

CITY OF NORMAN, OK CITY COUNCIL REGULAR MEETING

Municipal Building, Council Chambers, 201 West Gray, Norman, OK 73069 Tuesday, March 14, 2023 at 6:30 PM

AGENDA

CITY COUNCIL, NORMAN UTILITIES AUTHORITY, NORMAN MUNICIPAL AUTHORITY, AND NORMAN TAX INCREMENT FINANCE AUTHORITY

It is the policy of the City of Norman that no person or groups of persons shall on the grounds of race, color, religion, ancestry, national origin, age, place of birth, sex, sexual orientation, gender identity or expression, familial status, marital status, including marriage to a person of the same sex, disability, retaliation, or genetic information, be excluded from participation in, be denied the benefits of, or otherwise subjected to discrimination in employment activities or in all programs, services, or activities administered by the City, its recipients, sub-recipients, and contractors. In the event of any comments, complaints, modifications, accommodations, alternative formats, and auxiliary aids and services regarding accessibility or inclusion, please contact the ADA Technician at 405-366-5424, Relay Service: 711. To better serve you, five (5) business days' advance notice is preferred.

You are required to sign up in advance of the meeting on the City's webpage, by calling the City Clerk's Office (405-366-5406), or at the Council Chambers prior to the start of the meeting with your name, ward, and item you wish to speak to including whether you are a proponent or opponent. When the time comes for public comments, the Clerk will call your name and you can make your way to the podium. Comments may be limited on items of higher interest, if so, the Mayor will announce that at the beginning of the meeting. Participants may speak one time only up to 3 minutes per person per item. There will be no yielding of time to another person. Sign up does not guarantee you will get to speak if the allotted time for that item has already been exhausted. If there is time remaining after those registered to speak have spoken, persons not previously signed up may have the opportunity to speak. Comments received must be limited to the motion on the floor only.

CALL TO ORDER

ROLL CALL

PLEDGE OF ALLEGIANCE

APPROVAL OF MINUTES

1. CONSIDERATION OF APPROVAL, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF THE MINUTES AS FOLLOWS:

CITY COUNCIL STUDY SESSION MINUTES OF NOVEMBER 29, 2022

PROCLAMATIONS

2. CONSIDERATION OF ACKNOWLEDGING RECEIPT, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF PROCLAMATION P-2223-12: A PROCLAMATION OF THE MAYOR OF THE CITY OF NORMAN, OKLAHOMA, PROCLAIMING MARCH 18, 2023, AS PUBLIC TRANSIT PROFESSIONAL APPRECIATION DAY IN THE CITY OF NORMAN.

COUNCIL ANNOUNCEMENTS

CONSENT DOCKET

This item is placed on the agenda so that the City Council, by unanimous consent, can designate those routine agenda items that they wish to be approved or acknowledged by one motion. If any item proposed does not meet with approval of all Councilmembers, that item will be heard in regular order. Staff recommends that Item 3 through Item 12 be placed on the consent docket.

Authorization for Purchase

3. CONSIDERATION OF ACKNOWLEDGEMENT, APPROVAL, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF THE CITY MANAGER'S CONTRACT AND CHANGE ORDER REPORT.

Donation

4. CONSIDERATION OF ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF A DONATION IN THE AMOUNT OF \$22,594.50 FROM THE ESTATE OF LINDA LEE WALLER TO BE USED AT THE NORMAN ANIMAL WELFARE CENTER WITH FUNDS TO BE DEPOSITED AS OUTLINED IN THE STAFF REPORT.

Easement

5. CONSIDERATION OF ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF EASEMENT E-2223-25: A PERMANENT SANITARY SEWER EASEMENT DONATED BY ASHTON GROVE MASTER ASSOCIATION, INC., FOR THE ASHTON GROVE LIFT STATION UPGRADES.

Contracts

6. CONSIDERATION OF APPROVAL, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF AMENDMENT NO. TWO TO CONTRACT K-1213-163: BY AND BETWEEN THE CITY OF NORMAN, OKLAHOMA, AND GARVER, L.L.C., INCREASING THE CONTRACT AMOUNT BY \$9,231 FOR A REVISED CONTRACT AMOUNT OF \$128,106 TO PROVIDE ENGINEERING DESIGN SERVICES FOR STREET WIDENING AND TRAFFIC SIGNAL IMPROVEMENTS AT THE 12TH AVENUE N.E., AND HIGH MEADOWS DRIVE INTERSECTION; AND BUDGET APPROPRIATION AS OUTLINED IN THE STAFF REPORT.

- 7. CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF CHANGE ORDER NO. FOUR TO CONTRACT K-2021-10: BY AND BETWEEN THE NORMAN MUNICIPAL AUTHORITY AND LANDMARK CONSTRUCTION GROUP, L.L.C., INCREASING THE CONTRACT AMOUNT BY \$2,439 FOR A REVISED CONTRACT AMOUNT OF \$2,431,645 AND ADDING 90 CALENDAR DAYS TO THE CONTRACT FOR THE HOUSEHOLD HAZARDOUS WASTE AND CONTAINER MAINTENANCE FACILITIES PROJECT, FINAL ACCEPTANCE OF THE PROJECT, AND FINAL PAYMENT IN THE AMOUNT OF \$30,840.22.
- 8. CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF CONTRACT K-2223-75: A CONTRACT BY AND BETWEEN NORMAN UTILITIES AUTHORITY AND GARVER, L.L.C., IN THE AMOUNT OF \$196,190 TO PROVIDE PROFESSIONAL ENGINEERING MODELING SERVICES FOR THE LAKE THUNDERBIRD PREDICTIVE LAKE OPTIMIZATION TOOL (PLOT) PROJECT AND BUDGET TRANSFER FROM WATER RECLAMATION FUND BALANCE TO PROJECT ACCOUNT.
- 9. CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION, AMENDMENT AND/OR POSTPONEMENT OF CONTRACT K-2223-113: A PROJECT AGREEMENT BY AND BETWEEN THE CITY OF NORMAN, OKLAHOMA, AND THE OKLAHOMA DEPARTMENT OF TRANSPORTATION FOR THE PHASE 10 PAVEMENT MARKINGS PROJECT, FEDERAL-AID PROJECT J3-6150(004)AG, JOB 36150(04) AND RESOLUTION R-2223-92.
- 10. CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF CONTRACT K-2223-129: A CONTRACT BY AND BETWEEN THE CITY OF NORMAN, OKLAHOMA, AND CLARITY TELECOM, L.L.C., D/B/A BLUEPEAK FIBER FOR A NON EXCLUSIVE AGREEMENT TO PROVIDE CABLE SERVICES AND CABLE SYSTEM IN THE CITY OF NORMAN.

Resolutions

- 11. CONSIDERATION OF APPROVAL, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF RESOLUTION R-2223-107: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, ADOPTING THE 2023 NORTH BASE MASTER PLAN FINAL REPORT DATED FEBRUARY 2023.
- 12. CONSIDERATION OF ADOPTION, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF RESOLUTION R-2223-112: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, INCREASING REIMBURSEMENT-REFUND ACCOUNT BY \$44,922.99 FOR REIMBURSEMENT OF THE JANUARY FRANCHISE ELECTION COST FROM OG&E AND APPROPRIATING THE SAME TO THE ELECTIONS ACCOUNT TO OFFSET FUTURE ELECTION COST FOR THE REMAINDER OF THE FISCAL YEAR.

NON-CONSENT ITEMS

- 13. CONSIDERATION OF OPENING, CLOSING, ACCEPTANCE, APPROVAL, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF A PUBLIC HEARING TO CONSIDER SUBSTANTIAL AMENDMENT ONE TO CONTRACT K-2122-77, THE SECOND YEAR ACTION PLAN AND THE HOME AMERICAN RESCUE PLAN ALLOCATION PLAN AND BUDGET APPROPRIATIONS AS OUTLINED IN THE STAFF REPORT.
- 14. CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF RESOLUTION R-2223-76: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, AMENDING THE NORMAN 2025 LAND USE AND TRANSPORTATION PLAN SO AS TO REMOVE LOT ONE (1), IN BLOCK ONE (1), OF HISTORIC BERRY FARMS ADDITION, TO NORMAN, CLEVELAND COUNTY, OKLAHOMA, FROM THE COMMERCIAL DESIGNATION AND HIGH DENSITY RESIDENTIAL DESIGNATION AND PLACE THE SAME IN THE COMMERCIAL DESIGNATION. (1300 WEST LINDSEY STREET)
- 15. CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF ORDINANCE O-2223-22 DPON SECOND AND FINAL READING: AN ORDINANCE OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, AMENDING SECTION 460 OF CHAPTER 22 OF THE CODE OF THE CITY OF NORMAN SO AS TO REMOVE LOT ONE (1), BLOCK ONE (1), OF HISTORIC BERRY FARMS ADDITION, TO NORMAN, CLEVELAND COUNTY, OKLAHOMA, FROM THE CO, SUBURBAN OFFICE COMMERCIAL DISTRICT, AND R-3, MULTIFAMILY DWELLING DISTRICT, AND PLACE SAME IN THE SPUD, SIMPLE PLANNED UNIT DEVELOPMENT DISTRICT; AND PROVIDING FOR THE SEVERABILITY THEREOF. (1300 WEST LINDSEY STREET)
- 16. CONSIDERATION OF ADOPTION, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF RESOLUTION R-2223-98: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, GRANTING A PARTIAL EXEMPTION FROM CURRENT STANDARDS RELATING TO PROPOSED HISTORIC BERRY FARMS WITH ADVANCEMENT OF THE SHORT FORM PLAT PROCESS. (LOCATED AT 1300 WEST LINDSEY STREET)
- 17. CONSIDERATION OF ADOPTION, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF RESOLUTION R-2223-102: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, GRANTING A PARTIAL EXEMPTION FROM CURRENT STANDARDS RELATING TO PROPOSED LOT 1, BLOCK 6, A REPLAT OF BLOCK 6, OAK RIDGE ADDITION, WITH ADVANCEMENT OF THE SHORT FORM PLAT PROCESS.

MISCELLANEOUS COMMENTS

This is an opportunity for citizens to address City Council. Due to Open Meeting Act regulations, Council is not able to participate in discussion during miscellaneous comments. Remarks should be directed to the Council as a whole and limited to three minutes or less.

ADJOURNMENT

File Attachments for Item:

1. CONSIDERATION OF APPROVAL, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF THE MINUTES AS FOLLOWS:

CITY COUNCIL STUDY SESSION MINUTES OF NOVEMBER 29, 2022



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 03/14/2023

REQUESTER: Brenda Hall

PRESENTER: Brenda Hall, City Clerk

ITEM TITLE: CONSIDERATION OF APPROVAL, REJECTION, AMENDMENT, AND/OR

POSTPONEMENT OF THE MINUTES AS FOLLOWS:

CITY COUNCIL STUDY SESSION MINUTES OF NOVEMBER 29, 2022





CITY OF NORMAN, OK

Municipal Building, Executive Conference Room, 201 West Gray, Norman, OK 73069

Tuesday, November 29, 2022 at 5:30 PM

MINUTES

It is the policy of the City of Norman that no person or groups of persons shall on the grounds of race, color, religion, ancestry, national origin, age, place of birth, sex, sexual orientation, gender identity or expression, familial status, marital status, including marriage to a person of the same sex, disability, retaliation, or genetic information, be excluded from participation in, be denied the benefits of, or otherwise subjected to discrimination in employment activities or in all programs, services, or activities administered by the City, its recipients, sub-recipients, and contractors. In the event of any comments, complaints, modifications, accommodations, alternative formats, and auxiliary aids and services regarding accessibility or inclusion, please contact the ADA Technician at 405-366-5424, Relay Service: 711. To better serve you, five (5) business days' advance notice is preferred.

CALL TO ORDER

PRESENT

Mayor Larry Heikkila
Councilmember Ward 1 Brandi Studley
Councilmember Ward 2 Lauren Schueler
Councilmember Ward 3 Kelly Lynn
Councilmember Ward 4 Helen Grant
Councilmember Ward 5 Rarchar Tortorello
Councilmember Ward 7 Stephen Holman
Councilmember Ward 8 Matthew Peacock

ABSENT

Councilmember Ward 6 Elizabeth Foreman

AGENDA ITEMS

1. DISCUSSION REGARDING MODIFICATIONS TO THE ENGINEERING DESIGN CRITERIA.

Mr. Scott Sturtz, City Engineer, said the Engineering Design Criteria (EDC) and Standard Specifications and Construction Drawings (SSCD) are two documents that were originally adopted in 1996 and last amended in July 2006. He said the EDC provides guidance to developers and design professionals regarding the design of all public infrastructure including roadways, storm sewer systems, drainage, erosion control, water lines, and sanitary sewer lines. He said the SSCD provides guidance for contractual agreements and the construction of all public infrastructure while Construction Drawings provide standard details for the construction and repair of public infrastructure.

Item 1.

Mr. Sturtz provided background on items that have been added or amended since 200 that include Water Quality Protection Zone (WQPZ) with Low Impact Development (LID) Manual; Public Rights-of-way Accessibility Guidelines (PROWAG); Comprehensive Transportation Plan; Complete Streets Manual; updates to stormwater modeling technology; new construction materials; revised construction methods; and updated State permits. He said the Comprehensive Transportation Plan of 2014 recommended an update of the EDC and SSCD. In 2017, Council's goal was to incentivize "green building codes" that included green building practices, green infrastructure/low impact development (GI/LID), and parking for new developments. The private sector expressed interest and Council approved sustainable design techniques (LID) and in July 2019, funding was included in the budget for the EDC update. In February 2020, the City contracted with Freese and Nichols for the EDC update.

Project objectives include a comprehensive update of the 25-year-old EDC and SSCD documents; consolidation of multiple, disconnected manuals into one easily-accessible modern manual; addition of Norman Green Stormwater Infrastructure (GSI) Manual to EDC; incorporation of Complete Streets Policy in EDC; updating Traffic Impact Analysis (TIA) Guidelines; incorporation of PROWAG in EDC; incorporating WQPZ Policy and practices in EDC; and correlating EDC with CPT.

Mr. Sturtz said Staff and community engagement is considered vital to the success of the project and a Staff Advisory Committee was formed consisting of ten Staff members representing Parks and Recreation, Planning, Public Works, and Utilities. A Stakeholder Committee was also formed that consisted of 25 members representing developers, homebuilders, consultants, community members, and contractors. The Stakeholder Committee was expanded to 33 members in Phase II based on requests from other members.

Ms. Dawn Warrick with Freese and Nichols said Phase I, Diagnostic Review and Benchmarking, included document review, stakeholder interviews, community benchmarking, and a diagnostic report. On June 22, 2020, a meeting with stakeholders was held to introduce the project, an overview of the draft Diagnostic Report, questions and answers, and opportunity for discussion. On December 9 through December 21, 2020, stakeholders reviewed the draft Diagnostic Report. The Diagnostic Report is a 66-page document identifying issues to be updated in the EDC and SSDC that propose solutions for items identified, and includes benchmarking related to Sustainable Stormwater Development Programs.

Phase II, EDC, Specifications, Construction Details, and Code Recommendations, included draft technical documents for the EDC, GSI, and SSCD; Code Review including the Zoning Code, Center City Form Based Code (CCFBC), Subdivision Regulations, landscaping, and parking; Review and Revisions included Staff Advisory Committee and Revised Draft; Final Reviews included Staff Advisory Committee, external stakeholders, Community Open House, and City Council and adoption of the updated report. A kick-off meeting was held on May 6, 2021, with 19 stakeholders attending, expanding stakeholder members to 33, and a subcommittee focused on specific topics. There were Subcommittee meetings that reviewed Sustainable Development, Drainage, Streets, and Utilities. Additional consultation with City Staff representing each topic has taken place throughout the development process.

Ms. Warrick highlighted topics of the meetings held that included:

- Section 1000, General, which includes general formatting and punctuation updates, consolidated definition section (EDC), and updated references to adopted codes, plans, and studies;
- Section 2000, Water Lines, was updated to reflect current practices and materials and revised installation of lines in subdivisions;
- Section 3000, Sanitary Sewer, was updated to reflect current practices and materials and revised location of lines in subdivisions;
- Section 4000, Streets, was aligned with CTP included Traffic Study Guidelines, incorporated Complete Streets, and identified PROWAG as best practices;
- Section 5000, Stormwater Quality, updated requirements for latest State Permits
- Section 6000, Stormwater Quality, added new Section to the EDC; replaced the outdated Wichita Stormwater Manual for GSI design; added a voluntary GSI design manual; considers modernized designs; added future consideration to incentivize GSI; and includes construction and maintenance requirements;
- Section 7000, Sustainable Stormwater Development, (new section) provides for different stormwater solutions such as manufactured stormwater system; bioretention; rain gardens; and porous pavement, etc.
- Development Regulations technical guidance for aligning updated EDC with Development Regulations by removing barriers and incentivizing Sustainable Stormwater Development.

Ms. Warrick said the updated documents will be easy to navigate and allow Staff to jump between different reference sections without scrolling through multiple documents.

A website, https://freese.mysocialpinpoint.com/normaneduupdate/home, was created for continued stakeholder/public input.

Meetings include the Council Study Session on November 29, 2022; ongoing Stakeholder input; Community Open House from November 30th through December 15th (virtual) and December 7th (hybrid/virtual with call-in option and in person); and City Council review and adoption on January 10, 2023.

Phase III, Implementation, includes training resources, workshops, checklists, design guides, and brochures or other publications. Ms. Warrick said implementation follows adoption of the updated EDC; supports roll out of new technical resources and programs; provides educational materials for review, inspection, design and construction activities; and provides materials to inform and educate the public. The final scope must be determined and authorized prior to initiating any Phase III work.

Mayor Heikkila said the documents are a little more technical than he would like and wondered if the wording on some items could be less technical and easier to interpret and Mr. Sturtz said Staff is working on a document that contractors, builders, City Crew Chiefs, etc., can easily understand and follow. He said the technical language is used more in the front end of the document for design professionals.

Councilmember Studley asked why the City would accept a "fee in lieu of detention" and Mr. Sturtz said the current EDC has a misrepresentation on the fee in lieu of detention. He said language states it is currently allowed in the "upper reach of the watershed," but should be the "lower reach of the watershed" near the Canadian River and Little

Item 1.

River and that is how it is applied. He said the fee in lieu of detention is not curren used and not often requested. He said a drainage analysis is required before determination of a fee in lieu of detention would be allowed, but other options are always considered. Councilmember Studley asked if fee in lieu of detention required Council approval and Mr. Shawn O'Leary, Director of Public Works, said yes, Council approves every preliminary plat, which can possibly include a fee in lieu of detention request.

Councilmember Peacock said there has been discussion regarding parking minimums and the City delayed adjusting those numbers while waiting for the EDC update and asked if that was reviewed during this process. Mr. Sturtz said those discussions have been about private parking lots and the EDC deals with public infrastructure so that was not reviewed. He said Staff would work with the Transportation Division for any on-street parking on neighborhood streets or in Downtown Norman where CCFBC addresses parking through zoning regulations. He said regulations regarding parking minimums for private parking lots is something that can be added to the EDC at a later time.

Councilmember Peacock asked if there is a standard detail or set of guidelines for impervious paving and Mr. Sturtz said there is no standard detail as the EDC is more of a guide and impervious paving is really site dependent. He said the type of paving, i.e. concrete, asphalt, etc., is a specific site design by the engineer and the EDC addresses how to accomplish that design with Section 7000. He said the City tries to be very consistent, but there are too many variables to make a standard regulation.

Councilmember Peacock asked if the new documents will be available in a Computer Aided Design (CAD) format and Mr. Sturtz said yes.

Councilmember Peacock asked if minimum lot sizes in terms of residential subdivision regulations had been reviewed and Mr. Sturtz said no because that is more of a subdivision regulation than how to construct the streets, water, etc. Mr. Darrel Pyle, City Manager said in terms of a Comprehensive Land Use update, would residential minimum lot size be looked at, and Ms. Jane Hudson, Director of Planning and Community Development, said that would depend on how much development and density is being brought in an area. Councilmember Peacock said in trying to promote density, the City's minimum lot size is not working in the City's favor and Mr. Pyle said that minimum lot sizes can be addressed in the Comprehensive Land Use update.

Councilmember Schueler said these documents are lengthy and technical so she is concerned with the timeline. She expressed concerns about there being enough time for public feedback, final review, and Council review by January 10, 2023, and asked if Council would feel comfortable with what is being presented at that time. Mr. Pyle said Freese and Nichols will work hard to achieve that goal, but sometimes going fast is not always better so he would be comfortable bringing this forward to Council at the second meeting in January or first meeting in February. Councilmember Schueler said she would like more time for feedback from the community and since many people are very busy during the holiday season she wants to make sure the City is giving the community enough time for feedback. Mr. Pyle said the item will be brought to Council in February.

Items submitted for the record

- 1. PowerPoint presentation entitled, "EDC Update Project," City Council Study Session, November 29, 2022
- 2. EDC Bullet Points dated November 28, 2022, from Evan Nixon to Mayor Larry Heikkila

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The meeting was adjourned at 6:36 p.m.		
ATTEST:		
City Clerk	Mavor	

File Attachments for Item:

2. CONSIDERATION OF ACKNOWLEDGING RECEIPT, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF PROCLAMATION P-2223-12: A PROCLAMATION OF THE MAYOR OF THE CITY OF NORMAN, OKLAHOMA, PROCLAIMING MARCH 18, 2023, AS PUBLIC TRANSIT PROFESSIONAL APPRECIATION DAY IN THE CITY OF NORMAN.



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 03/14/2023

REQUESTER: Taylor Johnson, Transit and Parking Program Manager

PRESENTER: Shawn O'Leary, Public Works Director

ITEM TITLE: CONSIDERATION OF ACKNOWLEDGING RECEIPT, REJECTION,

AMENDMENT, AND/OR POSTPONEMENT OF PROCLAMATION P-2223-12: A PROCLAMATION OF THE MAYOR OF THE CITY OF NORMAN, OKLAHOMA, PROCLAIMING MARCH 18, 2023, AS PUBLIC TRANSIT PROFESSIONAL

APPRECIATION DAY IN THE CITY OF NORMAN.

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P-2223-12

A PROCLAMATION OF THE MAYOR OF THE CITY OF NORMAN, OKLAHOMA, PROCLAIMING MARCH 18, 2023, AS PUBLIC TRANSIT PROFESSIONAL APPRECIATION DAY IN THE CITY OF NORMAN.

- § 1. WHEREAS, public transit benefits everyone in the City of Norman by reducing traffic and parking congestion, improving air quality and making our city more equitable and accessible to all by getting people where they need to go, from work and school, to medical appointments, grocery stores, and other essential services; and
- § 2. WHEREAS, both City of Norman and EMBARK public transit professionals manage a fleet of vehicles each day, maintain on-time route performance, assist residents in understanding and using the transit system, and play an integral role in economic development and driving the community of Norman forward; and
- § 3. WHEREAS, the duty of an EMBARK Norman Bus Operator is to safely maneuver transit vehicles through unpredictable traffic, tough weather conditions and very tight spaces, while exercising caution and following the laws of the road to maximize the safety of their passengers and serving as upstanding examples of safety, courtesy, discipline, and effective communication as they perform their duties each day; and
- § 4. WHEREAS, City of Norman Fleet-Transit maintenance staff provide expertise in the preventative maintenance and upkeep of a fleet of buses, vans, and shuttles for the safety of customers, visitors and the community; and
- § 5. WHEREAS, the EMBARK support staff provide excellence in customer service, dispatch, vehicle cleaning/fueling, and ensure the integral role of public transit to the transportation of residents and visitors of the city; and
- § 6. WHEREAS, City of Norman Transit administrative staff work diligently on improvements to the City's transit system including vehicle procurement, grant management, and service changes; and
- § 7. WHEREAS, City of Norman public transit vehicles travel in excess of 400,000 miles and facilitate more than 250,000 passenger trips annually in Norman.

NOW, THEREFORE, I, MAYOR OF THE CITY OF NORMAN, OKLAHOMA:

§ 8. Do hereby proclaim Saturday March 18, 2023, as Public Transit Professional Appreciation Day in the City of Norman Invite members of the public to share their appreciation for these professionals as they make use of EMBARK Norman services.

PASSED AND APPROVED this 14th day of March, 2023.

S M 1	ATTEST:	Larry Heikkila, Mayor	
	Brenda Hall, City Clerk		

File Attachments for Item:

3. CONSIDERATION OF ACKNOWLEDGEMENT, APPROVAL, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF THE CITY MANAGER'S CONTRACT AND CHANGE ORDER REPORT.



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 03/14/2023

REQUESTER: Brenda Hall, City Clerk

PRESENTER: Brenda Hall, City Clerk

ITEM TITLE: CONSIDERATION OF ACKNOWLEDGEMENT, APPROVAL,

REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF THE CITY

MANAGER'S CONTRACT AND CHANGE ORDER REPORT.



DATE:

December 2, 2022

TO:

Darrel Pyle, City Manager

FROM:

Brenda Hall, City Clerk

SUBJECT:

Contract K-2223-125 - The McKinney Partnership

Police Parking Lot

BACKGROUND: City Council, in its meeting of May 10, 2022, adopted Resolution R-2122-116 appropriating \$300,000 for the construction of an gated parking lot for the Police Department.

<u>DISCUSSION</u>: The current Police Department facility located at 201-B W Gray Street was built in 1984 with the Police Department, Municipal Court, and Communications occupying the facility in various states since that time. The facility currently provides parking for city assets and employees assigned in multiple designated parking lots, some of which are separated by active roadways. The current parking design provides no secured access or protections. While various efforts through the years have been made to provide limited visibility limitations and pedestrian access control to the facility, this has never been adequately accomplished.

The current assigned parking for the department lacks modern effective means to protect employees and city assets. The location is frequently visited by persons both on foot and in vehicles attempting to make entry into the facility, locate officers, and occasionally cause harm. The facility has been the location of aggressive, violent contacts, and is often the source of unauthorized access to the police facility. These concerns are significantly heightened for non-commissioned employees, guests, or injured officers who often find themselves confronting unknown persons in the parking area with limited or no warning.

Modern designs for law enforcement facilities include secured access controlled parking for employees and department assets. Norman Police Department is an outlier in our region for not providing such a facility. This project will correct these concerns by providing security fencing, access control, lighting, additional parking, and two additional access points into the facility. Additionally, the project will allow for all department parking to take place adjacent to the facility, an especially important factor provided the anticipated increase in traffic resulting from future road projects. The project will allow for increased security of the facility, employees, and critical City assets necessary for completion of the departments mission.

Funds are budgeted in the Municipal Complex Renovation/Expansion, Design (Project BG0075; account 50196644-46201).

RECOMMENDATION: Staff recommends Contract K-2223-125 with The McKinney Partnership in the amount of \$23,250 for the design of the parking lot be approved.

Approved Date

Not approved

Date



November 28, 2022

Mrs. Brenda Hall City Clerk City of Norman 201 West Gray Street Norman, OK 73070

K-2223-125

Re: Proposal of Architectural Services

City of Norman Police Parking Lot Renovations

Norman, Oklahoma

Mrs. Hall:

We appreciate this opportunity to submit to the City of Norman our Proposal of Architectural Services relating to City of Norman Police Parking Lot Renovations. We propose the following Scope, Outline of Services, and Fee Structure for this work:

PROJECT UNDERSTANDING

Proposed Scope

Design of renovations to existing City of Norman Police parking lot including addition of new vinyl coated fencing w/ privacy slats, two new automatic vehicle gates, one new manual vehicle gate, one new man gate, new lighting, and two new building entry doors.

Article 1 BASE ARCHITECTURAL SERVICES

3600 West Main Suite 200 Norman, Oklahoma 73072 405.360.1400 p 405.364.8287 f tmparch.com

Schematic Design

1.01 Design will be based on attached Schematic Design drawings dated May 27, 2022.

Construction Documents

- 1.02 Prepare Construction Documents for permitting, bidding, and construction including but not limited to Demo Plan, Site Plans, Elevations, Misc. Details, and Specifications.
- 1.03 Coordinate and provide Electrical Engineering.
- 1.04 Submit final documents to City of Norman for permitting and incorporate any comments as required for approval and issuance of building permit.

Bidding and Negotiations

- 1.05 Assist the City of Norman in issuance of plans to CM for bidding.
- 1.06 Respond to Requests for Information (RFIs) and issue Addenda as required during bidding.
- 1.07 Attend bid opening, review bids and CM's Guaranteed Maximum Price (GMP).

Construction Observation

- 1.08 Respond to RFIs from CM and render decisions relating to matters of compliance or interpretation of the documents in conjunction with the City of Norman.
- 1.09 Review of Shop Drawings and Submittals.
- 1.10 Review the construction at intervals required for life safety and code compliance estimated at two (2) site visits per month and two (2) Owner/Architect/Contractor meetings per month.
- 1.11 Preparation and distribution of written field reports and photo-documentation of each site visit.
- 1.12 Conduct final Punch List inspection with City of Norman and CM. Conduct final inspection to verify satisfactory completion of the work.
- 1.13 Review CM's Change Order Requests (CORs) and issue Change Orders and Work Directives during construction as required.
- 1.14 Issue Certificate of Substantial Completion.
- 1.15 Conduct 11-month post-completion inspection of the work prior to CM's 12-month warranty expiration.

Article 2 OWNER RESPONSIBILITIES:

- 2.01 Provide programming requirements and information relating to current and projected municipal departmental needs including areas, staffing projections, uses, adjacencies and current operations.
- 2.02 Property Survey (Survey already completed for fee of \$4,500.00).
- 2.03 Building Permit fees.
- 2.04 Special Inspection fees (if required).
- 2.05 Review documents as needed to convey changes and instructions to the Architect.
- 2.06 Provide written approval at all stages of the project.

Article 3 ADDITIONAL SERVICES:

- 3.01 Changes or Value Engineering in the project at the Owner's request after previous phases have been approved by the Owner when such changes require additional work by the Architect or their Consultants.
- 3.02 Civil Engineering (Hourly not-to-exceed \$3,000.00. The original Owner/Architect Agreement has an allowance of \$30,000.00 for civil engineering).
- 3.03 3-D renderings.
- 3.04 Signage design.
- 3.05 Additional construction observation required beyond the contracted completion due to no fault of the Architect. Architect shall invoice the Owner who should recover any additional costs from the Contractor.
- 3.06 As-built verification after construction is completed.
- 3.07 Detailed cost estimates or opinions of probable costs.

Article 4 ARCHITECTURAL FEES

4.01 Architectural Fee for Basic Services shall be a lump sum fee of \$22,250.00 for Police Parking Lot Renovations. Detailed fee breakdown below:

7.5% of estimated \$250,000.00 construction budget \$ 18,750.00 Electrical Engineering Fee \$ 4,500.00 Fee \$ 23,250.00

- 4.02 Fees for Additional Services shall be billed hourly at the rates listed in Attachment "A".
- 4.03 Should the scope or design change after previous approvals have been granted, fees shall be adjusted for any additional work required by the Architect or its consultants.

Article 5 ARCHITECTURAL FEE PAYMENT

- 5.01 Fees for Basic Services shall be billed monthly based on the percentage of completion and shall be due and payable within thirty days of the date of invoice.
- 5.02 Fees for Additional Services shall be billed hourly at the rates listed in Attachment "A" in addition to fees noted in Article 5.01 or at a negotiated lump sum fee.
- 5.03 Should the Project be canceled prior to completion, only the fees for services performed and reimbursable expenses accrued up to the time of Architect's receipt of written notice to cease work shall be due and payable.
- 5.04 Reimbursable Expenses and expenses pertaining to Additional Services shall be submitted in addition to the invoices for Basic Services.

Article 6 REIMBURSABLE EXPENSES

Reimbursable expenses shall be billed at one point one (1.1) times our cost in addition to the progress fee billings and include but are not necessarily limited to the following:

- 6.01 Cost of reproduction (prints, CAD plots and photocopies) as required to perform services. The cost of bid documents will be paid by contractors.
- 6.02 Mileage at current IRS rates.
- 6.03 Expenses of overtime work (1.5 times base hourly rate) if required and authorized in advance by the Owner.

If you have any questions, please advise. If this Proposal meets with your approval, please execute, and return one copy our records.

We appreciate this opportunity to be of continued service to the City of Norman and look forward to assisting you with this project.

Respectfully,

Proposal of Architectural Services – Police Parking Lot Renovations November 28, 2022 Page 5 of 5

Pichard S. McKinnov, Ir. AIA

Richard S. McKinney, Jr., AIA President

Attachment A TMP Hourly Billing Rates

Attachment B Schematic Design Documents

ATTEST:

Corporate Secretary, The McKinney Partnership Architects, P.C.

THE CITY OF NORMAN, OKLAHOMA ("CITY")

Mayor

ATTEST:

City Clerk

Approved as to form and legality this

OF NORM SEAL

and day of de

2022.

eity Attorney

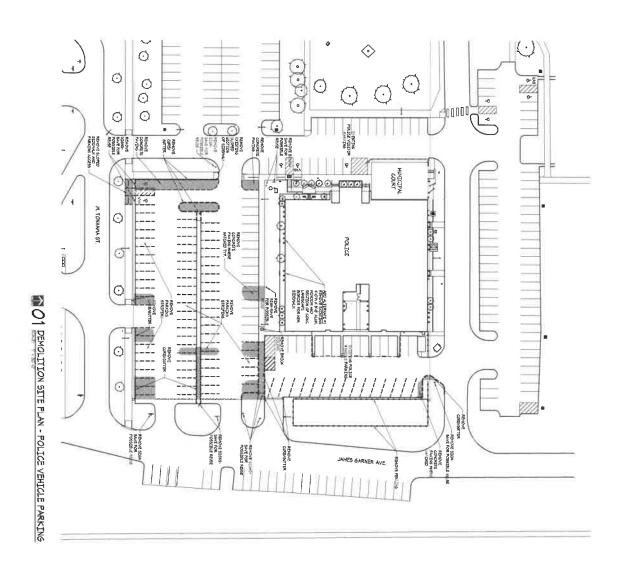
ATTACHMENT A

THE MCKINNEY PARTNERSHIP ARCHITECTS STANDARD HOURLY BILLING RATES

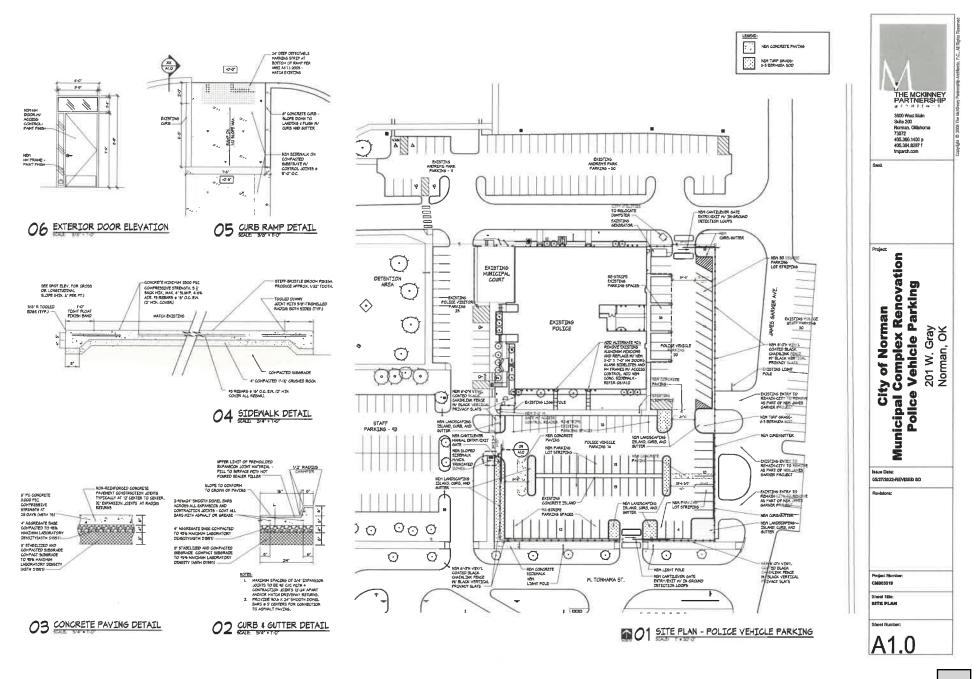
Principal	\$ 200.00
Senior Architect	\$ 180.00
Project Architect	\$ 110.00
Project Staff	\$ 80.00
Project Support Staff	\$ 70.00
Administrative Staff	\$ 75.00
Clerical	\$ 50.00

Hourly rates may be adjusted without notice based upon annual employee reviews and salary adjustments.

Attachment B



City of Norman City of Norman Municipal Complex Renovation Police Vehicle Parking 201 W. Gray Norman, OK	HE MCKINNEY PARTYMERSHIP PARTYMERSHIP Soover Man Soover
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File Attachments for Item:

4. CONSIDERATION OF ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF A DONATION IN THE AMOUNT OF \$22,594.50 FROM THE ESTATE OF LINDA LEE WALLER TO BE USED AT THE NORMAN ANIMAL WELFARE CENTER WITH FUNDS TO BE DEPOSITED AS OUTLINED IN THE STAFF REPORT.



THE CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 03/14/2023

REQUESTER: Kellee Robertson, Manager, Animal Welfare Division

PRESENTER: Kevin Foster, Chief of Police

ITEM TITLE: CONSIDERATION OF ACCEPTANCE, REJECTION, AMENDMENT,

AND/OR POSTPONEMENT OF A DONATION IN THE AMOUNT OF \$22,594.50 FROM THE ESTATE OF LINDA LEE WALLER TO BE USED AT THE NORMAN ANIMAL WELFARE CENTER WITH FUNDS TO BE

DEPOSITED AS OUTLINED IN THE STAFF REPORT.

BACKGROUND:

Section 8-111 of the City Code requires that the City Council accept any donation over \$250 before use or disbursement. The Norman Animal Welfare Center often receives general, unsolicited donations for unspecified uses. These donations are accepted and deposited within a dedicated account, where they are maintained until requested and approved for disbursement for use by our facility.

The City of Norman Animal Welfare Center has been designated as a devisee and legatee in the Estate of Linda Lee Waller. A Petition for Probate of Will, Appointment of Personal Representative, Determination of Heirs, Devisees, and Legatees, and Waiver of General Inventory and Appraisement was filed by Gregory T. Tontz in the District Court of Cleveland County, Oklahoma, on August 4, 2022.

DISCUSSION:

Ms. Waller died on July 12, 2022 and was a Cleveland County resident. She died a single person with no heirs. Under the terms of her Last Will and Testament, Ms. Waller's property was to be distributed in equal shares to the Oklahoma Medical Research Foundation and the City of Norman Animal Welfare Department, free and clear of any restrictions.

An Order Allowing Final Account, Determination of Heirs, Devisees, Legatees, and Distribution of Estate was filed in the Cleveland County District Court on February 16, 2023, authorizing the Personal Representative to distribute the proceeds to the Norman Animal Welfare Center. On March 6, 2023, the Norman Animal Welfare Center received a check for \$22,594.50.

RECOMMENDATION:

It is recommended that the City Council accept the donation of \$22,594.50 and the money be deposited into Animal Welfare Miscellaneous Revenues/Contributions/Donations (account 10-22431).

File Attachments for Item:

5. CONSIDERATION OF ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF EASEMENT E-2223-25: A PERMANENT SANITARY SEWER EASEMENT DONATED BY ASHTON GROVE MASTER ASSOCIATION, INC., FOR THE ASHTON GROVE LIFT STATION UPGRADES.



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 3/14/2023

REQUESTER: Nathan Madenwald, Utilities Engineer

PRESENTER: Nathn Madenwald, Utilities Engineer

ITEM TITLE: CONSIDERATION OF ACCEPTANCE, REJECTION, AMENDMENT, AND/OR

<u>POSTPONEMENT OF EASEMENT E-2223-25</u>: A PERMANENT SANITARY SEWER EASEMENT DONATED BY ASHTON GROVE MASTER ASSOCIATION,

INC., FOR THE ASHTON GROVE LIFT STATION UPGRADES.

BACKGROUND:

The Ashton Grove Lift Station was constructed in 2003 at the northwest corner of 48th Avenue NW and Rock Creek Road to provide sewer service to development in northwest Norman. However, this station was approved and constructed without a temporary storage basin or emergency generator to maintain service to customers during power outages. To meet current Department of Environmental Quality requirements and to provide more resilient sewer service, staff has budgeted and planned to install an emergency generator at this location to provide power to the station during inclement weather and outages.

DISCUSSION:

Staff have worked with the current property owner, Ashton Grove Master Association, Inc., to obtain an easement to slightly expand the footprint of the lift station. The easement is 15 feet in width for sanitary sewer use only and will allow sufficient room for the required emergency generator.

The Ashton Grove Master Association, Inc., donated the easement. Staff recommends acceptance of this easement.

RECOMMENDATION:

Staff recommends acceptance of Easement E-2223-25 from the Ashton Grove Master Association, Inc.

Easement E-2223-25

SANITARY SEWER EASEMENT

Know all men by these presents:

That Ashton Grove Master Association, Inc., in consideration of the sum of One Dollar (\$1.00), receipt of which is hereby acknowledged, and for other good and valuable considerations, do hereby grant, bargain, sell, and convey unto the City of Norman, a municipal corporation, a sanitary sewer easement and right-of-way over, across, and under the following described premises situated in the City of Norman, Cleveland County, Oklahoma, to wit:

See Exhibit A

With the right of ingress and egress to and from the same, for the purpose of surveying, laying out, constructing, maintaining, and operating the following public utility(ies) to wit:

SANITA	RY SEWER
To have and to hold the same unto the said city, its successo	ors, and assigns forever.
Signed and delivered this 13 f day of February	7 , 2023.
(OWNER NAME) by:	
Hossein Farzaneh	President Title
Hossein Farzanen	Title
REPRESENTATIVE A	CKNOWLEDGEMENT
STATE OF OKLAHOMA, COUNTY OF CLEVELAND, SS:	
of Ashron Great Master Assec, to me known	for said County and State, on this 13th day of PRESIDENT to be the identical person(s) who executed the foregoing grant executed the same as free and voluntary
WITNESS my hand and seal the day and year last above write My Commission Expires: 6/3/2025	MILLY JOAN OF THE
Approved as to form and legality this day of	Z Commission # O
	City Attorney
Approved and accepted by the Council of the City of Norma	n, this, day of
ATTEST:	
City Clerk	Mayor

LEGAL DESCRIPTION ASHTON GROVE ADDITION LIFT STATION – 15' UTILITY EASEMENT NORMAN, CLEVELAND COUNTY, OKLAHOMA

A 15.00 feet wide utility easement lying in the Southwest Quarter (S.W. ¼) of Section Fifteen (15), Township Nine (9) North, Range Three (3) West of the Indian Meridian, Cleveland County, Oklahoma being more particularly described as follows:

COMMENCING at the Southwest corner of said S.W. 1/4;

THENCE North 89°38'21" East along the South line of said S.W. ¼ a distance of 100.00 feet:

THENCE North 00°21'39" West a distance of 50.00 feet to the **POINT OF BEGINNING**, said point being a point on the North right-of-way line of Rock Creek Rd.;

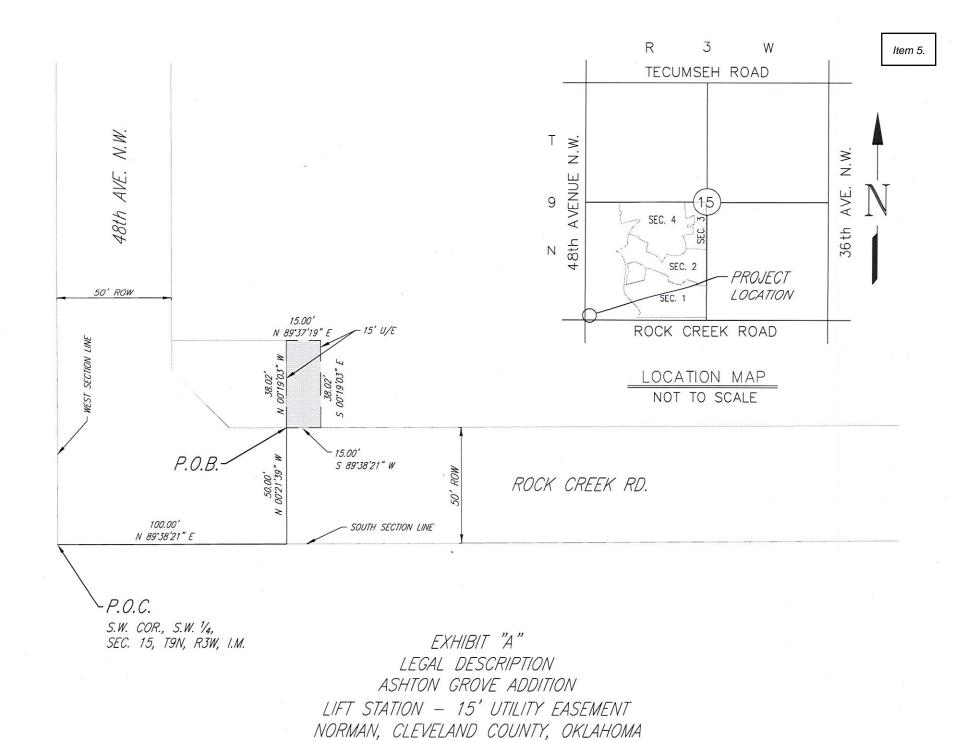
THENCE North 00°19'03" West a distance of 38.02 feet;

THENCE North 89°37'19" East a distance of 15.00 feet;

THENCE South 00°19'03" East a distance of 38.02 feet to a point on said North right-of-way line of Rock Creek Rd.;

THENCE South 89°38'21" West along said North right-of-way line a distance of 15.00 feet to the **POINT OF BEGINNING.**

Said easement contains 0.01 acres, more or less.



File Attachments for Item:

6. CONSIDERATION OF APPROVAL, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF AMENDMENT NO. TWO TO CONTRACT K-1213-163: BY AND BETWEEN THE CITY OF NORMAN, OKLAHOMA, AND GARVER, L.L.C., INCREASING THE CONTRACT AMOUNT BY \$9,231 FOR A REVISED CONTRACT AMOUNT OF \$128,106 TO PROVIDE ENGINEERING DESIGN SERVICES FOR STREET WIDENING AND TRAFFIC SIGNAL IMPROVEMENTS AT THE 12TH AVENUE N.E., AND HIGH MEADOWS DRIVE INTERSECTION; AND BUDGET APPROPRIATION AS OUTLINED IN THE STAFF REPORT.



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 03/14/2023

REQUESTER: Katherine Coffin

PRESENTER: David Riesland, Transportation Engineer

ITEM TITLE: CONSIDERATION OF APPROVAL, REJECTION, AMENDMENT, AND/OR

POSTPONEMENT OF AMENDMENT NO. TWO TO CONTRACT K-1213-163: BY AND BETWEEN THE CITY OF NORMAN, OKLAHOMA, AND GARVER, L.L.C., INCREASING THE CONTRACT AMOUNT BY \$9,231 FOR A REVISED CONTRACT AMOUNT OF \$128,106 TO PROVIDE ENGINEERING DESIGN SERVICES FOR STREET WIDENING AND TRAFFIC SIGNAL IMPROVEMENTS AT THE 12TH AVENUE N.E., AND HIGH MEADOWS DRIVE INTERSECTION; AND BUDGET

APPROPRIATION AS OUTLINED IN THE STAFF REPORT.

BACKGROUND:

The intersection of 12th Avenue NE and High Meadows Drive is a three-legged intersection that was signalized in 1993, but without roadway improvements to provide a southbound left turn on 12th Avenue NE onto High Meadows Drive. The intersection is located north of Robinson Street with High Meadows Drive providing access to Eisenhower Elementary School and surrounding residential neighborhoods. The ever-increasing volume of traffic and the resulting increase of collisions have exposed the need for a dedicated turn lane and new traffic signals at this intersection. An aerial photo of this area is included as Attachment 1.

Installing the southbound left turn lane requires widening of the existing four-lane section at the intersection. This project also provides the opportunity for the City to upgrade the signal interconnect system along 12th Avenue NE with fiber optic cable between Robinson Street and Rock Creek Road.

This section of 12th Avenue NE in Norman also serves as U.S. Highway 77. The Oklahoma Department of Transportation (ODOT) maintains jurisdiction over maintenance and improvements to the highway. However, 12th Avenue NE also serves as a major arterial street in Norman and intersects with many other city streets. While the City is responsible for the design of intersection signalization projects on 12th Avenue NE, future construction must be coordinated with ODOT.

On February 26, 2013, City Council approved Contract K-1213-163 with Garver, LLC in the amount of \$38,900 to design the roadway and traffic signal modifications necessary to add a dedicated left turn lane and a southbound protected left turn arrow display. On November 25,

2015, City Council approved Resolution R-1415-59, which was later forwarded to the Oklahoma Department of Transportation (ODOT), requesting federal funds to pay for 80% of the construction cost. In the resolution, the City agreed to the terms and conditions of a federally funded project by stating its willingness to assume the responsibility for the preparation of engineering plans, the purchase of any required additional rights-of-way, the relocation of public utilities and funding of the local share of the construction cost.

On August 1, 2017, City Council held a study session to discuss the Griffin Park Sports Complex Master Plan, which includes additional improvements to the adjacent transportation network.

DISCUSSION:

One of the transportation network improvements recommended in the Griffin Park Sports Complex Master Plan calls for a new access point off of 12th Avenue NE (see Attachment 2). This new access affects the on-going design of the improvements at the High Meadows intersection.

On September 26, 2017, City Council approved Amendment No. One with Garver, L.L.C., in the amount of \$79,975 to provide engineering services to development construction plans for street widening improvements and replacement of traffic signals at 12th Avenue N.E., at the High Meadows intersection.

City staff worked with the firm (PDG) that is developing the Griffin Park Sports Complex Plan to identify the safest and most appropriate access point while considering the restrictions for arterial roadways (of which 12th Avenue NE is one) outlined in the City's Engineering Design Criteria. This discussion led to the identification of the most appropriate and safest access point, which takes advantage of the traffic signal at the High Meadows Drive intersection, adding a fourth leg to the existing three-legged intersection.

In order to accommodate the new access, 12th Avenue NE will need to be widened south of High Meadows Drive to create a northbound left turn lane. Additionally, the traffic signal will need to be further modified to include a fourth pole and mast arm for eastbound traffic exiting Griffin Park. Including this work as part of the ongoing project will save money in the long run, minimize the traffic congestion associated with road construction and avoid having to reconstruct parts of the roadway, while at the same time leveraging federal funds to complete the work.

Garver, LLC proposes a \$9,231 amendment to Contract K-1213-163 to finalize the design for the modifications to the 12th Avenue NE and High Meadows Drive intersection (see Contract Amendment 2 in Attachment 3). The services will include updating the plans to the latest ODOT standards, modification to the prior design for the southbound left-turn lane, and modification to a drainage structure located near the southwest corner of the intersection, as well as the additional project management support associated with this work. The majority of this work has already been completed as construction of the intersection improvements is scheduled to bid on March 2, 2023.

Funds are available in the 12th Avenue NE and High Meadows Project, Design (Account 50590079-46201; Project TR0051).

RECOMMENDATION:

Staff recommends approval of Amendment 2 to Contract K-1213-163 with Garver, LLC in the amount of \$9,231 for design services associated with the completion of the plans for the modifications to 12th Avenue NE intersection with and High Meadows Drive.

AMENDMENT NO. 2 AGREEMENT FOR PROFESSIONAL SERVICES

This is an amendment, AMENDMENT NO. 2, attached to and made a part of the AGREEMENT, dated February 26, 2013, between the City of Norman (OWNER) and Garver, LLC (CONSULTANT) for professional engineering services as necessary to revise construction plans and specifications for the improvements at the intersection of 12th Avenue NE and High Meadows Drive.

WHEREAS, the OWNER has requested updating the plans to the latest ODOT standards, and

WHEREAS, the OWNER has requested a reduction in the southbound left-turn bay length, and

WHEREAS, the OWNER has requested modifications to the drainage structure extension into Griffin Park,

WHEREAS, all provisions of Contract No. K-1213-163 not in conflict with this amendment shall hereinafter remain in full force and effect,

WHEREAS, CONSULTANT is prepared to provide additional services in support of the project;

NOW THEREFORE, in consideration of the promises contained in said AGREEMENT and this AMENDMENT NO. 2, OWNER and CONSULTANT agree as follows:

ARTICLE 3 - SCOPE OF SERVICES

CONSULTANT shall provide the additional services described in Attachment A, Scope of Services, which attachment supplements the original Agreement and attachments.

ARTICLE 4 – COMPENSATION

OWNER shall pay CONSULTANT <u>Nine Thousand Two Hundred Thirty-One Dollars (\$9,231)</u> for additional services in accordance with Attachment B, Compensation, which attachment supplements the original Agreement and attachments. Invoices shall be due and payable upon receipt. OWNER shall give prompt written notice of any disputed amount and shall pay the remaining amount.

K-1213-163

IN WITNESS WHEREOF, OWNER and Gar	ver, LLC have executed this Amendment No. 2.
DATED thisthe day of, 2023.	
The City of Norman (OWNER)	Garver, LLC (CONSULTANT)
Signature	Signature Mcc 3
Name	Name Nicci Tiner
Title	Title Vice President
Date	Date 2-/3-23
Attest:	Attest:
City Clerk	John Ruddell, Vice Pres.
Approved as to form and legality this 6	y of <u>Hardy</u> 2023.
City Attorney	

ATTACHMENT A - SCOPE OF SERVICES

1. General

The OWNER has requested updating the plans to the latest ODOT standards at the intersection of 12th Avenue NE and High Meadows Drive, shortening the southbound left-turn lane, and modifying the drainage structure into Griffin Park. These changes require modifications to the construction plans. Specific tasks necessary to accomplish this modification will consist primarily of the following:

2. Updates to Latest ODOT Standards

Construction plans will be updated to the ODOT 2019 Specifications and Pay Items. Additionally, City of Norman notes will be updated to conform with the City's latest standards.

3. Reduction of Southbound Left-Turn Lane

Construction plans will be updated to reduce the southbound left-turn lane storage from 450 feet to 300 feet. This modification resulted in changes to the cross-sections and the pavement marking plans.

4. Modification to Drainage Structure

Construction plans will be modified to eliminate details for the RCB extension. A detail to close the current inlet opening in the top of the existing RCB where the existing curb inlet drains into the existing RCB will be added. Due to the changes, the Structure 1 typical section, details and x-section to reflect tying into existing RCB will be modified. The sidewalk over the RCB will now be part of this project. The profile will be revised to show tying the new storm sewer into Structure 1 instead of RCB.

5. Project Deliverables

The following will be submitted to the Owner, or others as indicated, by Garver:

- 1. PDF version of 90% construction plans, quantity calculations, and opinion of probable cost.
- 2. PDF version of final construction plans, quantity calculations, opinion of probable cost, and special provisions.
- 3. Electronic copies of final construction plans, quantity calculations, opinion of probable cost, and special provisions.
- 4. Electronic copy of as-built plans.

6. Extra Work

The following items are not included under this agreement but will be considered as extra work:

- 1. Redesign for the Owner's convenience or due to changed conditions after previous alternate direction and/or approval.
- 2. Submittals or deliverables in addition to those listed herein.
- 3. Design of any utility relocations
- 4. Utility potholing
- 5. Construction materials testing.
- 6. Front end sections of construction contract documents.
- 7. Plans for construction easements (temporary and/or permanent) or drainage easements.
- 8. Right-of-way acquisition documents.
- 9. Environmental Handling and Documentation.

Extra Work will be as directed by the Owner in writing for an additional fee as agreed upon by the Owner and Garver.

ATTACHMENT B K-1213-163

CITY OF NORMAN 12TH AVENUE NE AND HIGH MEADOWS DRIVE

PROJECT DESCRIPTION:

The OWNER has determined that the plans should be updated to the latest standards. Additionally, the City has requested that the turn lane be reduced and the outfall structure extension be removed.

FEE SUMMARY:

Labor	Man-Hours	Total	
I. Project Management	3	\$583.00	
P. Final Signal Plans	7	\$992.00	
3. Final Roadway Plans	53	\$7,652.00	
Total Labor	63	\$9,227.00	

Expenses	Amount
1. Project Management	\$4.00
2. Final Signal Plans 3. Final Roadway Plans	\$0.00 \$0.00
Total Expenses	\$4.00

GRAND TOTAL LUMP SUM FEE:

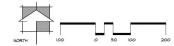
\$9,231.00





Griffin Sports Complex Amenities

- 1 Indoor Training Facility
- 2 Future Building Expansion
- 3 Concession/Restroom
- 4 Restroom Building
- 5 Soccer Plaza Area
- 6 Playground Area
- 7 Entry Sign
- 8 Shade Structure (Typ)
- 9 Premier Field Plaza
- 10 Entry Plaza
- 11 Drop-off Area
- 12 Existing Soccer Office
- 13 Existing Maintenance Building
- 14 Existing Pump House
- 15 Silos
- 16 Existing Walls
- 17 Proposed Walls
- 18 Park Area
- 19 Playground & Splash Pad
- 20 Trail
- 21 Sutton Wilderness Trail
- 22 Pedestrian Bridge
- 23 Existing Dog Park
- 24 Existing Pavilion
- 25 Existing Restroom
- 26 Fishing Dock







File Attachments for Item:

7. CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF CHANGE ORDER NO. FOUR TO CONTRACT K-2021-10: BY AND BETWEEN THE NORMAN MUNICIPAL AUTHORITY AND LANDMARK CONSTRUCTION GROUP, L.L.C., INCREASING THE CONTRACT AMOUNT BY \$2,439 FOR A REVISED CONTRACT AMOUNT OF \$2,431,645 AND ADDING 90 CALENDAR DAYS TO THE CONTRACT FOR THE HOUSEHOLD HAZARDOUS WASTE AND CONTAINER MAINTENANCE FACILITIES PROJECT, FINAL ACCEPTANCE OF THE PROJECT, AND FINAL PAYMENT IN THE AMOUNT OF \$30,840.22.



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 3/14/2023

REQUESTER: Nathan Madenwald, Utilities Engineer

PRESENTER: Nathan Madenwald, Utilities Engineer

ITEM TITLE: CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION,

AMENDMENT, AND/OR POSTPONEMENT OF CHANGE ORDER NO. FOUR TO CONTRACT K-2021-10: BY AND BETWEEN THE NORMAN MUNICIPAL AUTHORITY AND LANDMARK CONSTRUCTION GROUP, L.L.C., INCREASING THE CONTRACT AMOUNT BY \$2,439 FOR A REVISED CONTRACT AMOUNT OF \$2,431,645 AND ADDING 90 CALENDAR DAYS TO THE CONTRACT FOR THE HOUSEHOLD HAZARDOUS WASTE AND CONTAINER MAINTENANCE FACILITIES PROJECT, FINAL ACCEPTANCE OF THE PROJECT, AND FINAL

PAYMENT IN THE AMOUNT OF \$30,840.22.

BACKGROUND:

The Sanitation Division for the City of Norman utilizes dumpsters for collection and disposal of solid waste from non-residential facilities. Dumpsters require regular maintenance to address corrosion and general deterioration. However, the current facilities are inadequate and do not meet industry standards for welding and painting operations. The new container maintenance facility will provide a safe, efficient building to allow for welding and painting of solid waste dumpsters and containers. With the increased maintenance, capital cost reductions for the division will be achieved. The facility will be located north of the Water Reclamation Facility.

The new household hazardous waste facility will provide a safe, year-round disposal option for our citizens that is environmentally friendly. The current operation is an annual collection event where citizens can dispose of approved wastes that have been accumulated throughout the year. The new facility will not require citizens to store wastes throughout the year if not needed.

Contract K-1920-15 was awarded to Studio Architecture on July 9, 2019, in the amount of \$206,700 to proceed with the design, bidding, construction administration, and as-built services for the project. Under this contract, a new truck wash facility, a new container maintenance facility, and a new household hazardous waste facility were to be designed to allow for the Sanitation and Environmental Services Divisions to more efficiently accomplish their mission. However, pursuant to the City taking over the public transit system in Norman and building a new vehicle proposed wash facility, the truck wash facility under this contract has been put on hold. The container maintenance facility and household hazardous waste facility were still

designed pursuant to the contract. Amendment No. 1 for \$15,000 was approved by the NMA on Feb 25, 2020, and authorized additional survey and additional paving modifications at the Transfer Station.

Contract K-2021-10 was awarded to Landmark Construction Group, LLC in the amount of \$2,327,300 for the construction of the Household Hazardous Waste and Container Maintenance Facilities. Change Order No. 1 was approved by the City Manager on April 29, 2022 in the amount of \$38,194. Change Order No. 2 was approved by City Council on May 24, 2022 in the amount of \$50,314. Change Order No. 3 was approved by the City Manager on August 1, 2022 in the amount of \$13,398.

DISCUSSION:

The proposed Change Order No. 4 includes replacement of the smoke detectors within the Container Maintenance Facility with heat sensors. The smoke detectors were being triggered by normal facility operations. Additionally, 90 days of contract time is proposed for this work.

As shown in the change order, the overall project cost will increase by a total of \$2,439.00 or approximately 0.10% above the original contract amount. Funding for the proposed change order will be \$2,439.00 from Container Maintenance facility construction account (33999975-46101 / Project SA0009) which has an available balance of \$36,932.36.

Approval of Change Order No. 4 is recommended by the Architect.

RECOMMENDATION:

Staff recommends the NMA approve Change Order No. 4 for Contract K-2021-10 with Landmark Construction Group, LLC in the amount of \$2,439 for a revised contract amount of \$2,431,645.00 for Project SA0012/SA0009 — Household Hazardous Waste and Container Maintenance Facilities, accept the project, and authorize final payment in the amount of \$30,840.22 to Landmark Construction Group, LLC.

NORMAN MUNICIPAL AUTHORITY CITY OF NORMAN CLEVELAND COUNTY, OKLAHOMA

DATE:	January 31, 2023						
CHANGE ORDER NO.:	Four (4) - Final	Four (4) - Final					
CONTRACT NO.:	K-2021-10	K-2021-10					
PROJECT:	SA0012/SA0009 - I	SA0012/SA0009 - HHW and CM Facilities					
CONTRACTOR:	Landmark Constru	ction Group, LLC					
	13301 N Sante Fe	Ave, OKC, OK 73114	1				
	Contract Time		Contract Amount				
ORIGINAL:	240	calendar days	\$2,327,300.00				
PREVIOUS CHANGE ORDERS:	285	calendar days	\$101,906.00				
THIS CHANGE ORDER:	90	calendar days	\$2,439.00	0.10%			
REVISED AMOUNT:	615	calendar days	\$2,431,645.00	0.10/8			
ORIGINAL START DATE:	March 1, 2021	***************************************	42,232,043.00				
ORIGINAL COMPLETION DATE:	October 27, 2021						
PREVIOUS COMPLETION DATE:	August 8, 2022						
NEW COMPLETION DATE:	November 6, 2022	!					
DESCRIPTION	:	I	Increase / Decrease (5)				
Work at the Container Maintenance Facil smoke detectors with heat detectors and time.		t	2,439.00				
Landmark Construction Group, LLC agrees	s to complete the work as a	mended and modif	ied by Change Order No	o. 4 as described			
SUBMITTED BY CONTRACTOR:	Landmark Construc	ction Group, LLC	Date: _,	1/31/2023			
RECOMMENDED BY ARCHITECT/ENGINEER:	George Winters, St	Juntus Judio Architecture	Date:	02/16/2023			
APPROVED AS TO FORM AND LEGALITY:	City Attorney		Date:				
ACCEPTED BY NORMAN UTILITIES AUTHORITY:	Chairman		Date:				

Change Order	r No. 4	1						Page 2 of
Contract K-20								
		-1	Attachment	11				
		T						
CHANGE ORE	DER PAY ITEMS							
NUMBER	DESCRIPTION	UNIT	CURRENT CONTRACT AMOUNT	UNIT PRICE	ORIGINAL CONTRACT AMOUNT	QUANTITY INCREASE / DECREASE	COST INCREASE	PERCENT CHANGE
	Replacement of Smoke Detectors in Container							
CO4-1	Maintenance Building with Heat Detectors (PCO 38)	LS	0	\$0.00	\$0	1,00	\$2,439.00	N/A
SUBTOTAL					\$0		\$2,439.00	
DOIOIAL								
	Original Contract Amount				\$2,327,300.00			
	Change Order No. 1				\$38,194.00	1.64%		
	Change Order No. 2				\$50,314.00	2.16%		
	Change Order No. 3				\$13,398.00	0.58%		
	Change Order No. 4	1			\$2,439.00	0.10%		
	Final Contract Amount				\$2,431,645.00			

File Attachments for Item:

8. CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF CONTRACT K-2223-75: A CONTRACT BY AND BETWEEN NORMAN UTILITIES AUTHORITY AND GARVER, L.L.C., IN THE AMOUNT OF \$196,190 TO PROVIDE PROFESSIONAL ENGINEERING MODELING SERVICES FOR THE LAKE THUNDERBIRD PREDICTIVE LAKE OPTIMIZATION TOOL (PLOT) PROJECT AND BUDGET TRANSFER FROM WATER RECLAMATION FUND BALANCE TO PROJECT ACCOUNT.



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 02/28/2023

REQUESTER: Ken Giannone, PE

PRESENTER: Ken Giannone, PE, Capital Projects Engineer

ITEM TITLE: CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION,

AMENDMENT, AND/OR POSTPONEMENT OF CONTRACT K-2223-75: A CONTRACT BY AND BETWEEN NORMAN UTILITIES AUTHORITY AND GARVER, L.L.C., IN THE AMOUNT OF \$196,190 TO PROVIDE PROFESSIONAL ENGINEERING MODELING SERVICES FOR THE LAKE THUNDERBIRD PREDICTIVE LAKE OPTIMIZATION TOOL (PLOT) PROJECT AND BUDGET TRANSFER FROM WATER

RECLAMATION FUND BALANCE TO PROJECT ACCOUNT.

BACKGROUND:

In March 2012, the Norman Utilities Authority (NUA) approved Contract K-1112-114 for Carollo Engineers to prepare the <u>2060 Strategic Water Supply Plan</u> (the 2060 SWSP). The goal of the <u>2060 SWSP</u> was to strengthen our knowledge of potential short and long-term water supply source(s) for our community and begin implementation of a robust, water supply solution acceptable to the citizens of Norman.

In 2013, the 2060 SWSP Ad-Hoc Committee was created in order to ensure open and two-way dialogue with the community, to ensure the suggestions of the public were addressed, and to ensure that objectives and conclusions of the <u>2060 SWSP</u> were clearly communicated to the public. Eight meetings were held with the <u>2060 SWSP</u> Ad-hoc Committee and six public meetings were held for public participation and input in order to determine the portfolio of recommendations identified in the report that would be implemented. Ultimately, Resolution R-1314-146 was approved by the NUA on June 24, 2014. The approved portfolio had six (6) recommendations including the following:

"Implementation of indirect potable reuse (IPR) over time by adding additional treatment at the Water Reclamation Facility (WRF) and discharging the highly treated effluent into Lake Thunderbird; raw water conveyance and water treatment expansions would be required."

Since that time, NUA has made continuing efforts to confirm the technical and economic viability of IPR. Most recently from June 2021 through June 2022, NUA completed pilot testing of various advanced treatment technologies at WRF, and compilation of data and writing of the final report are ongoing. The intent of this pilot study was to obtain the following data:

- 1. Confirm that reliable technologies existed that could economically treat effluent at the WRF to the quality necessary for IPR.
- If one or more technologies are found that could economically meet the necessary water quality requirements, make recommendations for the best technology to be implemented at the WRF for IPR.

No. 2 above is relevant to this report because a critical step before concrete action is undertaken toward implementation of an IPR program will be to complete a financial analysis of IPR and compare its cost to other available options for meeting the City of Norman's long term water supply needs to determine if it is, indeed, the best solution for the City of Norman. This will be accomplished by preparing detailed estimates of the capital costs and long term operating costs of each viable alternative and comparing the net present values of each. If IPR remains the most economic option, NUA will commence further steps to implement it.

The above-discussed pilot study will furnish part of the information needed to complete this analysis as it will identify the best technology for advanced treatment at the WRF. This will allow for a detailed cost estimate of the capital cost and the operating cost for upgraded treatment technology at the WRF. However, there is a second piece to an IPR program that must be part of any economic analysis. Some combination of pump stations, force mains, and existing surface waterways must be used to transport highly treated effluent from the WRF to Lake Thunderbird. The capital cost and operating cost of these facilities must also be part of the net present worth analysis. In order to obtain these numbers, we must first quantify the size, capacity and level of resiliency necessary for these facilities, and, in order to come up with reasonable estimates for these parameters, it will be necessary to determine when, how often, and at what rate highly treated effluent would be pumped from the WRF to Lake Thunderbird as part of an IPR program.

It should also be noted that Oklahoma Department of Environmental Quality (ODEQ) has jurisdiction over water and wastewater treatment in the State of Oklahoma and that explicitly includes approval authority over any proposed IPR program. ODEQ has promulgated guidelines for such an approval, and one critical required step is the submission and approval of an Engineering Report that will detail all aspects of the proposed IPR program for ODEQ consideration. One key part of the Engineering Report must be a discussion of potential impacts of an IPR program on the public and the environment and how those impacts will be mitigated.

DISCUSSION:

NUA staff and NUA Consultant, Garver Engineering (Garver), have identified the creation of a Predictive Lake Optimization Tool (PLOT) for Lake Thunderbird as the best means both for confirming detailed specifications for pumping and conveyance infrastructure that would in turn allow for reasonable capital and operating cost estimates to be prepared as well as for reviewing and minimizing environmental impact to Lake Thunderbird of a proposed IPR program as required by ODEQ Guidelines. A PLOT uses precipitation, climatological and lake-specific data and trends to create a model that identifies the best times of year and best times of each day along with recommended pumping rates for IPR augmentation flows to a particular lake (which,

in the NUA's case, of course, is Lake Thunderbird) that will, in turn, optimize lake yield and conjunctive groundwater use as well as mitigate drought risks and their potential impact on the lake, its stakeholders and the environment.

After identifying the creation of a PLOT for Lake Thunderbird as a critical step in affirming the viability of IPR as means of helping NUA meet the City of Norman's future water supply needs, it was discovered that the United States Bureau of Reclamation (BOR) was offering WaterSMART (Sustain and Manage America's Resources for Tomorrow) Applied Science Grants to organizations like the NUA to assist them "to develop hydrologic information and water management tools and improve modeling and forecasting capabilities". Based on information regarding NUA's proposed PLOT project for Lake Thunderbird that was provided to BOR by NUA and NUA's consultant, Garver, BOR has approved an Applied Science Grant for NUA to complete a PLOT for Lake Thunderbird in collaboration with the National Water Research Institute. This grant will cover 50% of NUA's costs for creating the Lake Thunderbird PLOT to a maximum of \$148,339.00. On September 13, 2022, NUA approved Resolution R-2223-23, which accepted the Grant, as outlined in BOR Assistance Agreement R22AP00241 and authorized NUA staff to commence work on the PLOT including negotiating a Contract for Engineering Services with Garver to serve as the lead engineer on the PLOT project.

Since then, a Contract in the amount of \$196,190 for Engineering Services has been negotiated with Garver to create the PLOT. If approved, the net cost of this Contract to NUA, after factoring in the BOR Grant reimbursement of 50% of the cost of both the Garver Contract and in-kind services performed by NUA, is projected to be \$47,851.00 (\$196,190-\$148,339 = \$47,851).

Funds for this project would be obtained by transferring \$196,190.00 from the Water Reclamation Fund Balance to the WRF Reuse Pilot Study Project (WW0317, 32990048-46201). Reimbursements from the BOR Grant would be deposited back into the Water Reclamation Fund as they are received so the net impact on the fund after final reimbursement would be \$47,851.

RECOMMENDATION:

Approval of Contract K-2223-75 with Garver Engineering in the amount of \$196,190 for the Lake Thunderbird PLOT project and approval to appropriate funds from the Water Reclamation Fund Balance (32-29000) in the amount of \$196,190 into the WRF Reuse Pilot Study Project (WW0317-32990048-46201 Design).

AGREEMENT

FOR

ENGINEERING SERVICES

This AGREEMENT, between the Norman Utilities Authority (OWNER) and Garver, LLC (GARVER);

WITNESSETH

WHEREAS, OWNER intends to perform the PROJECT consisting of modeling efforts related to future processes at the Norman Water Reclamation Facility (WRF) as part of a Bureau of Reclamation WaterSMART Grant and Lake Thunderbird Basin Study.

WHEREAS, OWNER requires engineering services for assistance with reservoir level model development and a model results summary in connection with the PROJECT (the SERVICES); and,

WHEREAS, GARVER is prepared to provide said SERVICES; and.

NOW THEREFORE, in consideration of the promises contained in this AGREEMENT, OWNER and GARVER agree as follows:

ARTICLE 1 - EFFECTIVE DATE

The effective date of this AGREEMENT shall be ______

ARTICLE 2 - COMPLETION DATE

GARVER shall complete the SERVICES in accordance with Attachment A, Project Schedule.

