

Southwest Oklahoma



COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

2014-2018

Prepared by:

SOUTH WESTERN OKLAHOMA DEVELOPMENT AUTHORITY

420 Sooner Drive Burns Flat, OK 73624

(580) 562-4882 www.swoda.org

DEBORA GLASGOW, Executive Director

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CEDS 2014-2018

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Introduction

1. **ec·o·nom·ic [ek-uh-nom-ik] - pertaining to the production, distribution and use of income, wealth and commodities.**
2. **de·vel·op·ment [dih-vel-uhp-muhnt] - the act or process of growing, progressing, developing or planning.**

The South Western Oklahoma Development Authority (SWODA), headquartered in Burns Flat, was created in 1971 in a joint effort by municipalities, counties and conservation districts in Beckham, Custer, Greer, Harmon, Jackson, Kiowa, Roger Mills and Washita counties.

From these governmental units and from other population segments in the region, 30 representatives are elected to serve on SWODA's governing board. The board of trustees determines policy for SWODA. Leaders in these communities recognized that some problems shared by many of these governments could be better solved if they worked together.

Mission:

Strengthen local governments by providing services and technical assistance.

Promote orderly growth and development through job creation and the preservation of the environmental integrity.

Improve the quality of life by maximizing economic and social opportunities for the region and its population.

Economic development has many definitions depending upon your perspective. It may be contemplated on a personal, city/town, county, regional, state, national or global basis. Some might believe it revolves solely around the strengths or weaknesses of the workforce or the ability to create or retain jobs. Others believe economic development results only from private entrepreneurial investment.

According to many, federal, state or local incentives and investments are necessary. Still, some believe that economic development only occurs where there are clusters of resources or knowledge. Some may even believe that there is some "special ingredient" that must be present, and economic development just spontaneously happens.

But maybe, under the right circumstances, economic development can be cultivated, carefully refined, educated, cultured ~ PLANNED.

The Planning Organization

Planning may be the most important part of the economic development definition. South Western Oklahoma Development Authority (SWODA) serves the Economic Development District (EDD) for Southwest Oklahoma. SWODA employs high-quality professional staff that provide planning, management and technical assistance throughout an eight-county area. SWODA staff, its board of trustees and member governments work hand-in-hand with the Southwest Workforce Investment Board and numerous other interested organizations and individuals.

The Southwest Workforce Investment Board also serves as the strategy committee for the Southwest Oklahoma Comprehensive Economic Development Strategy (CEDS).

CEDS Plan of Action

SOUTHWEST OKLAHOMA ECONOMIC DEVELOPMENT DISTRICT

*is comprised on the following counties:
Beckham, Custer, Greer, Harmon, Jackson,
Kiowa, Roger Mills and Washita.*

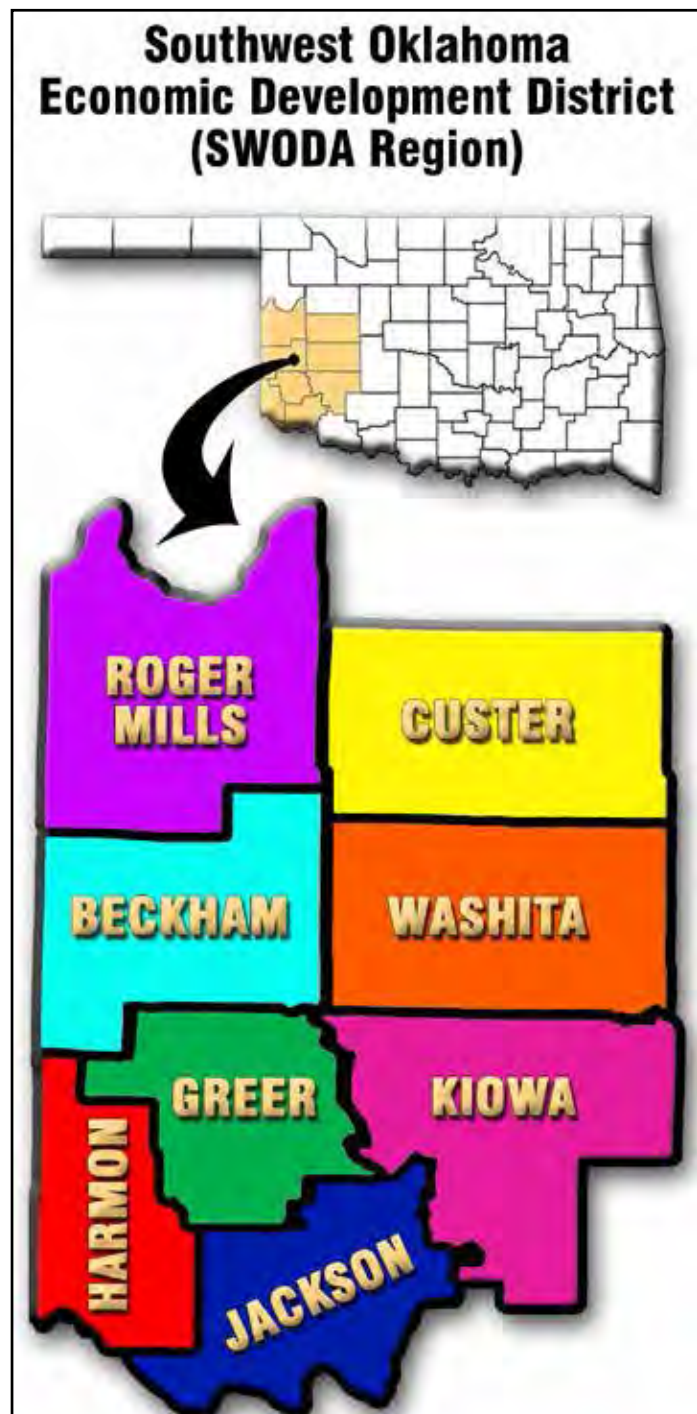
The Comprehensive Economic Development Strategy's (CEDS) intent is to change and improve the course of economic development in the district, while building on the district's existing economic strengths. The CEDS' main emphasis is to build on the role for the district, to provide regional leadership in economic development and coordination of economic development resources.

There are many agencies and organizations involved with economic development in the district. The strategy calls for the district to allocate additional staff resources to economic development and to utilize when possible a wide range of partners.

The district will make every effort to leverage economic development resources through collaboration with stakeholders. The Center for Economic and Business Development at SWOSU serving the district and the Southwest Oklahoma Workforce Investment Board are examples of public and private sector collaboration within the district.

It is especially incumbent on the district and its member cities to collaborate in supporting business growth and development. The district can assist cities by coordinating regional land use and infrastructure planning, supporting initiatives to develop regional solutions to economic constraints such as water supply, and cooperating with the efforts of cities and other agencies to access state and federal funds for vital projects in the district.

It is critical that the district continues its efforts to maintain a supportive business environment in its daily interaction with member communities. There is no better tool for business retention and expansion, and ultimately business attraction, than efficient service delivery and satisfied customers.



General Economic Conditions

The economy in Southwest Oklahoma generally follows the state of Oklahoma. The southwest region is rural and the major industries are agriculture, government (federal and state), and oil and natural gas industry.

According to information from the Oklahoma Employment Security Commission (OESC) January 2014 issue of Oklahoma Economic Indicators, Oklahoma's economy typically follows a similar trend to that of the nation. State gross domestic prod-

uct (GDP) data lags behind national data and is only available annually. The data is not a good indicator of current economic conditions and doesn't fully reflect the recent changes in Oklahoma's economic climate or that of the southwestern Oklahoma. However, it's still valuable in understanding the state's growth trend compared to the nation and what industries are the largest contributors to Oklahoma's economy.

Southwest Oklahoma Economic Development District Gross Regional Product (GRP) by County

| \$2,489,200,923 | | \$1,197,153,326 | \$233,380,822 | \$3,919,735,072 |
|-----------------|--|------------------------|-----------------------------|------------------|
| Earnings (2011) | | Property Income (2011) | Taxes on Productions (2011) | Total GRP (2011) |
| NAICS | Industry | GRP (2011) | | % of Total |
| 11 | Agriculture, Forestry, Fishing and Hunting | \$174,587,620 | 4% | |
| 21 | Mining, Quarrying, and Oil and Gas Extraction | \$919,235,782 | 23% | |
| 22 | Utilities | \$82,198,838 | 2% | |
| 23 | Construction | \$125,768,943 | 3% | |
| 31 | Manufacturing | \$239,608,792 | 6% | |
| 42 | Wholesale Trade | \$137,679,557 | 4% | |
| 44 | Retail Trade | \$258,623,518 | 7% | |
| 48 | Transportation and Warehousing | \$134,931,923 | 3% | |
| 51 | Information | \$31,116,467 | 1% | |
| 52 | Finance and Insurance | \$168,281,735 | 4% | |
| 53 | Real Estate and Rental and Leasing | \$177,475,105 | 5% | |
| 54 | Professional, Scientific, and Technical Services | \$71,994,356 | 2% | |
| 55 | Management of Companies and Enterprises | \$6,378,758 | 0% | |
| 56 | Administrative and Support and Waste Management and Remediation Services | \$57,936,861 | 1% | |
| 61 | Educational Services (Private) | \$19,440,417 | 0% | |
| 62 | Health Care and Social Assistance | \$172,107,962 | 4% | |
| 71 | Arts, Entertainment, and Recreation | \$20,918,805 | 1% | |
| 72 | Accommodation and Food Services | \$89,834,516 | 2% | |
| 81 | Other Services (except Public Administration) | \$66,539,310 | 2% | |
| 90 | Government | \$749,623,830 | 19% | |
| | Other non-industries | \$215,451,975 | 5% | |

Data Source: Economic Modeling Specialists International

Oklahoma, along with 48 states and the District of Columbia, saw growth in real GDP in 2012, according to estimates from the Bureau of Economic Analysis (BEA). Oklahoma's real GDP growth rate of 2.1 percent ranked it 23rd among all other states. Oklahoma had a real GDP of \$138.3 billion in 2012, up from \$135.5 billion the year before.

Real GDP increased in all eight BEA regions in 2012, with growth accelerating in seven of eight regions. The Southwest region, which includes Oklahoma, grew the fastest (4.1 percent), led by Texas with a 4.8 percent increase.

Durable-goods manufacturing was the largest contributor to U.S. real GDP by state growth in 2012, including Oklahoma, where it contributed 0.78 percentage points to overall growth. Other industries adding to 2012 GDP growth in Oklahoma were wholesale trade (0.37 percent); retail trade (0.33 percent); real estate, rental & leasing (0.32 percent); finance & insurance (0.25 percent); accommodation and food services (0.12 percent) and government (0.12 percent). Subtracting from state GDP growth were mining (-0.72 percent) and management of companies (-0.15 percent).

Population

For just the second time in 80 years, the eight-county region is experiencing population growth. Population has migrated within and into the district mostly because of the national energy boom.

Southwest Oklahoma has three micropolitan areas: Elk City, Weatherford and Altus. The Elk City and Weatherford micropolitan areas were in the Top 20 of the nation's fastest growing areas between 2011-2012. The population of the Elk City area increased 16.6 percent and the Weatherford area increased 9.2 percent. These areas are both located in oil and natural gas drilling regions.

Conversely, the Altus micropolitan area, which is outside the oil and gas region, decreased 7.7 percent. The Altus area contains Altus Air Force Base which has endured reductions in federal spending in recent years because of the national recession. The reductions in spending have resulted in fewer troops present on base and less economic opportunities in the area.

The district encompasses 7,011 square miles and is larger than Rhode Island, Connecticut, Delaware or Hawaii. The area is only slightly smaller than that of Massachusetts or New Jersey. This small population scattered widely over a large geographical area presents challenges when dealing with workforce and economic development issues. An examination of the area over time provides a broader and more telling picture than a static focus on the current data, since this geographic area has been through several "boom and bust" cycles.

The largest population ever officially counted in the area was 192,663. But

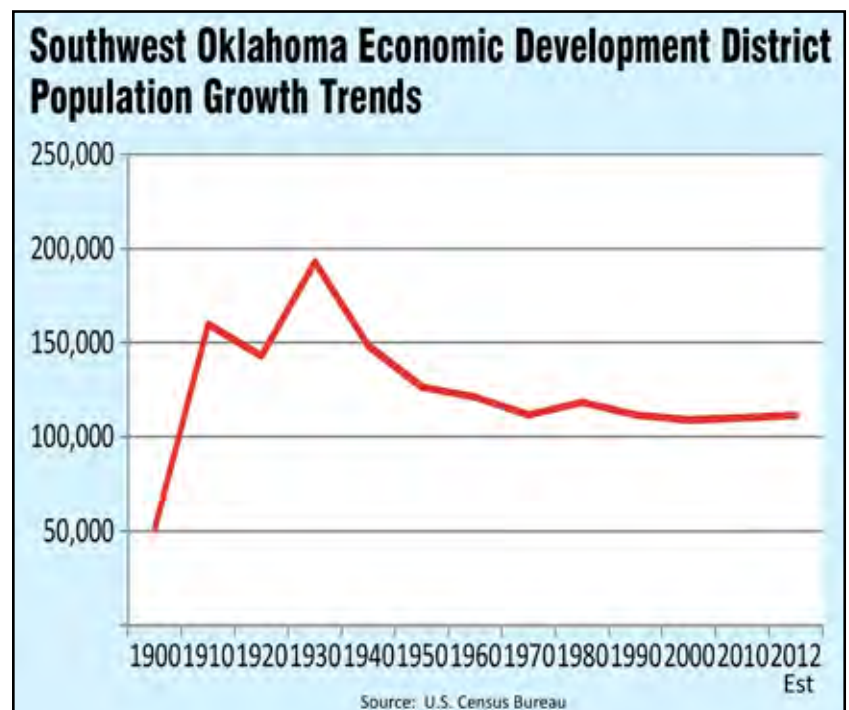
by 1940, the effects of the Great Depression and the Dust Bowl were apparent, as the region's population had fallen to 148,346. The decline in population continued until 1980 when, in the midst of the oil boom associated with exploration activities in the Anadarko Basin, the figure rose to 118,449 as opposed to the 1970 count of 111,561.

Subsequent census totals in 1990 and 2000, demonstrated the population decline continued when the boom ended. In 2000, the region posted its smallest population count of 108,895.

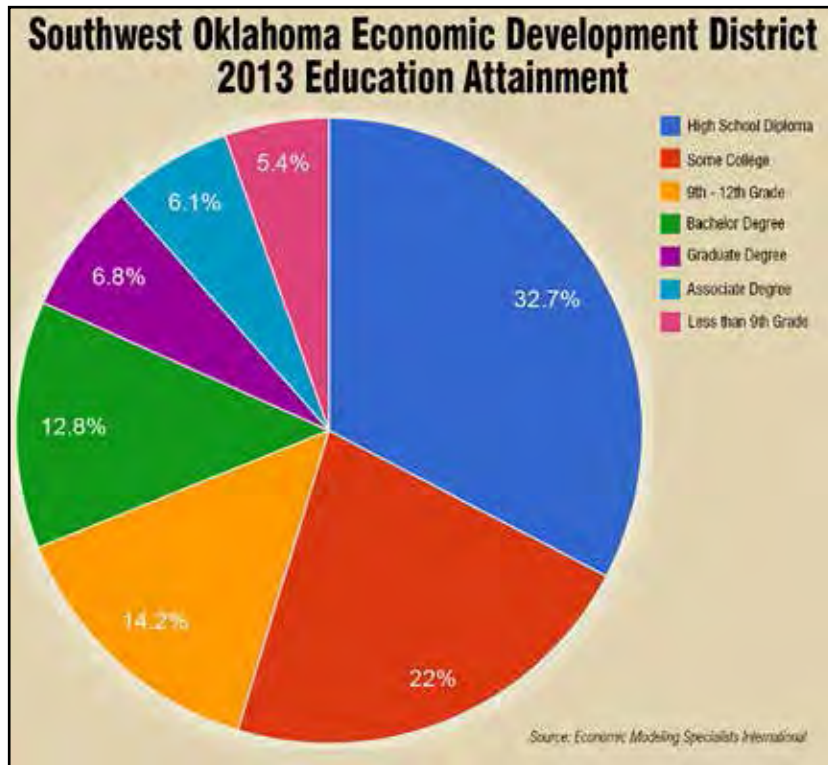
The fastest growing minority population over the last 30 years has been Hispanic. The Hispanic population more than doubled from 4,282 in 1970 to 10,381 in 2000, and continued to increase in 2010 data.

Age distribution over the years shows some surprising changes. A common conception held by many is that young people, once graduating from high school or college, are faced with a stagnant job market in the region and are thus forced to relocate to other parts of the country. Newest census data supports this theory, with a decline in the age 15-24 population.

Additional census data the district is located in the appendix of this document.



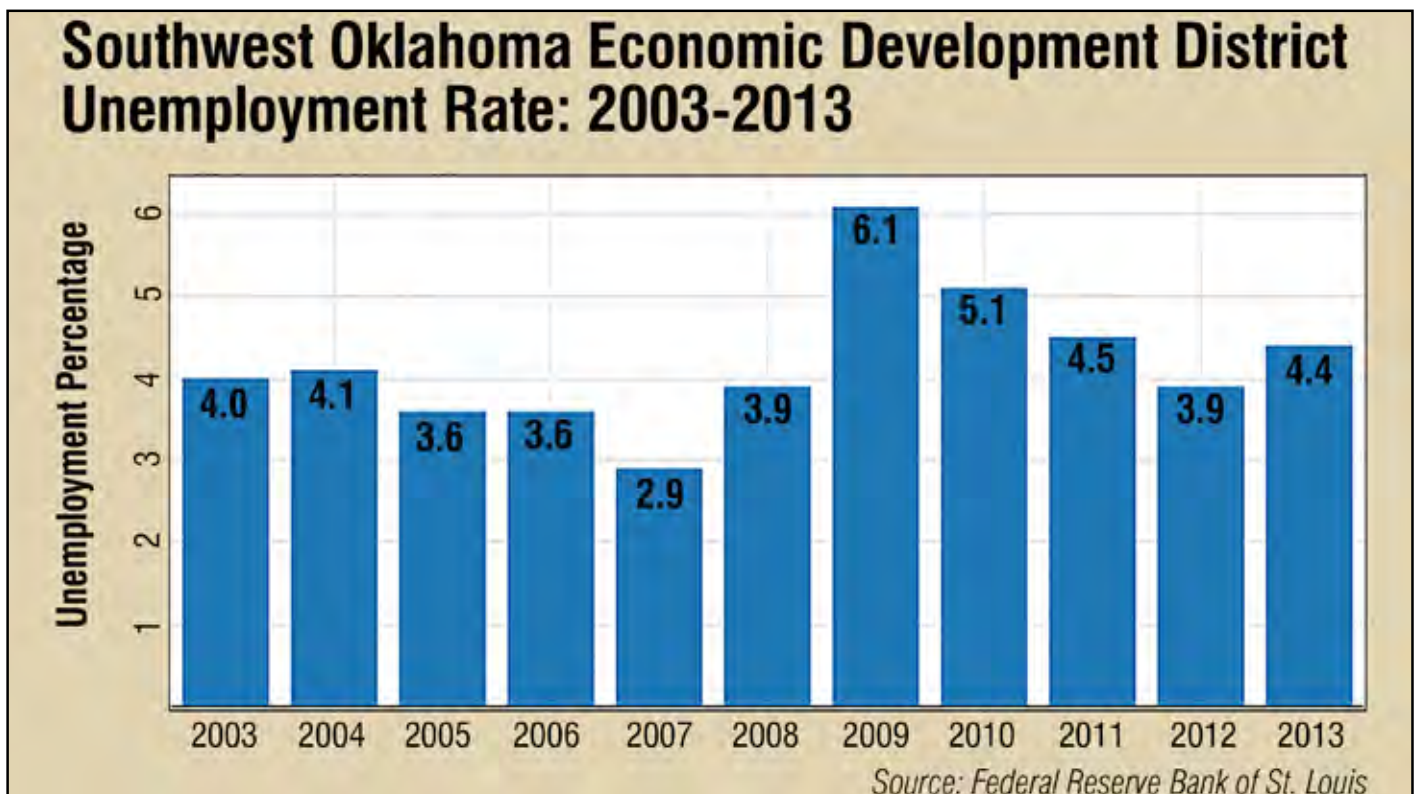
Workforce Development & Use

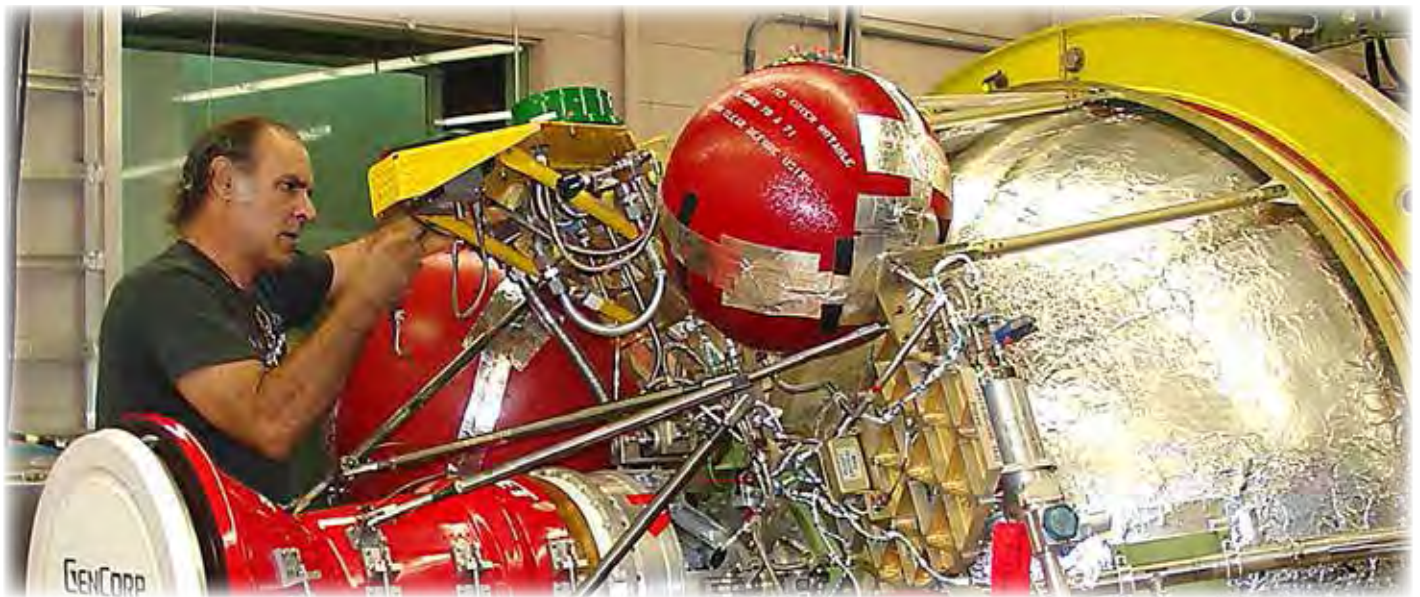


Shifts in population and demographics require the Workforce Development System to constantly analyze both the workforce and its makeup while focusing on the industry clusters that exist in the area and working to meet their specific needs.

Implementing efforts supported by the Governor's Council on Workforce and Economic Development, such as promoting the Oklahoma Career Ready Certificate through our Workforce Centers and examination of sustainable and emerging industry clusters, give our local system needed resources and abilities to respond to the challenges of the changing, churning workforce currently existing in our area.

Three industry clusters in the area (manufacturing, health care and aviation)





Aviation is one of three industry clusters that have been extensively studied during the past three years.

have been extensively studied during the past three years through various sources including the efforts of Southwest Oklahoma Impact Coalition's (SOIC) and sector strategist. The studies have resulted in increased focus on these industries and how to support them and their workforce needs.

