitan Area Planning Commission, the Transportation Advisory Board, and more. And TGOV's live meeting coverage keeps growing. City-County organizations such as the Greater Tulsa Area Hispanic Affairs Commission are now broadcasting their meetings live on TGOV. The city government-related programming on TGOV doesn't end there. Shows like the Mayor's Message and Council District Focus provide viewers with additional insight into the workings of their city government through interview segments with their elected officials.

TGOV delivers plenty of original programming, too. TGOV staff collaborates with various departments to create video content intended to increase the effectiveness of public information and safety campaigns, which make up a large portion of TGOV's content.

TGOV also provides coverage of City of Tulsa press conferences and events. Ceremonies such as the inauguration of elected officials and the annual State of the City address air on TGOV, as well.

TGOV plans to continue to grow and serve the citizens of Tulsa.

TGOV can be watched on Cox Digital Cable channel 24 or online at <http://tgovonline.org>. ◆



city government

The City of Tulsa was established in 1898 while Oklahoma was still Indian Territory. After Oklahoma became the 46th state in 1907, Tulsa adopted its first city charter in July of 1908, which was approved by Oklahoma Governor Charles Haskell on January 5, 1909.

For nearly 80 years, Tulsa was governed by a board of commissioners, which included a mayor and four commissioners: police and fire, streets and public property, waterworks and sewerage, and finance and revenue. In 1990, Tulsans voted to change to a mayor-council form of government in an effort to create a more effective city government.

Today, the municipal government consists of three branches: the mayor, the city council and the city auditor.

The Mayor of Tulsa serves a four-year term and fulfills the administrative and executive duties of city government. The mayor submits an annual budget to the city council. The mayor also supervises City of Tulsa employees and is responsible for appointing citizens to the various authorities, boards and commissions. The 2013 mayoral election will be the first mayoral election since Tulsans voted in November 2011 to make all municipal elections nonpartisan.

The nine members of the Tulsa City Council serve as the legislative branch of Tulsa's government. The councilors are elected by districts, which were adjusted in 2011 to reflect the population trends revealed by the 2010 census. Following the 2014 municipal elections, councilors will be elected for two-year terms aligned with state and federal elections.

The council is responsible for passing local laws and establishing city policy. They also review and approve the annual city budget of more than 500 million dollars. Councilors review and take action on mayoral appointees to authorities, boards, and commissions.

The city council meets Thursday afternoons for committee meetings on the fourth floor of City Hall and holds regular meetings on Thursdays at 6 p.m. on the second floor of City Hall. The council encourages the public to attend and provide input at the Thursday night meetings. All council meetings are broadcast live and replayed on TGOV, Tulsa's government access channel. TGOV can be viewed on Cox Cable digital channel 24 or live streaming or on-demand at tgvonline.org. Agendas and back-up materials are available online at tulsacouncil.org or at the city council office on the fourth floor of City Hall.

Tulsa's City Auditor serves a two-year term after being elected into office. The city auditor and the internal auditing staff periodically audit all city departments and use their findings to make suggestions to the mayor and the council on how to better maintain financial records and report irregular financial activity within city departments.

Dozens of boards, commissions, and authorities also play a role in the daily operation of Tulsa's government. Citizen volunteers provide valuable input to the mayor and councilors, who use that information to create policies and programs. There are a variety of different boards which serve many different interests. Citizens can find out more about available positions and apply online on the City of Tulsa website.

The mayor, the city auditor and the city council offices can be found at City Hall/One Technology Center (OTC) building, 175 East 2nd Street in downtown Tulsa. The mayor and mayoral staff are located on the 15th floor of the OTC building and can be reached at 918.596.7411. The city auditor's office is located on the 6th floor of the OTC building and can be reached at 918.596.7511. The city council office is on the 4th floor of OTC, and can be reached at 918.596.1990. Parking is conveniently located in the lot south of the City Hall.

More information can be found on the City of Tulsa website, cityoftulsa.org, or on the City Council website, tulsacouncil.org.