ARTICLE 3 - GOVERNING LAW

The laws of the state of Oklahoma shall govern this AGREEMENT.

ARTICLE 4 - SERVICES TO BE PERFORMED BY ENGINEER

GARVER shall perform the SERVICES described in Attachment B, Scope of Services.

ARTICLE 5 - COMPENSATION

OWNER shall pay GARVER in accordance with Attachment C, Compensation.

ARTICLE 6 - OWNER'S RESPONSIBILITIES

- 6.1. <u>OWNER-Furnished Data:</u> Upon request, OWNER will provide to GARVER all data in OWNER's possession relating to GARVER 's SERVICES on the PROJECT. Such data may include operations reports, record drawings, and equipment manuals for the WRF. GARVER will reasonably rely upon the accuracy, timeliness, and completeness of the information provided by OWNER. OWNER's data is provided for temporary use or copying by GARVER.
- 6.2. <u>Access to Facilities and Property:</u> OWNER will make its facilities accessible to GARVER as required for ENGINEER's performance of its SERVICES
- 6.3. <u>Timely Review:</u> OWNER will examine GARVER's studies, reports, sketches, drawings, specifications, proposals, and other documents; and transmit OWNER comments or other decisions to GARVER in a timely manner.
- 6.4. <u>Meetings and Workshops:</u> OWNER will participate in progress meetings and workshops with GARVER or contractor(s) defined in Attachment B, Scope of Services.
- 6.5. <u>Advertisements, Permits, and Access:</u> Unless otherwise agreed to in the Scope of Services, OWNER will obtain, arrange, and pay for all advertisements for bids; permits and licenses required by local, state, or

- federal authorities; and land, easements, rights-of-way, and access necessary for GARVER 's SERVICES or PROJECT construction.
- 6.6. <u>Hazardous Substances</u>: If hazardous substances in any form are encountered or suspected, GARVER will stop its own work in the affected portions of the PROJECT to permit testing and evaluation. GARVER will, if requested by OWNER, conduct tests to determine the extent of the problem and will perform the necessary studies and recommend necessary remedial measures at an additional fee with contract terms to be negotiated.

ARTICLE 7 - STANDARD OF CARE

GARVER shall exercise the same degree of care skill and diligence in the performance of the SERVICES as is ordinarily possessed and exercised by a professional engineer under similar circumstances. GARVER shall correct the SERVICES that fail to satisfy this standard of care. No warranty, express or implied is included in this AGREEMENT or in any drawing, specifications, report or opinion produced pursuant to this AGREEMENT.

ARTICLE 8 - LIABILITY AND INDEMNIFICATION

- 8.1 General. Having considered the potential liabilities that may exist during the performance of the SERVICES, the benefits of the PROJECT, GARVER's fee for the SERVICES and in consideration of the promises contained in this AGREEMENT, OWNER and GARVER agree to allocate and limit such liabilities in accordance with this Article.
- 8.2 Indemnification and Liability. GARVER agrees to indemnify, and hold harmless the OWNER, its officers, servants, and employees, from and against legal liability for all claims, losses, damage, cost, and expense (including reasonable attorneys' fees and accountants' fees recoverable under applicable law) caused by a negligent act, error, or omission of GARVER in the performance of services under this Agreement. OWNER agrees to indemnify, and hold harmless GARVER, its officers, servants, and employees, from and against legal liability for all claims, losses, damage, cost, and expense (including reasonable attorneys' fees and accountants' fees recoverable under applicable law) caused by a negligent act, error, or omission of the OWNER in the performance of services under this Agreement, provided such indemnification shall be applicable only to the extent sovereign immunity has been waived pursuant to Oklahoma law. GARVER and the OWNER each agree to promptly service notice on the other party of any claims arising hereunder, and shall cooperate in the defense of such claims. The acceptance by OWNER or its representatives of any certification of insurance providing for coverage other than as required in this Agreement to be furnished by GARVER shall in no event be deemed a waiver of any of the provisions of this indemnity provision. None of the foregoing provisions shall deprive the OWNER of any action, right, or remedy otherwise available to OWNER at common law.
- 8.3 Employee Claims. GARVER shall indemnify OWNER against legal liability for damages arising out of claims by GARVER's employees. OWNER shall indemnify GARVER against legal liability for damages arising out of claims by OWNER's employees.
- 8.4 Consequential Damages. To the fullest extent permitted by law, GARVER shall not be liable to OWNER for any special, indirect or consequential damages resulting in any way from the performance of the SERVICES.
- 8.5 Notwithstanding any provision to the contrary herein, to the extent allowed by applicable law, GARVER'S (including its subconsultants, agents, assignees, affiliates and vendors) total aggregate liability under this AGREEMENT shall be limited to two (2) times the amount of compensation actually received by GARVER from OWNER under this AGREEMENT regardless of the cause or action (including negligence).
- 8.6 Survival. Upon completion of all SERVICES obligations and duties provided for in this AGREEMENT or if this AGREEMENT is terminated for any reason the terms and conditions of this Article shall survive.

ARTICLE 9 - INSURANCE

During the performance of the SERVICES under this AGREEMENT GARVER shall maintain the following insurance:

- 9.1 Worker's compensation insurance for GARVER's employees as required by Oklahoma Workers Compensation Statutes.
- 9.2 Comprehensive general liability insurance with a minimum of \$125,000 per accident for bodily injury or death and \$25,000 per occurrence for property damage.
- 9.3 Comprehensive automobile liability insurance with a minimum of \$125,000 per accident for bodily injury or death and \$25,000 for property damage.
- 9.4 Professional Liability (errors and omissions) insurance with a minimum policy value of \$1,000,000.

GARVER shall furnish OWNER certificates of insurance that shall include a provision that such insurance shall not be canceled without at least thirty days written notice to OWNER. All PROJECT contractors shall be required to include OWNER and GARVER as additional insured on their General Liability Insurance policies.

GARVER and OWNER each shall require its insurance carriers to waive all rights of subrogation against the other and its directors, officers, partners, commissioners, officials, agents and employees for damages covered by property insurance during and after the SERVICES. A similar provision shall be incorporated into all contractual arrangements entered into by OWNER and shall protect OWNER and GARVER to the same extent.

ARTICLE 10 - LIMITATIONS OF RESPONSIBILITY

GARVER shall not be responsible for: (1) construction means, methods, techniques, sequences, procedures or safety and security precautions and programs in connection with the PROJECT; (2) the failure of any contractor, subcontractor, vendor or other PROJECT participant, not under contract to GARVER, to fulfill contractual responsibilities to the OWNER or to comply with federal, state or local laws, regulations, and codes; or (3) procuring permits, certificates and licenses required for any construction unless such responsibilities are specifically assigned to GARVER in Attachment B, Scope of Services.

ARTICLE 11 - OPINIONS OF COST AND SCHEDULE

Since GARVER has no control over the cost of labor, materials or equipment furnished by others or over the resources provided by others to meet PROJECT schedules, GARVER's opinion of probable costs and of PROJECT schedules shall be made on the basis of experience and qualifications as a professional engineer utilizing good faith efforts to furnish reliable cost and schedule estimates. GARVER does not guarantee that proposals, bids, or actual PROJECT costs will not vary from GARVER's cost estimates.

ARTICLE 12 - REUSE OF DOCUMENTS

Upon OWNER's request GARVER shall furnish OWNER with deliverables and/or other data on electronic media. All documents, including but not limited to, drawings, specifications and computer software prepared by GARVER pursuant to this AGREEMENT are instruments of Service in respect to the PROJECT. Said documents are not intended or represented to be suitable for reuse by OWNER or others on extensions of the PROJECT or on any other PROJECT. Any modification or reuse of GARVER's deliverables and/or data on any project other the PROJECT without prior written verification or adaptation by GARVER for the specific purpose intended will be at OWNER's sole risk and without liability or legal exposure to GARVER.

ARTICLE 13 - TERMINATION

This AGREEMENT may be terminated by either party upon written notice in the event of substantial failure by the other party to perform in accordance with the terms of this AGREEMENT. The non-performing party shall have fifteen (15) calendar days from the date of the termination notice to cure or to submit a plan for cure acceptable to the other party.

OWNER may terminate or suspend performance of this AGREEMENT for OWNER's convenience upon written notice to GARVER. GARVER shall terminate or suspend performance of the SERVICES on a schedule acceptable to OWNER. If termination or suspension is for OWNER's convenience, OWNER shall pay GARVER for all the

SERVICES performed to date, amount not to exceed the normal fee amount due for the SERVICES rendered and termination or suspension expenses. Upon restart, an equitable adjustment shall be made to GARVER's compensation.

ARTICLE 14 - DELAY IN PERFORMANCE

Neither OWNER nor GARVER shall be considered in default of this AGREEMENT for delays in performance caused by circumstances beyond the reasonable control of the non-performing party. For purposes of this AGREEMENT, such circumstances include, but are not limited to abnormal weather conditions; floods; earthquakes; fire; epidemics; war; riot and other civil disturbances; strikes, work slowdowns and other labor disturbances; sabotage; judicial restraint; and inability to procure permits, licenses, or authorizations from any local, state, or federal agency for any of the supplies, materials, accesses, or SERVICES required to be provided by either OWNER or GARVER under this AGREEMENT. Notwithstanding anything to the contrary herein, if, through no fault of GARVER, schedule or dates are changed, or the orderly and continuous progress of GARVER's services is impaired, or GARVER's services are delayed or suspended, then NUA agrees to negotiate an acceptable equitable adjustment for the time for completion of GARVER's services and the rates and amounts of GARVER's compensation and to incorporate same into the Contract by an approved Contract Amendment.

Should such circumstances occur the non-performing party shall, within a reasonable period after being prevented from performing, give written notice to the other party describing the circumstances preventing continued performance and the efforts being made to resume performance of this AGREEMENT.

ARTICLE 15 - COMMUNICATIONS

Any communication required by this AGREEMENT shall be made in writing to the address specified below:

GARVER:

Mary Elizabeth Mach, P.E.

Garver LLC

1016 24th Avenue NW Norman, OK 73069 405-329-2555

MEMach@GarverUSA.com

OWNER:

Chris Mattingly, P.E.

Norman Utilities Authority (NUA)

201-C West Gray P.O. Box 370 Norman OK 73070 405-217-7778

Chris.mattingly@normanok.gov

Nothing contained in this Article shall be construed to restrict the transmission of routine communications between representatives of GARVER and OWNER.

ARTICLE 16 - WAIVER

A waiver by either OWNER or GARVER of any breach of this AGREEMENT shall be in writing. Such a waiver shall not affect the waiving party's rights with respect to any other or further breach.

ARTICLE 17 - SEVERABILITY

The invalidity, illegality, or unenforceability of any provision of this AGREEMENT or the occurrence of any event rendering any portion or provision of this AGREEMENT void shall in no way affect the validity or enforceability of any other portion or provision of this AGREEMENT. Any void provision shall be deemed severed from this AGREEMENT,

Item 8.

and the balance of this AGREEMENT shall be construed and enforced as if this AGREEMENT did not contain the particular portion or provision held to be void. The parties further agree to amend this AGREEMENT to replace any stricken provision with a valid Provision that comes as close as possible to the intent of the stricken provision. The provisions of this Article shall not prevent this entire AGREEMENT from being void should a provision, which is of the essence of this AGREEMENT, be determined void.

ARTICLE 18 - INTEGRATION

This AGREEMENT represents the entire and integrated AGREEMENT between OWNER and GARVER. It supersedes all prior and contemporaneous communications, representations, and agreements, whether oral or written, relating to the subject matter of this AGREEMENT. This AGREEMENT, including its attachments and schedules, may only be changed by a written amendment executed by both parties. The following attachments and schedules are hereby made a part of this AGREEMENT:

Attachment A - Schedule

Attachment B - Scope of Services

Attachment C - Compensation

ARTICLE 19 - SUCCESSORS AND ASSIGNS

OWNER and GARVER each binds itself and its directors, officers, partners, successors, executors, administrators, assigns, and legal representatives to the other party to this AGREEMENT and to the directors, officers, partners, successors, executors, administrators, assigns, and legal representatives of such other party in respect to all provisions of this AGREEMENT.

ARTICLE 20 - NO THIRD PARTY BENEFICARY

Nothing contained in this agreement shall create a contractual relationship with or a cause of action in favor of a third party against either the OWNER or GARVER.

IN WITNESS	WHERE	EOF, OW	NER and GARVER have o	executed this AGREEMENT.
DATED this	27th	_ day of _	January	20_23

Garver, LLC - GARVER

By: Mary Meek

Printed
Name: Mary E. MacH

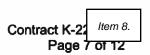
Title: SR. PRAYET MANAGER

ATTEST

Lake Thunderbird Basin Study

Garver Project 21W20020

Norman Uti	lities Authority- OWNER			
APPROVED	as to form and legality this	day of	, 20	
				City Attorney
APPROVED	by the Trustees of the Norman	Utilities Authority this_	day of	1
		ATTE	ST	
Ву:				
Printed Name:				
Title:	_			



ATTACHMENT A

PROJECT SCHEDULE

ENGINEER shall commence work under this AGREEMENT within ten (10) days of a Notice to Proceed (NTP) and shall complete the work in accordance with the schedule below.

Milestone / Task	Planned Completion (calendar days)				
Task 1 – Historic Data Review and Formatting	75 days from Owner NTP				
Task 2 - Model Development, Testing, and Validation	150 days from completion of Task 1				
Task 3 – Lake Level Forecasting Evaluation	45 days from completion of Task 2				
Task 4 – Model Reporting* 60 days from completion of Task 3					
*Note: Task 4 Model Reporting includes third-party panel reviews of the project deliverables, which will be					
dependent upon panel member schedules and other constraint	ts that may increase the duration of this task				

ATTACHMENT B

SCOPE OF SERVICES

GENERAL

Generally, the scope of services includes the development of a Predictive Lake Level Optimization Tool (PLOT) for the Lake Thunderbird (Lake) watershed in an Indirect Potable Reuse (IPR) context. The PLOT is intended to be a conceptual tool that can assist the Owner and the Central Oklahoma Master Conservancy District (COMCD) in planning a future lake augmentation system as it relates to the timing and duration of pumping for lake augmentation. Previous Engineering Reports and Master Plans have identified a three-phase design capacity build-out for a Lake Thunderbird IPR system: 5 million gallons per day (MGD), to 10 MGD, and finally to 15 MGD of pumping capacity. The PLOT could identify augmentation strategies that differ from the previously-planned flows, yet provide higher efficiency and return on investment as it relates to lake yield and sustainability.

The modeling efforts will be summarized in a Lake Thunderbird Basin Study report intended to meet the requirements outlined in the United States Bureau of Reclamation (USBR) WaterSMART grant program, a partial funding source of this project. The scope of services is comprised of four (4) tasks, which are summarized in the list below and described in further detail in subsequent sections:

- Task 1 Historic Data Review and Formatting
- Task 2 Model Development, Testing, and Validation
- Task 3 Lake Level Forecasting Evaluation
- Task 4 Model Reporting

Task 1 - Historic Data Review and Formatting

After Notice to Proceed, Garver will organize a project introduction call with the regional offices of the USBR (Oklahoma City and Austin) and the COMCD to discuss the project and the potential sources of data. At some point during Task 1, Garver will also attend a meeting with COMCD, NUA and USBR both to learn about COMCD's ongoing grant project regarding Lake Thunderbird historical yields and to give an overview to attendees about this project.

As part of Task 1, Garver and its subcontractor will compile a historical data set summarizing water criteria into and out of the Lake for up to the last five (5) years. Garver and its subconsultant will store, format, process, and cache the data in Garver's subconsultant cloud infrastructure. Data to be collected and compiled include data shown in Table 1.

Table 1: Historical data sets

Data	Expected duration/ granularity	Possible sources
Lake inflows (rivers, creeks, WWTPs, other in cubic feet per second (cfs), gallon per minute (gpm), or million gallons per day (MGD))	Last 5 years / daily	USACE, USGS, USBR, COMCD
Lake water level (Elevation in feet)	Last 5 years / daily	USACE, USGS, USBR, COMCD
Lake outflows (city water, industry, dam overflow, other in cfs, gpm, or MGD)	Last 5 years / daily	USACE, NUA, COMCD, USBR, City of Del City, City of Midwest City
Water Temperature (°F or °C)	Last 5 years / daily	USACE, USGS, USBR, COMCD, NUA
Precipitation (in.)	Last 5 years / daily	3 rd party services, USACE
Air Temperature (°F or °C)	Last 5 years / daily	3 rd party services, USACE
Lake evaporation rate (in. per year)	Last 5 years / daily	USACE, USGS, USBR, COMCD

Note that the possible sources of each parameter are anticipated to be publicly available or provided to Garver by Owner to obtain from local stakeholders and Federal agencies. The underlying mass balance computations built into the model, and their accuracy, are dependent upon the quality of data procured as part of Task 1.

Task 2 - Model Development, Testing, and Validation

Task 2 includes the development of the predictive model PLOT utilizing the information procured in Task 1. Initial efforts in Task 2 include development of near-term and long-term projections of inputs and outputs based on available data and statistics. A statistical analysis on the historical data will be performed to predict the relationships between mass-balance model inputs (e.g., inflows, usage, releases, evaporation, precipitation, etc.) with (1) the combination of previous historical information (e.g., water usage, temperature, precipitation, evaporation, etc.) and (2) forecasted variables (e.g., time of year, precipitation, temperature, sun/cloudiness, wind).

Statistical analysis will identify relationships between time of year and mass-balance model inputs for potential risk-reduction evaluations resulting from lake augmentation. These risk evaluations are anticipated to utilize both long-term historical data sets and potential climatological changes. The results of these statistical analyses will support Owner's efforts to build forecast model(s) to predict the lake's water level and inform augmentation decisions (evaluated further in Task 3).

PLOT will be tested and validated utilizing a test dataset that is withheld from the original data procured as part of Task 1. This test data set will serve as a test platform for refinement/validation of the model's predictive parameters using real inputs from historic data.

Task 3 - Lake Level Forecasting Evaluation

Utilizing PLOT as outlined in Task 2, Task 3 will use PLOT to complete simulations of synthetic data sets for long-term periods. The model evaluations will evaluate potential phasing alternatives for augmentation capacity. IPR treatment and pumping operating costs and lake yield increases will also be evaluated. Finally, risk mitigation associated with different operational strategies for the potential IPR facility will be considered. The evaluation will simulate the operation of the IPR facilities as if the WRF receives a 7-day forecast at the beginning of each week and uses that information for dictating the pumping scheme and water-balance of Lake Thunderbird. The model evaluation will include up to three (3) phasing alternatives as compared to the previously-planned 5 MGD, 10 MGD, and 15 MGD pumping capacities.

The simulated IPR operations data will be utilized to update life-cycle cost models for the IPR conveyance system (completed by Garver in the Engineering Report titled *Lake Thunderbird Augmentation* and dated August 2015, and other reports as necessary) that previously considered a continuous, daily flow for lake augmentation. The data evaluated in Task 3 will estimate the potential cost impacts of a *smart* IPR augmentation program that utilizes machine-learning with large historical and real-time data sets. Garver will prepare a comparison of the original lifecycle costs projected for the IPR conveyance system to IPR conveyance costs estimated from the Task 3 modeling evaluations.

The developed costs will include material procurement and construction of up to three (3) rated capacities of pumping facilities. For the purposes of this study, Garver and Owner will consider these as Rough Order Magnitude (ROM) estimates suitable for budget authorization or control. The expected range of accuracy for this type of estimate is -30 to +50% of the actual project estimate. Life-cycle costs shall include these estimated capital costs, as well as estimated costs associated with operations and maintenance (O&M) over a 20-year useful life. O&M costs will include, but not be limited to, labor, consumables (chemicals, water, electrical), maintenance and repair parts, and applicable recurring costs for modeling/cloud-based services.

Task 4 - Model Reporting

The findings of Task 1-3 will be summarized in a single Lake Thunderbird Basin Study Technical Memorandum (TM). This TM will follow BOR WaterSMART reporting guidelines and Garver will provide a draft TM for Owner review and comment. Two weeks of Owner review and comment time following delivery of the draft submittal is anticipated.

Following Owner review, Garver will conduct a review workshop at the Owner's location (which may include a mixture of virtual and onsite presence) to discuss the findings and Owner comments. Owner comments will be reviewed and documented in meeting minutes following the workshop, and a final TM incorporating suggested revisions will be delivered following the review workshop.

Upon delivering a final TM to the Owner, Garver will begin coordinating with the National Water Research Institute (NWRI) to develop and coordinate a meeting of a third-party review panel. The primary goal of the panel review will be to review PLOT and develop recommendations for pilot-testing of a cloud-hosted system to run the model autonomously for augmentation. It is anticipated that the panel review meeting will occur at the Owner's location with a mixture of virtual and in-person attendance.

The panel will receive the presentation from Garver and then publish its recommendations for data inputs to the PLOT model and expected performance metrics in a documented report to be published by the NWRI. The NWRI report will then be disseminated to its member water authorities and other water professionals. The NWRI report will also provide guidance on potential applications for the system, including traditional out-of-basin water transfers, conjunctive use of surface and groundwater supplies, IPR augmentation of surface water supplies, use of DPR to offset surface water withdrawals, among others. The future potential pilot program is anticipated to coincide with the construction project for the augmentation pump station at the Norman WRF and is not included in this scope of services.

Project Deliverables

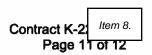
The following will be submitted to the Owner, or others as indicated, by Garver:

- Electronic copies of the historic data set
- Internet access to the cloud-based PLOT tool (for the duration of the contract period)
- Electronic copy of the historical data set, forecast results for each flow scenario, and visualizations of the PLOT tool outputs created for this project subject to the limitations described elsewhere in this Contract.
- Three (3) copies of the Draft TM to Owner
- Three (3) copies of the Final TM to Owner
- Three (3) copies of the Final TM to BOR
- Three (3) copies of the Final TM to NWRI
- Three (3) copies of the Draft NWRI Presentation to Owner
- Three (3) copies of the Final NWRI Presentation to Owner

Extra Work

The following items are not included under this agreement and will be considered as extra work:

- 1. Design services of any kind
- 2. Pump or infrastructure sizing outside of those described in this scope of services
- 3. Rework for the Owner's convenience or due to changed conditions after previous alternate direction and/or approval.
- 4. Pilot testing or water quality testing.
- 5. Field work data gathering.
- 6. Submittals or deliverables in addition to those listed herein.
- 7. Workshops in addition to those listed herein.
- 8. Preparation of a Storm Water Pollution Prevention Plan (SWPPP).
- 9. Bidding Phase Services of any kind.
- 10. Construction Phase Services of any kind.
- 11. Construction materials testing.
- 12. Environmental Handling and Documentation, including wetlands identification or mitigation plans or other work related to environmentally or historically (culturally) significant items.
- 13. Coordination with FEMA and preparation/submittal of a CLOMR and/or LOMR.
- 14. Arc Flash analysis or other power system studies.
- 15. Permitting efforts of any kind.
- 16. ODEQ permitting fees.
- Any coordination or cooperation with project team for unrelated COMCD Lake Thunderbird grant except as described herein.



Extra Work will be as directed by the Owner in writing for an additional fee as agreed upon by the Owner and Garver.

Item 8.

ATTACHMENT C

COMPENSATION

The OWNER will compensate ENGINEER on a lump sum basis for the following SERVICES rendered. The lump sum fee is broken down below by task as defined in the Scope of Services:

Task	Total Fee Amount	Less In-Kind Services
Task 1 – Historic Data Review and Formatting	\$7,800	
Task 2 – Model Development, Testing, and Validation	\$136,950	\$24,000
Task 3 – Lake Level Forecasting Evaluation	\$37,640	
Task 4 – Model Reporting	\$57,228	\$19,428
Subtotals	\$239,618	\$43,428
Contract Total	\$196,	190

The ENGINEER may submit interim statements, not to exceed one per month, for partial payment for SERVICES rendered. The statements to OWNER will be by task for the percentage of work actually completed. The OWNER shall make interim payments within 30 calendar days in response to ENGINEER's interim statements.

No budgetary allowance has been established for Additional Services. Additional services must be authorized by amendment of the AGREEMENT. Time and materials billing for ENGINEER'S labor will be at his standard hourly rates. ENGINEER's direct expenses, including subcontractor expenses, will include a multiplier of 1.10.

Through

NOTICE OF AWARD

Item 8.



AUTHORIZATION (Legislation/Regulations)

Public Law 111-11, Omnibus Public Land Management Act of 2009, Subtitle F, Secure Water, Section 9509.

8. TITLE OF PROJECT (OR PROGRAM)

From

7. BUDGET PERIOD

MM/DD/YYYY

04/06/2022

Lake Thunderbird Predictive Lake Level Optimization Tool (PLOT) 9a. GRANTEE NAME AND ADDRESS 9b. GRANTEE PROJECT DIRECTOR Mr. Kenneth Giannone CITY OF NORMAN 201 W Gray St 201 W Gray St Norman, OK, 73069-7108 Norman, OK, 73069-7108 Phone: 4053665377 10a. GRANTEE AUTHORIZING OFFICIAL 10b. FEDERAL PROJECT OFFICER Mr. Chris Mattingly Avra Morgan 201 W Gray Street Norman , OK, 73069-7108 Phone: 405-366-5494

MM/DD/YYYY

06/30/2023

44 400	DOVED DUDGET (5. 1. 1.	D: (A : ()	ALL AMOUNTS ARE					
	ROVED BUDGET (Excludes			+	COMPUTATION			148.339.00
I Finan	I Financial Assistance from the Federal Awarding Agency Only		a. Amount o	a. Amount of Federal Financial Assistance (norm term Finit)				
II Total project costs including grant funds and all other financial participation			b. Less Und	obligated Balance From Prior Budget	Periods \$		0.00	
a.	Salaries and Wages	\$	36.288.00	c. Less Cun	c. Less Cumulative Prior Award(s) This Budget Period \$			0.00
		_		d. AMOUN	FOF FINANCIAL ASSISTANCE THIS	S ACTION S		148,339.00
b.	Fringe Benefits	\$	9,623.00	13. Total Fed	deral Funds Awarded to Date for Pr	roject Period \$		148,339.00
c.	Total Personnel Costs	\$	45,911.00	14. RECOM	MENDED FUTURE SUPPORT			 -
d.	Equipment	\$	0.00	(Subject to the availability of funds and satisfactory progress of the project):				
e.	Supplies	\$	0.00	YEAR	TOTAL DIRECT COSTS	YEAR	TOTA	AL DIRECT COSTS
Ů.			0.00	a. 2	\$	d. 5	\$	<u> </u>
f.	Travel	\$	0.00	b. 3	\$	e. 6	\$	
g.	Construction	\$	0.00	c. 4	\$	f. 7	\$	
h.	Other	\$	43,428.00	15. PROGRAM	INCOME SHALL BE USED IN ACCORD WITH (S:	ONE OF THE FOLLOWI	NG	
i.	Contractual	\$	196,188.00	a. b.	DEDUCTION ADDITIONAL COSTS			e
j.	TOTAL DIRECT COST	rs —	\$ 285,527.00	c. d. e.	MATCHING OTHER RESEARCH (Add / Deduct Option) OTHER (See REMARKS)			
k.	INDIRECT COSTS		\$ 11,151.00		RD IS BASED ON AN APPLICATION SUBMITTE	D TO AND AS ADDRO	VED BY THE I	EDERAL AWARDING ACENCY
l.	TOTAL APPROVED BUD	GET	\$ 296,678.00	ON THE ABOVE	TITLED PROJECT AND IS SUBJECT TO THE TI- INCE IN THE FOLLOWING: The grant program legislation The grant program regulations.	ERMS AND CONDITION:	S INCORPORA	
m.	Federal Share	\$	148,339.00	This award notice including terms and conditions, if any, noted below under REMARKS. Federal administrative requirements, cost principles and audit requirements applicable to this grant.				
n.	Non-Federal Share	\$	148,339.00	In the event there are conflicting or otherwise inconsistent policies applicable to the grant, the above order of precedence si prevail. Acceptance of the grant terms and conditions is acknowledged by the grantee when funds are drawn or otherwise obtained from the grant payment system.				
				_				

REMARKS (Other Terms and Conditions Attached -

Yes

O No)

GRANTS MANAGEMENT OFFICIAL:

Edmund Weakland, Grants Management Specialist Bureau of Reclamation Main Interior Building 84-27132, PO Box 25007

Denver, CO, 80225-1000 Phone: 303-445-3757

See next page

Agreement Award Executed by Grants Officer:

BEVERLY NELSON Digitally signed by BEVERLY NELSON Date: 2022.04.06 12:59:30 -07'00'

17. VENDOR CODE 0071375225		18a. UEI DHCGNQR5LNB6 18b. DUNS 832238146		19. CONG. DIST.	04			
LINE#	FINANCIAL ACCT	AMT OF FIN ASST	START DATE	END DATE	TAS ACCT	PO LINE DESCRIPTION		
1	0051018734-00010	\$148,339.00	04/06/2022	06/30/2023	0680	R-DO-2021-000575 ASG Norman Utilities Au		ı
								66

Item 8.

NOTICE OF AWARD (Continuation Sheet)

PAGE 2 of 3	DATE ISSUED 04/06/2022	
GRANT NO.	R22AP00241-00	

REMARKS:

Program Income is not authorized.

Recipients are NOT required to sign the Notice of Award or any other award document or amendment. Recipients indicate their acceptance of an award or amendment to an existing award, including award terms and conditions, drawing down funds, or accepting the award or amendment via electronic means. Recipient acceptance of an award/amendment carries with it the responsibility to be aware of and comply with all terms and conditions applicable to the award. Recipients are responsible for ensuring that their subrecipients and contractors are aware of and comply with applicable award statutes, regulations, and terms and conditions. Recipient failure to comply with award terms and conditions can result in Reclamation taking one or more of the remedies and actions described in 2 CFR 200.339343.

NOTICE OF AWARD (Continuation Sheet)

PAGE 3 of 3		DATE ISSUED 04/06/2022	
GRANT NO.	R22A	.P00241-00	

Federal Financial Report Cycle					
Reporting Period Start Date	Reporting Period End Date	Reporting Type	Reporting Period Due Date		
04/06/2022	09/30/2022	Semi-Annual	10/30/2022		
10/01/2022	03/31/2023	Semi-Annual	04/30/2023		
04/01/2023	06/30/2023	Final	10/28/2023		

Performance Progress Report Cycle				
Reporting Period Start Date	Reporting Period End Date	Reporting Type	Reporting Period Due Date	
04/06/2022	09/30/2022	Semi-Annual	10/30/2022	
10/01/2022	03/31/2023	Semi-Annual	04/30/2023	
04/01/2023	06/30/2023	Final	10/28/2023	

Project Abstract Summary

1. The Norman Utilities Authority, located in Norman, Oklahoma, will collaborate with the National Water Research Institute to develop a Predictive Lake Level Optimization Tool (PLOT) for the Lake Thunderbird watershed in Central Oklahoma. This new water-balance tool help water managers implement the planned lake augmentation system by providing support for the timing and duration of pumping. Effective management of a reservoir's conservation pool is critical to the survival of any surface water body during prolonged drought periods. The new forecasting tool for lake water-level will play an important role during these periods. The project will seek to establish proof-of-concept for a model that, in subsequent work, can link to real-time data collection, make forecasts of the lake's water balance and the augmentation needed. The PLOT forecasts will consider both near-term precipitation projections and statistical climatological trends to identify the preferred augmentation flows to optimize lake yield, conjunctive groundwater use, drought risk mitigation, and augmentation volumes. The project will further the regional goal of a sustainable, shared water reservoir by constructing a cloud-based tool to allow for transparent, smart augmentation flow pumping to Lake Thunderbird.

Item 8.

AWARD ATTACHMENTS

CITY OF NORMAN R22AP00241-00

- 1. R22AP00241 Agreement
- 2. Project Abstract

UNITED STATES DEPARTMENT OF THE INTERIOR ASSISTANCE AGREEMENT

R22AP00241

Between
Bureau of Reclamation
Norman Utilities Authority
For
Lake Thunderbird Predictive Lake Level Optimization Tool (PLOT)

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Financial Assistance Agreement
Between
Bureau of Reclamation
And
Norman Utilities Authority
For

Lake Thunderbird Predictive Lake Level Optimization Tool (PLOT)

I. OVERVIEW AND SCHEDULE

1. AUTHORITY

This Financial Assistance Agreement (Agreement) is entered into between the United States of America, acting through the Department of the Interior, Bureau of Reclamation (Reclamation) and Norman Utilities Authority (Recipient), pursuant to the Omnibus Public Lands Management Act of 2009, Public Law 111-11, Section 9509 Research Agreement Authority (the "Act"). The following section, provided in full text, authorizes Reclamation to award this financial assistance agreement:

Section 9509 Research Agreement Authority.

The Secretary may enter into contracts, grants, or cooperative agreements, for periods not to exceed 5 years, to carry out research within the Bureau of Reclamation."

2. PUBLIC PURPOSE OF SUPPORT OR STIMULATION

The Lake Thunderbird Predictive Lake Level Optimization Tool (PLOT) project (Project) achieves the public purpose of the Act by increasing water supply reliability, providing flexibility in water operations, and improving water management.

3. BACKGROUND AND OBJECTIVES

Through WaterSMART (Sustain and Manage America's Resources for Tomorrow) Applied Science Grants, Reclamation provides cost shared financial assistance to States, Indian tribes, irrigation districts, water districts, or other organizations with water or power delivery authority, universities, nonprofit research institutions, and nonprofit organizations for projects to develop hydrologic information and water management tools and improve modeling and forecasting capabilities. Increased access to information and improved modeling and forecasting capabilities will help avoid water conflicts and improve our ability to meet a variety of water management objectives, including: support for water supply reliability, management of water deliveries, water marketing activities, drought management activities, conjunctive use of ground and surface

water, water rights administration, ability to meet endangered species requirements, watershed health, conservation and efficiency, and other water management objectives.

The Norman Utilities Authority, located in Norman, Oklahoma, will collaborate with the National Water Research Institute to develop a Predictive Lake Level Optimization Tool (PLOT) for the Lake Thunderbird watershed in Central Oklahoma. This new water-balance tool help water managers implement the planned lake augmentation system by providing support for the timing and duration of pumping. Effective management of a reservoir's conservation pool is critical to the survival of any surface water body during prolonged drought periods. The new forecasting tool for lake water-level will play an important role during these periods. The project will seek to establish proof-of-concept for a model that, in subsequent work, can link to real-time data collection, make forecasts of the lake's water balance and the augmentation needed. The PLOT forecasts will consider both near-term precipitation projections and statistical climatological trends to identify the preferred augmentation flows to optimize lake yield, conjunctive groundwater use, drought risk mitigation, and augmentation volumes. The project will further the regional goal of a sustainable, shared water reservoir by constructing a cloud-based tool to allow for transparent, smart augmentation flow pumping to Lake Thunderbird.

4. PERIOD OF PERFORMANCE AND FUNDS AVAILABILITY

This Agreement becomes effective on the date shown in block 1 of the United States of America, Department of the Interior, Notice of Award (NOA). The Agreement shall remain in effect through the date shown in block 6 of the NOA. The project period for this Agreement may only be changed through written amendment of the Agreement by a Reclamation Grants Officer (GO).

No legal liability on the part of the Government for any payment may arise until funds are made available, in writing, to the Recipient by a Reclamation GO. The total estimated project cost for this Agreement is \$296,678.00 and the total estimated amount of federal funding is \$148,339.00. The initial amount of federal funds available is limited to \$148,339.00 as indicated by "Amount of Financial Assistance This Action" within block 12 of the NOA. Subject to the availability of Congressional appropriations, subsequent funds will be made available for payment through written amendments to this Agreement by a Reclamation GO.

5. SCOPE OF WORK AND MILESTONES

Under this Agreement, the Recipient shall develop a Predictive Lake Optimization Tool (PLOT) for the Lake Thunderbird watershed in Central Oklahoma. Once completed, this pilot program will inform the final design of treatment and conveyance infrastructure for the City's planned indirect portable reuse (IPR) system at Lake Thunderbird.

5.1 Collect and compile historic data. The Recipient will compile a contiguous, historical data set describing water into and out of the lake, as well as temperature data, of a duration of at least 5 years.

- **5.2 Develop a cloud-based prototype.** The Recipient will develop a model for Lake Thunderbird water levels that is calibrated to the historical data set. The prototype will calculate the water level of Lake Thunderbird for specific forecasted time periods.
- **5.3 Test the lake-yield model.** The Recipient will test the calibrated, cloud-supported lake-yield model's ability to provide accurate forecasts of lake water-balance and actionable, risk-based information that may increase efficiency of pumping and treatment operations. A comparison of the original life-cycle cost projections and the modeling evaluation cost projections will be developed.
- **5.4 Webinar Presentation.** Reclamation may request the recipient to participate in a Reclamation-sponsored webinar to discuss application of deliverables to management questions. The presentation should inform Reclamation about project accomplishments, the final results of the identified tasks, and any lessons learned.

The milestones for completion of the Project are as follows:

Milestone / Task / Activity	Planned Start Date	Planned Completion Date
Collect and compile historic data	April 2022	May 2022
Format data and cloud storage	June 2022	July 2022
Develop a cloud-based model	July 2022	September 2022
Test and validation of the lake-yield model	October 2022	December 2022
Apply model to forecast augmentation	December 2022	January 2023
Cost model updates for forecasted operation	January 2023	February 2023
Project Completion Webinar	March 2023	April 2023

6. RESPONSIBILITY OF THE PARTIES

6.1 Recipient Responsibilities

- **6.1.1** The Recipient shall carry out the Scope of Work (SOW) in accordance with the terms and conditions stated herein. The Recipient shall adhere to Federal, state, and local laws, regulations, and codes, as applicable, and shall obtain all required approvals and permits. If the SOW contains construction activities, the Recipient is responsible for construction inspection, oversight, and acceptance. If applicable, the Recipient shall also coordinate and obtain approvals from site owners and operators.
- **6.1.2** Interim Performance Reports. The Recipient shall prepare and submit to Reclamation interim Project performance reports (Interim Performance Reports) as required by Section I.10 of

this Agreement. Each Interim Performance Report will include (but is not limited to) the information identified in paragraph I.10.3 and will discuss the following:

- A comparison of actual accomplishments to the milestones established by the financial assistance agreement for the reporting period
- The reasons why established milestones were not met, if applicable
- The status of milestones from the previous reporting period that were not met, if applicable
- Whether the Project is on schedule and within the original cost estimate
- Any additional pertinent information or issues related to the status of the Project
- **6.1.3 Final Project Report.** The Recipient shall prepare and submit to Reclamation a final Project performance report (Final Project Report) as required by Section I.10 of this Agreement. The Final Project Report will include (but is not limited to) the information identified in paragraph I.10.3 and will discuss the following:
 - Whether the Project objectives and goals were met
 - Discussion of the benefits achieved by the Project, including information and/or calculations supporting the benefits
 - How the Project improves long-term resiliency to drought
 - How the Project demonstrated collaboration, if applicable

Photographs documenting the project are also appreciated. Recipient understands that Reclamation may print photos with appropriate credit to Recipient. Recipient also understands that the Final Project Report is a public document and may be made available on Reclamation's website or by request.

6.1.4 Conferences. Recipient shall notify the Grants Officer Technical Representative of any submitted and/or accepted abstracts for conferences that will be attended to present on the results of work performed under this Agreement.

6.2 Reclamation Responsibilities

6.2.1 Reclamation will monitor and provide Federal oversight of activities performed under this Agreement. Monitoring and oversight includes review and approval of financial status and performance reports, payment requests, and any other deliverables identified as part of the SOW. Additional monitoring activities may include site visits, conference calls, and other on-site and off-site monitoring activities. At the Recipient's request, Reclamation may also provide technical assistance to the Recipient in support of the SOW and objectives of this Agreement.

7. BUDGET

7.1 Budget Estimate. The following is the estimated budget for this Agreement. As Federal financial assistance agreements are cost-reimbursable, the budget provided is for estimation

purposes only. Final costs incurred under the budget categories listed may be either higher or lower than the estimated costs. All costs incurred by the Recipient under this Agreement must be in accordance with any pre-award clarifications conducted between the Recipient and Reclamation, as well as with the terms and conditions of this Agreement. Final determination of the allowability, allocability, or reasonableness of costs incurred under this Agreement is the responsibility of the GO. Recipients are encouraged to direct any questions regarding allowability, allocability or reasonableness of costs to the GO for review prior to incurrence of the costs in question.

Summary					
6. Budget Object Category	Total Cost	Federal Estimated Amount	Non- Federal Estimated		
a. Personnel	\$36,288		Amount		
b. Fringe Benefits	\$9,623				
f. Contractual	\$196,188				
h. Other Direct Costs	\$43,428				
i. Total Direct Costs	\$285,527				
i. Indirect Charges	\$11,151				
Total Costs	\$296,678	\$148,339	\$148,339		
	Cost Share Percentage	50%	50%		

7.2 Cost Sharing Requirement

At least 50% non-Federal cost-share is required for costs incurred under this Agreement. If preaward costs are authorized, reimbursement of these costs is limited to federal cost share percentage identified in this Agreement.

The Federal share of allowable costs shall not be expended in advance of the Recipient's non-Federal share. It is expected that expenditure of Federal and non-Federal funds based upon the cost share percentage above shall occur concurrently. If a bona fide need arises which requires the expenditure of Federal funds in advance of the Recipient share, then the Recipient must request written approval from the GO prior to the expenditure. Recipient's may expend their agreed upon share of costs in advance of the expenditure of Federal funds without prior written approval.

7.3 Pre-Award Incurrence of Costs

The Recipient is not authorized to incur costs prior to the award of this Agreement. Costs incurred prior to the award of this Agreement are not allowable.

7.4 Allowable Costs

Costs incurred for the performance of this Agreement must be allowable, allocable to the project, and reasonable. The following regulations, codified within the Code of Federal Regulations (CFR), governs the allowability of costs for Federal financial assistance:

2 CFR 200 Subpart E, "Cost Principles"

Expenditures for the performance of this Agreement must conform to the requirements within this CFR. The Recipient must maintain sufficient documentation to support these expenditures. Questions on the allowability of costs should be directed to the GO responsible for this Agreement.

The Recipient shall not incur costs or obligate funds for any purpose pertaining to operation of the program or activities beyond the expiration date stated in the Agreement. The only costs which are authorized for a period of up to 120 days following the project period are those strictly associated with closeout activities for preparation of the final reports.

7.5 Revision of Budget and Program Plans

In accordance with 2 CFR 200.308(c)-(f) the recipient must request prior written approval for any of the following changes:

- (a) A change in the approved scope of work or associated tasks, even if there is no associated budget revisions.
- (b) Change in key personnel specified in section 8 "Key Personnel" of this Agreement.
- (c) Changes in the approved cost-sharing or matching outlined within this Agreement in section 7.2 "Cost Share requirements"
- (d) Inclusion of pre-award costs or reimbursement for pre-award costs which are not included in the initially approved budget and included in section 7.3 "Pre-Award Incurrence of Costs" of this Agreement.
- (e) Extensions to the project period identified in block 6 of the NOA.
- (f) The transfer of funds between direct cost categories, functions, and activities for which the expected transfer amount is to exceed 10 percent of the total approved budget.

7.6 Amendments

Any changes to this Agreement shall be made by means of a written amendment. Reclamation may make changes to the Agreement by means of a unilateral amendment to address changes in address, no-cost time extensions, changes to Key Personnel, the addition of previously agreed upon funding, or administrative corrections which do not impact the terms and conditions of this agreement. Additionally, a unilateral amendment may be utilized by Reclamation if it should become necessary to suspend or terminate the Agreement in accordance with 2 CFR 200.340.

All other changes shall be made by means of a bilateral amendment to the Agreement. No oral statement made by any person, or written statement by any person other than the GO, shall be allowed in any manner or degree to amend, modify or otherwise effect the terms of the Agreement.

All requests for amendment of the Agreement shall be made in writing, provide a full description of the reason for the request, and be sent to the attention of the GO. Any request for project period extension shall be made at least 45 days prior to the end of the project period of the Agreement or the project period date of any extension that may have been previously granted. Any determination to extend the project period or to provide follow-on funding for continuation of a project is solely at the discretion of Reclamation.

8. KEY PERSONNEL

8.1 Recipient's Key Personnel.

The Recipient's Project Manager for this Agreement shall be:

Mr. Kenneth Giannone, PE
Capital Projects Engineer, Norman Utilities Authority
201 W Gray Street
PO Box 370
Norman, OK
73069-7108
Kenneth.Giannone@NormanOK.gov
405-366-5377

Additional key personnel for this Agreement are as follows:

Mr. Chris Mattingly
Utilities Director, Norman Utilities Authority
201 W Gray Street
PO Box 370
Norman, OK
73069-7108
Kenneth.Giannone@NormanOK.gov
405-366-5377

9. LIMITATION OF AUTHORITIES

9.1 Grants Officer (GO).

The Reclamation GO is the only official with legal delegated authority to represent Reclamation. The Reclamation GO's responsibilities include, but are not limited to, the following:

(a) Formally obligate Reclamation to expend funds or change the funding level of the Agreement;

- (b) Approve through formal amendment changes in the scope of work and/or budget;
- (c) Approve through formal amendment any increase or decrease in the period of performance of the Agreement;
- (d) Approve through formal amendment changes in any of the expressed terms, conditions, or specifications of the Agreement;
- (e) Be responsible for the overall administration, management, and other non-programmatic aspects of the Agreement including, but not limited to, interpretation of financial assistance statutes, regulations, circulars, policies, and terms of the Agreement; Where applicable, ensures that Reclamation complies with the administrative requirements required by statutes, regulations, circulars, policies, and terms of the Agreement.

9.2 Grants Management Specialist (GMS).

The Reclamation Grants Management Specialist (GMS) is the primary administrative point of contact for this agreement and should be contacted regarding issues related to the day-to-day management of the agreement. Requests for approval regarding the terms and conditions of the agreement, including but not limited to amendments and prior approval, may only be granted, in writing, by a Reclamation GO. Please note that for some agreements, the Reclamation GO and the Reclamation GMS may be the same individual.

10. REPORTING REQUIREMENTS AND DISTRIBUTION

- **10.1 Noncompliance.** Failure to comply with the reporting requirements contained in this Agreement may be considered a material noncompliance with the terms and conditions of the award. Noncompliance may result in withholding of payments pending receipt of required reports, denying both the use of funds and matching credit for all or part of the cost of the activity or action not in compliance, whole or partial suspension or termination of the Agreement, recovery of funds paid under the Agreement, withholding of future awards, or other legal remedies in accordance with 2 CFR 200.340.
- **10.2 Financial Reports.** Federal Financial Reports shall be submitted by means of the SF-425 and shall be submitted according to the Report Frequency and Distribution schedule below. All financial reports shall be signed by an Authorized Certifying Official for the Recipient's organization.

10.3 Monitoring and Reporting Program Performance.

(a) Monitoring by the non-Federal entity. The non-Federal entity is responsible for oversight of the operations of the Federal award supported activities. The non-Federal entity must monitor its activities under Federal awards to assure compliance with applicable Federal requirements and performance expectations are being achieved. Monitoring by the non-

- Federal entity must cover each program, function or activity. See also 2 CFR 200.332 Requirements for pass-through entities.
- (b) Non-construction performance reports. The Federal awarding agency must use standard, OMB-approved data elements for collection of performance information (including performance progress reports, Research Performance Progress Report, or such future collections as may be approved by OMB and listed on the OMB Web site).
 - (1) The non-Federal entity must submit performance reports at the interval required by the Federal awarding agency or pass-through entity to best inform improvements in program outcomes and productivity. Intervals must be no less frequent than annually nor more frequent than quarterly except in unusual circumstances, for example where more frequent reporting is necessary for the effective monitoring of the Federal award or could significantly affect program outcomes. Annual reports must be due 90 calendar days after the reporting period; quarterly or semiannual reports must be due 30 calendar days after the reporting period. Alternatively, the Federal awarding agency or pass-through entity may require annual reports before the anniversary dates of multiple year Federal awards. The final performance report will be due 120 calendar days after the period of performance end date. If a justified request is submitted by a non-Federal entity, the Federal agency may extend the due date for any performance report.
 - (2) The non-Federal entity must submit performance reports using OMB-approved governmentwide standard information collections when providing performance information. As appropriate in accordance with above mentioned information collections, these reports will contain, for each Federal award, brief information on the following unless other collections are approved by OMB:
 - (i) A comparison of actual accomplishments to the objectives of the Federal award established for the period. Where the accomplishments of the Federal award can be quantified, a computation of the cost (for example, related to units of accomplishment) may be required if that information will be useful. Where performance trend data and analysis would be informative to the Federal awarding agency program, the Federal awarding agency should include this as a performance reporting requirement.
 - (ii) The reasons why established goals were not met, if appropriate.
 - (iii) Additional pertinent information including, when appropriate, analysis and explanation of cost overruns or high unit costs.
- (c) Construction performance reports. For the most part, onsite technical inspections and certified percentage of completion data are relied on heavily by Federal awarding agencies and pass-through entities to monitor progress under Federal awards and subawards for construction. The Federal awarding agency may require additional performance reports only when considered necessary.

- (d) Significant developments. Events may occur between the scheduled performance reporting dates that have significant impact upon the supported activity. In such cases, the non-Federal entity must inform the Federal awarding agency or pass-through entity as soon as the following types of conditions become known:
 - (1) Problems, delays, or adverse conditions which will materially impair the ability to meet the objective of the Federal award. This disclosure must include a statement of the action taken, or contemplated, and any assistance needed to resolve the situation.
 - (2) Favorable developments which enable meeting time schedules and objectives sooner or at less cost than anticipated or producing more or different beneficial results than originally planned.

Reclamation requires Performance reporting for all financial assistance awards, both Construction and non-Construction. Performance reports for Construction agreements shall meet the same minimum requirements outlined in paragraph (b)(2) above.

10.4 Report Frequency and Distribution. The following table sets forth the reporting requirements for this Agreement. Please note the first report due date listed for each type of report.

Required Reports	Interim Reports	Final Report		
Performance Re	Performance Report			
Format	No specific format required. See content requirements within Section 10.3 and any program specific reporting requirements identified in Section 6.1 of this Agreement.	Summary of activities completed during the entire period of performance is required. See content requirements within Section 10.3 and any program specific reporting requirements identified in Section 6.1 of this Agreement.		
Reporting	Semi-Annual	Final Report due within 120 days after		
Frequency		the end of the period of performance.		
Reporting	October 1 through March 31 and April	Entire period of performance		
Period	1 through September 30.			
Due Date	Within 30 days after the end of the Reporting Period.	Final Report due within 120 days after the end of the period of performance or completion of the project.		
First Report Due Date	The first performance report is due for reporting period ending 09/30/2022.	N/A		
Submit to:	Reports can be submitted using GrantSolutions.gov or via email at: sha-dro-faoperations@usbr.gov Attn: GMS	Reports can be submitted using GrantSolutions.gov or via email at: sha-dro-faoperations@usbr.gov Attn: GMS		
Federal Financial Report				
Format	SF-425 (all sections must be completed)	SF-425(all sections must be completed)		

Required Reports	Interim Reports	Final Report
Reporting	Semi-Annual	Final Report due within 120 days after
Frequency		the end of the period of performance.
Reporting	October 1 through March 31 and April	Entire period of performance
Period	1 through September 30.	
Due Date	Within 30 days after the end of the	Final Report due within 120 days after
	Reporting Period.	the end of the period of performance or completion of the project.
First Report	The first performance report is due for	N/A
Due Date	reporting period ending 09/30/2022.	
Submit to:	Reports can be submitted using	Reports can be submitted using
	GrantSolutions.gov or via email at:	GrantSolutions.gov or via email at:
	sha-dro-faoperations@usbr.gov	sha-dro-faoperations@usbr.gov
	Attn: GMS	Attn: GMS

11. REGULATORY COMPLIANCE

The Recipient agrees to comply or assist Reclamation with all regulatory compliance requirements and all applicable state, Federal, and local environmental and cultural and paleontological resource protection laws and regulations as applicable to this project. These may include, but are not limited to, the National Environmental Policy Act (NEPA), including the Council on Environmental Quality and Department of the Interior regulations implementing NEPA, the Clean Water Act, the Endangered Species Act, consultation with potentially affected Tribes, and consultation with the State Historic Preservation Office. If the Recipient begins project activities that require environmental or other regulatory compliance approval prior to receipt of written notice from a Reclamation GO that all such clearances have been obtained, then Reclamation reserves the right to initiate remedies for non-compliance as defined by 2 CFR 200.340 up to and including unilateral termination of this agreement.

12. AGRICULTURAL OPERATIONS [Public Law 111-11, Section 9504(a)(3)(B)]

The Recipient shall not use any associated water savings to increase the total irrigated acreage of the Recipient or otherwise increase the consumptive use of water in the operation of the Recipient, as determined pursuant to the law of the State in which the operation of Recipient is located.

13. TITLE TO IMPROVEMENTS [Public Law 111-11, Section 9504(a)(3)(D)]

If the activities funded under this Agreement result in an infrastructure improvement to a federally owned facility, the Federal Government shall continue to hold title to the facility and improvements to the facility.

14. OPERATION AND MAINTENANCE COSTS [Public Law 111-11, Section 9504(a)(3)(E)(iv.)]

The non-Federal share of the cost of operating and maintaining any infrastructure improvement funded through this Agreement shall be 100 percent.

15. LIABILITY [Public Law 111-11, Section 9504(a)(3)(F)]

- (a) **IN GENERAL**.—Except as provided under chapter 171 of title 28, United States Code (commonly known as the "Federal Tort Claims Act"), the United States shall not be liable for monetary damages of any kind for any injury arising out of an act, omission, or occurrence that arises in relation to any facility created or improved under this Agreement, the title of which is not held by the United States.
- (b) **TORT CLAIMS ACT.**—Nothing in this section increases the liability of the United States beyond that provided in chapter 171 of title 28, United States Code (commonly known as the "Federal Tort Claims Act").

II. RECLAMATION STANDARD TERMS AND CONDITIONS

1. REGULATIONS

The regulations at <u>2 CFR Subtitle A, Chapter II, Part 200</u> "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards", are hereby incorporated by reference as though set forth in full text. Failure of a Recipient to comply with any applicable regulation or circular may be the basis for withholding payments for proper charges made by the Recipient and/or for termination of support.

2. PAYMENT

2.1 Payment (2 CFR 200.305).

- (a) For states, payments are governed by Treasury-State Cash Management Improvement Act (CMIA) agreements and default procedures codified at 31 CFR part 205 and Treasury Financial Manual (TFM) 4A-2000, "Overall Disbursing Rules for All Federal Agencies".
- (b) For non-Federal entities other than states, payments methods must minimize the time elapsing between the transfer of funds from the United States Treasury or the pass-through entity and the disbursement by the non-Federal entity whether the payment is made by electronic funds transfer, or issuance or redemption of checks, warrants, or payment by other means. See also §200.302(b)(6). Except as noted elsewhere in this part, Federal agencies must require recipients to use only OMB-approved, governmentwide information collection requests to request payment.
 - (1) The non-Federal entity must be paid in advance, provided it maintains or demonstrates the willingness to maintain both written procedures that minimize the time elapsing between the transfer of funds and disbursement by the non-Federal entity, and financial management systems that meet the standards for fund control and accountability as established in this part. Advance payments to a non-Federal entity must be limited to the minimum amounts needed and be timed to be in accordance with the actual, immediate cash requirements of the non-Federal entity in carrying out the purpose of the approved program or project. The timing and amount of advance payments must be as close as is administratively feasible to the actual disbursements by the non-Federal entity for direct program or project costs and the proportionate share of any allowable indirect costs. The non-Federal entity must make timely payment to contractors in accordance with the contract provisions.
 - (2) Whenever possible, advance payments must be consolidated to cover anticipated cash needs for all Federal awards made by the Federal awarding agency to the recipient.
 - (i) Advance payment mechanisms include, but are not limited to, Treasury check and electronic funds transfer and must comply with applicable guidance in 31 CFR part 208.
 - (ii) Non-Federal entities must be authorized to submit requests for advance payments and reimbursements at least monthly when electronic fund transfers are not used,

- and as often as they like when electronic transfers are used, in accordance with the provisions of the Electronic Fund Transfer Act (15 U.S.C. 1693-1693r).
- (3) Reimbursement is the preferred method when the requirements in this paragraph (b) cannot be met, when the Federal awarding agency sets a specific condition per §200.208, or when the non-Federal entity requests payment by reimbursement. This method may be used on any Federal award for construction, or if the major portion of the construction project is accomplished through private market financing or Federal loans, and the Federal award constitutes a minor portion of the project. When the reimbursement method is used, the Federal awarding agency or pass-through entity must make payment within 30 calendar days after receipt of the billing, unless the Federal awarding agency or pass-through entity reasonably believes the request to be improper.
- (4) If the non-Federal entity cannot meet the criteria for advance payments and the Federal awarding agency or pass-through entity has determined that reimbursement is not feasible because the non-Federal entity lacks sufficient working capital, the Federal awarding agency or pass-through entity may provide cash on a working capital advance basis. Under this procedure, the Federal awarding agency or pass-through entity must advance cash payments to the non-Federal entity to cover its estimated disbursement needs for an initial period generally geared to the non-Federal entity's disbursing cycle. Thereafter, the Federal awarding agency or pass-through entity must reimburse the non-Federal entity for its actual cash disbursements. Use of the working capital advance method of payment requires that the pass-through entity provide timely advance payments to any subrecipients in order to meet the subrecipient's actual cash disbursements. The working capital advance method of payment must not be used by the pass-through entity if the reason for using this method is the unwillingness or inability of the pass-through entity to provide timely advance payments to the subrecipient to meet the subrecipient's actual cash disbursements.
- (5) To the extent available, the non-Federal entity must disburse funds available from program income (including repayments to a revolving fund), rebates, refunds, contract settlements, audit recoveries, and interest earned on such funds before requesting additional cash payments.
- (6) Unless otherwise required by Federal statutes, payments for allowable costs by non-Federal entities must not be withheld at any time during the period of performance unless the conditions of §200.208, subpart D of this part, including §200.339, or one or more of the following applies:
 - (i) The non-Federal entity has failed to comply with the project objectives, Federal statutes, regulations, or the terms and conditions of the Federal award.
 - (ii) The non-Federal entity is delinquent in a debt to the United States as defined in OMB Circular A-129, "Policies for Federal Credit Programs and Non-Tax Receivables." Under such conditions, the Federal awarding agency or pass-through entity may, upon reasonable notice, inform the non-Federal entity that payments must not be made for financial obligations incurred after a specified date until the

- conditions are corrected or the indebtedness to the Federal Government is liquidated.
- (iii) A payment withheld for failure to comply with Federal award conditions, but without suspension of the Federal award, must be released to the non-Federal entity upon subsequent compliance. When a Federal award is suspended, payment adjustments will be made in accordance with §200.343.
- (iv) A payment must not be made to a non-Federal entity for amounts that are withheld by the non-Federal entity from payment to contractors to assure satisfactory completion of work. A payment must be made when the non-Federal entity actually disburses the withheld funds to the contractors or to escrow accounts established to assure satisfactory completion of work.
- (7) Standards governing the use of banks and other institutions as depositories of advance payments under Federal awards are as follows.
 - (i) The Federal awarding agency and pass-through entity must not require separate depository accounts for funds provided to a non-Federal entity or establish any eligibility requirements for depositories for funds provided to the non-Federal entity. However, the non-Federal entity must be able to account for funds received, obligated, and expended.
 - (ii) Advance payments of Federal funds must be deposited and maintained in insured accounts whenever possible.
- (8) The non-Federal entity must maintain advance payments of Federal awards in interestbearing accounts, unless the following apply:
 - (i) The non-Federal entity receives less than \$250,000 in Federal awards per year.
 - (ii) The best reasonably available interest-bearing account would not be expected to earn interest in excess of \$500 per year on Federal cash balances.
 - (iii) The depository would require an average or minimum balance so high that it would not be feasible within the expected Federal and non-Federal cash resources.
 - (iv) A foreign government or banking system prohibits or precludes interest-bearing accounts.
- (9) Interest earned amounts up to \$500 per year may be retained by the non-Federal entity for administrative expense. Any additional interest earned on Federal advance payments deposited in interest-bearing accounts must be remitted annually to the Department of Health and Human Services Payment Management System (PMS) through an electronic medium using either Automated Clearing House (ACH) network or a Fedwire Funds Service payment.
 - (i) For returning interest on Federal awards paid through PMS, the refund should:
 - (A) Provide an explanation stating that the refund is for interest;
 - (B) List the PMS Payee Account Number(s) (PANs);

- (C) List the Federal award number(s) for which the interest was earned; and
- (D) Make returns payable to: Department of Health and Human Services.
- (ii) For returning interest on Federal awards not paid through PMS, the refund should:
 - (A) Provide an explanation stating that the refund is for interest;
 - (B) Include the name of the awarding agency;
 - (C) List the Federal award number(s) for which the interest was earned; and
 - (D) Make returns payable to: Department of Health and Human Services.
- (10) Funds, principal, and excess cash returns must be directed to the original Federal agency payment system. The non-Federal entity should review instructions from the original Federal agency payment system. Returns should include the following information:
 - (i) Payee Account Number (PAN), if the payment originated from PMS, or Agency information to indicate whom to credit the funding if the payment originated from ASAP, NSF, or another Federal agency payment system.
 - (ii) PMS document number and subaccount(s), if the payment originated from PMS, or relevant account numbers if the payment originated from another Federal agency payment system.
 - (iii) The reason for the return (e.g., excess cash, funds not spent, interest, part interest part other, etc.)
- (11) When returning funds or interest to PMS you must include the following as applicable:
 - (i) For ACH Returns:

Routing Number: 051036706 Account number: 303000

Bank Name and Location: Credit Gateway—ACH Receiver St. Paul, MN

(ii) For Fedwire Returns¹:

Routing Number: 021030004 Account number: 75010501

Bank Name and Location: Federal Reserve Bank Treas NYC/Funds Transfer

Division New York, NY

¹Please note that the organization initiating payment is likely to incur a charge from their Financial Institution for this type of payment.

(iii) For International ACH Returns:

Beneficiary Account: Federal Reserve Bank of New York/ITS (FRBNY/ITS)

Bank: Citibank N.A. (New York)

Swift Code: CITIUS33 Account Number: 36838868

Bank Address: 388 Greenwich Street, New York, NY 10013 USA Payment Details (Line 70): Agency Locator Code (ALC): 75010501

Name (abbreviated when possible) and ALC Agency POC

- (iv) For recipients that do not have electronic remittance capability, please make check² payable to: "The Department of Health and Human Services."
 Mail Check to Treasury approved lockbox:
 HHS Program Support Center, P.O. Box 530231, Atlanta, GA 30353-0231

 ²Please allow 4-6 weeks for processing of a payment by check to be applied to the appropriate PMS account.
- (v) Questions can be directed to PMS at 877-614-5533 or PMSSupport@psc.hhs.gov.

2.2 Payment Method.

Recipients must utilize the Department of Treasury Automated Standard Application for Payments (ASAP) payment system to request advance or reimbursement payments. ASAP is a Recipient-initiated payment and information system designed to provide a single point of contact for the request and delivery of Federal funds. ASAP is the only allowable method for request and receipt of payment. Recipient procedures must minimize the time elapsing between the drawdown of Federal funds and the disbursement for agreement purposes.

In accordance with 2 CFR 25.200(b)(2) the Recipient shall "Maintain an active SAM registration with current information, including information on a recipient's immediate and highest level owner and subsidiaries, as well as on all predecessors that have been awarded a Federal contract or grant within the last three years, if applicable, at all times during which it has an active Federal award or an application or plan under consideration by a Federal awarding agency. If the Recipient allows their SAM registration to lapse, the Recipient's accounts within ASAP will be automatically suspended by Reclamation until such time as the Recipient renews their SAM registration.

3. PROCUREMENT STANDARDS (2 CFR 200.317 through 200.327)

§200.317 Procurements by States.

When procuring property and services under a Federal award, a State must follow the same policies and procedures it uses for procurements from its non-Federal funds. The State will comply with §§200.321, 200.322, and 200.323 and ensure that every purchase order or other contract includes any clauses required by §200.327. All other non-Federal entities, including subrecipients of a State, must follow the procurement standards in §§200.318 through 200.327.

§200.318 General procurement standards.

- (a) The non-Federal entity must use its own documented procurement procedures which reflect applicable State, local, and tribal laws and regulations, provided that the procurements conform to applicable Federal law and the standards identified in this part.
- (b) Non-Federal entities must maintain oversight to ensure that contractors perform in accordance with the terms, conditions, and specifications of their contracts or purchase orders.

(c)

- (1) The non-Federal entity must maintain written standards of conduct covering conflicts of interest and governing the actions of its employees engaged in the selection, award and administration of contracts. No employee, officer, or agent may participate in the selection, award, or administration of a contract supported by a Federal award if he or she has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. The officers, employees, and agents of the non-Federal entity may neither solicit nor accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts. However, non-Federal entities may set standards for situations in which the financial interest is not substantial or the gift is an unsolicited item of nominal value. The standards of conduct must provide for disciplinary actions to be applied for violations of such standards by officers, employees, or agents of the non-Federal entity.
- (2) If the non-Federal entity has a parent, affiliate, or subsidiary organization that is not a state, local government, or Indian tribe, the non-Federal entity must also maintain written standards of conduct covering organizational conflicts of interest. Organizational conflicts of interest means that because of relationships with a parent company, affiliate, or subsidiary organization, the non-Federal entity is unable or appears to be unable to be impartial in conducting a procurement action involving a related organization.
- (d) The non-Federal entity's procedures must avoid acquisition of unnecessary or duplicative items. Consideration should be given to consolidating or breaking out procurements to obtain a more economical purchase. Where appropriate, an analysis will be made of lease versus purchase alternatives, and any other appropriate analysis to determine the most economical approach.
- (e) To foster greater economy and efficiency, and in accordance with efforts to promote costeffective use of shared services across the Federal Government, the non-Federal entity is encouraged to enter into state and local intergovernmental agreements or inter-entity agreements where appropriate for procurement or use of common or shared goods and services.
- (f) The non-Federal entity is encouraged to use Federal excess and surplus property in lieu of purchasing new equipment and property whenever such use is feasible and reduces project costs.
- (g) The non-Federal entity is encouraged to use value engineering clauses in contracts for construction projects of sufficient size to offer reasonable opportunities for cost reductions. Value engineering is a systematic and creative analysis of each contract item or task to ensure that its essential function is provided at the overall lower cost.

- (h) The non-Federal entity must award contracts only to responsible contractors possessing the ability to perform successfully under the terms and conditions of a proposed procurement. Consideration will be given to such matters as contractor integrity, compliance with public policy, record of past performance, and financial and technical resources. See also 200.212 Suspension and debarment.
- (i) The non-Federal entity must maintain records sufficient to detail the history of procurement. These records will include, but are not necessarily limited to the following: rationale for the method of procurement, selection of contract type, contractor selection or rejection, and the basis for the contract price.
- (j) (1) The non-Federal entity may use a time and materials type contract only after a determination that no other contract is suitable and if the contract includes a ceiling price that the contractor exceeds at its own risk. Time and materials type contract means a contract whose cost to a non-Federal entity is the sum of:
 - (i) The actual cost of materials; and
 - (ii) Direct labor hours charged at fixed hourly rates that reflect wages, general and administrative expenses, and profit.
 - (2) Since this formula generates an open-ended contract price, a time-and-materials contract provides no positive profit incentive to the contractor for cost control or labor efficiency. Therefore, each contract must set a ceiling price that the contractor exceeds at its own risk. Further, the non-Federal entity awarding such a contract must assert a high degree of oversight in order to obtain reasonable assurance that the contractor is using efficient methods and effective cost controls.
- (k) The non-Federal entity alone must be responsible, in accordance with good administrative practice and sound business judgment, for the settlement of all contractual and administrative issues arising out of procurements. These issues include, but are not limited to, source evaluation, protests, disputes, and claims. These standards do not relieve the non-Federal entity of any contractual responsibilities under its contracts. The Federal awarding agency will not substitute its judgment for that of the non-Federal entity unless the matter is primarily a Federal concern. Violations of law will be referred to the local, state, or Federal authority having proper jurisdiction.

§200.319 Competition.

- (a) All procurement transactions for the acquisition of property or services required under a Federal award must be conducted in a manner providing full and open competition consistent with the standards of this section and §200.320.
- (b) In order to ensure objective contractor performance and eliminate unfair competitive advantage, contractors that develop or draft specifications, requirements, statements of work, or invitations for bids or requests for proposals must be excluded from competing

for such procurements. Some of the situations considered to be restrictive of competition include but are not limited to:

- (1) Placing unreasonable requirements on firms in order for them to qualify to do business;
- (2) Requiring unnecessary experience and excessive bonding;
- (3) Noncompetitive pricing practices between firms or between affiliated companies;
- (4) Noncompetitive contracts to consultants that are on retainer contracts;
- (5) Organizational conflicts of interest;
- (6) Specifying only a "brand name" product instead of allowing "an equal" product to be offered and describing the performance or other relevant requirements of the procurement; and
- (7) Any arbitrary action in the procurement process.
- (c) The non-Federal entity must conduct procurements in a manner that prohibits the use of statutorily or administratively imposed state, local, or tribal geographical preferences in the evaluation of bids or proposals, except in those cases where applicable Federal statutes expressly mandate or encourage geographic preference. Nothing in this section preempts state licensing laws. When contracting for architectural and engineering (A/E) services, geographic location may be a selection criterion provided its application leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract.
- (d) The non-Federal entity must have written procedures for procurement transactions. These procedures must ensure that all solicitations:
 - (1) Incorporate a clear and accurate description of the technical requirements for the material, product, or service to be procured. Such description must not, in competitive procurements, contain features which unduly restrict competition. The description may include a statement of the qualitative nature of the material, product or service to be procured and, when necessary, must set forth those minimum essential characteristics and standards to which it must conform if it is to satisfy its intended use. Detailed product specifications should be avoided if at all possible. When it is impractical or uneconomical to make a clear and accurate description of the technical requirements, a "brand name or equivalent" description may be used as a means to define the performance or other salient requirements of procurement. The specific features of the named brand which must be met by offers must be clearly stated; and
 - (2) Identify all requirements which the offerors must fulfill and all other factors to be used in evaluating bids or proposals.
- (e) The non-Federal entity must ensure that all prequalified lists of persons, firms, or products which are used in acquiring goods and services are current and include enough qualified sources to ensure maximum open and free competition. Also, the non-Federal entity must not preclude potential bidders from qualifying during the solicitation period.

(f) Noncompetitive procurements can only be awarded in accordance with §200.320(c).

§200.320 Methods of procurement to be followed.

The non-Federal entity must have and use documented procurement procedures, consistent with the standards of this section and §§200.317, 200.318, and 200.319 for any of the following methods of procurement used for the acquisition of property or services required under a Federal award or sub-award.

- (a) Informal procurement methods. When the value of the procurement for property or services under a Federal award does not exceed the simplified acquisition threshold (SAT), as defined in §200.1, or a lower threshold established by a non-Federal entity, formal procurement methods are not required. The non-Federal entity may use informal procurement methods to expedite the completion of its transactions and minimize the associated administrative burden and cost. The informal methods used for procurement of property or services at or below the SAT include:
 - (1) Micro-purchases—(i) Distribution. The acquisition of supplies or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold (See the definition of micro-purchase in §200.1). To the maximum extent practicable, the non-Federal entity should distribute micro-purchases equitably among qualified suppliers.
 - (ii) Micro-purchase awards. Micro-purchases may be awarded without soliciting competitive price or rate quotations if the non-Federal entity considers the price to be reasonable based on research, experience, purchase history or other information and documents it files accordingly. Purchase cards can be used for micro-purchases if procedures are documented and approved by the non-Federal entity.
 - (iii) Micro-purchase thresholds. The non-Federal entity is responsible for determining and documenting an appropriate micro-purchase threshold based on internal controls, an evaluation of risk, and its documented procurement procedures. The micro-purchase threshold used by the non-Federal entity must be authorized or not prohibited under State, local, or tribal laws or regulations. Non-Federal entities may establish a threshold higher than the Federal threshold established in the Federal Acquisition Regulations (FAR) in accordance with paragraphs (a)(1)(iv) and (v) of this section.
 - (iv) Non-Federal entity increase to the micro-purchase threshold up to \$50,000. Non-Federal entities may establish a threshold higher than the micro-purchase threshold identified in the FAR in accordance with the requirements of this section. The non-Federal entity may self-certify a threshold up to \$50,000 on an annual basis and must maintain documentation to be made available to the Federal awarding agency and auditors in accordance with §200.334. The self-

certification must include a justification, clear identification of the threshold, and supporting documentation of any of the following:

- (A) A qualification as a low-risk auditee, in accordance with the criteria in §200.520 for the most recent audit;
- (B) An annual internal institutional risk assessment to identify, mitigate, and manage financial risks; or,
- (C) For public institutions, a higher threshold consistent with State law.
- (v) Non-Federal entity increase to the micro-purchase threshold over \$50,000. Micro-purchase thresholds higher than \$50,000 must be approved by the cognizant agency for indirect costs. The non-federal entity must submit a request with the requirements included in paragraph (a)(1)(iv) of this section. The increased threshold is valid until there is a change in status in which the justification was approved.
- (2) Small purchases—(i) Small purchase procedures. The acquisition of property or services, the aggregate dollar amount of which is higher than the micro-purchase threshold but does not exceed the simplified acquisition threshold. If small purchase procedures are used, price or rate quotations must be obtained from an adequate number of qualified sources as determined appropriate by the non-Federal entity.
 - (ii) Simplified acquisition thresholds. The non-Federal entity is responsible for determining an appropriate simplified acquisition threshold based on internal controls, an evaluation of risk and its documented procurement procedures which must not exceed the threshold established in the FAR. When applicable, a lower simplified acquisition threshold used by the non-Federal entity must be authorized or not prohibited under State, local, or tribal laws or regulations.
- (b) Formal procurement methods. When the value of the procurement for property or services under a Federal financial assistance award exceeds the SAT, or a lower threshold established by a non-Federal entity, formal procurement methods are required. Formal procurement methods require following documented procedures. Formal procurement methods also require public advertising unless a non-competitive procurement can be used in accordance with §200.319 or paragraph (c) of this section. The following formal methods of procurement are used for procurement of property or services above the simplified acquisition threshold or a value below the simplified acquisition threshold the non-Federal entity determines to be appropriate:
 - (1) Sealed bids. A procurement method in which bids are publicly solicited and a firm fixed-price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all the material terms and conditions of the invitation for

bids, is the lowest in price. The sealed bids method is the preferred method for procuring construction, if the conditions.