The continued boom cycle for oil and gas exploration in the area presents a continuing challenge of recruitment and placement in a physically demanding industry noted for its large amount of entry level jobs requiring fewer skills.

Hispanics present a workforce challenge dealing with English language abilities particularly as it affects supervision and training for a non-English speaking workforce.

A project is currently underway to unify the service strategies of all Workforce System partners in the area (Workforce Investment Boards, Department of Commerce, Employment Security Commission, Department of Vocational Rehabilitation, Department of Human Services, etc.). Through a deliberative process involving service mapping and gap analysis, the goal of serving the workforce job seeking customer and the employer customer in a more productive way is the anticipated outcome of this project.

SW OK Economic Development District Major Employers

| Company | City | Employment Range | Product |
|--|--------------------------------------|------------------|--|
| Altus Air Force Base | Altus | 4,590 | Fed. Government Installation |
| Bar S Foods | Altus, Clinton, Elk City | 1,000 - 1,200 | Meat Processing; Poultry Slaughtering & Processing |
| Walmart | Weatherford, Elk City, Hobart, Altus | 700 - 900 | Retail |
| Jackson County Memorial Hospital | Altus | 700 - 800 | Health Care |
| Southwestern Oklahoma State University | Weatherford | 600 - 700 | Education |
| Altus Public Schools | Altus | 600 - 650 | Education |
| Oklahoma State Reformatory | Granite | 400 - 450 | Correctional Institution |
| Great Plains Regional Medical | Elk City | 325 - 375 | Health Care |
| North Fork Correctional Facility | Sayre | 325 - 375 | Private Prison |
| Lucky Star Casino | Clinton | 300 - 350 | Recreation |

Source: 2010 Oklahoma Directory of Manufacturers and Processors

Geography



The northwest area of the SWODA Economic Development District consists of grassland and rolling hills.

One of the main geographic features affecting the economy of the southwestern Oklahoma is its large, sparsely-populated area. In such a setting, communication and transportation costs are greatly increased. Cultural and recreational facilities are lacking because of the large geographic size and resulting small population.

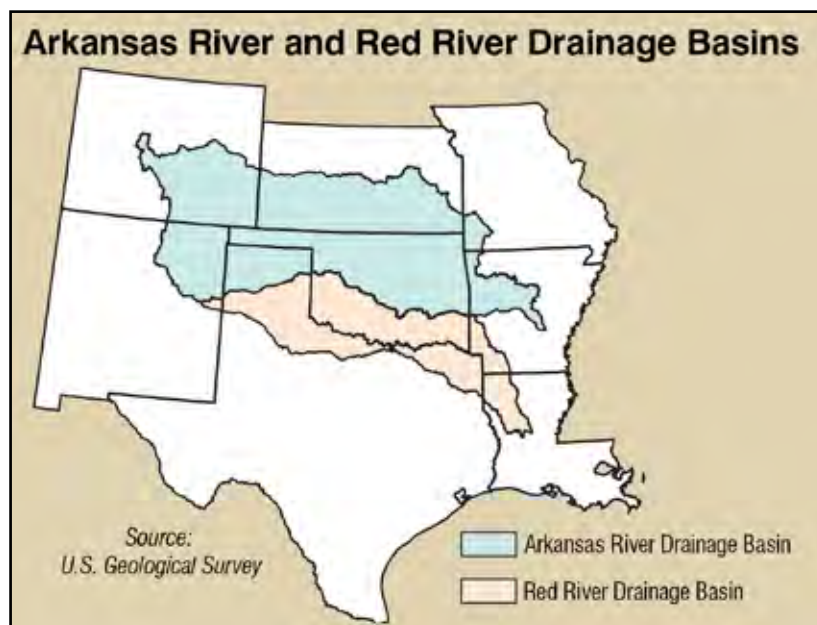
Consisting of mainly flat grassland and gently rolling hills, Southwest Oklahoma is typical of the Great Plains region of the United States, although it is less dry than adjacent West Texas. The district covers an area of approximately 7,011 square miles or 4,487,040 acres.

The elevation varies from 2,550 feet above mean sea level at the extreme northwestern corner of the district to 1,200 feet above mean sea level at the district's extreme southeastern corner.

The area is drained by the Red River Basin with the exception of a small area in Roger Mills and Custer counties which are drained by the Arkansas River Basin.

Granite and limestone mountains are located in the southeastern part of the SWODA district. The district's south central area has quartz mountains. Granite resources produce monument-quality stone. High-quality road building crushed limestone is produced in Kiowa County.

Other types of stone are widespread over the district. Sand and gravel beds produce material for concrete. Salt is found in commercial quantities in Greer and Harmon counties. Gypsum is found mainly in Jackson and Washita counties.



Area around Granite, Okla., is known for high-quality granite stone for monuments.

Environment

The eight counties in the SWODA Economic Development District (EDD) have a humid, subtropical climate and receive anywhere from about 25 inches of precipitation annually in the far western section to 32 inches annually in the east. Monsoon-like rains are common in the spring months while periods of drought can occur throughout other parts of the year.

As of March 4, 2014, all eight counties in the district were under extreme drought conditions. Jackson, Harmon and the very southern border of Greer County were under exceptional drought which is the most severe drought designation. The drought, which began in the fall of 2010, has affected all of Oklahoma during the past three-plus years. The severe drought is taking a toll on water resources throughout the district and is causing economic impact beyond just the agricultural industry.

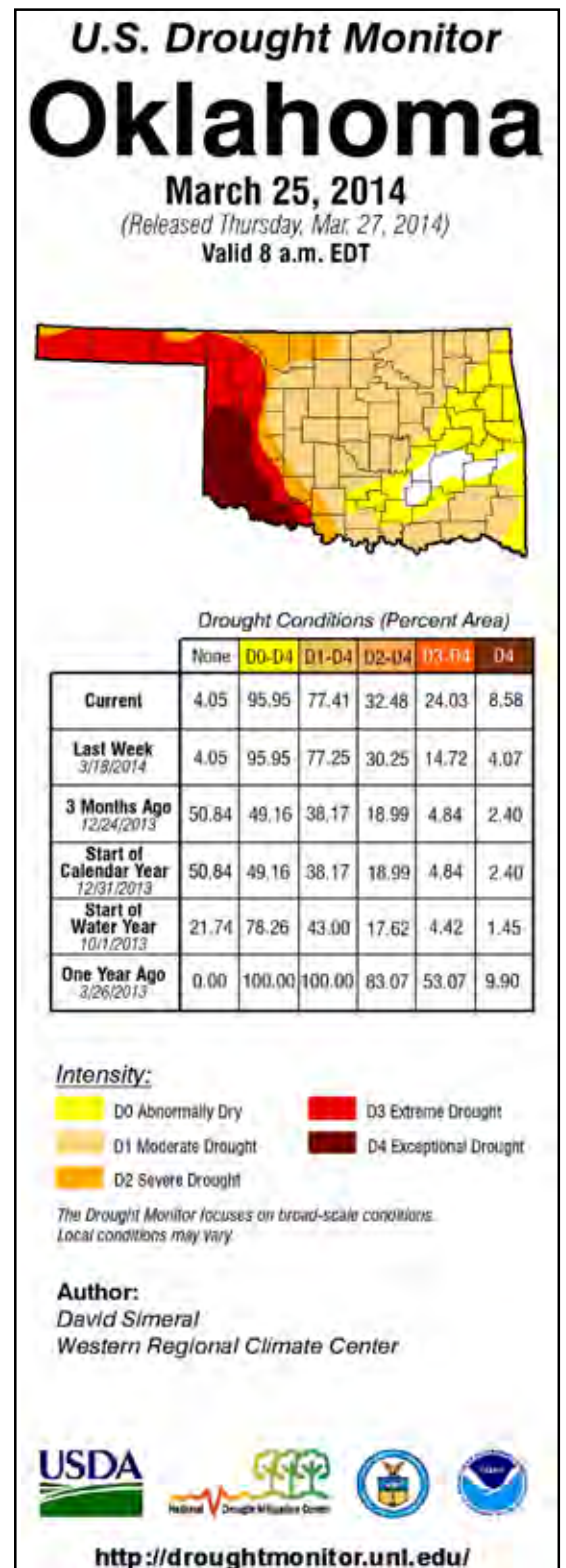
At the start of 2013, the entire state of Oklahoma was covered by at least severe drought, with 95 percent of that in the extreme to exceptional category. Drought reduction throughout the year occurred in the eastern two-thirds of the state.

In October 2013, Oklahoma Governor Mary Fallin declared a drought emergency including Jackson, Greer and Harmon counties. In January 2014, the U.S. Department of Agriculture (USDA) designated counties in 11 states as primary natural disaster areas because of the drought. This includes 20 counties in Oklahoma covering all eight counties in the district.

Altus' main water supply reservoir, Tom Steed Lake, was approximately 13 feet below normal at year's end. The Jackson County city has been under emergency water conservation orders since early May 2013.

Lake Altus-Lugert (a crop irrigation source) is 29.50 feet below normal. After conducting a four-day survey in April 2013, Oklahoma Department of Wildlife Conservation biologists announced that the lake is essentially dead as a fishery. Using electrofishing and gill netting, they found no live fish. They estimated that toxic golden algae had killed more than 350,000 fish over a three-month period.

Farther north in Custer County, Foss Lake is approximately 16 feet below normal. The reservoir provides drinking water to more than 15,000 residents in the district.



Jackson County Conservation District

John Dee Butchee, District Manager
February 4, 2014

Governor Fallin recently declared a drought disaster for Jackson, Harmon, Tillman, and Greer Counties in SW Oklahoma and Texas County in the panhandle. This declaration created the opportunity for each of these counties to receive some emergency drought relief funds for projects that would bring immediate relief.

As a result, we are currently administering a cost-share program that provides financial assistance to local producers to install the following practices for livestock water: rural water taps, livestock pipelines, wells, pumping plants and watering facilities. Because the conservation district vehicle was already up and running, these funds were immediately made available to our producers and are already hard at work providing some much needed drought relief.

Examples of Conservation District Drought Efforts

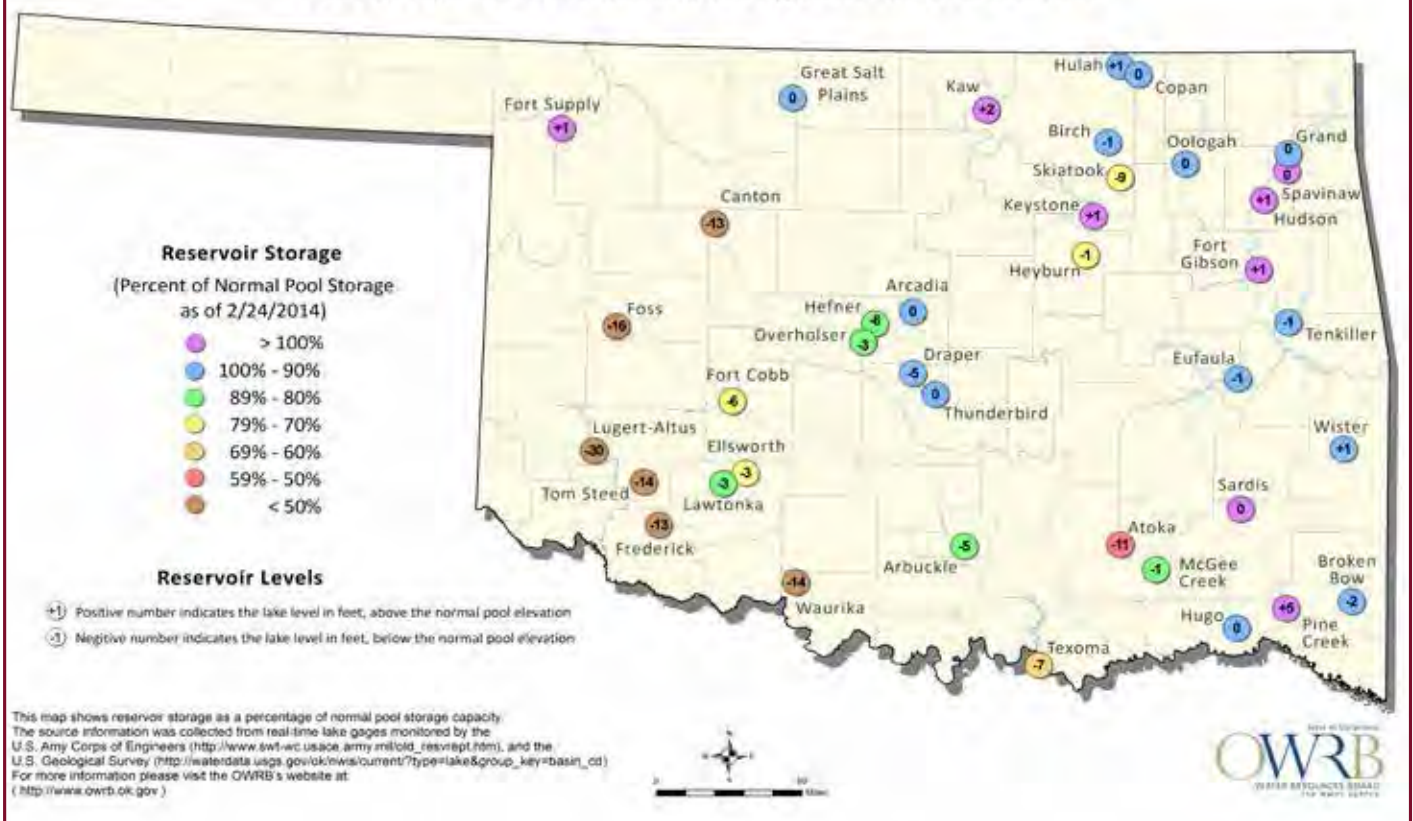
Harmon County Conservation District

Geary Caswell, Dist. Manager
February 5, 2014

Harmon County has been in an exceptional drought for the past few years and as a result most cattle herds have been greatly reduced, some herds have been liquidated due to no water or pasture. Most pastures are in poor to very poor condition due to a severe decrease in grass stand populations due to the drought. The majority of irrigation wells in Harmon County have run out of water the past few years before crops can produce.

Harmon County is one of the five counties in Oklahoma that qualifies for the Emergency Drought Relief Program. The Harmon County Conservation District is assisting cooperators with participation in the Emergency Drought Relief Program.

Oklahoma Surface Water Resources Reservoir Levels and Storage as of 2/24/2014



Economic Impact of the SW Oklahoma Drought



Drought conditions has had a negative effect on Southwest Oklahoma's stocker cattle industry.

Southwest District Oklahoma Cooperative Extension

Jason Pace, Southwest Area Agriculture Economist

March 18, 2014—The entire Southern Plains region of the U.S. began experiencing a severe drought in the fall of 2010. While much of the region saw relief in the spring and summer of 2012, severe drought persisted in Southwest Oklahoma. Currently, much of Southwest Oklahoma is in “Extreme” or “Exceptional” drought categories according to the U.S. Drought Monitor, published by the University of Nebraska. This of course has—and will continue to have—a profound effect on ag producers in the area.

The most widely grown crop in Southwest Oklahoma is Hard Red Winter Wheat. Winter wheat is grown as both a grain crop and a livestock forage crop. The same crop can be grown for both purposes if weather and market conditions are right. Winter wheat needs fall moisture to establish vege-

tative growth prior to dormancy and winter/spring moisture to promote root-system growth as the plants enter into their reproductive stage.

Parts of Southwest Oklahoma benefitted from early snowfall which made for high quality forage through the winter; however, moisture needed to either harvest a grain crop or provide for spring grazing was absent for most of the region. (Wheat is inclined to expend energy on reproductive growth at the expense of vegetative growth in the absence of moisture.) This is detrimental both for producers aiming to harvest a grain crop or graze stocker cattle beyond 400-450 pounds.

The ideal window for moisture as wheat enters its final growth stage is from late February to mid-March. This window has come and gone with less

than a half inch of precipitation for most of the region, which will limit yield potential in the area to less than 30 bushels/acre at best, and in some cases less than 20 bushels/acre. It will be difficult for producers to realize economic profit with these low yields, and crop insurance indemnities will be triggered for several farms.

Another important crop in Southwest Oklahoma is Upland Cotton. The cotton situation is more complex than the wheat situation because many cotton acres in the area are irrigated. Moreover, the 2013 cotton crop was more successful than anticipated because of timely rains last July and August, followed by a healthy number of heat units. Several farms reported irrigated yields in excess of 2,000 lbs/acre (over four bales). Dryland cotton that survived into the summer also did well, with yields in excess of 500 lbs/acre in some places.

Despite the relative success of the 2013 crop, there are a few long-term adverse circumstances for the cotton industry in Oklahoma. The most important of these is the historically low level for Lake Al-

tus-Lugert. Lake Altus-Lugert is the sole source of irrigation in the Lugert-Altus Irrigation District. Lake Altus-Lugert has remained at less than 20% of normal capacity since 2011. The irrigation district has therefore cut off the water supply of formerly irrigated cotton acreage in Jackson and Tillman Counties. This has put producers who had their cotton acres insured as irrigated acres in a bind.

Typically, acres classified as irrigated have to receive a certain volume of water to receive a guarantee level for insurance typical of irrigated cotton. When acres receive less than that volume, those acres are subject to being reclassified as dryland, which has much lower guarantee levels, thus making those acres much less likely to receive indemnity payments. This is troublesome for producers who applied amounts of expensive fertilizer needed for irrigated cotton, but weren't allowed to recoup that cost because insurance companies reclassified those acres as dryland later in the growing seasons.

Producers in the irrigation district are accusing insurance companies of a "bait-and-switch" scheme



Irrigated cotton production around Altus is on hold until Altus-Lugert Lake levels are replenished with much needed rain.

and are bringing lawsuits to recover indemnity payments they say are due. This controversial issue has drawn much media attention as well as the attention of state and national lawmakers.

Finally, the most prolific commodity in terms of agricultural product (total gross sales in dollars) in Southwest Oklahoma is beef cattle. The cattle industry in Southwest Oklahoma has been profoundly affected by drought. Cow-Calf producers have had to liquidate their cow herds due to lack of forage on native pasture. This is especially unfortunate because record-high prices for breeding females have made it impossible for many beef producers to buy back their herd and re-enter the market.

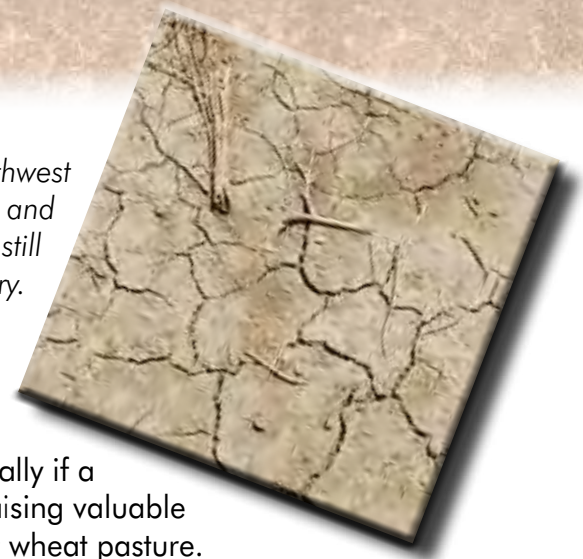
Stocker producers—typically grazing their calves on wheat—have also been dealt a serious blow by the drought. Many stocker producers have not bought calves to graze in two or three years. As mentioned in a preceding paragraph, producers who bought stockers to graze on wheat through the winter had some success—selling calves for high prices in January and February.

The downside is the cattle market is commanding premiums for calves raised to 750 to over 800 pounds, as opposed to typical stocker weights around 600 to 650 pounds. Due to the lack of late winter and early spring moisture, beef producers in Southwest Oklahoma were forced to sell earlier and were thus unable to capture these premiums.

Stocker producers who are grazing cattle on wheat have the choice of pulling their calves off to harvest a grain crop, or foregoing harvest to graze out the vegetation on their wheat crop. This decision must typically be made in mid-March in order to allow wheat plants to enter their reproductive stage and to comply with crop insurance deadlines should producers choose to harvest grain.

It has been reported by several county extension ag educators that producers with stocker calves intend to graze out what little forage they have due to the high costs associated with harvesting. Harvesting costs range from anywhere between twenty and thirty dollars/acre. Thus, in many instances, it is not worth the additional cost for such small yield po-

Many southwest ponds and creeks are still completely dry.



tential, especially if a producer is raising valuable calves on that wheat pasture.

In conclusion, the future precipitation prognosis depends on which time-horizon one is looking at. There are very small rain chances in the eight-to-fourteen day National Weather Service forecast for much of Southwest Oklahoma, which covers the latter portion of the crucial development period for wheat. The thirty day NWS forecast shows rain chances for the area to be average, which is not all that helpful in determining seed bed moisture prospects for spring crops.

Long-range (90 to 120 day) forecasts are showing a better-than-average probability for the development of El Niño conditions in the Equatorial Pacific, which would provide much needed rainfall across Southwest Oklahoma and benefit summer crops considerably. However, the certainty of the formation of an El Niño is still up in the air, and, if one does develop, it is purported to be relatively weak. These factors combined make for a better-than-average chance that drought will persist in Southwest Oklahoma through the spring, with drought prospects through the summer highly uncertain.

Many meteorologists believe long-term drought conditions will persist the next few years, similar to drought conditions seen in the 1950s. This will of course have profound implications for the area's entire ecosystem, which cropland and rangeland are a part of. Regardless of future precipitation prospects, it is clear the ongoing drought in Southwest Oklahoma has had both acute and long-lasting effects on farms in the area, which has redefined production and marketing strategies on the part of ag producers.

Transportation Access & Planning

Highways

Highway infrastructure in the SWODA Economic Development District (EDD) is adequate with a good network of primary and secondary roads. Interstate Highway 40 runs east and west through Beckham, Custer and Washita counties located in the northern part of the district. U.S. 62 runs east and west across Jackson and Harmon counties in the southern part of the district. Two state highways running north and south through the district have been partially developed into four-lanes in recent years: State Highway 6 from Elk City to Altus, and State Highway 183 from Clinton to Snyder.

Airports

The area has 13 general aviation airports which are considered all civil aviation operations other than scheduled air services and non-scheduled air transport operation for remuneration or hire. General aviation flights range from gliders and powered parachutes to corporate jet flights. General aviation covers a large range of activities, both commercial and non-commercial, including flying clubs, flight training, agricultural aviation, light aircraft manufacturing and maintenance. The district also has Altus Air Force Base and the Oklahoma Spaceport which contains one of the world's largest runways.



The Oklahoma Spaceport is home to one of the longest runways in North America. It is 13,503 feet (4,116 meters) long and 150 feet wide (46 meters).

Railroads

One Class I railroad serves the area. The BNSF, located in Jackson County, is a 100-mile property composed of a former UP branch line and a Rock Island line operating in Texas and Oklahoma. The railroad interchanges with the UP and BNSF in Wichita Falls, Texas. Shipments are predominantly grain, chemicals and agricultural products.

The area is served by three Class III lines known as short line railroads. These three lines provide service to areas within the district and State of Oklahoma. The three Class III short lines and the Class I line provide the area access to east-west and north-south gateways for freight and raw material transportation.

Portions of the Class III line track can only support limited movement (five-car limit on hazardous commodities) at low speeds (less than 10 mph) and less than optimal weights. While this type of rail service is sufficient to meet modest shipping needs of existing agricultural customers, it hampers any opportunity to bring new, large-scale business to the area. Recent oil and gas exploration in western Oklahoma highlights this fact because the existing rail service is incapable of meeting the future demands for oil.

Recent improvements upgraded 49 miles of state-owned, Class III freight rail line to meet the needs of multiple shippers and to benefit the oil and gas sector between Sayre and Clinton. Improvements should also result in the railroad being able to supply faster and cheaper shipping services for new agriculture and manufacturing businesses for decades to come. It should greatly reduce truck traffic, and thus reduce emissions, lower maintenance costs to the highway system and greatly improve safety overall.