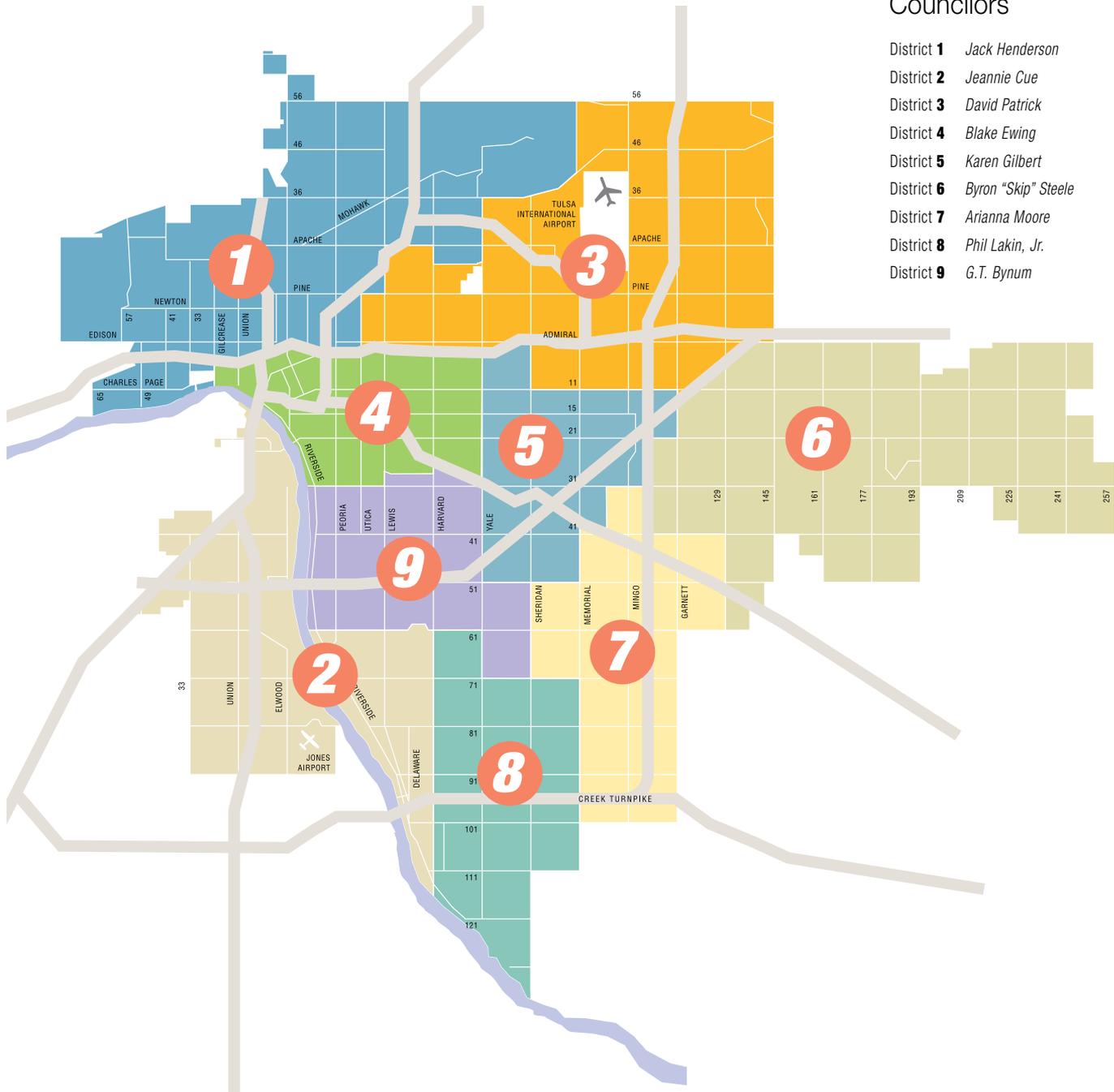


Tulsa City Hall.