- (i) In order for sealed bidding to be feasible, the following conditions should be present:
 - (A) A complete, adequate, and realistic specification or purchase description is available;
 - (B) Two or more responsible bidders are willing and able to compete effectively for the business; and
 - (C) The procurement lends itself to a firm fixed price contract and the selection of the successful bidder can be made principally on the basis of price.
- (ii) If sealed bids are used, the following requirements apply:
 - (A) Bids must be solicited from an adequate number of qualified sources, providing them sufficient response time prior to the date set for opening the bids, for local, and tribal governments, the invitation for bids must be publicly advertised;
 - (B) The invitation for bids, which will include any specifications and pertinent attachments, must define the items or services in order for the bidder to properly respond;
 - (C) All bids will be opened at the time and place prescribed in the invitation for bids, and for local and tribal governments, the bids must be opened publicly;
 - (D) A firm fixed price contract award will be made in writing to the lowest responsive and responsible bidder. Where specified in bidding documents, factors such as discounts, transportation cost, and life cycle costs must be considered in determining which bid is lowest. Payment discounts will only be used to determine the low bid when prior experience indicates that such discounts are usually taken advantage of; and
 - (E) Any or all bids may be rejected if there is a sound documented reason.
- (2) Proposals. A procurement method in which either a fixed price or cost-reimbursement type contract is awarded. Proposals are generally used when conditions are not appropriate for the use of sealed bids. They are awarded in accordance with the following requirements:
 - (i) Requests for proposals must be publicized and identify all evaluation factors and their relative importance. Proposals must be solicited from an adequate number of qualified offerors. Any response to publicized requests for proposals must be considered to the maximum extent practical;
 - (ii) The non-Federal entity must have a written method for conducting technical evaluations of the proposals received and making selections;

- (iii) Contracts must be awarded to the responsible offeror whose proposal is most advantageous to the non-Federal entity, with price and other factors considered; and
- (iv) The non-Federal entity may use competitive proposal procedures for qualifications-based procurement of architectural/engineering (A/E) professional services whereby offeror's qualifications are evaluated and the most qualified offeror is selected, subject to negotiation of fair and reasonable compensation. The method, where price is not used as a selection factor, can only be used in procurement of A/E professional services. It cannot be used to purchase other types of services though A/E firms that are a potential source to perform the proposed effort.
- (c) Noncompetitive procurement. There are specific circumstances in which noncompetitive procurement can be used. Noncompetitive procurement can only be awarded if one or more of the following circumstances apply:
 - (1) The acquisition of property or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold (see paragraph (a)(1) of this section);
 - (2) The item is available only from a single source;
 - (3) The public exigency or emergency for the requirement will not permit a delay resulting from publicizing a competitive solicitation;
 - (4) The Federal awarding agency or pass-through entity expressly authorizes a noncompetitive procurement in response to a written request from the non-Federal entity; or
 - (5) After solicitation of a number of sources, competition is determined inadequate.

§200.321 Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

- (a) The non-Federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.
- (b) Affirmative steps must include:
 - (1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;
 - (2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;
 - (3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;

- (4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;
- (5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and
- (6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (b)(1) through (5) of this section.

§200.322 Domestic preferences for procurements.

- (a) As appropriate and to the extent consistent with law, the non-Federal entity should, to the greatest extent practicable under a Federal award, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). The requirements of this section must be included in all subawards including all contracts and purchase orders for work or products under this award.
- (b) For purposes of this section:
- (1) "Produced in the United States" means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.
- (2) "Manufactured products" means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

§200.323 Procurement of recovered materials.

A non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

§200.324 Contract cost and price.

(a) The non-Federal entity must perform a cost or price analysis in connection with every procurement action in excess of the Simplified Acquisition Threshold including contract amendments. The method and degree of analysis is dependent on the facts surrounding

- the particular procurement situation, but as a starting point, the non-Federal entity must make independent estimates before receiving bids or proposals.
- (b) The non-Federal entity must negotiate profit as a separate element of the price for each contract in which there is no price competition and in all cases where cost analysis is performed. To establish a fair and reasonable profit, consideration must be given to the complexity of the work to be performed, the risk borne by the contractor, the contractor's investment, the amount of subcontracting, the quality of its record of past performance, and industry profit rates in the surrounding geographical area for similar work.
- (c) Costs or prices based on estimated costs for contracts under the Federal award are allowable only to the extent that costs incurred or cost estimates included in negotiated prices would be allowable for the non-Federal entity under subpart E of this part. The non-Federal entity may reference its own cost principles that comply with the Federal cost principles.
- (d) The cost plus a percentage of cost and percentage of construction cost methods of contracting must not be used.

§200.325 Federal awarding agency or pass-through entity review.

- (a) The non-Federal entity must make available, upon request of the Federal awarding agency or pass-through entity, technical specifications on proposed procurements where the Federal awarding agency or pass-through entity believes such review is needed to ensure that the item or service specified is the one being proposed for acquisition. This review generally will take place prior to the time the specification is incorporated into a solicitation document. However, if the non-Federal entity desires to have the review accomplished after a solicitation has been developed, the Federal awarding agency or pass-through entity may still review the specifications, with such review usually limited to the technical aspects of the proposed purchase.
- (b) The non-Federal entity must make available upon request, for the Federal awarding agency or pass-through entity pre-procurement review, procurement documents, such as requests for proposals or invitations for bids, or independent cost estimates, when:
 - (1) The non-Federal entity's procurement procedures or operation fails to comply with the procurement standards in this part;
 - (2) The procurement is expected to exceed the Simplified Acquisition Threshold and is to be awarded without competition or only one bid or offer is received in response to a solicitation;
 - (3) The procurement, which is expected to exceed the Simplified Acquisition Threshold, specifies a "brand name" product;
 - (4) The proposed contract is more than the Simplified Acquisition Threshold and is to be awarded to other than the apparent low bidder under a sealed bid procurement; or

- (5) A proposed contract amendment changes the scope of a contract or increases the contract amount by more than the Simplified Acquisition Threshold.
- (c) The non-Federal entity is exempt from the pre-procurement review in paragraph (b) of this section if the Federal awarding agency or pass-through entity determines that its procurement systems comply with the standards of this part.
 - (1) The non-Federal entity may request that its procurement system be reviewed by the Federal awarding agency or pass-through entity to determine whether its system meets these standards in order for its system to be certified. Generally, these reviews must occur where there is continuous high-dollar funding, and third-party contracts are awarded on a regular basis;
 - (2) The non-Federal entity may self-certify its procurement system. Such self-certification must not limit the Federal awarding agency's right to survey the system. Under a self-certification procedure, the Federal awarding agency may rely on written assurances from the non-Federal entity that it is complying with these standards. The non-Federal entity must cite specific policies, procedures, regulations, or standards as being in compliance with these requirements and have its system available for review.

§200.326 Bonding requirements.

For construction or facility improvement contracts or subcontracts exceeding the Simplified Acquisition Threshold, the Federal awarding agency or pass-through entity may accept the bonding policy and requirements of the non-Federal entity provided that the Federal awarding agency or pass-through entity has made a determination that the Federal interest is adequately protected. If such a determination has not been made, the minimum requirements must be as follows:

- (a) A bid guarantee from each bidder equivalent to five percent of the bid price. The "bid guarantee" must consist of a firm commitment such as a bid bond, certified check, or other negotiable instrument accompanying a bid as assurance that the bidder will, upon acceptance of the bid, execute such contractual documents as may be required within the time specified.
- (b) A performance bond on the part of the contractor for 100 percent of the contract price. A "performance bond" is one executed in connection with a contract to secure fulfillment of all the contractor's requirements under such contract.
- (c) A payment bond on the part of the contractor for 100 percent of the contract price. A "payment bond" is one executed in connection with a contract to assure payment as required by law of all persons supplying labor and material in the execution of the work provided for in the contract.

§200.327 Contract provisions.

The non-Federal entity's contracts must contain the applicable provisions described in appendix II to this part.

[78 FR 78608, Dec. 26, 2013, as amended at 79 FR 75885, Dec. 19, 2014, and 85 FR 49506]

4. EQUIPMENT (2 CFR 200.313)

See also 200.439 Equipment and other capital expenditures.

- (a) Title. Subject to the obligations and conditions set forth in this section, title to equipment acquired under a Federal award will vest upon acquisition in the non-Federal entity. Unless a statute specifically authorizes the Federal agency to vest title in the non-Federal entity without further obligation to the Federal Government, and the Federal agency elects to do so, the title must be a conditional title. Title must vest in the non-Federal entity subject to the following conditions:
 - (1) Use the equipment for the authorized purposes of the project during the period of performance, or until the property is no longer needed for the purposes of the project.
 - (2) Not encumber the property without approval of the Federal awarding agency or pass-through entity.
 - (3) Use and dispose of the property in accordance with paragraphs (b), (c) and (e) of this section.
- (b) A state must use, manage and dispose of equipment acquired under a Federal award by the state in accordance with state laws and procedures. Other non-Federal entities must follow paragraphs (c) through (e) of this section.
- (c) Use.
 - (1) Equipment must be used by the non-Federal entity in the program or project for which it was acquired as long as needed, whether or not the project or program continues to be supported by the Federal award, and the non-Federal entity must not encumber the property without prior approval of the Federal awarding agency. When no longer needed for the original program or project, the equipment may be used in other activities supported by the Federal awarding agency, in the following order of priority:
 - (i) Activities under a Federal award from the Federal awarding agency which funded the original program or project, then
 - (ii) Activities under Federal awards from other Federal awarding agencies. This includes consolidated equipment for information technology systems.
 - (2) During the time that equipment is used on the project or program for which it was acquired, the non-Federal entity must also make equipment available for use on other projects or programs currently or previously supported by the Federal Government, provided that such use will not interfere with the work on the projects or program for which it was originally acquired. First preference for other use must be given to other

- programs or projects supported by Federal awarding agency that financed the equipment and second preference must be given to programs or projects under Federal awards from other Federal awarding agencies. Use for non-federally-funded programs or projects is also permissible. User fees should be considered if appropriate.
- (3) Notwithstanding the encouragement in 200.307 Program income to earn program income, the non-Federal entity must not use equipment acquired with the Federal award to provide services for a fee that is less than private companies charge for equivalent services unless specifically authorized by Federal statute for as long as the Federal Government retains an interest in the equipment.
- (4) When acquiring replacement equipment, the non-Federal entity may use the equipment to be replaced as a trade-in or sell the property and use the proceeds to offset the cost of the replacement property.
- (d) Management requirements. Procedures for managing equipment (including replacement equipment), whether acquired in whole or in part under a Federal award, until disposition takes place will, as a minimum, meet the following requirements:
 - (1) Property records must be maintained that include a description of the property, a serial number or other identification number, the source of funding for the property (including the FAIN), who holds title, the acquisition date, and cost of the property, percentage of Federal participation in the project costs for the Federal award under which the property was acquired, the location, use and condition of the property, and any ultimate disposition data including the date of disposal and sale price of the property.
 - (2) A physical inventory of the property must be taken and the results reconciled with the property records at least once every two years.
 - (3) A control system must be developed to ensure adequate safeguards to prevent loss, damage, or theft of the property. Any loss, damage, or theft must be investigated.
 - (4) Adequate maintenance procedures must be developed to keep the property in good condition.
 - (5) If the non-Federal entity is authorized or required to sell the property, proper sales procedures must be established to ensure the highest possible return.
- (e) Disposition. When original or replacement equipment acquired under a Federal award is no longer needed for the original project or program or for other activities currently or previously supported by a Federal awarding agency, except as otherwise provided in Federal statutes, regulations, or Federal awarding agency disposition instructions, the non-Federal entity must request disposition instructions from the Federal awarding agency if required by the terms and conditions of the Federal award. Disposition of the equipment will be made as follows, in accordance with Federal awarding agency disposition instructions:
 - (1) Items of equipment with a current per unit fair market value of \$5,000 or less may be retained, sold or otherwise disposed of with no further obligation to the Federal awarding agency.
 - (2) Except as provided in 200.312 Federally-owned and exempt property, paragraph (b), or if the Federal awarding agency fails to provide requested disposition instructions within

120 days, items of equipment with a current per-unit fair-market value in excess of \$5,000 may be retained by the non-Federal entity or sold. The Federal awarding agency is entitled to an amount calculated by multiplying the current market value or proceeds from sale by the Federal awarding agency's percentage of participation in the cost of the original purchase. If the equipment is sold, the Federal awarding agency may permit the non-Federal entity to deduct and retain from the Federal share \$500 or ten percent of the proceeds, whichever is less, for its selling and handling expenses.

- (3) The non-Federal entity may transfer title to the property to the Federal Government or to an eligible third party provided that, in such cases, the non-Federal entity must be entitled to compensation for its attributable percentage of the current fair market value of the property.
- (4) In cases where a non-Federal entity fails to take appropriate disposition actions, the Federal awarding agency may direct the non-Federal entity to take disposition actions.

[78 FR 78608, Dec. 26, 2013, as amended at 79 FR 75884, Dec. 19, 2014]

5. SUPPLIES (2 CFR 200.314)

See also 200.453 Materials and supplies costs, including costs of computing devices.

- (a) Title to supplies will vest in the non-Federal entity upon acquisition. If there is a residual inventory of unused supplies exceeding \$5,000 in total aggregate value upon termination or completion of the project or program and the supplies are not needed for any other Federal award, the non-Federal entity must retain the supplies for use on other activities or sell them, but must, in either case, compensate the Federal Government for its share. The amount of compensation must be computed in the same manner as for equipment. See 200.313 Equipment, paragraph (e)(2) for the calculation methodology.
- (b) As long as the Federal Government retains an interest in the supplies, the non-Federal entity must not use supplies acquired under a Federal award to provide services to other organizations for a fee that is less than private companies charge for equivalent services, unless specifically authorized by Federal statute.

6. INSPECTION

Reclamation has the right to inspect and evaluate the work performed or being performed under this Agreement, and the premises where the work is being performed, at all reasonable times and in a manner that will not unduly delay the work. If Reclamation performs inspection or evaluation on the premises of the Recipient or a sub-Recipient, the Recipient shall furnish and shall require sub-recipients to furnish all reasonable facilities and assistance for the safe and convenient performance of these duties.

7. AUDIT REQUIREMENTS (2 CFR 200.501)

- (a) Audit required. A non-Federal entity that expends \$750,000 or more during the non-Federal entity's fiscal year in Federal awards must have a single or program-specific audit conducted for that year in accordance with the provisions of this part.
- (b) Single audit. A non-Federal entity that expends \$750,000 or more during the non-Federal entity's fiscal year in Federal awards must have a single audit conducted in accordance with 200.514 Scope of audit except when it elects to have a program-specific audit conducted in accordance with paragraph (c) of this section.
- (c) Program-specific audit election. When an auditee expends Federal awards under only one Federal program (excluding R&D) and the Federal program's statutes, regulations, or the terms and conditions of the Federal award do not require a financial statement audit of the auditee, the auditee may elect to have a program-specific audit conducted in accordance with 200.507 Program-specific audits. A program-specific audit may not be elected for R&D unless all of the Federal awards expended were received from the same Federal agency, or the same Federal agency and the same pass-through entity, and that Federal agency, or pass-through entity in the case of a subrecipient, approves in advance a program-specific audit.
- (d) Exemption when Federal awards expended are less than \$750,000. A non-Federal entity that expends less than \$750,000 during the non-Federal entity's fiscal year in Federal awards is exempt from Federal audit requirements for that year, except as noted in 200.503 Relation to other audit requirements, but records must be available for review or audit by appropriate officials of the Federal agency, pass-through entity, and Government Accountability Office (GAO).
- (e) Federally Funded Research and Development Centers (FFRDC). Management of an auditee that owns or operates a FFRDC may elect to treat the FFRDC as a separate entity for purposes of this part.
- (f) Subrecipients and Contractors. An auditee may simultaneously be a recipient, a subrecipient, and a contractor. Federal awards expended as a recipient or a subrecipient are subject to audit under this part. The payments received for goods or services provided as a contractor are not Federal awards. Section 200.331 Subrecipient and contractor determinations sets forth the considerations in determining whether payments constitute a Federal award or a payment for goods or services provided as a contractor.
- (g) Compliance responsibility for contractors. In most cases, the auditee's compliance responsibility for contractors is only to ensure that the procurement, receipt, and payment for goods and services comply with Federal statutes, regulations, and the terms and conditions of Federal awards. Federal award compliance requirements normally do not pass through to contractors. However, the auditee is responsible for ensuring compliance for procurement transactions which are structured such that the contractor is responsible for program compliance or the contractor's records must be reviewed to determine program compliance. Also, when these procurement transactions relate to a major program, the scope of the audit must include determining whether these transactions are in compliance with Federal statutes, regulations, and the terms and conditions of Federal awards.

(h) For-profit subrecipient. Since this part does not apply to for-profit subrecipients, the pass-through entity is responsible for establishing requirements, as necessary, to ensure compliance by for-profit subrecipients. The agreement with the for-profit subrecipient must describe applicable compliance requirements and the for-profit subrecipient's compliance responsibility. Methods to ensure compliance for Federal awards made to for-profit subrecipients may include pre-award audits, monitoring during the agreement, and post-award audits. See also 200.332 Requirements for pass-through entities.

[78 FR 78608, Dec. 26, 2013, as amended at 79 FR 75887, Dec. 19, 2014; 85 FR 49571, Aug. 13, 2020]

8. REMEDIES FOR NONCOMPLIANCE (2 CFR 200.339)

200.339 Remedies for noncompliance.

If a non-Federal entity fails to comply with Federal statutes, regulations or the terms and conditions of a Federal award, the Federal awarding agency or pass-through entity may impose additional conditions, as described in 200.207 Specific conditions. If the Federal awarding agency or pass-through entity determines that noncompliance cannot be remedied by imposing additional conditions, the Federal awarding agency or pass-through entity may take one or more of the following actions, as appropriate in the circumstances.

- (a) Temporarily withhold cash payments pending correction of the deficiency by the non-Federal entity or more severe enforcement action by the Federal awarding agency or pass-through entity.
- (b) Disallow (that is, deny both use of funds and any applicable matching credit for) all or part of the cost of the activity or action not in compliance.
- (c) Wholly or partly suspend or terminate the Federal award.
- (d) Initiate suspension or debarment proceedings as authorized under 2 CFR part 180 and Federal awarding agency regulations (or in the case of a pass-through entity, recommend such a proceeding be initiated by a Federal awarding agency).
- (e) Withhold further Federal awards for the project or program.
- (f) Take other remedies that may be legally available.

9. TERMINATION (2 CFR 200.340)

- (a) The Federal award may be terminated in whole or in part as follows:
 - (1) By the Federal awarding agency or pass-through entity, if a non-Federal entity fails to comply with the terms and conditions of a Federal award;
 - (2) By the Federal awarding agency or pass-through entity, to the greatest extent authorized by law, if an award no longer effectuates the program goals or agency priorities;
 - (3) By the Federal awarding agency or pass-through entity with the consent of the non-Federal entity, in which case the two parties must agree upon the termination conditions, including the effective date and, in the case of partial termination, the portion to be terminated;

- (4) By the non-Federal entity upon sending to the Federal awarding agency or pass-through entity written notification setting forth the reasons for such termination, the effective date, and, in the case of partial termination, the portion to be terminated. However, if the Federal awarding agency or pass-through entity determines in the case of partial termination that the reduced or modified portion of the Federal award or subaward will not accomplish the purposes for which the Federal award was made, the Federal awarding agency or pass-through entity may terminate the Federal award in its entirety; or
- (5) By the Federal awarding agency or pass-through entity pursuant to termination provisions included in the Federal award.
- (b) When a Federal award is terminated or partially terminated, both the Federal awarding agency or pass-through entity and the non-Federal entity remain responsible for compliance with the requirements in 200.344 Closeout and 200.345 Post-closeout adjustments and continuing responsibilities.

10. DEBARMENT AND SUSPENSION (2 CFR 1400)

The Department of the Interior regulations at 2 CFR 1400—Governmentwide Debarment and Suspension (Nonprocurement), which adopt the common rule for the governmentwide system of debarment and suspension for nonprocurement activities, are hereby incorporated by reference and made a part of this Agreement. By entering into this grant or cooperative Agreement with the Bureau of Reclamation, the Recipient agrees to comply with 2 CFR 1400, Subpart C, and agrees to include a similar term or condition in all lower-tier covered transactions. These regulations are available at http://www.gpoaccess.gov/ecfr/.

11. DRUG-FREE WORKPLACE (2 CFR 182 and 1401)

The Department of the Interior regulations at 2 CFR 1401—Governmentwide Requirements for Drug-Free Workplace (Financial Assistance), which adopt the portion of the Drug-Free Workplace Act of 1988 (41 U.S.C. 701 et seq, as amended) applicable to grants and cooperative agreements, are hereby incorporated by reference and made a part of this agreement. By entering into this grant or cooperative agreement with the Bureau of Reclamation, the Recipient agrees to comply with 2 CFR 182.

12. ASSURANCES AND CERTIFICATIONS INCORPORATED BY REFERENCE

The provisions of the Assurances, SF 424B or SF 424D as applicable, executed by the Recipient in connection with this Agreement shall apply with full force and effect to this Agreement. All anti-discrimination and equal opportunity statutes, regulations, and Executive Orders that apply to the expenditure of funds under Federal contracts, grants, and cooperative Agreements, loans, and other forms of Federal assistance. The Recipient shall comply with Title VI or the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, the Age Discrimination Act of 1975, and any program-specific statutes with anti-discrimination requirements. The Recipient shall comply with civil rights laws

including, but not limited to, the Fair Housing Act, the Fair Credit Reporting Act, the Americans with Disabilities Act, Title VII of the Civil Rights Act of 1964, the Equal Educational Opportunities Act, the Age Discrimination in Employment Act, and the Uniform Relocation Act.

Such Assurances also include, but are not limited to, the promise to comply with all applicable Federal statutes and orders relating to nondiscrimination in employment, assistance, and housing; the Hatch Act; Federal wage and hour laws and regulations and workplace safety standards; Federal environmental laws and regulations and the Endangered Species Act; and Federal protection of rivers and waterways and historic and archeological preservation.

13. COVENANT AGAINST CONTINGENT FEES

The Recipient warrants that no person or agency has been employed or retained to solicit or secure this Agreement upon an Agreement or understanding for a commission, percentage, brokerage, or contingent fee, excepting bona fide employees or bona fide offices established and maintained by the Recipient for the purpose of securing Agreements or business. For breach or violation of this warranty, the Government shall have the right to annul this Agreement without liability or, in its discretion, to deduct from the Agreement amount, or otherwise recover, the full amount of such commission, percentage, brokerage, or contingent fee.

14. TRAFFICKING VICTIMS PROTECTION ACT OF 2000 (2 CFR 175.15)

Trafficking in persons.

- (a) Provisions applicable to a recipient that is a private entity. You as the recipient, your employees, subrecipients under this award, and subrecipients' employees may not
 - (1) Engage in severe forms of trafficking in persons during the period of time that the award is in effect;
 - (2) Procure a commercial sex act during the period of time that the award is in effect; or
 - (3) Use forced labor in the performance of the award or subawards under the award.
- (b) We as the Federal awarding agency may unilaterally terminate this award, without penalty, if you or a subrecipient that is a private entity
 - (1) Is determined to have violated a prohibition in paragraph a.1 of this award term; or
 - (2) Has an employee who is determined by the agency official authorized to terminate the award to have violated a prohibition in paragraph a.1 of this award term through conduct that is either:
 - (i) Associated with performance under this award; or
 - (ii) Imputed to you or the subrecipient using the standards and due process for imputing the conduct of an individual to an organization that are provided in 2 CFR part 180, "OMB Guidelines to Agencies on Governmentwide Debarment and Suspension (Nonprocurement)," as implemented by our agency at 2 CFR part 1400.

- (c) Provision applicable to a recipient other than a private entity. We as the Federal awarding agency may unilaterally terminate this award, without penalty, if a subrecipient that is a private entity—
 - (1) Is determined to have violated an applicable prohibition in paragraph a.1 of this award term; or
 - (2) Has an employee who is determined by the agency official authorized to terminate the award to have violated an applicable prohibition in paragraph a.1 of this award term through conduct that is either:
 - (i) Associated with performance under this award; or
 - (ii) Imputed to the subrecipient using the standards and due process for imputing the conduct of an individual to an organization that are provided in 2 CFR part 180, "OMB Guidelines to Agencies on Governmentwide Debarment and Suspension (Nonprocurement)," as implemented by our agency at 2 CFR part 1400.
- (d) *Provisions applicable to any recipient.*
 - (1) You must inform us immediately of any information you receive from any source alleging a violation of a prohibition in paragraph a.1 of this award term.
 - (2) Our right to terminate unilaterally that is described in paragraph a.2 or b of this section:
 - (i) Implements section 106(g) of the Trafficking Victims Protection Act of 2000 (TVPA), as amended (22 U.S.C. 7104(g)), and
 - (ii) Is in addition to all other remedies for noncompliance that are available to us under this award.
 - (3) You must include the requirements of paragraph a.1 of this award term in any subaward you make to a private entity.
- (e) *Definitions*. For purposes of this award term:
 - (1) "Employee" means either:
 - (i) An individual employed by you or a subrecipient who is engaged in the performance of the project or program under this award; or
 - (ii) Another person engaged in the performance of the project or program under this award and not compensated by you including, but not limited to, a volunteer or individual whose services are contributed by a third party as an in-kind contribution toward cost sharing or matching requirements.
 - (2) "Forced labor" means labor obtained by any of the following methods: the recruitment, harboring, transportation, provision, or obtaining of a person for labor or services, through the use of force, fraud, or coercion for the purpose of subjection to involuntary servitude, peonage, debt bondage, or slavery.

- (3) "Private entity":
 - (i) Means any entity other than a state, local government, Indian tribe, or foreign public entity, as those terms are defined in 2 CFR 175.25.
 - (ii) Includes:
 - (A) A nonprofit organization, including any nonprofit institution of higher education, hospital, or tribal organization other than one included in the definition of Indian tribe at 2 CFR 175.25(b).
 - (B) A for-profit organization.
- (4) "Severe forms of trafficking in persons," "commercial sex act," and "coercion" have the meanings given at section 103 of the TVPA, as amended (22 U.S.C. 7102).

15. NEW RESTRICTIONS ON LOBBYING (43 CFR 18)

The Recipient agrees to comply with 43 CFR 18, New Restrictions on Lobbying, including the following certification:

- (a) No Federal appropriated funds have been paid or will be paid, by or on behalf of the Recipient, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or amendment of any Federal contract, grant, loan, or cooperative agreement.
- (b) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying" in accordance with its instructions.
- (c) The Recipient shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

16. UNIFORM RELOCATION ASSISTANCE AND REAL PROPERTY ACQUISITION POLICIES ACT OF 1970 (URA) (42 USC 4601 et seq.)

- (a) The Uniform Relocation Assistance Act (URA), 42 U.S.C. 4601 *et seq.*, as amended, requires certain assurances for Reclamation funded land acquisition projects conducted by a Recipient that cause the displacement of persons, businesses, or farm operations. Because Reclamation funds only support acquisition of property or interests in property from willing sellers, it is not anticipated that Reclamation funds will result in any "displaced persons," as defined under the URA.
- (b) However, if Reclamation funds are used for the acquisition of real property that results in displacement, the URA requires Recipients to ensure that reasonable relocation payments and other remedies will be provided to any displaced person. Further, when acquiring real property, Recipients must be guided, to the greatest extent practicable, by the land acquisition policies in 42 U.S.C. 4651.
- (c) Exemptions to the URA and 49 CFR Part 24
 - (1) The URA provides for an exemption to the appraisal, review and certification rules for those land acquisitions classified as "voluntary transactions." Such "voluntary transactions" are classified as those that do not involve an exercise of eminent domain authority on behalf of a Recipient, and must meet the conditions specified at 49 CFR 24.101(b)(1)(i)-(iv).
 - (2) For any land acquisition undertaken by a Recipient that receives Reclamation funds, but does not have authority to acquire the real property by eminent domain, to be exempt from the requirements of 49 CFR Part 24 the Recipient must:
 - (i) provide written notification to the owner that it will not acquire the property in the event negotiations fail to result in an amicable agreement, and;
 - (ii) inform the owner in writing of what it believes to be the market value of the property
- (d) Review of Land Acquisition Appraisals. Reclamation reserves the right to review any land appraisal whether or not such review is required under the URA or 49 CFR 4.104. Such reviews may be conducted by the Department of the Interior's Appraisal Services Directorate or a Reclamation authorized designee. When Reclamation determines that a review of the original appraisal is necessary, Reclamation will notify the Recipient and provide an estimated completion date of the initial appraisal review.

17. SYSTEM FOR AWARD MANAGEMENT AND UNIVERSAL IDENTIFIER REQUIREMENTS (2 CFR 25, APPENDIX A)

A. Requirement for System for Award Management

Unless you are exempted from this requirement under 2 CFR 25.110, you as the recipient must maintain current information in the SAM. This includes information on your immediate and highest level owner and subsidiaries, as well as on all of your predecessors that have been awarded a Federal contract or Federal financial assistance within the last three years, if applicable, until you submit the final financial report required under this Federal award or receive the final payment, whichever is later. This requires that you review and update the information at least annually after the initial registration, and more frequently if required by changes in your information or another Federal award term.

B. Requirement for unique entity identifier

If you are authorized to make subawards under this award, you:

- 1. Must notify potential subrecipients that no entity (see definition in paragraph C of this award term) may receive a subaward from you unless the entity has provided its unique entity identifier to you.
- 2. May not make a subaward to an entity unless the entity has provided its Unique Entity Identifier to you. Subrecipients are not required to obtain an active SAM registration, but must obtain a Unique Entity Identifier.

C. Definitions

For purposes of this award term:

- 1. System for Award Management (SAM) means the Federal repository into which an entity must provide information required for the conduct of business as a recipient. Additional information about registration procedures may be found at the SAM Internet site (currently at http://www.sam.gov).
- 2. Unique entity identifier means the identifier required for SAM registration to uniquely identify business entities.
- 3. Entity, as it is used in this award term, means all of the following, as defined at 2 CFR part 25, subpart C:
 - a. A Governmental organization, which is a State, local government, or Indian Tribe;
 - b. A foreign public entity;
 - c. A domestic or foreign nonprofit organization;
 - d. A domestic or foreign for-profit organization; and
 - e. A Federal agency, but only as a subrecipient under an award or subaward to a non-Federal entity.
- 4. Subaward has the meaning given in 2 CFR 200.1.

5. Subrecipient has the meaning given in 2 CFR 200.1.

18. PROHIBITION ON TEXT MESSAGING AND USING ELECTRONIC EQUIPMENT SUPPLIED BY THE GOVERNMENT WHILE DRIVING

Executive Order 13513, Federal Leadership On Reducing Text Messaging While Driving, was signed by President Barack Obama on October 1, 2009 (ref: http://edocket.access.gpo.gov/2009/pdf/E9-24203.pdf). This Executive Order introduces a Federal Government-wide prohibition on the use of text messaging while driving on official business or while using Government-supplied equipment. Additional guidance enforcing the ban will be issued at a later date. In the meantime, please adopt and enforce policies that immediately ban text messaging while driving company-owned or rented vehicles, government-owned or leased vehicles, or while driving privately owned vehicles when on official government business or when performing any work for or on behalf of the government.

19. REPORTING SUBAWARDS AND EXECUTIVE COMPENSATION (2 CFR 170 APPENDIX A)

- I. Reporting Subawards and Executive Compensation.
 - a. Reporting of first-tier subawards.
 - 1. Applicability. Unless you are exempt as provided in paragraph d. of this award term, you must report each action that equals or exceeds \$30,000 in Federal funds for a subaward to a non-Federal entity or Federal agency (see definitions in paragraph e. of this award term).
 - 2. Where and when to report.
 - i. The non-Federal entity or Federal agency must report each obligating action described in paragraph a.1. of this award term to http://www.fsrs.gov.
 - ii. For subaward information, report no later than the end of the month following the month in which the obligation was made. (For example, if the obligation was made on November 7, 2010, the obligation must be reported by no later than December 31, 2010.)
 - 3. What to report. You must report the information about each obligating action that the submission instructions posted at http://www.fsrs.gov specify.
 - b. Reporting total compensation of recipient executives for non-Federal entities.
 - 1. Applicability and what to report. You must report total compensation for each of your five most highly compensated executives for the preceding completed fiscal year, if
 - i. The total Federal funding authorized to date under this Federal award equals or exceeds \$30,000 as defined in 2 CFR 170.320;

- ii. in the preceding fiscal year, you received—
 - (A) 80 percent or more of your annual gross revenues from Federal procurement contracts (and subcontracts) and Federal financial assistance subject to the Transparency Act, as defined at 2 CFR 170.320 (and subawards), and
 - (B) \$25,000,000 or more in annual gross revenues from Federal procurement contracts (and subcontracts) and Federal financial assistance subject to the Transparency Act, as defined at 2 CFR 170.320 (and subawards); and,
- iii. The public does not have access to information about the compensation of the executives through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986. (To determine if the public has access to the compensation information, see the U.S. Security and Exchange Commission total compensation filings at http://www.sec.gov/answers/execomp.htm.)
- 2. Where and when to report. You must report executive total compensation described in paragraph b.1. of this award term:
 - i. As part of your registration profile at https://www.sam.gov.
 - ii. By the end of the month following the month in which this award is made, and annually thereafter.
- c. Reporting of Total Compensation of Subrecipient Executives.
 - 1. Applicability and what to report. Unless you are exempt as provided in paragraph d. of this award term, for each first-tier non-Federal entity subrecipient under this award, you shall report the names and total compensation of each of the subrecipient's five most highly compensated executives for the subrecipient's preceding completed fiscal year, if
 - i. in the subrecipient's preceding fiscal year, the subrecipient received—
 - (A) 80 percent or more of its annual gross revenues from Federal procurement contracts (and subcontracts) and Federal financial assistance subject to the Transparency Act, as defined at 2 CFR 170.320 (and subawards) and,
 - (B) \$25,000,000 or more in annual gross revenues from Federal procurement contracts (and subcontracts), and Federal financial assistance subject to the Transparency Act (and subawards); and
 - ii. The public does not have access to information about the compensation of the executives through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986. (To determine if the public has access to the compensation information, see the U.S. Security and Exchange Commission total compensation filings at http://www.sec.gov/answers/execomp.htm.)

- 2. Where and when to report. You must report subrecipient executive total compensation described in paragraph c.1. of this award term:
 - i. To the recipient.
 - ii. By the end of the month following the month during which you make the subaward. For example, if a subaward is obligated on any date during the month of October of a given year (i.e., between October 1 and 31), you must report any required compensation information of the subrecipient by November 30 of that year.

d. Exemptions.

If, in the previous tax year, you had gross income, from all sources, under \$300,000, you are exempt from the requirements to report:

- i. Subawards, and
- ii. The total compensation of the five most highly compensated executives of any subrecipient.
- e. Definitions. For purposes of this award term:
 - 1. Federal Agency means a Federal agency as defined at 5 U.S.C. 551(1) and further clarified by 5 U.S.C. 552(f).
 - 2. Non-Federal entity means all of the following, as defined in 2 CFR part 25:
 - i. A Governmental organization, which is a State, local government, or Indian tribe;
 - ii. A foreign public entity;
 - iii. A domestic or foreign nonprofit organization; and,
 - iv. A domestic or foreign for-profit organization
 - 3. Executive means officers, managing partners, or any other employees in management positions.
 - 4. Subaward:
 - i. This term means a legal instrument to provide support for the performance of any portion of the substantive project or program for which you received this award and that you as the recipient award to an eligible subrecipient.
 - ii. The term does not include your procurement of property and services needed to carry out the project or program (for further explanation, see 2 CFR 200.331).
 - iii. A subaward may be provided through any legal agreement, including an agreement that you or a subrecipient considers a contract.
 - 5. Subrecipient means a non-Federal entity or Federal agency that:
 - i. Receives a subaward from you (the recipient) under this award; and
 - ii. Is accountable to you for the use of the Federal funds provided by the subaward.

6. Total compensation means the cash and noncash dollar value earned by the executive during the recipient's or subrecipient's preceding fiscal year and includes the following (for more information see 17 CFR 229.402(c)(2)).

[85 FR 49526, Aug. 13, 2020]

20. RECIPIENT EMPLOYEE WHISTLEBLOWER RIGHTS AND REQUIREMENT TO INFORM EMPLOYEES OF WHISTLEBLOWER RIGHTS (SEP 2013)

- (a) This award and employees working on this financial assistance agreement will be subject to the whistleblower rights and remedies in the pilot program on Award Recipient employee whistleblower protections established at 41 U.S.C. 4712 by section 828 of the National Defense Authorization Act for Fiscal Year 2013 (Pub.L. 112-239).
- (b) The Award Recipient shall inform its employees in writing, in the predominant language of the workforce, of employee whistleblower rights and protections under 41 U.S.C 4712.
- (c) The Award Recipient shall insert the substance of this clause, including this paragraph (c), in all subawards or subcontracts over the simplified acquisition threshold. 48 CFR 52.203-17 (as referenced in 48 CFR 3.908-9).

21. REPORTING OF MATTERS RELATED TO RECIPIENT INTEGRITY AND PERFORMANCE (APPENDIX XII to 2 CFR PART 200)

1. General Reporting Requirement

If the total value of your currently active grants, cooperative agreements, and procurement contracts from all Federal awarding agencies exceeds \$10,000,000 for any period of time during the period of performance of this Federal award, then you as the recipient during that period of time must maintain the currency of information reported to the System for Award Management (SAM) that is made available in the designated integrity and performance system (currently the Federal Awardee Performance and Integrity Information System (FAPIIS)) about civil, criminal, or administrative proceedings described in paragraph 2 of this award term and condition. This is a statutory requirement under section 872 of Public Law 110-417, as amended (41 U.S.C. 2313). As required by section 3010 of Public Law 111-212, all information posted in the designated integrity and performance system on or after April 15, 2011, except past performance reviews required for Federal procurement contracts, will be publicly available.

2. Proceedings About Which You Must Report

Submit the information required about each proceeding that:

- a. Is in connection with the award or performance of a grant, cooperative agreement, or procurement contract from the Federal Government;
- b. Reached its final disposition during the most recent five-year period; and

c. Is one of the following:

- (1) A criminal proceeding that resulted in a conviction, as defined in paragraph 5 of this award term and condition;
- (2) A civil proceeding that resulted in a finding of fault and liability and payment of a monetary fine, penalty, reimbursement, restitution, or damages of \$5,000 or more;
- (3) An administrative proceeding, as defined in paragraph 5. of this award term and condition, that resulted in a finding of fault and liability and your payment of either a monetary fine or penalty of \$5,000 or more or reimbursement, restitution, or damages in excess of \$100,000; or
- (4) Any other criminal, civil, or administrative proceeding if:
 - (i) It could have led to an outcome described in paragraph 2.c.(1), (2), or (3) of this award term and condition;
 - (ii) It had a different disposition arrived at by consent or compromise with an acknowledgment of fault on your part; and
 - (iii) The requirement in this award term and condition to disclose information about the proceeding does not conflict with applicable laws and regulations.

3. Reporting Procedures

Enter in the SAM Entity Management area the information that SAM requires about each proceeding described in paragraph 2 of this award term and condition. You do not need to submit the information a second time under assistance awards that you received if you already provided the information through SAM because you were required to do so under Federal procurement contracts that you were awarded.

4. Reporting Frequency

During any period of time when you are subject to the requirement in paragraph 1 of this award term and condition, you must report proceedings information through SAM for the most recent five year period, either to report new information about any proceeding(s) that you have not reported previously or affirm that there is no new information to report. Recipients that have Federal contract, grant, and cooperative agreement awards with a cumulative total value greater than \$10,000,000 must disclose semiannually any information about the criminal, civil, and administrative proceedings.

5. Definitions

For purposes of this award term and condition:

a. Administrative proceeding means a non-judicial process that is adjudicatory in nature in order to make a determination of fault or liability (e.g., Securities and Exchange Commission Administrative proceedings, Civilian Board of Contract Appeals proceedings, and Armed Services Board of Contract Appeals proceedings). This includes proceedings at the Federal and State level but only in connection with performance of a

- Federal contract or grant. It does not include audits, site visits, corrective plans, or inspection of deliverables.
- b. Conviction, for purposes of this award term and condition, means a judgment or conviction of a criminal offense by any court of competent jurisdiction, whether entered upon a verdict or a plea, and includes a conviction entered upon a plea of nolo contendere.
- c. Total value of currently active grants, cooperative agreements, and procurement contracts includes—
 - (1) Only the Federal share of the funding under any Federal award with a recipient cost share or match; and
 - (2) The value of all expected funding increments under a Federal award and options, even if not yet exercised.

[80 FR 43310, July 22, 2015, as amended at 85 FR 49582, Aug. 13, 2020]

22. CONFLICTS OF INTEREST

- (a) Applicability.
 - (1) This section intends to ensure that non-Federal entities and their employees take appropriate steps to avoid conflicts of interest in their responsibilities under or with respect to Federal financial assistance agreements.
 - (2) In the procurement of supplies, equipment, construction, and services by recipients and by subrecipients, the conflict-of-interest provisions in 2 CFR 200.318 apply.
- (b) Requirements.
 - (1) Non-Federal entities must avoid prohibited conflicts of interest, including any significant financial interests that could cause a reasonable person to question the recipient's ability to provide impartial, technically sound, and objective performance under or with respect to a Federal financial assistance agreement.
 - (2) In addition to any other prohibitions that may apply with respect to conflicts of interest, no key official of an actual or proposed recipient or subrecipient, who is substantially involved in the proposal or project, may have been a former Federal employee who, within the last one (1) year, participated personally and substantially in the evaluation, award, or administration of an award with respect to that recipient or subrecipient or in development of the requirement leading to the funding announcement.
 - (3) No actual or prospective recipient or subrecipient may solicit, obtain, or use non-public information regarding the evaluation, award, or administration of an award to that recipient or subrecipient or the development of a Federal financial assistance opportunity that may be of competitive interest to that recipient or subrecipient.

(c) Notification.

- (1) Non-Federal entities, including applicants for financial assistance awards, must disclose in writing any conflict of interest to the DOI awarding agency or pass-through entity in accordance with 2 CFR 200.112, Conflicts of Interest.
- (2) Recipients must establish internal controls that include, at a minimum, procedures to identify, disclose, and mitigate or eliminate identified conflicts of interest. The recipient is responsible for notifying the Financial Assistance Officer in writing of any conflicts of interest that may arise during the life of the award, including those that have been reported by subrecipients.
- (d) Restrictions on Lobbying. Non-Federal entities are strictly prohibited from using funds under this grant or cooperative agreement for lobbying activities and must provide the required certifications and disclosures pursuant to 43 CFR Part 18 and 31 USC 1352.
- (e) Review Procedures. The Financial Assistance Officer will examine each conflict-of-interest disclosure on the basis of its particular facts and the nature of the proposed grant or cooperative agreement, and will determine whether a significant potential conflict exists and, if it does, develop an appropriate means for resolving it.
- (f) Enforcement. Failure to resolve conflicts of interest in a manner that satisfies the Government may be cause for termination of the award. Failure to make required disclosures may result in any of the remedies described in 2 CFR 200.338, Remedies for Noncompliance, including suspension or debarment (see also 2 CFR Part 180).

23. DATA AVAILABILITY

- (a) Applicability. The Department of the Interior is committed to basing its decisions on the best available science and providing the American people with enough information to thoughtfully and substantively evaluate the data, methodology, and analysis used by the Department to inform its decisions.
- (b) Use of Data. The regulations at 2 CFR 200.315 apply to data produced under a Federal award, including the provision that the Federal Government has the right to obtain, reproduce, publish, or otherwise use the data produced under a Federal award as well as authorize others to receive, reproduce, publish, or otherwise use such data for Federal purposes.
- (c) Availability of Data. The recipient shall make the data produced under this award and any subaward(s) available to the Government for public release, consistent with applicable law, to allow meaningful third-party evaluation and reproduction of the following:
 - (i) The scientific data relied upon;
 - (ii) The analysis relied upon; and
 - (iii) The methodology, including models, used to gather and analyze data.

24. PROHIBITION ON PROVIDING FUNDS TO THE ENEMY

- (a) The recipient must—
 - (1) Exercise due diligence to ensure that none of the funds, including supplies and services, received under this grant or cooperative agreement are provided directly or indirectly (including through subawards or contracts) to a person or entity who is actively opposing the United States or coalition forces involved in a contingency operation in which members of the Armed Forces are actively engaged in hostilities, which must be completed through 2 CFR 180.300 prior to issuing a subaward or contract and;
 - (2) Terminate or void in whole or in part any subaward or contract with a person or entity listed in SAM as a prohibited or restricted source pursuant to subtitle E of Title VIII of the NDAA for FY 2015, unless the Federal awarding agency provides written approval to continue the subaward or contract.
- (b) The recipient may include the substance of this clause, including paragraph (a) of this clause, in subawards under this grant or cooperative agreement that have an estimated value over \$50,000 and will be performed outside the United States, including its outlying areas.
- (c) The Federal awarding agency has the authority to terminate or void this grant or cooperative agreement, in whole or in part, if the Federal awarding agency becomes aware that the recipient failed to exercise due diligence as required by paragraph (a) of this clause or if the Federal awarding agency becomes aware that any funds received under this grant or cooperative agreement have been provided directly or indirectly to a person or entity who is actively opposing coalition forces involved in a contingency operation in which members of the Armed Forces are actively engaged in hostilities.

25. ADDITIONAL ACCESS TO RECIPIENT RECORDS

- (a) In addition to any other existing examination-of-records authority, the Federal Government is authorized to examine any records of the recipient and its subawards or contracts to the extent necessary to ensure that funds, including supplies and services, available under this grant or cooperative agreement are not provided, directly or indirectly, to a person or entity that is actively opposing United States or coalition forces involved in a contingency operation in which members of the Armed Forces are actively engaged in hostilities, except for awards awarded by the Department of Defense on or before Dec 19, 2017 that will be performed in the United States Central Command (USCENTCOM) theater of operations.
- (b) The substance of this clause, including this paragraph (b), is required to be included in subawards or contracts under this grant or cooperative agreement that have an estimated value over \$50,000 and will be performed outside the United States, including its outlying areas.

26. PROHIBITION ON CERTAIN TELECOMMUNICATION AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT

Federal award recipients are prohibited from using government funds to enter contracts (or extend or renew contracts) with entities that use covered telecommunications equipment or services as described in section 889 of the 2019 National Defense Authorization Act. This prohibition applies even if the contract is not intended to procure or obtain, any equipment, system, or service that uses covered telecommunications equipment or services.

III. DEPARTMENT OF THE INTERIOR STANDARD AWARD TERMS AND CONDITIONS

The Department of the Interior (DOI) Standard Award Terms and Conditions found at https://www.doi.gov/sites/doi.gov/files/uploads/doi-standard-award-terms-and-conditions-effective-december-2-2019-revised-june-19-2020.pdf are hereby incorporated by reference as though set forth in full text. These terms and conditions are in addition to the assurances and certifications made as part of the award and terms, conditions or restrictions reflected on this Agreement. Recipient acceptance of this Agreement carries with it the responsibility to be aware of and comply with all DOI terms and conditions applicable to this Agreement. The Recipient is responsible for ensuring their subrecipients and contractors are aware of and comply with applicable statutes, regulations, and agency requirements.

Recipient and subrecipient failure to comply with the general terms and conditions outlined below and those directly reflected in this Agreement can result in the DOI taking one or more of remedies described in 2 Code of Federal Regulations parts 200.338 and 200.339. The DOI will notify the recipient whenever terms and conditions are updated to accommodate instances in the passage of a regulation or statute that requires compliance. Also, DOI will inform the Recipient of revised terms and conditions in the action of an Agreement amendment adding additional Federal funds. Reclamation will make such changes by issuing a Notice of Award amendment that describes the change and provides the effective date. Revised terms and conditions do not apply to the Recipient's expenditures of funds or activities the Recipient carries out before the effective date of the revised DOI terms and conditions.

Project Abstract

Grantee Name: CITY OF NORMAN **Grant Number:** R22AP00241-00

Project Title: Lake Thunderbird Predictive Lake Level Optimization Tool (PLOT)

Project Period: 03/31/2022 - 03/31/2024

The Norman Utilities Authority, located in Norman, Oklahoma, will collaborate with the National Water Research Institute to develop a Predictive Lake Level Optimization Tool (PLOT) for the Lake Thunderbird watershed in Central Oklahoma. This new water-balance tool help water managers implement the planned lake augmentation system by providing support for the timing and duration of pumping. Effective management of a reservoir's conservation pool is critical to the survival of any surface water body during prolonged drought periods. The new forecasting tool for lake water-level will play an important role during these periods. The project will seek to establish proof-of-concept for a model that, in subsequent work, can link to real-time data collection, make forecasts of the lake's water balance and the augmentation needed. The PLOT forecasts will consider both near-term precipitation projections and statistical climatological trends to identify the preferred augmentation flows to optimize lake yield, conjunctive groundwater use, drought risk mitigation, and augmentation volumes. The project will further the regional goal of a sustainable, shared water reservoir by constructing a cloud-based tool to allow for transparent, smart augmentation flow pumping to Lake Thunderbird.

RESOLUTION R-2223-23

A RESOLUTION OF THE NORMAN UTILITIES AUTHORITY AUTHORIZING CHAIRMAN TO ACCEPT A WATERSMART: APPLIED SCIENCE GRANT FROM THE BUREAU OF RECLAMATION FOR LAKE THUNDERBIRD PREDICTIVE LAKE OPTIMIZATION TOOL PROJECT.

- 1. WHEREAS, the United States Bureau of Reclamation (BOR) has a funding program entitled "WaterSMART Applied Science Grants" and pursuant to this program, the BOR provides cost-shared financial assistance to organizations with water delivery authority for projects to develop hydrologic information and water management tools and improve modeling and forecasting capabilities.
- 2. WHEREAS, the Norman Utilities Authority (NUA) continues to advance the Lake Thunderbird Indirect Potable Reuse (IPR) Project and, as part of the project, has identified the development of Predictive Lake Optimization Tool (PLOT) as a critical piece of any future IPR because a PLOT uses precipitation and climatological data and trends to create a model that will identify the best times and quantities for augmentation flows to Lake Thunderbird that will, in turn, optimize lake yield and conjunctive groundwater use as well as mitigate drought risks and their potential impact on the lake.
- 3. WHEREAS, BOR has approved Assistance Agreement No. R22AP00241 for a WaterSMART Applied Science Grant in the amount of \$148,339.00 for the NUA to collaborate with the National Water Research Institute to develop a Lake Thunderbird PLOT; and
- 4. WHEREAS, new BOR policy no longer dictates that grant recipients execute the Assistance Agreement using their legally mandated contract approval process and instead now requires that the grant recipient indicate their acceptance of the Grant and terms and conditions of Assistance Agreement by commencing work on the funded project and commencing drawdowns of grant funds in accordance with terms and conditions of the Grant Agreement.

NOW, THEREFORE, BE IT RESOLVED BY THE NORMAN UTILITIES AUTHORITY:

SECTION 1. The NUA hereby finds that it is in the City of Norman's and public's interest in health, safety and welfare of the community to accept the grant funds made available under BOR Assistance Agreement R22AP00241 and to proceed with the Lake Thunderbird PLOT Project.

SECTION 2. The NUA understands and supports the acceptance of this Grant Award and finds:

- (a) The NUA has legal authority to collaborate with the National Water Research Institute on the Lake Thunderbird PLOT project as per the BOR Assistance Agreement
- (b) NUA has legal authority to drawdown grant funds allocated under the BOR Assistance Agreement with the understanding that such action indicates acceptance of the Assistance Agreement and all terms and conditions therein; and
- (c) The NUA is able to provide the minimum 50% non-federal cost share specified in the BOR Assistance Agreement.

<u>SECTION 3</u>. The NUA hereby authorizes and directs the City Manager or his designees, the Director of Utilities or his agents to:

- (a) Commence efforts on the Lake Thunderbird PLOT project in accordance with BOR Assistance Agreement No. R22AP00241;
- (b) Commence drawdown of funding provided under the Assistance Agreement, which as per current BOR policy, indicates acceptance of the Assistance Agreement and all terms and conditions therein; and
- (c) Represent the NUA in carrying out the NUA's responsibilities under the Assistance Agreement, including certifying disbursement requests on behalf of the NUA and compliance with applicable state and federal laws.

SECTION 4. The NUA will work with BOR to meet schedule milestones in the Assistance Agreement.

PASSED AND ADOPTED this 13th day of September, 2022.

Matthew Peacock, Vice-Chairman

ATTEST:

Brenda Hall, Secretary

File Attachments for Item:

9. CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION, AMENDMENT AND/OR POSTPONEMENT OF CONTRACT K-2223-113: A PROJECT AGREEMENT BY AND BETWEEN THE CITY OF NORMAN, OKLAHOMA, AND THE OKLAHOMA DEPARTMENT OF TRANSPORTATION FOR THE PHASE 10 PAVEMENT MARKINGS PROJECT, FEDERAL-AID PROJECT J3-6150(004)AG, JOB 36150(04) AND RESOLUTION R-2223-92.



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 03/14/2023

REQUESTER: Katherine Coffin

PRESENTER: Jami Short, Traffic Management Center Engineer

ITEM TITLE: CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION,

AMENDMENT AND/OR POSTPONEMENT OF CONTRACT K-2223-113: A PROJECT AGREEMENT BY AND BETWEEN THE CITY OF NORMAN, OKLAHOMA, AND THE OKLAHOMA DEPARTMENT OF TRANSPORTATION FOR THE PHASE 10 PAVEMENT MARKINGS PROJECT, FEDERAL-AID PROJECT J3-6150(004)AG, JOB 36150(04)

AND RESOLUTION R-2223-92.

BACKGROUND:

The 2016 – Fixing America's Surface Transportation (FAST) federal transportation funding bill allocates approximately \$21 Million in Federal funds per year for the implementation of eligible transportation improvements in the Oklahoma City metropolitan area. New traffic signals along federal functionally classified roads are eligible for 100% federal funding.

On February 23, 2021, City Council adopted resolution R-2021-91, which was later forwarded to both the Association of Central Oklahoma Governments (ACOG) and the Oklahoma Department of Transportation (ODOT) requesting federal funds to pay for 100% of the construction cost. In the resolution the City agreed to the terms and conditions of a federally funded project by stating its willingness to assume the responsibility for the preparation of engineering plans, the purchase of any additional right-of-way, the relocation of public utilities and funding of the local share of the construction cost, which is normally 20% but for this safety project will be 0%. In 2021, ACOG recommended to ODOT that the project be included in the FFY 2021-2024 Area Transportation Improvement Program [TIP], and was placed on the 2024 TIP list in 2022.

Preliminary plans for the Pavement Marking Installation Project (Phase 10) are nearing completion with the understanding that plans are progressing toward an early 2024 bid opening. The plans are being developed "in house" by the engineering staff in the Traffic Control Division. Construction is anticipated to begin in the spring of 2024 with completion of the work later that same year.

This project will provide durable centerlines, lane lines, crosswalks, stop bars, turn arrows, and other symbols on several miles of urban arterial roadways (see attached map). The estimated

construction cost of \$312,910 will be funded with 100% federal funds as a safety improvement project

DISCUSSION:

The Oklahoma Department of Transportation requires the City to execute a project agreement and to adopt it by resolution before letting the project to contract. The agreement addresses the responsibilities of the City and the Department during and after the construction of the project. The execution of three original documents is required. Both the resolution and agreement have been reviewed by staff and approved by the City Attorney.

RECOMMENDATION:

Staff recommends approval of Contract K-2223-113 and Resolution R-2223-92 with ODOT for the Pavement Marking Installation Project multiple locations along federal functionally roadways throughout the City (Phase 10).

STATE OF OKLAHOMA DEPARTMENT OF TRANSPORTATION PROJECT MAINTENANCE, FINANCING, AND RIGHT-OF-WAY AGREEMENT

CITY WIDE PAVEMENT STRIPING IN NORMAN

Project No.: J3-6150(004)AG

State Job No.: 36150(04)

This Agreement, made the day and year last written below, by and between the City of **Norman**, hereinafter referred to as the Sponsor, and the Department of Transportation of the State of Oklahoma, hereinafter referred to as the Department, for the following intents and purposes and subject to the following terms and conditions, to wit:

WITNESSETH

WHEREAS, The Sponsor requested that certain street improvements be approved by the Oklahoma Transportation Commission, as were previously programmed by the Sponsor and described as follows:

Project Type	Div.	County	JP No	Project No.	Work Type	Description
Pavement Marking	03	Cleveland	36150(04)	J3-6150(004)AG	STBG-UZA	CITY WIDE PAVEMENT MARKING IN NORMAN

WHEREAS, the Department is charged under the laws of the State of Oklahoma with construction and maintenance of State Highways; and,

WHEREAS, the Department is, by terms of agreements with the Federal Highway Administration, responsible for the management and construction of certain federally funded projects within the corporate limits of cities within the State of Oklahoma; and,

WHEREAS, the Sponsor has been identified as the beneficiary and sub-recipient of such federally funded project; and,

WHEREAS, receipt of the benefits of this project will require that the Sponsor assume certain financial responsibilities; and,

WHEREAS, the Sponsor is a municipal corporation created and existing under the constitution and laws of the State of Oklahoma; and

WHEREAS, the laws and constitution of the State of Oklahoma impose financial restrictions on the Sponsor and its ability to ensure financial obligations; and,

WHEREAS, the Parties hereto recognize those financial limitations and agree that the financial obligations assumed by the Sponsor, by the terms of this Agreement, are enforceable only to the extent as may be allowed by law or as may be determined by a court of competent jurisdiction; and,

WHEREAS, it is understood that, by virtue of the Article 10, Section 26 of the Oklahoma Constitution, the payment of Sponsor funds in the future will be limited to appropriations and available funds in the then current Sponsor fiscal year.

NOW, THEREFORE: the Department and the Sponsor, in consideration of the mutual covenants and stipulations as set forth herein, do mutually promise and agree as follows:

SECTION 1: PROJECT AGREEMENT

- 1.1 If applicable, the Department will recommend approval of the project by the Federal Highway Administration.
- 1.2 The Sponsor agrees to comply with Title VI of the Civil Rights Act of 1964, 78 Stat. § 252, 42 U.S.C. § 2000d et seq., and all requirements imposed by or pursuant to Title 49, Code of Federal Regulations, Part 21 "Nondiscrimination in federally assisted programs of the Department of Transportation effectuation of Title VI of the Civil Rights Act 1964".
- 1.3 The DEPARTMENT and SPONSOR mutually recognize that each party is a governmental entity subject to the provisions of the Governmental Tort Claims Act (51 O.S. § 151 et seq.). The DEPARTMENT and SPONSOR hereby mutually agree that each is and may be held severally liable for any and all claims, demands, and suits in law or equity, of any nature whatsoever, paying for damages or otherwise, arising from any negligent act or omission of any of their respective employees, agents or contractors which may occur during the prosecution or performance of this Agreement to the extent provided in the Governmental Tort Claims Act. Each party agrees to severally bear all costs of investigation and defense of claims arising under the Governmental Tort Claims Act and any judgments which may be rendered in such cause to the limits provided by law. Nothing in this section shall be interpreted or construed to waive any legal defense which may be available to a party or any exemption, limitation or exception which may be provided by the Governmental Tort Claims Act.

1.4 The Sponsor understands that should it fail to fulfill its responsibilities under this Agreement, such a failure will disqualify the Sponsor from future Federal-aid funding participation on any proposed project. Federal-aid funds are to be withheld until such a time as an engineering staff, satisfactory to the Department has been properly established and functioning, the deficiencies in regulations have been corrected or the improvements to be constructed under this Agreement are brought to a satisfactory condition of maintenance.

SECTION 2: ENGINEERING RESPONSIBILITIES

- 2.1 The Sponsor shall provide professional engineering services for the development of the Plans, Specifications and Estimates (PS&E) for this project. Design engineering for this project will be performed under the supervision of the Sponsor. Sponsor warrants to the Department that they will review the plans and will certify that the plans are acceptable to the Sponsor and are in full compliance with current standards and specifications.
- 2.2 Progress payments will be made to the consultant by the DEPARTMENT upon receipt of a properly executed claim form, approved by the SPONSOR, accompanied by suitable evidence of the completion of the work claimed, as detailed in the engineering contract.
- 2.3 The Department and Sponsor mutually recognize that each party is a governmental entity subject to the provisions of the Governmental Tort Claims Act (51 O.S. § 151 et seq.). The Department and Sponsor hereby mutually agree that each is and may be held severally liable for any and all claims, demands, and suits in law or equity, of any nature whatsoever, paying for damages or otherwise, arising from any negligent act or omission of any of their respective employees, agents or officers which may occur during the prosecution or performance of this Agreement to the extent provided in the Governmental Tort Claims Act. Each party agrees to severally bear all costs of investigation and defense of claims arising under the Governmental Tort Claims Act and any judgments which may be rendered in such cause to the limits provided by law. Nothing in this section shall be interpreted or construed to waive any legal defense which may be available to a party or any exemption, limitation or exception which may be provided by the Governmental Tort Claims Act.
- 2.4 The Sponsor agrees to the location of the subject project and agrees to adopt the final plans for said project as the official plans of the Sponsor for the streets, boulevards, arterial highways and/or other improvements contained therein; and further, the Sponsor affirmatively states that it has or shall fully and completely examine the

plans and shall hereby warrant to the Department, the Sponsor's complete satisfaction with these plans and the fitness of the plans to construct aforesaid project.

- 2.5 The Sponsor certifies that the project design plans shall comply, and the project when completed will comply, with the requirements of the Americans with Disabilities Act (ADA) of 1990 (42 U.S.C. §§ 12101 12213), 49 CFR Parts 27, 37 and 38 and 28 CFR parts 35 and 36. The Sponsor shall be exclusively responsible for integrated ADA compliance planning for all Sponsor streets, sidewalks and other facilities provided for public administration, use and accommodation, which is required of recipients and subrecipients by 49 CFR § 27.11. State highways continued through corporate limits of the Sponsor shall be included in the Sponsor's comprehensive compliance plans.
- 2.6 To the extent permitted by law, all data prepared under this Agreement shall be made available to the Department without restriction or limitation on their further use, with exception of any documents or information that would be considered attorney/client privileged by the Sponsor.
- 2.7 The Department will conduct the environmental studies and prepare the National Environmental Protection Act documents as required for federally funded projects.
- 2.8 The Department will forward the environmental documents to FHWA for approval if applicable.

SECTION 3: LAND ACQUISITION AND UTILITY RELOCATION

- 3.1 The Sponsor warrants to the Department that, they have or will acquire all land, property, or rights-of-way needed for complete implementation of said project, free and clear of all obstructions and encumbrances and in full accordance with the Department's guidelines for Right-of-Way Acquisition on Federal-Aid Projects, the Uniform Relocation Act, the National Environmental Protection Act and all other applicable local, state and federal regulations.
- 3.2 The Sponsor shall be responsible for ensuring all proper tax documentation is filed and issued to recipients of funds paid on behalf of the Sponsor for Right-of-Way acquisition for this project.
- 3.3 The Sponsor warrants to the Department that it is knowledgeable of and will comply with the provisions of 42 U.S.C.A., Section 4601-4655 and 23 U.S.C.A., Section 323 (as amended) and 49 C.F.R. Part 24 in the acquisition of all right-of-way and the relocation of any displacees.

- 3.4 The Sponsor shall remove, at its own expense, or cause the removal of, all encroachments on existing streets as shown on said plans, including all buildings, porches, fences, gasoline pumps, islands, and tanks, and any other such private installations and shall further remove or remediate any existing environmental contamination of soil and water from any source, known or unknown.
- 3.5 If the acquisition of right-of-way for this project causes the displacement of any person, business or non-profit organization, the Sponsor warrants it will provide and be responsible for the Relocation Assistance Program and all costs associated with the Relocation Assistance Program. The Department, upon request, will provide a list of service providers who have been prequalified to administer the Relocation Assistance Program. The Sponsor agrees to employ a service provider from the prequalified list provided by the Department. Prior to any relocation assistance payments to the Sponsor, all files with parcels requiring relocation assistance shall be submitted to the Department for audit and compliance review. The Sponsor shall notify the Department within seven (7) days of the date of an offer to acquire being provided to a property owner(s) on any parcel which will require relocation assistance. Written notifications regarding service providers, in-house personnel, appeals, offers to acquire or other related correspondence shall be properly addressed and remitted as follows:

Oklahoma Department of Transportation Local Government Division 200 N.E. 21st Street Oklahoma City, Oklahoma 73105-3204

- 3.6 The Sponsor warrants that any procurement, using federal funds, of property, goods or professional and personal services required for this project will be acquired by the Sponsor in compliance with the federal procurement Regulations at 40 USC 1101- 1104 (Brooks Act) and the Regulations for Administration of Engineering and Design Related Service Contracts at 23 C.F.R. Part 172, as well as provisions of State purchasing laws applicable to the Sponsor.
- 3.7 The Sponsor will certify to the Department prior to establishing a letting date that all existing utility facilities (if any) have been properly adjusted in full accordance with the Department's Right-of-Way and Utilities Division policies and procedures to accommodate the construction of said project; and will be solely responsible for payment of any and all contractor expenses, claims, suits and/or judgments directly resultant from any actual utility relocation delays.

- 3.8 The Sponsor shall have the authority pursuant to 69 O.S. § 1001 and 69 O.S. § 1004 to sell any lands, or interest therein, which were acquired for highway purposes as long as such sale is conducted in accordance with the above cited statutes.
- 3.9 The Sponsor agrees that if any property acquired utilizing Federal funding is disposed of or is no longer used in the public interest the Sponsor shall reimburse the Department at the current fair market value.
- 3.10 The Sponsor agrees to;
 - Transmit copies of the instruments, including all deeds and easements, to the Department prior to the advertisement of bids for construction.
 - Comply with the provisions of 42 U.S.C.A. § 4601-4655 and 23 U.S.C.A. § 323 (as amended) and, further comply with 49 C.F.R. Part 24 in the acquisition of all necessary right-of-way and relocation of all displacees.
 - Convey title to the State of Oklahoma on all tracts of land acquired in the name of the Sponsor if the project is located on the State Highway System.

SECTION 4: FUNDING SUMMARY

4.1 The Department and the Sponsor agree that the project will be financed at a **not-to-exceed**, STBG-UZA total estimated cost of **\$312,910**, as described below:

	FUNDING SOURCE =	ST	BG-UZA	Sponsor		
STATE JOB PIECE NO.	DESCRIPTION	TOTAL ESTIMATED COST	SHARE (%)	AMOUNT	SHARE (%)	AMOUNT
36150(04)	Construction - (With 6% Inspection)	\$312,910	100 up to a limit of	\$312,910	Remainder	\$0
	Total	\$312,910	Total=>	\$312,910	Total=>	\$0

4.2 Furthermore, the Department and the Sponsor agree that actual STBG-UZA costs incurred by project phases (JP 36150(04)) may exceed initial estimates. Costs between these project phases will be administratively adjusted based on actual cost of each phase, within the total cost of this Agreement, without formal supplemental Agreement, in so far as the total project agreement is not exceeded.

4.3 It is understood by the Sponsor and the Department that the funding participation stipulated herein may be altered due to bid prices, actual construction supervision costs and non-participating costs incurred during construction. The Sponsor will be responsible for payment of any estimated local funding prior to advertising the project for bid. Upon final acceptance of this project, the total project cost will be determined, and the final amount of local funds (if any) will be determined by the Department's Comptroller per the terms of this Agreement. A refund will then be made by the Department to the Sponsor or additional funding will be requested. The Sponsor agrees to make arrangements for payment of any Department invoice within 45 days of receipt.

SECTION 5: CONSTRUCTION RESPONSIBILITIES

- 5.1 The Sponsor agrees to comply with all applicable laws and regulations necessary to meet the Oklahoma Department of Environmental Quality (ODEQ) requirements for pollution prevention including discharges from storm water runoff during the planning and design of this project. Further, the Sponsor agrees and stipulates as stated in the ODEQ's General Permit OKR10, dated September 13, 2017 or latest revision, to secure a storm water permit with the ODEQ for utility relocations, when required. It is also agreed that the storm water management plan for the project previously described in the document includes project plans and specifications, required schedules for accomplishing the temporary and permanent erosion control work, the site specific storm water pollution prevention plan and the appropriate location map contained in the utility relocation plans.
- 5.2 The Sponsor's responsibility for environmental cleanup will be a continuing responsibility to remediate any and all known and unknown environmental damage throughout the duration of this agreement with the Department in compliance with State and federal regulations.
- 5.3 The roadway improvements and all devices specified herein shall not be altered, removed, or cease to be operative without mutual written consent of the Department and the Sponsor.
- 5.4 Upon approval of this agreement and the plans, specifications, and estimates by the Sponsor, the Department, and the Federal Highway Administration (if applicable), the Department will advertise and let the construction contract for this project in the usual and customary legal manner. It is agreed that the projects herein contemplated are proposed to be financed as previously described, and that this Agreement, all plans, specifications, estimate of costs, acceptance of work, payments, and procedure in general hereunder are subject in all things at all times to all local, state and federal laws, regulations, orders, approvals as may be applicable hereto.

- 5.5 The Department shall provide a copy of the executed construction contract to the Sponsor, upon receipt of a written request.
- 5.6 The Department will notify the Sponsor of pre-bid dates, bid opening dates, and Transportation Commission award dates in writing upon receipt of a written request.
- 5.7 The Sponsor agrees that prior to the Department's advertising of the project for bids (as to that part of the project lying within the present corporate limits) it will:
 - Grant to the Department and its contractors, the right-of-entry to all existing streets, alleys, and Sponsor owned property when required, and other rights-of- way shown on said plans.
 - Remove at its own expense, or cause the removal of, all encroachments on existing streets as shown on said plans, including all signs, buildings, porches, awnings, porticos, fences, gasoline pumps and islands, and any other such private installations.
 - Prohibit parking on that portion of the project within the corporate limits of the Sponsor, except as may be indicated in the plans or hereafter approved by agreement with the Department. The Sponsor further agrees not to install, or permit to be installed, any signs, signals or markings not in conformance with the standards approved by the Federal Highway Administration and Manual on Uniform Traffic Control Devices (MUTCD).
 - Comply with the Department's standards for construction of driveway entrances from private property to the highway, in accordance with the Department's manual entitled "Policy on Driveway Regulation for Oklahoma Highways", Rev. 5/96, 69 O.S. (2001) § 1210.
 - Maintain all right-of-way acquired for the construction of this project, as shown on said plans, in a manner consistent with applicable statutes, codes, ordinances and regulations of the Department and the State of Oklahoma.
 - Have the authority pursuant to 69 O.S. 2001 § 1001 and 69 O.S. 2001 § 1004 to sell any lands, or interest therein, which were acquired for highway purposes as long as such sale is conducted in accordance with the above cited statutes. Prior written approval by the Chief, Right-of-Way Division for the Department shall be required before any sale is made.