In addition to the transportation benefits, it also results in numerous benefits to the surrounding communities and the State of Oklahoma through increased tax revenue, increased employment and a rise in overall business activity as the market needs of incoming workers are met.



Transportation Planning

In 2012, SWODA created the Southwest Oklahoma Rural Transportation Planning Organization (SORTPO). The primary goals of the SORTPO include enhancement of rural transportation system connectivity, promotion of rural mobility/congestion relief and enhancement of rural transportation safety.

Rural transportation planning is a collaborative process designed to foster participation by interested parties, such as businesses, community groups, elected officials and the general public, through a proactive public participation process. Emphasis by the Federal Highway Administration (FHWA) and Federal Transit Administration (FTA) is placed on extending public participation to include people who have been traditionally underserved by the transportation system and services in the district.

The transportation planning process involves both long-term transportation system objectives and short-term implementation of projects and will provide a blueprint for the development of a safer, more efficient and less congested transportation network between population centers. Long-term objectives will be identified and documented in the rural transportation planning process. The identified planned transportation improvements will be implemented within the next 20 years. Steps will be taken to determine what short-term projects can be completed within the next five years. When complete, the SORTPO Rural Transportation Plan will represent ODOT's long-term transportation goals for rural areas of the state.

Street Resurfacing.

Economic Development Investments



Increased water storage capacity.

Economic Development Investments in the District for 2009-2013

Economic Development investments in the district totaled almost \$265,000,000 between 2009-2013. Most of these investments were financed by private sources estimated at over \$172,000,000. The majority of private investment was in buildings for retail (including two Walmart Supercenters), industrial facilities and equipment (mostly oil field services), lodging (five hotels), and entertainment/tourism.

Local governments invested more than \$55,000,000 in public infrastructure and capital improvements. Projects ranged from water system improvements, fire departments, city hall construction, event centers, school improvements and four new industrial parks.

Federal funding sources invested over \$20,000,000 in matching funds for infrastructure investments, while state sources were approximately \$16,500,000. The Federal and State sources of funding were generally matched with local government funding for infrastructure investments, however, numerous local government projects were completed with no federal or state assistance. The public financed infrastructure investments in many cases helped incentivize investment from the private sector. Adequate roads, public facilities and services provided assurances or required public infrastructure to allow the private investment to be viable.

These public and private investments have produced 1,500-2,000 direct jobs within the district and many of the investments have indirectly produced additional jobs and other smaller private investment.



Drainage and road improvements for industrial parks.

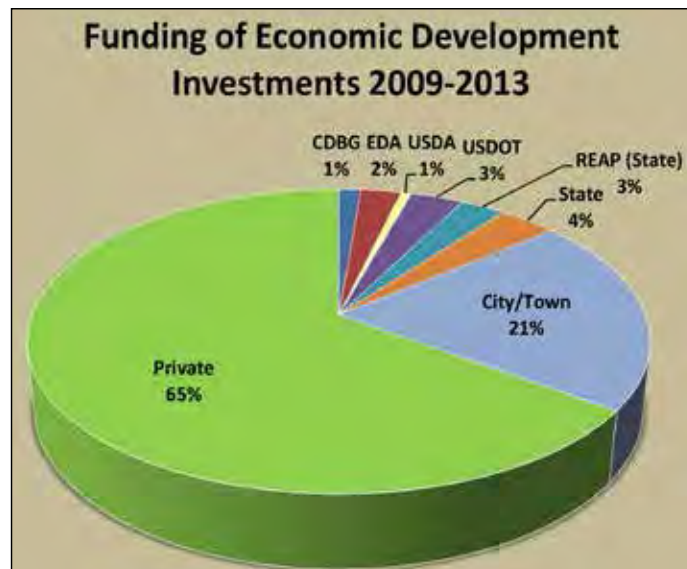


Drainage and road improvements for industrial parks.

Investment Highlights

Holiday Inn Express at Clinton opened its Water Zoo Indoor Waterpark in September 2012. The 28,000 square foot indoor waterpark features a movable roof that opens to the warm air of summer and closes when it's cold or raining. Retractable roofs are the ideal for year round indoor-outdoor waterparks. Revenues are never dependent upon the weather, which eliminates cancellations and greatly increases profitability. Water Zoo is open to both hotel guests and locals.

Weatherford, Elk City, Hobart and Sayre Industrial Parks are now providing much needed space to allow private investment by mostly oil field services related companies to establish new business locations or expand operations. These industrial parks combined are providing more than 500 acres of space for businesses to grow. Industrial park expansions were viable for the cities because of investments totaling \$6.5 million by the Economic Development Administration (EDA) matched with over \$3 million of local government funding. These industrial park improvements have resulted in 750-1,000 direct jobs.



Multi-million bridge construction project across the Red River in Harmon County is a asset to the local agriculture industry. The bridge is located on the termination point of old Hwy 30. The \$7.2 million project was a partnership with the Texas Department of Transportation and Circuit Engineering District #7.

The Shortgrass Community Heath Center in Hollis was made possible by a Federally Qualified Health Center Grant. The center provides dental, medical and behavioral services on a sliding pay scale.

Elk City Water System Improvements: In the last six years, Elk City has completed several water projects. A \$9,000,000 project involved new 24" water line from the plant to the city. An investment of \$6,000,000 in the construction of a new water plant and to refurbish three water towers.

Sayre to Clinton Railroad Improvements: Recent technological advances in the extraction of oil and gas have created a unique challenge for many American companies—how to move vast quantities of crude oil without pipelines in place to handle the volume and without generating an endless stream of heavy truck traffic clogging and degrading local, often rural, roadways. By tapping into the network of existing rail lines in Oklahoma, companies have a safe, efficient and cost-effective way to move their product to market—a “rolling pipeline.”

The State of Oklahoma was awarded a TIGER grant from the U.S. Department of Transportation to upgrade 49 miles of state-owned track, running from Sayre to Clinton. This \$8.5 million project engineered a package of track upgrades and yard expansions between Sayre and Clinton that will allow customers to move large volumes more quickly and less expensively by rail. The rail line will also then be capable of meeting new or expanding business needs such as agriculture and manufacturing.



Shortgrass Community Health Center provides local medical care to the Hollis area.

Other Significant Investments

(list noninclusive)

- Weatherford Fire Department
- Clinton Fire Department
- Weatherford/SWOSU Event Center
- Elk City – City Hall Administration Building
- Altus – City Hall and Police Station Building
- Weatherford – Walmart Supercenter
- Elk City – Walmart Supercenter
- Sayre – C&J Energy Services
- Weatherford Devon Energy
- Elk City — New Class D Landfill
- Elk City — Permitting New Class C/D Landfill



Saferoom at Weatherford Public Schools.



Brush Fire Truck purchased with REAP grant funding.



Tornado sirens for public safety.

Economic Clusters

An economic cluster is a group of activities located in a similar geography, which work together through all stages of production, from inputs (including goods and services) to outputs. Cluster-based economic development targets investments to conform to the strengths of the district or to develop interdependent, growth-oriented enterprises in the regional economy.

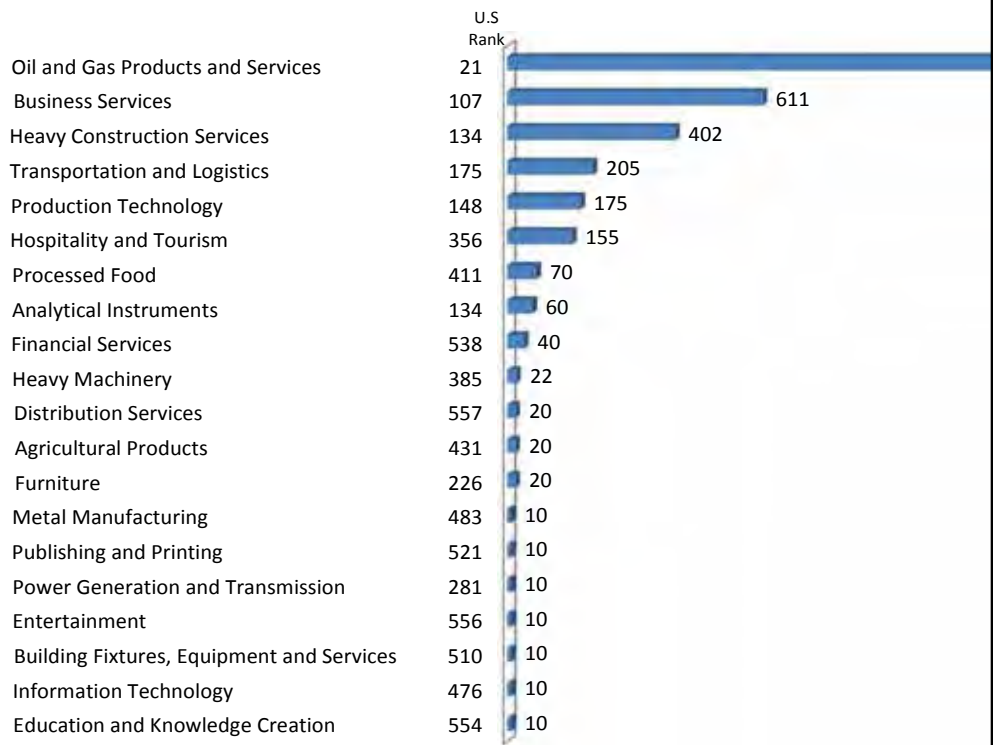
Economic clustering allows industries to draw from like resources in terms of available workforce (and the skill sets of workers), as well as knowledge-based resources and to leverage mutual benefits that exist between potential competitors in a region.

By targeting investments in workforce development to create a reliable source of workers with the skills necessary to do business, communities can create an environment favorable to those industries.

Also, by developing the regional economy in a way that induces clustered-support networks (in terms of available materials, services and specialists), industries are able to more efficiently access the services needed for the conduct of business. Additionally, by locating industries in close (or closer) proximity to one another, industrial sectors can benefit from an exchange of knowledge that results from the techniques of neighbors.

By investing in competitive clusters, regions can add insulation against economic downturns in important industrial sectors, reinforcing against losses resulting from competitive advances such as the advent of new technologies.

**Elk City, OK Micropolitan Statistical Area
Employment by Traded Cluster, 2010**



The Elk City Micropolitan area ranked 21st in employment within the oil and gas products and services cluster. Between 2001-2010, 869 jobs were created in this cluster alone, but the benefits of this cluster's growth can also be seen affecting growth in other clusters within the district.

Even as the national economy was in a recession, the energy boom affecting employment in the Elk City area advanced job growth in business services, transportation and logistics, production technologies, and heavy construction outpacing (or opposite) national trends.

Cluster data is unavailable for the Weatherford micropolitan area, but one could easily project that economic growth is occurring there as well due to the oil and gas products and services cluster (although slower than in Elk City).

Economic Development— Challenges, Opportunities, Goals & Objectives

Challenge/Opportunity #1

Existing infrastructure is inadequate for development because of condition/age, improvement cost or restrictions (environmental, geographical, & regulatory). The communities' inability to improve or grow their infrastructure impedes economic growth.

GOAL

The goals of economic development cannot be segregated from community development objectives. To support economic development and to provide employment, wage and private investment opportunities, the district must consider its community development agenda.

Regional and local partners must promote responsible planning/zoning, housing initiatives, transportation and other infrastructure developments that are conducive to producing economic opportunities.

OBJECTIVES

1. Increase the use of responsible planning/zoning to direct the use of limited resources.
2. Promote public/private partnerships to reduce the cost burden of development.
3. Explore housing development opportunities to improve the conditions of existing housing and increase the supply of affordable housing.
4. Explore conservation and re-use efforts to conserve natural resources.

STRATEGY

1. Planning/Zoning: SORTPO, CIP, Codes, County, City, Economic Development Strategic Plans.
2. Educate public officials on the benefits of partnerships, increase awareness of private investment opportunities, and mediate the process of partnerships.
3. Increase awareness of community improvement activities addressing housing quality and value, and develop a model for affordable housing development.
4. Educate general public on conservation needs and efforts.

Considerations

1. Age of Infrastructures: water, sewer, electric, high-speed Internet, lack of housing.
2. Cost: willingness or ability to expand or upgrade prior to commitment of development impedes the development. Conversely, entities can't afford to make upgrades that don't pay off. The amount of time it takes to make infrastructure improvements (due to cost) is too long for companies to wait.
3. Environmental Restrictions: drought affecting crops and water supply concerns.
4. Geographical Restrictions: land-locked cities, cost of surrounding land doesn't allow ability to develop even if it's available to acquire.
5. Regulatory Restrictions: high cost of improving infrastructure that meet all the requirements of governmental bodies.

Regional goals and objectives are designed to guide the actions and priorities of development. They provide an unified, coordinated approach for economic growth and stability and build upon the unique assets and abilities of the district to address challenges and/or maximize opportunities.

Challenge/Opportunity #2

Economies within the district are too reliant upon the oil and natural gas production industry cluster, government spending and agriculture.

GOAL

Diversify economies throughout the district to minimize the impact of downturns in industry clusters, reductions in government spending and the volatility of the agriculture industry.

OBJECTIVES

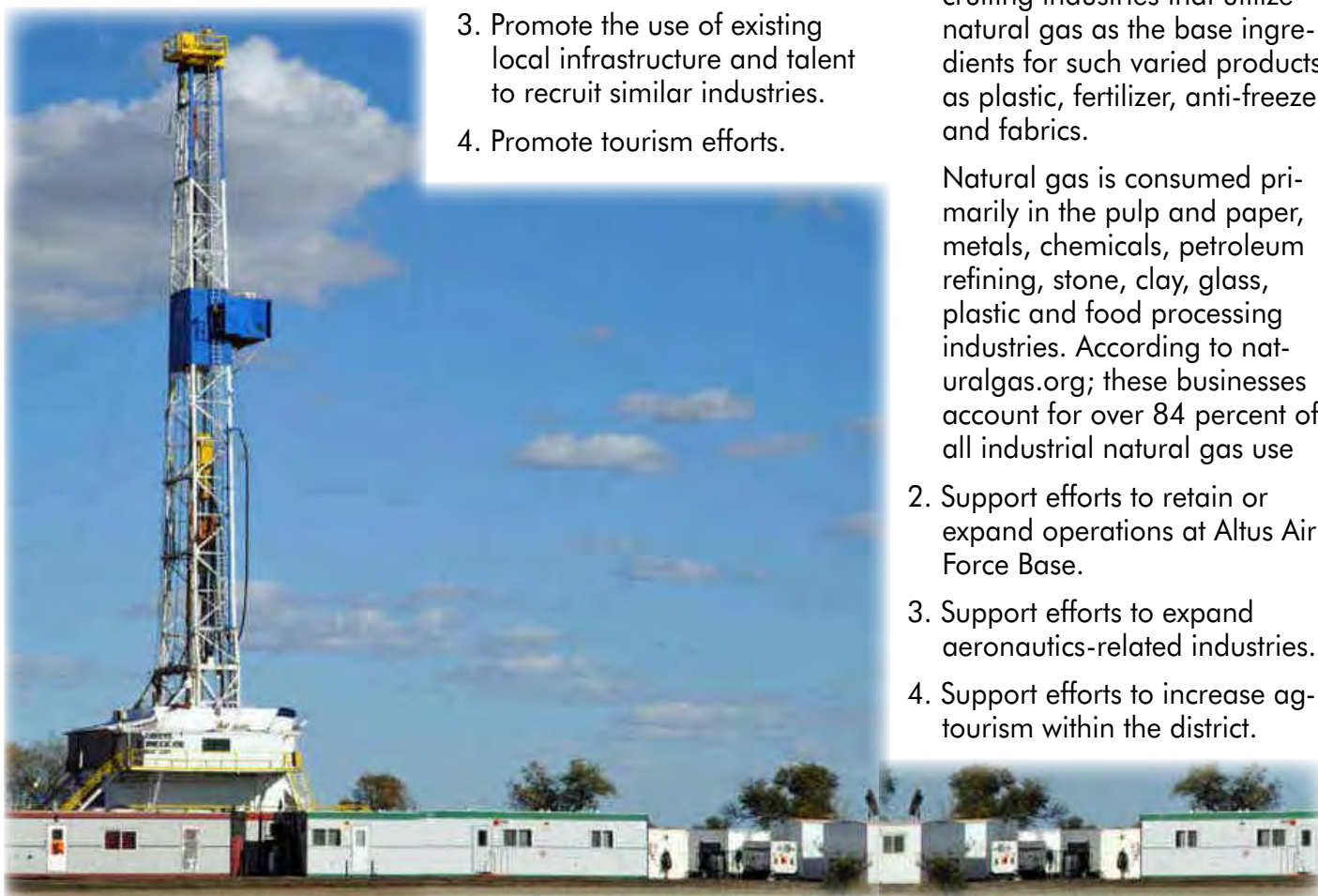
1. Expand value-added opportunities not tied to the cluster specific expansion or contraction.
2. Promote the recruitment of industries that utilize local natural resources.
3. Promote the use of existing local infrastructure and talent to recruit similar industries.
4. Promote tourism efforts.

STRATEGY

1. Explore opportunities for growth of industries that use natural gas produced in the district including electricity production and exportation. Opportunities such as recruiting industries that utilize natural gas as the base ingredients for such varied products as plastic, fertilizer, anti-freeze and fabrics.

Natural gas is consumed primarily in the pulp and paper, metals, chemicals, petroleum refining, stone, clay, glass, plastic and food processing industries. According to naturalgas.org; these businesses account for over 84 percent of all industrial natural gas use

2. Support efforts to retain or expand operations at Altus Air Force Base.
3. Support efforts to expand aeronautics-related industries.
4. Support efforts to increase ag-tourism within the district.



Challenge/Opportunity #3

Lack of quantity and quality workforce (or perception) to support business expansion, retention and location efforts. Finding qualified employees can be difficult, especially in counties where the unemployment rate and/or population are low.

GOAL

Improve skills within the existing workforce and the pipeline of talent that our educational system produces to attract or retain industry.



OBJECTIVES

1. Document the abilities and skills of our existing workforce and educational talent.
2. Make filling employment opportunities faster and easier by providing employers the opportunity to search for job seekers and reach out to them directly through workforce system.
3. Improve the usage of untapped workforce that currently has barriers to employment.
4. Population/workforce recruitment.
5. Prioritize jobs or skills that grow other employment opportunities. (Example: CDL)

STRATEGY

1. Achieve designation as a Work Ready Community to gain an advantage when competing to retain, grow and attract talent.
2. Increase use of career counseling and pathways in K-12 to prepare students for work and/or college readiness.
3. Organize initiatives to address the skills gap and change perception of manufacturing jobs.
4. Increase awareness of workforce system resources by putting the power in the hands of employers.
5. Explore efforts to better utilize growing Hispanic population in the workforce and assist employers, employees, communities and schools with resources to improve communications barriers.
6. Review daycare issues with interested partners and share proven solutions with employers, schools and nonprofits, and to increase public awareness.
7. Explore opportunities to help overcome barriers to obtaining drivers licenses (Regular and CDL).
8. Explore partnership efforts to recruit population/employees to the district including recruitment of veterans.
9. Work with adult basic education sites in area to motivate high school dropouts to attain GEDS.

Considerations

1. There is a low, post-secondary (college and career tech) graduation rate in our area, as well as across the state. Most self-sustaining jobs—especially outside the oil and gas industry—now require some sort of certification or diploma.
2. Employers continue to complain of poor “soft skills,” but do not expect to provide on-the-job training for those skills. They must be acquired prior to work entry for employers to consider applicants job-ready.
3. Other barriers to employment, such as lack of housing and child care, make it difficult to recruit employees from other counties/states to our area.
4. People with felonies are limited in job opportunities and government resources.
5. There is an “untapped” employee pool in southwest Oklahoma consisting of high school dropouts. GED attainment for this group would help increase the pool of entry level employees for local employers.

Community & Private Sector Involvement

Strong regions are fostered through leadership, volunteerism and community involvement including leadership development, volunteer recruitment, retention, training and recognition programs. One of the goals of the CEDS process is to encourage cooperation, open lines of communication and coordination through regional, community-wide approaches to meet needs in all areas of community and economic development. Community and private sector participation is vital to the development

of an effective and relevant CEDS process including the process of implementing a CEDS.

The SWODA Economic Development District maintains partnerships with a wide variety of local and regional organizations that may have an interest in economic development. This includes local governments, chambers of commerce, economic development organizations, workforce development entities, institutes of higher education and others.

STRATEGIC PROJECTS, PROGRAMS AND ACTIVITIES

1. Continuation of infrastructure development is crucial throughout the district. Government and private investments will be crucial to the continued long-term economic success of the region. The district will continue to work with local governments to compose projects and when necessary, seek assistance from State and Federal partners.
2. Provide assistance which will be conducive in increasing the quantity and quality of available employment opportunities through entrepreneur development and education. This effort supports small/medium-sized businesses and provides them with resources and a support network.
3. Promote regional collaboration with the development of community-based local economic development strategic plans. As multiple plans are developed and similar needs/gaps are discovered throughout the district, we will work to bring communities, partners and the private sector together to address issues that are beneficial to all parties. These collaborations will hopefully foster public-private partnerships with business leaders and public representatives to form the most viable solutions for all parties.

LEAD ORGANIZATIONS AND RESOURCES

SWODA in coordination with the following organizations and institutions and many other groups, agencies, and individuals strive to meet the strategic activities listed above. Following is a summary of partners and resources.

Southwest Oklahoma Workforce Investment Board (WIB)

Local Workforce Investment Boards, in partnership with local elected officials, plan and oversee the local workforce system. Local plans are submitted for the Governor's approval. The Boards are designed to build and maintain a high quality workforce for Oklahoma by:

- 1) Determining current and future workforce needs, and ensuring that those needs are met;
- 2) Promoting a high level of awareness between the state's employers and the workforce development system about workforce needs and the importance of investing in the development of their own workforces.

SWOSU Center for Economic and Business Development

The Center for Economic and Business Development at Southwestern Oklahoma State University has been designated as a University Center by the Economic Development Administration of the U.S. Department of Commerce. The University Center provides economic development assistance to local governments, businesses, and industry and to economic development districts and organizations in the southwest quadrant of Oklahoma. They serve the 15 rural counties of southwest Oklahoma and specialize in financial assistance and veteran assistance.

The University Center provides technical assistance to communities and the private sector through consensus based strategic planning, grant writing assistance, loan application assistance and market analysis. The mission of the Oklahoma SBDC is to provide quality one-to-one business counseling,

economic development assistance, and training to small businesses.

In the area of applied research the University Center conducts surveys and analysis of business and industry in the project area to identify technical assistance needs. The University Center coordinates operations and activities with its primary partners: (Western Oklahoma State College, Cameron University, University of Science and Arts of Oklahoma, Redlands Community College, South Western Oklahoma Development Authority and the Association of South Central Oklahoma Governments). The University Center is committed to assisting Southwest Oklahoma to help increase productivity, spur innovation and entrepreneurship, and increase long-term regional competitiveness and economic diversification.



USDA Rural Development

Rural Development provides federal loans and grants through programs designed to improve the quality of life for rural Americans. These programs work to deliver affordable housing to eligible applicants, they help to create jobs through the startup or expansion of businesses, and they ensure that rural communities have access to modern infrastructure. Increasing access to broadband technology, constructing water and wastewater facilities or partnering to provide essential community services such as schools, libraries, hospitals and day care centers are examples of the types of projects. As of December 31, 2013, Rural Development's portfolio totaled \$197 billion, nationwide.

In Beckham, Custer, Greer, Harmon, Kiowa, Jackson, Roger Mills and Washita counties, approximately \$65 million has been invested over the last five years to provide affordable housing. In addition to providing funds for the purchase of a new or existing home, certain Rural Development Single Family Housing programs are utilized to make repairs to existing homes. In the last five years, over \$150,000 has been invested in repairing properties for eligible applicants in these counties.