Tulsa City Councilors

- District 1 *Jack Henderson*
- District 2 *Jeannie Cue*
- District 3 *David Patrick*
- District 4 *Blake Ewing*
- District 5 *Karen Gilbert*
- District 6 *Byron "Skip" Steele*
- District 7 *Arianna Moore*
- District 8 *Phil Lakin, Jr.*
- District 9 *G.T. Bynum*



economic profile

2012 TULSA ECONOMIC INDICATORS

	1998	1999	2000	2001	2002
Personal Income¹ (millions of dollars)					
Tulsa MSA/Current	22,016.5	22,816.0	24,813.8	26,629.1	26,297.3
Tulsa MSA/Real	25,527.6	26,035.0	27,626.7	29,093.3	28,344.3
Tulsa County/Current	16,394.0	16,918.4	18,400.5	19,670.6	19,192.9
Tulsa County/Real	19,008.4	19,305.4	20,486.5	21,490.9	20,686.9
Labor Market /Tulsa MSA					
Total labor force (thousands)	437.9	440.9	440.3	443.3	445.8
Wage & salary employment (thousands)	394.4	398.0	407.7	409.9	402.6
Unemployment rate (percent)	3.6	3.5	2.9	3.4	5.0
Construction /City of Tulsa					
Single-family units	578	659	621	516	490
Multi-family units	1,614	1,424	58	254	392
Finance					
Tulsa prime rate (percent)	9.5	9.2	10.3	8.2	5.9
Transportation					
TUL passengers	3,463,214	3,419,975	3,498,722	3,243,965	2,907,308
TUL air freight (tons)	48,905	51,418	52,458	48,294	48,188
Port barge tonnage (tons)	2,417,537	2,242,850	2,210,061	2,046,692	2,223,103
Consumer Price Index /All Urban Consumers (1982—1984=100) (points)					
	163.0	166.6	172.2	177.1	179.9
Personal Consumption Expenditures /Implicit Price Deflator (2005=100) (points)					
	86.246	87.636	89.818	91.530	92.778
Gross Domestic Product / U.S.					
Real GDP in billions 2005 inflation adjusted dollars	10,274.7	10,770.7	11,216.4	11,337.5	11,543.1

¹ 2011 Personal Income estimates.

Real = deflated dollars. Personal Income series is expressed in 2005 dollars using the Implicit Price Deflator as an adjustment factor.

Tulsa MSA is comprised of Creek, Okmulgee, Osage, Pawnee, Rogers, Tulsa, and Wagoner counties.

Sources: Tulsa City Council; Research Wizard, Tulsa City-County Library.

2003	2004	2005	2006	2007	2008	2009	2010 ¹	2011
26,535.4	28,614.4	30,734.1	34,392.5	35,773.2	40,197.6	35,072.3	36,565.0	37,705.8
28,032.6	29,462.6	30,734.1	33,480.9	33,908.6	36,897.9	32,175.2	32,915.6	33,136.3
19,297.4	20,989.1	22,560.9	25,321.4	25,922.3	29,496.5	24,596.4	25,710.8	26,512.9
20,386.2	21,611.3	22,560.9	24,650.2	24,571.2	27,075.1	22,564.7	23,144.7	23,299.9
442.7	438.1	443.4	444.7	440.8	440.1	441.0	441.7	437.2
390.8	393.0	406.4	419.3	427.6	433.1	413.0	405.9	407.4
6.1	5.1	4.4	4.0	4.0	3.7	7.1	7.7	6.9
463	506	677	693	664	429	372	340	320
128	14	87	0	9	399	344	73	695
5.4	5.6	7.43	8.81	8.85	6.00	4.58	4.58	4.58
2,747,203	2,943,919	3,132,962	3,168,716	3,218,429	3,180,765	2,812,295	2,763,562	2,707,386
51,059	54,825	53,578	56,784	60,103	59,334	58,975	54,675	55,743
2,250,139	2,220,871	1,819,905	2,321,448	2,010,505	2,050,349	2,058,191	2,266,893	2,160,624
184.0	188.9	195.3	201.6	207.3	215.3	214.5	218.1	224.9
94.659	97.121	100.000	102.723	105.499	108.943	109.004	111.087	113.79
11,836.4	12,246.9	12,623.0	12,958.5	13,206.4	13,161.9	12,757.9	13,063.0	13,299.1

acknowledgments

Principal contributors

Drew Rees, *City Council Administrator/Chief of Staff*, received his B.S. in Finance, with a minor in Economics from Oklahoma State University, and his J.D. from the University of Tulsa in 1993.