- 5.8 The Sponsor further agrees and warrants to the Department that, subsequent to the construction of said project, the Sponsor will:
 - Erect, maintain and operate traffic control devices, including signals, signs and pavement markings only in accordance with 47 O.S. 2011 §§ 15-104- 15-106, and subject to agreement of the Department:
 - a) In the event that any traffic signal installed hereunder is no longer needed for the purposes designated herein, then the traffic signal installed hereunder shall not be moved by the Sponsor to any other point other than that which is approved by the Department prior to such removal.
 - b) In the event there is no mutually agreed location for the reinstallation, the Sponsor will assume complete ownership of the equipment following removal, if the installation is ten (10) years old or older. If the installation is less than ten (10) years old and:
 - In the event the Sponsor desires total ownership of the equipment, the Sponsor shall reimburse the Department the original federal funding percentage share for the original equipment cost only, amortized for a ten(10) year service life, interest ignored, and assuming straight line depreciation.
 - 2) In the event the Sponsor does not desire total ownership of the equipment, the Sponsor shall sell the equipment at public auction to the highest bidder. The Sponsor shall reimburse the Department the original federal funding percentage share of the proceeds of such sale.
 - 2) Subject to agreement with the Department, regulate and control traffic on said project, including but not limited to, the speed of vehicles, parking, stopping and turns only in accordance with 47 O.S. 2011 §§ 15-104- 15-106, and to make no changes in the provisions thereof without the approval of the Department. It shall be the responsibility of the Sponsor to notify the Department of any changes necessary to ensure safety to the traveling public.
 - Maintain all drainage systems and facilities constructed, installed, modified or repaired in conjunction with this project or as may be otherwise necessary to ensure proper drainage for road surfaces constructed under the terms of this agreement.

- 4) Maintain all curbs and driveways abutting road surfaces constructed under the terms of this Agreement and all sidewalks adjacent thereto.
- 5) Maintain all right-of-way areas adjacent to road surfaces, including erosion control and periodic mowing of vegetation, in a manner consistent with applicable codes, ordinances and regulations.
- 6) For any portion of the project encompassed under this Agreement that is part of the State Highway System, the Sponsor shall maintain all that part of said project within the corporate limits of the Sponsor between the gutter lines and the rightof-way lines, and if no gutter exists, between the shoulder lines and the right-ofway lines, including storm sewers, all underground facilities, curbs and mowing, all in accordance with 69 O.S. Supp. 1994 §901 and all other applicable law.
- 7) On limited access highways where county roads or city streets extend over or under the highway or public roads are constructed on state rights-of-way but there is no immediate ingress and egress from the highway, responsibility shall be as follows:
 - a. The public roads as defined in OAC 730:35-1-2 shall be maintained by the city or county and shall be included in their roadway mileage inventory.
 - b. Where county roads or city streets extend over the highway, the roadway, approaches and bridge surfaces, including the deck, shall be maintained by the city or county. The approach guardrail, bridge structure, and highest clearance posting on the structure shall be maintained by the Department.
 - c. Where county roads or city streets extend under the highway, the roadway approaches and advance signing shall be maintained by the city or county. The Department shall maintain the approach guardrail, bridge structure and surface, and the height clearance posting on the structure.
- 5.9 The Sponsor further agrees and warrants to the Department concerning any sign and highway facility lighting included as part of this project:
 - The Sponsor will, upon notice from the Department Engineer, provide at its own expense all required electrical energy necessary for all preliminary and operational tests of the highway lighting facilities.

- 2) Upon completion of the construction of said project, the Sponsor will be responsible for the maintenance and cost of operation of these highway lighting facilities, including all appurtenances thereto and including the sign lighting facilities.
- 3) It is specifically understood and agreed that the highway lighting and sign lighting facilities specified hereunder shall be continuously operated during the hours of darkness, between sunset and sunrise, and shall not be altered, removed or be allowed to cease operation without the mutual written consent of the Department and the Sponsor.
- 4) The Sponsor agrees to provide, on a periodic schedule, an inspection, cleaning and re-lamping maintenance program to assure the maximum efficiency of the highway lighting facilities.
- 5) In the event that the highway lighting facilities installed hereunder are no longer needed for the purposes designated herein, then the highway lighting facilities installed hereunder shall not be moved by the Sponsor to any point other than which is approved by the Department prior to such removal.
- 6) In the event there is no mutually agreed location for reinstallation, the Sponsor will assume complete ownership of the equipment following removal if the installation is twenty (20) years old or older. If the installation is less than twenty years old and:
 - a) In the event the Sponsor desires total ownership of the equipment, the Sponsor shall reimburse the Department the original federal funding percentage share of the original equipment costs only, amortized for a twenty
 (20) year service life, interest ignored, and assuming straight line depreciation.
 - b) In the event the Sponsor does not desire total ownership of the equipment, the Sponsor shall sell the equipment at public auction to the highest bidder. The Sponsor shall reimburse the Department the original federal funding percentage share of the proceeds of such sale.
- 5.10 The Department will appoint competent supervision and inspection of the construction work performed by the construction contractor and will provide such engineering, inspection and testing services as may be required to ensure that the construction of the project is accomplished in accordance with the approved Plans,

Specifications and Estimates. The Department reserves the right to make such changes in said plans as may be necessary for the proper construction of said project.

- 1) The Sponsor agrees to provide such competent supervision as the Sponsor deems necessary during times that the work is in progress to ensure the completion of the project to the Sponsor's satisfaction and the Sponsor's representatives and the Department's representatives will cooperate fully to the end of obtaining work strictly in accordance with the plans and specifications.
- 2) The Sponsor will make ample provisions annually for the proper maintenance of said project, including the provision of competent personnel and adequate equipment, specifically, to provide all required maintenance of the project during the critical period immediately following construction and to keep the facility in good and safe condition for the benefit of the traveling public.
- 3) The Sponsor warrants to the Department that it will periodically review the adequacy of the aforesaid project to ensure the safety of the traveling public and should the Sponsor determine that further modifications or improvements be required, the Sponsor shall take such actions as are necessary to make such modifications or improvement. When operation modifications are required which in the opinion of the Department exceed the capability of the Sponsor's staff, the Sponsor agrees to retain, at the sole expense of the Sponsor, competent personnel for the purpose of bringing the improvement up to the proper standard of operation.
- 4) The Sponsor warrants and agrees that upon completion of the aforesaid project, the Sponsor assumes any and all financial obligations for the operation, use, and maintenance of the aforesaid project.

SECTION 6: NON-DISCRIMINATION CLAUSE

1. During the performance of this agreement, the Sponsor, for itself, its assignees and successors in interest, agrees as follows:

1) Compliance with Regulations:

The Sponsor shall comply with the regulations relative to nondiscrimination in federally-assisted programs of the Department of Transportation, Title 49, Code of Federal Regulations, Part 21, as they may be amended from time to time (hereinafter referred to as the Regulations), which are herein incorporated by reference and made a part of this agreement.

2) Nondiscrimination:

The Sponsor, with regard to the work performed by it during the agreement, shall not discriminate on the grounds of race, color, sex, age, national origin, disability/handicap, or income status, in the selection and retention of contractors or subcontractors, including procurements of materials and leases of equipment. The Sponsor shall not participate either directly or indirectly, in the discrimination prohibited by Section 21.5 of the Regulations, including employment practices when the contract covers a program set forth in appendix B of the Regulations.

3) <u>Solicitations for Subcontracts, Including Procurement of Materials and</u> Equipment:

In all solicitations, either by competitive bidding or negotiation, made by the Sponsor for work to be performed under a contract or subcontract, including procurements of materials or leases of equipment, each potential contractor or subcontractor or supplier shall be notified by the Sponsor of the Sponsor's obligations under this agreement and the Regulations relative to nondiscrimination on the grounds of race, color, sex, age, national origin, disability/handicap, or income status.

4) Information and Reports:

The Sponsor shall provide all information and reports required by the Regulations, or directives issued pursuant thereto, and shall permit access to its books, records, accounts, other sources of information and its facilities as may be determined by the State Department of Transportation or the Federal Highway Administration to be pertinent to ascertain compliance with such Regulations or directives. Where any information required of a Sponsor is in the exclusive possession of another who fails or refuses to furnish this information, the Sponsor shall so certify to the State Department of Transportation, or the Federal Highway Administration, as appropriate, and shall set forth what efforts it has made to obtain the information.

5) Sanctions for Noncompliance:

In the event of the Sponsor's noncompliance with the nondiscrimination provisions of this agreement, the State Department of Transportation shall impose such contract sanctions as it or the Federal Highway Administration may determine to be appropriate, including but not limited to:

- a. Withholding of payments to the Sponsor under the agreement until the Sponsor complies and/or
- b. Cancellation, termination, or suspension of the agreement in whole or in part.

6) Incorporation of Provisions:

The Sponsor shall include the provisions of sub paragraphs 1) through 5) in every contract or subcontract, including procurements of materials and leases of equipment, unless exempt by the Regulations or directives issued pursuant thereto. The Sponsor shall take such action with respect to any contract or subcontract or procurement as the State Department of Transportation or the Federal Highway Administration may direct as a means of enforcing such provisions, including sanctions for noncompliance provided, however, that in the event a Sponsor becomes involved in, or is threatened with, litigation by a subcontractor or supplier as a result of such direction, the Sponsor may request the State Department of Transportation to enter into such litigation to protect the interests of the State; and, in addition, the Sponsor may request the United States to enter into such litigation to protect the interests of the United States.

SECTION 7: TERMINATION

- 7.1 This Agreement may be terminated by any of the following conditions:
 - a) By mutual agreement and consent, in writing of both parties.
 - b) By the Department by written notice to the Sponsor as a consequence of failure by the Sponsor to perform the services set forth herein in a satisfactory manner.
 - c) By either party, upon the failure of the other party to fulfill its obligations as set forth herein.
 - d) By the Department for reasons of its own and not subject to the mutual consent of the Sponsor upon five (5) days written notice to the Sponsor.
 - e) By satisfactory completion of all services and obligations described herein.
- 7.2 The termination of this Agreement shall extinguish all rights, duties, obligations and liabilities of the Department and the Sponsor under this agreement. If the potential termination of this Agreement is due to the failure of either the Department or the Sponsor to fulfill their obligation as set forth herein, the non-breaching party will notify the party alleged to be in breach that possible breach of agreement has occurred. The party alleged to be in breach should make a good faith effort to remedy that breach as outlined by non-breaching party within a period mutually agreed by each party in writing.

SECTION 8: GOVERNING LAW AND VENUE

8.1 Any claims, disputes or litigation relating to the solicitation, execution, interpretation, performance, or enforcement of this Agreement shall be governed by the laws of the State of Oklahoma and the applicable rules, regulations, policies and procedures of the Oklahoma Transportation Commission. Venue for any action, claim, dispute or litigation, mediation or arbitration shall be in Oklahoma County, Oklahoma.

SECTION 9: DISPUTE RESOLUTION

9.1 The parties hereto have entered into this agreement in the State of Oklahoma and the laws of the State of Oklahoma shall apply. The parties agree to bargain in good faith in direct negotiation to achieve resolutions of any dispute and, if such efforts are unsuccessful, to retain a neutral mediation service to mediate the dispute prior to the filing of any court action. Mediation shall be conducted in the Oklahoma City area and the costs of such mediation shall be borne equally by the parties. If mediation is not successful, venue for any action brought to enforce the terms of this agreement shall be in Oklahoma County, State of Oklahoma. Each party shall bear any cost and attorney fees incurred by the party in such litigation.

SECTION 10: PRIOR UNDERSTANDINGS

10.1 This agreement incorporates and reduces to writing all prior understandings, promises, agreements, commitments, covenants or conditions and constitutes the full and complete understanding and contractual relationship of the parties.

SECTION 11: AMENDMENTS OR MODIFICATIONS OF AGREEMENT

11.1 No changes, revisions, amendments or alterations in the manner, scope of type of work or compensation to be paid by the DEPARTMENT shall be effective unless reduced to writing and executed by the parties with the same formalities as are observed in the execution of this Agreement.

SECTION 12: RECORDS

12.1 The Sponsor is to maintain all books, documents, papers, accounting records and other evidence pertaining to costs incurred and to make such materials available at its respective offices at all reasonable times, during the agreement period and for three (3) years from the date of final payment under the agreement for inspection by the DEPARTMENT and the State Auditor and Inspector, and copies thereof shall be furnished to the DEPARTMENT, if requested.

SECTION 13: HEADINGS

13.1 Article headings used in this Agreement are inserted for convenience of reference only and shall not be deemed a part of this agreement for any purpose.

SECTION 14: BINDING EFFECTS

14.1 This Agreement shall be binding upon and inure to the benefit of the ODOT and the Sponsor and shall be binding upon their successors and assigns subject to the limitations of Oklahoma law.

SECTION 15: SEVERABILITY

15.1 If any provision, clause or paragraph of this Agreement or any document incorporated by reference shall be determined invalid by a court of competent jurisdiction, such determination shall not affect the other provisions, clauses or paragraphs of this Agreement which are not affected by the determination. The provisions, clauses or paragraphs of this Agreement and any documents incorporated by reference are declared severable.

SECTION 16: EFFECTIVE DATE

16.1 This Agreement shall become effective on the date of execution by the Department's Director or his designee.

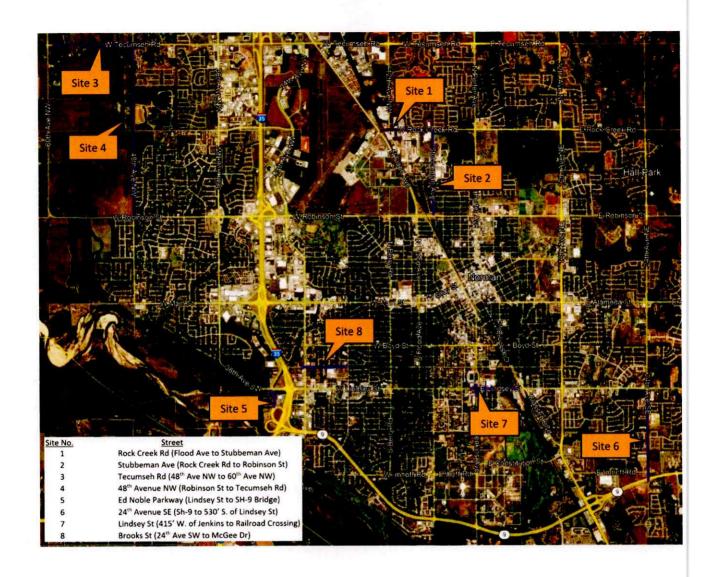
authority vested in him by	the State Tra epartment of	ansportat Transpo	e Department of Transportation, pursion Commission, has hereunto subscritation and the Sponsor has executed Sponsor.	ribed his
The Sponsor, Department on the	on this _ day of	of	, 20,	and the
			OF NORMAN	
APPROVED AS TO FOR				
ByCity Attorney			By Mayor	
ByAttest: City Clerk			(SEAL): Approved – THE CITY O	F NORMAN
			OKLAHOMA TRANSPORTATION	
	Rec	ommend	ed for Approval	
Local Government Division	on Engineer	Date	Director of Project Delivery	Date
APPROVED AS TO FOR AND LEGALITY	M		APPROVED	
General Counsel		Date	Deputy Director	Date

RESOLUTION NO. R-2223-92

BE IT RESOLVED BY THE MAYOR AND COUNCIL OF THE CITY OF NORMAN, OKLAHOMA:

THAT, WHERAS it is in the best interest of the City of Norman, Oklahoma, to execute that certain Project Agreement for Federal-aid Project No. J3-6150(004)AG, State Job Number 36150(04), by and between the City of Norman and the Oklahoma Department of Transportation;

NOW, THEREFORE, it is hereby r	resolved that the Mayor is hereby authoriz	ed and
directed to execute the above described aga	reement on behalf of the City of Norman,	and duly
signed by the Mayor on this day of _	, 2023.	
	CITY OF NORMAN	
	Mayor	
ATTEST:		
City Clerk		
Approved as to form and legality this	day of,	2023.
	City Attorney	



Location Map Pavement Marking – Phase 10



File Attachments for Item:

10. CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF CONTRACT K-223-129: A CONTRACT BY AND BETWEEN THE CITY OF NORMAN, OKLAHOMA, AND CLARITY TELECOM, L.L.C., D/B/A BLUEPEAK FIBER FOR A NON EXCLUSIVE AGREEMENT TO PROVIDE CABLE SERVICES AND CABLE SYSTEM IN THE CITY OF NORMAN



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 3/14/2023

REQUESTER:

PRESENTER: Heather Poole, Assistant City Attorney

ITEM TITLE: CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION,

AMENDMENT, AND/OR POSTPONEMENT OF CONTRACT K-2223-129: A CONTRACT BY AND BETWEEN THE CITY OF NORMAN, OKLAHOMA, AND CLARITY TELECOM, L.L.C., D/B/A BLUEPEAK FIBER FOR A NON EXCLUSIVE AGREEMENT TO PROVIDE CABLE SERVICES AND CABLE

SYSTEM IN THE CITY OF NORMAN

BACKGROUND:

Bluepeak has proposed an agreement between the City and Clarity Telecom, LLC d/b/a Bluepeak regarding extending their cable service into the City of Norman. Bluepeak would not replace Norman's other cable franchises, but instead would be competing with them under this agreement. This agreement would allow access to the public right-of-ways for cable services. The proposal from Bluepeak was discussed with Council on December 6, 2022.

DISCUSSION:

Under Oklahoma law, cable television providers are required to negotiate access to public rights of way on a city-by-city basis. This is done through agreements with cable television providers.

Bluepeak will be providing a cable television service under 11 O.S. §22-107.1, and the City can require adequate assurance that they will provide adequate public, education, and government ("PEG") access channel capacity. Furthermore, the City's agreement with Bluepeak would be forbidden from containing terms more favorable or less burdensome than our franchise agreement with other cable providers.

A 2006 Federal Communications Commission (the "FCC") Order (FCC 06-180) dealing with the implementation of Section 621(a)(1) of the Cable Communications Policy Act of 1984 (codified at 47 U.S.C. §541(a)(1)) stated that a franchising authority may award one or more franchises in its jurisdiction, but must not refuse to grant an additional competitive franchise unreasonably. The Order identified five areas that the FCC feels that local franchising authorities (municipalities) use to unreasonably prevent a competitive franchise from entering the market. Those areas are: (1) time for franchise negotiations, (2) build-out requirements, (3) franchise fees, (4) PEG network requirements, and (5) regulation of mixed-use networks. Without elaborating on the many details of this Order, the tone of the FCC continues to be very pro-

competition and critical of municipalities whose actions may potentially stifle competition in the cable television market.

Bluepeak approached the City of Norman with an agreement similar to what was presented and agreed to in Stillwater. Under the terms of the proposal, Bluepeak commits to paying the City of Norman a fee equal to 5% of the gross revenues of Bluepeak and its affiliates collected from each subscriber to their cable services product. This fee is identical to what the other cable services in Norman currently pay as a franchise fee.

In this Agreement, Bluepeak further agrees to provide four "streams" or "channels" of educational and governmental programming as long as the format is compatible with Bluepeak's technology. The term of the agreement is five (5) years, with the potential for renewal, modification, and/or extension of the agreement.

RECOMMENDATION:

Approval of the attached contract will protect the City's right of way fee and public access interests for the term of the contract. The framework of this agreement provides for the City, by agreement, the same PEG access and the same 5% fee in lieu of franchise fees to the City of Norman as are now provided under the current cable franchise agreements.

CABLE TELEVISION AGREEMENT

This Cable Television Agreement ("Agreement") is made and entered into this _____day of _____, 2023, by and between the City of Norman, OK, a municipal corporation, hereinafter referred to as the "City," and Clarity Telecom, LLC, d/b/a Bluepeak Fiber, hereinafter referred to as "Clarity" or "Company," with Clarity and City sometimes separately referred to hereinafter as a "party," and sometimes collectively as "parties."

WHEREAS, the City's role as manager of public rights-of-way and easements and as a regulator of cable service requires it to maintain a fair and level playing field for all such service providers; and

WHEREAS, City and Clarity have determined that it is in the best interest of all parties, including the citizens of City, that Clarity be granted the right to construct and operate a cable system to provide cable services within the City; and

WHEREAS, the City Council of Norman has relied on Clarity's representations and has considered all information presented to it by Clarity, by City staff, and the public, and has determined that Clarity has the technical, legal and financial ability to construct and operate a cable system and to provide cable services; and

WHEREAS, based upon such representations, the City Council of Norman has determined to grant Clarity a non-exclusive permit to construct, install, maintain and operate a cable system in the City, subject to the terms and conditions set forth herein and applicable federal, state, and municipal statutes, regulations and ordinances, is consistent with the public interest.

NOW, THEREFORE, in consideration of the mutual covenants, promises and agreements hereinafter set forth, the parties agree as follows:

- 1. <u>Term of Agreement</u>: This non-exclusive Agreement shall take effect the last date of signature below by the City and by Clarity and shall be effective for a term of five (5) years thereafter. Prior to the end of this term, the parties agree to enter into good faith negotiations regarding a possible renewal and/or modification and/or extension of this Agreement, subject to Clarity's right to commence renewal proceedings under Applicable Law.
- 2. Definitions. The following words, terms and phrases, when used in this Agreement, shall have the meanings ascribed to them in this section:
 - (A) "Applicable Law" means all federal, state and local statutues, laws, rules, regulations, ordinances and similar governmental requirements applicable to all similarly situated parties on an equal and non-discriminatory basis.
 - (B) "Cable Service" shall have the same meaning as contained in federal statutes, 47 U.S.C. \$522(6) on the effective date of this Agreement.
 - (C) "Cable System" shall have the same meaning as contained in federal statutes, 47 U.S.C. §522(7) on the effective date of this Agreement.

Item 10.

(D) "Public Way" means the surface of, and the space above and below, any public street, highway, freeway, bridge, land path, alley, court, boulevard, sidewalk, parkway, way, lane, public way, drive, circle, or other public right-of-way, including, but not limited to, public utility easements, dedicated utility strips, or rights-of-way dedicated for compatible uses and any temporary or permanent fixtures or improvements located thereon now or hereafter held by City which shall entitle City and Clarity to the use thereof for the purpose of installing, operating, repairing, and maintaining the Cable System. "Public Way" also means any easement now or hereafter held by City for the purpose of public travel, or for utility or public service use dedicated for compatible uses, and shall include other easements or rights-of-way as shall within their proper use and meaning entitle City and Clarity to the use thereof for the purposes of installing Clarity's Cable System or transmitting Clarity's Cable Service over poles, wires, cables, conductors, ducts, conduits, vaults, manholes, pedestals, amplifiers, appliances, attachments, and other related property or equipment as may be necessary or appurtenant to the Cable System.

3. <u>Nature of Agreement:</u>

- (A) No privilege or exemption shall be granted or conferred by this Agreement except those specifically prescribed herein.
- (B) Any right or power in, or duty impressed upon, any officer, employee, department, or board of the City by this Agreement shall be subject to transfer by the City to any other legally authorized officer, employee, department, or board of the City.
- (C) This Agreement shall not relieve Clarity of any existing obligations involved in obtaining permits, pole or conduit space from any department of the City, utility company, or from others maintaining utilities in streets.
- (D) This Agreement may not be sold, transferred, leased, assigned or disposed of (except to an affiliate of Clarity or as a result of a merger or other business combination where Clarity is the surviving entity), including but not limited to, by forced or voluntary sale, merger, consolidation, receivership or other means without the prior written consent of the City, and then only under such reasonable conditions as the City may establish under Applicable Law. Such consent as required by the City shall not, however, be unreasonably conditioned, withheld, or delayed. Notwithstanding the foregoing, this Section shall not prevent the assignment or hypothecation of the Agreement by Clarity as security for debt without such approval.
- (E) Clarity represents that it will construct a "Cable System" to provide Cable Service which Cable System shall consist of a set of closed transmission paths and associated signal generation, reception, and control equipment or other equipment that is designed to provide Cable Service to subscribers. This Agreement shall not apply to any service Clarity provides that is not a "Cable Service". Clarity will comply with all local and federal laws regarding Cable System, including the FCC technical standards set out in Subpart K of 47 C.F. R. Part 76.

- (F) If City enters into or has entered into an arrangement of any kind with any person or entity other than Clarity to enter into the Public Ways for the purpose of constructing or operating a Cable System or providing Cable Service or video service to any part of the City, the City and Clarity will comply with the provisions of applicable federal laws and FCC orders related to additional cable agreements. Except as specifically provided in this paragraph, neither City nor Clarity shall be permitted to take any unilateral action that materially changes the explicit mutual promises and covenants contained in this Agreement, and any changes, modifications or amendments to this Agreement must be made in writing, signed by City and Clarity.
- (G) If either party is not in compliance with the terms of the Agreement, after written notice is provided by the non-breaching party, the offending party has forty-five (45) calendar days to cure the breach, and in the event that any particular breach cannot be reasonably cured within such a period, provided the party in breach is exerting good faith efforts to cure the breach, the period shall toll for so long as such efforts continue in good faith at the approval of the non-breaching Party. No cure period shall be permitted if a party to this Agreement is found to have already materially breached this Agreement three (3) times during any calendar year. In the event a party to this Agreement is in breach and such breach is not cured within the cure period set out above, the non-breaching party may require the breaching party to pay reasonable expenses to cure the breach by providing no less than ninety (90) calendar days prior written notice of request for payment to the breaching party.

4. <u>Obligations of Clarity</u>:

- (A) During the term of this Agreement, Clarity shall pay to City a fee equal to 5% of the gross collected revenues of Clarity and its affiliates from the provision of Cable Service within the City. This fee may be identified and passed through on any subscriber bill by Clarity to the extent not prohibited by Applicable Law, and all such fees collected will be forwarded to City quarterly and shall be due forty-five (45) days after the end of each calendar quarter.
- (B) For purposes of this Agreement, gross collected revenues means any amounts in whatever form and from any source, directly or indirectly earned or derived by Clarity or any affiliate from the operation of the Cable System to provide Cable Service within the City. The fee shall not apply to Internet access or telephone or voice services offered by Clarity. Nothing in this Agreement shall be construed to prohibit the City from separately imposing any fees on these services to the extent permitted by applicable law.
- (C) During the performance of this Agreement, Clarity shall maintain the following insurance:
 - a) General Liability Insurance, with a limit of \$1,000,000 per occurrence and \$2,000,000 annual aggregate.
 - b) Automobile Liability Insurance, with a combined single limit of \$1,000,000 for each person and \$1,000,000 for each accident.
 - c) Workers' Compensation Insurance in accordance with statutory requirements and Employers' Liability Insurance, with a limit of \$500,000 for each occurrence.

- d) Professional Liability Insurance, with a limit of \$1,000,000 per claim and annual aggregate.
- e) Clarity shall, upon written request, furnish City with certificates of insurance which shall include a provision that such insurance shall not be canceled without at least thirty days' written notice to City. City shall require all Project contractors to include City, Clarity, and its parent company, affiliated and subsidiary entities, directors, officers and employees, as additional insureds on their General and Automobile Liability insurance policies, and to indemnify both City and Clarity, each to the same extent.
- (D) Upon reasonable prior notice, Clarity will grant the City the right to conduct reasonable audits of Clarity's books and records during normal business hours, on a nondisruptive basis, as are reasonably necessary to monitor compliance with the Agreement. City agrees to treat any information disclosed to it by Clarity as confidential, to the extent not prohibited by Applicable Law, and to disclose it only to employees, representatives, and agents of City that have a need to know, or in order to enforce the provisions hereof.
- (E) Clarity and City agree that the Fee for Cable Services shall be in lieu of all other concessions, charges, excises, franchise, license, privilege, permit fees, taxes, or assessments *except* sales taxes, personal or real property taxes, and ad valorem taxes that are payable outside of this Agreement.
- (F) During the term of this Agreement, Clarity shall provide capacity for four (4) "streams" or "channels" of noncommercial educational and governmental programming through Clarity's cable and/video service for the use of City, Norman Public Schools, the University of Oklahoma, and other educational institutions designated by the City. All programming shall be provided by the City or educational entities in a format compatible with Clarity's technology. Clarity shall not be required to share video programming with any other video service provider authorized to do business in the City.
- (G) Clarity shall comply with the federal Emergency Alert System regulations (47 C.F.R. Part 11).
- (H) The parties agree to consult in the event that, after execution of this Agreement, any court, agency, commission, legislative body, or other authority of competent jurisdiction issues a finding that limits the validity or enforceability of this Agreement, in whole or in part. Should the finding be final, non-appealable and binding upon either City or Company, this Agreement shall be deemed modified or limited to the extent necessary to address the subject of the finding. Where the effect of a finding is a modification, the parties shall enter into good faith negotiations to modify this Agreement in the manner which best effectuates its overall purposes and the original intentions of the parties.
- (I) No user of the Cable System who lawfully receives Cable Service with Clarity's express permission, shall be refused service arbitrarily. If such residence is located within 125 feet of Clarity's feeder cable, the Cable Service will be provided at Clarity's

published rate for standard installations. However, if the subscriber is located in an area where there would not be at least 40 residences per linear stand mile of cable as measured from Clarity's closest commercially reasonable tie-in point that is actively delivering Cable Service as of the date of such request for service, or if such residence is located farther than 125 feet from Clarity's nearest feeder cable, then Clarity shall only be required to extend the Cable System to subscribers in that area if the subscribers are willing to pay the capital costs of extending the Cable System. Clarity may require that such subscribers pay the capital contribution for construction in advance. Subscribers also shall be responsible for any standard/non-standard installation charges to extend the Cable System from the tap to the residence. Cable Service offered to Subscribers pursuant to this Article shall be conditioned upon Clarity having legal access to any such Subscriber's dwelling unit or other units wherein such Cable Service is provided. Nothing herein shall be construed to limit Clarity's ability to offer or provide bulk rate discounts or promotions.

- (J) All transmission and distribution structures, poles, other lines, and equipment installed or erected by Clarity pursuant to the terms hereof shall be located so as to cause a minimum of interference with the proper use of Public Ways and with the rights and reasonable convenience of property owners who own property that adjoins any of such Public Ways. Clarity shall comply with all right of way and easement management ordinances and/or regulations enacted by City, including such ordinances and/or regulations enacted after the effective date of this Agreement.
- (K) If during the course of Clarity's construction, operation, or maintenance of the Cable System, there occurs a disturbance of any Public Way by Clarity, it shall, at its expense, replace and restore such Public Way to a condition reasonably comparable to the condition of the Public Way existing immediately prior to such disturbance.
- (L) Subject to the City making a reasonable alternative pathway available to Clarity for such relocation (including in terms of cost and technical feasibility), and upon its receipt of reasonable advance notice, Clarity shall, at its own expense, protect, support, temporarily disconnect, relocate in the Public Way, or remove from the Public Way, any property of Clarity when lawfully required by City by reason of traffic conditions, public safety, street abandonment, freeway and street construction, change or establishment of street grade, installation of sewers, drains, gas or water pipes, or any other type of structures or improvements by City. If public funds are available to any company using such street, easement, or right of way for the purpose of defraying the cost of any of the foregoing, such funds shall also be made available to Clarity.
- (M) Clarity shall, on the request of any person or entity holding a building or other stucture moving permit issued by City, temporarily raise or lower its wires to permit the moving of such building or other structure, provided: i) the expense of such temporary raising or lowering of wires is paid by such person or entity, including, if required by Clarity, making such payment in advance: and ii) Clarity is given not fewer than ten (10) business days' advance written notice to arrange for such temporary wire changes.
- (N) Clarity shall have the authority to trim trees or other natural growth overhanging any of its Cable System in the City so as to prevent branches from coming in contact with

Clarity wires, cables, or other equipment. Clarity shall comply with reasonable standards for trimming put in place by the City's forester, and limited to the minimum required for adequate clearance.

- (O) Construction, installation, and maintenance of the Cable System shall be performed in an orderly and workmanlike manner. All such work shall be performed in substantial accordance with applicable FCC or other federal, state, and local regulations. The Cable System shall not unreasonably endanger or interfere with the safety of persons or property in the City.
- In those areas of the City where all of the transmission or distribution facilities of the respective public utilities providing telephone communications and electric services are underground, Clarity likewise shall construct, operate, and maintain all of its transmission and distribution facilities underground; provided that such facilities are actually capable of receiving Clarity's cable and other equipment without technical degradation of the Cable System's signal quality. In those areas of the City where the transmission or distribution facilities of the respective public utilities providing telephone communications and electric services are both aerial and underground, Clarity shall attempt to construct, operate, and maintain all of its transmission and distribution facilities underground where commercially reasonable. Nothing contained in this paragraph shall require Clarity to construct, operate, and maintain underground any ground-mounted appurtenances such as subscriber taps, line extenders, system passive devices (splitters, directional couplers), amplifiers, power supplies, pedestals, or other related equipment. Notwithstanding anything to the contrary contained in this paragraph, in the event that all of the transmissions or distribution facilities of the respective public utilities providing telephone communications and electric services are placed underground after the effective date of this Agreement, Clarity shall only be required to construct, operate, and maintain all of its transmission and distribution facilities underground if it is given reasonable notice and access to the public utilities' facilities at the time that such are placed underground.
- 5. Obligations of City. City will not attempt to nor subject the provision of Clarity's Cable Service to regulation under any provision of the City's cable television or broadband telecommunications franchise ordinance or similar ordinance(s) that are inconsistent with or more burdensome than those contained herein. In addition:
 - (A) City agrees to subject the construction and installation of the facilities that will be used in whole or in part to provide Clarity's Cable Service to the same process and review as it subjects the installation and construction of traditional telecommunications infrastructure:
 - (B) City agrees not to unreasonably block, restrict, or limit the construction and installation of facilities that will be used in whole or in part to provide Clarity's Cable Service;
 - (C) City agrees to process any and all applicable permits for the installation, construction, maintenance, repair, removal, and other activities associated with placement of communications or transmission facilities of any kind in a timely and prompt manner; and

- (D) City hereby grants to Clarity the nonexclusive right to construct and operate a Cable System and offer Cable Service and other service in, along, among, upon, across, above, over, under, or in any manner connected with Public Ways and for that purpose to erect, install, construct, repair, replace, reconstruct, maintain, or retain in, on, over, under, upon, across, or along any Public Way and all extensions thereof and additions thereto, such poles, wires, cables, conductors, ducts, conduits, vaults, manholes, pedestals, amplifiers, appliances, attachments, and other related property or equipment as may be necessary or appurtenant to the Cable System. Nothing in this Agreement shall be construed to prohibit Clarity from offering any service over its Cable System that is not prohibited by Applicable Law.
- 6. Modification. This Agreement may be amended or modified only by a written instrument executed by both Parties.
- 7. Entire Agreement. This Agreement constitutes the entire agreement between City and Clarity with respect to the subject matter contained herein and supersedes all prior or contemporaneous discussions, agreements, and/or representations of or between City and Clarity regarding the subject matter hereof.
- 8. Waiver. Failure on the part of either Party to enforce any provision of this Agreement shall not be construed as a waiver of the right to compel enforcement of such provision or any other provision.

9. Miscellaneous.

- (A) Clarity and City each hereby represents and warrants that it has the requisite power and authority to enter into this Agreement and to perform according to the terms hereof.
- The headings used in this Agreement are inserted for convenience or reference only and are not intended to define, limit or affect the interpretation of any term or provision hereof. The singular shall include the plural; the masculine gender shall include the feminine and neutral gender.
- (C) Nothing contained in this Agreement is intended or shall be construed as creating or conferring any rights, benefits or remedies upon, or creating any obligations of the Parties hereto toward any person or entity not a party to this Agreement, unless otherwise expressly set forth herein.
- (D) This Agreement shall not be exclusive, and the City expressly reserves the right to enter into similar agreements with any other company offering the same or similar video services at any time.
- (E) The geographic area covered by this Agreement shall be the incorporated limits of the City of Norman, Oklahoma, as such area now exists or may be modified in the future by annexation or deannexation.

- (F) The parties agree that either Cleveland County District Court (21st Judicial District) or the United States District Court for the Western District of Oklahoma shall be the sole and exclusive forum for any judiciable disputes concerning this Agreement.
- 10. <u>Binding Effect</u>. This Agreement shall be binding upon and for the benefit of each of the Parties and their respective principals, managers, City Council members, offices, directors, shareholders, agents, employees, attorneys, successors and assigns and any parents, subsidiaries or affiliated corporations or entities, as applicable.
- 11. <u>Employment Requirements</u>. Clarity shall afford equal opportunity in employment to all qualified persons as required by Applicable Law. No person shall be discriminated against in employment because of race, color, sex, religion, gender, national origin, age, familial status or disability in violation of Applicable Law.
- 12. <u>Notices.</u> Unless otherwise provided by Applicable Law, all notices or approvals pursuant to this Agreement shall be in writing and shall be deemed to be sufficiently given upon delivery to the address set forth below by U.S. certified mail, return receipt requested, or by nationally or internationally recognized courier service (such as Federal Express). If questioned, the party sending a notice shall have the burden to prove receipt or rejection. Rejected notices shall be deemed delivered. The parties may designate such other address or addresses from time to time by giving notice to the other in the manner provided for in this section.

To City: City Clerk

City of Norman

201 West Gray, P.O. Box 370 Norman, Oklahoma 73070

Copy to: Kathryn.Walker@normanok.gov

To Clarity/Bluepeak: Bluepeak Fiber

4600 S. Ulster Street, Suite 1300

Denver, CO 80237 Attn: Legal Notices

Copy to: <u>compliance.team@mybluepeak.com</u>

IN WITNESS WHEREOF, the parties hereto, by their duly authorized representatives, have executed this Agreement as of the dates set forth below.

City:		
APPROVED by the City Cou	uncil of The City of Norman, Okla	ahoma, on the day of
, 2023.		
	MAYOR	
ATTEST:		
City Clerk	-	
REVIEWED as to form and le	egality this day of	, 2023.
	City Attorney	
Clarity Telecom, LLC:		
Signature:		
Printed Name:		
Title:		
Date:	. 2023	

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File Attachments for Item:

11. CONSIDERATION OF APPROVAL, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF RESOLUTION R-2223-107: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, ADOPTING THE 2023 NORTH BASE MASTER PLAN FINAL REPORT DATED FEBRUARY 2023.



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 3/14/2023

REQUESTER: Brandon Brooks, Staff Engineer

PRESENTER: Shawn O'Leary, Director of Public Works

ITEM TITLE: CONSIDERATION OF APPROVAL, REJECTION, AMENDMENT, AND/OR

POSTPONEMENT OF RESOLUTION R-2223-107: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, ADOPTING THE 2023 NORTH BASE MASTER PLAN FINAL REPORT DATED

FEBRUARY 2023.

BACKGROUND:

Public Works, Utilities and Parks field operations and Fire Station No. 7/Emergency Operations Center are at the North Base Site located at the southwest corner of Flood Avenue and Rock Creek Road. Public Works Streets and Stormwater Divisions are operating at Lindsey Yard located at 668 East Lindsey Street. This has presented a special set of challenges over the years. Staff believes there is an opportunity to introduce efficiency into the day-to-day operations of Public Works', Utilities', Parks', and Fire Department's field activities by adopting a more thoughtful approach to facility utilization.

When the City acquired the North Base site in 1999, the City inherited the buildings that occupied that space. Most of the existing facilities are more than 70 years old and are unsuitable for current and future needs as they were built in the early 1940s to accommodate United States Navy operations.

Currently, the Public Works Department has operations at two major locations: North Base and Lindsey Yard. North Base is a 26-acre site that houses Fleet Operations and Maintenance, Traffic Operations and Maintenance, Utilities Line Maintenance facilities, Sewer and Waterline Maintenance, Sanitation Operations and Maintenance, Norman Utilities Authority material storage facilities, Fire Station No. 7, City Emergency Operations Center and a fueling station. This location was expanded in January 2022 to facilitate the City's Transit Operations and Maintenance, Emergency Vehicle Maintenance and Storage, and Parks Department equipment and maintenance facilities, as well as EV charging stations. Currently, Utilities Line Maintenance has a planned relocation to the new facility in Hall Park in 2023 or 2024. City Utilities Department/Sanitation Division is currently completing a new Operation Center at North Base.

Lindsey Yard is a 6-acre site that currently acts as a base of operations for the Street Maintenance Division and Stormwater Maintenance Division. Lindsey Yard houses both Divisions' maintenance materials, heavy equipment storage, traffic control device storage, aggregate stockpile, construction materials, and brine tanks.

On September 14, 2021, City Council approved Contract K-2122-49 with ADG-Blatt, formerly ADG, PC, in the amount of \$99,600 for the North Base Master Plan Project.

On January 10, 2023, City Council approved Amendment No. 1 to Contract K-2122-49 with ADG-Blatt increasing the contract by \$44,000 for a revised amount of \$143,600. This amendment provided additional design services to plan how the current Line Maintenance facilities should be modified to meet the needs of the Fleet Maintenance Division when that space becomes available in late 2023 or early 2024.

DISCUSSION:

The North Base Master Plan was broken into seven (7) tasks: Information Gathering, Programmatic Inventories, Operations Interviews, Program Projections and Space Allocations, Concept Development, Feasibility Study, and the final North Base Master Plan.

During Tasks one (1) through four (4), the consultant conducted interviews with each of the four City Departments. The focus of the interviews was to discuss and document the characteristics, activities, and initiatives of each Division, as well as their long-term plans and goals. The consultant inquired about the challenges faced at each facility, determined what worked well at each site, and discussed with divisional leadership where opportunities may exist to improve efficiencies and/or operations. The consultant documented the current conditions at each location as it related to programmatic use across each site and facility. Divisional operations were examined for organization across all interior and exterior spaces. Following the completion of all interviews, the consultant developed a recommended program for the North Base site for the next ten (10), twenty (20), and thirty (30) years. Operational efficiency and reduction in operating expenses were the central theme of the developed recommendations.

The final three (3) tasks of the proposed North Base Master Plan were focused on the development of an overall concept for North Base, the feasibility of that concept, and the production of a Final Report. The consultant went through several iterations of the conceptual plan and conducted meetings with divisional leadership after each iteration. Feedback was received and incorporated on the next round. Once a suitable conceptual plan was developed, the consultant began working on the feasibility study to determine the short, medium, and long-range costs associated with the plan. Appraisals were performed on both Lindsey Yard and a portion of land located south of the current City of Norman North Base facilities. Once all of the data was collected, the concept formed, and the feasibility study completed, the consultant compiled the information into the North Base Master Plan.

On February 21, 2023, City staff and ADG-Blatt presented the findings detailed in the North Base Master Plan to City Council during a Study Session. City Council discussed the plan and recommended it be forwarded to City Council during a regular meeting for adoption.

RECOMMENDATION:

Staff recommends approval of Resolution R-2223-107 adopting the North Base Master Plan, establishing a framework for expansion and development of North Base to improve the efficiency of and safety for the facilities occupied by four City Departments (Public Works, Utilities, Parks, and Fire) as funding opportunities will allow.

Resolution

R-2223-107

A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, ADOPTING THE 2023 NORTH BASE MASTER PLAN FINAL REPORT DATED FEBRUARY 2023.

- § 1. WHEREAS, the current facilities housing the Public Works, Utilities, Parks, and Fire Departments located at Lindsey Yard and North Base are determined to be undersized and inadequate for current and future operations; and
- § 2. WHEREAS, the City of Norman wishes to avoid losses in efficiency and increased risk to employee safety relating to the current facilities; and
- § 3. WHEREAS, the City of Norman's current facilities at Lindsey Yard and North Base were constructed by the United States Navy in the early 1940's; and
- § 4. WHEREAS, the City of Norman has undertaken a comprehensive review and analysis of the current conditions of both the Lindsey Yard and North Base facilities over a period of one year to develop a plan for improving the efficiency and reducing operational expenses in the future; and
- § 5. WHEREAS, the City of Norman has received a North Base Master Plan Final Report with detailed data, maps, analysis of current conditions, appraisals for Lindsey Yard, and an additional area of North Base to be acquired in the future, proposed site plans, and proposed phasing; and
- § 6. WHEREAS, City Staff and City Council have reviewed the North Base Master Plan Final Report; and
- § 7. WHEREAS, the proposed expansion of the North Base site will be necessary to complete the North Base Master Plan; and
- § 8. WHEREAS, the North Base Master Plan Final Report contains detailed phasing to allow for incremental implementation; and
- § 9. WHEREAS, the acceptance of the data and adoption of the principles outlined in the North Base Master Plan will still allow the City of Norman flexibility in its future funding strategy.

NOW, THEREFORE, BE IT RESOLVED BY THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA:



10.	THAT the City of Norman hereby adopts the North Base Master Plan Final Report as flexible planning tool to assist in the updating and expansion of North Base and the development of future City facilities.
	PASSED AND ADOPTED this day of, 2023.
A7	Mayor TTEST:
Cit	ty Clerk



Item 11.

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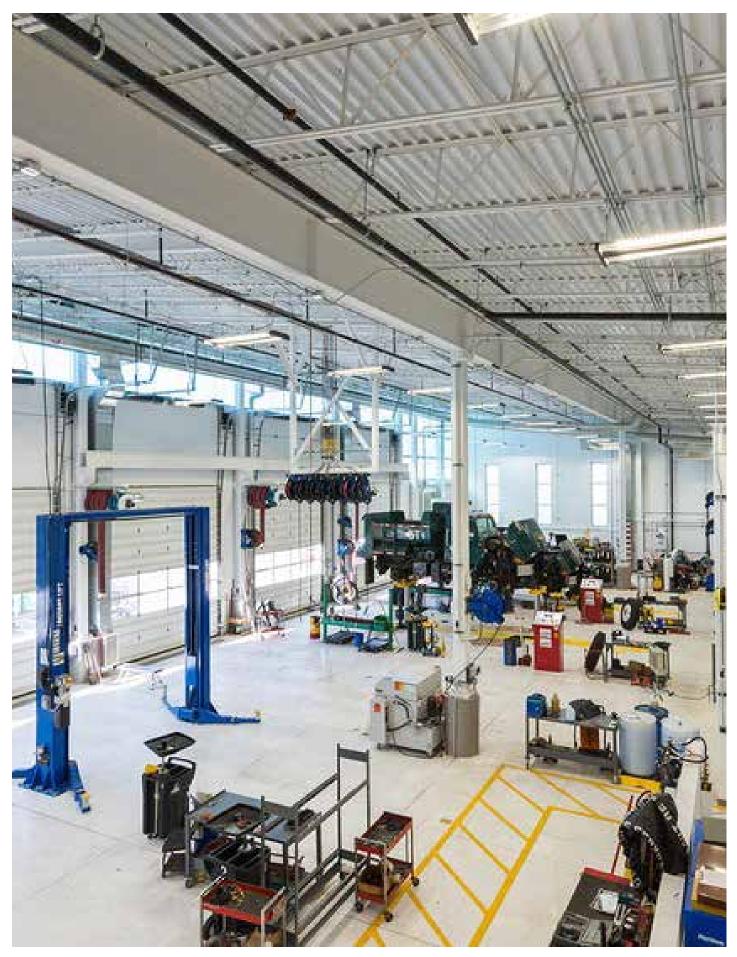


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MASTER PLAN TEAM

ADG | Blatt Project Manager, Design Development, Mechanical and Plumbing Assessment

CEC Corporation Civil and Electrical Assessment

White and Associates Construction Estimator

Artman Appraisals Commercial Appraiser

| 100





SECTION 1 INTRODUCTION







Master Plan Goal

The purpose of this Master Planning effort, as noted in the original request for qualifications, is to develop a "sound, actionable, and fiscally responsible facilities master plan that supports all aspects of multiple City of Norman departments' operational needs existing now and in the future. These departments include Public Works, Utilities, Parks and Recreation, and Fire Departments. Currently, the Public Works Department has operations at three major locations: North Base, Lindsey Yard and City Hall. The City of Norman Utilities Department also has operations at North Base, City Hall and four other locations. Parks and Recreation has operations at North Base, Griffin Park, City Hall, and multiple neighborhood parks. The facilities master plan should focus on the preservation and potential redevelopment and/or repurposing of current facilities as well as the identification of and/or planning for new facilities to establish a framework for the anticipated facility needs for the next 20 – 30 years by each department.

Master Plan Process

ADG | Blatt and the North Base Master Plan team have embarked on a series of tasks in order to compile the necessary data and information to fully execute this Master Plan effort.

- Task 1: Information Gathering
- Task 2: Programmatic Inventories
- Task 3: Operations Interviews
- Task 4: Program Projections and Space Allocations
- Task 5: Concept Development
- Task 6: Feasibility Study (current task)
- Task 7: Final Report

At the conclusion of each task, ADG | Blatt has submitted its findings in report format to the City of Norman Department of Public Works for review, comment, and approval. Throughout Tasks 4 and 5, as programmatic adjacencies were identified and conceptual designs began to take shape, the team had regular meetings with all divisions of Public Works and staff from the Utilities, Parks and Facility Maintenance, and Fire Departments. Staff feedback is crucial to the overall success of the design and this project was the proud benefactor of a wealth of commentary from all stakeholders.

This Final Report is be a comprehensive document compiling all of the information acquired throughout this process, notes from employee interviews, site commentary, cost estimates and projections, financial data, proposed master plan, and any other necessary documents relevant to this effort.

Project Considerations

The North Base Master Plan team is working to develop a Final Master Plan package that reflects the guiding principles from the City's vision and common themes generated during interviews in Tasks 1 - 3 with Public Works, Parks and Facility Maintenance, Utilities and Sanitation, Fire, as well as City of Norman management staff. These guiding principles include the following:

- Improve Efficiencies
 - Create space for shared work functions (ie. a shared welding in a centralized location for ease of use)
 - Combine shared functions and programs into the same space
 - Eliminate redundancies in administrative support staff by combining duplicated spaces
- Improve (and expand) Employee Areas
 - Enlarge employee locker rooms and break areas
 - Provide additional employee amenities to attract and retain talented staff
 - Explore outdoor wellness areas and green space
- Implement Sustainable Elements
 - Utilize solar energy to offset utility costs
 - Incorporating electric vehicle charging stations throughout the campus
- Increase Storage
 - Establish systematic organization in designated areas, reducing storing items in work areas which can potentially halt or hinder productivity
 - Provide storage bays that can house heavy-duty equipment and fleet vehicles in the event of a weather event that will not interfere with daily operations
- Address Parking
 - Separate employee parking from fleet parking and removed from daily operational circulation of vehicles
 - Ensure adequate parking for light, medium, and heavyduty vehicles now and with projected growth for the next 30-years
 - Provide covered parking throughout the campus

INTRODUCTION

Potential Project Savings

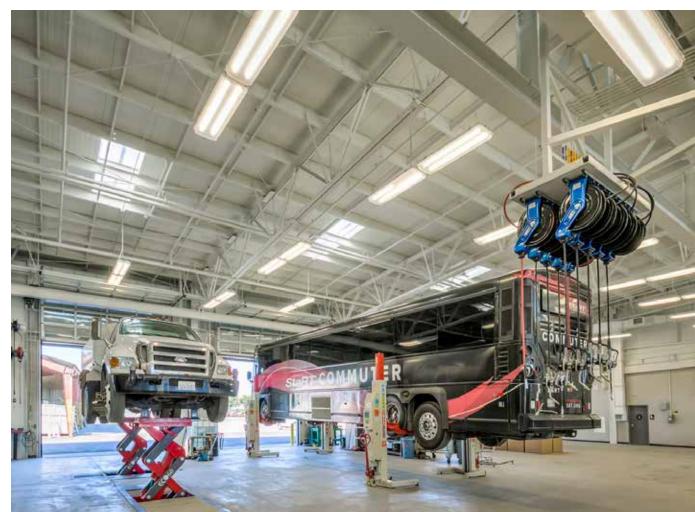
With the improvement of building technologies, sophistication of electrical and mechanical systems, and the incorporation of energy efficient practices, the Master Plan team estimates that considerable financial savings can be obtained in the amount the City of Norman expends in utility costs each year. Utilizing new and efficient building systems can also contribute to fewer maintenance costs overall.

The Master Plan team has recommended in their design the integration of solar panels at key areas, primarily any accommodating roof top and atop covered parking structures.

Please see the Mechanical and Plumbing narrative in Volume I, Section 4 that details recommended HVAC systems, plumbing considerations, as well as energy saving components and their range of impact.

Combining these savings with consolidated administrative spaces and shared work functions have potential savings in staffing, administrative, and equipment maintenance costs. Reducing redundancies in programmed space creates opportunities for further cost savings or potential to incorporate additional functions that are crucial to daily operations that have not been previously accounted for. Sharing equipment that is intermittenly used with each Public Works division eliminates the need for multiple pieces of equipment and the associated costs with maintaining duplicative items.







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SECTION 2 EXISTING CONDITIONS





LINDSEY YARD SITE

Site Overview

A key goal of the North Base Master plan is consolidating Public Works operations to its North Base facilities, primarily its operations at Lindsey Yard.

The North Base site is currently the base for the following City of Norman Departments and their divisions:

- Public Works, Fleet Division
- Public Works, Traffic
- Public Works, Transit and Parking
- Parks and Recreation, Parks Maintenance
- Utilities, Line Maintenance
- Utilities, Sanitation
- Fire Department

It is important to note from this list, Line Maintenance currently has a new facility on a separate site under construction. They will not have a future presence at this location. The North Base site also has land previously used as lay down space for Traffic's light poles, traffic lights, etc. This space is now the construction site for the City of Norman new Sanitation Facility. There are a myriad of storage sheds / buildings that house an array of items depending on its managing entity.

The Lindsey Yard is the location of Public Works's Streets and Stormwater divisions. Lindsey Yard is also the primary location for bulk material storage and lay down space for rip rap, miscellaneous construction materials, and equipment. It is the only location for salt storage as well as brine production and storage. The salt storage has been reported to be undersized.

Upcoming Development Considerations

A new multi-modal path is currently under design for the west side of Flood Avenue. The path will provide additional pedestrian, bicycle connectivity to surrounding commercial development and OU facilities.

The Aviation and Aerospace Academy has received funding from the State of Oklahoma due to the American Rescue Plan Act. The Academy will be transitioning from their current location west of the North Base Complex and south of the Fire Department to a proposed parcel south of Lexington Avenue. The Master Plan team recommends that conversations with the Aviation and Aerospace Academy take place to minimize impact on the proposed Master Plan design.





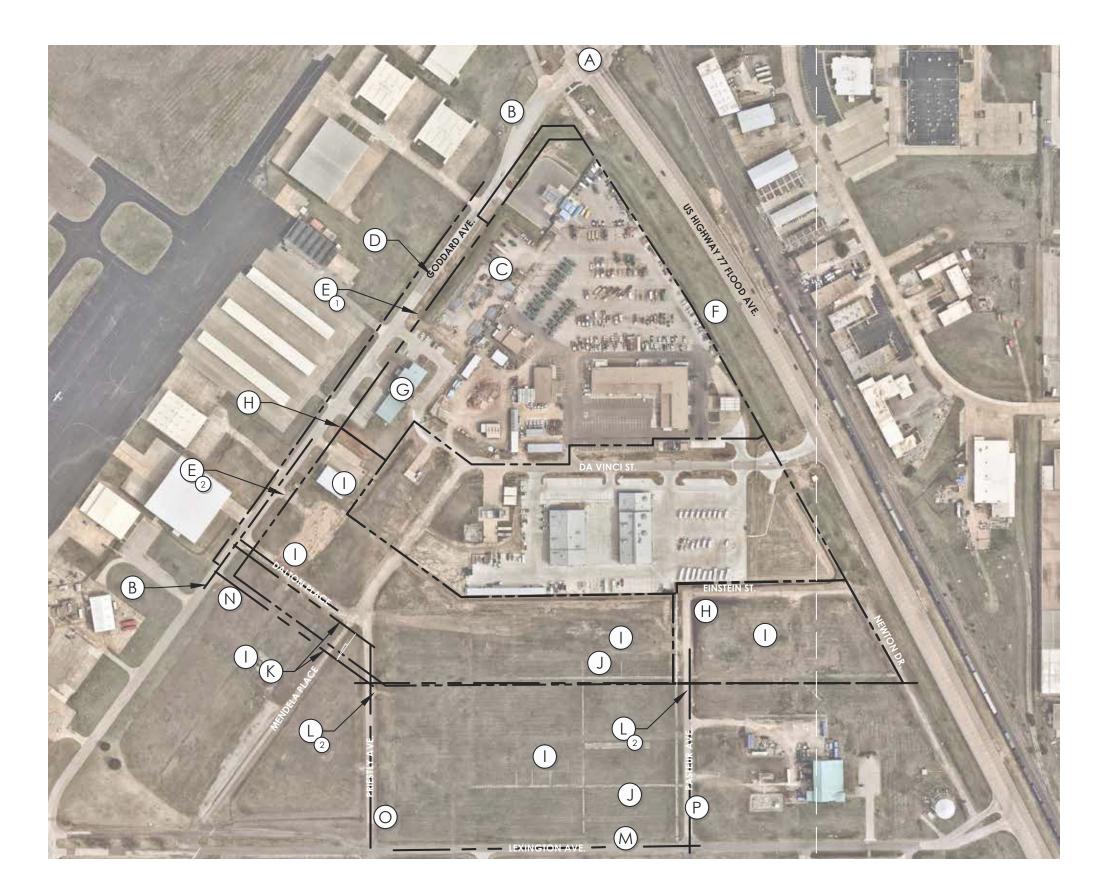
LEGEND

- Goddard Ave. to become public road (Extent TBD)
- B The University of Oklahoma Land (ROW)
 Add landscape and berm maintenance
- C 13.4 Acres The University of Oklahoma
- Road alignment: Move centerline of Dalton Place southwest 117'+-
- E Lexington Avenue Access
 - ① Option 1
 - 2 Option 2
- Extent TBD)

 Lexington Avenue to become public road (Extent TBD)
- G Dalton Place to become public road (TBD)
- (H) Priestly Avenue to become public road (TBD)
- Pasteur Avenue to become public road (TBD)

Site Acquisition

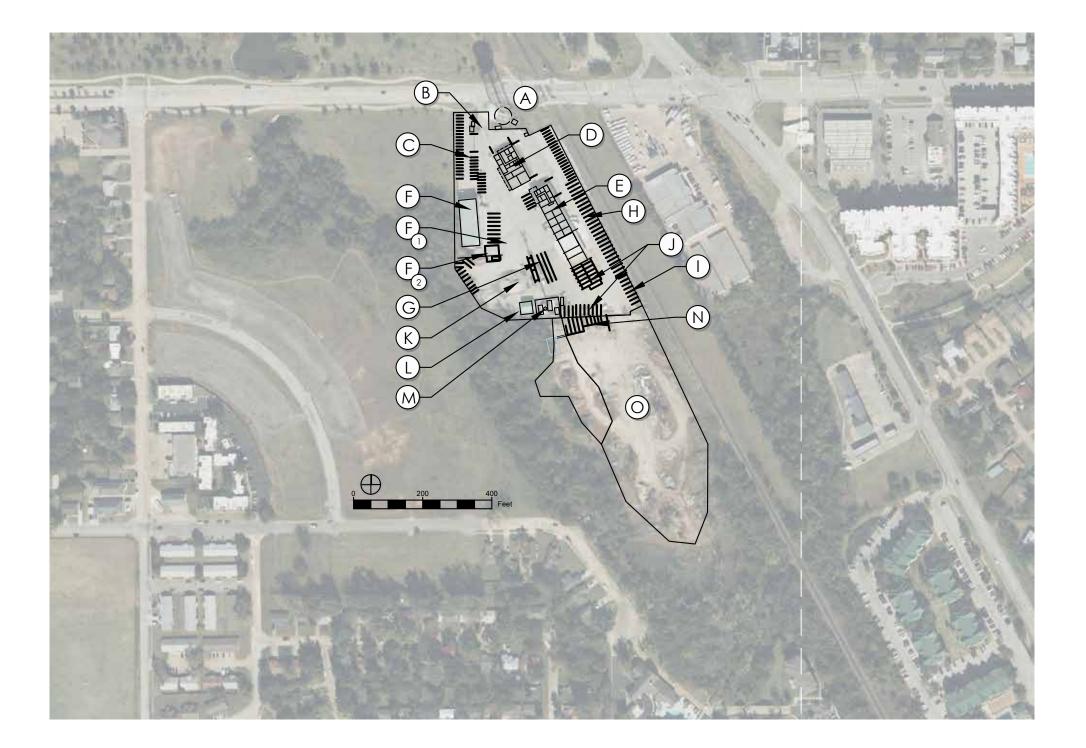
To fully satisfy the goals and guiding principles of this Master Plan, it is the recommendation that additional land be acquired to the south of the current City of Norman property at North Base. See the Exhibit to the left indicating the property proposed. The Master Plan team has conducted a property appraisal of this parcel of land, as well as an appraisal of its Lindsey Yard, to project its financial contributions to the construction of the proposed buildings included in this Master Plan design concept. Please see Volume II, section 07 for the commercial appraisal reports.



LEGEND

- A Light Controlled Intersection of US Highway 77 Flood Ave. & Goddard Ave.
- (B) Goddard Ave. to become public road (Extent TBD)
- © Future location for new sanitation department building
- (D) Goddard Ave. area subject to flooding
- (E) Goddard Ave. Access
 - ① Option 1
- ② Option 2
- F) Landscape buffer 115'+-
- (G) Fire Station
- (H) Area subject to ponding water
- (1) Existing building pad verified and removed
- (J) Existing sidewalks verified and removed
- Roads Realignment move center line of Dalton Place southwest 117'+-
- Lexington Ave. Access
- ① Option 1
- ② Option 2
- (Extent TBD)

 Lexington Ave. to become public road
- N Dalton Place to become public road (TBD)
- O Priestly Ave. to become public road (TBD)
- Pasteur Ave. to become public road (TBD)



<u>LEGEND</u>

- (A) Water Tower
- (B) Entry Gate
- © Staff/Small Vehicle Parking 74 Spaces
- D Building #1
- 1 Main Offices, Lockers and Meeting Rooms
- ② Storage Bays
- E Building #2
- ① Crew Offices, Meeting Room/Shelter
- 2 8 Work Bays
- 3 2 Bays Bulk Storage
- 4 2 Bays Brine Mixing and Storage Tanks
- (F) Salt Barn
- 1) Mixing
- 2 Loading Ramp
- G Equipment Staging area
- H) Equipment Parking 25 Spaces
- Rack Storage 8 Spaces
- J Heavy Equipment Parking 22 Spaces
- (K) Sand
- (L) Chem Storage
- M IT Cell Tower
- N Trailer Parking 10 Spaces
- Material Storage on OU Land



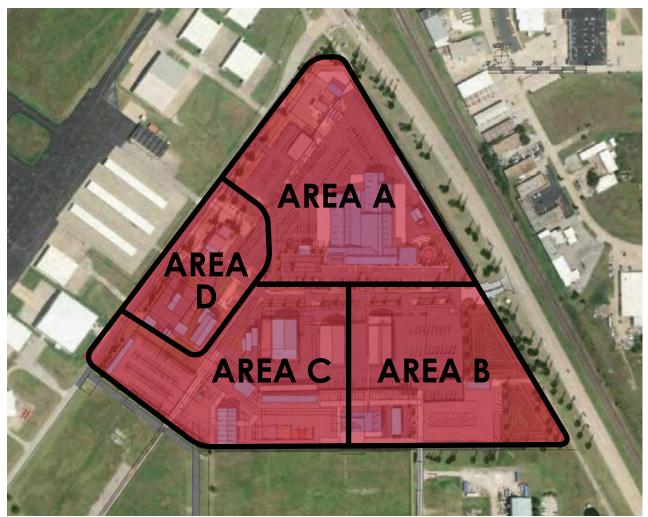


SECTION 3 PROPOSED DESIGN



Item 11.

The subsequent pages more fully detail the components and features of this Master Plan, please use the legend below to navigate this section. As portions of Areas B and C include the parcel of land that the Master Plan team is recommending the City of Norman acquire and complete this work as one phase, the pricing for these areas are shown together.



KEY MAP



EV PARKING EMPLOYEE SPACE

Proposed Program for the North Base Complex

AREA A

Sanitation Building (Currently under construction)

Additional Fuel Pump island at North CNG Fill station

Generator with Enclosure

CNG Slow-Fuel Stations

Employee Parking

AREA B

CNG Slow-Fuel Stations

Existing Fleet Transit Facility

Existing Bus Parking

Existing and New Detention Ponds

Lay down space for miscellaneous equipment, bulk materials, etc.

Light Pole Racks

AREA C

Warehouse space with Loading Dock

Equipment Storage and Staging

Existing Parks Maintenance Building

New Facility Maintenance Building with Secured Yard Space

Future Wash Bay (to start construction Q4 2022)

Open and Covered Bulk Material Storage

Secure Parking Lot for Auction Holding

AREA D

Existing Fire Station

Fire Tower

Fire Apparatus Storage and Maintenance Building

THROUGHOUT

Light, Medium, and Heavy-Duty Fleet Parking

Electric Vehicle Charging

Storage Sheds

Proposed New Buildings

Please Note: These square footages are estimates based on the conceptual designed and could fluctuate +/- 100 square feet.

Main Campus Building 119,600 sf Streets and Stormwater Maintenance Bays 13,600 sf Salt Barn 12,200 sf

Proposed Budget-Range for the North Base Complex

 New Construction, Area A
 \$43,382,000 - \$60,633,400

 New Construction, Areas B + C
 \$12,469,300 - \$18,669,900

 New Construction, Area D
 \$4,840,000 - \$6,357,900

 Site and Site Utilities
 \$1,373,300 - \$2,101,800

Total Range \$62,064,400 - \$87,762,700



^{*} A detailed breakdown of costs can be found in Section 5

AREA A



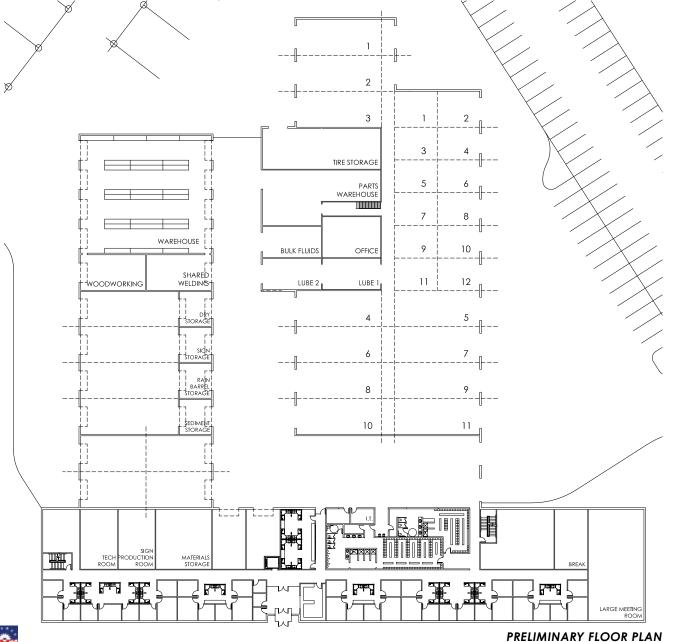


Area A

- A Relocated and Enlarged Fueling Station (5 Lanes)
- B Large Vehicle Parking 28 Spaces
- C Large Vehicle Parking 43 Spaces
- D Large Vehicle (Sanitation) Slow Fuel CNG 28 Dual Post for 56 Vehicles
- E For Service, Done Line, 38 Spaces Covered, etc - 118 Spaces
- (F) Staff and Visitor Parking 173 Spaces
- G Long Vehicle For Service 28 Spaces, 19 Spaces Covered
- H Electric Vehicle Charging Stations
 - ① Station A
 - ② Station B
- New Sanitation Department Buildina
- J Sanitation Staff Parking
- $\stackrel{\textstyle (K)}{\textstyle {\sf New Driveway}}$
- L) Fleet Maintenance Bldg. #2
- M Roadwork
 - 1 Goddard Ave. to become Public Road
 - 2 Access to Goddard Ave. Option 1

Area A is the original portion of the North Base complex. Currently, the Fleet and Traffic Divisions of Public Works operate out of this location. Throughout the information gathering phases with these divisions, as well as Streets and Stormwater, a common theme heard was insufficient work space. The number of existing work bays are minimal and are in high demand - especially during a weather event. Heavy-duty vehicles need space to be stored that does not infringe on current operations or hinder any future work necessary. Each division also has shared tasks and functions, for example welding, chemicals, and fluids. Incorporating a centralized welding bay and inventory location helps increase efficiencies across divisions and reducing maintenance costs on multiple welding units.

Combining administrative functions in one common space gains efficiencies from both staffing and energy efficiency perspectives. The Master Plan team also recommends improving employee amenities such as breakrooms and gathering spaces.



Proposed Program for Area A

Site

Main Campus Building

Sanitation Building (Currently under construction

Employee Parking

Light to Medium-Duty Fleet Parking

Additional Fuel Pump island at North CNG Fill station

Generator with Enclosure

Electric Vehicle Charging

CNG Slow-Fuel Stations (Dual Post Dispenser)

Main Campus Building

Please Note: These square footages are estimates based on the conceptual designed and could fluctuate +/- 100 square feet.

Administration Office Spaces for the following: 37,000 sf

Fleet

Traffic

Streets

Stormwater

Work Bays 65,000 sf

Employee Break Rooms
Employee Locker Rooms

Multi-Purpose Meeting Rooms

Conference Rooms

Office Spaces for Technicians and Crew members

Storage 17,000 sf

Circulation, Mechanical Spaces (~ 40%)

Total Square Footage of Main Campus Building 119,000 SF

Proposed Budget Range for Area A

\$1,176,600 - \$1,846,200
\$30,227,200 - \$44,328,200
\$1,214,000 - \$1,607,100

Total Range for Construction Budget \$32,617,800 - \$47,781,500

Soft Costs \$10,764,100 - \$15,044,500

Total Estimated Budget Range for Area A \$43,383,000 - \$60,634,000

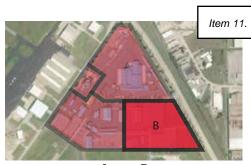
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^{*} Solar Panels anticipated to cover a significant portion of the administration wing

^{*} A detailed breakdown of costs can be found in Section 5

AREA B





Area B

- A Staff Parking
- B) Fleet Maintenance Bldg. #1
- © Bus Parking Existing
 - ① Expansion Area (CNG and EV TBD)
- Detention Basin Area
 - 1 Existing Area
 - 2 Expansion Area
- (E) Large Equipment Parking
 - 1) 24 12'x38' Spaces
 - 2) 32 10'x22' Spaces Light Duty
- F Trash Enclosure
- G Equipment Storage Area
 - 1 11 12'x60' Spaces
 - ② 6 12'x60' Spaces
 - 3 22 12'x44' Spaces
- H Streets and Storm Maintenance Bldg. #1
 - 10 Bays 20'x40'
 - 2 Shared Warehouse (5856 sf)
 - 3 46 9'x20' Spaces
 - 4) 50' Clearance A
 - (5) 50' Clearance B
- (I) Sight Proof Fence
- ① Excess Traffic Maintenance Storage Racks
 - 1) Pole Racks
 - 2) Shed 100'x30'
- (K) Optional Entry / Exit Gates
- (L) Chemical Storage

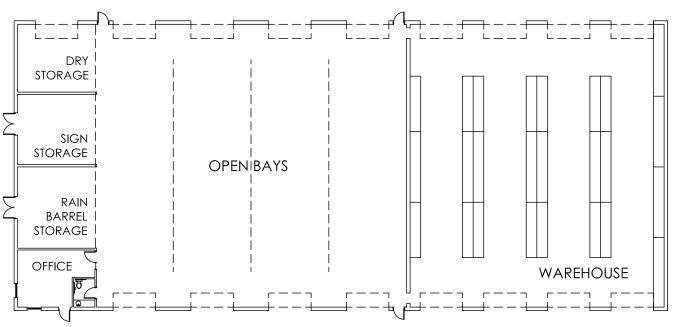
Area B contains a portion of the land that this Master Plan recommends acquiring directly to the south of the recently completed Parks Maintenance Facility and Transit Maintenance Facility. In order for Area A to function smoothly with the servicing of fleet vehicles, circulation of Sanitation trucks, and other regular vehicle traffic, a separate location was identified for the storage of large equipment, heavy-duty vehicles, construction materials, and bulk materials. Open and covered bulk material storage can be found in Area C. A lay down yard containing miscellaneous equipment, building materials, light pole racks, and miscellaneous items is configured to accommodate contractor trucks as they load and unload per project need. Additional service bays with warehouse space was placed to support functions relating to this area of the complex, most likely connect to the work conducted by the Streets and Stormwater Divisions. A proposed floor plan of the maintenance bays is shown below. These bays also function as large vehicle storage during inclement weather, for vehicles that cannot be exposed to freezing temperatures.





LIGHT POLE RACKS

WAREHOUSE SPACE



PROPOSED FLOOR PLAN

Proposed Program for Area B

Site

Existing Fleet Transit Facility

Existing Bus Parking

Existing CNG Slow-Fuel Stations

Existing and New Detention Ponds

Streets and Stormwater Maintenance Bays

Warehouse space

Loading Dock

Lay down space for miscellaneous equipment, bulk materials, etc.

Light Pole Racks

Equipment Storage

Covered Storage Shed

Employee Parking

Electric Vehicle Charging

Streets and Stormwater Maintenance Bays

Please Note: These square footages are estimates based on the conceptual designed and could fluctuate +/- 100 square feet.