During this same period of time, several businesses, throughout this eight-county area, shared \$167,000 in grants through the Rural Energy for American Program. Investments through this program help successful applicants to make energy efficient improvements.

Many times, communities lack the resources to construct essential community facilities or meet their need for water or wastewater treatment. One example of Rural Development's Water and Waste programs at work in Southwest Oklahoma can be found in Thomas, Oklahoma where Rural Development programs were tapped to provide a \$4 million loan/grant package to the Thomas Public Works Authority to meet a critical need for the residents of the area.

These are just a few examples of how Rural Development programs have played a key role in supporting economic development in rural Oklahoma. Looking to the future, USDA Rural Development is excited about the opportunities that the new Farm Bill will bring

Stronger Economies Together (SET) Western OK I-40 Corridor

The Western Oklahoma I-40 Corridor consists of communities working together to improve the region's economy. The region includes 108 miles of Interstate Highway 40 that parallels historic Route 66 through Caddo, Custer, Washita and Beckham counties.

Five goals have been adopted to capture the most benefits for the region. They are as follows:

1. Re-establish and expand the aerospace industry.
2. Create diversified agriculture and value-added projects.
3. Expand the energy sector through diversification and recruit administration.
4. Improve healthcare facilities, staffing and technology.
5. Develop amenities that will support strong community lifestyles.

Kiwash Electric Cooperative, Inc.

Kiwash Electric Cooperative, Inc. is an active player within the economic development arena in west-central Oklahoma. This organization actively recruits business and industry to the region as well as works on business retention issues. Their expertise lies with financial packaging, business plan development and site selection. An experienced economic development team awaits any relocating industry with multiple site locations in several counties in western Oklahoma.

Kiwash Electric Cooperative, Inc. has established an industrial and business revolving loan fund. In 1995 and again in 1997, the Board of Directors filed for and received two federal grants to fund a revolving

loan fund. The reason for this perpetual revolving loan fund is rural job creation. As these original loans were paid back, then we are able to lend these funds to other businesses and industries.

The Kiwash Revolving Fund, which was jointly funded via the USDA Rural Economic Development Loan and Grant (REDL&G) program and Kiwash Electric Cooperative, has financed such job creating activities as manufacturing, printing, retail and aerospace projects over the years. This program has created over 130 full time and part-time jobs in the region. Kiwash has been serving portions of Washita, Custer, Kiowa, Dewey and Roger Mills counties for over 75 years.

Oklahoma Manufacturing Alliance

The mission of the Oklahoma Manufacturing Alliance is to provide strategic assistance to manufacturers to help them become successful innovators in the global marketplace. Oklahoma Manufacturing Alliance is consistently among the top 5 percent of 60 Manufacturing Extension Partnership (MEP) centers for impact per federal dollars spent, and they have been the #1 performing MEP center in the nation for the past two years. Southwest Technology Center in Altus is their local sponsor in the district.

Oklahoma has a network of 17 Manufacturing Extension Agents, five Applications Engineers, and OSU's New Product Development Center delivering non-fee A-to-Z services to 4,000 manufacturing companies and individuals. They assess needs, identify resources and deliver solutions. Scope of services is broad: cus-

tomers-focused products/markets innovation; engaged workforce acquisition, development, and retention; systemic continuous improvement; supply-chain management and collaboration; green/sustainability; global engagement; financial analysis, capital resourcing and state incentives.

More than one in seven private sector jobs depend on the US manufacturing base. This multiplier has a powerful impact on local economies. Ten percent of state's workforce is employed in manufacturing (135,000 employees) generating 12% of the state's economy (Agriculture generates 1.7% of Oklahoma's economy). Ninety percent of manufacturers employ fewer than 50 workers; 9% of manufacturers employ between 50 and 250 workers; and about 35 manufacturers employ more than 500 workers.

Conservation Districts

Conservation districts are legal subdivisions of state government, whose primary goal is to assist citizens in practicing wise use and management of the state's renewable natural resources, especially its soil and water. Conservation districts continue to assist farmers and ranchers as in the past, but today also assist a larger segment of the public including community planners, public health officials, developers and rural and urban citizens. Districts also provide a variety of education materials and opportunities for students, and some lease or provide equipment to local landowners. The nine conservation districts located in the Southwest Economic Development District include as follows:

- Upper Washita Conservation District
- North Fork of the Red River Conservation District
- Custer County Conservation District
- Deer Creek Conservation District
- Washita County Conservation District
- Kiowa County Conservation District
- Greer County Conservation District
- Jackson County Conservation District
- Harmon County Conservation District

Oklahoma Agritourism

The Oklahoma Department of Agriculture, Food and Forestry has worked with agritourism venues in the Southwest Economic Development District including the Buffalo Creek Lodge & Guide Service, the Farm and Ranch Museum, Flying W Guest Ranch, Washita County Museum and Old Town Museum, to promote rural economic development. Companies registered with the Made in Oklahoma program include Christy Michelles and Holder

Brothers Beef, both from Altus; Keith's Butcher Shop from Elk City; Pure Beef, Lone Wolf; Snider Farms Peanut Barn from Hollis; The Goat Farmer's Wife from Thomas; Heart of the Prairie Candles; Wild Prairie Soap; Yippee Ay-O-K Winery Tasting Room and Gift Shop, all from Clinton. Ed and Debbie Crall from Thomas, owners of Goat Farmer's Wife, received a grant to build a kitchen and facility to make, cure and sell their line of soaps.

Public Service Company of Oklahoma (PSO)

PSO has long been a supporter of Economic Development. The PSO ED Team partners with organizations to promote Oklahoma at events such as the American Wind Energy Association Conference and the Association for Unmanned Vehicles Systems, International Conference. In addition to a strong marketing and recruitment initiative, PSO provides:

- Mini-grants to community ED organizations to support specific economic development activities or projects for attracting and retaining base employment jobs.
- Scholarships to attend select Economic Development Training
- An annual Economic Development Training or Forum for community economic developers and community leaders

- Assistance and sponsorships for hosting regional site location events
- Assistance in marketing available buildings and sites
- Support for workforce development programs and other business retention programs
- Customized community assistance
- Location One - ESRI Data and GIS Mapping

In addition PSO's parent company, AEP, has an economic & business development team that promotes AEP's 11-states nationally and internationally and also provides research tools and programs to assist PSO communities.

Oklahoma Cooperative Extension Service

Oklahoma Cooperative Extension Service county educators and area, district and state specialists develop science-based educational programs to help Oklahomans solve local issues and concerns, promote leadership and manage resources wisely. There is a OCES office located in all 77 counties.

Programs focus on the following:

- Increasing opportunities for agricultural enterprises
- Natural resources and environmental management
- Food, nutrition, health and safety education
- Youth, family and community development



Southwest Oklahoma Impact Coalition (SOIC)

SOIC is a voluntary association that consists of the following entities:

- Five Universities
 - Southwestern Oklahoma State University
 - Western Oklahoma State College
 - Cameron University
 - University of Science and Arts of Oklahoma
 - Redlands Community College
- Six Technology Centers
 - Great Plains Technology Center
 - Red River Technology Center
 - Canadian Valley Technology Center
 - Caddo Kiowa Technology Center
 - Southwest Technology Center
 - Western Technology Center

- Two Regional Council of Governments
 - Association of South Central Oklahoma Governments
 - South Western Oklahoma Development Authority

The mission of the coalition is to reinforce and help grow wealth in the state's southwest quadrant by maximizing and coordinating workforce and economic development opportunities through a collaborative process.

SOIC priorities are as follows: 1. workforce development; 2. education and skill training; 3. economic and business development; 4. workers' compensation; 5. intermodal transportation; 6. broadband and wireless services; 7. healthcare; 8. child care for working families; 9. water resource planning and development; and 10. public utilities and facilities.



Oklahoma Southwest Alliance (OSA)

A joint venture of business and civic leaders from communities throughout Southwest Oklahoma formed to improve the quality of life by identifying opportunities for sustainable economic growth, diversification, and stabilization. OSA is regional coalition of communities, counties, and residents working together to impact development and prosperity in Southwest Oklahoma.

OSA is a platform in which to launch new ideas and achieve new goals. OSA strives to support the business climate for future entrepreneurs, businesses, and industries. OSA represents a trade area for retailers and tourist alike.

Oklahoma Southwest Alliance is an organization willing to adapt to the changing global economy in business, agriculture, tourism, and culture.

Monthly, OSA educates community leaders and interested citizens on the finer points of economic and community development with a broad gambit of relevant topics.

Annually, OSA invites national site locators, industry leaders, and/or private investors to southwest Oklahoma for an exchange of mutual ideas in an effort to recruit businesses, investors, or industries to southwest Oklahoma.

The annual event has been held at Quartz Mountain Lodge and various other venues. The special event allows community leaders to interact with our national guests over two days of food, fun and fellowship. It is OSA's hope that the relationship building format will lead to greater economic advantage by attracting new business or industry to our portion of the state.

Resources

1. Business Finance:

| | |
|---|--------------------------|
| Business and Industry Loans..... | OIFA, USDA-RD, EDA, ODOC |
| Community Development Block Grant | (CDBG), ODOC |
| Rural Economic Action Plan (REAP) | State Appropriated Funds |
| Regional Development | EDA |

2. Public Works Infrastructure:

| | |
|--------------------------------------|-----------------------------|
| Water and Sewer System..... | USDA-RD, OWRB, EDA, REAP |
| Sewage Treatment | EPA/DEQ, EDA, USDA-RD, REAP |
| Streets and Highways | ODOT, EDA, REAP |
| Public Works Grants | EDA, CDBG, USDA-RD, REAP |
| Community Facility Grants/Loans..... | USDA-RD, CDBG, REAP |

3. Education and Training

| | |
|---|------------------------------------|
| Southwestern Oklahoma State University | Weatherford and Sayre, OK |
| Western Oklahoma State College..... | Altus, OK |
| Western Technology Center..... | Burns Flat, Sayre, Weatherford, OK |
| Oklahoma State University..... | Stillwater, OK |
| University of Oklahoma..... | Norman, OK |
| Oklahoma Municipal League..... | Oklahoma City, OK |
| Southwestern Technology Center | Altus, OK |
| WTC All-Hazard Regional Training Center | Elk City, |

4. Business Assistance

| | |
|---|---|
| University Center..... | SWOSU, Weatherford, OK |
| Small Business Development Center | SWOSU, Weatherford, OK |
| Business Assistance | Western Technology Center, Burns Flat, OK |
| Entrepreneur Development | SWODA, Burns Flat, OK |

5. Employment and Training

| | |
|--|-----------------------|
| Southwest OK Workforce Investment Board..... | Burns Flat, OK |
| Oklahoma Workforce Centers..... | Clinton and Altus, OK |

Future Projects

The following is a list of projects known to be under consideration as of the date of the CEDS document. This list is not meant to be all inclusive. Accuracy of this information may change as projects develop due to financial considerations or constraints.

Elk City “Big Elk” Industrial Park Project

This project addresses the limited growth space for industry in the Elk City area. The area has seen rapid growth in recent years due to the oil and gas industry and supporting businesses. The project includes improvements to 130 acres of land including grading, drainage, erosion control, paving, water and waste water system installation, street lighting, railroad spur and switches. The projected cost of the project is \$4.5 million. Estimated number of jobs in the facility upon full capacity is expected to be in excess of 1,500.

City of Clinton Industrial Park Project

This addresses the need for development space for companies with industrial and manufacturing growth needs. Clinton does not have adequate facilities for these types of industry to locate or grow currently within the municipality. The project includes improvements to 100 acres of land for commercial and industrial use. Improvements include earthwork, roadways, water and waste water system installation, and a waste water lift station. The projected cost of the project is \$1.5-\$2 million. Estimated number of jobs in the facility upon full capacity is expected to be 1,000-1,500.

City of Sayre Polyethylene Pipe Manufacturing Project

This project will be for the construction of a publicly-owned building to support the expansion of a subdivision of Milford Pipe and Supply Enterprises. The company will manufacture polyethylene pipe used in the oil and gas, municipal and industrial, farm/ranch, geothermal and water transfer industries. The projected cost of the project will be \$1.2-\$1.5 million. Estimated number of jobs in the facility is 65. This project is possible partly due to an EDA infrastructure investments that increased municipal water capacity.

City of Clinton Water Treatment Facility Project

This project is in the speculation stage at this point and time. The City has been working on alternative sources of drinking water as the main water source for the community, Foss Reservoir, has been drastically affected by an extended drought. The City is currently exploring multiple alternatives. This project would include the City drilling new water wells then treating the ‘hard’ water to use for consumption. The early estimated project costs exceed \$20 million. Project would potentially save jobs and allow for expansion of jobs, but there is no estimate.

Water and Wastewater Projects

Numerous smaller water and wastewater projects that address specific community needs allow for improvements and minor expansion of current systems. These infrastructure projects mostly affect the rehabilitation or repair of water systems. These improvements address quality of life, safety, and health issues within the communities. Projects range in size and scope. Time period 1-3 years. Projected costs \$2 - \$4 million. Project would potentially save jobs and allow for expansion of jobs, but there is no estimate.

Entrepreneur Development Projects

Increase local public awareness and cultivate a receptive environment throughout the district for Entrepreneurs, small, and medium sized businesses to remain, start-up, or expand. Enhance opportunities and competitive position for individuals, businesses, and local communities throughout the district.



Existing railroad between Erick and Sayre will look very different at the completion of the project.

Erick-to-Sayre Freight Rail Rehabilitation Project

This project involves the rehabilitation of a currently unused 15-mile rail corridor in Beckham County in western Oklahoma. The rehabilitation is intended to increase rail capacity and economic competitiveness in western Oklahoma and the nearby eastern Texas panhandle to help relieve the very high demand for truck travel, as well as the capacity constraints on pipelines and other rail facilities, due to energy extraction activities taking place in the Anadarko Basin.

This project will have an impact on local, regional, and national economic competitiveness by reducing rail shipping costs for oil shippers, farmers, and industry, allowing them to improve their logistics practices and expand markets for both domestic and international shipments. This will improve the competitive position of local agricultural and business enterprises, while reducing, somewhat, our nation's dependence on foreign oil sources.

The project is critical in making it possible to fully exploit the district's resources and maximize economic development potential for the region. The dampening effect of limiting rail traffic to current levels, while the truck driver labor shortage and the limitations on pipeline capacity make non-rail transportation more difficult, could greatly reduce the potential number of jobs and other benefits that would be possible if the project was in place.

These benefits are not just the jobs of those drilling and monitoring the wells, or driving the oil to the railheads, but the jobs at restaurants and stores that will serve these new energy-industry employees, or the builders who would construct their homes, etc. Estimated number of direct jobs 100-150. Cost \$2.5 million. Considerable indirect benefits

Appendixes

Executive Summary

The South Western Oklahoma Development Authority (SWODA) is designated as an Economic Development District (EDD) by the U.S. Department of Commerce, Economic Development Administration (EDA). Current members of the EDD are Beckham, Custer, Greer, Harmon, Kiowa, Jackson, Roger Mills and Washita Counties. The EDA provides financial assistance to designated districts in part, for the purpose of developing a Comprehensive Economic Development Strategy (CEDS), the region's economic road map to diversify and strengthen the regional economy.

The purpose of the CEDS is multi-faceted. The CEDS is designed to provide baseline information on demographics and economic data, development of strategies and identify potential projects within the region. Preparation and adoption of the CEDS maintains both the region's EDD designation and maintains grant eligibility for those participating units of government. Entities interested in applying for project grants under the EDA's Public Works and Economic Adjustment Programs must demonstrate how the investment fits into the regional CEDS.

The CEDS is a working document used by both the public and private sectors to provide leadership with a current picture of the economic state of the region. As a designated Economic Development District, SWODA is responsible for preparing and adopting a CEDS document at least every five years. The CEDS planning process is the result work of the SWODA CEDS Committee. SWODA provides the organizational structure for the formulation of the CEDS and serves as a regional coordinating body. The South Western Oklahoma Development Authority Comprehensive Economic Development Strategy is approved and adopted by the SWODA CEDS committee and the SWODA Board of Trustees.



Debora Glasgow, Executive Director
South Western Oklahoma Development Authority



2014 SWODA BOARD OF TRUSTEES

Chairman..... Mike Brown
Vice-chairman..... John Schaufele
Secretary..... Carl Don Campbell
Treasurer..... John Dee Butchee
Immediate Past Chairman..... Nicky Boone

BECKHAM COUNTY

(Terms expire 12/31/14)

Cities and Towns..... Eddie Tom Lakey
Conservation Districts..... Nelda Tucker
County Commissioners..... Carl Don Campbell*

CUSTER COUNTY

(Terms expire 12/31/14)

Cities and Towns..... Mike Brown*
Conservation Districts..... Burke Eagan
County Commissioners..... Lyle Miller

GREER COUNTY

(Terms expire 12/31/15)

Cities and Towns..... Curtis Bogart
Conservation Districts..... Bryant Reeves*
County Commissioners..... Steven Fite

HARMON COUNTY

(Terms expire 12/31/15)

Cities and Towns..... John Gallagher
Conservation Districts..... Geary Caswell
County Commissioners..... Nicky Boone*

JACKSON COUNTY

(Terms expire 12/31/15)

Cities and Towns..... Blake Roberts
Conservation Districts..... John Dee Butchee*
County Commissioners..... Cary Carrell

KIOWA COUNTY

(Terms expire 12/31/15)

Cities and Towns..... Tom Talley
Conservation Districts..... John Schaufele*
County Commissioners..... Tim Bingham

ROGER MILLS COUNTY

(Terms expire 12/31/14)

Cities and Towns..... Myrna Ashby
Conservation Districts..... Sterling Moore*
County Commissioners..... Ray Hughes

WASHITA COUNTY

(Terms expire 12/31/14)

Cities and Towns..... Alex Damon*
Conservation Districts..... Edie Brown
County Commissioners..... Leo Goeringer

AT-LARGE

(Terms expire 12/31/14)

At-Large Representative..... Chuck Dougherty*
At-Large Representative..... Damon Dunbar
At-Large Representative..... Guy Hylton
At-Large Representative..... Illando Sawyer
At-Large Representative..... Anita Archer
At-Large Representative..... Thedis Mitchell

*Executive Committee

Workforce Investment Board Roster & SWODA CEDS Committee

PRIVATE BUSINESS MEMBERS

BECKHAM COUNTY

Jon Merrifield, Merrifield Office Supply, Elk City
Brandon Storm, Storm Consulting & Engineering, Elk City
Vicki Hinkle, Northfork Corrections, Sayre
Misty Carter, Great Plains Regional Hospital, Elk City

CUSTER COUNTY

Ed Phillips, McDonalds, Clinton
Mike Hixson, PSO, Weatherford
Shea Meget, Consolidated Oilfield, Clinton
Nina Green, Sports Chassis Freightliner, Clinton
James Trusley, Bar S, Clinton

HARMON COUNTY

Bill Sparks, Shortgrass Community Health, Hollis

JACKSON COUNTY

Jennifer Bogle, Altus AFB, Altus
Gayle Ledbetter, KEYB Media, Altus
Sandra Cusher, Bar S, Altus
Denny Koenders, Altus Times, Altus
Jim Norris, Boeing, Altus

KIOWA COUNTY

Tom Talley, Talley & Talley Attys., Hobart

WASHITA COUNTY

Phil Kliewer, Cordell National Development, Cordell

MULTI-COUNTY

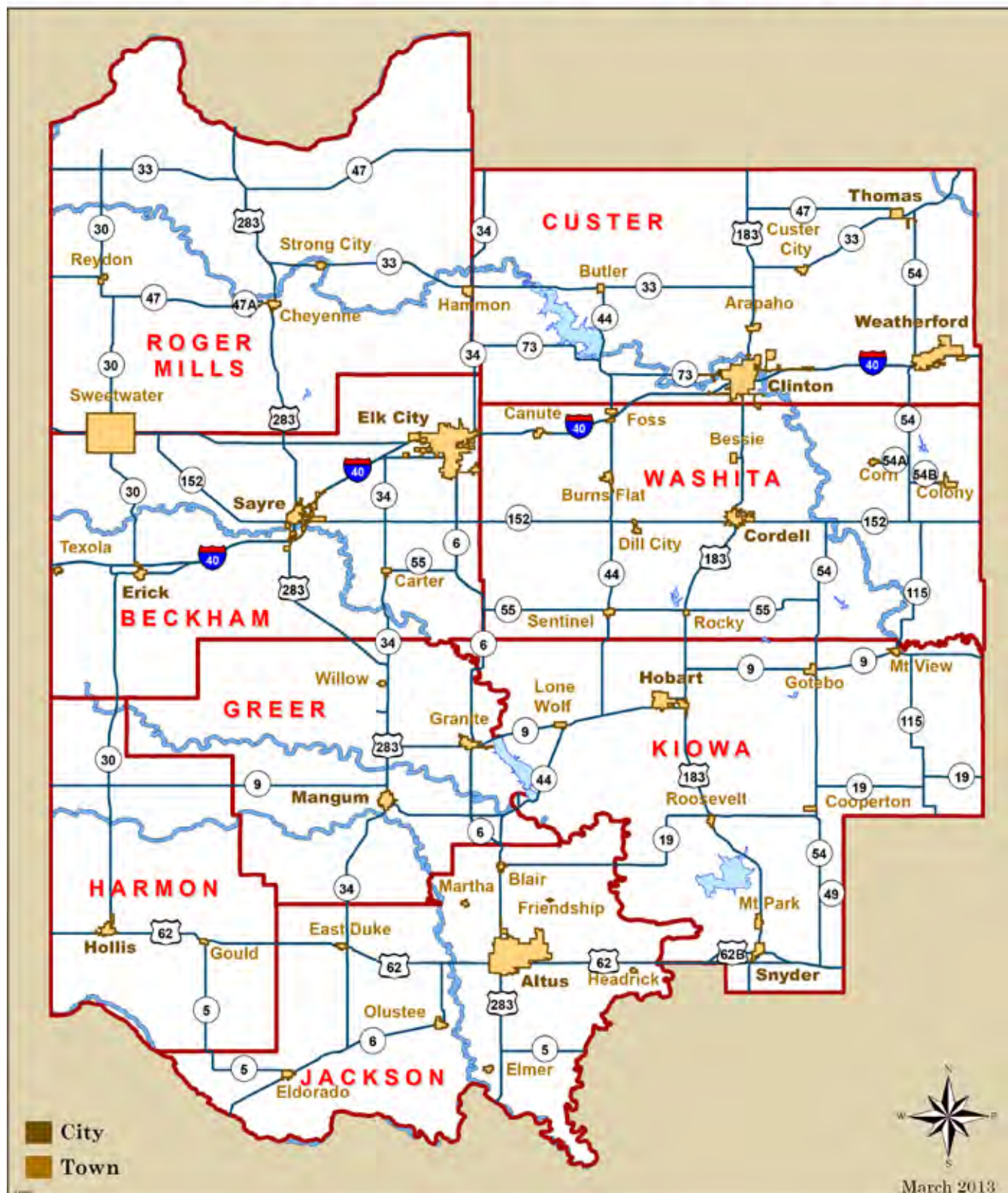
Bill Cunningham, Mfg. Alliance, Lawton office