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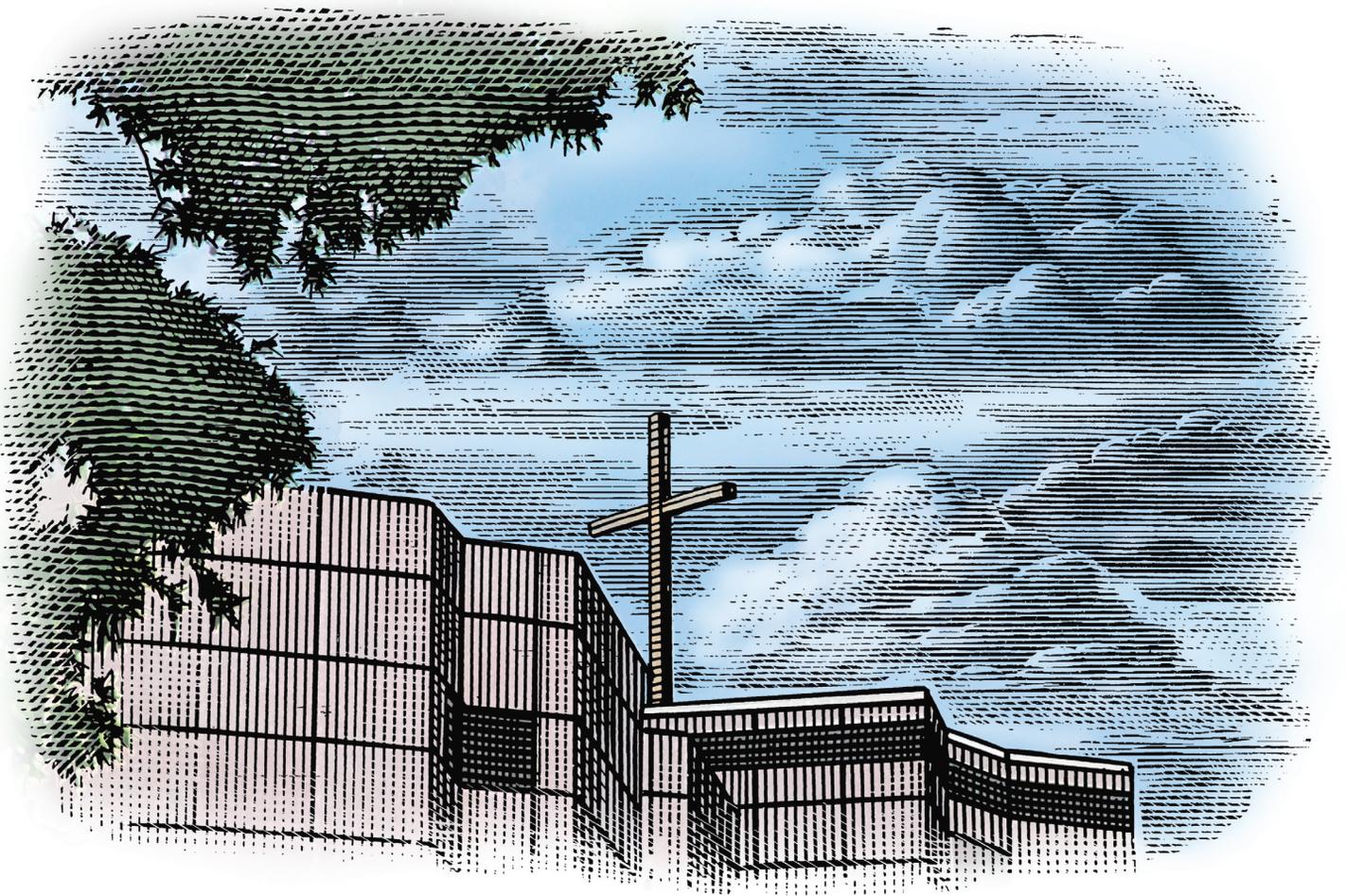


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