Additional Work Bays 6,300 sf Warehouse space 5,200 sf Storage 1,300 sf Crew Office 400 sf

Circulation, Mechanical Spaces (~ 40%)

Total Square Footage of Maintenance Bays 13,100 sf

Proposed Budget-Range for Areas B + C

 New Construction
 \$11,261,700 - \$17,055,900

 Site and Site Utilities
 \$1,074,500 - \$1,413,200

Total Range for Construction Budget \$13,096,100 - \$19,608,900

Soft Costs \$4,322,000 - \$6,471,100

Total Estimated Budget Range for Area A \$17,419,000 - \$26,080,000

^{*} Solar Panels anticipated to cover a significant portion of the maintenance bays

^{*} A detailed breakdown of costs can be found in Section 5

AREA C





Area C

- A Wash Bay
- B) Parks & Recreation Maintenance
 - 1 Parking Existing
- © Facilities Maintenance Bldg. #3
 - 1 12,000 sf Bldg.
 - 2 100'x30' Shed
 - 3 Storage Yard
 - 4 80'x55' Bldg.
 - 5 6 12'x30' Spaces
 - 6 7 12'x38' Spaces
- D Equipment for Auction Holding
 - 1 98 Spaces
 - 2 Shed on Back Wall
 - (3) Fence and Gates
- (E) Large Equipment Parking
 - ① 24 12'x38' Spaces
- (F) Yard Supervisor Bldg.
- G Entry / Exit Gate
- (H) Materials Storage
 - 1) Bin Blocks with Shed
 - 2 Bin Blocks
 - 3 90' Wide Loading and Drive / Staging
- Rack Storage
- Salt Storage and Distribution (26,522 SF)
 - 1 Brine Mixing and Tanks
- (K) Road Reconfiguration
- (L) Sight Proof Fence

Area C, in addition to Area B, contains a portion of the land that this Master Plan recommends acquiring directly to the south of the current North Base Complex. In order for Area A to function smoothly with the servicing of vehicles, circulation of Sanitation trucks, and other regular vehicle traffic, a separate location was identified for open and covered bulk material storage. The Salt Barn will be transitioned from its location at Lindsey Yard to its proposed in Area C, accommodating proper truck turnarounds for salt drop-off. Brine mixing and tanks will also be included in the Salt Barn. Adjacent to the Salt Barn is rack storage containing salt-spreaders and any other necessary equipment for brine and salt distribution. Overflow fleet and equipment storage are interspersed throughout.

The Facility Maintenance Department is currently planning a new facility - with warehouse and maintenance bays. This department is managed alongside the Parks Maintenance Division of Parks and Recreation, giving priority to the facility being located near its existing facility (construction completed Winter 2022). The Master Plan design placed the new Facility Maintenance building in the land adjacent to this building, the current location for the Fire Training Tower. When considering sequencing, the new Fire Training Tower will need to be under construction or completed before this facility is designed or built.

A key need that the Fleet Division identified for their operations is a separate, secure parking lot for vehicles and equipment that are slated to be auctioned. This "Auction Lot" is located at the west side of this area, secured by a fence with a sliding gate. Sight proof fencing borders the southern perimeter as an aesthetic and security measure.





SALT BARN

BULK MATERIAL STORAGE



Proposed Program for Area C

Site

Existing Parks Maintenance Building

New Facility Maintenance Building with Secured Yard Space

Future Wash Bay (to start construction Q4 2022)

Open Bulk Material Storage

Covered Bulk Material Storage

Storage Sheds

Additional Fleet and Employee Parking

Salt Barn

Large Equipment Staging

Heavy-Duty Vehicle Parking

Secure Parking Lot for Auction Holding

Salt Barn

Please Note: These square footages are estimates based on the conceptual designed and could fluctuate +/- 100 square feet.

Salt Storage 12,000 sf

Brine Production and Storage

Total Square Footage of Salt Barn

12.000 sf

Proposed Budget-Range for Areas B + C

 New Construction
 \$10,636,799.80 - \$16,120,117.11

 Site and Site Utilities
 \$1,072,494.35 - \$1,409,731.85

Total Range for Construction Budget \$13,096,100 - \$19,608,900

Soft Costs \$4,322,000 - \$6,471,100

Total Estimated Budget Range for Areas B + C \$17,419,000 - \$26,080,000

^{*} A detailed breakdown of costs can be found in Section 5

AREA D





Area D

- A Fire Station
 - 1 Existing Station
 - 2 Station Bay Addition
 - 3 35 New Parking Spaces

B Fire Tower (Verify Clearance Area Around)

- (Verify Gate & Control Access Locations in Road)
- © Fire Apparatus Storage & Maintenance Bldg.
 - 1 Existing Area
 - 2 New Building
- D Station Bay Addition

AREA D

Area D is specifically programmed for the City of Norman Fire Department. The Fire Department's main goals for their site at North Base is to increase employee parking, enhance their training program amenities, and incorporate on-site storage and maintenance structures. This Master Plan explores the option of relocating the Fire Training Tower from its previous location to land adjacent the station. After an inventory of the various storage requirements at the station, training tower, and considering future growth, a storage building with six maintenance bays was developed to address this need and capture any future storage concerns.

With the proposed concept for Area D, there are two options for access to Goddard Avenue supplementing the station's existing access. The City of Norman is currently evaluating these two options and will direct the Master Plan team on which road to proceed with. Access to Area D from the remainder of the North Base complex is still under discussion by the Fire Department, if a secure perimeter needs to be established, and where entry/exit points would be located.

A 300' x 300' training pad has been discussed as a need for the Fire Department portion of the North Base Complex. Two possible locations have been identified in this Master Plan and are currently under review with the Fire Department.

Proposed Program for Area D

Site

Existing Fire Station
Additional Employee Parking
Fire Tower
Fire Apparatus Storage and Maintenance Building
Covered Storage
Electric Vehicle Charging
Access to Goddard Avenue

Proposed Budget-Range for Area D

Demolition of Existing Paving and Buildings \$16,000 - \$22,800

New Construction \$4,965,900 - \$6,507,500

Site and Site Utilities \$100,200 - \$145,600

Total Range \$4,839.905 - \$6,357,811.15

Soft Costs \$1,677,200 - \$2,203,200

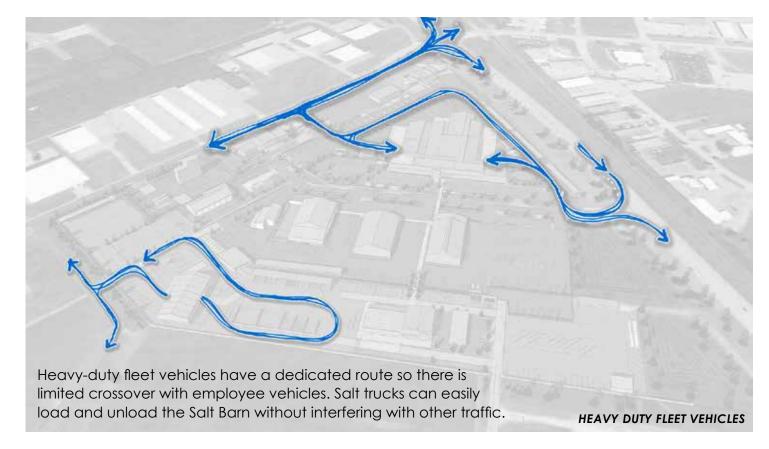
Total Estimated Budget Range for Area D \$6,760,000 - \$8,879,000

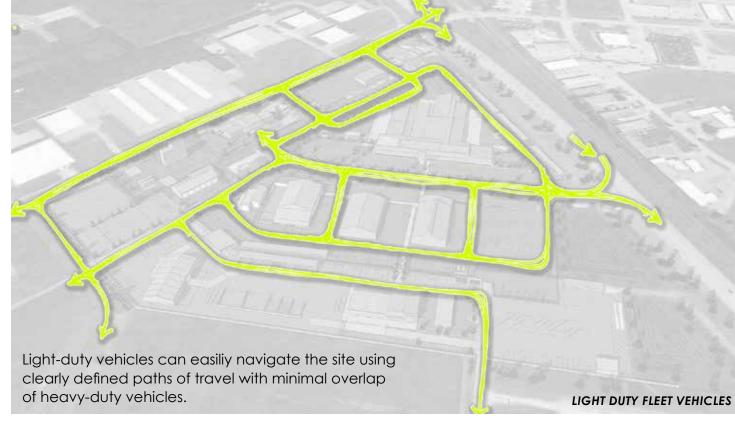
* A detailed breakdown of costs can be found in Section 5

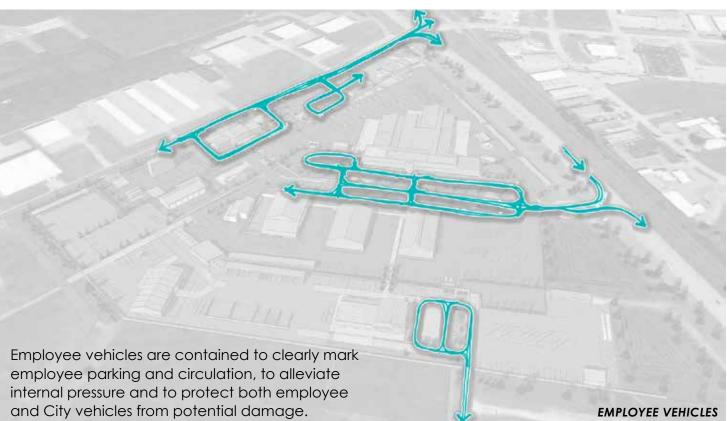


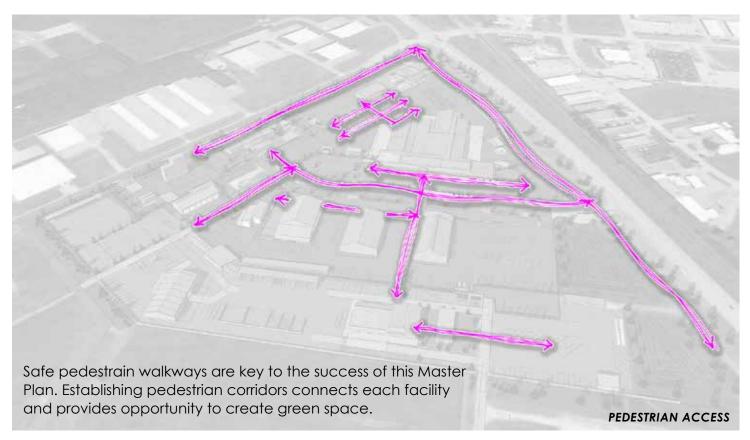












PHASING PLANS: PHASES 1-2

Site Preparation:

Efforts performed as a part of the North Base Master Plan, including existing and expanded land areas, will be executed in a manner to minimize impact on current and future staff / activities. Master Plan phases are purposefully identified to take advantage of economies of construction scale while eliminating program redundancies. The intent of this effort is that the execution of the Master Plan will provide cost savings to the City of Norman and improve the quality of the work experience for staff members.

Phase 1: North Parking Lot

- 1.1. Relocation of the Fuel Service function to the north portion of the property, adjacent to the existing CNG fuel service islands and with gated controlled vehicular access to Goddard Avenue. All existing Fuel Service infrastructure, including but not limited to the sub-grade storage tanks, will be demolished and not retained. Testing of the service location will be required to confirm that there is no contamination of the site.
- 1.2. Additions and amendments to the current slow fill compressed natural gas islands / infrastructure. For the islands that service the large sanitation vehicles, the intent is for all infrastructure to remain in place and unchanged. Islands that serve the medium sized vehicles will be relocated outside of the zone of land that is dedicated for the future buildings identified as a part of this overall master plan.
- 1.3. Communications lines through the eastern portion of the site serving the facility south of Da Vinci Street will remain. Said lines are to be preserved and protected during construction.
- 1.4. Paving modifications will be made to accommodate future and relocated parking. This is specifically for vehicles that will be displaced during future phases of the master plan and will not be for staging of potentially auctioned vehicles, holding vehicles for future parts, nor for items that are deemed as refuse.
- 1.5. Accommodations including sub-grade raceways for future electric vehicle charging stations will be implemented during this phase. Incorporation of this scope into a larger electrical utility effort will maximize economies of scale.
- 1.6. Demolition of existing Sanitation Building as operations transition to their new facility.

Phase 2: Overhead Electrical Removal and Relocation

- 2.1. The existing overhead electric line bisects the property in a manner that restricts site development and the Master Planning effort.
- 2.2. In preparation of future buildings, the overhead electrical line will be routed below ground in a manner that does not impact buildings to remain operational during the respective phases of the work. This will be relocated to allow for Phase 5 to be constructed. Please note: the overhead electric line shall only be demolished back to the pole that currently serves fleet maintenance. This will allow this building to remain operational until Phase 7.
- 2.3. The existing Traffic Building is fed by this overhead line. It needs to remain online until Phase 7 and will either need to be relocated or operations transitioned to another location. If it is to remain, it could be backfed from Goddard Ave to the East, but could possibly be at a significant cost to the project.
- 2.4. During the execution of this intensive electrical scope, efforts will be made to accommodate a future pad site for multiple generators. Initial execution may be a single generator that addresses critical infrastructure on the North Base site. The long range plan will accommodate multiple generators, positioned functionally and economically on the site. One of these sites will be in alignment with the relocation of the current overhead electricity lines.





PHASING PLANS: PHASE 3

Phase 3: South Site Development & Access Drive to the North

- 3.1. Acquisition of land immediately south and adjacent to the current Parks Maintenance, Large Fleet Maintenance and detention pond is the proposed method to accommodate the program elements associated with the long range master plan. Specific components requiring additional land include:
 - a. Relocation of the Lindsey Yard functions, specifically street and stormwater maintenance, to the North Base property.
 - b. Repositioning existing north base functions, including sign and traffic maintenance, to the south side of the site.
- 3.2. Renovations and remodels of existing buildings, especially within an occupied site, is expensive in both time and cost. Existing buildings are not anticipated to be renovated or remodeled to accommodate departments relocating from the Lindsay Yard to the North Base campus.
- 3.3. Expansion into the south property and use of this land for new construction of existing and relocated functions will save time, money and will not impact current staff and functions until the projects are operational and ready for occupation. Cost savings associated with this approach including the following:
 - a. Projected construction of new buildings will take advantage of current building technologies and efficiencies which will facilitate a lower operational cost.
 - b. Critical evaluation of department staffing may identify redundant job descriptions that can be redistributed on the north base campus to maximize each staff members contribution to the overall Master Plan.
 - c. Evaluation of current program elements may identify redundant functions within multiple buildings. These functions can be consolidated for cost savings and efficiency.
- 3.4. Program elements that are considered for the south expansion of the North Base property include the following:
 - a. Dedicated space for storage of vehicles serviced by Fleet Maintenance and deemed for auction.
 - b. Parking for staff and vehicles to accommodate the projections of the long range master plan. During initial phases of the plan, these spaces will accommodate those displaced by construction of buildings north of Da Vinci Street.
 - c. Salt Storage and Distribution facility: sized and sited for ease of access, loading and for appropriate quantities of materials.
 - d. Material Bulk Storage: including accommodating the required volumes present at that the current Lindsey Yard Site.
 - e. Shared Warehouse Facility
 - f. Streets and Storm Maintenance Building
 - g. Equipment Staging Areas
 - h. Electric Vehicle Charging Stations
 - i. With the increase of impervious area during development of the site, should detention be required, the open area east of the site would be a suitable location to plan for a detention pond as it is located at the low point of the property, similar to the developed area with detention pond due north.



- 3.5. Building construction types will be functional, efficient, and cost effective. Buildings constructed during Phase 3 will be primarily pre-engineered metal buildings, consistent with the recently constructed Parks and Large Fleet Vehicle Maintenance buildings.
- 3.6. The Salt Barn will have a modified construction with minimal ferrous metals and extremely high performing materials, responding to the corrosive environment indicative of salt storage. The space may include a combination of reinforced concrete push walls and canvas upper sections of the building.
- 3.7. Access to the south boundary of the North Base campus will be via Mendela Place and Priestly Avenue with a secured entrance at the intersection of the property line and Mendela Place. This location can either be manned during hours of operation or can be accessed via remote technology.
- 3.8. Per utility atlas information, it appears that OU Facilities Management and AT&T have existing utilities lines along Mendel Place that will need to be taken into consideration and coordinated at the time of design and development.
- 3.9. New utility service lines will need to be extended from the existing utilities in the vicinity to provide required services to the new facilities in this area.
- 3.10. A sight proof fence will be used along the south boundary to screen activities from adjacent uses.

PHASING PLANS: PHASES 4-5

Phase 4: West Site Development

- 4.1. Phase 4 addresses the Fire Department function of the property on the west side of the North Base campus and immediately adjacent to Goddard Avenue.
- 4.2. Program elements considered for this area on the west portion of the property include but are not limited to the following:
 - a. Relocated Fire Tower. This function will require perimeter security, access control and defined clearances around the tower element
 - b. Fire Apparatus and Storage and Maintenance Building
 - c. Open area for fire training activities
 - d. Expansion of parking areas to accommodate Master Plan projections
- 4.3. Building construction types will be functional, efficient, and cost effective. Buildings constructed during Phase 4 will be a combination of the following:
 - a. Pre-engineered metal buildings, consistent with the recently constructed Parks and Large Fleet Vehicle Maintenance buildings
 - b. Conventional steel-framed buildings where required by the program or evaluation of the scope and budget.
- 4.4. Most of the existing utilities in this area may be able to remain, pending the finalized site plan for the area. If not, existing water, storm sewer, sanitary sewer and gas lines may be removed and/or relocated, as needed, to accommodate the new development and maintain the surrounding existing facilities.

Phase 5: North Facility Development

- 5.1. Relocation and reallocation of North Base program functions, both staffed buildings and utility infrastructure, creates areas for new construction including the following:
 - a. Paved area immediately north of the current Fleet Maintenance Building
- 5.2. Construction of new buildings shall accommodate the current staff and program components of existing departments on site. Building programs and associated construction requirements will be evaluated during each phase of the work. Construction will be implemented efficiently, including accommodating growth where appropriate and available.
- 5.3. New Buildings will be designed for future expansion during subsequent phases of the Master Plan. This will happen after existing buildings are demolished.
- 5. 4. Building envelope, infrastructure and utility tie ins will be projected and planned in the construction of new buildings.
- 5. 5. Projected new buildings and program elements include but are not limited to the following:
 - a. Fleet Maintenance Building
 - b. New Central Warehouse Building
 - c. Tie in to redistributed electrical infrastructure and generator service
- 5. 6. Building construction types will be functional, efficient, and cost effective. Buildings constructed during phase five will be a combination of the following:
 - a. Pre-engineered metal buildings, consistent with the recently constructed Parks and Large Fleet Vehicle Maintenance buildings
 - b. Conventional steel-framed buildings where required by the program or evaluation of the scope and budget





PHASING PLANS: PHASES 6-7

Phase 6: Central Site Development

- 6.1. The current land area immediately adjacent to and west of the new Parks Maintenance Building is specifically designated to accommodate the following Program Elements:
 - a. New Building for the Building Maintenance Department
 - b. New Vehicle Wash Bay (currently bidding to General Contractors and slated for construction in Q4 2022)
- 6.2. The existing water, storm sewer, sanitary sewer and communications lines through the area will need to be maintained and/or removed or relocated, as needed, to accommodate the new facilities and maintain the surrounding existing facilities.

Phase 7: North Facility Development

- 7.1. Relocation and reallocation of North Base program functions, both staffed buildings and utility infrastructure, creates areas for new construction including the following:
 - a. Land area immediately west and adjacent to the current Fleet Maintenance Building. This area is accessible after demolition of the portion of the building previously occupied by the Line Maintenance Department.
- 7.2. Construction of new buildings shall accommodate the current staff and program components of existing departments on site. Building programs and associated construction requirements will be evaluated during each phase of the work. Construction will be implemented efficiently, including accommodating growth where appropriate and available.
- 7.3. New Buildings will be designed for future expansion during subsequent phases of the Master Plan. This will happen after existing buildings are demolished.
- 7.4. Building envelope, infrastructure and utility tie ins will be projected and planned in the construction of new buildings.
- 7.5. Projected new buildings and program elements include but are not limited to the following:
 - a. Traffic Maintenance Building
 - b. New Central Warehouse Building
 - c. Tie in to redistributed electrical infrastructure and generator service
- 7.6. Building construction types will be functional, efficient, and cost effective. Buildings constructed during phase seven will be a combination of the following:
 - a. Pre-engineered metal buildings, consistent with the recently constructed Parks and Large Fleet Vehicle Maintenance buildings
 - b. Conventional steel-framed buildings where required by the program or evaluation of the scope and budget
- 7.7. The existing water, storm sewer and additional CNG and communications lines through the area will need to be maintained and/or removed or relocated, as needed, to accommodate the new facility and maintain the surrounding existing facilities.
- 7.8. New utility service lines will need to be extended from the existing utilities in the vicinity to provide required services to the new facilities in this area including a sanitary sewer service line from the south. A new electrical service capable of supplying all of Phase 5 and 7 shall be installed at this time.





PHASING PLANS: PHASES 8-9

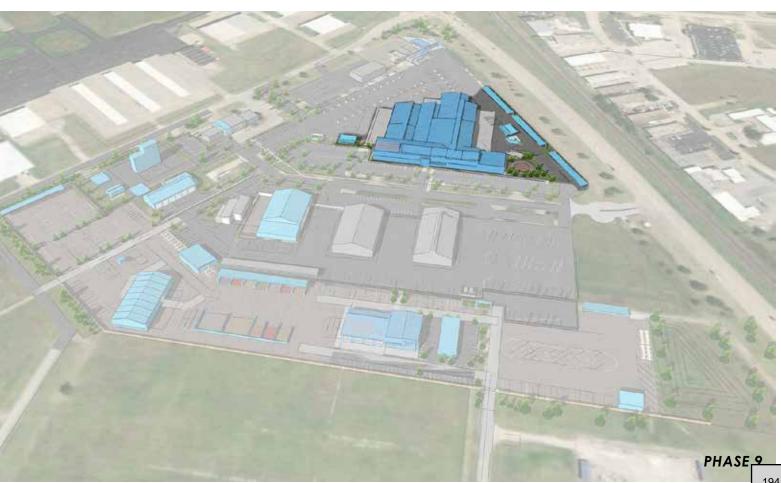
Phase 8: South Facility Development & Parking

- 8.1. The balance of the land immediately north of Da Vinci Street and South of the programmed building spaces constructed as a part of Phase 5 will be developed in this Phase of the Work. Construction associated with Phase 8 will incorporate building areas that address the growth projected for the next 10, 20, and 30 years. Programmed spaces included in the Class 'A' Office Building portion of this phase are as follows:
 - a. Class 'A' office space for department directors and key staff members.
 - b. Large break area that will accommodate all personnel north of Da Vinci Street.
 - c. Large locker rooms, showers and restroom areas that will accommodate all personnel north of Da Vinci Street.
 - d. Large multi-purpose meeting room, sized to facilitate a meeting with all staff members working on the North Base campus.
 - e. Space for public greeting, waiting, and meeting.
- 8.2. Building construction types for this front office area will have an appropriate elevated aesthetic due to accommodating the public in this location. Even with the increased appearance, the building will be functional, efficient, and cost effective. Buildings constructed for the above-mentioned portions of phase eight will be conventional-steel framed buildings with an appropriate evaluation of the scope and budget.
- 8.3. EV charging locations along with covered parking will be incorporated into parking plan.

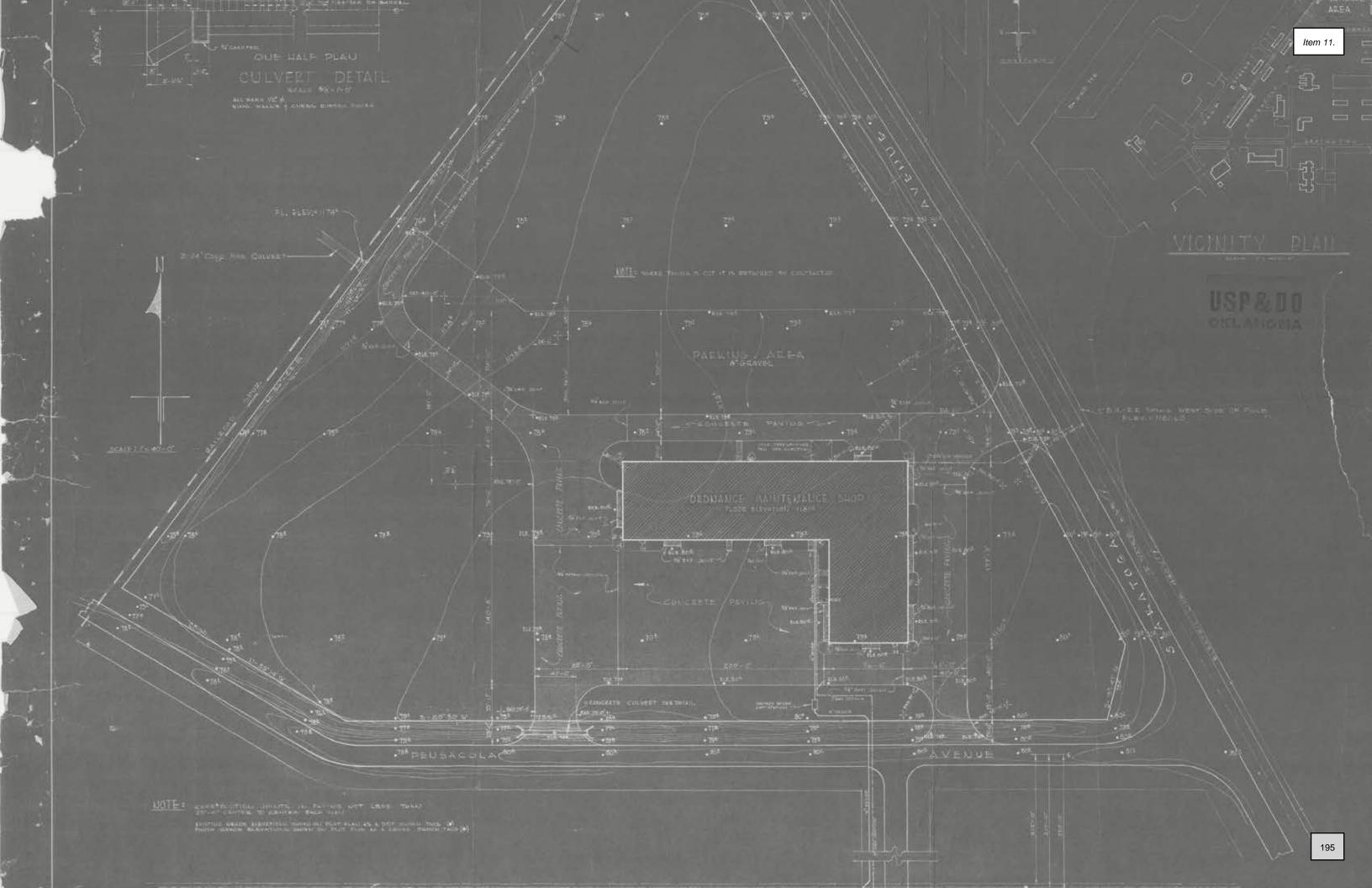
Phase 9: South Facility Development & Parking

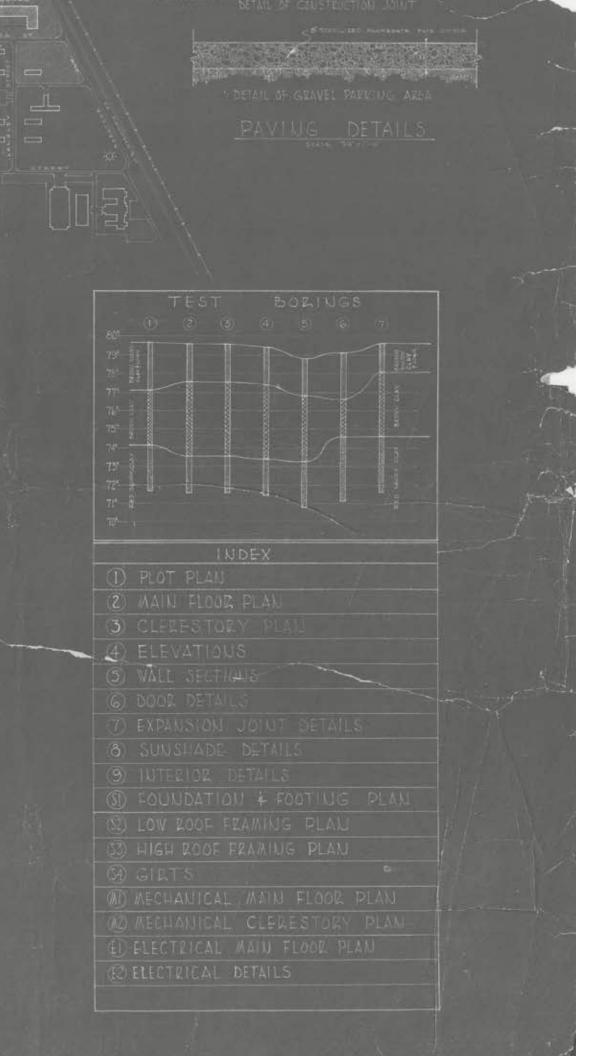
- 9.1. This phase of the work will incorporate various program functions that are specifically designed to eliminate redundant building functions and encourage efficiencies that will reduce the capital requirements needed for this property. Spaces that are intended to be shared, centralized functions include the following:
 - a. Large and substantially apportioned welding bay
 - b. Parts Storage
 - c. Tire Storage
 - d. Bulk Fluids
 - e. Lube Bay
 - f. Managing Office for these functions.
- 9.2. The above-mentioned construction types, specifically behind and concealed by the "front of house" will be functional, efficient, and cost effective. Buildings constructed during this portion of phase nine will be a combination of the following:
 - a. Pre-engineered metal buildings, consistent with the recently constructed Parks and Large Fleet Vehicle Maintenance buildings
 - b. Conventional steel-framed buildings where required by the program or evaluation of the scope and budget.
- 9.3. The existing storm sewer and sanitary sewer lines through the area will need to be maintained and/or removed or relocated, as needed, to accommodate the new facility and maintain the surrounding existing facilities.
- 9.4. The remainder of the overhead electric line can be removed back to North Flood Avenue.
- 9.5. The roof of the proposed facility and covered parking structures are great opportunities to incorporate solar panels.





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SECTION 4 DISCIPLINE NARRATIVES

MECHANICAL + PLUMBING NARRATIVE

HVAC

When it comes to the heating, ventilation, and air-conditioning (HVAC) systems, the campus lends itself to several options. The first decision that needs to be made is if the campus will be served by a Campus-wide System or if each individual building will have its own stand-alone HVAC system. Campus-wide Systems offer more opportunities for energy efficiency but may be harder to scale as future phases are constructed.

Campus Systems

A ground source heat pump system (GSHP), often misnomered "geothermal", is an energy efficient option that could be considered. Each building that is brought online will need a dedicated Mechanical (Pump) Room for pumps and other equipment. The considerable amount of paving planned for the campus give ample locations under which the closed loop well field can be buried. The implication of this option is a higher cost first phase since it will need to include the cost of the well field. An estimate of the sum of future HVAC needs will have to be approximated to size the well filed. Since future phases served by the well field could change significantly between now and when they are constructed, this could mean that the initial estimate of the well filed size will not match the actual need. This may result in additional wells needing to be added later. This will introduce a level of complexity that should be considered when deciding the best HVAC system fit for the campus.

A more scalable campus-wide option is a central chiller/boiler yard with central hydronic pipe headers and a campus loop(s) of chilled water and heated water. An initial chiller and boiler can be sized to accommodate the first phase or two. As future phases of the campus are constructed, additional chiller(s) and boiler(s) can be added providing additional capacity and redundancy. As with the GSHP option above, each building that is brought online will need a dedicated Mechanical (Pump) Room.

Stand-Alone Systems

If Stand-Alone Systems are preferred, packaged roof top units (RTU), split system air handling units (AHU) with outdoor heat pumps (HP), and variable refrigerant flow (VRF) systems might be considered. The components of all of these options are available as commodity items and would allow each building to operate completely independently. These systems are typically easier to maintain than a chiller/boiler system. And, whereas an outage in a Campus System may render the entire campus without heat or cooling, Stand-Alone Systems do not have this disadvantage. But the trade off is often lower efficiencies.

Other Considerations

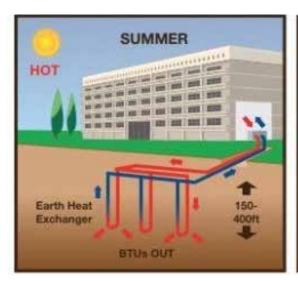
Vehicles with internal combustion engines (ICE) introduce some complexity to the system. ICE vehicles indoors require significant amounts of airflow and air quality monitoring with alarming systems to keep building occupants safe. If ICE vehicles are to be parked indoors while running, a system similar to those installed in fire stations that connect directly to the tailpipe of the vehicle (Plymovent or similar) may be advised. Areas with high amounts of ventilation (like where ICE vehicles are indoors) are prohibited by code from being heated by any means other than radiant heating. Therefore, gas-fired radiant tube heaters will probably be recommended in areas where ICE vehicles are located. If a GSHP system is selected, radiant heated floors should be considered as they will be an additional heat sink and will extend the life of the well field by helping to balance the heating and cooling seasons.

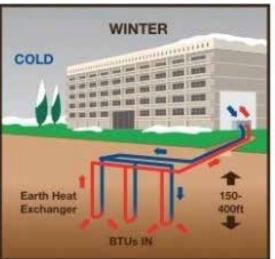
Additional complexity is also added if any of the buildings include allowances for lead-acid battery charging. For example, lead-acid batteries are common at forklift charging stations and uninterruptable power supply (UPS) systems at server rooms. Spacing containing lead-acid battery charging have specific ventilation requirements. Note: Lithium ion or NiMH batteries do not have venting requirements.

If multiple temperature zones are in a single building (i.e. a ventilated and heated space for ICE vehicles next to a fully conditioned office space), insulation will be required between the zones. Higher than typical cost allowances should be made for insulation and air barriers.



CENTRAL CHILLER/BOILER YARD





GROUND SOURCE HEAT PUMP SYSTEM



PACKAGED ROOF TOP UNITS

MECHANICAL + PLUMBING NARRATIVE

Plumbing

Accommodation for a campus-wide domestic cold water (DCW) line may be considered. A Civil Engineer can best explain the pros and cons of a dedicated campus loop with a single tap and meter at the City main versus a tap and meter per building.

Each building will need space for the DCW entry point with accommodation for a back-flow preventer. If irrigation is to be included, accommodation for an additional back-flow preventer should be provided. Given the proximity to a water tower it is possible that each building may also require a pressure reducing device located at the building entry to protect plumbing fixtures. This building DCW entry point can be located in the Janitor's Closet or, if a Campus HVAC System is selected, the Mechanical (Pump) Room.

A dedicated domestic water heater (DWH) per building is probably the optimal arrangement for the campus. Gas-fired with storage, gas-fired instantaneous, electric with storage, or heat pump with storage should be considered. The DWH can be located in the Janitor's Closet or Mechanical (Pump) Room.

If a chiller/boiler Campus System is chosen, strong consideration should be given for a heat pump water heater located in the Mechanical (Pump) Room to utilize excess pump heat for domestic hot water production.

Additionally, if a GSHP systems is chosen for the HVAC system, the DWH could be tied into that system. That configuration would provide energy efficient domestic hot water production and extend the life of the GSHP well field by providing an additional heat sink to help balance the seasons.

Early consideration should be given to locate a campus storm drain loop during the first phase of the project. This scope would fall under a Civil Engineer.

Fire Sprinkler

Based on occupancy type and size, some buildings on campus will likely require fire suppression. Given the proximity to a water tower it is unlikely that a fire pump will be needed.

Consideration should be given to clean-agent systems in lieu of water systems in server rooms.

Electric Vehicle Charging Stations

Electric Vehicle (EV) charging stations are a great addition to any campus. Cost for installation typically decrease the closer the EV charging stations are located to the main distribution panel (MDP). Cost considerations should be made when locating the EV charging stations.

Locating EV charging stations between parking stalls allows for two (2) EVs to access the charging stations and decreases turnover time.

There are several charging types (i.e. SAE J1772, Tesla, CCS, CHAdeMO) and levels of charging. Since not all vehicles can utilize all charging types, consideration should be made when selecting chargers to accommodate the makes and models of the City fleet and others that will be utilizing the chargers.

- Level 1 chargers (SAE J1772) rely on 120V and are often referred to as "trickle chargers" because they take many hours to a full day to charge an EV.
- Level 2 chargers (SAE J1772, Tesla) rely on 240V and can charge an EV in hours.
- Fast DC Chargers (Tesla, CCS, CHAdeMO) rely on 480V and can charge an EV in under an hour.
- Super Fast DC Chargers rely on 480V and can charge an EV in under 30 minutes.

Commercially available third-party charging companies (Francis EV or similar) will administer paid EV charging stations and may create an additional revenue stream for the City, if located at the CNG fill station at the north end of the site. Additionally, several Tribal Nations are investing in EV charging in Oklahoma. Consideration could be made to partner with a third-party company or a Tribal Nation for Fast DC or Super Fast DC Charger installation.



SOLAR PANELS WITH EV CHARGING



EV CHARGING STATIONS

Energy Efficiencies

Energy efficient campuses require a multifaceted approach. Designing to the most recent International Energy Conservation Code is a great guide to do that. It will prescribe appropriate building envelope requirements including amounts of insulation, efficiency of lighting, and efficiency of HVAC systems.

HVAC systems consume the plurality of building energy. In Oklahoma, the cooling season (summer) slightly dominates over the heating season (winter). A huge step towards energy efficiency is decreasing the cooling and heating loads. This first way to decrease HVAC system demand is by constructing an energy efficient building with appropriate insulation and light in color. Since Oklahoma is cooling season dominated, a lighter building/roof will consume less energy over a year than an identical building that is medium or dark in color.

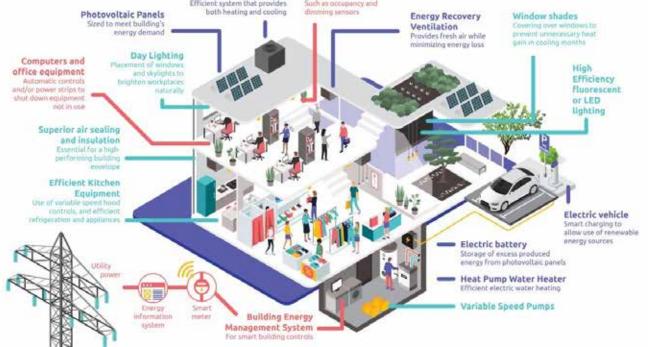
Mechanical equipment efficiency is quantified by SEER (Seasonal Energy Efficiency Ratio) and COP (Coefficient of Performance). The higher the rating, the more energy efficient the equipment. Think: the higher, the better. SEER ratings are used for cooling mode. The number is the ratio of cooling capacity (in BTUs) versus energy required to produce it (in Watts) and the units are in BTU/W. For example, a 3-ton system will remove, nominally, 36,000 BTU of heat. If that piece of equipment is rated at 9 SEER (old equipment), it requires 4,000 W to operate. A 3-ton unit that is rated for 28 SEER (ground-source heat pump) will remove the same amount of heat for 1,285 W of energy. That is one third of the energy. When compounded over a whole year, high-efficiency heat pumps usually see a payback in less than 5 years. Even if ground source heat pumps are not utilized for this project, higher efficiency packaged equipment with SEER ratings at 16 BTU/W and higher are available as commodity products. COP ratings are used for heating mode. The number is the ratio of heating capacity (in Watts) versus energy required to produce it (in Watts). It is a unit-less number or can be expressed in W/W. An electric heater has a COP of 1. A conventional heat pump has a COP of 2-4. A ground source heat pump has a COP of 5. Again, a piece of equipment with a COP of 2 will provide the same amount of heating as a piece of equipment with a COP of 1 for half the cost.

Utilizing energy efficient lighting like LED in lieu of traditional incandescent has been a significant industry shift in the last decade. LED lights have a 25 times longer lifespan (5-10 years) which saves significantly on maintenance costs. They also consume 90% less energy while producing the same light output. All of that wasted energy from traditional incandescent was being turning into heat. Not only do LED lights use less energy, they also contribute less heat to the space that has to be removed by the air conditioning system.

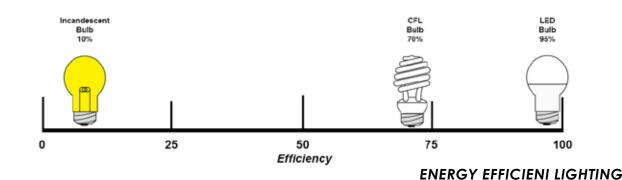
Another great method of increasing a building's energy efficiency is to add solar panels. Solar panels can convert approximately 20% of the sunlight they receive into electricity. A solar panel can produce approximately 200 W per square meter. They have a 20 year lifespan (meaning they will only be about 70% as efficient as new panels at that time). For maximum energy generation, solar panels should be mounted at an angle equal to the latitude of their installation. In Norman, Oklahoma, solar panels should be mounted at 35° facing south. In addition to energy consumption, solar panels provide shade. When mounted on a building roof, they will decrease the amount of heat that reaches the space which will decrease the air conditioning load. They are also a great option to provide shade as covered parking. Batteries can be paired with a solar panel array to provide energy when no sunlight is available. A battery and inverter systems is about \$200/kWh. Grants for municipalities are available through the Department of Energy (DOE). Refer to https://www.energy.gov/eere/solar/funding-opportunities for resources.

The State of Oklahoma offers grants and loans to municipalities. Information can be found at the following website: https://www.okcommerce.gov/community-development/local-governments-edos/energy-efficiency-grants-loans/.

The DOE offers additional funding sources here: https://www.grants.gov/learn-grants/grant-making-agencies/department-of-energy.html



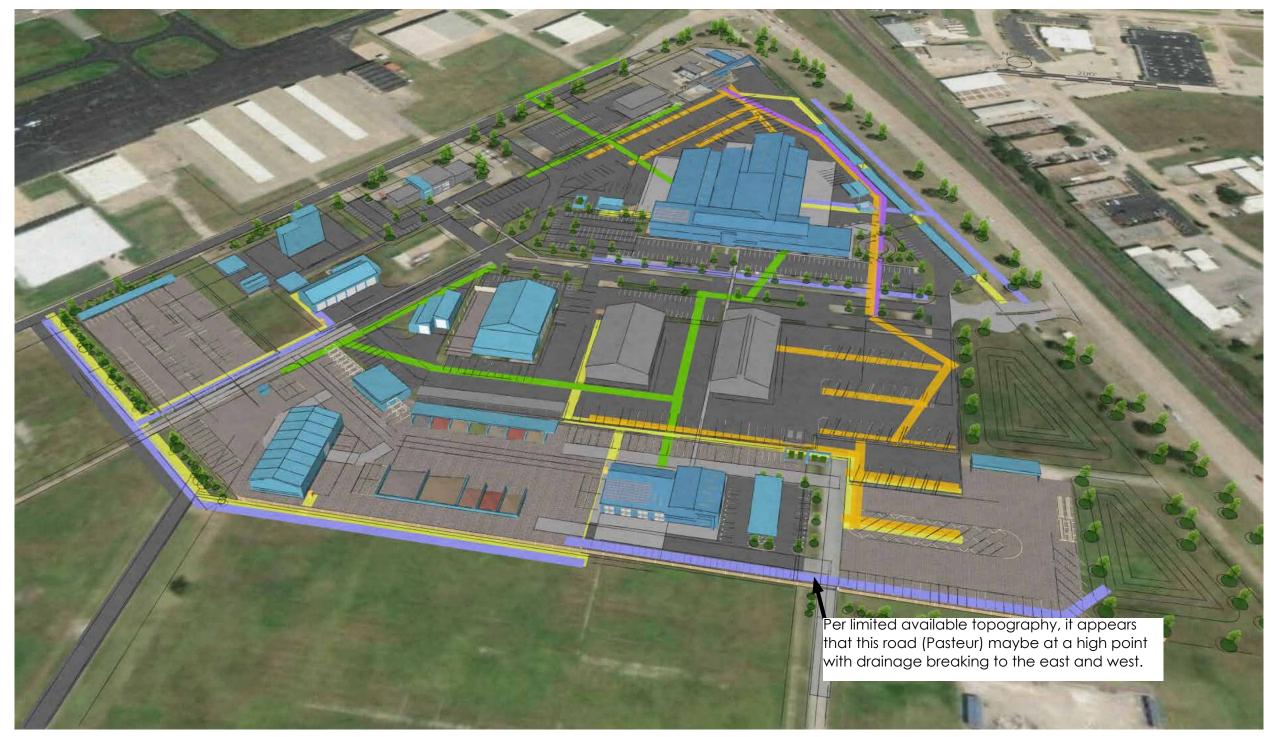
ENERGY EFFICIENT SYSTEMS





SOLAR PANELS ON LIGHT-COLOR RO

NORTH BASE MASTER PLAN I NORMAN, OKLAHOMA



Existing storm sewer appears to be able to remain in place per current conceptual plans and limited grade changes.

Existing sanitary sewer to be removed and relocated as needed.

Existing water to be removed and relocated as needed.

Existing CNG and communications lines to remain in place.

Existing CNG and communicaions to be removed and relocated as needed.

LEGEND

Fiber

CNG

Electricity

Server

Water





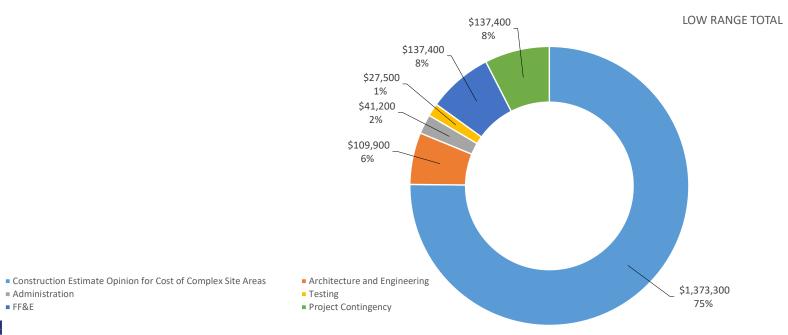
SECTION 5 OPINION OF PROBABLE COST

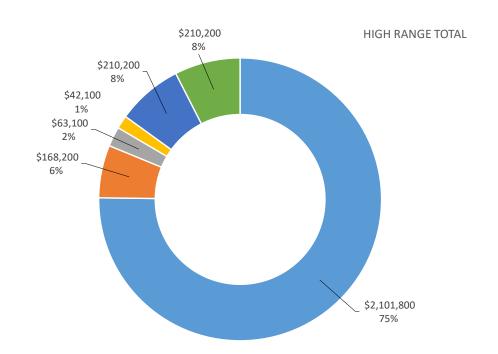
MASTER PLAN SUMMARY COST ESTIMATE, TABLE 0

Please Note: Prices shown in 2022 dollars.

ITEM ID	CATEGORY	ITEM	QTY	UNIT	RANGE	LOW RANGE, TOTAL	HIGH RANGE, TOTAL
0.1	Area A	Total Construction Estimate				\$ 43,382,000	\$ 60,633,400
0.2	Areas B + C	Total Construction Estimate				\$ 12,469,300	\$ 18,669,900
0.3	Area D	Total Construction Estimate				\$ 4,840,000	\$ 6,357,900
0.4	Site + Site Utilities	New Roads - Concrete	5,770	SY	\$75 - \$95	\$ 432,800	\$ 548,200
0.5	Site + Site Utilities	Sidewalks	3,260	SF	\$5.75 - \$6.25	\$ 18,800	\$ 20,400
0.6	Site + Site Utilities	Handicap Entrance - Sidewalks	10	EA	\$850 - \$1000	\$ 8,500	\$ 10,000
0.7	Site + Site Utilities	Dentention Pond, Excavation	2,079	SY	\$5 - \$7	\$ 10,400	\$ 14,600
0.8	Site + Site Utilities	Dentention Pond, Concrete Trickle Channel - 5'	1,530	LF	\$40 - \$48	\$ 61,200	\$ 73,500
0.9	Site + Site Utilities	Dentention Pond, Concrete Outlet Structures	2	EA	\$2600 - \$3500	\$ 5,200	\$ 7,000
0.10	Site + Site Utilities	Electrical Primary (Primary by OG&E) 1200 amp secondary	685	LF	\$600 - \$800	\$ 411,000	\$ 548,000
0.11	Site + Site Utilities	Ex. ~1200 amp service panel, 100' ditch, pipe, and wire	1	LS	\$60000 - \$80000	\$ 60,000	\$ 80,000
0.12	Site + Site Utilities	Generator	2	EA	\$150000 - \$350000	\$ 300,000	\$ 700,000
0.13	Contingency	Construction / Estimating Contingency, Excluding Areas A-D Estimates			5%	\$ 65,400	\$ 100,100
		RANGE TOTALS				\$ 62,064,400	\$ 87,762,700

MASTER PLAN SUMMARY PROJECT BUDGET WITH SOFT COSTS





Administration FF&E

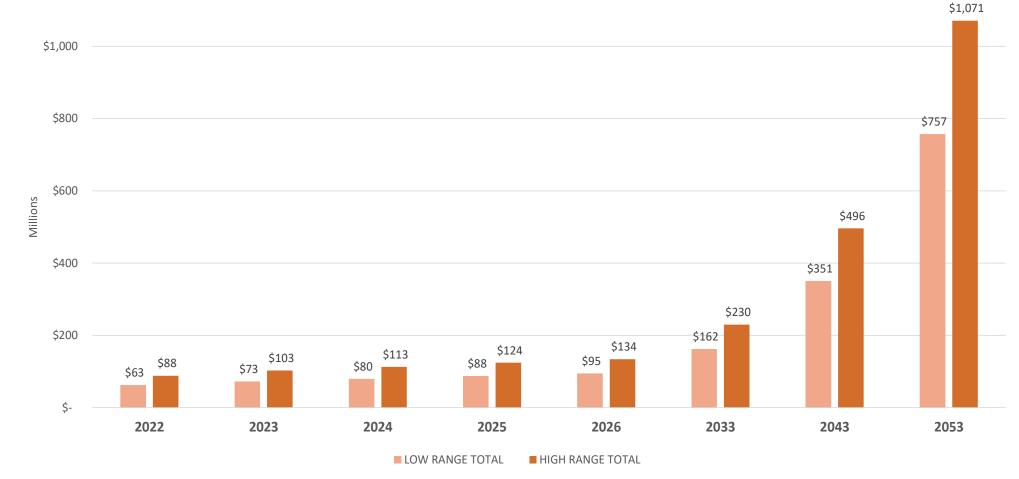
203

ITEM	YEAR	ANNUAL ESCALATION RATE	LOW RANGE TOTAL		HIGH RANGE TOTAL
Construction Estimate Opinion of Cost	2022	-	\$	62,518,000	\$ 88,457,000
Construction Estimate Opinion of Cost	2023	16%	\$	72,520,880	\$ 102,610,120
Construction Estimate Opinion of Cost	2024	10%	\$	79,772,968	\$ 112,871,132
Construction Estimate Opinion of Cost	2025	10%	\$	87,750,265	\$ 124,158,245
Construction Estimate Opinion of Cost	2026	8%	\$	94,770,286	\$ 134,090,905
Construction Estimate Opinion of Cost	2033	8%	\$	162,419,616	\$ 229,808,247
Construction Estimate Opinion of Cost	2043	8%	\$	350,651,769	\$ 496,138,769
Construction Estimate Opinion of Cost	2053	8%	\$	757,030,870	\$ 1,071,126,390

MASTER PLAN SUMMARY COST ESCALATION PROJECTIONS



Please Note: In case of a recession, the annual escalation rate will be reduced to 0%.



AREA A COST ESTIMATE, TABLE A

Please Note: Prices shown in 2022 dollars.

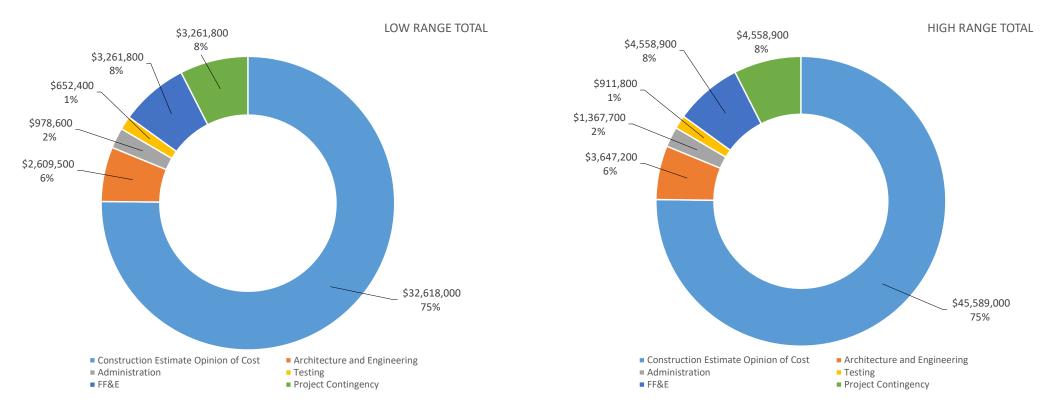
ITEM ID	CATEGORY	ITEM	QTY	UNIT	RANGE, UNIT COST	LOW RANGE,	TOTAL	HIGH RANGE, TOTAL	NOTES
A.1	Demolition	Demo existing paving	28,175	SY	\$30 - \$40	\$ 84	5,300	\$ 1,127,000	
A.2	Demolition	Remove Existing Building, Sanitation	3,200	SF	\$8 - \$12	\$ 2	5,600	\$ 38,400	
A.3	Demolition	Remove Existing Building, Traffic	7,500	SF	\$7 - \$12	\$ 5	2,500	\$ 90,000	
A.4	Demolition	Remove Existing Building, Fleet	29,500	SF	\$6 - \$14	\$ 17	7,000	\$ 413,000	
A.5	Demolition	Demo existing ancillary storage buildings	12,700	SF	\$6 - \$14	\$ 7	6,200	\$ 177,800	
A.6	New Construction	Paving	12,700	SY	\$38 - \$45	\$ 48	2,600	\$ 571,500	
A.7	New Construction	Install New Concrete Curb and Gutter - 6"	5,265	LF	\$16 - \$22	\$ 8	4,300	\$ 115,900	
A.8	New Construction	New Class A Office Space, Conventional Framed	54,795	SF	\$325 - \$400	\$ 17,80	8,400	\$ 21,918,000	High range shown in total
A.9	New Construction	New Class A Office Space, Tilt Up	54,795	SF	\$300 - \$375	\$ 16,43	8,500	\$ 20,548,200	Low range shown in total
A.10	New Construction	New Class A Office Space, Pre-Engineered	54,795	SF	\$280 - \$345	\$ 15,34	2,600	\$ 18,904,300	
A.11	New Construction	New Maintenance Building Space - No Crane, Conventional Framed	64,825	SF	\$245 - \$275	\$ 15,88	2,200	\$ 17,826,900	
A.12	New Construction	New Maintenance Building Space - No Crane, Tilt Up	64,825	SF	\$225 - \$300	\$ 14,58	5,700	\$ 19,447,500	High range shown in total
A.13	New Construction	New Maintenance Building Space - No Crane, Pre-Engineered	64,825	SF	\$180 - \$225	\$ 11,66	8,500	\$ 14,585,700	Low range shown in total
A.14	Site + Site Utilities	Install Slab Sod	45,000	SF	\$0.65 - \$0.8	\$ 2	9,300	\$ 36,000	
A.15	Site + Site Utilities	Install Irrigation	45,000	SF	\$1 - \$1.35	\$ 4	5,000	\$ 60,800	
A.16	Site + Site Utilities	Install New Trees	60	EA	\$400 - \$800	\$ 2	4,000	\$ 48,000	
A.17	Site + Site Utilities	Install New Landscaping	1,500	EA	\$7 - \$9	\$ 1	0,500	\$ 13,500	
A.18	Site + Site Utilities	Covered Parking Structures	80	EA	\$125 - \$175	\$ 1	0,000	\$ 14,000	
A.19	Site + Site Utilities	EV Parking	5	EA	\$25000 - \$40000	\$ 12	5,000	\$ 200,000	
A.20	Site + Site Utilities	Install New Perimeter Fencing, Functional	2,750	LF	\$22 - \$32	\$ 6	0,500	\$ 88,000	
A.21	Site + Site Utilities	Install New Perimeter Fencing, Preminum	2,750	LF	\$42 - \$62	\$ 11	5,500	\$ 170,500	
A.22	Site + Site Utilities	Install New Perimeter Fencing, Secured Entry Points	2	EA	\$28000 - \$35000	\$ 5	6,000	\$ 70,000	
A.23	Site + Site Utilities	Install Parking Lot Lighting	50	EA	\$16000 - \$20000	\$ 80	0,000	\$ 1,000,000	Quantity based on general recommendation of 60' between light fixtures for ample lighting levels
A.24	Site + Site Utilities	Dumpster Enclosures	2	EA	\$20000 - \$30000	\$ 4	0,000	\$ 60,000	
A.25	Site + Site Utilities	Vehicle Low Volume Natural Gas	760	LF	\$18 - \$22	\$ 1	3,700	\$ 16,800	
A.26	Contingency	Construction / Estimating Contingency			5%	\$ 1,55	3,300	\$ 2,275,300	

32,618,000 \$

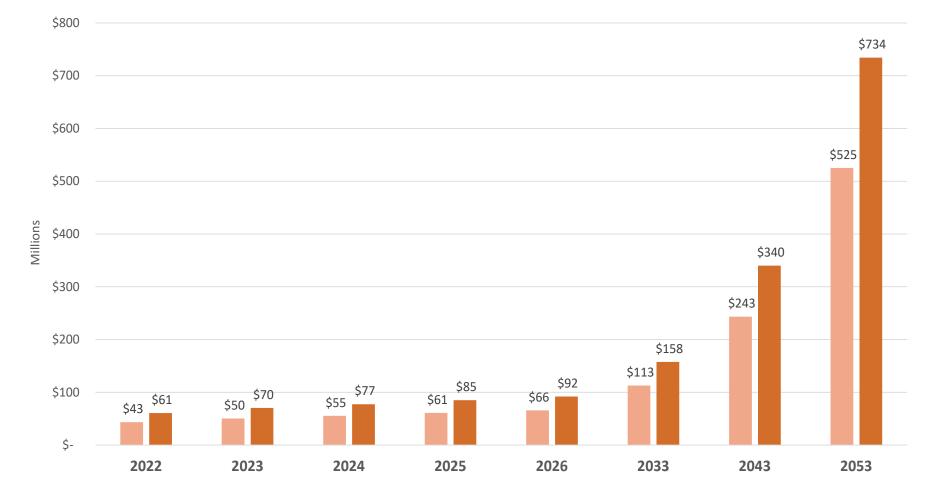
45,589,000



AREA A PROJECT BUDGET WITH SOFT COSTS



AREA A COST ESCALATION PROJECTIONS



Please Note: In case of a recession, the annual escalation rate will be reduced to 0%.



AREAS B + C COST ESTIMATE, TABLE BC

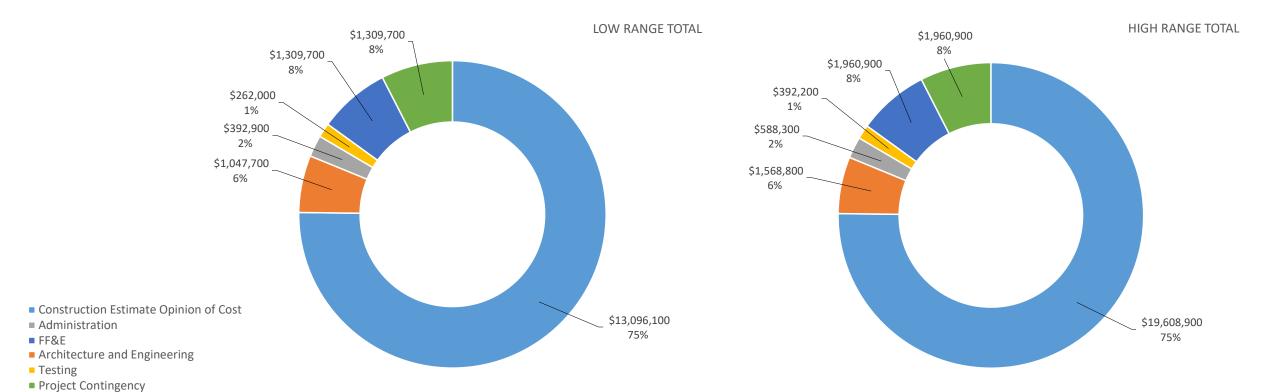
Please Note: Prices shown in 2022 dollars.

ITEM ID	CATEGORY	ITEM	QTY	UNIT	RANGE, UNIT COST	L	LOW RANGE, TOTAL	HIGH RANGE, TOTAL	NOTES
BC.1	New Construction	New construction: paving	47,510	SY	\$38 - \$45	\$	1,805,400	\$ 2,138,000	
BC.2	New Construction	Install New Concrete Curb and Gutter - 6"	3,750	LF	\$16 - \$22	\$	60,000	\$ 82,500	
BC.3	New Construction	Gravel 1" with fines for compaction	1,890	SY	\$14 - \$18	\$	26,500	\$ 34,100	
BC.4	New Construction	New Maintenance Building Space - No Crane, Conventional Framed	17,960	SF	\$245 - \$275	\$	4,400,200	\$ 4,939,000	
BC.5	New Construction	New Maintenance Building Space - No Crane, Tilt Up	17,960	SF	\$225 - \$300	\$	4,041,000	\$ 5,388,000	High range shown in total
BC.6	New Construction	New Maintenance Building Space - No Crane, Pre- Engineered	17,960	SF	\$180 - \$225	\$	3,232,800	\$ 4,041,000	Low range shown in total
BC.7	New Construction	New Salt Barn, Concrete Push Wall with PEMB	12,160	SF	\$150 - \$175	\$	1,824,000	\$ 2,128,000	
BC.8	New Construction	New Salt Barn, Concrete Push Wall with Fabric	12,160	SF	\$125 - \$150	\$	1,520,000	\$ 1,824,000	Shown in total
BC.9	New Construction	Covered Bulk Storage and Shed, Building Type 1	29,580	SF	\$135 - \$200	\$	3,993,300	\$ 5,916,000	Low range shown in total
BC.10	New Construction	Covered Bulk Storage and Shed, Building Type 2	29,580	SF	\$150 - \$225	\$	4,437,000	\$ 6,655,500	High range shown in total
BC.11	Site + Site Utilities	Sitework Allowance	95,000	СҮ	\$8 - \$12	\$	760,000	\$ 1,140,000	Assuming 2' delta for purposes of bidding
BC.12	Site + Site Utilities	Install Slab Sod	29,160	SF	\$0.65 - \$0.8	\$	19,000	\$ 23,400	
BC.13	Site + Site Utilities	Install Irrigation	29,160	SF	\$1 - \$1.35	\$	29,200	\$ 39,400	
BC.14	Site + Site Utilities	40' Landscape Buffer	1	EA	\$120000 - \$140000	\$	120,000	\$ 140,000	
BC.15	Site + Site Utilities	Install New Trees	110	EA	\$400 - \$800	\$	44,000	\$ 88,000	
BC.16	Site + Site Utilities	Covered Parking Structures	24	EA	\$125 - \$175	\$	3,000	\$ 4,200	Quantity shown is parking spaces
BC.17	Site + Site Utilities	EV Parking	3	EA	\$25000 - \$40000	\$	75,000	\$ 120,000	
BC.18	Site + Site Utilities	Sight-Proof Fence	1,950	LF	\$32 - \$40	\$	62,400	\$ 78,000	
BC.19	Site + Site Utilities	Install New Perimeter Fencing, Functional	1,725	LF	\$22 - \$32	\$	38,000	\$ 55,200	Shown in total
BC.20	Site + Site Utilities	Install New Perimeter Fencing, Preminum	1,725	LF	\$42 - \$62	\$	72,500	\$ 107,000	
BC.21	Site + Site Utilities	Install New Perimeter Fencing, Secured Entry Points	3	EA	\$28000 - \$35000	\$	84,000	\$ 105,000	
BC.22	Site + Site Utilities	Install Parking Lot Lighting	35	EA	\$16000 - \$20000	\$	560,000	\$ 700,000	Quantity based on general recommendation of 60' between light fixtures for ample lighting levels
BC.23	Site + Site Utilities	Dumpster Enclosures	2	EA	\$20000 - \$30000	\$	40,000	\$ 60,000	
BC.24	Contingency	Construction / Estimating Contingency			5%	\$	623,700	\$ 933,800	
		PANGE TOTALS					12 006 100	\$ 10 608 000	

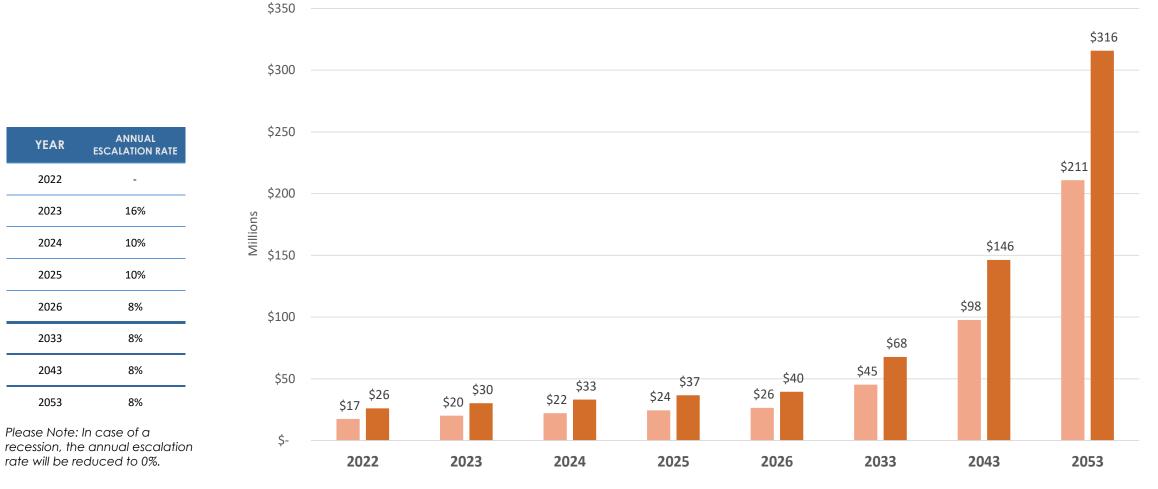
207

RANGE TOTALS \$ 13,096,100 \$ 19,608,900

AREAS B + C PROJECT BUDGET WITH SOFT COSTS



AREAS B + C COST ESCALATION PROJECTIONS





YEAR

2022

2023

2024

2025

2026

2033

2043

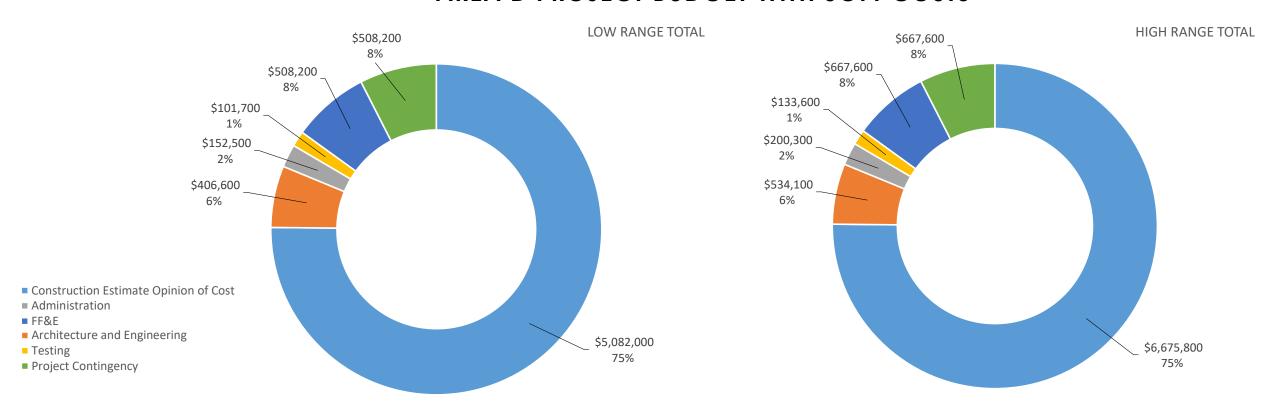
2053

AREA D COST ESTIMATE, TABLE D

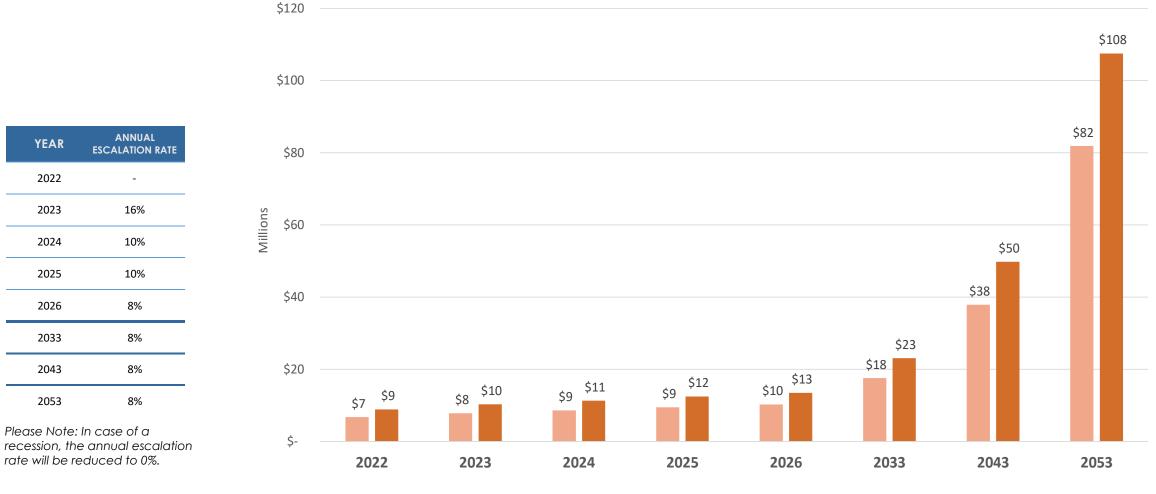
Please Note: Prices shown in 2022 dollars.

ITEM ID	CATEGORY	ITEM	QTY	UNIT	RANGE	l	LOW RANGE, TOTAL	HIGH RANGE, TOTAL	NOTES
D.1	Demolition	Demo existing paving	250	SY	\$30 - \$40	\$	7,500	\$ 10,000	
D.2	Demolition	Demo Existing Buildings (sf range)	1,060	SF	\$8 - \$12	\$	8,500	\$ 12,800	
D.3	New Construction	Paving	15,386	SY	\$38 - \$45	\$	584,700	\$ 692,400	
D.4	New Construction	Install New Concrete Curb and Gutter - 6"	1,625	LF	\$16 - \$22	\$	26,000	\$ 35,800	
D.5	New Construction	New Class A Office Space, Conventional Framed	8,800	SF	\$325 - \$400	\$	2,860,000	\$ 3,520,000	Shown in total
D.6	New Construction	New Class A Office Space, Tilt Up	8,800	SF	\$300 - \$375	\$	2,640,000	\$ 3,300,000	
D.7	New Construction	New Class A Office Space, Pre-Engineered	8,800	SF	\$280 - \$345	\$	2,464,000	\$ 3,036,000	
D.8	New Construction	New Maintenance Building Space - No Crane, Conventional Framed	4,184	SF	\$245 - \$275	\$	1,025,100	\$ 1,150,600	
D.9	New Construction	New Maintenance Building Space - No Crane, Tilt Up	4,184	SF	\$225 - \$300	\$	941,400	\$ 1,255,200	
D.10	New Construction	New Maintenance Building Space - No Crane, Pre-Engineered	4,184	SF	\$180 - \$225	\$	753,200	\$ 941,400	Shown in total
D.11	New Construction	New Fire Tower	1	EA	\$500000 - \$1000000	\$	500,000	\$ 1,000,000	Typical Class A Live Fire Training Structure
D.12	Site + Site Utilities	Install Slab Sod	38,861	SF	\$0.65 - \$0.8	\$	25,300	\$ 31,100	
D.13	Site + Site Utilities	Install Irrigation	38,861	SF	\$1 - \$1.35	\$	38,900	\$ 52,500	
D.14	Site + Site Utilities	Install New Trees	40	EA	\$400 - \$800	\$	16,000	\$ 32,000	
D.15	Site + Site Utilities	Dumpster Enclosure	1	EA	\$20000 - \$30000	\$	20,000	\$ 30,000	
D.16	Contingency	Construction / Estimating Contingency			5%	\$	242,000	\$ 317,900	
		RANGED TOTAL				\$	5,082,000	\$ 6,675,800	

AREA D PROJECT BUDGET WITH SOFT COSTS



AREA D COST ESCALATION PROJECTIONS



Item 11.