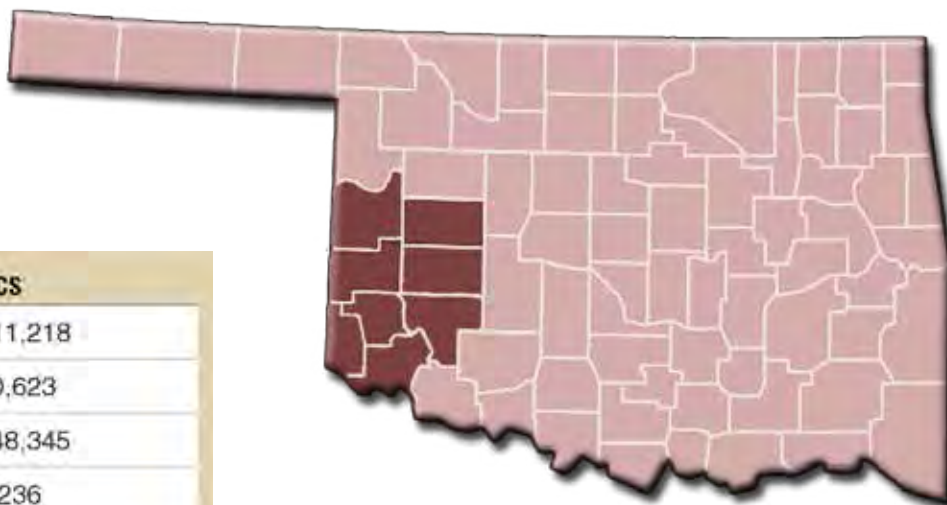
PUBLIC SECTOR MEMBERS

Michael Ryburn, SWODA
Tonya Worbes, DHS
Steve Crank, OESC
DeRoy Elledge, Adult Basic Ed
Dale Latham, Southwest Tech Center
Cheri Lou Gastineau, Western Tech Center
Tammie Jones, DRS
Tia Baker, ORO
Kelley Baker, SWOCAG
Phil Birdine, WOSC
Dewayne Wilcox, AFL-CIO
Dean Derieg, VFW
Alfred Miller, Washita 2000
Nicky Boone, Harmon Co. Commissioners
Tom Talley, Hobart Econ. Development
Tiffney Ratcliff, ASCOG

As of April 1, 2014

8 COUNTY REGION





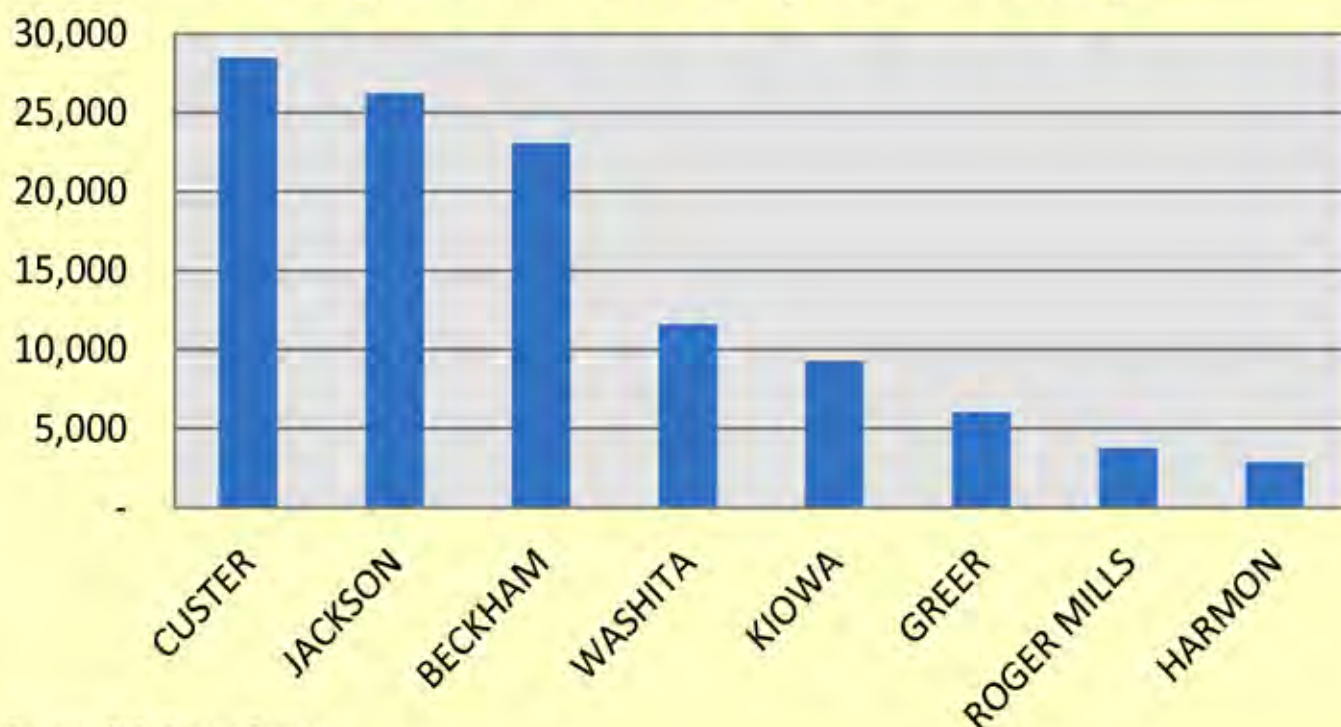
Overview of Economic Statistics

| | |
|-------------------------|-----------------|
| Population (2013) | 111,218 |
| Jobs (2013) | 40,623 |
| Average Earnings (2013) | \$48,345 |
| Unemployed (8/2013) | 2,236 |
| GRP (2012) | \$4,262,991,450 |
| Exports (2012) | \$8,519,022,894 |
| Imports (2012) | \$7,582,370,523 |

Source: Economic Modeling Specialists International

The area encompasses 7,011 square miles and is larger than Rhode Island, Connecticut, Delaware or Hawaii. The area is only slightly smaller than that of Massachusetts or New Jersey.

2012 Population by County



Source: U.S. Census Bureau

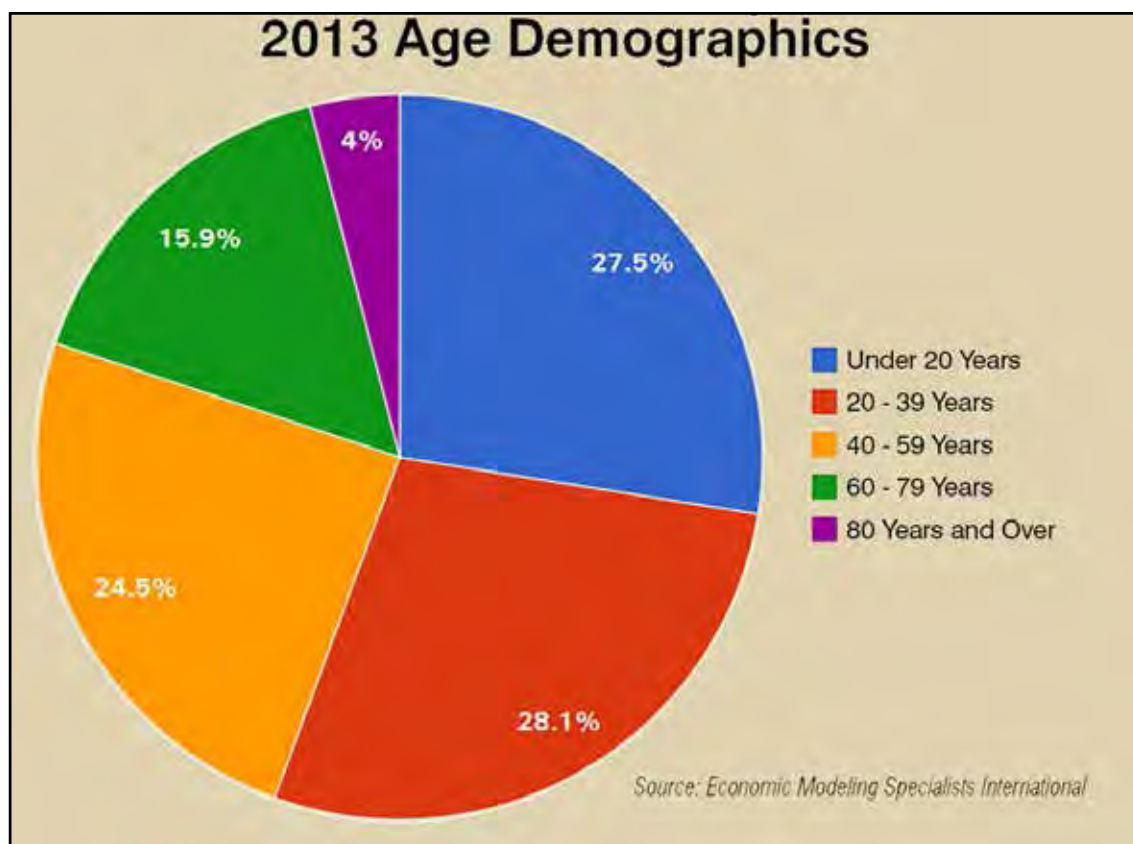
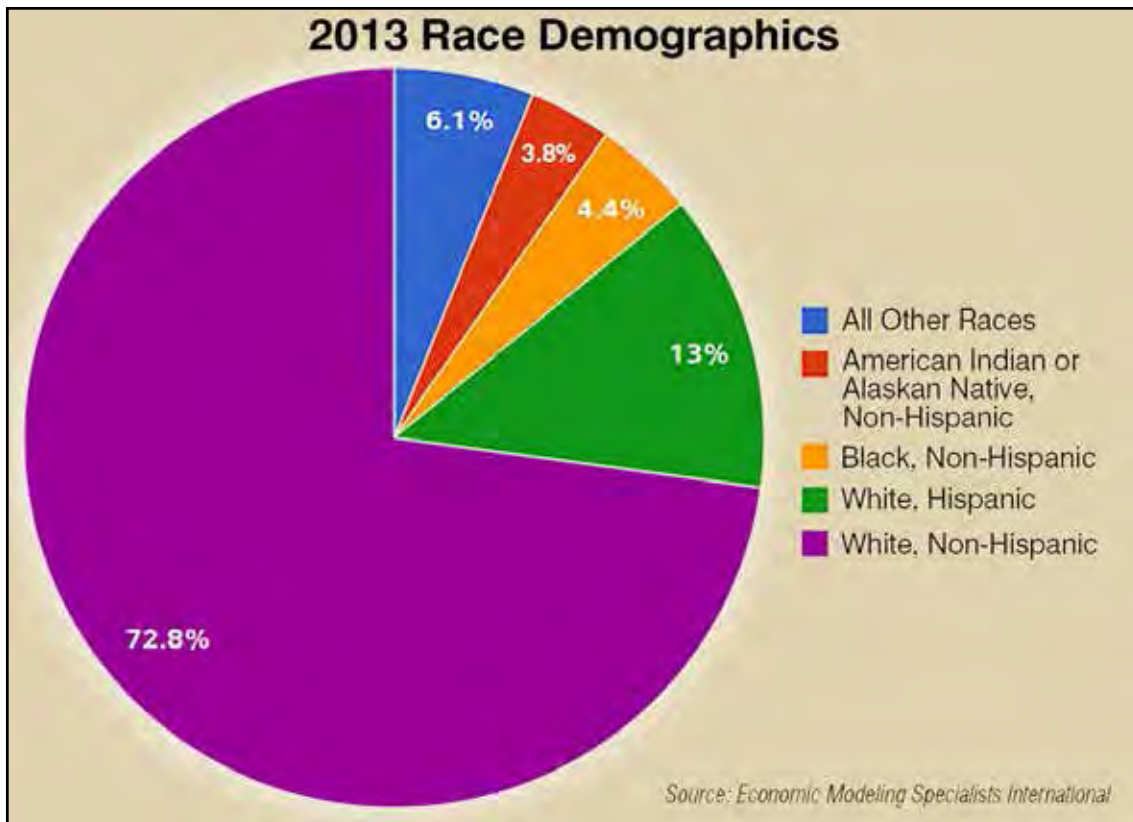
Population by Age Group

111,218
2013 Population
2.9% of State

1.7%
Population Growth for the Last 5 Years
State Growth 5.4%

| Age Group | 2013 Population | % of Population | |
|-------------------|-----------------|-----------------|---|
| Under 5 years | 8,040 | 7.2% |  |
| 5 to 9 years | 7,783 | 7.0% |  |
| 10 to 14 years | 7,272 | 6.5% |  |
| 15 to 19 years | 7,505 | 6.7% |  |
| 20 to 24 years | 9,113 | 8.2% |  |
| 25 to 29 years | 8,073 | 7.3% |  |
| 30 to 34 years | 7,627 | 6.9% |  |
| 35 to 39 years | 6,413 | 5.8% |  |
| 40 to 44 years | 5,903 | 5.3% |  |
| 45 to 49 years | 6,565 | 5.9% |  |
| 50 to 54 years | 7,540 | 6.8% |  |
| 55 to 59 years | 7,264 | 6.5% |  |
| 60 to 64 years | 6,220 | 5.6% |  |
| 65 to 69 years | 4,808 | 4.3% |  |
| 70 to 74 years | 3,701 | 3.3% |  |
| 75 to 79 years | 2,999 | 2.7% |  |
| 80 to 84 years | 2,183 | 2.0% |  |
| 85 years and over | 2,211 | 2.0% |  |

Data Source: Economic Modeling Specialists International



Population by City and Town

| | 2010 Total | 2000 Total | Number | Change % |
|-------------|------------|------------|---------|----------|
| Altus | 19,813 | 21,447 | (1,634) | -7.62% |
| Elk City | 11,693 | 10,510 | 1,183 | 11.26% |
| Weatherford | 10,833 | 9,859 | 974 | 9.88% |
| Clinton | 9,033 | 8,833 | 200 | 2.26% |
| | 51,372 | 50,649 | 723 | 1.43% |
| Sayre | 4,375 | 4,114 | 261 | 6.34% |
| Hobart | 3,756 | 3,997 | (241) | -6.03% |
| Mangum | 3,010 | 2,924 | 86 | 2.94% |
| New Cordell | 2,915 | 2,867 | 48 | 1.67% |
| | 14,056 | 13,902 | 154 | 1.11% |
| Granite | 2,065 | 1,884 | 221 | 11.73% |
| Hollis | 2,060 | 2,264 | (204) | -9.01% |
| Burns Flat | 2,057 | 1,782 | 275 | 15.43% |
| Snyder | 1,394 | 1,509 | (115) | -7.62% |
| Thomas | 1,181 | 1,238 | (57) | -4.60% |
| Erick | 1,052 | 1,023 | 29 | 2.83% |
| | 9,809 | 9,700 | 149 | 1.54% |
| Sentinel | 901 | 859 | 42 | 4.89% |
| Blair | 818 | 894 | (76) | -8.50% |
| Cheyenne | 801 | 778 | 23 | 2.96% |
| Arapaho | 796 | 748 | 48 | 6.42% |
| Mt. View | 795 | 880 | (85) | -9.66% |
| Olustee | 607 | 680 | (73) | -10.74% |
| Hammon | 568 | 469 | 99 | 21.11% |
| Dill City | 562 | 526 | 36 | 6.84% |
| Canute | 541 | 524 | 17 | 3.24% |
| Corn | 503 | 591 | (88) | -14.89% |
| | 6,892 | 6,949 | (57) | -0.82% |
| Eldorado | 446 | 527 | (81) | -15.37% |
| Lone Wolf | 438 | 500 | (62) | -12.40% |
| East Duke | 424 | 445 | (21) | -4.72% |
| Mt. Park | 409 | 390 | 19 | 4.87% |
| Custer City | 375 | 393 | (18) | -4.58% |
| Butler | 287 | 345 | (58) | -16.81% |
| Carter | 256 | 254 | 2 | 0.79% |
| Roosevelt | 248 | 280 | (32) | -11.43% |
| Gotebo | 226 | 272 | (46) | -16.91% |
| Reydon | 210 | 177 | 33 | 18.64% |
| | 3,319 | 3,583 | (264) | -7.37% |
| Bessie | 181 | 190 | (9) | -4.74% |
| Martha | 162 | 205 | (43) | -20.98% |
| Rocky | 162 | 174 | (12) | -6.90% |
| Foss | 151 | 127 | 24 | 18.90% |
| Willow | 149 | 114 | 35 | 30.70% |
| Gould | 141 | 206 | (65) | -31.55% |
| Colony | 136 | 147 | (11) | -7.48% |
| | 1,082 | 1,163 | (81) | -6.96% |
| Elmer | 96 | 96 | - | |
| Headrick | 94 | 130 | (36) | -27.69% |
| Sweetwater | 87 | X | X | |
| Strong City | 47 | 42 | 5 | 11.90% |
| Texola | 36 | 47 | (11) | -23.40% |
| Friendship | 24 | X | X | |
| Cooperton | 16 | 20 | (4) | -20.00% |
| | 400 | 335 | (46) | -13.73% |

Southwest Oklahoma Economic Development District

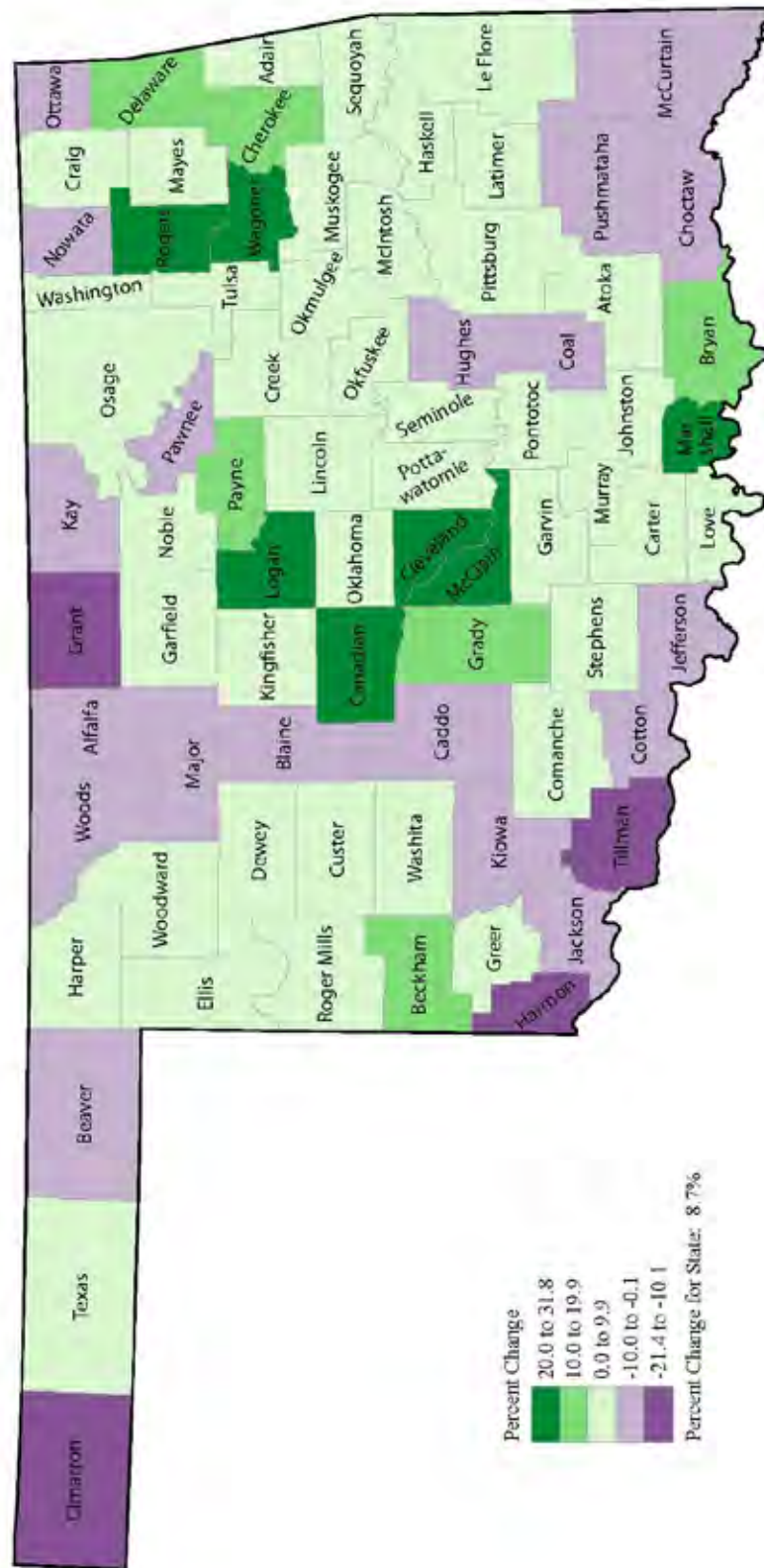
Regional Population compared to State and National

| | 2012 Est | 2010 | 2000 | 1990 | 1980 | 1970 | 1960 | 1950 | 1940 | 1930 | 1920 | 1910 | 1900 |
|-----------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|------------|------------|
| United States | 313,873,685 | 308,745,538 | 281,421,906 | 248,709,873 | 226,545,805 | 203,211,926 | 179,323,175 | 151,325,798 | 131,164,569 | 123,202,624 | 106,021,537 | 92,228,496 | 76,212,158 |
| Incr/(Decr) | 5,128,147 | 27,323,632 | 32,712,033 | 22,164,068 | 23,333,879 | 23,888,751 | 27,997,377 | 19,161,229 | 8,961,945 | 17,181,087 | 13,793,041 | 16,016,328 | |
| % +Incr/-Decr | 1.66% | 9.71% | 13.15% | 9.78% | 11.48% | 13.32% | 18.50% | 14.50% | 7.27% | 16.21% | 14.96% | 21.02% | |
| Oklahoma | 3,815,780 | 3,751,351 | 3,450,638 | 3,145,585 | 3,025,290 | 2,559,229 | 2,328,284 | 2,233,351 | 2,336,434 | 2,396,040 | 2,028,283 | 1,657,155 | 790,391 |
| Incr/(Decr) | 64,429 | 300,713 | 305,053 | 120,295 | 466,061 | 230,945 | 94,933 | (103,083) | (59,606) | 367,757 | 371,128 | | |
| % +Incr/-Decr | 1.72% | 8.71% | 9.70% | 3.98% | 18.21% | 9.92% | 4.25% | -4.41% | -2.49% | 18.13% | 22.40% | | |
| SWODA EDD | 111,548 | 109,917 | 108,895 | 111,760 | 118,449 | 111,761 | 121,323 | 126,612 | 148,346 | 192,763 | 142,932 | 159,865 | 51,377 |
| Incr/(Decr) | 1,631 | 1,022 | (2,865) | (6,689) | 6,688 | (9,562) | (5,289) | (21,734) | (44,417) | 49,831 | (16,933) | | |
| % +Incr/-Decr | 1.48% | 0.94% | -2.56% | -5.95% | 5.98% | -7.88% | -4.18% | -14.65% | -23.04% | 34.86% | -10.59% | | |
| 8 COUNTIES WITHIN SWODA EDD | | | | | | | | | | | | | |
| BECKHAM | 23,081 | 22,119 | 19,799 | 18,812 | 19,243 | 15,754 | 17,782 | 21,627 | 22,169 | 28,991 | 18,989 | 19,699 | - |
| CLUSTER | 28,536 | 27,469 | 26,142 | 26,897 | 25,995 | 22,865 | 21,040 | 21,097 | 23,068 | 27,517 | 18,736 | 23,231 | 12,264 |
| GREER | 6,082 | 6,239 | 6,061 | 6,559 | 7,028 | 7,979 | 8,877 | 11,749 | 14,550 | 20,282 | 15,836 | 16,449 | 17,922 |
| HARMON | 2,906 | 2,922 | 3,283 | 3,793 | 4,519 | 5,136 | 5,852 | 8,079 | 10,019 | 13,834 | 11,261 | 11,328 | - |
| JACKSON | 26,237 | 26,446 | 28,439 | 28,764 | 30,356 | 30,902 | 29,736 | 20,082 | 22,708 | 28,910 | 22,141 | 23,737 | - |
| KIOWA | 9,310 | 9,446 | 10,227 | 11,347 | 12,711 | 12,532 | 14,825 | 18,926 | 22,817 | 29,630 | 23,094 | 27,526 | - |
| ROGER MILLS | 3,774 | 3,647 | 3,436 | 4,147 | 4,799 | 4,452 | 5,090 | 7,395 | 10,736 | 14,164 | 10,638 | 12,861 | 6,190 |
| WASHITA | 11,622 | 11,629 | 11,508 | 11,441 | 13,798 | 12,141 | 18,121 | 17,857 | 22,279 | 29,435 | 22,237 | 25,034 | 15,001 |

Source: U.S. Census Bureau

OKLAHOMA - 2010 Census Results

Percent Change in Population by County: 2000 to 2010



Source: U.S. Census Bureau, Census 2000 and 2010 Census Redistricting Data Summary File
For more information visit www.census.gov.





