PHASE 1 COST ESTIMATE SUMMARY

Please Note: Prices shown in 2022 dollars.

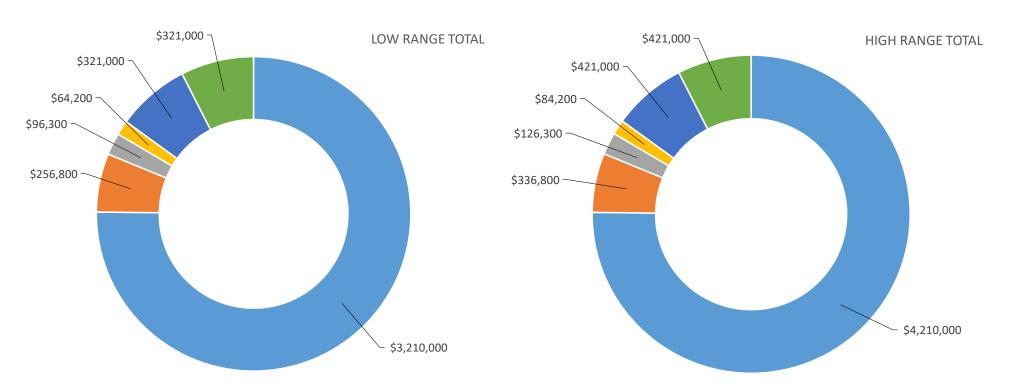
ITEM ID	CATEGORY	ITEM	QTY	UNIT	RANGE	LOW	RANGE, TOTAL	HIGH RANGE, TOTAL
1.1	Demolition	Demo existing paving	28,175	SY	\$30 - \$40	\$	845,300 \$	1,127,000
1.2	Demolition	Remove Existing Building, Sanitation	3,200	SF	\$8 - \$12	\$	25,600 \$	38,400
1.3	New Construction	Paving	12,700	SY	\$38 - \$45	\$	482,600 \$	571,500
1.4	New Construction	Install New Concrete Curb and Gutter - 6"	5,265	LF	\$16 - \$22	\$	84,300 \$	115,900
1.5	Site + Site Utilities	New Roads - Concrete	5,250	SY	\$75 - \$95	\$	393,800 \$	498,800
1.6	Site + Site Utilities	Covered Parking Structures	80	EA	\$2750 - \$3500	\$	220,000 \$	280,000
1.7	Site + Site Utilities	EV Parking	3	EA	\$25000 - \$40000	\$	75,000 \$	120,000
1.8	Site + Site Utilities	Install New Perimeter Fencing, Functional	2,750	LF	\$22 - \$32	\$	60,500 \$	88,000
1.9	Site + Site Utilities	Install New Perimeter Fencing, Preminum	2,750	LF	\$42 - \$62	\$	115,500 \$	170,500
1.10	Site + Site Utilities	Install New Perimeter Fencing, Secured Entry Points	2	EA	\$28000 - \$35000	\$	56,000 \$	70,000
1.11	Site + Site Utilities	Install Parking Lot Lighting	50	EA	\$16000 - \$20000	\$	800,000 \$	1,000,000
1.12	Site + Site Utilities	Vehicle Low Volume Natural Gas	760	LF	\$18 - \$22	\$	13,700 \$	16,800
1.13	Contingency	Construction / Estimating Contingency			5%	\$	152,900 \$	200,500
		RANGE TOTALS				\$	3,210,000 \$	4,210,000



PHASE 1 PROJECT BUDGET WITH SOFT COSTS

BUDGET CATEGORY	% OF BUDGET
Construction Estimate Opinion of Cost	
Architecture and Engineering	8%
Administration	3%
Testing	2%
FF&E	10%
Project Contingency	10%

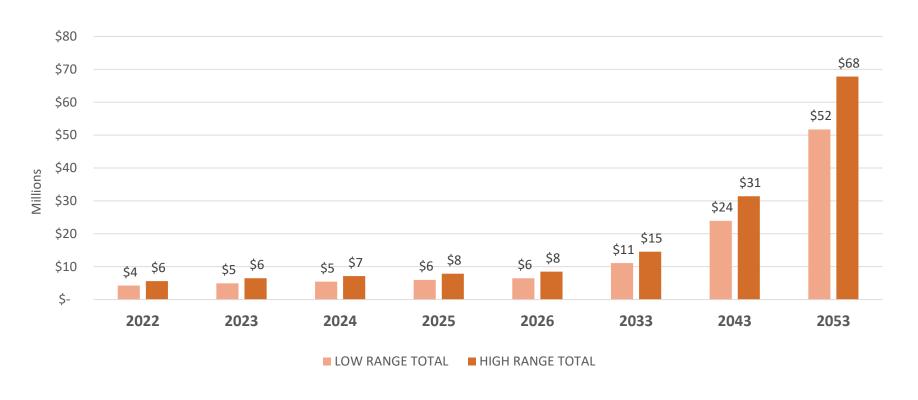
- Construction Estimate Opinion of Cost
- Administration
- FF&E
- Architecture and Engineering
- Testing
- Project Contingency



PHASE 1 COST ESCALATION PROJECTIONS

YEAR	ANNUAL ESCALATION RATE
2022	-
2023	16%
2024	10%
2025	10%
2026	8%
2033	8%
2043	8%
2053	8%

Please Note: In case of a recession, the annual escalation rate will be reduced to 0%.



PHASE 2 COST ESTIMATE SUMMARY

Item 11.

Please Note: Prices shown in 2022 dollars.

ITEM ID	CATEGORY	ITEM	QTY	UNIT	RANGE	LOW	RANGE, TOTAL	HIGH RANGE, TOTAL
2.1	Site + Site Utilities	Electrical Primary (Primary by OG&E) 1200 amp secondary	700	LF	\$600 - \$800	\$	420,000 \$	560,000
2.2	Site + Site Utilities	Ex. ~1200 amp service panel, 100' ditch, pipe, and wire	1	LS	\$60000 - \$80000	\$	60,000 \$	80,000
2.3	Contingency	Construction / Estimating Contingency, Excluding Areas A-D Estimates			5%	\$	24,000 \$	32,000
		RANGE TOTALS				\$	504,000 \$	672,000

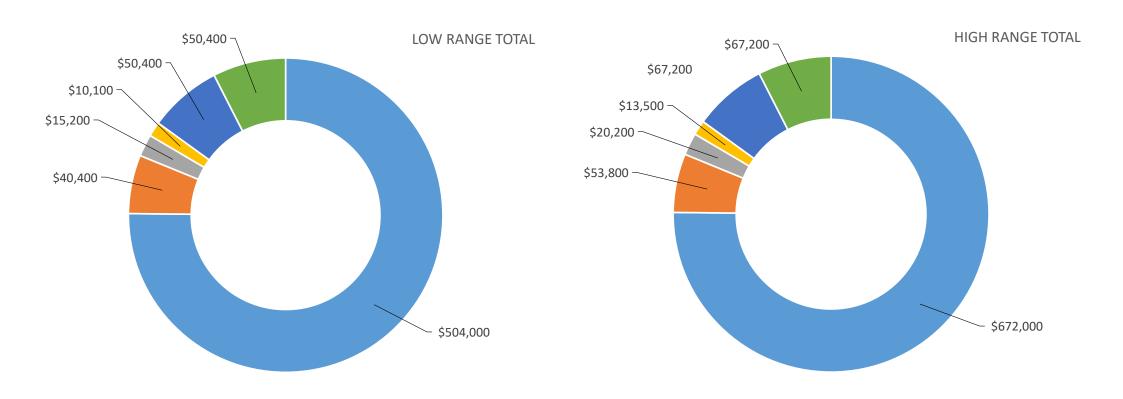


Item 11.

PHASE 2 PROJECT BUDGET WITH SOFT COSTS

BUDGET CATEGORY	% OF BUDGET
Construction Estimate Opinion of Cost	
Architecture and Engineering	8%
Administration	3%
Testing	2%
FF&E	10%
Project Contingency	10%

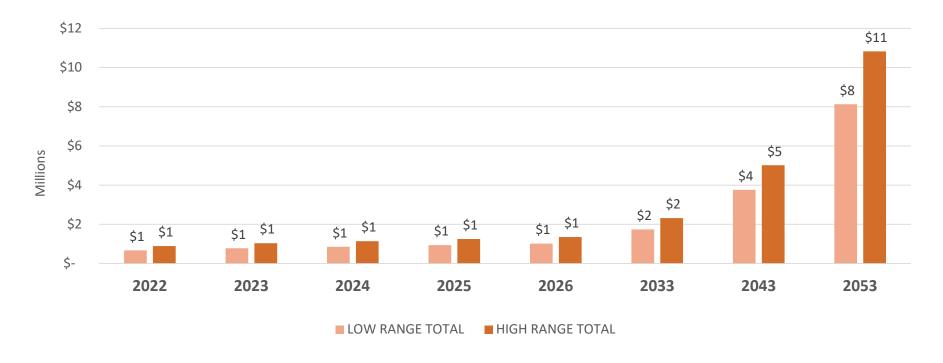
- Construction Estimate Opinion of Cost
- Administration
- FF&E
- Architecture and Engineering
- Testing
- Project Contingency



ANNUAL YEAR **ESCALATION RATE** 2022 2023 16% 2024 10% 2025 10% 2026 8% 8% 2033 2043 8% 8% 2053

Please Note: In case of a recession, the annual escalation rate will be reduced to 0%.

PHASE 2 COST ESCALATION PROJECTIONS





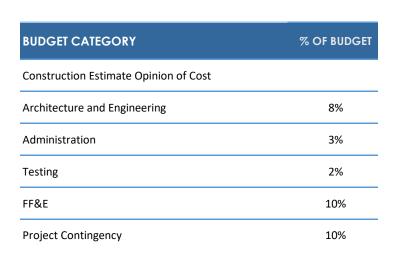
PHASE 3 COST ESTIMATE SUMMARY

Please Note: Prices shown in 2022 dollars.

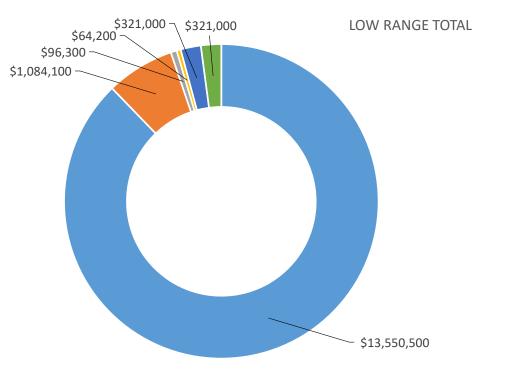
ITEM ID	CATEGORY	ITEM	QTY	UNIT	RANGE	L	OW RANGE, TOTAL	HIGH RANGE, TOTAL	NOTES
3.1	New Construction	New construction: paving	47,510	SY	\$38 - \$45	\$	1,805,400	\$ 2,138,000	
3.2	New Construction	Install New Concrete Curb and Gutter - 6"	3,750	LF	\$16 - \$22	\$	60,000	\$ 82,500	
3.3	Site + Site Utilities	New Roads - Concrete	5,770	SY	\$75 - \$95	\$	432,800	\$ 548,200	
3.4	New Construction	Gravel 1" with fines for compaction	1,890	SY	\$14 - \$18	\$	26,500	\$ 34,100	
3.5	New Construction	New Maintenance Building Space - No Crane, Conventional Framed	17,960	SF	\$245 - \$275	\$	4,400,200	\$ 4,939,000	
3.6	New Construction	New Maintenance Building Space - No Crane, Tilt Up	17,960	SF	\$225 - \$300	\$	4,041,000	\$ 5,388,000	High range shown in total
3.7	New Construction	New Maintenance Building Space - No Crane, Pre-Engineered	17,960	SF	\$180 - \$225	\$	3,232,800	\$ 4,041,000	Low range shown in total
3.8	New Construction	New Salt Barn, Concrete Push Wall with PEMB	12,160	SF	\$150 - \$175	\$	1,824,000	\$ 2,128,000	
3.9	New Construction	New Salt Barn, Concrete Push Wall with Fabric	12,160	SF	\$125 - \$150	\$	1,520,000	\$ 1,824,000	Shown in total
3.1	New Construction	Covered Bulk Storage and Shed, Building Type 1	29,580	SF	\$135 - \$200	\$	3,993,300	\$ 5,916,000	Low range shown in total
3.11	New Construction	Covered Bulk Storage and Shed, Building Type 2	29,580	SF	\$150 - \$225	\$	4,437,000	\$ 6,655,500	High range shown in total
3.12	Site + Site Utilities	Sitework Allowance	95,000	CY	\$8 - \$12	\$	760,000	\$ 1,140,000	Assuming 2' delta for purposes of bidding
3.13	Site + Site Utilities	Install Slab Sod	29,160	SF	\$0.65 - \$0.8	\$	19,000	\$ 23,400	
3.14	Site + Site Utilities	Install Irrigation	29,160	SF	\$1 - \$1.35	\$	29,200	\$ 39,400	
3.15	Site + Site Utilities	40' Landscape Buffer	1	EA	\$120000 - \$140000	\$	120,000	\$ 140,000	
3.16	Site + Site Utilities	Install New Trees	110	EA	\$400 - \$800	\$	44,000	\$ 88,000	
3.17	Site + Site Utilities	Covered Parking Structures	24	EA	\$125 - \$175	\$	3,000	\$ 4,200	Does not include solar panel on roof in estimate
3.18	Site + Site Utilities	EV Parking	3	EA	\$25000 - \$40000	\$	75,000	\$ 120,000	
3.19	Site + Site Utilities	Sight-Proof Fence	1,950	LF	\$32 - \$40	\$	62,400	\$ 78,000	
3.20	Site + Site Utilities	Install New Perimeter Fencing, Functional	1,725	LF	\$22 - \$32	\$	38,000	\$ 55,200	Shown in total
3.21	Site + Site Utilities	Install New Perimeter Fencing, Preminum	1,725	LF	\$42 - \$62	\$	72,500	\$ 107,000	
3.22	Site + Site Utilities	Install New Perimeter Fencing, Secured Entry Points	3	EA	\$28000 - \$35000	\$	84,000	\$ 105,000	
3.23	Site + Site Utilities	Install Parking Lot Lighting	35	EA	\$16000 - \$20000	\$	560,000	\$ 700,000	Quantity based on general recommendation of 60' between light
3.24	Site + Site Utilities	Dumpster Enclosures	2	EA	\$20000 - \$30000	\$	40,000	\$ 60,000	<u> </u>
3.25	Contingency	Construction / Estimating Contingency			5%	\$	645,300	\$ 961,200	
		RANGE TOTALS				\$	13,550,500	\$ 20,184,400	

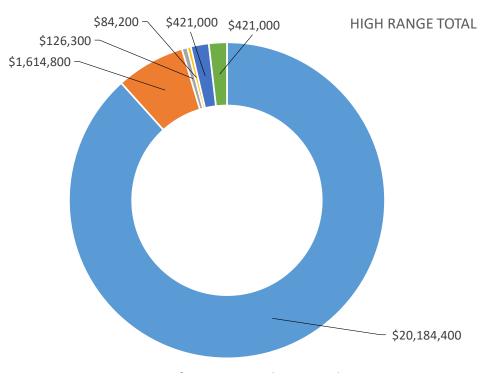
Item 11.

PHASE 3 PROJECT BUDGET WITH SOFT COSTS



- Construction Estimate Opinion of Cost
- Administration
- FF&E
- Architecture and Engineering
- Testing
- Project Contingency



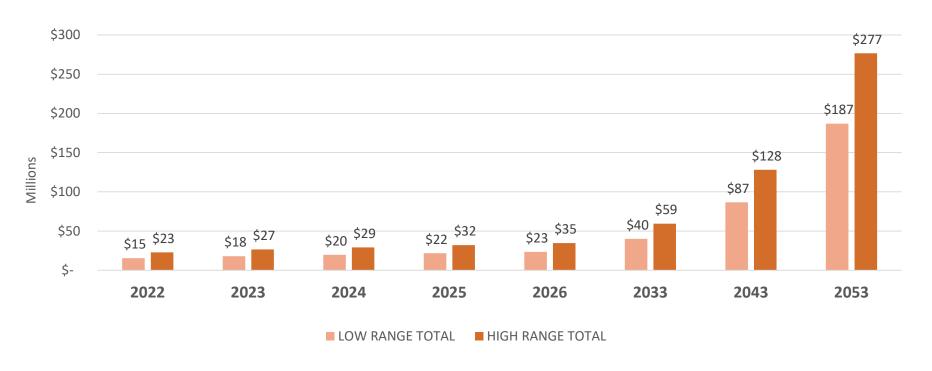




PHASE 3 COST ESCALATION PROJECTIONS

YEAR	ANNUAL ESCALATION RATE
2022	-
2023	16%
2024	10%
2025	10%
2026	8%
2033	8%
2043	8%
2053	8%

Please Note: In case of a recession, the annual escalation rate will be reduced to 0%.



PHASE 4 COST ESTIMATE SUMMARY

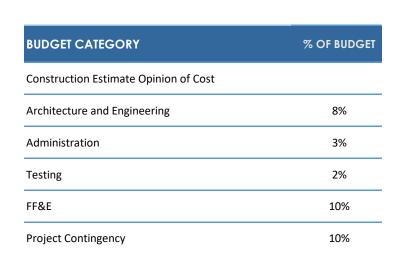
Please Note: Prices shown in 2022 dollars.

ITEM ID	CATEGORY	ITEM	QTY	UNIT	RANGE	LOW RANGE, TOTAL	HIGH RA		NOTES
4.1	Demolition	Demo existing paving	250	SY	\$30 - \$40	\$ 7,500	\$	10,000	
4.2	Demolition	Demo Existing Buildings	1,060	SF	\$8 - \$12	\$ 8,500	\$	12,800	
4.3	New Construction	Paving	15,386	SY	\$38 - \$45	\$ 584,700	\$	692,400	
4.4	New Construction	Install New Concrete Curb and Gutter - 6"	1,625	LF	\$16 - \$22	\$ 26,000	\$	35,800	
4.5	New Construction	New Class A Office Space, Conventional Framed	8,800	SF	\$325 - \$400	\$ 2,860,000	\$ 3	,520,000	Shown in total
4.6	New Construction	New Class A Office Space, Tilt Up	8,800	SF	\$300 - \$375	\$ 2,640,000	\$ 3	,300,000	
4.7	New Construction	New Class A Office Space, Pre-Engineered	8,800	SF	\$280 - \$345	\$ 2,464,000	\$ 3	,036,000	
4.8	New Construction	New Maintenance Building Space - No Crane, Conventional Framed	8,650	SF	\$245 - \$275	\$ 2,119,300	\$ 2	,378,800	
4.9	New Construction	New Maintenance Building Space - No Crane, Tilt Up	8,650	SF	\$225 - \$300	\$ 1,946,300	\$ 2	,595,000	
4.10	New Construction	New Maintenance Building Space - No Crane, Pre-Engineered	8,650	SF	\$180 - \$225	\$ 1,557,000	\$ 1	,946,300	Shown in total
4.11	New Construction	New Fire Tower	1	EA	\$500000 - \$1000000	\$ 500,000	\$ 1	,000,000	Typical Class A Live Fire Training Structure
4.12	Site + Site Utilities	Install Slab Sod	38,861	SF	\$0.65 - \$0.8	\$ 25,300	\$	31,100	
4.13	Site + Site Utilities	Install Irrigation	38,861	SF	\$1 - \$1.35	\$ 38,900	\$	52,500	
4.14	Site + Site Utilities	Install New Trees	40	EA	\$400 - \$800	\$ 16,000	\$	32,000	
4.15	Site + Site Utilities	Dumpster Enclosure	1	EA	\$20000 - \$30000	\$ 20,000	\$	30,000	
4.16	Contingency	Construction / Estimating Contingency			5%	\$ 282,200	\$	368,200	
		RANGED TOTAL				\$ 5,926,000	\$ 7	,730,800	



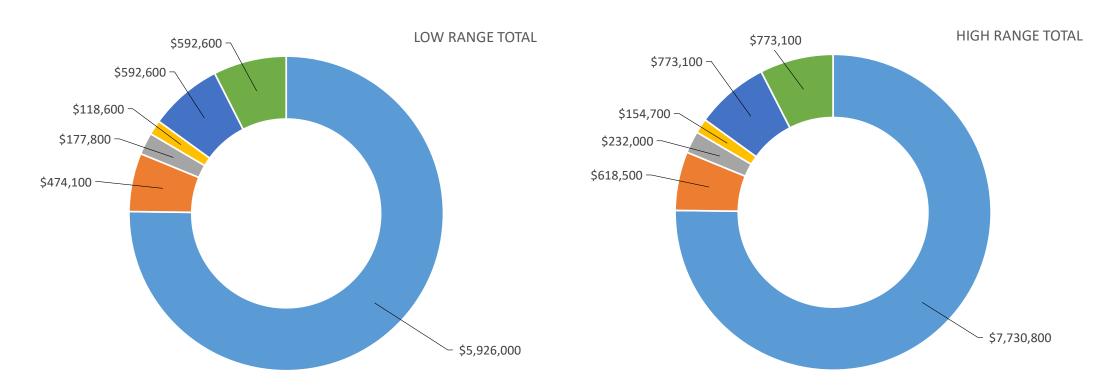
Item 11.

PHASE 4 PROJECT BUDGET WITH SOFT COSTS





- Administration
- FF&E
- Architecture and Engineering
- Testing
- Project Contingency



ANNUAL YEAR **ESCALATION RATE** 2022 16% 2023 2024 10% 2025 10% 2026 8% 2033 8% 8% 2043 8% 2053

Please Note: In case of a recession, the annual escalation rate will be reduced to 0%.

PHASE 4 COST ESCALATION PROJECTIONS





PHASE 5 COST ESTIMATE SUMMARY

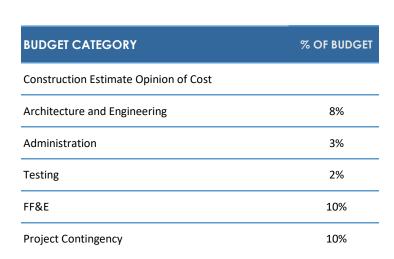
Please Note: Prices shown in 2022 dollars.

ITEM ID	CATEGORY	ITEM	QTY	UNIT	RANGE	LC	OW RANGE, TOTAL	HIGH RANGE, TOTAL	NOTES
5.1	Demolition	Remove Existing Paving, North of Fleet	3,500	SY	\$30 - \$40	\$	105,000	\$ 140,000	
5.2	New Construction	New Maintenance Building Space - No Crane, Conventional Framed	29,100	SF	\$245 - \$275	\$	7,129,500	\$ 8,002,500	
5.3	New Construction	New Maintenance Building Space - No Crane, Tilt Up	29,100	SF	\$225 - \$300	\$	6,547,500	\$ 8,730,000.00	High range shown in total
5.4	New Construction	New Maintenance Building Space - No Crane, Pre-Engineered	29,100	SF	\$180 - \$225	\$	5,238,000	\$ 6,547,500.00	Low range shown in total
5.5	Contingency	Construction / Estimating Contingency			\$ 0.05	\$	267,200	\$ 334,400.00	
		RANGE TOTALS				\$	5,611,000	\$ 9,204,400.00	



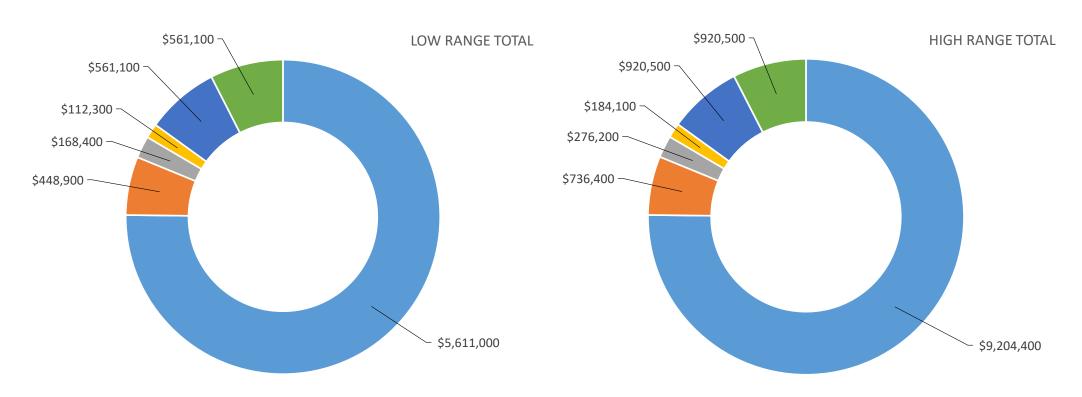
Item 11.

PHASE 5 PROJECT BUDGET WITH SOFT COSTS





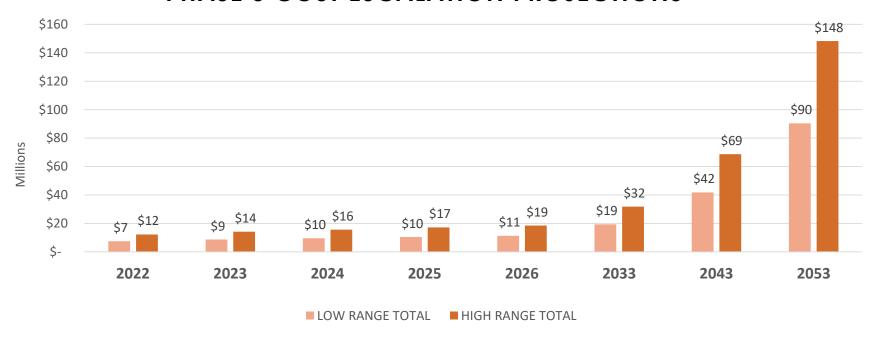
- Administration
- FF&E
- Architecture and Engineering
- Testing
- Project Contingency



YEAR	ANNUAL ESCALATION RATE
2022	-
2023	16%
2024	10%
2025	10%
2026	8%
2033	8%
2043	8%
2053	8%

Please Note: In case of a recession, the annual escalation rate will be reduced to 0%.

PHASE 5 COST ESCALATION PROJECTIONS

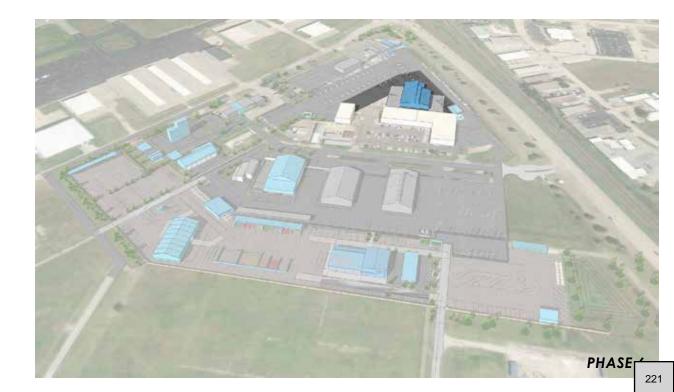




PHASE 6 COST ESTIMATE SUMMARY

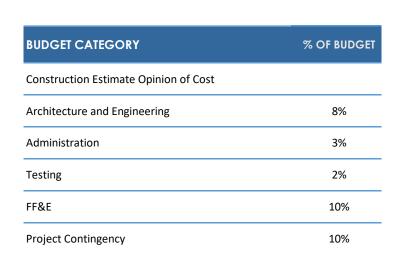
Please Note: Prices shown in 2022 dollars.

ITEM ID	CATEGORY	ITEM	QTY	UNIT	RANGE	l	LOW RANGE, TOTAL	HIGH RANGE, TOTAL	NOTES
6.1	New Construction	New construction: paving	1,265	SY	\$38 - \$45	\$	48,100	\$ 57,000	
6.2	New Construction	Install New Concrete Curb and Gutter - 6"	400	LF	\$16 - \$22	\$	6,400	\$ 82,500	
6.3	New Construction	New Maintenance Building Space - No Crane, Conventional Framed	16,500	SF	\$245 - \$275	\$	4,042,500	\$ 4,939,000	
6.4	New Construction	New Maintenance Building Space - No Crane, Tilt Up	16,500	SF	\$225 - \$300	\$	3,712,500	\$ 5,388,000	High range shown in total
6.5	New Construction	New Maintenance Building Space - No Crane, Pre-Engineered	16,500	SF	\$180 - \$225	\$	2,970,000	\$ 4,041,000	Low range shown in total
6.6	New Construction	Covered Bulk Storage and Shed, Building Type 1	4,400	SF	\$135 - \$200	\$	594,000	\$ 5,916,000	Low range shown in total
6.7	New Construction	Covered Bulk Storage and Shed, Building Type 2	4,400	SF	\$150 - \$225	\$	660,000	\$ 6,655,500	High range shown in total
6.8	Site + Site Utilities	Dumpster Enclosures	1	EA	\$20000 - \$30000	\$	20,000	\$ 60,000	
6.9	Contingency	Construction / Estimating Contingency			5%	\$	182,000	\$ 234,500	
		RANGE TOTALS				\$	7,862,900	\$ 10,807,700	



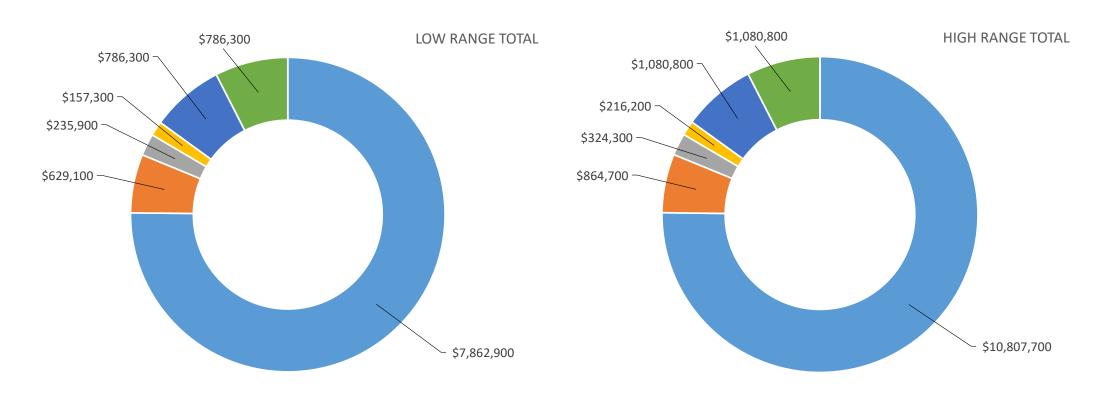
Item 11.

PHASE 6 PROJECT BUDGET WITH SOFT COSTS





- Administration
- FF&E
- Architecture and Engineering
- Testing
- Project Contingency



PHASE 6 COST ESCALATION PROJECTIONS



Please Note: In case of a recession, the annual escalation rate will be reduced to 0%.



PHASE 7 COST ESTIMATE SUMMARY

Please Note: Prices shown in 2022 dollars.

ITEM ID	CATEGORY	ITEM	QTY	UNIT	RANGE	L	OW RANGE, TOTAL	HIGH RANGE, TOTAL	NOTES
7.1	Demolition	Demo of Fleet Building, Line Maintenance Portion	9,100	SF	\$7 - \$12	\$	63,700	\$ 109,200	
7.2	Demolition	Remove Existing Building, Traffic	8,600	SF	\$7 - \$12	\$	60,200	\$ 103,200	
7.3	New Construction	New Maintenance Building Space - No Crane, Conventional Framed	18,000	SF	\$245 - \$275	\$	4,410,000	\$ 4,939,000	
7.4	New Construction	New Maintenance Building Space - No Crane, Tilt Up	18,000	SF	\$225 - \$300	\$	4,050,000	\$ 5,388,000	High range shown in total
7.5	New Construction	New Maintenance Building Space - No Crane, Pre-Engineered	18,000	SF	\$180 - \$225	\$	3,240,000	\$ 4,041,000	Low range shown in total
7.6	Contingency	Construction / Estimating Contingency			5%	\$	168,200	\$ 280,700	
		RANGE TOTALS				\$	3,533,000	\$ 5,894,000	



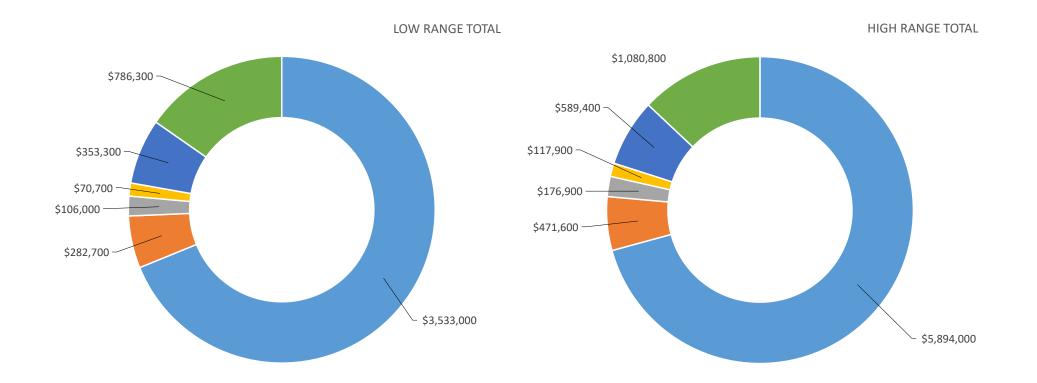
PHASE 7 PROJECT BUDGET WITH SOFT COSTS

BUDGET CATEGORY	% OF BUDGET
Construction Estimate Opinion of Cost	
Architecture and Engineering	8%
Administration	3%
Testing	2%
FF&E	10%
Project Contingency	10%

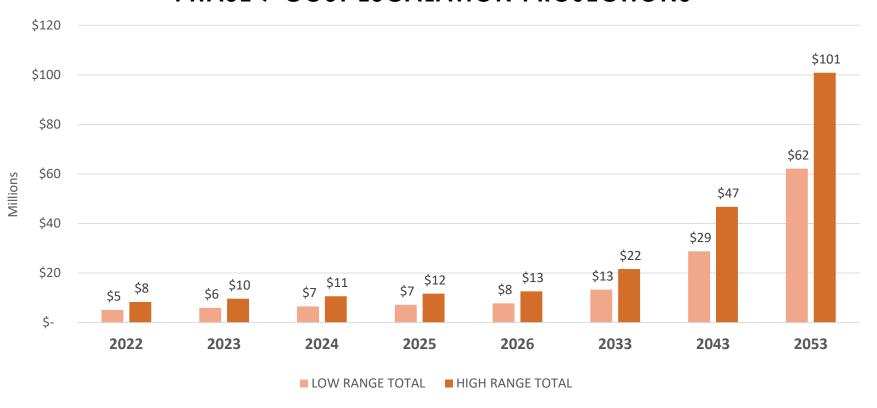
- Construction Estimate Opinion of Cost
- Administration
- FF&E
- Architecture and Engineering
- Testing
- Project Contingency



Please Note: In case of a recession, the annual escalation rate will be reduced to 0%.



PHASE 7 COST ESCALATION PROJECTIONS



PHASE 8 COST ESTIMATE SUMMARY

Please Note: Prices shown in 2022 dollars.

ITEM ID	CATEGORY	ITEM	QTY	UNIT	RANGE	L	.OW RANGE, TOTAL	HIGH RANGE, TOTAL	NOTES
8.1	Demolition	Demo existing paving	7,500	SY	\$30 - \$40	\$	225,000	\$ 300,000	
8.2	Demolition	Demo existing ancillary storage buildings	12,700	SF	\$6 - \$14	\$	76,200	\$ 177,800	
8.3	New Construction	New Class A Office Space, Conventional Framed	30,000	SF	\$325 - \$400	\$	9,750,000	\$ 12,000,000	High range shown in total
8.4	New Construction	New Class A Office Space, Tilt Up	30,000	SF	\$300 - \$375	\$	9,000,000	\$ 11,250,000	Low range shown in total
8.5	New Construction	New Class A Office Space, Pre-Engineered	30,000	SF	\$280 - \$345	\$	8,400,000	\$ 10,350,000	
8.6	Site + Site Utilities	Install Slab Sod	45,000	SF	\$0.65 - \$0.8	\$	29,300	\$ 36,000	
8.7	Site + Site Utilities	Install Irrigation	45,000	SF	\$1 - \$1.35	\$	45,000	\$ 60,800	
8.8	Site + Site Utilities	Install New Trees	50	EA	\$400 - \$800	\$	20,000	\$ 40,000	
8.9	Site + Site Utilities	Install New Landscaping	1,250	EA	\$7 - \$9	\$	8,800	\$ 11,300	
8.10	Site + Site Utilities	Covered Parking Structures	5	EA	\$2750 - \$3500	\$	13,800	\$ 17,500	Does not include solar panel on roof in estimate
8.11	Site + Site Utilities	EV Parking	3	EA	\$25000 - \$40000	\$	75,000	\$ 120,000	
8.12	Site + Site Utilities	Dumpster Enclosures	2	EA	\$20000 - \$30000	\$	40,000	\$ 60,000	
8.13	Contingency	Construction / Estimating Contingency			5%	\$	476,700	\$ 641,200	
		RANGE TOTALS				\$	10,010,000	\$ 13,465,000	



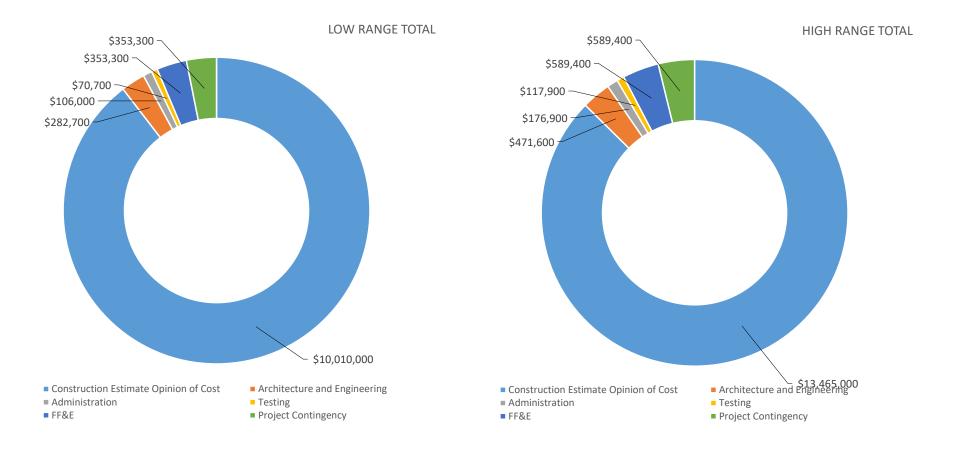
PHASE 8 PROJECT BUDGET WITH SOFT COSTS

BUDGET CATEGORY	% OF BUDGET
Construction Estimate Opinion of Cost	
Architecture and Engineering	8%
Administration	3%
Testing	2%
FF&E	10%
Project Contingency	10%

- Construction Estimate Opinion of Cost
- Administration
- FF&E
- Architecture and Engineering
- Testing
- Project Contingency

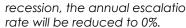
YEAR	ANNUAL ESCALATION RATE
2022	-
2023	16%
2024	10%
2025	10%
2026	8%
2033	8%
2043	8%
2053	8%

Please Note: In case of a recession, the annual escalation



PHASE 8 COST ESCALATION PROJECTIONS







PHASE 9 COST ESTIMATE SUMMARY

Please Note: Prices shown in 2022 dollars.

ITEM ID	CATEGORY	ITEM	QTY	UNIT	RANGE	L	OW RANGE, TOTAL	HIGH RANGE, TOTAL	NOTES
9.1	Demolition	Demo of Fleet Building, Fleet Portion	20,500	SF	\$7 - \$12	\$	143,500	\$ 246,000	
9.2	New Construction	New Class A Office Space, Conventional Framed	25,000	SF	\$325 - \$400	\$	8,125,000	\$ 10,000,000	High range shown in total
9.3	New Construction	New Class A Office Space, Tilt Up	25,000	SF	\$300 - \$375	\$	7,500,000	\$ 9,375,000	Low range shown in total
9.4	New Construction	New Class A Office Space, Pre-Engineered	25,000	SF	\$280 - \$345	\$	7,000,000	\$ 8,625,000	
9.5	New Construction	New Maintenance Building Space - No Crane, Conventional Framed	18,000	SF	\$245 - \$275	\$	4,410,000	\$ 4,939,000	
9.6	New Construction	New Maintenance Building Space - No Crane, Tilt Up	18,000	SF	\$225 - \$300	\$	4,050,000	\$ 5,388,000	
9.7	New Construction	New Maintenance Building Space - No Crane, Pre-Engineered	18,000	SF	\$180 - \$225	\$	3,240,000	\$ 4,041,000	
9.8	Site + Site Utilities	Install Slab Sod	15,000	SF	\$0.65 - \$0.8	\$	9,800	\$ 12,000	
9.9	Site + Site Utilities	Install Irrigation	15,000	SF	\$1 - \$1.35	\$	15,000	\$ 20,300	
9.10	Site + Site Utilities	Install New Trees	15	EA	\$400 - \$800	\$	6,000	\$ 12,000	
9.11	Site + Site Utilities	Install New Landscaping	250	EA	\$7 - \$9	\$	1,800	\$ 2,300	
9.12	Site + Site Utilities	Covered Parking Structures	80	EA	\$2750 - \$3500	\$	220,000	\$ 280,000	Does not include solar panel on roof in estimate
9.13	Site + Site Utilities	EV Parking	5	EA	\$25000 - \$40000	\$	75,000	\$ 120,000	
9.14	Site + Site Utilities	Dumpster Enclosures	1	EA	\$20000 - \$30000	\$	20,000	\$ 30,000	
9.15	Contingency	Construction / Estimating Contingency			5%	\$	561,600	\$ 806,200	
		RANGE TOTALS				\$	11,793,000	\$ 16,929,000	



PHASE 9 PROJECT BUDGET WITH SOFT COSTS

BUDGET CATEGORY	% OF BUDGET
Construction Estimate Opinion of Cost	
Architecture and Engineering	8%
Administration	3%
Testing	2%
FF&E	10%
Project Contingency	10%

- Construction Estimate Opinion of Cost
- Administration
- FF&E
- Architecture and Engineering
- Testing
- Project Contingency

YEAR	ANNUAL ESCALATION RATE
2022	-
2023	16%
2024	10%
2025	10%
2026	8%
2033	8%
2043	8%
2053	8%

Please Note: In case of a recession, the annual escalation rate will be reduced to 0%.



PHASE 9 COST ESCALATION PROJECTIONS

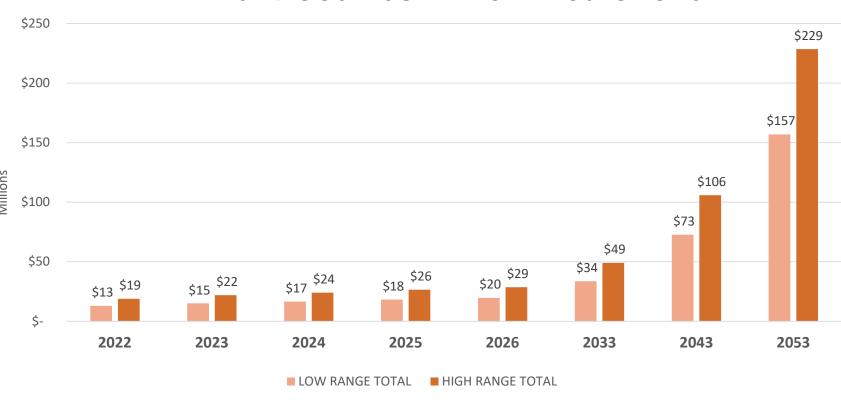






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80	Departmental Redundancies	4 – 7	
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MASTER PLAN TEAM

ADG | Blatt Project Manager, Design Development, Mechanical and Plumbing Assessment

CEC Corporation Civil and Electrical Assessment

White and Associates Construction Estimator

Artman Appraisals Commercial Appraiser





EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

Master Plan Goal

The purpose of this Master Planning effort, as noted in the original request for qualifications, is to develop a "sound, actionable, and fiscally responsible Public Works and Utilities facilities master plan that supports all aspects of both Departments' operational needs existing now and in the future. Currently, the Public Works Department has operations at three major locations: North Base, Lindsey Yard and City Hall. The City Utilities Department also has operations at North Base, City Hall and four other locations. The facilities master plan should focus on the preservation and potential redevelopment and/or readapting of current facilities as well as the identification of and/or planning for new facilities to establish a framework for the anticipated Department facility needs for the next 20 – 30 years.

Master Plan Process

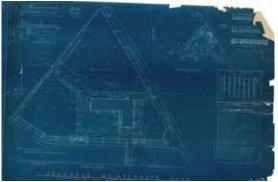
ADG | Blatt and the North Base Master Plan team have embarked on a series of tasks in order to compile the necessary data and information to fully execute this Master Plan effort.

- Task 1: Information Gathering
- Task 2: Programmatic Inventories
- Task 3: Operations Interviews
- Task 4: Program Projections and Space Allocations
- Task 5: Concept Development
- Task 6: Feasibility Study (current task)
- Task 7: Final Report

At the conclusion of each task, ADG | Blatt has submitted its findings in report format to the City of Norman Department of Public Works for review, comment, and approval. Throughout Tasks 4 and 5, as programmatic adjacencies were identified and conceptual designs began to take shape, the team had regular meetings with all divisions of Public Works and staff from the Utilities, Parks and Facility Maintenance, and Fire Departments. Staff feedback is crucial to the overall success of the design and this project was the proud benefactor of a wealth of commentary from all stakeholders.

This Final Report is be a comprehensive document compiling all of the information acquired throughout this process, notes from employee interviews, site commentary, cost estimates and projections, financial data, proposed master plan, and any other necessary documents relevant to this effort.





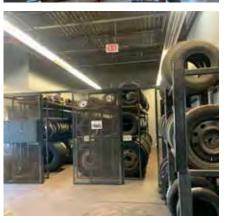












Project Considerations

The North Base Master Plan team is working to develop a Final Master Plan package that reflects the guiding principles from the City's vision and common themes generated during interviews in Tasks 1 - 3 with Public Works, Parks and Facility Maintenance, Utilities and Sanitation, Fire, as well as City of Norman management staff. These guiding principles include the following:

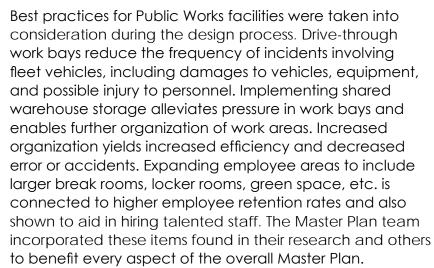
- Improve Efficiencies
 - Create space for shared work functions (ie. a shared welding in a centralized location for ease of use)
 - Combine shared functions and programs into the same space
 - Eliminate redundancies in administrative support staff by combining duplicated spaces
- Improve (and expand) Employee Areas
 - Enlarge employee locker rooms and break areas
 - Provide additional employee amenities to attract and retain talented staff
 - Explore outdoor wellness areas and green space

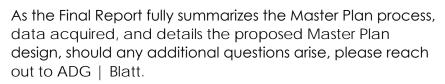
- Implement Sustainable Elements
 - Utilize solar energy to offset utility costs
 - Incorporating electric vehicle charging stations throughout the campus
- Increase Storage
 - Establish systematic organization in designated areas, reducing storing items in work areas which can potentially halt or hinder productivity
 - Provide storage bays that can house heavy-duty equipment and fleet vehicles in the event of a weather event that will not interfere with daily operations
- Address Parking
 - Separate employee parking from fleet parking and removed from daily operational circulation of vehicles
 - Ensure adequate parking for light, medium, and heavy-duty vehicles now and with projected growth for the next 30-years
 - Provide covered parking throughout the campus



Master Plan Development

As the Master Plan's tasks were in progress and considerations were being formed, the concept for the proposed design began to take shape. As outlined in Section 08 of this Volume, redundancies between departments were identified and informed the direction of programming adjacencies. Refining duplicative tasks and functions will help streamline operations and enable space to be used more efficiently.









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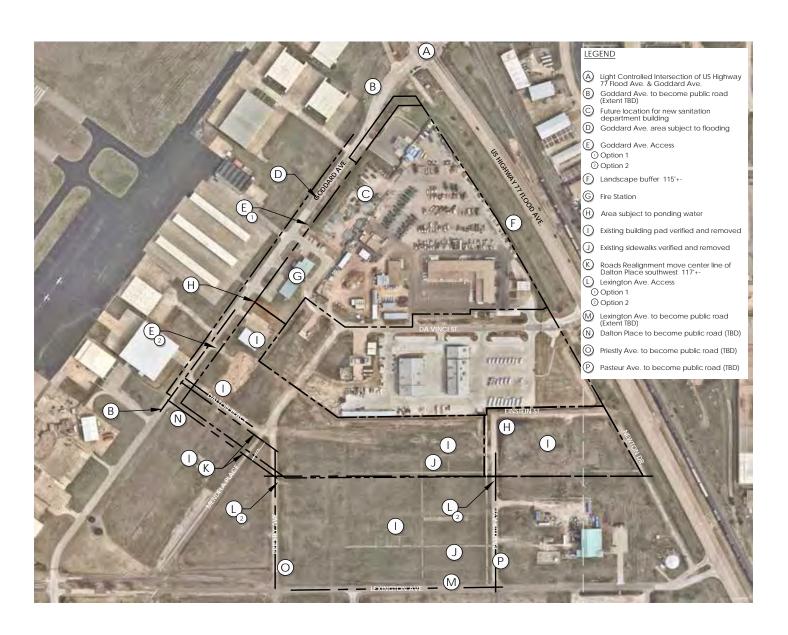




02 SITE / BUILDING INFRASTRUCTURE ASSESSMENT

NORTH BASE

The overall City of Norman owned property is approximately 26 acres, located on the north side of Norman, bounded at the intersection of US Highway 77 on the east and Goddard Avenue and Max Westheimer Airport on the west. The southern boundary of the site is an irregular line approximated on the eastern boundary by Einstein Street and on the western boundary by an alignment that separates the City of North Fire Station No. 7 and the University of Oklahoma Sooner Flight Academy. Adjacent to the southern boundary is University of Oklahoma property. Recent improvements to the internal Da Vinci Street subdivides the property into northern and southern sections. The affected area of this proposed Master Plan effort is approximately 10.4 acres.



Current Infrastructure

The site and building components located on the North Base Campus contain City of Norman departmental presences as follows (RE: Site Map and Site Infrastructure Matrices):







Fleet Management Department Building:

Located north of Da Vinci Street, the current building contains both Fleet Maintenance and Line Maintenance Departments.

Traffic Control Department Building:

Located north of Da Vinci Street, the current site presence includes a primary building and several ancillary structures.

Sanitation Department Building:

Located north of Da Vinci Street and towards the western portion of the property, the current building contains is obsolete and is to be replaced with a new structure.

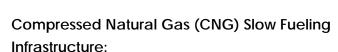
Fire Tower Training Facility:

Located on the southern portion of the property and south of Da Vinci Street, this facility is being phased out and relocated to a possible off- site location. This property will become available as a part of the proposed Long Range Master Plan



Compressed Natural Gas (CNG) Fueling Station Item 11.

Located north of Da Vinci Street and in the northernmost portion of the property, this station is one of the newer structures on the property. This facility has been diligently maintained with respect to both maintenance and code/ ordinance compliance and is an integral component of the north base campus. This facility is to remain in action and is not intended to be modified in the short term.



Sanitation: Eleven (11) stations with the capacity for twenty-two (22) sanitation vehicles. The location of these fueling stations is adjacent and convenient to the proposed new Sanitation Building.

Fleet Maintenance: Seven (7) stations with the capacity for fourteen (14) vehicles. The location of these fueling stations is in the central portion of the property.

Growth: Sub-grade raceways with rough stub ups have been provided for an additional five (5) stations with a capacity for ten (10) potential slow fill fueling stations. The location of these fueling stations is in the central portion of the property.







Petroleum Fueling Stations:

Located north of Da Vinci Street and towards the eastern portion of the property, the current two island station is undersized for the needs of the facility and are supplied by sub-grade tanks that are nearing the end of their life cycle.



Proposed / Future Infrastructure Under Construction:

The site and building components located on the North Base Campus contain City of Norman departmental presences as follows (RE: Site Map and Site Infrastructure Matrices):





Proposed Transit and Public Safety Maintenance Building:

Currently under construction, this facility will house a duplicated staff of the existing fleet maintenance building and will support approximately 30 large vehicles including buses, fire apparatus and police vehicles. The vehicles serviced out of this facility will represent approximately 3% of the current City of Norman Fleet (30 of 900).

Proposed CNG slow fuel stations and Electric Vehicle Charging Stations:

Currently under construction, a CNG line has been extended from the current on site infrastructure to the paved area east of the new Proposed Transit and Public Safety Maintenance Building. This area will contain new CNG slow fueling stations.

Currently under construction, the paved area east of the new Proposed Transit and Public Safety Maintenance Building will contain new electric vehicle charging stations.

Proposed Parks Maintenance Building:

Currently under construction, this facility will house the staff and support functions that currently reside at the Reaves Park, Griffin Park, Hall Park and City Hall facilities.

Proposed Sanitation Department Building:

New Sanitation Department building is proposed to the northwest of the current sanitation vehicle slow fuel CNG stations. Construction has not commenced for this building.

Proposed Vehicle Wash Bay:

New Vehicle Wash Bay building is proposed to the northwest of the current Fire Training Tower. Construction has not commenced for this building.

Storage and Parking







On Property Storage:

Several areas dispersed throughout the site contain stored and staged materials for City use. The primary lay down space for Traffic signals, poles, etc. was displaced with the commencement of the new Sanitation building. There is also open space that contractors could drive through and pick up construction materials for projects the City of Norman do not self-perform. Some lay down space will need to be identified to accommodate for future growth and operations.

Stored materials include, but are not limited to, the following:

- 1. Topsoil / Sand
- 2. Construction Materials
- 3. Light pole parts and pieces
- 4. Equipment Staging

Several auxiliary storage buildings are used primarily by the Traffic Division to store signs, road, barricades, and various other items.

These buildings are at capacity and additional storage space is necessary.

The Fleet Division has a separate parking lot at the North end of the site to store vehicles and equipment that have been slated for auction known as the "auction yard." Miscellaneous parts and pieces are also staged here.

On Property Parking:

Several areas are designated for on site parking:

- 1. Administrative Parking (Front Lot) 88 spaces
- 2. Staging and Waiting Parking 50 spaces
- 3. North of Staging Parking 23 spaces
- 4. Done Line (Adjacent to auction yard) 16 spaces
- 5. Sanitation Parking 22 spaces (not verified on site)
- 6. Sanitation Slow Fuel (night parking) 14 spaces
- 7. Line Maintenance Slow Fuel (night parking) 22 spaces
- 8. Traffic Control Parking 16 Spaces
- 9. Parks Maintenance and Transit and Public Safety Maintenance Building 74 spaces (not verified on site)
- 10. Parks Maintenance and Transit and Public Safety Maintenance Building deep spaces 40 spaces (not verified on site)
- 11. Parks Maintenance and Transit and Public Safety Maintenance Building 31 CNG slow fuel spaces / Electric Vehicle Charging shared pull through spaces (not verified on site)

There are current site constraints on the north base property with respect to parking. These constraints include but are not limited to the following:

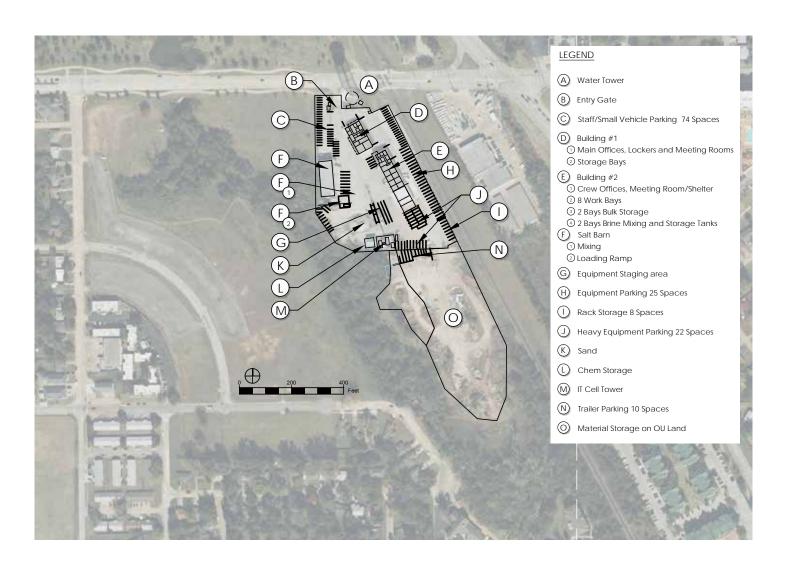




- There is a need for purposeful wayfinding and site signage to identify and contain specific parking types and quantities.
- The current parking lot configuration creates an inefficient routing of vehicles as well as a constrained connection between the parking spaces and the vehicle service functions.
- The location of the Fleet
 Maintenance CNG slow fuel stations
 is in a centralized area that could have a higher performing purpose.
- There is an inadequate number of parking spaces based on the number of vehicles that will be on site.

LINDSEY YARD

The property is an approximate total 9.55 acres (5.2 acres in the primary property area and an additional 4.35 adjacent acres immediately south) located on the south side of East Lindsey Street adjacent and immediately west of the BNSF Railway. The western edge of the property is bounded by a creek that originates out of Brandt Park and converges into Bishop Creek to the south of the property.



Current Infrastructure

The site and building components located on the Lindsey Yard Site contain City of Norman departmental presences as follows (RE: Site Map and Site Infrastructure Matrices):





Building #1 - Main Office Building:

Located on the northern portion of the property and surrounded by parking spaces and vehicular access drives. This 6800 SF building houses Administration spaces for the City of Norman Street Maintenance and Stormwater Maintenance. Additionally, this building has and three (3) south facing service bays.

Building #2:

Located towards the middle and eastern portions of the property and providing additional support spaces for Street

Maintenance and Stormwater Maintenance divisions, the northern two bays of this building contain administrative spaces which support nine (9) additional bays on the southern portion of the building. Some of the bays are divided into two (2) program functions in the east/west direction.

Salt Storage Structure:

Located in the center of the property and adjacent to the west property boundary, this approximately 8,000 SF open air building is dedicated to the storage of salt product for City use.

Chemical Storage Building:

This enclosed building is located on the far south side of the designated property.

IT Towers and Servers:

Enclosed within a small gated fenced area adjacent to the south side of the property, this area contains IT Cell towers and Servers.

Storage and Parking



On Property Storage:

Several areas dispersed throughout the property contain stored and staged materials for City use. Although not severely inefficient, the current layout planning incorporates a fair amount of vehicular circulation. Stored materials include, but are not limited to, the following:

- 1. Topsoil
- 2. Sand
- 3. Construction Materials
- 4. Salt Mixing / Loading
- 5. Heavy Equipment Staging
- 6. Racks



On Property Parking:

Several areas are designated for on site parking:

- 1. Administrative Parking 74 spaces
- 2. Large Vehicle Storage (12x38) 25 spaces
- 3. Rack spaces / stalls 25 spaces.
- 4. Heavy Equipment Parking 11 spaces
- 5. Salt Barn Parking (enlarged stalls) 7 spaces
- 6. Trailer Parking (South Property) 10 spaces
- 7. Additional Parking undefined.

South Property Storage:

Several areas dispersed throughout the south property contain stored and staged materials for City use. There is a substantial amount of vehicular circulation on this portion of the property. Stored materials include, but are not limited to, the following:

- 1. Dirty Topsoil
- Material Storage (various staged areas)
- 3. Rip Rap
- 4. 2" Rock Storage
- Construction Debris (various staged areas)
- 6. Compostable Debris





REAVES PARK

The property and associated infrastructure and personnel located at Reaves Park will no longer be used for the City of Norman Parks Maintenance Department. This Department is being relocated to the North Base property to a new facility which is currently under construction. This building is scheduled to be substantially complete in the upcoming months.

Proposed Infrastructure

The new building is located on the south side of Da Vinci Street which is considered outside of the proposed North Base Master Plan.

CITY HALL

The City Hall Property, approximately 15,870 square foot facility located at approximately 104 West Gray Street, houses the Facility Maintenance which has been recently incorporated under Parks and Recreation's purview. Facility Maintenance was formerly under the responsibility of the City Clerk's office. The Department is currently evaluating leasing an existing building on private property.

Current Infrastructure



The current facility is a combination of administration, warehouse and storage for various City of Norman departments. The Administration area houses electrical, HVAC, Plumbing and Cleaning staff positions as well as managers and executive assistants.

The warehouse area contains parts and materials for the City of Norman inventory of construction infrastructure.

The storage area contains boxes of documents that do not relate to the Facility Maintenance Department daily operations.





DEPARTMENTAL CHARACTERISTICS AND PLANNING

NORTH BASE

Fleet Maintenance

Departmental Characteristics, Activities, and Initiatives:

The Fleet Maintenance department currently manages 900 pieces of equipment of varying sizes and scale. Operational activities are not currently efficient due to the layout of the facility and how City staff deliver vehicles and equipment for service, potentially interrupting the flow of operations. The Fleet Maintenance management and staff understand the current conditions and work to optimize their operations within the current site and facility parameters.

Goals:

0-5 years:

Initiate a concentrated effort to bring the minimum facility operations into compliance with the identified deficiencies identified in the 2013 Review of Fleet Management & Maintenance Practices report. Findings of this report indicate that the current facilities are 50% undersized. Upgrade site infrastructure to accommodate the current fleet equipment and quantity. Infrastructure upgrades will include new and additional sub-grade fuel storage systems, additional fuel dispensary bays, and additional fuel islands. Building upgrades will include additional pull-through bays for each equipment size and type, upgrades to administrative areas including but not limited to conference areas, break area, toilet/locker rooms.

10-20 years:

Plan for efficient operations including site and infrastructure planning, creating an environment that is optimized for success. Building layout will be specific to product work flow and separate functions of the maintenance bays from interaction with incoming and outgoing city staff. Infrastructure and personnel planning will be critically analyzed in order to eliminate redundant functions and pursue reductions in operational expenses.

20-30 years:

Long range planning will identify innovative site, building and staffing elements that are outside of current funding / staff allocation / City potential. Pursued items might include grand initiatives which will elevate the potential for this department in a manner that can only be accomplished through a defined vision and City dedication for pursuit.

Line Maintenance

Departmental Characteristics, Activities, and Initiatives:

The Line Maintenance department currently operates a single service bay and multiple bays of open storage space. Detailed accounting of departmental activities has not been documented.

Goals:

0-5, 10-20 and 20-30 years:

Line Maintenance is currently planned to move to a new off-site facility and will not maintain a physical presence on the North Base Site. Short, Medium and Long range documentation for this department is not anticipated as a part of this Master Planning effort.



Departmental Characteristics, Activities, and Initiatives:

The Traffic Control Department occupies a single administrative and operations building and multiple ancillary and storage buildings on the property. Detailed accounting of departmental activities has not been documented.

Goals:

0-5 years:

With investigation of the Traffic Control departments daily operations and activities, short term goals will include bringing site and building infrastructure up to current City standards and identifying location and funding for the Traffic Management Center. The division is investigating incorporating the Traffic Management Center into the new Emergency Communications and Operations Center, currently under design.

10-20 years:

Plan for efficient operations including site and infrastructure planning creating an environment that is optimized for success. Building layout modifications will address areas that are less efficient then the current operational intent. Infrastructure and Personnel planning will be critically analyzed in order to eliminate redundant functions and pursue reductions in operational expenses.

20-30 years:

Long range planning will identify innovative site, building and staffing elements that are outside of current funding / staff allocation / City potential. Pursued items might include grand initiatives which will elevate the potential for this department in a manner that can only be accomplished through a defined vision and City dedication for pursuit.

Fire Training Tower

Departmental Characteristics, Activities, and Initiatives:

The Fire Training Tower exists south of Da Vinci Street. Detailed accounting of departmental activities for this infrastructure has not been documented.

Goals:

0-5, 10-20 and 20-30 years:

The Fire Training Tower is currently planned to move to a new off- site facility and will not maintain a physical presence on the North Base Site. Short, Medium and Long range documentation for this department is not anticipated as a part of this Master Planning effort.

Transit and Parking Maintenance

Departmental Characteristics, Activities, and Initiatives:

The new Transit and Public Safety Maintenance department is currently under construction with completion expected in the near future. Interviews with current City staff have provided insight to the intent for this new building, including projected growth and shared elements. This new building is located to the south of Da Vinci Street and considered outside of the primary master plan area. As a periphery element on the site with the potential for efficient operations and shared functions, this department might be referenced as a part of the North Base Master Plan.

Detailed accounting of departmental activities has not been documented.

Goals:

0-5, 10-20 and 20-30 years:

Transit and Public Safety Maintenance department is currently being constructed south of Da Vinci Street and will not maintain a physical presence on the Primary portion North Base Master Plan Site. Short, Medium and Long range documentation for this department is not anticipated as a part of this Master Planning effort.

Parks Maintenance

Departmental Characteristics, Activities, and Initiatives:

The new Parks Maintenance facility is currently under construction with completion expected in the near future. Interviews with current City staff have provided insight to the intent for this new building, including projected growth and shared elements. This new building is located to the south of Da Vinci Street and considered outside of the primary master plan land area. As a periphery element on the site with the potential for efficient operations and shared functions, this department might be referenced as a part of the North Base Master Plan.

Detailed accounting of departmental activities has not been documented.

Goals:

0-5, 10-20 and 20-30 years:

The Parks Maintenance department is currently being constructed south of Da Vinci Street and will not maintain a physical presence on the Primary portion North Base Master Plan Site. Short, Medium and Long range documentation for this department is not anticipated as a part of this Master Planning effort.

Departmental Characteristics, Activities, and Initiatives:

The Sanitation Department occupies a single operations building and single ancillary buildings on the western portion of the north base property. Detailed accounting of departmental activities has not been documented.

A new building is currently projected for construction on the west side of the North Base site with primary access from Goddard Street. Commencement of construction and an anticipated completion date is not known. As a periphery element on the site with the potential for efficient operations and shared functions, this department might be referenced as a part of the North Base Master Plan.

Detailed accounting of departmental activities has not been documented.

Goals:

0-5, 10-20 and 20-30 years:

The Sanitation department is proposed for construction west and outside of the Primary portion North Base Master Plan Site. Short, Medium and Long range documentation for this department is not anticipated as a part of this Master Planning effort.

Vehicle Wash Bay:

Departmental Characteristics, Activities, and Initiatives:

A new Wash Bay facility is currently projected for construction on the west side of the North Base site and south of Da Vinci Street. Commencement of construction and an anticipated completion date is not known. As a periphery element on the site with the potential for efficient operations and shared functions, this department might be referenced as a part of the North Base Master Plan.

Detailed accounting of departmental activities has not been documented.

Goals:

0-5, 10-20 and 20-30 years:

The future Wash Bay is proposed for construction west and outside of the Primary portion North Base Master Plan Site. Short, Medium and Long range documentation for this department is not anticipated as a part of this Master Planning effort.

LINDSEY YARD

Street Maintenance

Departmental Characteristics, Activities, and Initiatives:

The Street Maintenance department co-occupies a single administrative building, a maintenance bay building and an open air salt storage building.

Goals:

0-5 years:

This division may be relocated to the North Base site, with planning and construction accommodating the current staff and infrastructure with a designated amount of additional space for responsible and short term growth. The overall master plan effort will show how proposed construction will accommodate additional growth potential with respect to the following long term aspects.

10-20 years:

Plan for efficient operations including site and infrastructure planning creating an environment that is optimized for success. Planned building layout will address areas that are less efficient then the current operational intent. Infrastructure and Personnel planning will be critically analyzed in order to eliminate redundant functions and pursue reductions in operational expenses.

20-30 years:

Long range planning will identify innovative site, building and staffing elements that are outside of current funding / staff allocation / City potential. Pursued items might include grand initiatives which will elevate the potential for this department in a manner that can only be accomplished through a defined vision and City dedication for pursuit.

Stormwater Maintenance

Departmental Characteristics, Activities, and Initiatives:

The Stormwater Maintenance department co-occupies a single administrative building and a maintenance bay building.

Goals:

0-5 years:

This division may be relocated to the North Base site, with planning and construction accommodating the current staff and infrastructure with a designated amount of additional space for responsible and short term growth. The overall master plan effort will show how proposed construction will accommodate additional growth potential with respect to the following long term aspects.

10-20 years:

Plan for efficient operations including site and infrastructure planning creating an environment that is optimized for success. Planned building layout will address areas that are less efficient then the current operational intent. Infrastructure and Personnel planning will be critically analyzed in order to eliminate redundant functions and pursue reductions in operational expenses.

20-30 years:

Long range planning will identify innovative site, building and staffing elements that are outside of current funding / staff allocation / City potential. Pursued items might include grand initiatives which will elevate the potential for this department in a manner that can only be accomplished through a defined vision and City dedication for pursuit.

REAVES PARK

Parks Maintenance

Departmental Characteristics, Activities, and Initiatives:

The Parks Maintenance department occupies three structures on the Reaves Park site as follows:

Administration and Maintenance: 10,291 SF Christmas Storage: 1,443 SF Plumbing/Irrigation Warehouse: 6,944 SF

The balance of the Parks Maintenance Department is listed with North Base divisions under the same heading.

CITY HALL

Facility Maintenance

Departmental Characteristics, Activities, and Initiatives:

The City Hall Property is an approximately 15,870 square foot facility located at approximately 104 West Gray Street, which houses the Facility Maintenance Department.

The current Facility Maintenance Department contains staffing that is proposed to be relocated to a new building, adjacent to the new Parks Maintenance Facility, on the south side of Da Vinci Street. Until this new space is made available, a leased space located on private property is being utilized. City is exploring leasing on a private property until project location can be identified and funding made available.

0-5 years:

This division may be relocated to the North Base site, with planning and construction accommodating the current staff and infrastructure with a designated amount of additional space for responsible and short term growth. The overall master plan effort will show how proposed construction will accommodate additional growth potential with respect to the following long term aspects.

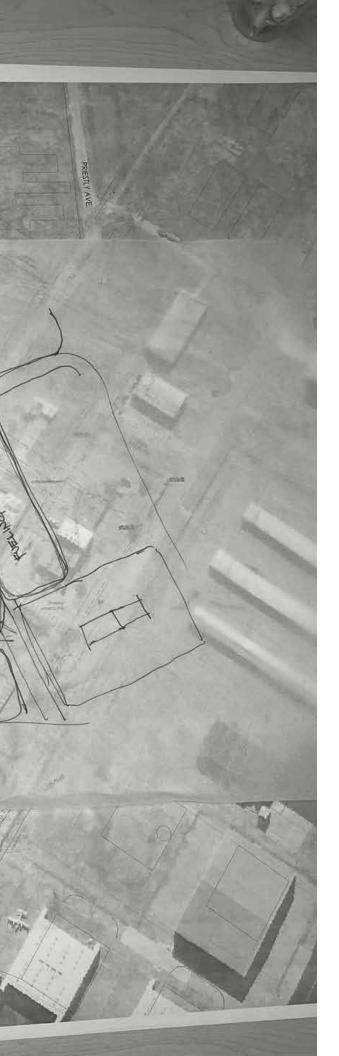
10-20 years, 20-30 years:

Plan for efficient operations including site and infrastructure planning creating an environment that is optimized for success. Planned building layout will address areas that are less efficient then the current operational intent. Infrastructure and Personnel planning will be critically analyzed in order to eliminate redundant functions and pursue reductions in operational expenses.