United States[™]
Census
Bureau

Jobs by Industry

| 40,623 Total Jobs (2013) | | 53.3% Male (National: 50.2%) | 46.7% Female (National: 49.8%) |
|-----------------------------|--|------------------------------------|--------------------------------------|
| NAICS | Industry | 2013 Jobs | |
| 11 | Agriculture, Forestry, Fishing and Hunting | 385 | |
| 21 | Mining, Quarrying, and Oil and Gas Extraction | 3,597 | |
| 22 | Utilities | 323 | |
| 23 | Construction | 1,641 | |
| 31 | Manufacturing | 2,545 | |
| 42 | Wholesale Trade | 1,682 | |
| 44 | Retail Trade | 5,443 | |
| 48 | Transportation and Warehousing | 1,439 | |
| 51 | Information | 336 | |
| 52 | Finance and Insurance | 1,311 | |
| 53 | Real Estate and Rental and Leasing | 712 | |
| 54 | Professional, Scientific, and Technical Services | 1,053 | |
| 55 | Management of Companies and Enterprises | 110 | |
| 56 | Administrative and Support and Waste Management and Remediation Services | 1,195 | |
| 61 | Educational Services (Private) | 203 | |
| 62 | Health Care and Social Assistance | 3,545 | |
| 71 | Arts, Entertainment, and Recreation | 394 | |
| 72 | Accommodation and Food Services | 3,784 | |
| 81 | Other Services (except Public Administration) | 770 | |
| 90 | Government | 10,155 | |
| 99 | Unclassified Industry | 0 | |

Source: Economic Modeling Specialists International

Average Earnings by Industry

| \$48,345 | | \$60,707 | \$34,243 |
|-----------------------------|--|----------------------------------|---|
| Avg. Earnings (2013) | | Male Avg. Earnings (2013) | Female Avg. Earnings (2013) |
| 80% of Nation Avg. | | 82% of Nation Avg. | 73% of Nation Avg. |
| NAICS | Industry | Avg. Earnings (2013) | |
| 11 | Agriculture, Forestry, Fishing and Hunting | \$39,003 |  |
| 21 | Mining, Quarrying, and Oil and Gas Extraction | \$91,002 |  |
| 22 | Utilities | \$80,310 |  |
| 23 | Construction | \$52,308 |  |
| 31 | Manufacturing | \$56,657 |  |
| 42 | Wholesale Trade | \$62,997 |  |
| 44 | Retail Trade | \$28,340 |  |
| 48 | Transportation and Warehousing | \$68,849 |  |
| 51 | Information | \$43,093 |  |
| 52 | Finance and Insurance | \$49,962 |  |
| 53 | Real Estate and Rental and Leasing | \$63,811 |  |
| 54 | Professional, Scientific, and Technical Services | \$52,703 |  |
| 55 | Management of Companies and Enterprises | \$49,236 |  |
| 56 | Administrative and Support and Waste Management and Remediation Services | \$40,580 |  |
| 61 | Educational Services (Private) | \$80,379 |  |
| 62 | Health Care and Social Assistance | \$37,473 |  |
| 71 | Arts, Entertainment, and Recreation | \$33,652 |  |
| 72 | Accommodation and Food Services | \$14,332 |  |
| 81 | Other Services (except Public Administration) | \$30,354 |  |
| 90 | Government | \$52,339 |  |
| 99 | Unclassified Industry | |  |

Source: Economic Modeling Specialists International

Unemployment by Industry

| 2,236 Total Unemployment (8/2013) | | | |
|--------------------------------------|--|------------------------|--------------------|
| NAICS | Industry | Unemployed (8/2013) | % of Unemployed |
| 11 | Agriculture, Forestry, Fishing and Hunting | 10 | 0% |
| 21 | Mining, Quarrying, and Oil and Gas Extraction | 168 | 8% |
| 22 | Utilities | 15 | 1% |
| 23 | Construction | 109 | 5% |
| 31 | Manufacturing | 155 | 7% |
| 42 | Wholesale Trade | 50 | 2% |
| 44 | Retail Trade | 284 | 13% |
| 48 | Transportation and Warehousing | 61 | 3% |
| 51 | Information | 22 | 1% |
| 52 | Finance and Insurance | 56 | 3% |
| 53 | Real Estate and Rental and Leasing | 44 | 2% |
| 54 | Professional, Scientific, and Technical Services | 62 | 3% |
| 55 | Management of Companies and Enterprises | 1 | 0% |
| 56 | Administrative and Support and Waste Management and Remediation Services | 79 | 4% |
| 61 | Educational Services (Private) | 27 | 1% |
| 62 | Health Care and Social Assistance | 138 | 6% |
| 71 | Arts, Entertainment, and Recreation | 37 | 2% |
| 72 | Accommodation and Food Services | 146 | 7% |
| 81 | Other Services (except Public Administration) | 71 | 3% |
| 90 | Government | 389 | 17% |
| 99 | No Previous Work Experience/Unspecified | 310 | 14% |

Source: Economic Modeling Specialists International

Imports

| \$7,029,809,767 Imports (2011) 78% of Demand | | \$2,002,482,839 Locally Produced & Consumed (2011) 22% of Demand | |
|---|--|---|---|
| NAICS | Industry | Imports (2011) | |
| 11 | Agriculture, Forestry, Fishing and Hunting | \$332,548,475 |  |
| 21 | Mining, Quarrying, and Oil and Gas Extraction | \$107,904,292 |  |
| 22 | Utilities | \$69,103,319 |  |
| 23 | Construction | \$223,574,964 |  |
| 31 | Manufacturing | \$1,411,156,321 |  |
| 42 | Wholesale Trade | \$322,254,149 |  |
| 44 | Retail Trade | \$191,621,152 |  |
| 48 | Transportation and Warehousing | \$194,182,434 |  |
| 51 | Information | \$271,968,636 |  |
| 52 | Finance and Insurance | \$400,567,975 |  |
| 53 | Real Estate and Rental and Leasing | \$283,135,238 |  |
| 54 | Professional, Scientific, and Technical Services | \$443,492,948 |  |
| 55 | Management of Companies and Enterprises | \$150,704,746 |  |
| 56 | Administrative and Support and Waste Management and Remediation Services | \$137,643,190 |  |
| 61 | Educational Services (Private) | \$73,908,198 |  |
| 62 | Health Care and Social Assistance | \$349,124,372 |  |
| 71 | Arts, Entertainment, and Recreation | \$47,601,215 |  |
| 72 | Accommodation and Food Services | \$120,909,285 |  |
| 81 | Other Services (except Public Administration) | \$83,859,257 |  |
| 90 | Government | \$1,814,549,600 |  |

Source: Economic Modeling Specialists International

Exports

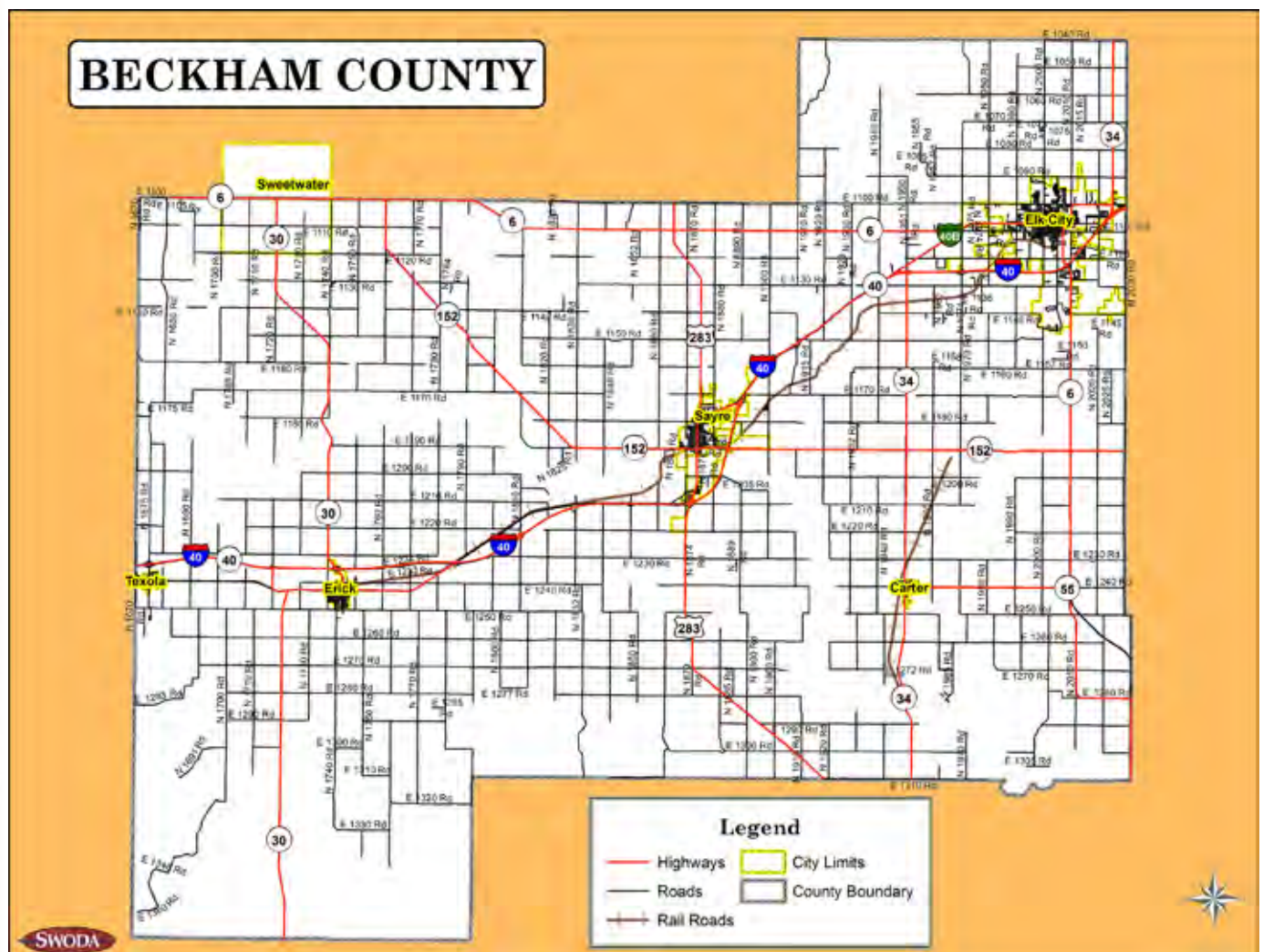
| \$7,852,781,717.41 Exports (2011) 80% of Supply | | | |
|--|--|-----------------|---|
| NAICS | Industry | Exports(2011) | |
| 11 | Agriculture, Forestry, Fishing and Hunting | \$556,840,834 |  |
| 21 | Mining, Quarrying, and Oil and Gas Extraction | \$1,897,965,049 |  |
| 22 | Utilities | \$79,018,390 |  |
| 23 | Construction | \$132,190,403 |  |
| 31 | Manufacturing | \$888,194,368 |  |
| 42 | Wholesale Trade | \$190,081,652 |  |
| 44 | Retail Trade | \$236,178,461 |  |
| 48 | Transportation and Warehousing | \$230,755,474 |  |
| 51 | Information | \$26,870,792 |  |
| 52 | Finance and Insurance | \$143,461,994 |  |
| 53 | Real Estate and Rental and Leasing | \$217,299,503 |  |
| 54 | Professional, Scientific, and Technical Services | \$48,654,277 |  |
| 55 | Management of Companies and Enterprises | \$8,378,681 |  |
| 56 | Administrative and Support and Waste Management and Remediation Services | \$65,365,742 |  |
| 61 | Educational Services (Private) | \$26,040,909 |  |
| 62 | Health Care and Social Assistance | \$100,236,209 |  |
| 71 | Arts, Entertainment, and Recreation | \$23,475,126 |  |
| 72 | Accommodation and Food Services | \$90,782,673 |  |
| 81 | Other Services (except Public Administration) | \$54,303,037 |  |
| 90 | Government | \$2,836,688,142 |  |

Source: Economic Modeling Specialists International

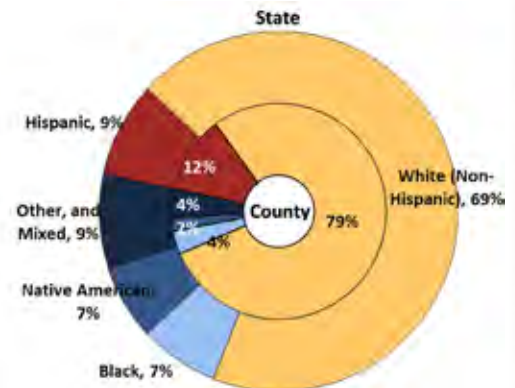
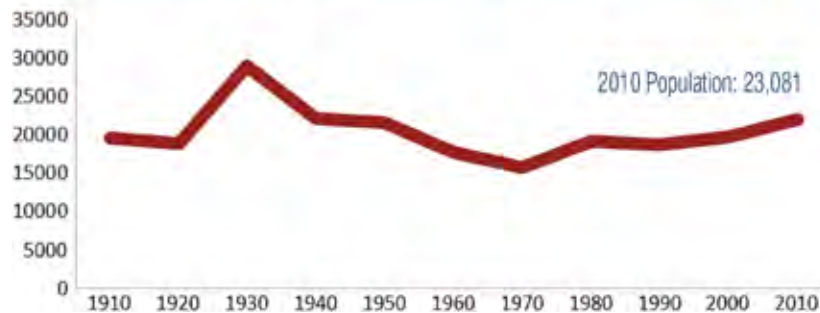
Beckham County: *Elk City Micropolitan Area*

A micro area contains an urban core of at least 10,000 (but less than 50,000) population. Each micro area consists of one or more counties and includes the counties containing the core urban area, as well as any adjacent counties that have a high degree of social and economic integration (as measured by commuting to work) with the urban core. U.S. Census Bureau

Carter Sayre
Elk City
Erick



Population of Beckham County



Economy of Beckham County

Pct. of total employment in state and local government: **7%**

Median Personal Income
\$43,565

Pct. of working-age civilians in labor force: **46%**

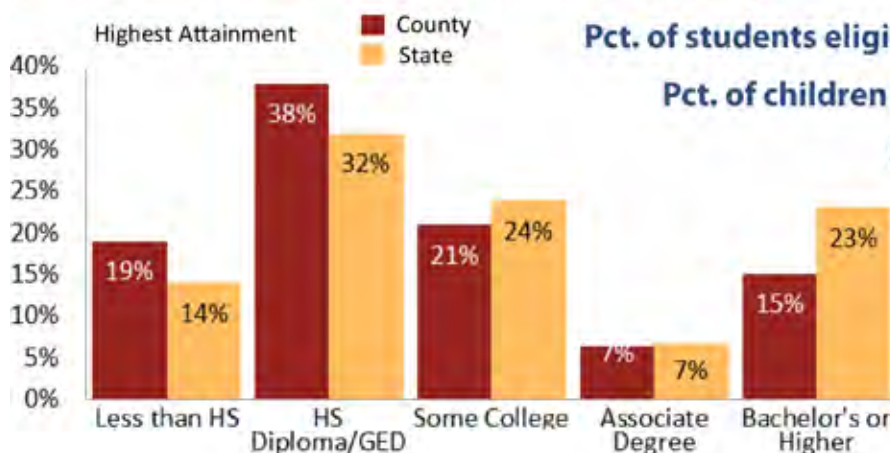
Pct. of total employment in farming: **6%**

Child poverty rate: **25%**

Top 5 Employment Sectors



Education in Beckham County



Pct. of students eligible for free/reduced lunch: **54%**

Pct. of children who are minority children: **23%**

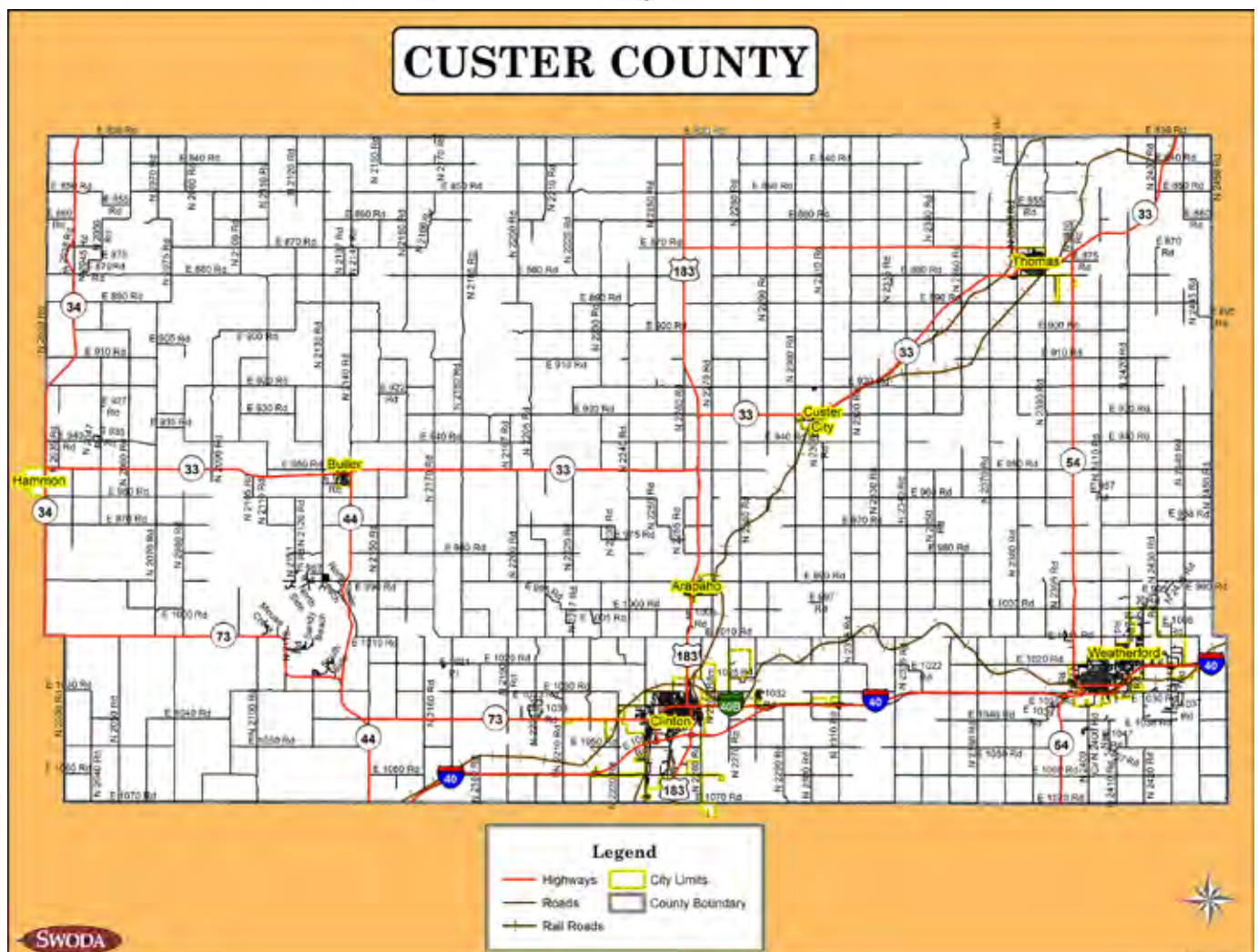
Student to teacher ratio: **15 to 1**

Charts provided by okpolicy.org

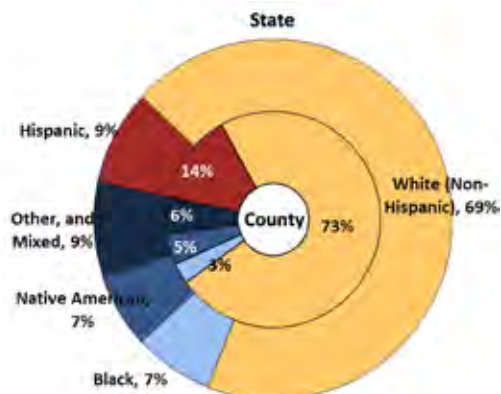
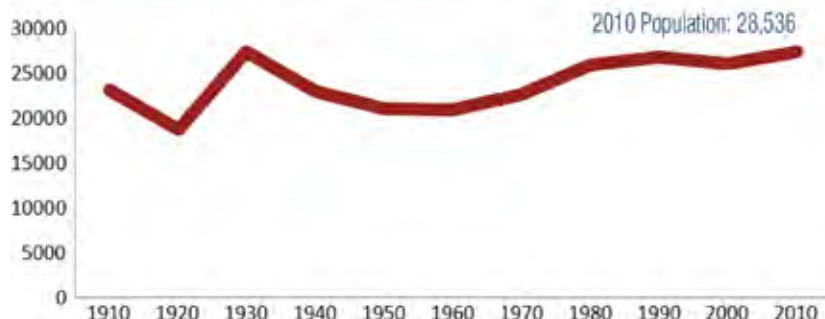
Custer County: Weatherford Micropolitan Area

A micro area contains an urban core of at least 10,000 (but less than 50,000) population. Each micro area consists of one or more counties and includes the counties containing the core urban area, as well as any adjacent counties that have a high degree of social and economic integration (as measured by commuting to work) with the urban core. U.S. Census Bureau

Thomas Butler
Arapaho Custer Weatherford
Clinton Custer City



Population of Custer County



Economy of Custer County

Median Personal Income
\$41,678

Pct. of total employment in state and local government: **15%**

Pct. of working-age civilians in labor force: **50%**

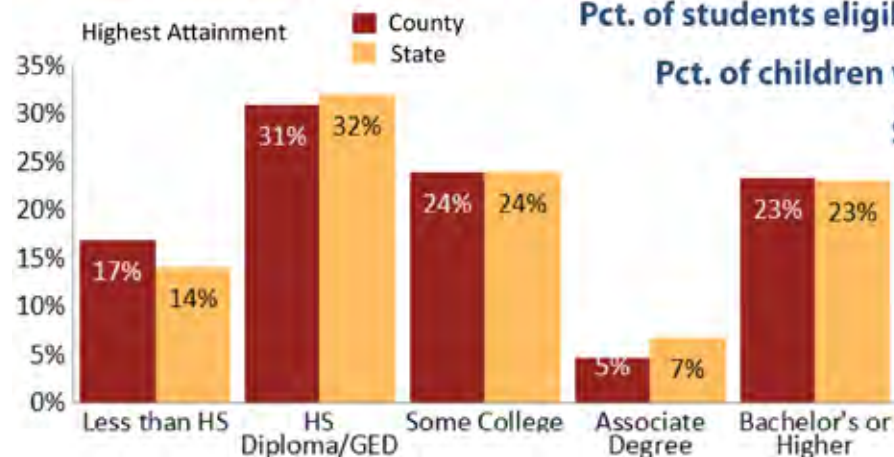
Pct. of total employment in farming: **5%**

Child poverty rate: **21%**

Top 5 Employment Sectors



Education in Custer County



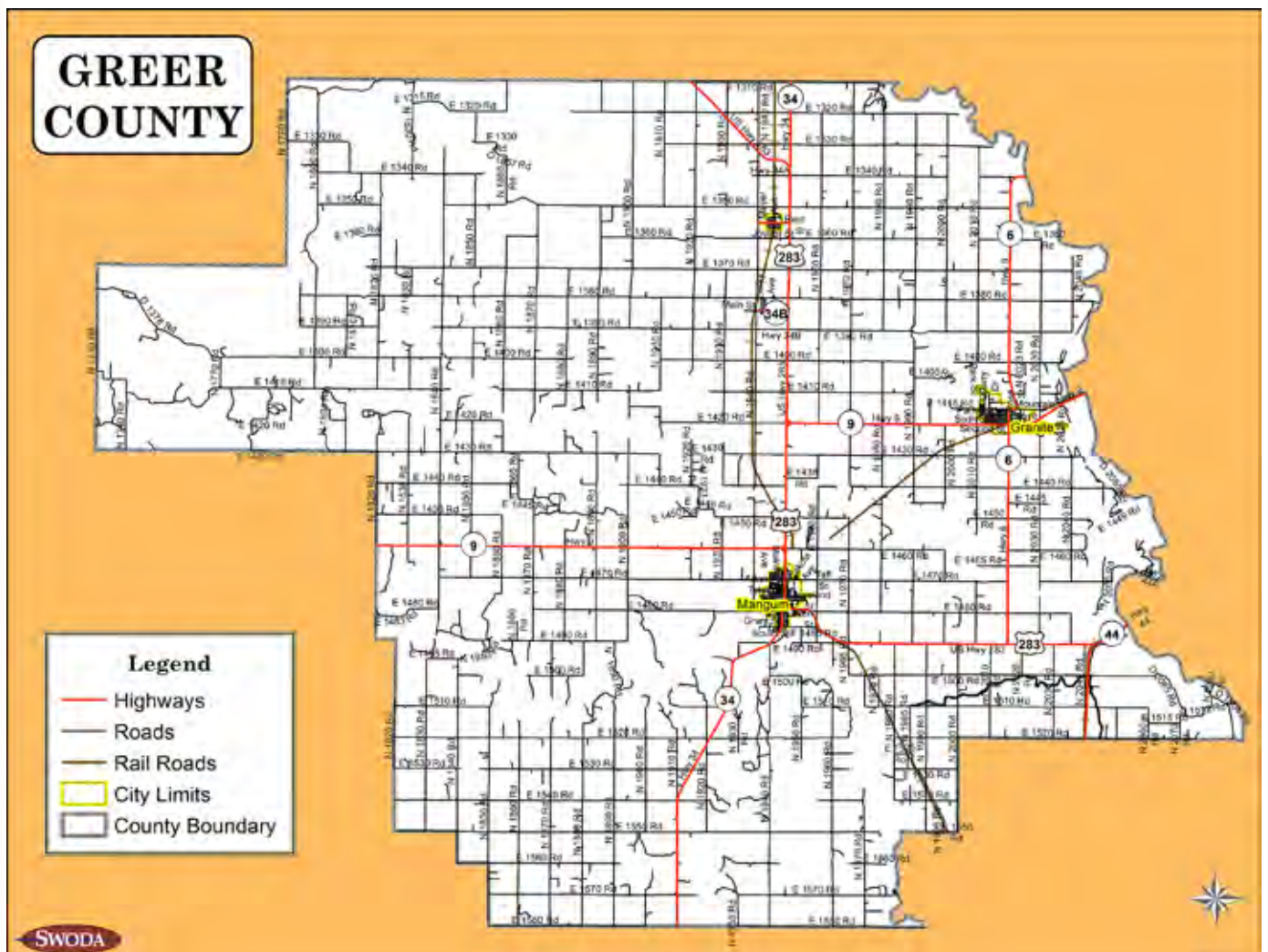
Pct. of students eligible for free/reduced lunch: **62%**

Pct. of children who are minority children: **29%**

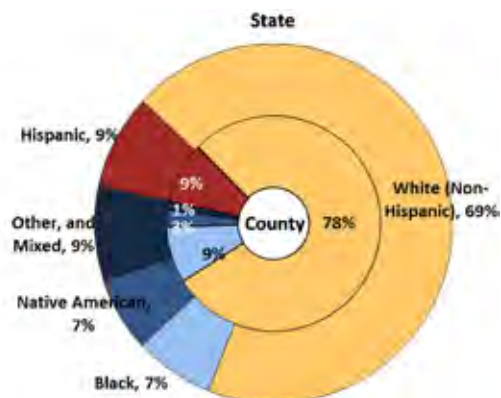
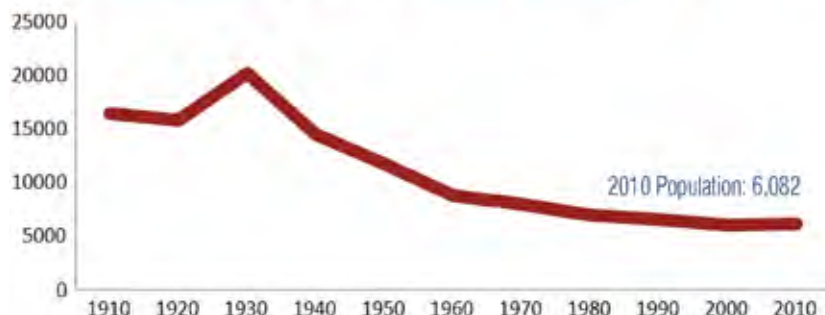
Student to teacher ratio: **15 to 1**

Greer County

Granite Mangum Willow



Population of Greer County



Economy of Greer County

Median Personal Income
\$34,350

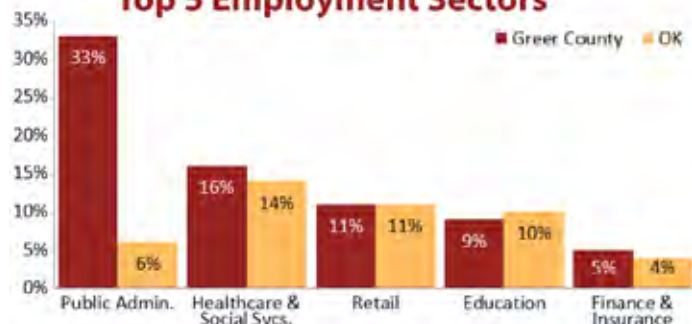
Pct. of total employment in state and local government: **28%**

Pct. of working-age civilians in labor force: **37%**

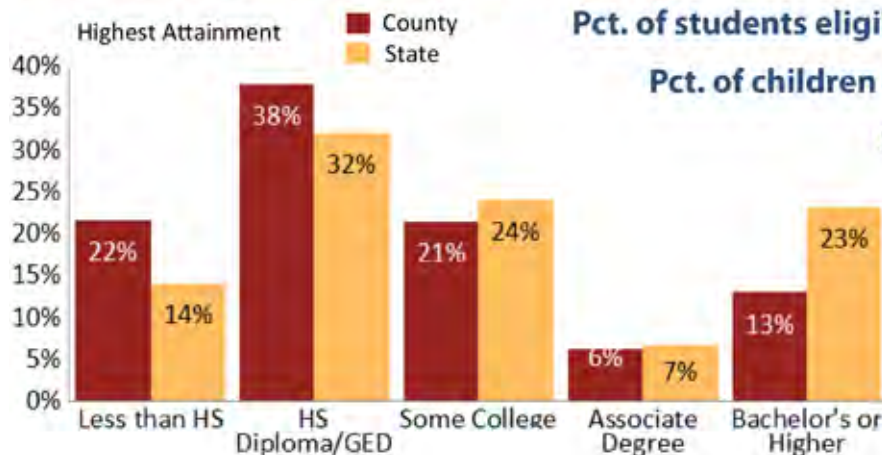
Pct. of total employment in farming: **21%**

Child poverty rate: **28%**

Top 5 Employment Sectors



Education in Greer County



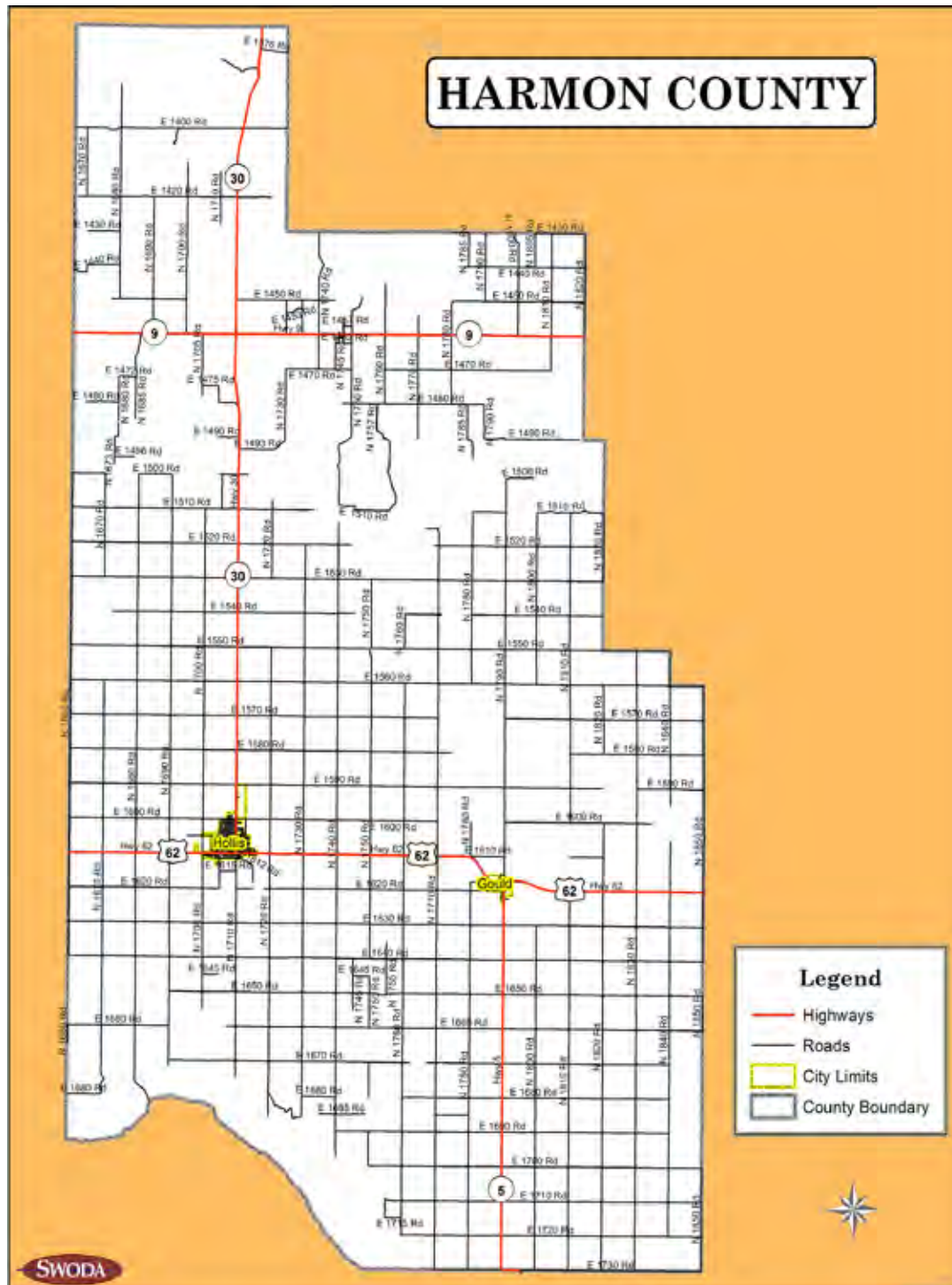
Pct. of students eligible for free/reduced lunch: **62%**

Pct. of children who are minority children: **23%**

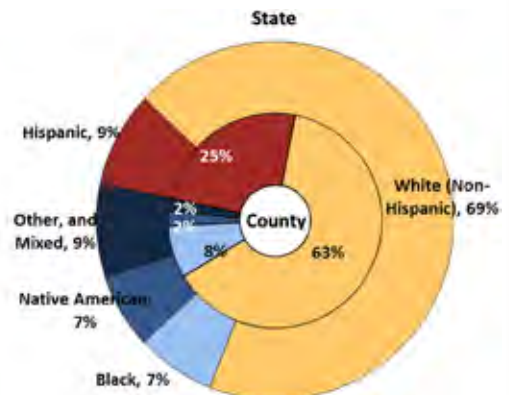
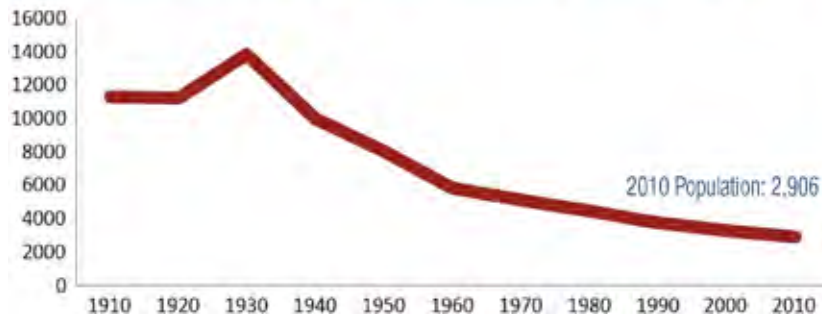
Student to teacher ratio: **13 to 1**

Harmon County

Hollis
Gould
Vinson



Population of Harmon County



Economy of Harmon County

Median Personal Income
\$30,329

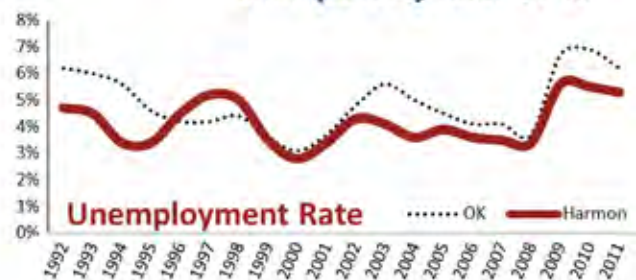
Pct. of total employment in state and local government: **19%**

Pct. of working-age civilians in labor force: **44%**

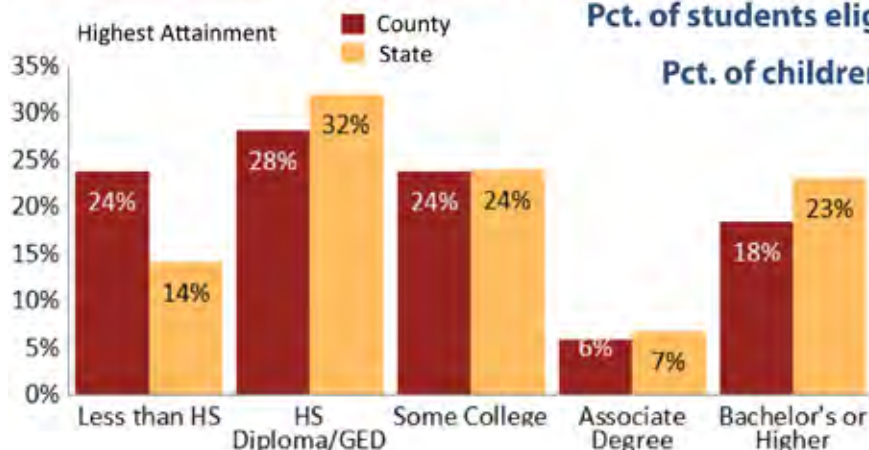
Pct. of total employment in farming: **25%**

Child poverty rate: **37%**

Top 5 Employment Sectors



Education in Harmon County



Pct. of students eligible for free/reduced lunch: **83%**

Pct. of children who are minority children: **39%**

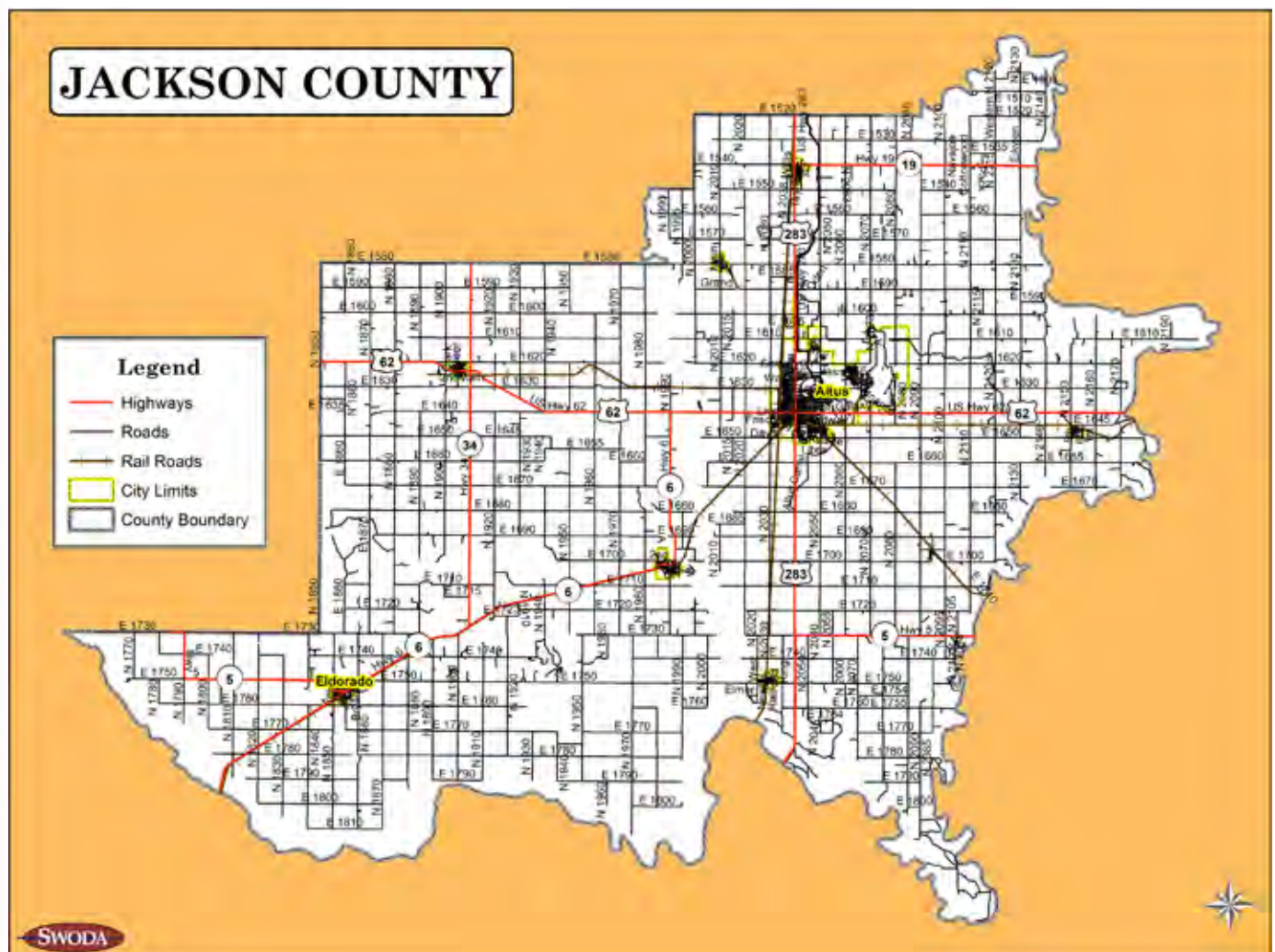
Student to teacher ratio: **13 to 1**

Charts provided by okpolicy.org

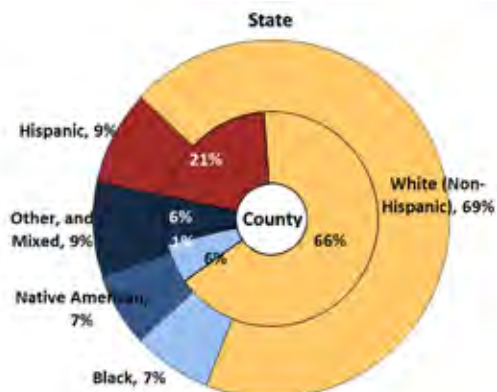
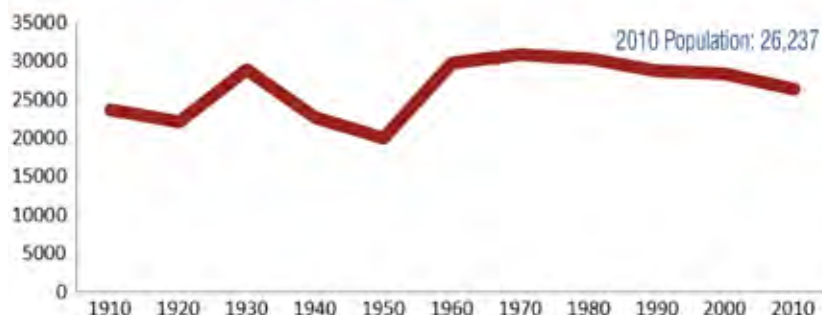
Jackson County: Altus Micropolitan Area

A micro area contains an urban core of at least 10,000 (but less than 50,000) population. Each micro area consists of one or more counties and includes the counties containing the core urban area, as well as any adjacent counties that have a high degree of social and economic integration (as measured by commuting to work) with the urban core. U.S. Census Bureau

MARTHA
ELDORADO
ELMER
BLAIR
DUKE
ROLU
STEE
ALTUS
HEADRICK
ALTUS



Population of Jackson County



Economy of Jackson County

Median Personal Income
\$40,129 (36th)

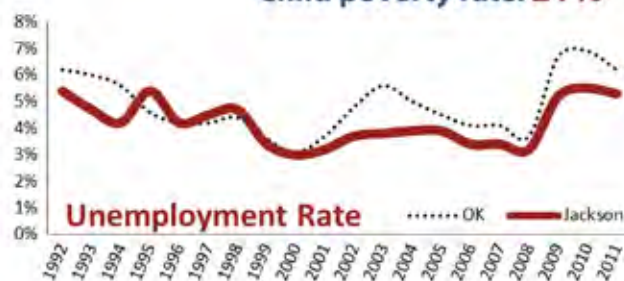
Pct. of total employment in state and local government: **17%**

Pct. of working-age civilians in labor force: **46%**

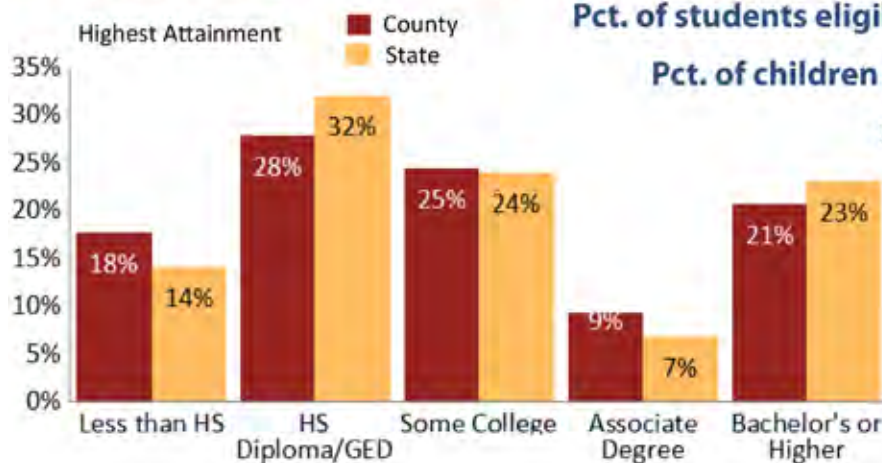
Pct. of total employment in farming: **5%**