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GRAPHIC DIAGRAMS

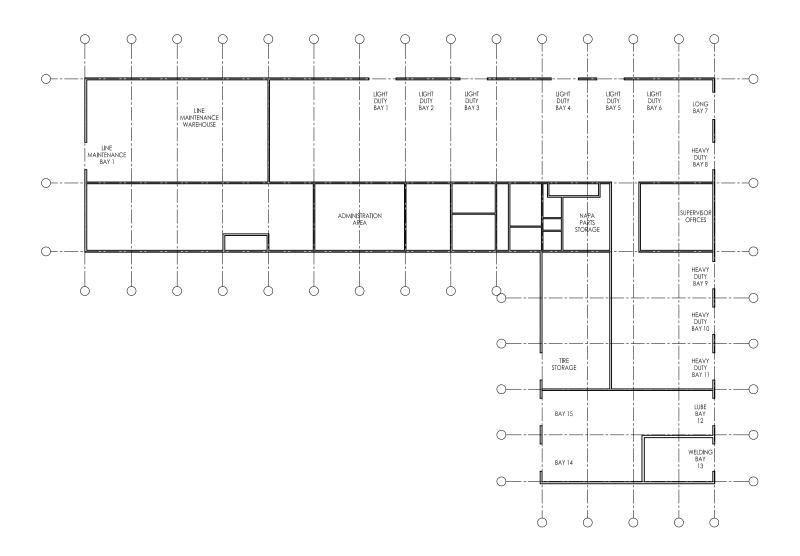


SITE PLAN NORTH BASE

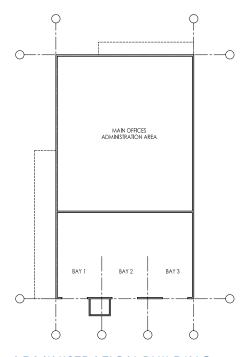




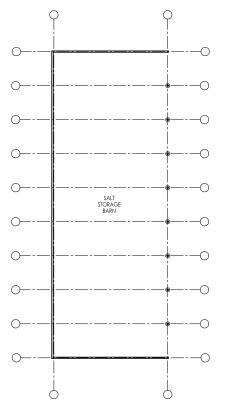
SITE PLAN LINDSEY YARD



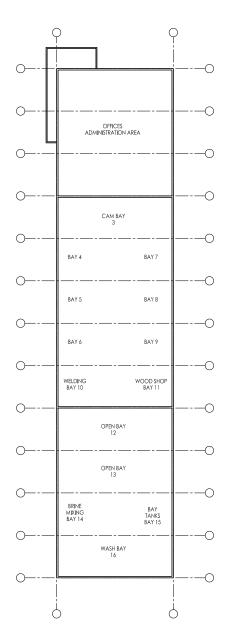
NORTH BASE FLEET MAINTENANCE / LINE MAINTENANCE BUILDING



ADMINISTRATION BUILDING

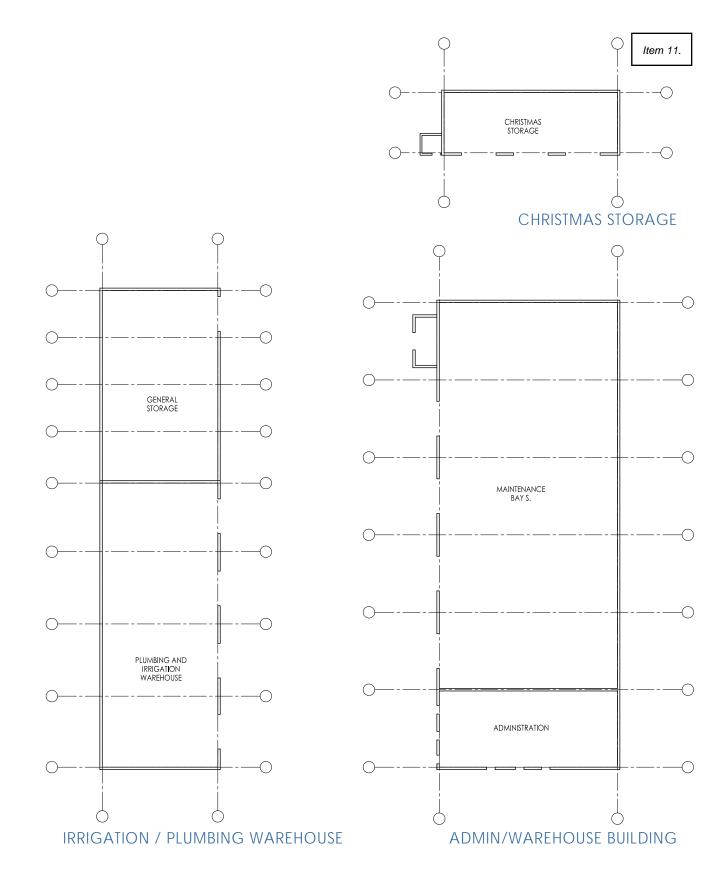


SALT STORAGE BUILDING

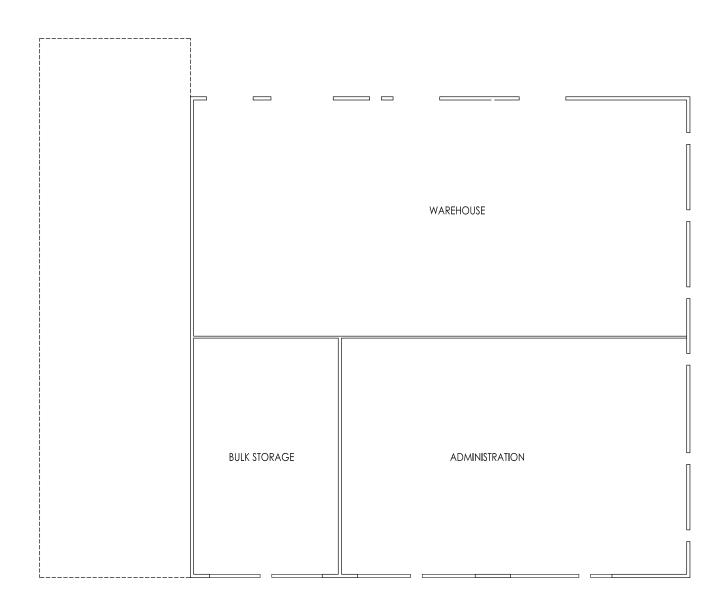


MAINTENANCE BUILDING

LINDSEY YARD
STREET MAINTENANCE AND STORM MAINTENANCE BUILDINGS



REAVES PARK
PARKS MAINTENANCE BUILDINGS



CITY HALL BUILDING FACILITY MAINTENANCE





05 SPACE PROGRAMMING MATRIX

North Base

Main Building - Fleet Maintenance

	Square	e Footage	Sta	offing	Parking
Space Title	Current	Proposed	Current	Proposed	
	2//2				
Administration Space	2660				
Supervisor Office					
Administrative Support					
Meeting Room					
Break Room					
Staff Toilets					
Staff Lockers					
Vahicla Maintananca Pays					
Vehicle Maintenance Bays	8872				
Light Duty Vehicles	5100				
Heavy Duty Vehicles					
Lube Bay	675				
Welding Bay	675				
Tire Storage	1800				
Supervisor Office	1010				
Parts Storage (Outside Vendor)	706				
Bulk Fluids	427				
Exterior Functions					
Air Compressor Station	200				
Staff Parking	44600				
Completed Vehicle Parking	11900				
For Service Parking	31600				
Dedicated CNG Slow Fuel Islands	46900				
Potential CNG Slow Fuel Expansion	13900				

North Base

Main Building - Line Maintenance

	Square	Footage	Sta	ffing	Parking
Space Title	Current	Proposed	Current	Proposed	
Open Vehicle Bay	900				
Bulk Storage	2800				

Lindsey Yard

Administration Building

	Square	Footage	Sta	ffing	Parking
Space Title	Current	Proposed	Current	Proposed	
Administration Space	4767				
Managers Offices					
Crew Chief Offices					
Administrative Support Offices					
File Storage					
Locker Rooms Male					
Locker Rooms Female					
Breakroom / Conference Room					
Isolated Offices					

Lindsey Yard

Vehicle Service Building

	Square	Footage	Sta	nffing	Parking
Space Title	Current	Proposed	Current	Proposed	
Vehicle Service Building	3200				
Managers Offices					
Inspectors Office					
Crew Offices					
Safe Room					
Norking Service Bays					
Parts Receiving					
Wood Working Bay	530				
Welding Bay	530				
Dry Storage					
Sign Storage					
Rain Barrel Storage					
Sediment Storage					
Heavy Duty Truck Storage					
Brine Mixing	1060				
Wash Bay	1060				

Lindsey Yard

Outside Yard Storage

	Square	Footage	Sta	ffing	Parking
Space Title	Current	Proposed	Current	Proposed	
Chemical Storage	2000				
Salt Storage	under cover				
Trailer Storage	4900				
Material Storage	13200				
Topsoil	4200				
Construction Material					
Rip Rap Storage	3000				
Compostable Debris	4500				
Construction Debris	2400				

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PERSONNEL ASSESSMENT



North Base Master Plan City of Norman – Interview Summary

Interviews were conducted between December 21, 2021, and January 12, 2022 with the City of Norman Departments to discuss their operations and long range growth as it pertains to North Base and Lindsey Yard. The Departments and their divisions are as follows:

- Parks and Recreation
 - Parks Maintenance
 - Facility Maintenance
- Public Works
 - Fleet
 - Stormwater
 - Streets
 - Traffic
- Utilities
 - Sanitation

Following is an executive summary of the findings with the meeting minutes attached:

NORTH BASE

Fleet

Bay Requirements

Туре	Current No. Bays	Current No. Technicians	Future No. Bays
Light	6	7	12
Heavy	5	8	12
Lube	Need 2		4
Long Trail	ers		1 (13 th slot)

Parts Room/Storage/Admin Requirements

- Parts Room, Oil Room and Administrative Offices need to be centrally located
- Climate controlled to protect parts in storage
- Prefer Tire Carousel system (30'x12') holds 75 tires/carousel
- Administrative offices need a line of site to the bays possible location is upstairs
- Infrastructure to include Bridge Crane, Catwalk System, Fume Management, Drains, Welding Bay and Tool System for uncluttered workspace
- Two "clean" rooms (200 sq. ft. each) for electronics and engine room work

Sanitation – Site Requirements

- New building designed for 35-year plan and breaks ground March 2022
- 40-42 Sanitation Trucks
- 30 CNG Slow-fill stations need 35 now
- Covered parking/canopy system for vehicle weather protection





Traffic

Vehicles / Bays

Туре	Current No.	Future No.	Notes
Bucket Truck	1 – need 2 now	3	Stored in separate building
Radar Trailer	3 – 5x7		
Paint Rig		Space to rinse	
City Vehicles			CNG and Petrol
Forklift	1	2	Shared with other departments
Sign Bay	15' – need SF		
Paint Bay	15' – need SF		
Welding Bay	-	1 -or share wel	ding space

Office / Storage

- Climate controlled areas for traffic controls and paint. Remaining storage protected from elements
- Vertical storage is utilized but could be expanded
- Outside storage space is currently a challenge and constantly condensing
- Office, meeting rooms and storage are currently undersized

Sign Maintenance

- Staff 17 people with immediate need for growth
- Office/Break Room need additional space to house staffing
- Traffic Maintenance Systems 18x27 is not adequate for staffing and cabinet testing
- Sign Production Room shared space for 7-8 staff and sign graphic operations
- Storage/warehouse additional space needed for paint beyond one week's worth of work
- Currently use warehouse for vehicles requiring climate control during cold weather.
- Three (3) Individual Buildings (one bay each) for storage and Outdoor Storage Yard
- Loading dock used by other departments consider access to the inside.

Common Items

- Employees and Supervisors need private meeting space for evaluations
- Evaluate flexible work-spaces with docking stations
- Provide covered parking for vehicles
- Expand designated visitor parking
- Address safety of vehicles on site and exiting
- Consider vertical storage and central welding bay
- Consider enclosing air compressors currently there are issues during cold weather
- o Provide generator determine required loads

LINDSEY YARD

General – Site Usage

- Streets and Stormwater have operations at Lindsey Yard
- During Snow / Ice operations concern for safety and ease of moving trucks in and out of site.
 Currently get trucks in and out of Lindsey Yard in three (3) minutes.
- No fueling on site (Diesel and CNG looking to converting to Electric)
- Salt storage and brine production
- Protected parking needed
- o Generators needed
- o Streets to provide administrative/interior programs
- Need spot to dock with technology for crew chiefs
- o Big meeting/lunch day breakroom to house 60 (Streets and Stormwater personnel)

Storage

Utilize 4-5 acres of adjacent OU property for storage - construction debris/haul-of



- o Vertical storage could be utilized need a forklift
- Stockpiles of sand/dirt
- Corrosive / hazardous materials stored in chemical building

Snow / Ice

- o Salt storage undersized and not to regulation (size?) loading needs to efficient
- Brine could transition to utilizing more bring need more storage
- o Two 2000 gallon tanks of brine
- o 27 semis deliver salt to site
- o 8 vehicles stored in bays during freezing weather
- o Water and two (2) sand trucks used for brine operation
- o No fueling on site





Meeting Minutes

Date: 01/28/2022

Time: 9:30 PM

Meeting No: 009

Location: Traffic - Sign Maintenance Site

Visit

ADG Project Number: 21-035

ADG Project Name: North Base Master Plan

In Attendance - Name / Organization:

T. Blatt / Blatt Architects

J. Blatt / Blatt Architects

SM. Hendrickson / ADG

Purpose: Operations Interview - FleetOperations Interview - Traffic | Sign Maintenance

1. SIGN MAINTENANCE

- A. Current staffing of 17 people. There are not enough staff members to do the work. Additional staffing is a common request.
- B. Office Configuration:
 - i. There is a single private office and an adjacent open area each space houses an single individual.
 - 1.B.i.1. There is no room for a private conversation / evaluation.
 - ii. There is a single break room that can not handle the entire staff.
 - 1.B.ii.1. Only seats 10 people it needs to handle at least 17.
 - 1.B.ii.2. There is an IT closet, Electrical panels and a white board that is not easily accessed.
 - iii. The building is heated and cooled via three (3) residential style split systems
- C. Traffic Maintenance Systems:
 - i. Approximately 18x27
 - ii. Traffic Maintenance, Signal Maintenance, Tech Room
 - iii. Normally houses 7 technicians.
 - iv. Not uncommon to have training in this room for up to 10 people.
 - v. Revealed later that cabinet testing used to be accomplished within this space, but due to lack of room, cabinet testing was moved to the outside.
 - vi. The room gets too hot in the summer time (common complaint)
- D. Sign Production Room.
 - i. Houses 7-8 people in the same space that the sign graphics are being applied to the metal blanks.

- E. Staff space with systems furniture.
 - i. 6 cubicle style spaces with a 7th desk for a new locater. This space does not allow for growth.
- F. Storage / Warehouse
 - İ. Water borne paint is kept – enough for a weeks worth of work. There is a definite need for additional warehouse space.
 - ii. This department does an amazing job of neat and efficient storage – very impressive.
 - iii. Sign racks keep multiple signs available for immediate installation.
 - İ۷. Signs are now easier and quicker to make, so there is less that needs to be kept in storage.
 - City of Norman handles rural striping that is done with waterborne paint and glass beads. ٧.
 - ۷İ. All thermoplastic striping is contracted out – and that is the preference of the City.
- Trucks are brought inside when it is cold this is an added step. Would be beneficial to have enclosed storage for vehicles that require climate control.
- Н. Outside storage in individual buildings (one bay each)
 - İ. Bay One: Aerial Equipment
 - 1.H.i.1. Very Neat but packed tight.
 - ii. Bay Two: Traffic Maintenance
 - 1.H.ii.1. Three (3) radar speed trailers
 - 1.H.ii.2. Road closed signs.
 - 1.H.ii.3. Traffic cones.
 - 1.H.ii.4. Portland Cement
 - 1.H.ii.5. Thermoplastic Striping (small scale for heat application).
 - iii. Bay Three:
 - 1.H.iii.1. Traffic Equipment
 - 1.H.iii.2. Parking meters
 - 1.H.iii.3. Caution signs
 - 1.H.iii.4. More equipment that goes inside the traffic cabinets.
 - İ۷. ½ outdoor bay for wire and some miscellaneous items
 - 1.H.iv.1. All wire needs to go on a spool for easier access.
- Outdoor Storage (Including the "bone yard")
 - İ. Subgrade quazite boxes
 - ii. New poles
 - iii. Spare cabinets (there were 8 on site – that is about the maximum number they will keep in queue).
- J. Air Compressor is outdoors – same as other departments. It's an issue when it gets cold.
- Definitely need a generator to keep things moving in bad weather, etc. Κ.
- Bone Yard.



- i. Lots of miscellaneous items poles, etc. Needs to be organized and definitely needs a digital cataloging system.
- M. Loading Dock.
 - i. Frequently used.
 - ii. Would benefit from access to the inside.
 - iii. Used by other departments as well.
- N. EDC not locating in this facility



Meeting Minutes

Date: 12/22/2021

Time: 3:30 PM

Meeting No: 005

Location: Virtual, Via Teams

ADG Project Number: 21-035

ADG Project Name: North Base Master Plan

Purpose: Operations Interview - Fleet

In Attendance - Name / Organization:

X T. Blatt / Blatt Architects

SM. Hendrickson / ADG

M. White / City of Norman

B. Churchill / City of Norman

M. Delgato / City of Norman

B. Nance / City of Norman

1. STAFFING / BAYS

A. Light Vehicles (Mark's area)

i. 7 technicians / 6 bays (inefficient)

ii. 12 service bays - needed

B. Heavy Vehicles

i. 8 technicians / 5 service bays

ii. 12 service bays – needed

C. Lube

i. Need 2 bays added now

ii. 10-year growth: 4 bays needed

D. Overall need 2-3 more service areas for future

E. Bay is also needed for long trailers (13th slot)

2. PARTS ROOM / STORAGE

- A. Appropriate space and centrally located is key
- B. Include 2-3 service windows to keep lines short for technicians gathering parts
- C. Climate Control area to protect parts
- D. 6000 sq. ft.
- E. Tire Carousel (20' x 12') preferred currently holds 75 tires/carousel
 - i. 152 light tires
 - ii. 70 heavy tires



- iii. Having to stack more because so many are different sizes for a variety of vehicles
- iv. Can be situated in parts room
- v. Referred to NAPA and their inventory availability system as an example system
- F. Air compressor and charge tank required (size?)
- G. Oil room also needs to be centrally located

3. ADMINISTRATION AREA

- A. Centrally located line of site to operations is key
- B. Possibly have supervisors upstairs
 - i. Public drop-ins need to be addressed so as not to interrupt work and have a designated location to direct public
- C. Influx of vehicles and vendors in the area need to address flow

4. INFRASTRUCTURE DISCUSSION

- A. Bridge crane required on heavy side of shop
- B. Catwalk system preferred
- C. Bay for long trailers (size?)
- D. Fume management
- E. No floor drains (recycle mop water) will still need drains and consider underground tank
- F. Welding Bay
- G. Electronics/Hybrids
 - i. Need a couple of "clean" rooms, 200 sq. ft each one (1) now and two (2) for future
 - ii. Similar to an office with return air and seals machine room requirements for an engine room
- H. Vending Machine for Tools fixed tool systems with uncluttered workspace desired
 - i. Can expand to 10 stations
- D. Fire Station No. 7 EDC not locating in this facility



Meeting Minutes

Date: 01/12/2022 In Attendance - Name / Organization:

Meeting No: 008

SM. Hendrickson / ADG

Location: Virtual, Via Teams

SM. Hendrickson / ADG

J. Olsen / City of Norman

ADG Project Number: 21-035 W. Thompson / City of Norman

ADG Project Name: North Base Master Plan

Purpose: Operations Interview - Parks and Facility Maintenance

1. NEW FACILITY DESIGN

A. Design documents to be provided by Parks and Facilities

STORAGE

- A. Laydown yards small pieces of scrap metal, T-posts, playground borders need to find a location to haul off T-posts
- B. Opportunities to go vertical
 - i. Playground equipment are lightwieght
 - ii. Anything that can be palletized, including T-posts should be converted
 - iii. Need to free up drive area
 - iv. Need a forklift

3. VEHICLES

- A. Light duty for future, considering hybrid over CNG (company servicing the CNG vehicles no longer in business)
- B. Considering a future electric mower not feasible currently
- C. Storage
 - i. Old building could not store vehicles during cold spell takes an hour to clean/warm
 - ii. Need to find a location during weather storms for storage of vehicles
 - 3.C.ii.1. Streets' trucks did not stay in the yard drivers took them home

4. FACILTY MAINTENANCE - REQUIREMENTS FOR BUILDING SPACE

- A. Need to address the current storage of files
- B. Need to move storage and warehouse away from the Parks and Facility two storages
- C. Upgrade of interior offices, breakrooms, etc.
 - i. Need information on future staffing requirements from Parks and Facilities
- D. Prefer to keep attic stock (flooring, ceiling tiles) with Facility Maintenance and can be stored vertically
- E. Lockable area for Electricians, Survey and Plumbing equipment





Meeting Minutes

Date: 12.21.2021 In Attendance - Name / Organization:

Time: 3:30 PM _____ T. Blatt / Blatt Architects

Meeting No: 002

Location: Virtual, Via Teams

SM. Hendrickson / ADG

S. O'Leary / City of Norman

ADG Project Number: 21-035

ADG Project Name: North Base Master Plan

Purpose: Operations Interview: Public Works

1. GOALS FOR MASTER PLAN, NORTH BASE SITE

- A. Old, worn-out buildings being used not as they are designed
- B. Vacating and selling Lindsey, valuable real estate to OU
- C. 20+ year plan horizon
- D. What is truly needed now for storage needs, plus future needs
- E. Sale to use as seed capital for North Base financial strategy
 - i. On North Base
 - ii. Acquire property adjacent to North Base
 - iii. Keep Lindsey, do what we can at North Base
- F. Co-locating field operations (street, stormwater, traffic, sanitation) and co-locating fleet, motor pool gain efficiencies
 - i. Snow / Ice control operations
- G. Main priorities
 - i. Storage and accessibility of materials
 - ii. Administration of people
 - iii. Storage of equipment (and the people who operate the equipment)
- H. Great example: Public Works facility in Hutchison, Kansas
 - i. All administration under 1 roof
- 1.2. Ideas
 - i. Would like 1 large building north of side
 - ii. More fuel islands
 - iii. Separate space for material storage, away from fleet, parking, people

2. PUBLIC WORKS OPERATIONS

- A. 110 staff on one site
 - i. 20 at Development Center
 - ii. 55 currently at North Base
 - iii. 55 currently at Lindsey
- B. Crew chiefs
 - i. In charge of 4-6 people
 - ii. Manage team, email, etc.
 - iii. Need space for crew meetings, sending emails / reports; Can be efficient, could be shared, more if needed than what is currently available
 - iv. Need space for confidential meetings

3. LINDSEY

- A. Lindsey: good sf for now, would need more sf in future
 - i. Can / should be more efficient
- B. Salt is exposed SW stormwater
 - ii. Doesn't necessarily need to be at North Base
 - iii. Salt Trucks (dump trucks in off-season) desire to convert to CNG, requiring additional slow-fill stations
 - iv. Covered storage is a challenge

4. NORTH BASE

- A. No zoning issues
- B. Julie would like to do a timelapse at key times (morning and afternoon) to see how site is traversed
- C. CNG in place; needs to stay close to compressor
 - 150 CNG in Norman, saving \$\$\$
 - ii. \$0.84 / gallon net cost
 - iii. Can expand to 10 stations
- D. Fire Station No. 7 EDC not locating in this facility





Meeting Minutes

Date: 12.21.2021 In Attendance - Name / Organization:

Meeting No: 001 SM. Hendrickson / ADG

ADG Project Name: North Base Master Plan

Purpose: Operations Interview: Sanitation

1. DIVISION OPERATIONS

A. 430,000+ services a month

B. New building breaking ground March 2022, bid opening at end of January

C. Staff at North Base: 55 total, 35 drivers

2. NEW FACILITY

- A. Building as FTA gate to North Base site
- B. Fencing on sides
- C. 35-year business plan incorporated into new facility
 - i. Bret to compile and share memorandums, correspondence, etc.
 - ii. Current staff: 35 drivers (with future growth to 60); 55 total staff over three locations (35 at North Base at various time throughout the day)
- D. Employee parking included on site

3. SANITATION FLEET

- A. 40-42 sanitation trucks
- B. If they were to lose the compression station, could only do ¾ day. Need backup delivery method of fuel.
 - i. Currently 30 CNG Slow-fill stations, need 35 (now, 2021 needs)
- C. Would like covered parking, canopy system for weather protection

4. SANITATION AT NORTH BASE

- A. Employees clock in \rightarrow go to trucks \rightarrow exit gate \rightarrow route \rightarrow Park to refuel
- B. Bret: Proposed diagram of North Base
 - Centered maintenance at straight line with drive-thru bays
- Majority of accidents happen at parking stations, etc.

Page 2 of $\overline{2}$ ADG Project No. 21-035

- D. Method of egress for cars / vehicles needs attention
- E. Sanitation fleet fluids / chemicals stored at Fleet maintenance





Meeting Minutes

Date: 01.07.2022 In Attendance - Name / Organization:

T. Blatt / Blatt Architects Time: 9:00 AM

Meeting No: 007 SM. Hendrickson / ADG

Virtual, Via Teams Location: H. Osgood / City of Norman

ADG Project Name: North Base Master Plan

21-035

Purpose: **Operations Interview: Stormwater**

GENERAL NOTES / OPERATIONS

A. Crew chiefs: paperwork

ADG Project Number:

i. Offices: hold crew and crew chief

ii. Breakroom

B. Staffing numbers are good? Organization chart and staffing study to be provided

C. Office: current offices are sufficient

i. Division is very understaffed

ii. Study completed: recommended three additional crews and subsequent equipment. Does not account for future growth requirements

D. Parking: all full

E. Welding bay used regularly (8-9 times / week)

Custom grate fitting

ii. Only certain metals used / Stormwater needs

iii. Storage of welding materials

SITE NAVIGATION

A. Hans: "Navigate site OK"

B. Future growth: vehicle access

C. Competing entry and exit space

D. If at North Base - Safety concerns with crossing other aeras during a snowstorm. Currently can get trucks in and out of Lindsey yard in three (3) minutes

SALT / BRINE

A. Brine: Love it, have enough

i. Two 2000 gallon tanks

ii. Could transition to more brine usage, would need more storage

- iii. Current system could keep up (increase) with production
- iv. Storage big concern
- v. Water and two (2) sand trucks used to run brine system. If two additional tanks added, would increase number of trucks to eight (8).

B. Salt:

- i. Undersized and not to regulation
 - a. 3 sides enclosed with catch basin
- ii. Truck loading salt/ sand is very inefficient
- iii. 27 semis deliver salt to Lindsey (and still not enough)
- iv. Need single location for salt

4. STORAGE

- A. Storage for construction debris/ haul off currently stage debris and haul to a construction site, need more storage when site is not available for use.
 - Stockpile stormwater pipe, aggregate, red dirt
 - ii. Utilize 4-5 acres on adjacent OU property currently
- B. Stockpiles of sand / dirt
- C. Vertical storage would definitely help
 - i. 30 x 40 area for racks
 - ii. Need a forklift; have skid steers loaned out to crew
- D. Storage for inventory / parts: "That would be nice, but we would need funding to purchase ahead of time"
- E. Corrosive / hazardous materials: chemical building in back of site

5. FLEET AND EQUIPMENT

- A. Division has largest equipment in the City → run snow / ice operations
- B. Same equipment as Streets
 - i. Staff to share list of equipment, staffing
- C. See Snow / Ice for a list of their trucks
- D. Would like to switch to electric, bigger than natural gas
 - i. Current fuel: Diesel and CNG island
- E. Camera truck needs internet connection to download data ((CAT cable); power and ethernet
- F. Ask Fleet for equipment list by division

SNOW / ICE

- A. Shortage of protected parking; sweeper shave ice equipment with water lines (cannot freeze)
- B. Fleet
 - i. Sweepers, flush truck and trailer, hot oil, water trucks (8 vehicles total)
 - ii. All vehicles approximately 10' W x 12-14' L, need size of trailer
- C. If weather is below freezing then all bays are full



7. WEATHER / ICE EVENTS

- A. Generators absolutely needed
- B. Notifiers on vehicles/equipment of freezing temps are controllers on equipment
- C. Cleaning trees after natural disaster (Parks helps with this)
- D. Need 24/7 response / operations for when necessary



Meeting Minutes

Date: 12.22.2021

Time: 2:00 PM

Meeting No: 004

Location: Virtual, Via Teams

ADG Project Number: 21-035

ADG Project Name: North Base Master Plan

Purpose: Operations Interview: Streets

In Attendance - Name / Organization:

T. Blatt / Blatt Architects

SM. Hendrickson / ADG

J. Hill / City of Norman

R. Wilkerson / City of Norman

A. Kerr / City of Norman

1. GENERAL NOTES

- A. Fueled in the field, no fueling at Lindsey
- B. No personal vehicles used for work
- C. Growth: 23 streets, 22 stormwater
- D. 800+ miles of roadway maintained
- E. +10% increase on growth
- F. 60% work contracted out, 40% self-performed
 - i. Road and bridge maintenance
 - ii. Some general maintenance
 - iii. Financial burden? No, viewed as a "win-win"

2. LINDSEY SITE

- A. Security / lighting
- B. Ease of access
- C. Flow of Lindsey is stressful
 - i. Ice event: take stationary equipment that blocks access to salt barn
- D. Snow and ice control
 - i. Vehicle access and flow

3. STORAGE

- G. "Problem child" of storage
- E. Ancillary storage
 - i. Aggregate, top soil, debris for rip rat, stored on OU side of Lindsey
 - ii. Staging spot



F. Salt storage

- i. More real estate, load equipment
- ii. Salt dome?
- iii. Brine: Needs to be doubled in size (at least)
 - a. 1 brine truck
 - b. 24-hour brine distribution and creation
 - c. More of a future than salt

4. ADMINISTRATION / INTERIORS

- A. Joe Hill to provide color-coded equipment list
- B. Will fill out interior programs
 - i. Will write narrative
- C. Internally: crew chiefs operate out of closets
 - i. Need a spot to dock with technology
 - ii. 30-60 days worth of tickets
 - iii. Could be made digital
- D. Breakroom: big lunch day
 - i. 33: streets, 60 with streets and stormwater



Meeting Minutes

Date: 12.22.2021

Time: 3:30 PM

Meeting No: 003

Location: Virtual, Via Teams

ADG Project Number: 21-035

ADG Project Name: North Base Master Plan

Purpose: Operations Interview: Utilities

In Attendance - Name / Organization:

T. Blatt / Blatt Architects

SM. Hendrickson / ADG

1. GOALS FOR MASTER PLAN, NORTH BASE SITE

A. Water service: relocate

B. Line Maintenance and ancillary buildings

i. Award CM in summer, start late fall 2022

ii. Staring stie with ECOC

iii. Everything will be off of North Base site

C. Welding / servicing of storage containers – south location

i. By water reclamation. Solid waste transfer, compost operations

FLEET

- A. Wash bay for trash trucks
- B. Recycling: 3-4 trucks
- C. Number of new trucks in the future, using 1.7% growth (by 2060)
 - i. Recycle, +3
 - ii. Yard Waste, +6
 - iii. Residential, +9
 - iv. Commercial, +7
- D. Only Utilities fleet vehicles on North Base are sanitation trucks
 - i. Use CNG slow fill
 - ii. Goddard \rightarrow lot \rightarrow check in \rightarrow door to fleet area \rightarrow load truck and go
- E. Number of slow fill islands needed: 25+

3. NORTH BASE NEEDS

A. Tornado Shelter: hardened room



- B. Covered parking for fleet, block heaters
 - i. Safe room / locker room
- C. Climate controlled storage?
- D. Driver growth more anticipated than office space needs
- E. Turning radiuses
 - i. Right turn to Flood is ok, left turn to Flood is a night mare



Meeting Minutes

Date: 01.04.2022 In Attendance - Name / Organization:

Meeting No: 006

SM. Hendrickson / ADG

ADG Project Name: North Base Master Plan

J. Short / City of Norman

Purpose: Operations Interview: Traffic

1. GENERAL NOTES

A. Storage: need climate-controlled, protected from elements (primarily water-proofed)

i. Traffic control items and traffic paint are the ones requiring climate-controlled space, everything else just need to be protected from elements

1.A.i.1. Paint stored in 5 gallon buckets

1.A.i.2. Beads stored in pallets - shelf life of one (1) year

B. No plans on moving into Old Sanitation building, need to find location for Traffic Management Center

C. Trash: two dumpsters shared with Line Maintenance; recycling attended to once per week

D. Staffing study provided in separate document

2. FLEET

- A. Only 1 bucket truck... in recall
 - i. Can borrow from other departments that have bucket trucks
 - ii. Need 2 now. In 10 years, 3
- B. City vehicles for work (mix of CNG and petrol)
 - i. Lot of challenges with CNG, looking at hybrids
 - ii. Will have portion of fleet be electric vehicles in the future
- C. Bay space approximately 15', need approximate square footage
 - i. 1 sign bay, houses sign truck
 - ii. 1 paint bay, houses paint unit
- D. Bucket truck stored in separate building

EQUIPMENT

- A. Need to shelter air compressor covering is not adequate
- B. Larger welding, functions for cutting/grinding posts



- i. Welding bay would be useful
- C. Forklift is shared is one enough? Definitely would be better with 2
 - i. Fleet has a smaller one

4. STORAGE

- A. Traffic staff to share pictures of inside storage building
- B. Paint inventory: supply chain issues (and storage) affect procurement
- C. Vertical storage: Racks are utilized, could use more and they would be filled
- D. Outside storage: Not sufficient, constantly condensing
 - i. All on ground; Contractor has to drive in and back out
 - ii. Area behind Taffice building is currently used by Utilities. When Utilities relocates, then Traffic can use that space
- E. No bulk fluids
- F. Chemicals: spray paint, propane, concrete sealant, thermo-blast
- G. Fire lockers for flammable

REGULAR FUNCTIONS / OPERATIONS

- A. Day to day:
 - i. Traffic sign maintenance
 - ii. Barricades ("Road work ahead"); Type 3
 - iii. Traffic signal maintenance
 - a. Small portion contracted out
 - iv. Parking meter and pay station maintenance
 - v. Radar speed detector trailer (5x7) Qty 3
 - vi. Programming technology done on site or on location
- B. Rinsing out paint rig \rightarrow need a space for this
 - i. New wash bay?
 - ii. Have to displace employees to clean

BUILDING AND INTERIOR SPACES

- A. Employee lockers in paint bay
- B. Breakrooms / training space / meeting space
 - i. Safety meeting once a month with Safety Director
- C. Public interaction: Trash bags, rent barricades (like for sorority 5Ks)
- D. Need more visitor parking spaces
- E. Storing documents: work orders, documents
 - i. Long term goal: digital storage or system
- F. Need a gathering place possibly shared cooking space/outdoor space

7. ADMINISTRATION / STAFFING

A. Staff numbers

- i. 1 office, need at least 3
- ii. 1 space traffic
- iii. 1 sign maintenance

Re: Operations Interview: Traffic

- iv. No place for employee evals
- v. Restrooms mainly storage rooms
- vi. Staff do own janitorial services
- vii. Required square footages to receive at a later date
- 8. SET UP TOUR OF TRAFFIC OPERATIONS FOR ADG | BLATT



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ECONOMICS

APPRAISAL REPORT OF

±5.2-ACRE TRACT OF LAND AS IF VACANT & UNIMPROVED (SITE OF NORMAN STREET MAINTENANCE FACILITY)
SOUTH SIDE OF EAST LINDSEY STREET
DUE WEST OF THE BURLINGTON NORTHERN
& SANTA FE RAILROAD
NORMAN, OKLAHOMA

EFFECTIVE DATE OF APPRAISAL

DECEMBER 19, 2022

DATE OF REPORT

DECEMBER 23, 2022

PREPARED FOR

MS. SARAH MARGARET HENDRICKSON, NCIDQ, ASID PROGRAM MANAGEMENT ADG/BLATT ARCHITECTS 920 WEST MAIN STREET OKLAHOMA CITY, OKLAHOMA 73106

PREPARED BY

JIM R. ARTMAN
ARTMAN APPRAISAL COMPANY
4612 FOXBOROUGH COURT
NORMAN, OKLAHOMA 73072
(CERTIFIED GENERAL APPRAISER NO. 10289CGA)

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ARTMAN APPRAISAL COMPANY

4612 FOXBOROUGH COURT NORMAN, OKLAHOMA 73072

Phone: (405) 360-1444 E-Mail: artman11@cox.net

December 23, 2022

Ms. Sarah Margaret Hendrickson, NCIDQ, ASID Program Management ADG/Blatt Architects 920 West Main Street Oklahoma City, Oklahoma 73106

Re: ±5.2-acre tract of land as if vacant & unimproved
 (Site of Norman Street Maintenance Facility)
 South side of East Lindsey Street
 Due west of the Burlington Northern & Santa Fe Railroad
 Norman, Oklahoma
 Owner of Record: City of Norman

Dear Ms. Hendrickson:

Pursuant to your request, I am submitting this appraisal report on a ±5.2-acre tract of land (as if vacant and unimproved) located on the south side of East Lindsey Street due west of the Burlington Northern & Santa Fe Railroad in Norman, Oklahoma. The subject property is the site of the existing Norman Street Maintenance Facility. This property is more particularly described in the following appraisal report.

The directed purpose of this appraisal was to estimate the market value of the fee simple interest in the property, subject to the assumptions and limiting conditions as set forth. The client for this appraisal is ADG/Blatt Architects and the intended users include ADG/Blatt Architects, the City of Norman, and the University of Oklahoma. The intended use of the appraisal is for use in the acquisition of the property by the University of Oklahoma. The appraisal has been prepared in compliance with the Uniform Standards of Professional Appraisal Practice (USPAP) promulgated by the Appraisal Standards Board of the Appraisal Foundation.

Ms. Sarah Margaret Hendrickson December 23, 2022 Page 2

Based upon this appraisal, it is the appraiser's opinion that the market value of the fee simple interest in the subject property as if vacant and unimproved as of December 19, 2022 is:

MARKET VALUE OF SUBJECT PROPERTY AS IF VACANT & UNIMPROVED

ONE MILLION FOUR HUNDRED FIFTEEN THOUSAND DOLLARS (\$1,415,000.00)

Thank you for the opportunity to be of service. I trust you will find this report satisfactory.

Respectfully submitted,

Jim R. Artman

Certified General Appraiser No. 10289CGA

ASSUMPTIONS AND LIMITING CONDITIONS

The interest in the surface rights to the subject property has been appraised subject to the following conditions:

1. No responsibility is assumed for matters of legal nature affecting title to the property nor is an opinion of title rendered. The title is assumed to be good and marketable. The value estimate is given without regard to any questions of title, boundaries, encumbrances or encroachments.

It is assumed that there is full compliance with all applicable federal, state and local environmental regulations and laws unless non-compliance is stated, defined and considered in the appraisal report.

It is assumed that all required licenses, consents, or other legislative or administrative authority from any local, state, or national government, or private entity, or organization have been or can be obtained or renewed for any use on which the value estimate contained in this report is based.

2. It is assumed that the utilization of the land and improvements is within the boundaries of the property lines of the property described and that there is no encroachment or trespass unless noted within the report.

No survey of the property has been made by the appraiser and no responsibility is assumed in connection with such matters. Any maps, plats, or drawings reproduced and included in the report are intended only for the purpose of showing spatial relationships. The reliability of the information contained on any such map or drawing is assumed by the appraiser and cannot be guaranteed to be correct.

- 3. It is the opinion of the appraiser that all information in this report has been obtained from reliable sources and is substantially correct, but he assumes no liability in respect thereto.
- 4. All plans, sketches, and other exhibits are included in this report only for assisting the reader in visualizing the property and the data pertaining to the property. Some of the sketches are not drawn to scale.

- 5. Possession of this report does not grant the right to reproduce any or all of the report, unless prior approval has been given.
- 6. This appraisal should not be considered a report on the physical items that are a part of the property. Although the appraisal may contain information about the physical items being appraised (including their adequacy and/or condition), it should be clearly understood that this information is only to be used as a general guide for property valuation and not as a complete or detailed physical report. The appraiser is not a construction, engineering, or legal expert and any opinion given on these matters in this report should be considered preliminary in nature.
- 7. The observed condition of the foundation, roof, exterior walls, floors, heating, ventilation and air conditioning (HVAC) system, plumbing, insulation, electrical service, mechanical systems, and construction is based on a casual inspection only and no detailed inspection was made. For instance, the appraiser is not an expert on heating systems and not attempt was made to inspect the interior of the furnace. The structures were not checked for building code violations and it is assumed that all buildings meet the building codes unless otherwise stated in the report.

Some items such as conditions behind walls, above the ceiling, behind, locked doors or under the ground are not exposed to casual view and, therefore, were not inspected. The existence of insulation (if any is mentioned) was found by conversation with others and/or circumstantial evidence. Since it is not exposed to view, the accuracy of any statements about insulation cannot be guaranteed.

It is assumed that there are no hidden or unapparent conditions of the property, sub-soil, or structures which would render it more or less valuable. No responsibility is assumed for such conditions or the engineering which may be required to discover such factors. Since no engineering or percolation tests were made, no liability is assumed for soil conditions. Sub-surface rights (mineral or oil) were not considered in making this appraisal.

Because no detailed inspection was made, and because such knowledge goes beyond the scope of this appraisal, any observed condition comments given in this report should not be taken as a guarantee that a problem does not exist. Specifically, no guarantee is made as to the adequacy of condition of the foundation, roof, exterior walls, interior walls, floors, heating, ventilation and air conditioning (HVAC) system, plumbing, electrical system, insulation, or any other detailed construction matters. If any interested party is concerned about the existence, condition, or adequacy of any particular item, the appraiser would strongly suggest that a construction expert be hired for a detailed investigation.

8. Information (including projections of income and expenses) provided by informed local sources, such as government agencies, financial institutions, realtors, buyers,, sellers, property owners, bookkeepers, accountants, attorneys, and others is assumed to be true, correct, and reliable. No responsibility for the accuracy of such information is assumed by the appraiser.

The comparable sales data relied upon in this appraisal is believed to be from reliable sources. Though all the comparable sales were examined, it was not possible to inspect them all in detail. The value conclusions are subject to the accuracy of said data.

Engineering analyses of the subject property were neither provided for use nor made as a part of the appraisal contract. Any representation as to the suitability of the property for uses suggested in this analysis is, therefore, based only upon a rudimentary investigation by the appraiser and the value conclusions are subject to said limitations.

All values shown in the appraisal report are projections based on an analysis as of the date of the appraisal. These values may not be valid in other time periods or as conditions change. Since the projected mathematical models are based on estimates and assumptions which are inherently subject to uncertainty and variation depending upon evolving events, we do not represent them as results that will actually be achieved.

This appraisal is an estimate of value based on an analysis of information known to the appraiser at the time the appraisal was made. If new information of significance comes to light, the value given in this report is subject to change without notice.

- 9. Only when prior arrangements have been made will the appraisers be required to attend any court and give testimony pursuant to any portion of this report.
- 10. This appraisal shall in no way be combined with other appraisal reports.
- 11. The appraisal report shall not be quoted or referred to in any report or financial statement or in any documents filed with any governmental agency without the prior written consent of the appraiser. Neither all nor any part of the contents of the appraisal report shall be disseminated to the public through advertising media, public relations media, news media, sales media, or other public means of communication without the prior written consent and approval of the appraiser.
- 12. The value concluded in this report is based upon the entire report and should not be accepted as an indication of value if any part is used separate from the entire report.
- 13. Unless otherwise stated in this report, the existence of hazardous material, which may or may not be present on the property, was not observed by the appraiser. The appraiser has no knowledge of the existence of such materials on or in the property. The appraiser, however, is not qualified to detect such substances. The presence of substances such as asbestos, urea-formaldehyde foam insulation, or potentially hazardous materials may affect the value of the property. The value estimate is predicated on the assumption that there is no such material on or in the property that would cause a loss in value. No responsibility is assumed for any such conditions, or for any expertise or engineering knowledge required to discover them. The client is urged to retain an expert in this field, if desired.

14. It is assumed that the property meets all requirements set forth by the Americans With Disabilities Act unless otherwise noted in the appraisal.

DATE: __December 23, 2022_

Jim R. Artman

Jen R. artma

Certified General Appraiser

No. 10289CGA

SUMMARY OF SALIENT FACTS AND CONCLUSIONS

Property Type: Vacant & unimproved land

Property Location: South side of East Lindsey Street due west of

the Burlington Northern & Santa Fe Railroad (Site of Norman Street Maintenance Facility)

Norman, Oklahoma

Effective Date

Of Appraisal: December 19, 2022

Date of Report: December 23, 2022

Property Rights

Appraised: Fee simple interest or fee simple estate

Owner of Record: City of Norman

Site: Irregular shaped interior site with an area

of ± 5.2 acres.

Zoning: "R-1" Single-family Dwelling District

(Norman 2025 Land Use & Transportation Plan designates the future use as institutional as it is the site of the City of Norman Street Maintenance Facility. However, the property can be rezoned for another use - most likely multi-family residential, commercial, or

mixed use).

Highest and

Best Use: Multi-family residential use, commercial use,

or mixed use.

Improvements: None included. No consideration or value has

been given to any improvements (buildings, paving, or fencing) on site as the property is being valued as if vacant and unimproved.

Market Value As If

Vacant & Unimproved: \$1,415,000

PURPOSE OF APPRAISAL:

The purpose of this appraisal is to estimate the market value of the fee simple interest in the subject property as if vacant and unimproved, subject to the restrictions of record and assumptions and limiting conditions as set forth.

"Market Value" is defined as follows:

The most probable price which a property should bring in a competitive and open market under all conditions requisite to a fair sale, the buyer and seller each acting prudently, knowledgeably and assuming the price is not affected by undue stimulus. Implicit in this definition is the consummation of a sale as of a specified date and the passing of title from seller to buyer under conditions whereby:

- 1. the buyer and seller are typically motivated;
- 2. both parties are well informed or well advised and each acting in what they consider their own best interest;
- a reasonable time is allowed for exposure to the open market;
- 4. payment is made in terms of cash in U.S. dollars or in terms of financial arrangements comparable thereto; and
- 5. the price represents the normal consideration for the property sold unaffected by special or creative financing or sales concessions granted by anyone associated with the sale.

(Definition per FIRREA. 12 C.F.R., Part 34.42(g); 55 Federal Register 34696, August 24, 1990, as amended at 57 Federal Register 12202, April 9, 1992; 59 Federal Register 29499, June 7, 1994)

EFFECTIVE DATE OF APPRAISAL:

The effective date of appraisal for this assignment is December 19, 2022. The subject property was inspected by the appraiser on two occasions, the most recent of which was December 19, 2022.

DATE OF REPORT:

The date of this report is December 23, 2022.

PROPERTY RIGHTS APPRAISED:

The property rights appraised are those of "Fee Simple Estate," as if unencumbered by mortgages or liens, exclusive of any material interest and subject to zoning, easements, and restrictions of record. "Fee Simple Estate" is defined as:

"Absolute ownership unencumbered by any other interest or estate subject only to the limitations imposed by the governmental powers of taxation, eminent domain, police power, and escheat." (The Dictionary of Real Estate Appraisal, Fourth Edition, 2002, Appraisal Institute)

Fee simple estate is also referred to as "fee simple interest".

FUNCTION OF APPRAISAL:

The function of the appraisal is to inform the client of the market value of the fee simple interest in the property as if vacant and unimproved, subject to the restrictions of record and the assumptions and limiting conditions as set forth. The client for this appraisal assignment is ADG/Blatt Architects. The intended users of this appraisal report are ADG/Blatt Architects, the City of Norman, and the University of Oklahoma. The intended use of the appraisal is for use in the acquisition of the property by the University of Oklahoma.

SCOPE OF APPRAISAL:

According to the Uniform Standards of Professional Appraisal Practice (USPAP), it is the appraiser's responsibility to determine the appropriate scope of work. The scope of work must be sufficient to develop credible assignment results.

USPAP defines "scope of work" as follows:

"The type and extent of research and analyses in an assignment."

Scope of work includes, but is not limited to, the following:

- the extent to which the property is identified;
- the extent to which tangible property is inspected;
- the type and extent of data researched; and
- the type and extent of analyses applied to arrive at opinions or conclusions.

The scope of work utilized in this appraisal is intended to be commensurate with the type and complexity of its purpose. According to the client (ADG/Blatt Architects), the intended use of the appraisal is for use in the acquisition of the property by the University of Oklahoma. This appraisal has been prepared in compliance with the Uniform Standards of Professional Appraisal Practice (USPAP) promulgated by the Appraisal Standards Board of the Appraisal Foundation.

The scope of work includes various independent investigations and analyses made by the appraiser which are briefly described as follows:

- (1) A physical inspection of the property was made by the appraiser on two occasions, the most recent of which was December 19, 2022.
- (2) An analysis of the plot plan for the property as well as all physical characteristics, zoning, availability of utilities, easements, highest and best use, and other site factors pertinent to the site was completed.
- (3) An analysis of the subject market area, the subject neighborhood, and current market conditions in the area was completed, particularly with respect to the market for comparable unimproved tracts of land with similar highest and best use.
- (4) A search of the general area was conducted for recent sales of comparable unimproved tracts of land with similar highest and best use (multi-family residential use, commercial use, or mixed use).
- (5) The market value of the property was estimated utilizing the Sales Comparison Approach, the only applicable approach to value.

The process of preparing this appraisal report involved the utilization of public as well as private data sources which include Multiple Listing Services, Real Estate Appraisal Data, Inc., the County Assessor's records, the County Clerk's records, local realtors and brokers, lenders, appraisers, buyers, sellers, and other professionals possessing pertinent knowledge relating to this specific appraisal assignment. The subject site and the comparable

sales utilized in this appraisal have been personally inspected by the appraiser.

LEGAL DESCRIPTION:

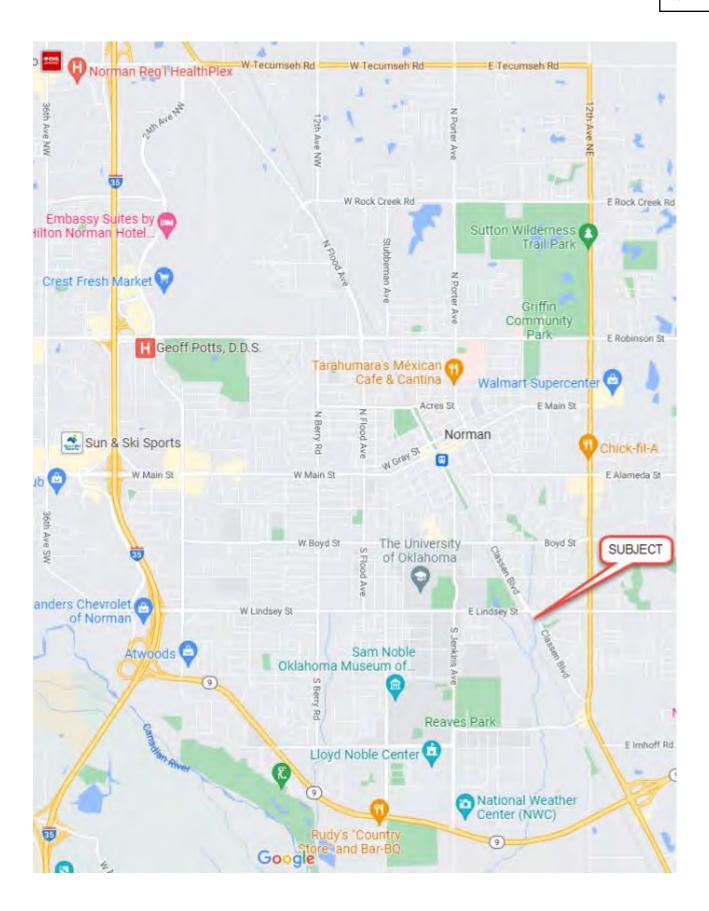
Part of Section Five (5), Township Eight (8), Range Two (2) West, of the I.M., Cleveland County, Oklahoma, more particularly described as follows:

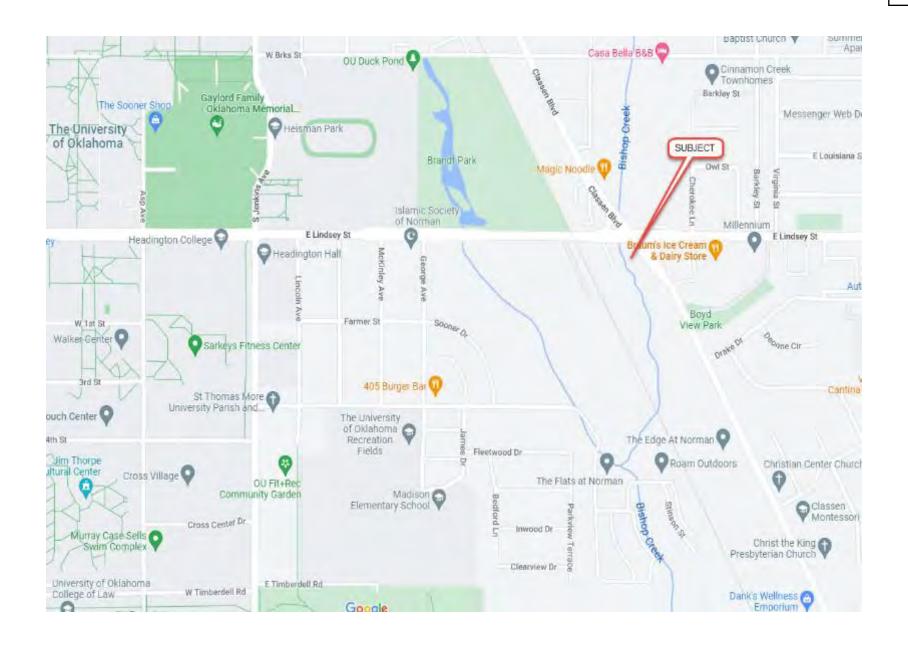
All that part of the East Half (E/2) of the Northeast Quarter (NE/4) and Government Lot 3 lying West of the Atchison Topeka & Santa Fe Railroad right-of-way.

This legal description is from the Cleveland County Assessor's records and is believed to be correct. The exact legal description of the property can be determined by a professional survey of the property.

OWNERSHIP HISTORY:

The current owner of record for the subject property is the City of Norman. The subject property has not sold or changed ownership within the past three years. The subject property is not currently listed for sale.





NORMAN OKLAHOMA



Dawntown Norman

Oklahoma's Best Place to Live

-Movoto Real Estate, 2014

America's Second Least Expensive City to Live in

-Cost of Living Index, 2014

NORMAN OKLAHOMA



is a dynamic, diverse community with a vivid history and a vibrant future! Strategically located in the bustling Oklahoma City metropolitan area, Norman is in the center of the county on busy Interstate 35. With a short drive to downtown Oklahoma City and to DFW and with flights from Will Rogers World Airport to destination hubs all across the U.S., Norman has easy access to anywhere in the world.

Home to the state's premier research university, the University of Oklahoma, Norman is teeming with incredible talent. Energetic, educated students continually feed a strong, stable workforce in a region known for its solid work ethic.

And we intend to keep those students here after graduation. The residents of Norman recently voted overwhelmingly in support of a one-half percent sales tax to fund \$148 million in quality of life investments in parks, libraries, recreational facilities, sports complexes, trails and public art. The initiative, called NORMAN FORWARD, underscores out citizens' remarkable commitment to Norman's future!

Contributing to the quality of life is a premier park system, quality golf courses and Lake Thunderbird State Park's recreational opportunities that include boating, fishing, bird watching and hiking. Year-round festivals, fairs and Main Street events create a friendly, hometown atmosphere among big city amenities, arts and culture.

From the historic downtown to numerous shopping centers and malls, Norman has a myriad of shopping options from national stores to local boutiques.

Norman Regional Health Systems provides the best in health and preventative care. The Norman Public School System consistently scores above the state averages in every sector of testing. The Moore Norman Technology Center has received a long list of awards and accreditations.

Major employers offering quality jobs opportunities include Johnson Controls, National Oceanic and Atmospheric Administration (NOAA), Weathernews, Hitachi, SYSCO Foods, Chickasaw National Industries and Astellas. Some of the local emerging employers include AGIO, Health Engineering Systems and Immuno-Mycologics (IMMY).

We are a thriving community with purpose and drive... and our only direction is NORMAN FORWARD!

Lynne Miller, Mayor



ONE VISIT and you'll know why we call Norman HOME.



Campus Come



POPULATION NORMAN



Norman median resident age: 30.3 years Oklahoma median resident age: 36.3 years

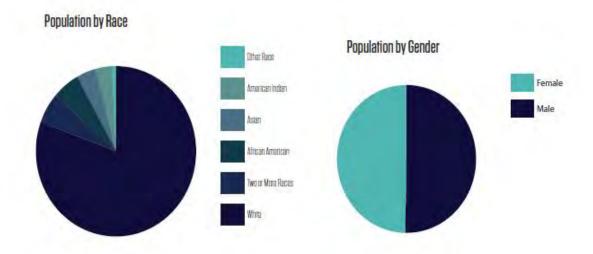
Norman cost of living index is 83.8%, which is 16.2% below the national average

Norman Population

120,866

Population Growth Since 2000

+21.4%



TRANSPORTATION NORMAN



LOCATION

Conveniently located on I-35, Norman provides easy accesss to markets across the nation. Only 20 miles south of I-40 and 30 miles south of I-44, Norman sits in the middle of America, a perfect location for all business. Norman is located in the Central Standard Time Zone in the United States.

NORMAN FACTS

County: Cleveland

Nearest Major City: Oklahoma City, 17 miles

City Size in Square Miles: 190

Elevation: 1,170 ft.

NORMAN TRAFFIC COUNTS

Tecumseh & I-35	16,764 AVPD
Robinson & 36th Ave NW	20,696 AVPD
Robinson & I-35	25,725 AVPD
Main & 36th Ave NW	17,199 AVPD
Porter & Alameda	13,548 AVPD
Alameda & 12th Ave E	28,479 AVPD
Lindsey & I-35	20,923 AVPD
*AVPD (Average Vehicles Per Day	y)

DISTANCES TO MAJOR CITIES

Dallas	189 miles
Little Rock	344 miles
Kansas City	367 mtles
Houston	516 miles
St. Louis	516 mtles
Albuquerque	562 mtles
Denver	694 miles
Chicago	811 miles

WILL ROGERS WORLD AIRPORT, OKLAHOMA CITY

Distance from Norman: 20 miles

Major airlines include: Allegiant, US Airways, Delta, Frontier, United and Southwest

Major freight carrier services include: Airborne Express, BAX global, Evergreen Eagle, FedEx, Integrated Airline Services, UPS and the U.S. Postal Service

MAX WESTHEIMER AIRPORT, NORMAN

Located in the University of Oklahoma Research Park, Max Westheimer Airport serves both business executives and recreational pilots. With runway lengths of 5,200 feet north/south and 4,750 feet northeast/southwest the airport has medium intensity runway and approach lights with Visual Approach Slope Indicators serving executive jet aircraft. The control tower operates seven days a week from 8am to 10pm. AV Gas and Jet A are available from 6am to 10pm. FBO is provided by Cruise Aviation Association Inc., which sells fuel and performs aircraft repair. A flight school is provided through the University of Oklahoma Aviation Division.

PUBLIC TRANSPORTATION

The Cleveland Area Rapid Transit (CART) Service provides a comprehensive public transportation system around the Norman area and links to Oklahoma City.

Greyhound Lines Inc. provides service in Norman.

The Port of Catoosa is the nearest river port, approximately 100 miles away.

RAILROAD

Norman's train station, located right off Main Street, has daily stops on the AMTRAK Heartland Flyer line between Oklahoma City and Fort Worth, Texas. Norman is also on the main line of the Santa Fe/Burlington Northern Railroad.

BUSINESS INCENTIVES NORMAN



THE OKLAHOMA QUALITY JOBS PROGRAM

This incentive program provides quarterly cash payments of up to 5% of newly created gross taxable payroll to a qualifying company. A fully executed contract with the Oklahoma Department of Commerce must be in place before any new direct job's salaries are included in the new taxable payroll. Payments are made quarterly for three years and if thresholds are achieved, they may extend for an additional seven years.

EMPLOYEE TRAINING FOR INDUSTRY

The Oklahoma Department of Career and Technology Education (Career Tech) assists qualifying businesses by paying for training for employees in newly created jobs. Training can be done at one of 56 Technology Centers, including Moore Norman Technology Center (www. mntechnology.com) here in Norman, or at the company's facility. Training agreements include instructor costs. Program services are determined by the number of new jobs created in targeted industries, wage rates, and benefits provided.

SMALL EMPLOYER QUALITY JOBS

This program provides annual cash payments to a qualifying company. The payments may reach as much as 5% of new taxable payroll and last for up to seven years.

AD VALOREM TAX EXEMPTIONS

Several companies may be eligible for ad valorem exemptions for up to five years, including: new and expanding qualifying manufacturers, research and development companies, certain computer services and data processing companies with significant out-of-state sales and aircraft repair and distribution companies.

EXEMPT INVENTORY

Oklahoma's Freeport Law exempts from taxation any goods, wares, and merchandise which come from outside the state and leave the state within nine months where such goods, wares, and merchandise are held for assembly, storage, manufacturing, processing or fabricating purposes within the state.

21st CENTURY QUALITY JOBS

The intended purpose of the program is to promote impactful high wage jobs without competing with existing incentives. To help accomplish this, an enhanced list of qualifying industries beyond just those eligible for the Quality Jobs Program has been added. Qualifying companies may be eligible for up to twice the Net Benefit rate of the Quality Jobs program, or 10% of the taxable payroll of these new jobs, to be paid on a quarterly basis. The program lasts for up to 10 years.

* For a complete list of Oklahoma business incentives, visit www.okcommerce.gov.

Income Tax	
Personal Income Tax: Corporate Tax Rate:	5.25% max 6.0%
Property Tax (Ad Valorem)	
City: County: Public Schools: Technology: Total: *Valuation is 12% of Fall Market v	\$ 14.00 \$ 23.07 \$ 64.46 \$ 18.90 \$120.43 Value per thousand of assessed value
Sales Tax	
State of Oklahoma: City of Norman: Cleveland County:	4.5% 4.00% 0.25%

LABOR NORMAN



MAJOR EMPLOYERS

THE STATE OF LETTE	
The University of Oklahoma:	12,94
Norman Regional Hospital:	3,040
Norman Public Schools:	1,806
Johnson Controls:	1,030
Walmart Supercenters:	950
City of Norman:	859
Riverwind Casinos:	838
Hitacht:	460
National Oceanic & Atmospheric	
Administration (NOAA):	400
Super Target:	380
Oklahoma Veterans Center:	350
U.S. Postal Service - NCED:	350
SYSCO Foods:	337
Cimarron Energy:	275
SITEL:	264
Arvest Bank:	258
Moore-Norman Technology Center:	246
Avara Technologies:	250
AT&T:	225
Chickasaw Nation Industries:	163
Thunderbird Casino:	190
Republic Bank & Trust:	150
Power Cost, Inc.:	140
Southwestern Wire:	135
MCSI:	123
Top of the World:	100

*Please note that employee numbers are subject to change.

Unemployment Rate (%)



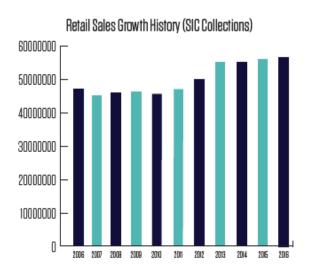
MEDIAN WAGE

\$39.38
\$28.99
\$21.80
\$19.20
\$34.44
\$13.04
\$ 9.86
\$12.34
\$20.32
\$14.39
\$15.55
\$18.63
\$20.39
\$15.29
\$13.02
\$10.50
\$ 8.78
\$34.41
\$28.67
\$26.68
\$19.91

EMERGING EMPLOYER

Atmospheric Technology Services	
Company:	99
Weather Decision Technology:	85
StoneHouse Marketing:	81
Weathernews:	67
AGIO:	58
Immuno-Mycologics:	40
Health Engineering Systems:	35

INCOME & SHOPPING NORMAN



UNIVERSITY TOWN CENTER

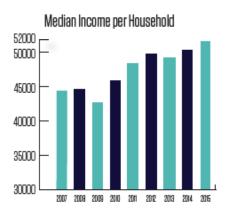
Located north of Robinson Street just off I-35, University Town Center brings Oklahoma the finest in open-air shopping, including Target, Kohls, PetCo and many more. With Phase I completed already, this center has future plans of a movie theatre, eight-acre park and two more hotels as well as expanding the selection of department stores. Upon completion University Town Center will be more than 2 million square feet.

HISTORIC DOWNTOWN NORMAN

A unique mixture of antique shops, coffee bars, art galleries and restaurants, downtown Norman provides the classic downtown feel with an artsy edge.

BROOKHAVEN VILLAGE

Located at 36th NW and Robinson, Brookhaven Village features boutiques such as Chico's, Jos. A. Bank, Talbots and J. Spencer. After a long day of shopping, stop by Pub W or Louie's to watch the game.



SOONER MALL

with 70 boutiques, three large department stores, a food court and children's play station, Sooner Mall has something for the whole family. Convieniently located on Main Street off I-35, this mall provides easy access to exciting shopping, dining and entertainment. Anchor stores include Aeropostale, American Eagle, Dillard's, Eddie Bauer, Express, Gap, JC Penny, Old Navy, Sears and many more.

CAMPUS CORNER

Just across the street from the University of Oklahoma, Campus Corner offers unique shopping, delicious restaurants, stylish salons and classic pubs. With everything from trendy shops like Shoetopia and Blush to unique dining experiences like Caribbean Cuisine and Victoria's Pasta Shop, Campus Corner provides the perfect atmosphere for every occasion.

PARKWAY PLAZA

Commonly referred to as 'Restaurant Row,'
Parkway Plaza boasts countless shops, restaurants
and other specialty stores. Featuring well-known
favorites such as BJ's, Charleston's and Interurban,
Parkway Plaza runs along Ed Noble Parkway from
Lindsey to Main Street. After eating stop by one of
the many large retail chains such as Toys R Us, Bed
Bath & Beyond, and Barnes and Noble.

HOUSING NORMAN



HOUSING QUICK FACTS

Average Sales Price: \$200,811 Average Days on Market: 53

HOUSING COST

Median Real Estate Tax: \$1,996 Median Year Structure was Built: 1981 Single Family Housing Units: 50,431 Median Rent: \$848

Construction Age Earlier than 1950 1960-1969 1970-1979 1980-1989 2000-2008

Year	# of Permits	Commercial Value	Residential Value	Total Construction Value
2003	1296	\$ 42,341,237	\$ 103,486,420	\$ 145,827,657
2004	1606	\$ 54,583,537	\$ 171,409,339	\$ 225,992,876
2005	1508	\$ 49,561,566	\$ 156,204,279	\$ 205,765,845
2006	1379	\$ 46,146,469	\$ 117,824,296	\$ 163,970,792
2007	1244	\$ 221,652,412	\$ 92,393,692	\$ 314,046,104
2008	1395	\$ 72,957,512	\$ 104,068,686	\$ 177,026,199
2009	1100	\$ 116,968,254	\$ 92,393,692	\$ 191,536,967
2010	1222	\$ 73,709,847	\$ 174,568,713	\$ 166,617,474
2011	1338	\$ 117,062,375	\$ 80,104,665	\$ 197,167,040
2012	1776	\$ 85,513,383	\$ 127,466,768	\$ 212,980,151
2013	2754	\$ 84,543,886	\$ 132,909,593	\$ 217,453,449
2014	1013	\$ 85,091,436	\$ 149,843,679	\$ 234,935,115
2015	549	\$ 47,758,087	\$ 131,088,632	\$ 178,846,719
2016	667	\$ 113,244,368	\$ 197,895,839	\$ 311,140,207

EDUCATION NORMAN



Iniversity of Oklahoma Student Union

UNIVERSITY OF OKLAHOMA

Known as a major national research university, the University of Oklahoma serves the educational, cultural and economic needs of Norman, the state, region and nation. Created by the Oklahoma Territorial Legislature in 1890, OU has 21 colleges offering 171 majors at the baccalaureate level, 152 majors at the master's level, 79 majors at the doctoral level, 32 majors at the first professional level and 35 graduate certificates. OU's enrollment is more than 30,000 students and the university has more National Merit Scholars per capita than any other public university in America. Ranked in the top 10 universities in the nation by The Princeton Review, OU has produced 29 Rhodes Scholars and 51 Goldwater Scholarship recipients for math and science.

MOORE NORMAN TECHNOLOGY CENTER

With a reputation for excellence, MNTC is viewed as one of the nation's premier educational and training institutions.

Accredited by the North Central Association Commission on Accreditation and School Improvement, MNTC provides high school and adult students a quality and affordable career through a technical education. Moore Norman Technology Center also provides professional assistance to businesses in order to help them achieve their business goals.

UNIVERSITY OF PHOENIX

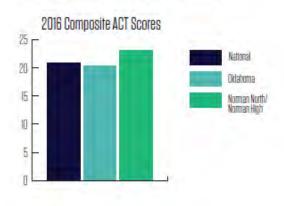
Targeted towards working adults, the University of Phoenix offers the flexibility of obtaining a bachelor's or master's degree while working full time. With a complete online program, students can earn their bachelor's degree in eight different programs or their master's degree in seven specialized areas.

EDUCATION NORMAN



NORMAN PUBLIC SCHOOLS (NPS)

Recognized at the state and national level for exceptional teachers and instruction programs, NPS had 11 National Merit Finalists in the 2015-2016 school year. Students from NPS continually succeed in athletics, drama, competitive speech and debate, poetry, writing, studio art, band, orchestra and student newspaper. In fact NEWSWEEK Magazine listed Norman North High School and Norman High School in the top 5% of high schools in the nation. In 2016, Norman North and Norman High scored 2 points higher than the national average on the ACT test.



DISTRICT ENROLLMENT

Elementary	7,842	
Middle School	3,452	
High School	4,650	
Total Students	15,944	

OTHER HIGHER EDUCATION INSTITUTIONS

FOUR-YEAR INSTITUTIONS

East Central University
Langston University
Mid-America Christian University
Oklahoma Baptist University
Oklahoma Christian University
Oklahoma City University
Oklahoma State University at OKC
Southern Nazarene University
St. Gregory's University
University of Science & Arts of Oklahoma
The University of Central Oklahoma

TWO YEAR INSTITUTIONS

Hillsdale Freewill Baptist College Oklahoma City Community College Rose State College

CAREER/TECHNICAL COLLEGES DKI AHDMA GITY AREA

ATI Career Training Center
DeVry University
Heritage Institute
ITT Technical Institute
Keller Graduate School of Management
TechSkills
Vatterott College
Wright Business School

BUSINESS RECOURCES NORMAN



ELECTRICITY

Oklahoma Gas & Electric Company Oklahoma Electric Cooperative

GAS

Oklahoma Natural Gas

WATER Supplier:

Lake Thunderbird/Wells Source: System Capacity: 22,350,000 GPD Daily Production: Max: 18,250,000 GPD

Min: 7,813,000 GPD

City of Norman

SEWER

Sewer Treatment Authority: City of Norman Sewage Capacity: 17,000,000 GPD

TELECOMMUNICATIONS

AT&T

Cox Communications

TELECOMMUNICATIONS SERVICES AVAILABLE

Digital Services Fiber Optics Point of Presence

BUSINESS ASSISTANCE

Norman Economic Development Coalition Jason Smith, CEcD President & CEO 128 E. Main

Norman, OK 73069 Phone: (405)573-1900

IMPORTANT WEBSITES

City of Norman: Moore Norman Technology Center: Norman Chamber of Commerce: Norman Public Schools: Oklahoma Department of Commerce: Oklahoma Employment Security Commission: www.oesc.ok.gov University of Oklahoma:

www.cityofnorman.com www.mntechnology.com www.selectnorman.com www.normanchamber.com www.norman.k12.ok.us www.okcommerce.gov www.ou.edu www.visitnorman.com

VisitNorman:

HEALTH CARE NORMAN



Norman Regional Health Plex

NORMAN REGIONAL HEALTH SYSTEM

Providing quality and compassionate health care services and education, the Norman Regional Health System (NRHS) serves the regional Norman community extending throughout south central Oklahoma. With over 2,950 employees and 356 active-staff physicians, NRHS provides outpatient diagnostic centers, medical transport services, physician services, community wellness and employer health services.

GRIFFIN MEMORIAL HOSPITAL

An adult inpatient psychiatric teaching hospital offering comprehensive services for mental health clients. The Griffin Memorial Hospital offers its patients psychiatric and psychological evaluation, psychotherapy, activities therapy, chemotherapy, and psychiatric rehabilitation.

SENIOR CARE

Norman features a vast array of services available for our senior adults, including nursing homes and senior assisted living.

OKLAHOMA VETERANS CENTER NORMAN DIVISION

Offering long-term, skilled and non-skilled nursing care to eligible Oklahoma veterans, the Oklahoma Veterans Center in Norman features a state-of-the-art, 301-bed complex.

J.D. McCARTY CENTER FOR CHILDREN WITH DEVELOPMENTAL DISABILITIES

A rehabilitation hospital where Oklahoma's children with development disabilities learn to move, act, play, think and communicate better and where parents find relief from overwhelming responsibilities. Both inpatient and outpatient care are available.

NORMAN SPECIALTY HOSPITAL

A Long-term Acute Care Hospital (LTACH) that specializes in treating patients with serious and often complex medical conditions requiring a longer length of stay, Norman Specialty Hospital focuses on building strength, improving mobility and increasing independence.

QUALITY OF LIFE NORMAN

PARKS & RECREATION

The Parks & Recreation department features a full schedule of programs. Norman has 62 parks, including a championship golf course, municipal swimming pool complex with a water slide, hiking trails, Frisbee golf course, fishing, tennis courts, playgrounds, open and covered picnic areas and indoor recreation centers. The recreation programs include sports leagues and clinics, dance and exercise classes and a senior citizens' center. The Griffin Park Sports Complex encompasses 16 soccer fields, 14 baseball/softball fields and four football fields. Norman also features a full service YMCA with an indoor pool and track.