Child poverty rate: **21%**

Top 5 Employment Sectors



Education in Jackson County



Pct. of students eligible for free/reduced lunch: **59%**

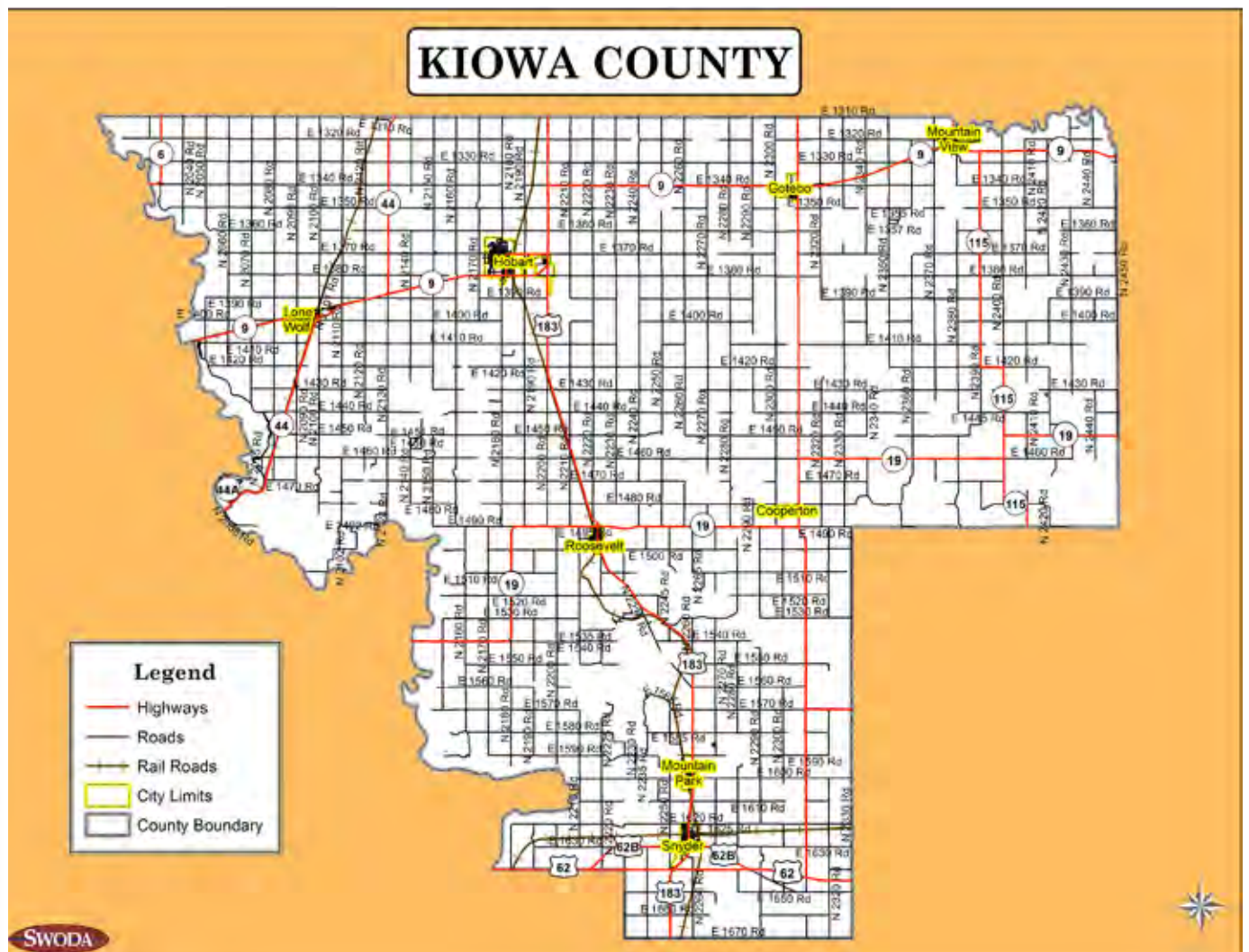
Pct. of children who are minority children: **36%**

Student to teacher ratio: **14 to 1**

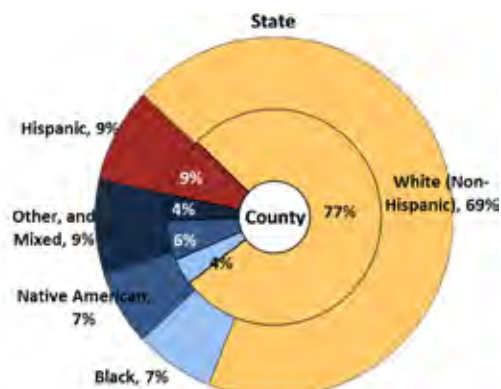
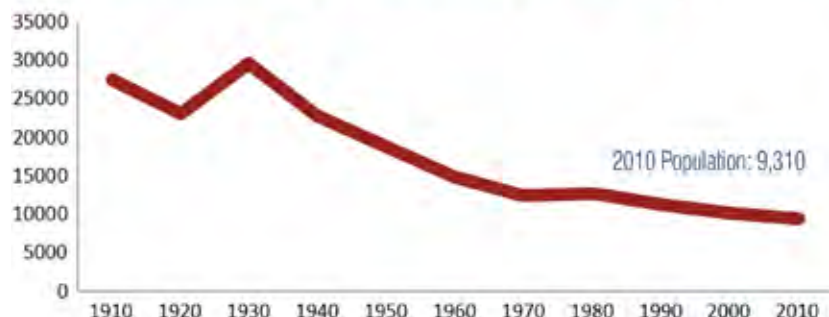
Charts provided by okpolicy.org

Kiowa County

Snyder
Mountain Park
Mountain View
Lone Wolf
Roosevelt Hobart
Gotebo



Population of Kiowa County



Economy of Kiowa County

Median Personal Income
\$35,977

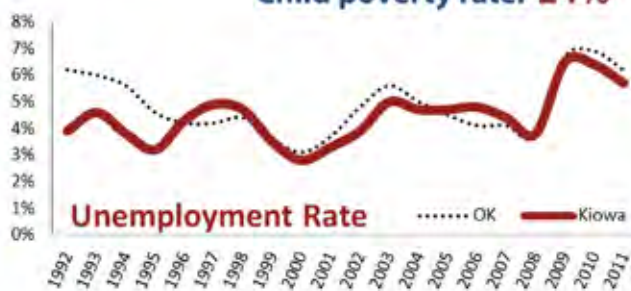
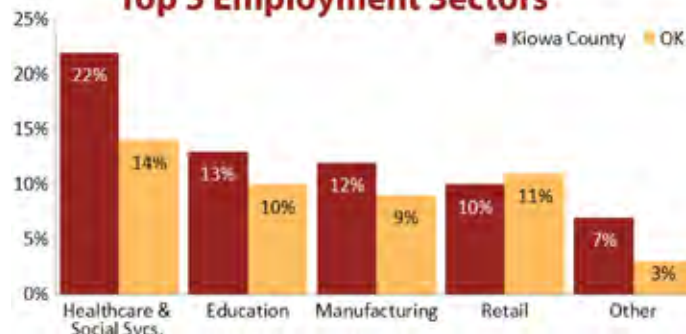
Pct. of total employment in state and local government: **17%**

Pct. of working-age civilians in labor force: **45%**

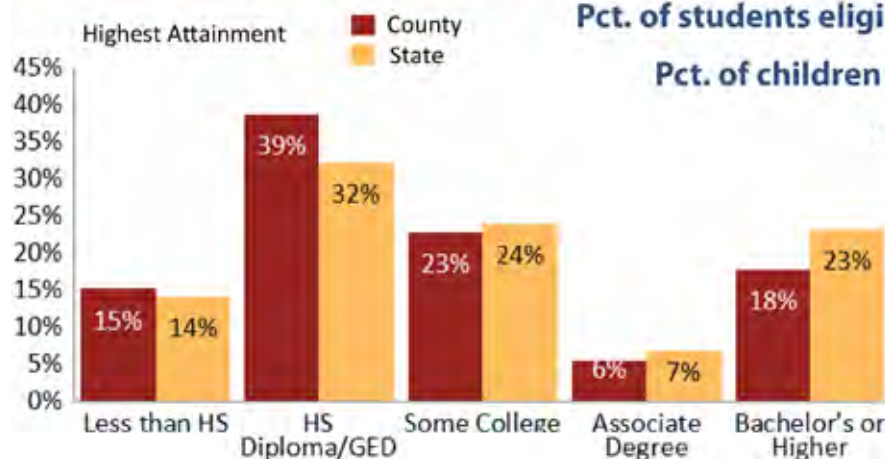
Pct. of total employment in farming: **15%**

Child poverty rate: **24%**

Top 5 Employment Sectors



Education in Kiowa County



Pct. of students eligible for free/reduced lunch: **69%**

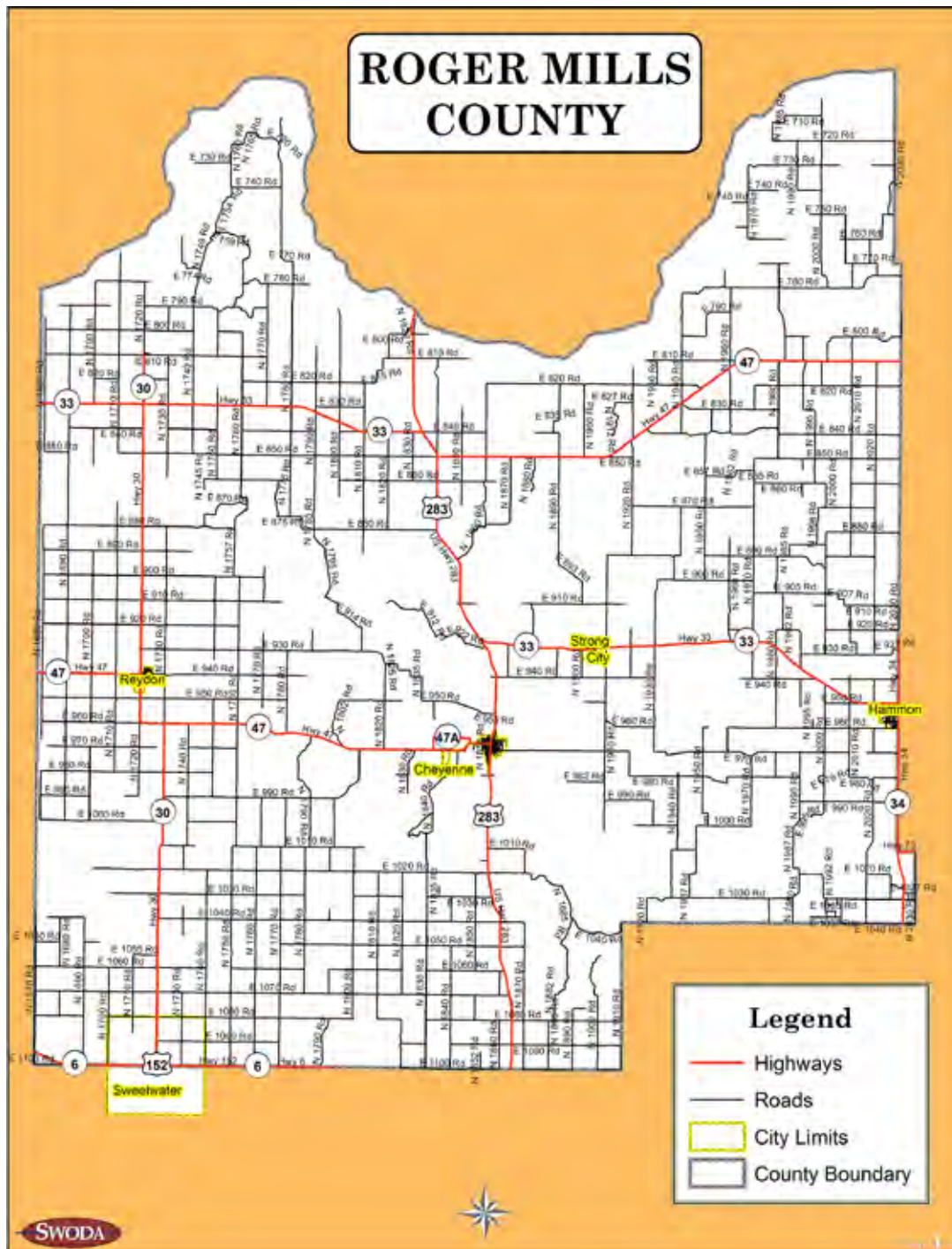
Pct. of children who are minority children: **24%**

Student to teacher ratio: **13 to 1**

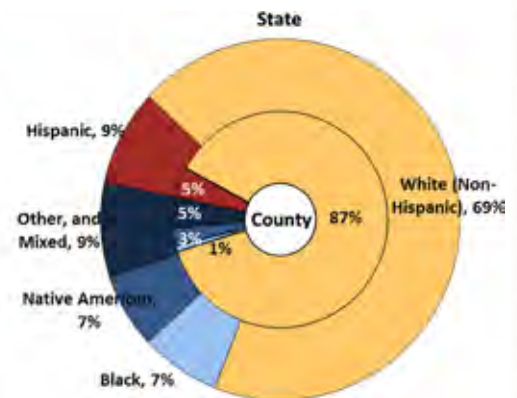
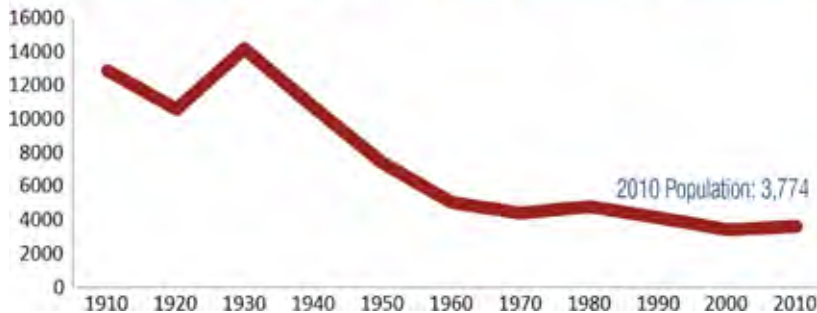
Charts provided by okpolicy.org

Roger Mills County

Durham
Reydon Sweetwater
Hammon
Cheyenne



Population of Roger Mills County



Economy

Median Personal Income
\$50,761

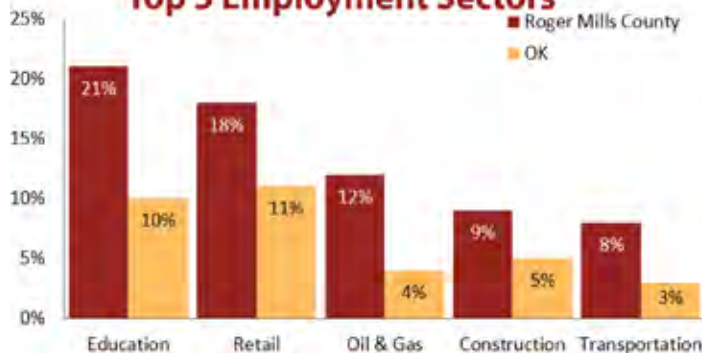
Pct. of total employment in state and local government: **15%**

Pct. of working-age civilians in labor force: **42%**

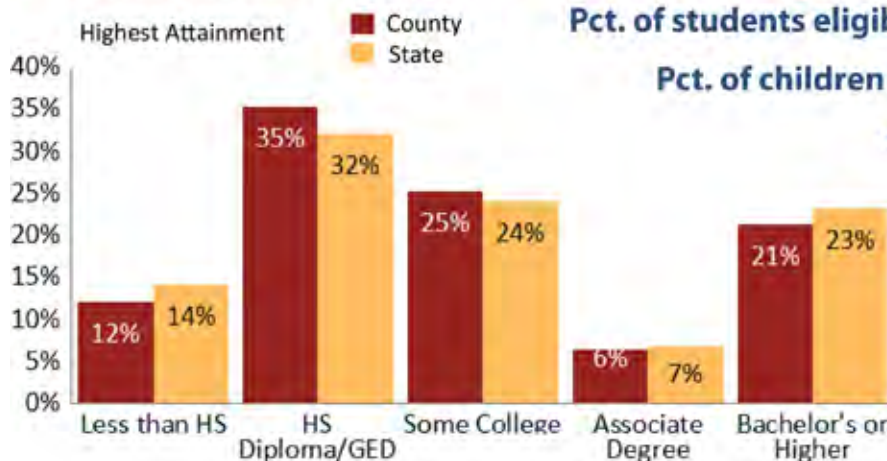
Pct. of total employment in farming: **28%**

Child poverty rate: **21%**

Top 5 Employment Sectors



Education in Roger Mills County



Pct. of students eligible for free/reduced lunch: **50%**

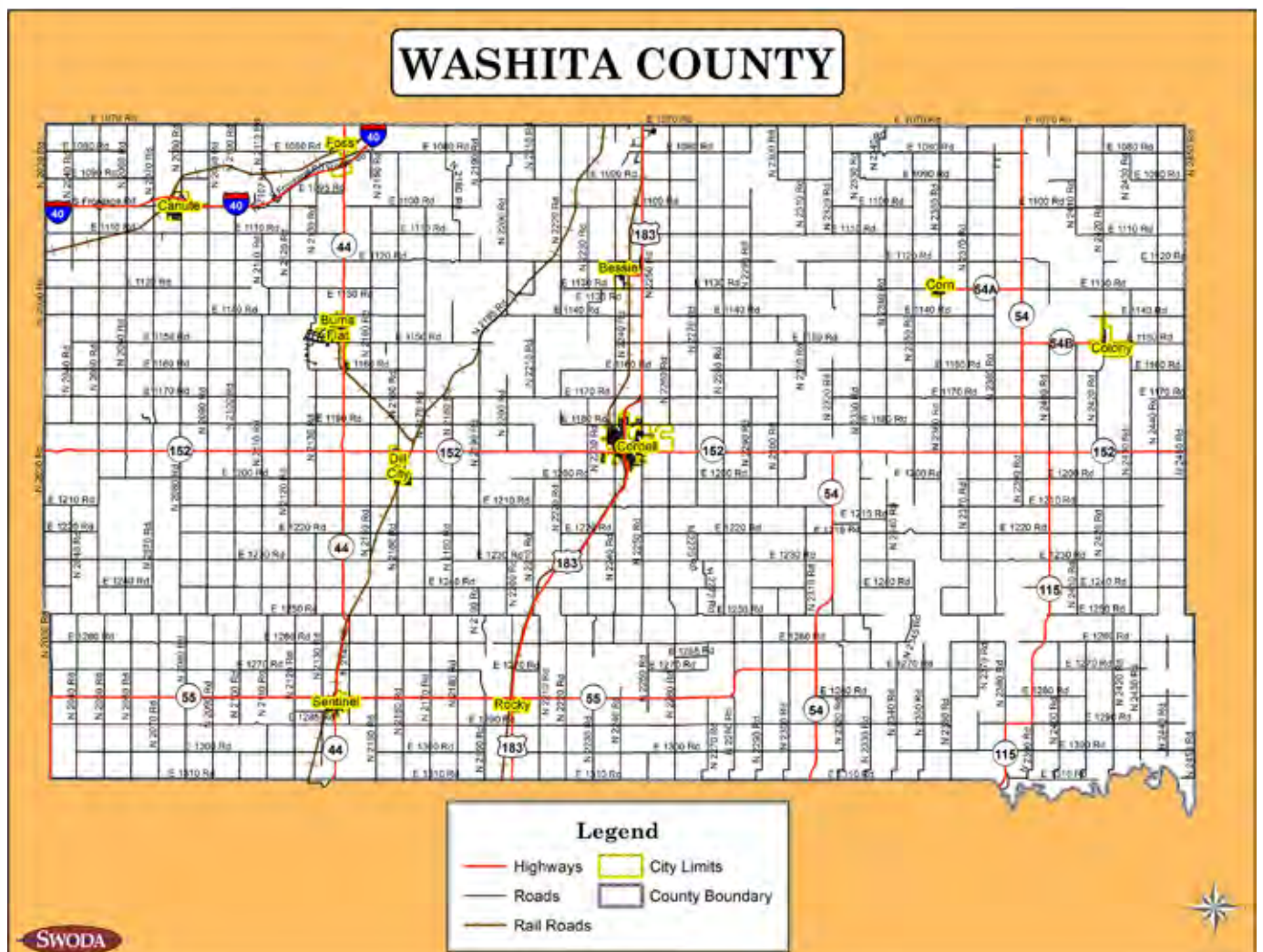
Pct. of children who are minority children: **14%**

Student to teacher ratio: **10 to 1**

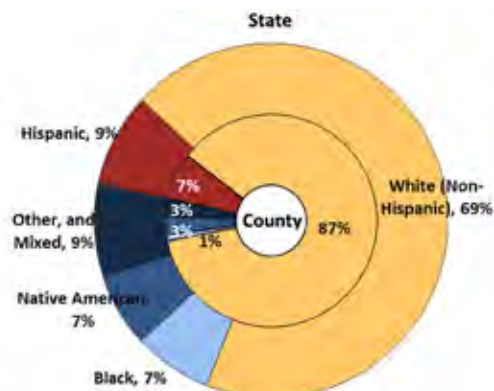
Charts provided by okpolicy.org

Washita County

Sentinel
Burns Flat Colony Bessie
Dill City Cordell Foss
Canute Rocky



Population of Washita County



Economy of Washita County

Median Personal Income
\$45,374

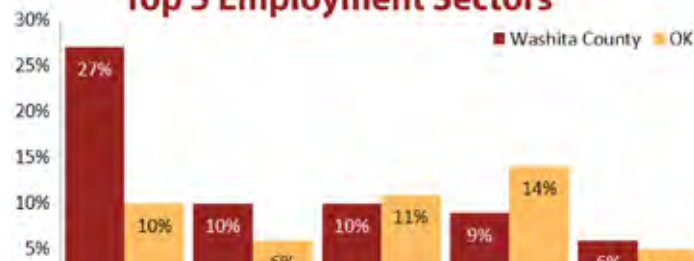
Pct. of total employment in state and local government: **16%**

Pct. of working-age civilians in labor force: **46%**

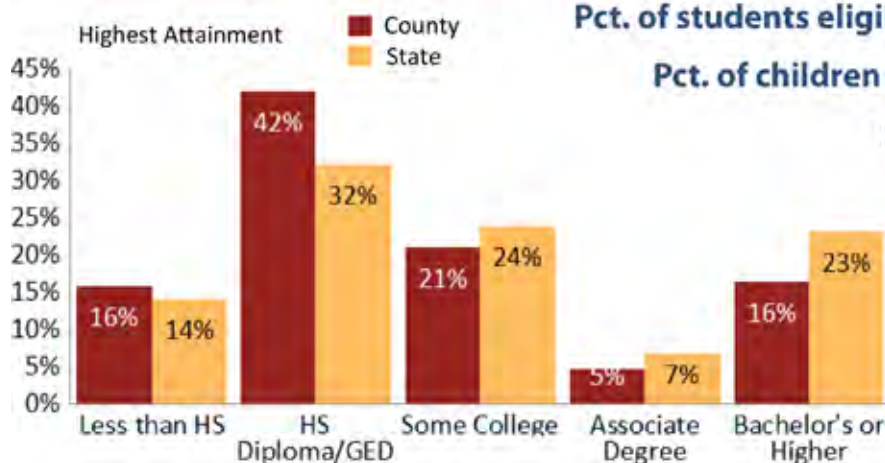
Pct. of total employment in farming: **20%**

Child poverty rate: **22%**

Top 5 Employment Sectors



Education in Washita County



Pct. of students eligible for free/reduced lunch: **69%**

Pct. of children who are minority children: **16%**

Student to teacher ratio: **14 to 1**

Charts provided by okpolicy.org

ROGER MILLS CUSTER
BECKHAM WASHITA
HARMON GREER KIOWA
JACKSON KIOWA

CEDS