RECREATIONAL FACILITIES

Public Recreation Centers: 3
Miles of walking trails: 14.07
Miles of bicycle routes: 120.37
Golf Courses: 6
Swimming Pools: 4
Private Health & Fitness Centers: 19

GOLF

Norman boasts two 18-hole public golf courses: City of Norman Westwood Golf Course and Jimmie Austin University of Oklahoma Golf Course, in addition to two 18-hole private courses: The Trails and Belmar Golf Club. Norman also has a nine-hole par three course at Cobblestone Creek Golf Club.

SPORTING EVENTS

Home to the University of Oklahoma Sooners, Norman sports are always in season. Consistently appearing among top ranked teams, OU football, baseball, softball, soccer, wrestling, basketball, golf and gymnastics means there is an event for every sport lover.

CHURCHES

There are over 100 churches representing a variety of different denominations in the Norman community.

HOTELS/MOTELS

Norman offers seven bed-and-breakfasts and 22 hotels and motels offering a wide variety of accommodations.

NORMAN PUBLIC LIBRARY

The Norman Public Library has over 2,000 iPhone and iPod compatible books available. The Norman branch is the headquarters of the Pioneer Library System, serving nine communities in central Oklahoma.

LAKE THUNDERBIRD STATE PARK

Just a couple miles down Highway 9, Lake Thunderbird provides outdoor enthusiasts with a 6,000-acre lake perfect for wake boarding, picnics, barbecues or just a relaxing day on the water. Complete with R.V. hook-ups, camping facilities and two full size marinas, Lake Thunderbird has everything for the perfect outdoor adventure.

DINING OUT

Norman has a wide variety of restaurants that will appeal to anyone's tastes. Cuisines represented in over 260 restaurants and cafeterias include barbecue, Asian (Chinese, Indian, Japanese, Thai), Greek, Italian, Mexican, seafood, and natural foods.

CRIME RATE

Norman crime rate per 1,000 population: 38.9%
Norman police officers per 1,000 population: 1.36
Total Norman police officers: 158
Norman fire ghters per 1,000 population: 1.39
Total Norman firefighters: 159



Lake Thunderbird







Sconer Stampede at Lake Thunderbird

ARTS + ENTERTAINMENT NORMAN



SAM NOBLE MUSEUM OF NATURAL HISTORY

On the University of Oklahoma campus, the Sam Noble Museum of Natural History brings in approximately 150,000 visitors a year to enjoy the constantly evolving selection of art and exhibits. With curators actively involved in field research around the world, the museum provides a great experience for children and families of all ages.

FRED JONES JR. MUSEUM OF ART

Described as one of the finest university art museums in the country, this museum holds the most important collection of French Impressionism ever given to an American public university. The museum also holds large collections of East Asian and Native American art including artists such as Stuart Davis, Georgia O'Keeffe and Edward Hopper.

SOONER THEATRE

Originally created for "talking pictures", the theatre opened in 1929 as the first movie theatre in the region. In 1982 the theatre reopened her doors as a community performing art center and now hosts concerts, movies, theatrical shows and more.

RUPEL J. JONES THEATRE

A 600-seat theatre featuring productions by the University of Oklahoma School of Drama, School of Dance, Musical Theater Program and OU Summer Stage Lab Theater.

FESTIVALS

Norman, the 'city of festivals', is home to over a dozen annual festivals, parades and community events. Some favorites include Norman Music Festival, Medieval Fair, Jazz in June and Groovefest.

CLEVELAND COUNTY HISTORICAL MUSEUM

An excellent example of traditional Victorian architecture, the Historical House showcases a collection of manuscripts, letters, diaries and photographs pertaining to early Norman and Oklahoma.

THE CRUCIBLE FOUNDRY

With a wide range of talents and specialties, the Foundry specializes in bronze sculptures and monumental pieces. The Crucible employes the largest kiln west of the Mississippi to create their unique masterpieces of up to 900 pounds.

FIREHOUSE ART CENTER

Founded in 1971 by three local artists, the Firehouse Art Center fosters appreciation, enjoyment and development of art. Focused exclusively on visual arts, the Center provides the community with studio classes, workshops, special programs and exhibitions.

THE JACOBSON HOUSE

Native American Art Center Bringing in art exhibits, cultural activities, lectures, workshops and educational events to the public. The Jacobson house stands as a living symbol of the recognition of Native American art as the medium speaking to every person.

THE NORMAN DEPOT

Hosting various Norman events, the Norman train station serves as a reminder of the origin of many Oklahoma towns. The restored depot serves as a station for the Heartland Flyer.







Norman Music Festival



Sponer Theate



Sam Noble Museum



Fred Jones Museum





128 E Man St Norman, OK 73069 TEL: 405-573-1900 Ernal: nedcjaselectnorman.com www.selectnorman.com

The Norman Economic Development Coalition is a joint venture of the University of Oklahoma, the City of Norman, Moore Norman Technology Center and the Sooner Centurions, a committee of the Norman Chamber of Commerce.

MARKET AREA & NEIGHBORHOOD ANALYSIS:

"Market area" is defined as "the defined geographic area in which the subject property competes for the attentions of market participants; the term broadly defines an area containing diverse land uses" (Twelfth Edition of The Appraisal of Real Estate). A "neighborhood" is defined by the Twelfth Edition of The Appraisal of Real Estate as "a grouping of complementary land uses; a related grouping of inhabitants, buildings, or business enterprises." A "district" is defined as "a market area characterized by one predominate land use e.g., apartment, commercial, industrial, agricultural." A market area may encompass one or more neighborhoods or districts. Market areas are defined by a combination of factors - e.g., physical features, the demographic and socioeconomic characteristics of the residents or tenants, the condition of the improvements (age, upkeep, ownership, and vacancy rates), and land use trends. The subject property, market area, and neighborhood are all affected by operation of the four forces that affect property value. These forces include social, economic, governmental, and environmental factors. Beyond an analysis of the region, or city, in which the property is located, it is also important to define the market area and/or neighborhood where it is located. Given specific market area and/or neighborhood boundaries, the social, economic, governmental and environmental influences are considered, and their influence on value can be documented. Analyzing the market area helps to provide a framework, or context,

in which the opinion of property value is developed. The overriding purpose of describing and analyzing a particular market area is to observe and/or quantify data indicating discernible patterns of urban growth, structure, and change that may enhance or detract from property values.

The subject property is located on the south side of East Lindsey Street due west of the Burlington Northern & Santa Fe Railroad in southeast Norman. Lindsey Street is an arterial four-lane street running east-west through south central Norman extending from west of Interstate 35 to The University of Oklahoma and then east through The University of Oklahoma main campus is situated about one-half mile due west of the subject. Land owned and utilized by the University of Oklahoma extends from Boyd Street on the north to State Highway 9 on the south mostly between Elm and Chautauqua Avenues on the west and Jenkins Avenue on the east. The land directly to the north, west, and south of the subject is owned by the University of Oklahoma. To the north is a park. The land to the west and south was the former site of an old apartment complex owned by the University of Oklahoma which was razed many years ago. are apartments (Flats at Norman) further south and multiple apartment complexes and duplexes to the east along and within a few blocks of Lindsey Street. The predominate land uses the in subject neighborhood consist of multi-family residential properties, singlefamily residences, and commercial uses (retail, restaurants, service businesses, etc.).

There are commercial uses along Lindsey Street at Classen Boulevard and from 12th Avenue S.E. to the east and along Classen Boulevard to the north and south of Lindsey Street. Uses within the immediate vicinity of Lindsey Street and Classen Boulevard include a multitenant retail strip center at the northeast corner, a U-Haul rental center and self-storage facility at the southwest corner, a car wash and condominium complex further south, a retail building at the southeast corner, a convenience store, fast-food restaurant (Braum's Ice Cream), and an apartment complex further east, and a multifamily residential property at the northwest corner. The surrounding neighborhoods of single-family residential consist mostly subdivisions and neighborhoods.

The downtown central business district of Norman is situated about one mile northwest of the subject. Interstate 35, the major interstate highway running north-south through central Oklahoma, is accessible off of West Lindsey Street about two miles west of the subject.

SITE ANALYSIS:

The subject site consists of a ±5.2-acre tract of land located on the south side of East Lindsey Street due west of the Burlington Northern & Santa Fe Railroad in Norman. Lindsey Street is an arterial four-lane asphalt surfaced street with concrete curb and gutter. The site is irregular in shape as shown on the plot plan found on the following pages. The site has only limited frontage along Lindsey Street to the west of the water tower (see plot plan.)

The site has a general gradual slope from the northeast corner to the southwest corner and from east to west. The site appears to have adequate drainage. A very small part of the site (at the southwest corner) appears to be located within any HUD-identified Special Flood Hazard Area (area subject to 100-year flooding, Zone AE, or floodway) according to FEMA Flood Insurance Rate Map Number 40027C0285H effective September 26, 2008. Any part of the site which may be within the 100-year flood plain can be determined by a professional survey of the property. The remainder of the site is situated in Zone X, an area determined to be outside of the 0.2% annual chance flood plain.

City water and sanitary sewer are available and to the site.

Electricity, natural gas, telephone, and cable are provided by public utility companies. No apparent adverse easements, encroachments,

environmental conditions, or other site factors were noted. No survey of the property was available to the appraiser.

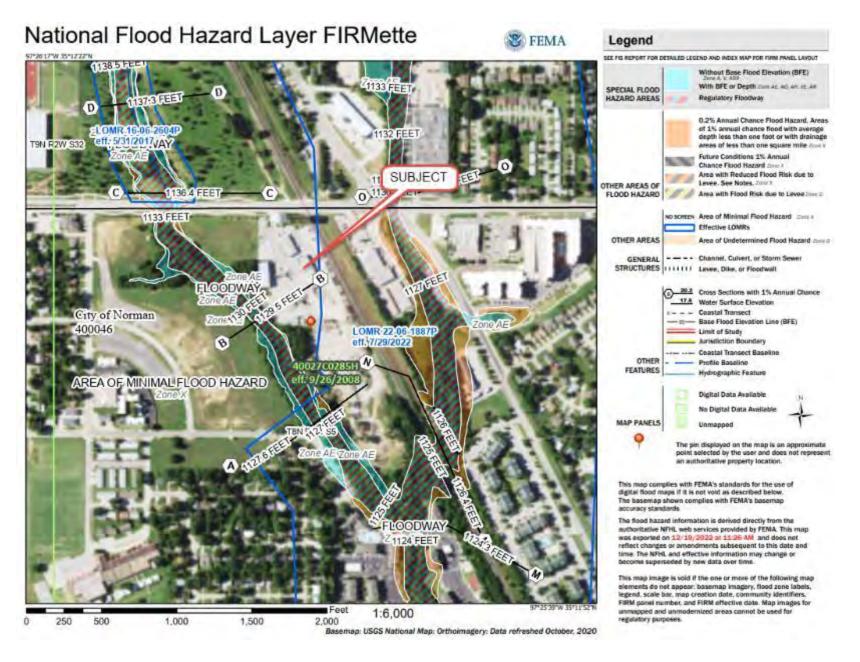
NOTE:

The subject site has been appraised as if vacant and unimproved. The subject site is the current site of the City of Norman Street Maintenance Facility. There are several existing buildings, asphalt paving, and fencing on the property which have been given no consideration or value in this appraisal.



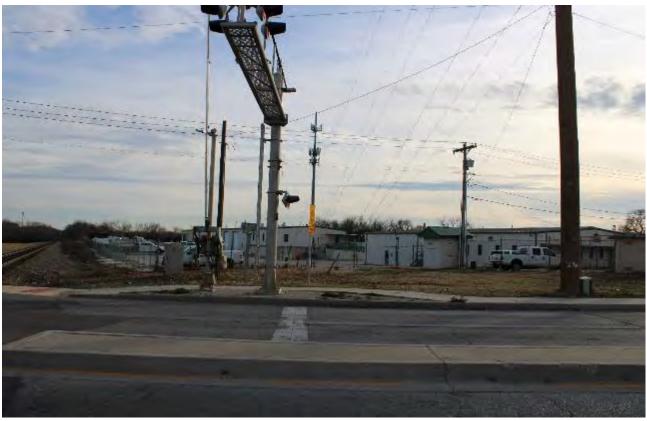
EXISTING SITE
Lindesy Yard
SEPTEMBER 27, 2021











SUBJECT SITE (VIEW LOOKING SOUTH FROM LINDSEY STREET AQLONG RAILROAD)



SUBJECT SITE (VIEW LOOKING SOUTH-S.W. FROM LINDSEY STREET ALONG RAILROAD)







SUBJECT SITE (VIEW LOOKING NORTHWEST FROM RAILROAD TRACKS NEAR S.E. CORNER OF SITE)

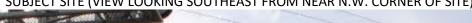


SUBJECT SITE (VIEW LOOKING NORTH FROM SOUTH OF SITE)



SUBJECT SITE (VIEW LOOKING SOUTHEAST FROM LINDSEY STREET)







LINDSEY STREET LOOKING WEST FROM RAILROAD TRACKS (SUBJECT TO LEFT IN FOREGROUND)



LINDSEY STREET LOOKING WEST FROM IN FRONT OF SUBJECT SITE



LINDSEY STREET LOOKING EAST FROM IN FRONT OF SUBJECT SITE



VIEW LOOKING SOUTH FROM LINDSEY STREET ALONG RAILROAD TRACKS (SUBJECT TO RIGHT)



VIEW LOOKING NORTH ALONG RAILROAD TRACKS FROM SOUTHEAST OF SUBJECT (SUBJECT TO LEFT)

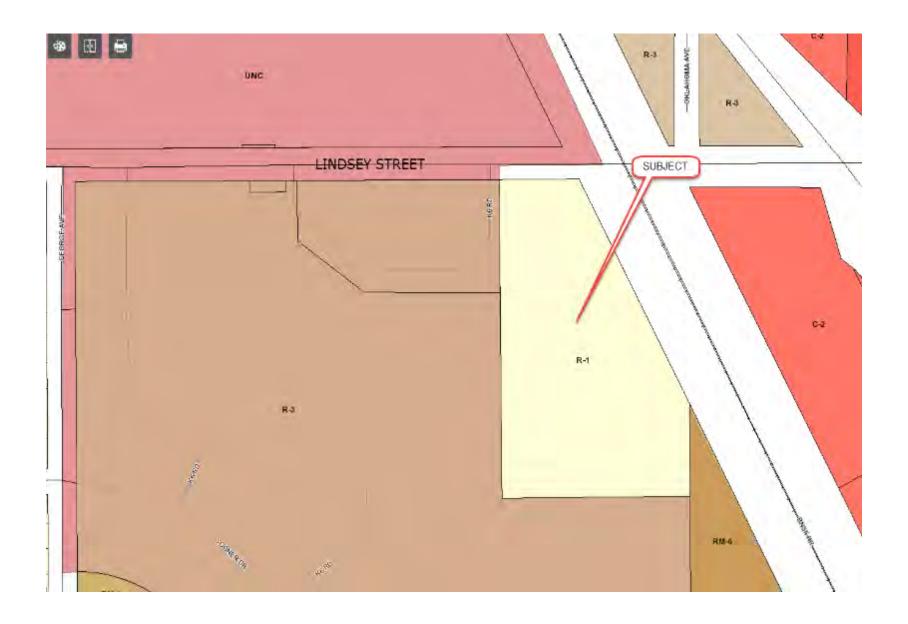
ZONING:

The subject property is currently zoned "R-1" Single-family Dwelling District by the City of Norman. The "R-1" District permits single-family dwellings, family day care homes, and general purpose or farms. Uses permissible upon review include municipal uses, public buildings, public utilities, churches, and schools. The present use of the subject property is municipal use (City of Norman Street Maintenance Facility) which is a legally permissible use under the "R-1" zoning district. The property can be rezoned for another use which will require platting of the property. With the surrounding land uses and zoning being multi-family residential (R-3 or RM-6) and commercial (C-2), the most likely use for which the property could be rezoned would be multi-family residential, commercial, or mixed use.

The Norman 2025 Land Use and Transportation Plan designates the future use of the subject site as institutional. The institutional classification is due to the property being the site of the City of Norman Street Maintenance Facility. The future use of the surrounding land to the west, southwest, and south of the subject is designated as high density residential.

On the following pages can be found the City of Norman zoning map and Norman 2025 Land Use and Transportation Plan for the subject

property. The current zoning for the land contiguous to the south, southwest, and south of the subject property is shown as either "R-3" Multi-family Dwelling District or "RM-6" Medium Density Apartment District on the City of Norman zoning map. However, these contiguous properties are owned by the University of Oklahoma and are actually designated as unclassified (UNC). If these properties were to be sold and developed by a party or parties other than the University of Oklahoma, then the underlying zoning by the City of Norman would apply to the land.



Legend

Zoning A-1: General Agricultural A-2: Rural Agricultural C-1: Local Commercial C-2: General Commercial C-3: Intensive Commercial C-O: Suburban Office Commercial CCFB: Center City Form Based Code CO: Suburban Office Commercial CCPUD: Center City Planned Unit Development CR: Rural Commercial I-1: Light Industrial I-2: Heavy Industrial M-1: Restricted Industrial O-1: Office Institutional PL: Park Land PUD: Planned Unit Development R-1: Single Family Dwelling R-1A: Single Family Attached Dwelling R-2: Two-Family Dwelling R-3: Multi-Family Dwelling R-E: Residential Estates RE: Residential Estates RM-2: Low Density Apartment RM-4: Mobile Home Park RM-6: Medium Density Apartment RO: Residence-Office ROW: Right of Way SPUD: Simple Planned Unit Development TC: Tourist Commercial

Unclassified



Norman 2025 Very Low Density Residential Low Density Residential Medium Residential High Density Residential Office Commercial Industrial Institutional County Residential Open Flood Plain park Lakepool / Floodway Mixed Use

HIGHEST AND BEST USE:

Fundamental to the appraisal concept is the theory of highest and most profitable use of the land. The valuation of land is manifest in the use which produces the highest net return to the land. The valuation of the subject site is, therefore, dependent upon the use.

Highest and best use may be defined as:

"The reasonably probable and legal use of vacant land or an improved property that is physically possible, appropriately supported, and financially feasible, and that results in the highest value." (The Dictionary of Real Estate Appraisal, Fourth Edition, Page 135, Appraisal Institute, 2002)

In addition to being reasonably probable, the highest and best use of both the land as though vacant and the property as improved must met four implicit criteria. That is, the highest and best use must be:

- 1. Physically possible
- 2. Legally permissible
- 3. Financially feasible
- 4. Maximally productive

These criteria are often considered sequentially. The tests of physical possibility and legal permissibility must be applied before

the remaining tests of financial feasibility and maximum productivity.

The highest and best use of the land as if vacant and available for use may be different from the highest and best use of the improved property. This occurs when the improvement is not an appropriate use, but still makes a contribution to the total property value in excess of the value of the land.

The following tests must be met when estimating highest and best use. The use must be legal and permissible, not speculative or conjectural. A demand for the use must exist and it must yield the highest net return to the land for the longest period. These tests are applied to the improved property and the land as if vacant.

Highest and Best Use as a vacant site:

Physically Possible Use:

The first constraint of the possible use of the property is dictated by the physical characteristics of the site. The size and location of the parcel are the most important determinants of value. In general, the larger the site the greater its potential to achieve economies of scale and flexibility in development.

The size of the parcel and the provisions of the zoning have considerable influence on the site's ultimate development. The key determinant in the development of the appraised site is the permitted size of the project. The subject site is irregular in shape with an area of ±5.2 acres. The site has frontage and accessibility on Lindsey Street. By virtue of its size and shape, the appraised site lends itself to a variety of possible uses. The physical aspects of the site do not impose extraordinary constraints on its development.

Legally Permissible Use:

The only legal restrictions that apply to the sites are private restrictions and the restrictions of public zoning. No private restrictions were found. Easements existing as of the valuation date were not considered detrimental to the use of the property.

The subject property is currently zoned "R-1" Single-family Dwelling District by the City of Norman. The "R-1" District permits single-family dwellings, family day care homes, and general purpose or farms. Uses permissible upon review include municipal uses, public buildings, public utilities, churches, and schools. The present use of the subject property is municipal use (City of Norman Street Maintenance Facility) which is a legally permissible use under the "R-1" zoning district. The property can be rezoned for another use

which will require platting of the property. With the surrounding land uses and zoning being multi-family residential (R-3 or RM-6) and commercial (C-2), the most likely use for which the property could be rezoned would be multi-family residential, commercial, or mixed use.

The Norman 2025 Land Use and Transportation Plan designates the future use of the subject site as institutional. The institutional classification is due to the property being the site of the City of Norman Street Maintenance Facility. The future use of the surrounding land to the west, southwest, and south of the subject is designated as high density residential.

Financially Feasible Use:

The subject property is located along the south side of East Lindsey Street due west of the Burlington Northern & Santa Fe Railroad. The predominate land uses in the area consist of mostly multi-family residential uses, single-family residential uses, and commercial uses. There has been extensive new multi-family residential development taking place in recent years in the areas surrounding or in close proximity to the University of Oklahoma as demand for rental units in these areas is strong. There has been extensive new commercial development taking place in the Norman area as well.

Rental rates and vacancy rates for multi-family residential properties and commercial/retail properties are at levels which make new construction economically feasible based upon current construction costs. Based upon current market conditions in the area, multi-family residential uses and commercial uses are considered to be economically feasible at the present time.

Maximally Productive Use:

Of the uses which are physically possible, legally permissible, and financially feasible, the maximally productive use or use which will result in the highest net return to the land is considered to be multi-family residential uses, commercial uses, or mixed use.

Highest and Best Use "As Vacant Site":

Based upon current market conditions in the area and the location of the property, the highest and best use of the sites "as vacant and available for use today" is multi-family residential use, commercial use, or mixed use.

THE APPRAISAL PROCESS:

In the appraisal of real property, to arrive at an estimate of market value for the subject site being considered, it is the appraisal practice to search, study and assemble as much information as possible pertaining to value that can be collected from the marketplace, and to utilize this information in three separate approaches to an estimate of value. These three approaches are: the Cost Approach, Income Capitalization Approach, and the Sales Comparison Approach.

Cost Approach - A method in which the value of a property is derived by estimating the replacement cost of the improvements, deducting therefrom the estimated depreciation, and then adding the value of the land as estimated by use of the Sales Comparison Approach.

Income Capitalization Approach - An appraisal technique in which the anticipated net income is processed to indicate the capital amount of investment, which produces the net income. The capital amount called the CAPITALIZED VALUE is, in effect, the sum of the anticipated annual rents less the loss in interest until the time of collection. The reliability of this technique is dependent upon four conditions, namely, (a) the reasonableness of the estimate of the anticipated net annual income; (b) the duration of the net annual income, usually the economic life of the building; (c) the capitalization (discount rate); and (d) the method of conversion (income to capital).

Sales Comparison Approach - An appraisal technique in which the market value estimated is predicated upon prices paid in actual market transactions and current listings, the former fixing the lower limit of value in a static or advancing market (price wise), and fixing the higher limit of value in a declining market; and the latter fixing the higher limit in any market. It is a process of correlation and analysis of similar, recently sold properties. The reliability of this technique is dependent upon: (a) degree of comparability of each property with the property under appraisal; (b) the time of the sale; (c) the verification of sales data; and (d) the absence of unusual conditions affixing the sale.

After arriving at an indication of value by the three approaches, these are correlated into a single conclusion of value based on the approach that has the highest quality and quantity of data available, and the one in which the market participant typically has the greatest confidence.

The subject property consists of ±5.2-acre tract of land for which the highest and best use is considered to be multi-family residential, commercial, or mixed use. The subject site is being appraised as if vacant and unimproved with no consideration or value given to any existing improvements on site. The Cost Approach is not applicable as the subject site is being appraised as if vacant and unimproved

and no improvements are involved. The Income Capitalization Approach is not applicable as the property is not an income-producing property. The only applicable approach to value in the valuation of the subject site as if vacant and unimproved is the Sales Comparison Approach.

SALES COMPARISON APPROACH

The Sales Comparison Approach is a method of estimating market value in which a subject property is compared with comparable properties that have been sold recently. Preferably, all properties are in the same geographic area. One premise of the Sales Comparison Approach is that the market will establish a price for the subject property in the same manner that the prices of comparable competitive properties are established.

The sale prices of the properties deemed most comparable to the subject property tend to set the range in which the value of the subject property will fall. Further consideration of the comparative data allows the appraiser to derive a figure representing the value of the appraised property, in keeping with the definition of value sought, as of the effective date of the appraisal.

Essentially, the Sales Comparison Approach is a systematic procedure for comparison. In applying the Sales Comparison Approach, an appraiser:

- 1. Researches the market to obtain information about transactions, listings, and other offerings of properties similar to the subject property.
- 2. Verifies the information through a knowledgeable source, preferably one of the participants in the transaction, by considering whether the data obtained is factually accurate and the transactions reflect arm's length market considerations.
- 3. Determines relevant units of comparison for example, acre, square foot, multiplier, etc. and develops a comparative analysis for each unit.
- 4. Compares the subject property and comparable sales and adjusts the sale price of each comparable appropriately or eliminates the property as a comparable.
- 5. Reconciles the several value indications derived from the comparables into a single value indication.

Estimating the degree of comparability between two properties necessitates a judgment about their similarity. This judgment is based on consideration of elements of comparison - i.e., the characteristics of properties and transactions that cause prices to The elements of comparison are: (1) real property rights conveyed; financing terms; (3) conditions of (2) sale; expenditures made immediately after purchase; (5) market conditions; (7)physical characteristics(size, location; construction quality, condition, etc.); (8) economic characteristics(operating expenses, lease provisions, management, tenant mix, etc.); (9) use(zoning); and (10) non-realty components of value. Adjustments for these elements are made to the price of each comparable property as appropriate.

The subject property consists of a ± 5.2 -acre tract of land for which the highest and best use is considered to be multi-family residential, commercial, or mixed use. The subject site is being appraised as if vacant and unimproved with no consideration or value given to any existing improvements on site.

Four recent sales of comparable unimproved tracts of land with similar highest and best use (multi-family residential or commercial) were analyzed in the valuation of the subject property by the Sales Comparison Approach, summaries of which can be found on the following pages. Recent sales of comparable properties were found to be somewhat limited due to the scarcity of unimproved tracts of land in the subject area with similar highest and best use.

COMPARABLE LAND SALE NO. 1:

Location: Northeast corner of 12th Avenue S.E.

& Cobblestone Creek Drive

Norman, Oklahoma

Legal Desc.: Part of SW/4 Section 16, T8N, R2W, I.M., Cleveland

County, Oklahoma (to be platted as Sage Cobblestone

Creek)

Buyer: Juniper Norman OZ Senior Housing, LP

Seller: CCDG, LLC

Site Area: $\pm 287,625$ S.F. or ± 6.60 acres (net area)

Zoning: "PUD-1920-22" Planned Unit Development District

(multi-family residential use - active adult

independent living center)

Date of Sale: December 4, 2019

Book/Page: 5998/398

Sale Price: \$1,500,000 (all cash to seller)

Price/S.F.: \$5.22

Comments: This was the December 2019 sale of a ±6.60-acre

unimproved tract of multi-family residential land located at the northeast corner of 12th Avenue S.E. and Cobblestone Creek Drive in southeast Norman. A new boutique resort-style active adult living center known as Sage Cobblestone has since been constructed on this tract. This is a level corner site with all city utilities to the site. This tract

is contiguous to the Cobblestone Golf Course.



COMPARABLE LAND SALE NO. 1 $(\pm 6.60-\text{ACRE}\ \text{TRACT}\ \text{OF}\ \text{MULTI-FAMILY}\ \text{RESIDENTIAL}\ \text{LAND})$

COMPARABLE LAND SALE NO. 2:

Location: Southeast corner of 12th Avenue S.E. & Commerce Dr.

Norman, Oklahoma

Legal Desc.: Lot 1, Block 2, of East Lindsey Plaza Section 5, to

Norman, Cleveland County, OK

Buyer: Tinker Federal Credit Union

Seller: Arvest Bank

Date of Sale: October 24, 2019

Book/Page: 5984/1240

Size: ±129,948 S.F. or 2.9832 acres

Zoning: "RM-2" Low Density Apartment District

(Rezoned to "SPUD-1920-11" Simplified Planned Unit

Development by the buyer)

Sale Price: \$910,000 (all cash to seller)

Price/S.F.: \$7.00

Comments: This was the October 2019 sale of an unimproved

12th Avenue S.E. and Commerce Drive in southeast Norman. This is an irregular shaped corner site which was platted with all city utilities to the site. This site has since been improved with a new Tinker Federal

2.9832-acre site located at the southeast corner of

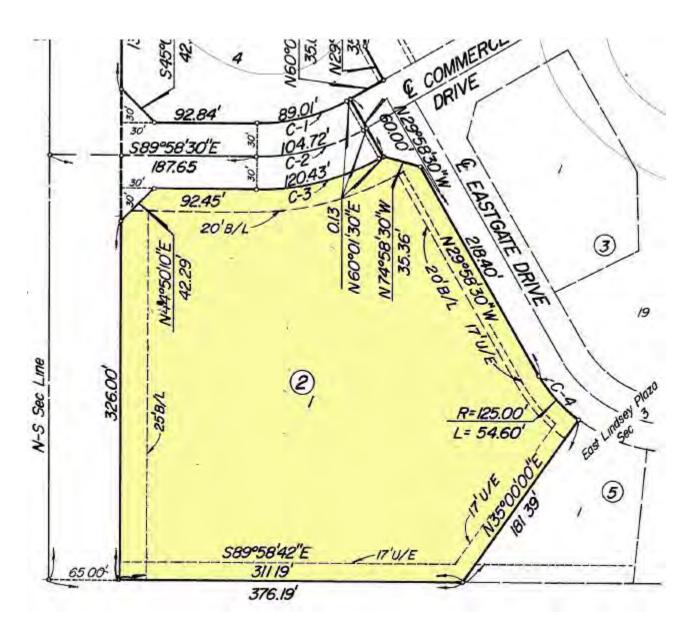
Credit Union. At the time of sale, this tract was zoned for multi-family residential use ("RM-2" Low Density Apartment District). The property was rezoned

by the buyer for commercial use as a SPUD for

development with a new credit union which has since been constructed on the site. This corner tract has frontage on $12^{\rm th}$ Avenue S.E. (a major arterial fourlane street), Commerce Drive, and Eastgate Drive.



COMPARABLE LAND SALE NO. 2



COMPARABLE LAND SALE NO. 2

COMPARABLE LAND SALE NO. 3:

Location: 2109 West Lindsey Street

Norman, Oklahoma

Legal Desc.: Lot 1, Block 1, Dowell Addition, to Norman,

Cleveland County, OK

Buyer: Nacionales, LLC

Seller: Richard Samuel Dowell III Revocable Living Trust

Date of Sale: May 3, 2021

Book/Page: 6234/157

Size: ±142,877 S.F. or 3.28 acres

Zoning: "C-2" General Commercial District and "C-1" Local

Commercial District

Sale Price: \$932,500 (all cash to seller)

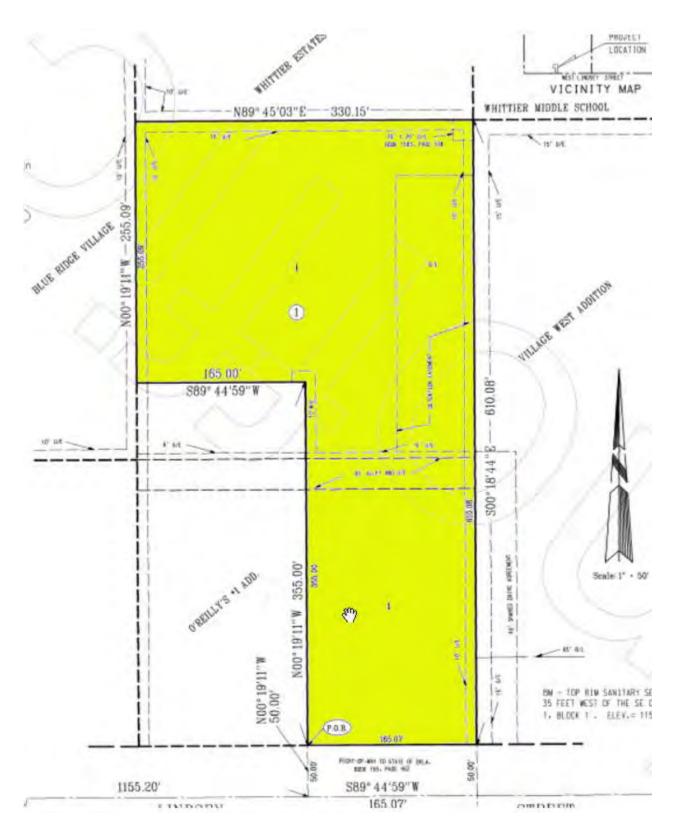
Price/S.F.: \$6.53

Comments: This was the recent (May 2021) sale of an unimproved

3.28-acre commercial tract of land located on the north side of the 2100 block of West Lindsey Street in southwest Norman. This is an irregular shaped interior tract with 165.07 feet of frontage on West Lindsey Street. This tract is level and has all city utilities to the site. A new commercial building has since been constructed on the front of this site.



COMPARABLE LAND SALE NO. 3



COMPARABLE LAND SALE NO. 3

COMPARABLE LAND SALE NO. 4:

Location: 2960 Classen Boulevard

Norman, Oklahoma

Legal Desc.: Part of NW/4 Section 9, T8N, R2W, I.M., Cleveland

County, OK

Buyer: Oncue RE, LLC

Seller: Estate of George M. Tullius

Date of Sale: June 26, 2018

Book/Page: 5817/605

Size: ±322,344 S.F. or 7.40 acres

Zoning: "C-2" General Commercial District

Sale Price: \$1,482,782 (all cash to seller)

Price/S.F.: \$4.60

Comments: This was the June 2018 sale of an unimproved 7.40-

acre commercial tract of land located on the west side of the 2900 block of Classen Boulevard due north of State Highway 9 in southeast Norman. This tract was not platted at the time of sale and was covered in trees. This irregular shaped tract backs up to the railroad and had all city utilities nearby at the time of sale. This tract required extensive site work (grading, clearing, and creation of two detention ponds encompassing ±2.05 acres of the site -shown on the final plat as Detention Ponds A & B) for

development of the tract. The two detention ponds significantly reduce the usable area of the tract. A

new OnCue convenience store has since been

constructed on the south half of the site and a pad site created on the north half. The price per square foot based upon the developable area of the tract of

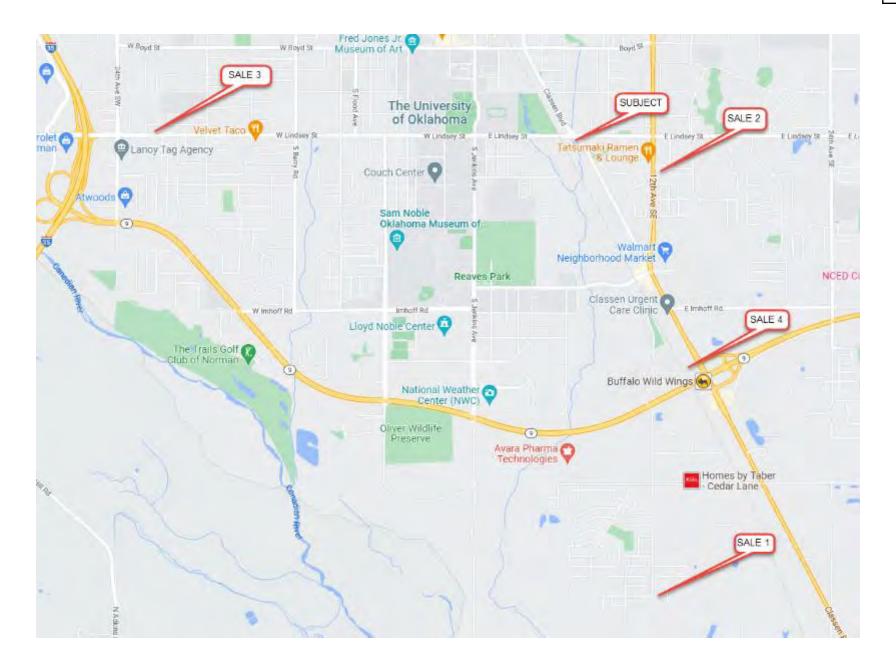
5.35 acres would be \$6.36/S.F.

Unit of Comparison:

Price/S.F.: \$4.60 (based on gross area of site)
Price/S.F.: \$6.36 (based on developable area)







Analysis of Land Sales:

Four sales of comparable unimproved tracts of land with similar highest and best use (multi-family residential or commercial) have been analyzed in the valuation of the subject site, a summary of which is as follows:

SUMMARY OF COMPARABLE LAND SALES

		SALE	SALE	SIZE		PRICE
SALE	LOCATION	DATE	PRICE	(AC)	ZONING	PER S.F.
1	NE corner 12 th Avenue S.E. & Cobblestone Creek Drive Norman, OK	(*Multi	\$1,500,000 -family resid independent	ential use	e - active	•
2	, ,	ed for m	' '	esidentia for commen	l use at	\$7.00
3	2109 West Lindsey Street Norman, OK	5-21	\$932,500	3.280	C-2	\$6.53
4	2960 Classen Blvd. West side Classen Blvd. Due north of State Hwy. 9 Norman, OK		\$1,482,782 l on net usabl			\$4.60 \$6.36*

The appraiser has made a qualitative comparative analysis of the comparable land sales which involved the comparison of each sale to the subject property with an analysis of any property differences having a significant effect upon market value. The principal areas of dissimilarities include buyer and seller motivation (conditions of sale), market conditions (time of sale), location, size, shape, frontage, accessibility, visibility, availability of city utilities, easements, zoning, highest and best use, and topography.

The four sales indicated unadjusted prices per square foot ranging from a low of \$4.60 to a high of \$7.00 with an unadjusted mean or average of \$5.84/S.F. The unadjusted mean or average price per square foot for the four sales using the \$6.28/S.F. based upon the net usable area of Sale 4 is \$6.28/S.F. Two sales of unimproved tracts of land zoned for multi-family residential use and two sales of unimproved tracts of land zoned for commercial use were analyzed in this approach.

Sale 1, which indicated an unadjusted price per square foot of \$5.22, was the December 2019 sale of an unimproved 6.60-acre tract of multifamily residential land located on 12th Avenue S.E. at Cobblestone Drive in southeast Norman. Sale 1 has since been improved with an active adult independent living center. Sale 1 sold three years ago and would require a positive adjustment for increase in value since the date of sale as land values have been gradually increasing in the area in recent years. The subject site is located in close proximity to the University of Oklahoma and is considered to be superior in location to Sale 1. Adjusted for date of sale, and inferior location, Sale 1 would support a value for the subject site higher than \$5.22/S.F.

Sale 2, which indicated an unadjusted price per square foot of \$7.00, was the October 2019 sale of an unimproved 2.9832-acre tract of land

zoned for multi-family residential use located on 12th Avenue S.E. at Commerce Drive in southeast Norman. Sale 2 was rezoned to commercial use by the buyer and has since been improved with a credit union. Sale 2 sold three years ago and would require a positive adjustment for increase in value since the date of sale as land values have been gradually increasing in the area in recent years. Sale 2 is a corner site fronting on a major arterial four-lane street (12th Avenue S.E.) and is superior in location to the subject. Sale 1 is a smaller tract which would tend to sell for a slightly higher price per square foot than would a larger tract such as the subject. Adjusted for date of sale, corner influence, superior location, and slightly smaller size, Sale 2 would support a value for the subject site less than \$7.00/S.F.

Sale 3, which indicated an unadjusted price per square foot of \$6.53, was the recent (May 2021) sale of an unimproved 3.28-acre tract of land zoned for commercial use located on the north side of the 2100 block of West Lindsey Street in southwest Norman. Sale 3 has since been improved with a commercial building. Sale 3 sold about 1.5 years ago and would require some positive adjustment for increase in value since the date of sale as land values have been gradually increasing in the area in recent years. The subject site is located in close proximity to the University of Oklahoma and is considered to be relatively similar in location to Sale 3 which is located on

West Lindsey Street within an area of commercial and multi-family uses. Sale 3 is a slightly smaller tract which would tend to sell for a slightly higher price per square foot than would a larger tract such as the subject. Adjusted for date of sale and slightly smaller size, Sale 3 would support a value for the subject site similar to \$6.53/S.F.

Sale 4, which indicated an unadjusted price per square foot of \$4.60/S.F. based upon the gross area of the site and \$6.36/S.F. based on the net usable area of the tract excluding two detention areas, was the June 2018 sale of an unimproved 7.40-acre tract of land zoned for commercial use located on the west side of Classen Boulevard due north of State Highway 9 in southeast Norman. Sale 4 has since been improved with an OnCue convenience store and a pad site. sold about four years ago and would require some positive adjustment for increase in value since the date of sale as land values have been gradually increasing in the area in recent years. The subject site is located in close proximity to the University of Oklahoma and is considered to be relatively similar in location to Sale 4 which is located on Classen Boulevard at State Highway 9. Sale 4 required extensive site work (grading, clearing, and construction detention areas) in developing the site. Adjusted for date of sale and the extent of site work required, Sale 4 would support a value for the subject site higher than \$4.60/S.F. and similar to \$6.36/S.F.

There was another commercial land sale in close proximity to the subject which was not included in the foregoing analysis due to the less recent date of sale. This sale occurred over eight years ago in October of 2014 and is not considered to be as reliable as the other four more recent sales used in the report. A commercial tract with a gross area of 2.8548 acres and a net usable area of 2.4265 acres (excluding land within the floodway) at 1915-1935 Classen Boulevard (northeast corner of Lindsey Street and Classen Boulevard sold for \$8.44/S.F. based upon the gross area and \$9.93/S.F. based upon the net usable site area. This tract is situated only one block northeast of the subject site and abuts a creek as does the subject This sale has 426.29 feet of frontage on a major arterial four-lane street (Classen Boulevard) and 240.0 feet of frontage on Oklahoma Avenue and is considered to be superior in frontage and location to the subject. This sale was smaller than the subject and would tend to sell for a higher price per square foot as a result. After all necessary adjustments for various property differences, this sale would support a value for the subject site less than \$8.44/S.F. This sale provides strong additional support to the value indication for the subject set forth in this analysis.

The subject site is an irregular shaped interior tract of land with limited frontage on Lindsey Street for which the highest and best use is considered to be either multifamily residential, commercial

use, or mixed use. The subject site is located in close proximity to the University of Oklahoma main campus. The site has a gradual slope from the northeast corner to the southwest corner and east to west and would require some grading and site work for development of the tract. The site would require rezoning and platting for development of the site. If the subject site were offered for sale in the open market, demand for the site would be strong due to the very limited availability of similar tracts of land zoned for multifamily residential use or commercial use in close proximity to the University of Oklahoma.

Conclusion:

Based upon the forgoing analysis of the most recent sales of comparable unimproved tracts of land in the subject area with similar highest and best use (multi-family residential or commercial), considering the very limited number of sites available for sale suitable for multi-family residential use or commercial use in the subject area, a value of \$6.25/S.F. (in line with the unadjusted prices per square foot indicated by the comparable land sales) is considered to be a reasonable and supportable estimate of value for the subject site as if vacant and unimproved.

Valuation:

 $5.2 \text{ acres} \times 43,560/\text{S.f.}$ @ \$6.25/S.F. = \$1,415,700

Indicated Value of Subject Site
As If Vacant and Unimproved
By Sales Comparison Approach

Rounded to \$1,415,000

ESTIMATED MARKETING TIME:

Marketing time is defined as follows: "The time it takes an interest in real estate to sell on the market subsequent to the date of an appraisal. Reasonable marketing time is an estimate of the amount of time it might take to sell an interest in real property at its estimated market value during the period immediately after the effective date of the appraisal; the anticipated time required to expose the property to a pool of prospective purchasers and to allow appropriate time for negotiation, the exercise of due diligence, and the consummation of a sale at a price supportable by concurrent market conditions." (The Dictionary of Real Estate Appraisal, Fourth Edition, 2002, Appraisal Institute)

For this analysis, one assumes a normal marketing time with an aggressive and professional marketing program. Based on the marketing time for comparable unimproved tracts of land with similar highest and best use (multi-family residential or commercial) in the Norman area along with discussions with commercial brokers in the area, it is the appraiser's opinion that a sale of the appraised property could be achieved within approximately six months or less. This six month marketing period assumes the property would be professionally and aggressively marketed at the final estimate of value indicated in this report assuming continued similar market conditions.

RECONCILIATION AND FINAL VALUE CONCLUSION:

Reconciliation is the function in the valuation process in which an appraiser analyzes alternative conclusions and selects a final value estimate from among two or more indications of value. A thorough review of the entire valuation process may precede reconciliation. Reconciliation is the part of the valuation process in which an appraiser most directly draws upon his experience, expertise, and professional judgment to resolve differences among the value indications derived from the application of approaches. The appraiser weighs the relative significance, applicability, and defensibility of each value indication and relies most heavily on the one most appropriate to the purpose of the appraisal. The conclusion drawn is based on the appropriateness, the accuracy, and the quantity of the evidence in the entire appraisal.

Following is a summary of the value indications by the applicable approaches to value:

COST APPROACH NOT APPLICABLE

INCOME CAPITALIZATION APPROACH NOT APPLICABLE

SALES COMPARISON APPROACH \$1,415,000

The Sales Comparison Approach has been utilized to estimate the value of the subject site as if vacant and unimproved and is considered to be the only applicable approach to value. The Cost Approach was not

applicable as there are no improvements being valued. The Income Capitalization Approach was not applicable in the valuation of the subject property either as the property is not an income-producing property.

The Sales Comparison Approach was based on four fairly recent sales of comparable unimproved tracts of land with similar highest and best use (multi-family residential or commercial) in the subject area. These sales are considered to be the most comparable sales of unimproved tracts of land with similar highest and best use which have sold in recent years in the Norman area. Based upon the quantity and quality of available comparable sales data, the value indication by the Sales Comparison Approach is considered to be reliable.

Based upon this appraisal, it is the appraiser's opinion that the market value of the subject property as if vacant and unimproved as of December 19, 2022 is:

MARKET VALUE OF SUBJECT PROPERTY AS IF VACANT & UNIMPROVED

ONE MILLION FOUR HUNDRED FIFTEEN THOUSAND DOLLARS (\$1,415,000.00)

APPRAISER'S CERTIFICATION

The undersigned does hereby certify that, except as otherwise noted in this appraisal report:

I have no present or contemplated future interest in the real estate that is the subject of this appraisal report.

I have no personal interest or bias with respect to the subject matter of this appraisal report or to the parties involved with this assignment.

To the best of my knowledge and belief, the statements of fact contained in this appraisal report, upon which analyses, opinions, and conclusions expressed herein are based, are true and correct.

This appraisal report sets forth all of the limiting conditions (imposed by the terms of my assignment or by the undersigned) affecting the analyses, opinions, and conclusions contained in this report.

This appraisal report has been made in conformity with, and is subject to, the requirements of the Uniform Standards of Professional Appraisal Practice promulgated by the Appraisal Standards Board of the Appraisal Foundation.

No one, other than the undersigned, prepared the analyses, conclusions, and opinions concerning the real estate that are set forth in this appraisal report.

The appraiser certifies that the compensation for this appraisal is not contingent upon the reporting of a predetermined value or directed value that favors the cause of the client, the amount of the value estimate, the attainment of a stipulated result or the occurrence of a subsequent event.

I have made a personal inspection of the property that is the subject of this report.

This appraisal assignment was not based on a requested minimum valuation, a specific valuation, or the approval of a loan.

I am certified by the State of Oklahoma as a Certified General Real Estate Appraiser, Certified General Appraiser No. 10289CGA, through December 31, 2024.

I certify that I have not previously provided any services relative to the subject property within the past three years and that the client was advised of the same prior to engagement.

Date: December 23, 2022

Jim R. Artman

Jen R. artma

Certified General Appraiser No. 10289CGA

QUALIFICATIONS OF APPRAISER

James (Jim) R. Artman ARTMAN APPRAISAL COMPANY 4612 Foxborough Court Norman, Oklahoma 73072

EXPERIENCE:

Oct., 1978 -

Present General real estate appraisal practice as owner of Artman Appraisal Company

in Norman, Oklahoma. Primary area of assignments is Norman, Cleveland

County, Moore, McClain County, and Oklahoma City metropolitan area.

March, 1978 -

Sept., 1978 Vice President, Savings Investment Service Corporation.

April, 1977 -

Feb., 1978 Associate Appraiser, Oklahoma Appraisal Company, Inc.

Jan., 1977 - Regional Appraisal Manager, Sooner Federal Savings and Loan

March, 1977 Association.

June, 1973 -

Dec., 1976 Staff Appraiser, Sooner Federal Savings and Loan Association.

GENERAL EDUCATION:

Bachelor of Sciences (Mathematics major, Economics minor). Conferred by University of Oklahoma, May,1972.

Successful completion of 21 credit hours toward M.B.A. degree, University of Oklahoma.

REAL ESTATE APPRAISAL EDUCATION:

Successful completion of Course I-A and examination, American Institute of Real Estate Appraisers, May, 1974. (79 hours credit)

Successful completion of Course I-B and examination, American Institute of Real Estate Appraisers, May, 1975. (76 hours credit)

Successful completion of Course II and examination, American Institute of Real Estate Appraisers, March, 1976. (79 hours credit)

Successful completion of Narrative Residential Case Study Examination and Narrative Report Writing Seminar, Course #102 "Applied Residential Property Valuation," Society of Real Estate Appraisers, December, 1976. (39 hours credit)

QUALIFICATIONS OF APPRAISER (Jim R. Artman) Page 2

REAL ESTATE APPRAISAL EDUCATION: (Cont'd.)

Successful completion of Course VI and examination, American Institute of Real Estate Appraisers, February, 1977. (39 hours credit)

Successful completion of Standards of Professional Practice (Part A) and examination, The Appraisal Institute, July, 1991 (16 hours credit)

Successful completion of Standards of Professional Practice (Part B) -Course #420 and examination, The Appraisal Institute, August, 1994 (11 hours credit).

Educational seminars and courses in real estate appraisal are continuously attended in compliance with continuing education requirements by the Oklahoma Real Estate Appraisal Board(current requirement is 42 hours every three years). A complete list of appraisal courses recently completed is available to the client upon request.

PROFESSIONAL MEMBERSHIPS & AFFILIATIONS:

Former Board Member, Oklahoma Real Estate Appraiser Board (July 2, 2013 through July 1, 2018)

Member, Standards and Disciplinary Procedures Committee Oklahoma Real Estate Appraiser Board

Member, Probable Cause Committee Oklahoma Real Estate Appraiser Board

Member, Real Estate Appraisal Data, Inc.

Appraiser attends regular meetings of Oklahoma Great Plains Chapter of the Appraisal Institute.

STATE CERTIFICATION:

Certified General Appraiser No. 10289CGA State of Oklahoma (Certified through December 31, 2024)

State of Oklahoma



Glen Mulready, Insurance Commissioner

Oklahoma Real Estate Appraiser Board

This is to certify that:

James Artman

has complied with the provisions of the Oklahoma Real Estate Appraisers Act to transact business as a **State Certified General** Real Estate Appraiser in the State of Oklahoma.

In Witness Whereof, I have hereunto set my hand and caused the seal of my office to be affixed at the City of Oklahoma City, State of Oklahoma, this 21st day of December, 2021.



Glen Mulready, Insurance Commissioner Chairperson, Oklahoma Real Estate Appraiser Board

Members, Oklahoma Real Estate Appraiser Board

Brandon Witt

Oklahoma Appraiser Number:

10289CGA

Expirer:

12/31/2024

APPRAISAL REPORT OF

±13.3-ACRE TRACT OF LAND AS IF VACANT & UNIMPROVED EAST SIDE OF GODDARD AVENUE, WEST OF NEWTON DRIVE (NOW CLOSED), ±470 FEET NORTH OF LEXINGTON AVENUE, & DUE SOUTH OF THE CITY OF NORMAN PUBLIC WORKS DEPARTMENT WITHIN THE UNIVERSITY OF OKLAHOMA RESEARCH PARK NORTH NORMAN, OKLAHOMA

EFFECTIVE DATE OF APPRAISAL

DECEMBER 19, 2022

DATE OF REPORT

DECEMBER 23, 2022

PREPARED FOR

MS. SARAH MARGARET HENDRICKSON, NCIDQ, ASID PROGRAM MANAGEMENT ADG/BLATT ARCHITECTS
920 WEST MAIN STREET
OKLAHOMA CITY, OKLAHOMA 73106

PREPARED BY

JIM R. ARTMAN
ARTMAN APPRAISAL COMPANY
4612 FOXBOROUGH COURT
NORMAN, OKLAHOMA 73072
(CERTIFIED GENERAL APPRAISER NO. 10289CGA)

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ARTMAN APPRAISAL COMPANY

4612 FOXBOROUGH COURT NORMAN, OKLAHOMA 73072

Phone: (405) 360-1444 E-Mail: artman11@cox.net

December 23, 2022

Ms. Sarah Margaret Hendrickson, NCIDQ, ASID Program Management ADG/Blatt Architects 920 West Main Street Oklahoma City, Oklahoma 73106

Re: ±13.3-acre tract of land as if vacant & unimproved East side of Goddard Avenue, west of Newton Drive (now closed), ±470 feet north of Lexington Avenue, and due south of the City of Norman Public Works Department within the University of Oklahoma Research Park North Norman, Oklahoma

Owner of Record: University of Oklahoma

Dear Ms. Hendrickson:

Pursuant to your request, I am submitting this appraisal report on a ±13.3-acre tract of land (as if vacant and unimproved) located on the east side of Goddard Avenue, west of Newton Drive (now closed), ±470 feet north of Lexington Avenue, and due south of the City of Norman Public Works Department within the University of Oklahoma Research Park North in Norman, Oklahoma. This property is more particularly described in the following appraisal report.

The directed purpose of this appraisal was to estimate the market value of the fee simple interest in the property, subject to the assumptions and limiting conditions as set forth. The client for this appraisal is ADG/Blatt Architects and the intended users include ADG/Blatt Architects, the City of Norman, and the University The intended use of the appraisal is for use in the of Oklahoma. acquisition of the property by the City of Norman. The appraisal has been prepared in compliance with the Uniform Standards of Professional Appraisal Practice (USPAP) promulgated Appraisal Standards Board of the Appraisal Foundation.

Ms. Sarah Margaret Hendrickson December 23, 2022 Page 2

Based upon this appraisal, it is the appraiser's opinion that the market value of the fee simple interest in the subject property as if vacant and unimproved as of December 19, 2022 is:

MARKET VALUE OF SUBJECT PROPERTY AS IF VACANT & UNIMPROVED

ONE MILLION SEVEN HUNDRED THIRTY-EIGHT THOUSAND DOLLARS (\$1,738,000.00)

The subject site has been appraised as if vacant and unimproved. There is an existing building on the property at 2113 Goddard Avenue occupied by Sooner Flight Academy which has been given no consideration or value in this appraisal.

Thank you for the opportunity to be of service. I trust you will find this report satisfactory.

Respectfully submitted,

Jim R. Artman

Certified General Appraiser No. 10289CGA

ASSUMPTIONS AND LIMITING CONDITIONS

The interest in the surface rights to the subject property has been appraised subject to the following conditions:

1. No responsibility is assumed for matters of legal nature affecting title to the property nor is an opinion of title rendered. The title is assumed to be good and marketable. The value estimate is given without regard to any questions of title, boundaries, encumbrances or encroachments.

It is assumed that there is full compliance with all applicable federal, state and local environmental regulations and laws unless non-compliance is stated, defined and considered in the appraisal report.

It is assumed that all required licenses, consents, or other legislative or administrative authority from any local, state, or national government, or private entity, or organization have been or can be obtained or renewed for any use on which the value estimate contained in this report is based.

2. It is assumed that the utilization of the land and improvements is within the boundaries of the property lines of the property described and that there is no encroachment or trespass unless noted within the report.

No survey of the property has been made by the appraiser and no responsibility is assumed in connection with such matters. Any maps, plats, or drawings reproduced and included in the report are intended only for the purpose of showing spatial relationships. The reliability of the information contained on any such map or drawing is assumed by the appraiser and cannot be guaranteed to be correct.

- 3. It is the opinion of the appraiser that all information in this report has been obtained from reliable sources and is substantially correct, but he assumes no liability in respect thereto.
- 4. All plans, sketches, and other exhibits are included in this report only for assisting the reader in visualizing the property and the data pertaining to the property. Some of the sketches are not drawn to scale.

- 5. Possession of this report does not grant the right to reproduce any or all of the report, unless prior approval has been given.
- 6. This appraisal should not be considered a report on the physical items that are a part of the property. Although the appraisal may contain information about the physical items being appraised (including their adequacy and/or condition), it should be clearly understood that this information is only to be used as a general guide for property valuation and not as a complete or detailed physical report. The appraiser is not a construction, engineering, or legal expert and any opinion given on these matters in this report should be considered preliminary in nature.
- 7. The observed condition of the foundation, roof, exterior walls, floors, heating, ventilation and air conditioning (HVAC) system, plumbing, insulation, electrical service, mechanical systems, and construction is based on a casual inspection only and no detailed inspection was made. For instance, the appraiser is not an expert on heating systems and not attempt was made to inspect the interior of the furnace. The structures were not checked for building code violations and it is assumed that all buildings meet the building codes unless otherwise stated in the report.

Some items such as conditions behind walls, above the ceiling, behind, locked doors or under the ground are not exposed to casual view and, therefore, were not inspected. The existence of insulation (if any is mentioned) was found by conversation with others and/or circumstantial evidence. Since it is not exposed to view, the accuracy of any statements about insulation cannot be guaranteed.

It is assumed that there are no hidden or unapparent conditions of the property, sub-soil, or structures which would render it more or less valuable. No responsibility is assumed for such conditions or the engineering which may be required to discover such factors. Since no engineering or percolation tests were made, no liability is assumed for soil conditions. Sub-surface rights (mineral or oil) were not considered in making this appraisal.

Because no detailed inspection was made, and because such knowledge goes beyond the scope of this appraisal, any observed condition comments given in this report should not be taken as a guarantee that a problem does not exist. Specifically, no guarantee is made as to the adequacy of condition of the foundation, roof, exterior walls, interior walls, floors, heating, ventilation and air conditioning (HVAC) system, plumbing, electrical system, insulation, or any other detailed construction matters. If any interested party is concerned about the existence, condition, or adequacy of any particular item, the appraiser would strongly suggest that a construction expert be hired for a detailed investigation.

8. Information (including projections of income and expenses) provided by informed local sources, such as government agencies, financial institutions, realtors, buyers,, sellers, property owners, bookkeepers, accountants, attorneys, and others is assumed to be true, correct, and reliable. No responsibility for the accuracy of such information is assumed by the appraiser.

The comparable sales data relied upon in this appraisal is believed to be from reliable sources. Though all the comparable sales were examined, it was not possible to inspect them all in detail. The value conclusions are subject to the accuracy of said data.

Engineering analyses of the subject property were neither provided for use nor made as a part of the appraisal contract. Any representation as to the suitability of the property for uses suggested in this analysis is, therefore, based only upon a rudimentary investigation by the appraiser and the value conclusions are subject to said limitations.

All values shown in the appraisal report are projections based on an analysis as of the date of the appraisal. These values may not be valid in other time periods or as conditions change. Since the projected mathematical models are based on estimates and assumptions which are inherently subject to uncertainty and variation depending upon evolving events, we do not represent them as results that will actually be achieved.

This appraisal is an estimate of value based on an analysis of information known to the appraiser at the time the appraisal was made. If new information of significance comes to light, the value given in this report is subject to change without notice.

- 9. Only when prior arrangements have been made will the appraisers be required to attend any court and give testimony pursuant to any portion of this report.
- 10. This appraisal shall in no way be combined with other appraisal reports.
- 11. The appraisal report shall not be quoted or referred to in any report or financial statement or in any documents filed with any governmental agency without the prior written consent of the appraiser. Neither all nor any part of the contents of the appraisal report shall be disseminated to the public through advertising media, public relations media, news media, sales media, or other public means of communication without the prior written consent and approval of the appraiser.
- 12. The value concluded in this report is based upon the entire report and should not be accepted as an indication of value if any part is used separate from the entire report.
- 13. Unless otherwise stated in this report, the existence of hazardous material, which may or may not be present on the property, was not observed by the appraiser. The appraiser has no knowledge of the existence of such materials on or in the property. The appraiser, however, is not qualified to detect such substances. The presence of substances such as asbestos, urea-formaldehyde foam insulation, or other potentially hazardous materials may affect the value of the property. The value estimate is predicated on the assumption that there is no such material on or in the property that would cause a loss in value. No responsibility is assumed for any such conditions, or for any expertise or engineering knowledge required to discover them. The client is urged to retain an expert in this field, if desired.

14. It is assumed that the property meets all requirements set forth by the Americans With Disabilities Act unless otherwise noted in the appraisal.

DATE: __December 23, 2022_

Jim R. Artman

Jen R. artma

Certified General Appraiser

No. 10289CGA

SUMMARY OF SALIENT FACTS AND CONCLUSIONS

Property Type: Vacant & unimproved land

Property Location: East side of Goddard Avenue, west of Newton

Drive (now closed), ±470 feet north of Lexington Avenue, and due south of the City of Norman Public Works Department within the

University of Oklahoma Research Park North

Norman, Oklahoma

Effective Date

Of Appraisal: December 19, 2022

Date of Report: December 23, 2022

Property Rights

Appraised: Fee simple interest or fee simple estate

Owner of Record: University of Oklahoma

Site: Irregular shaped interior site with an area

of ±13.3 acres.

Zoning: None or unclassified (UNC). Subject property

is owned by the University of Oklahoma and is

not subject to any zoning by the City of

Norman. The Norman 2025 Land Use &

Transportation Plan designates the future use

as industrial.

Highest and

Best Use: Light industrial or institutional use

Improvements: None included.

Market Value As If

Vacant & Unimproved: \$1,738,000

PURPOSE OF APPRAISAL:

The purpose of this appraisal is to estimate the market value of the fee simple interest in the subject property as if vacant and unimproved, subject to the restrictions of record and assumptions and limiting conditions as set forth.

"Market Value" is defined as follows:

The most probable price which a property should bring in a competitive and open market under all conditions requisite to a fair sale, the buyer and seller each acting prudently, knowledgeably and assuming the price is not affected by undue stimulus. Implicit in this definition is the consummation of a sale as of a specified date and the passing of title from seller to buyer under conditions whereby:

- 1. the buyer and seller are typically motivated;
- 2. both parties are well informed or well advised and each acting in what they consider their own best interest;
- 3. a reasonable time is allowed for exposure to the open market;
- 4. payment is made in terms of cash in U.S. dollars or in terms of financial arrangements comparable thereto; and
- 5. the price represents the normal consideration for the property sold unaffected by special or creative financing or sales concessions granted by anyone associated with the sale.

(Definition per FIRREA. 12 C.F.R., Part 34.42(g); 55 Federal Register 34696, August 24, 1990, as amended at 57 Federal Register 12202, April 9, 1992; 59 Federal Register 29499, June 7, 1994)

EFFECTIVE DATE OF APPRAISAL:

The effective date of appraisal for this assignment is December 19, 2022. The subject property was inspected by the appraiser on two occasions, the most recent of which was December 19, 2022.

DATE OF REPORT:

The date of this report is December 23, 2022.

PROPERTY RIGHTS APPRAISED:

The property rights appraised are those of "Fee Simple Estate," as if unencumbered by mortgages or liens, exclusive of any material interest and subject to zoning, easements, and restrictions of record. "Fee Simple Estate" is defined as:

"Absolute ownership unencumbered by any other interest or estate subject only to the limitations imposed by the governmental powers of taxation, eminent domain, police power, and escheat." (The Dictionary of Real Estate Appraisal, Fourth Edition, 2002, Appraisal Institute)

Fee simple estate is also referred to as "fee simple interest".

FUNCTION OF APPRAISAL:

The function of the appraisal is to inform the client of the market value of the fee simple interest in the property as if vacant and unimproved, subject to the restrictions of record and the assumptions and limiting conditions as set forth. The client for this appraisal assignment is ADG/Blatt Architects. The intended users of this appraisal report are ADG/Blatt Architects, the City of Norman, and the University of Oklahoma. The intended use of the appraisal is for use in the acquisition of the property by the City of Norman.

SCOPE OF APPRAISAL:

According to the Uniform Standards of Professional Appraisal Practice (USPAP), it is the appraiser's responsibility to determine the appropriate scope of work. The scope of work must be sufficient to develop credible assignment results.

USPAP defines "scope of work" as follows:

"The type and extent of research and analyses in an assignment."

Scope of work includes, but is not limited to, the following:

- the extent to which the property is identified;
- the extent to which tangible property is inspected;
- the type and extent of data researched; and
- the type and extent of analyses applied to arrive at opinions or conclusions.

The scope of work utilized in this appraisal is intended to be commensurate with the type and complexity of its purpose. According to the client (ADG/Blatt Architects), the intended use of the appraisal is for use in the acquisition of the property by the City of Norman. This appraisal has been prepared in compliance with the Uniform Standards of Professional Appraisal Practice (USPAP) promulgated by the Appraisal Standards Board of the Appraisal Foundation.

The scope of work includes various independent investigations and analyses made by the appraiser which are briefly described as follows:

- (1) A physical inspection of the property was made by the appraiser on two occasions, the most recent of which was December 19, 2022.
- (2) An analysis of the plot plan for the property as well as all physical characteristics, zoning, availability of utilities, easements, highest and best use, and other site factors pertinent to the site was completed.
- (3) An analysis of the subject market area, the subject neighborhood, and current market conditions in the area was completed, particularly with respect to the market for comparable unimproved tracts of land with similar highest and best use.
- (4) A search of the general area was conducted for recent sales of comparable unimproved tracts of land with similar highest and best use (light industrial).
- (5) The market value of the property was estimated utilizing the Sales Comparison Approach, the only applicable approach to value.

The process of preparing this appraisal report involved the utilization of public as well as private data sources which include Multiple Listing Services, Real Estate Appraisal Data, Inc., the County Assessor's records, the County Clerk's records, local realtors and brokers, lenders, appraisers, buyers, sellers, and other professionals possessing pertinent knowledge relating to this specific appraisal assignment. The subject site and the comparable sales utilized in this appraisal have been personally inspected by the appraiser.

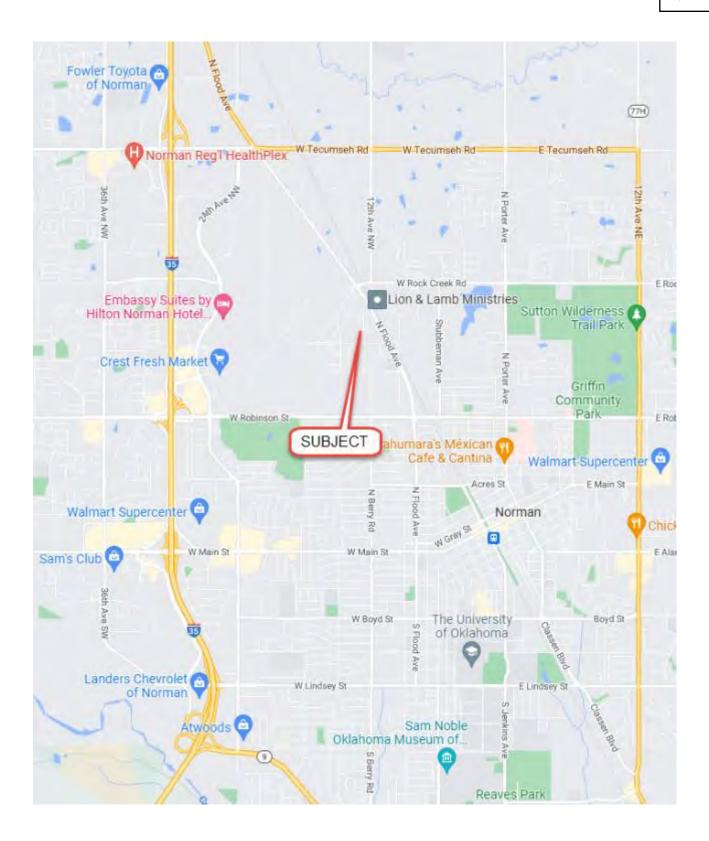
LEGAL DESCRIPTION:

Part of the Northeast Quarter (NE/4) of Section Twenty-Four (24), Township Nine (9) North, Range Three (3) West, of the I.M., and part of the Northwest Quarter (NW/4) of Section Nineteen (19), Township Nine (9), North, Range Two (2) West, of the I.M., Cleveland County, Oklahoma.

No exact legal description for the subject property was available to the appraiser. The subject tract is identified in various exhibits in this report.

OWNERSHIP HISTORY:

The current owner of record for the subject property is the University of Oklahoma. The subject property has not sold or changed ownership within the past three years. The subject property is not currently listed for sale.





NORMAN OKLAHOMA



Diswotown Norman

Oklahoma's Best Place to Live

-Movoto Real Estate, 2014

America's Second Least Expensive City to Live in

-Cost of Living Index, 2014

NORMAN OKLAHOMA



is a dynamic, diverse community with a vivid history and a vibrant future! Strategically located in the bustling Oklahoma City metropolitan area, Norman is in the center of the county on busy Interstate 35. With a short drive to downtown Oklahoma City and to DFW and with flights from Will Rogers World Airport to destination hubs all across the U.S., Norman has easy access to anywhere in the world.

Home to the state's premier research university, the University of Oklahoma, Norman is teeming with incredible talent. Energetic, educated students continually feed a strong, stable workforce in a region known for its solid work ethic.

And we intend to keep those students here after graduation. The residents of Norman recently voted overwhelmingly in support of a one-half percent sales tax to fund \$148 million in quality of life investments in parks, libraries, recreational facilities, sports complexes, trails and public art. The initiative, called NORMAN FORWARD, underscores out citizens' remarkable commitment to Norman's future!

Contributing to the quality of life is a premier park system, quality golf courses and Lake Thunderbird State Park's recreational opportunities that include boating, fishing, bird watching and hiking. Year-round festivals, fairs and Main Street events create a friendly, hometown atmosphere among big city amenities, arts and culture.

From the historic downtown to numerous shopping centers and malls, Norman has a myriad of shopping options from national stores to local boutiques.

Norman Regional Health Systems provides the best in health and preventative care. The Norman Public School System consistently scores above the state averages in every sector of testing. The Moore Norman Technology Center has received a long list of awards and accreditations.

Major employers offering quality jobs opportunities include Johnson Controls, National Oceanic and Atmospheric Administration (NOAA), Weathernews, Hitachi, SYSCO Foods, Chickasaw National Industries and Astellas. Some of the local emerging employers include AGIO, Health Engineering Systems and Immuno-Mycologics (IMMY).

We are a thriving community with purpose and drive... and our only direction is NORMAN FORWARD!

Lynne Miller, Mayor



2

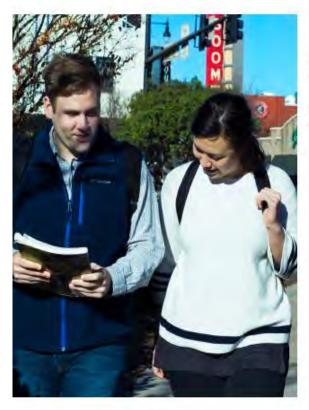
ONE VISIT and you'll know why we call Norman HOME.



Campus Comer



POPULATION NORMAN



Norman median resident age: 30.3 years Oklahoma median resident age: 36.3 years

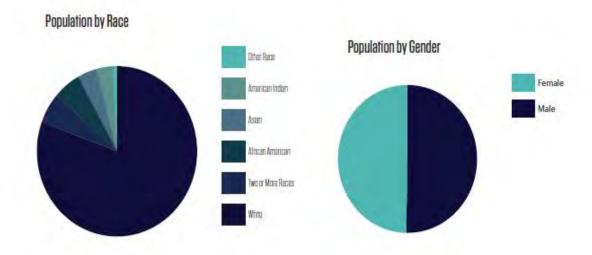
Norman cost of living index is 83.8%, which is 16.2% below the national average

Norman Population

120,866

Population Growth Since 2000

+21.4%



TRANSPORTATION NORMAN



LOCATION

Conveniently located on I-35, Norman provides easy accesss to markets across the nation. Only 20 miles south of I-40 and 30 miles south of I-44, Norman sits in the middle of America, a perfect location for all business. Norman is located in the Central Standard Time Zone in the United States.

NORMAN FACTS

County: Cleveland

Nearest Major City: Oklahoma City, 17 miles

City Size in Square Miles: 190

Elevation: 1,170 ft.

NORMAN TRAFFIC COUNTS

Tecumseh & I-35	16,764 AVPD
Robinson & 36th Ave NW	20,696 AVPD
Robinson & I-35	25,725 AVPD
Main & 36th Ave NW	17,199 AVPD
Porter & Alameda	13,548 AVPD
Alameda & 12th Ave E	28,479 AVPD
Lindsey & I-35	20,923 AVPD
*AVDD / Augrass Validate Day Day)	

*AVPD (Average Vehicles Per Day)

DISTANCES TO MAJOR CITIES

Dallas	189 miles
Little Rock	344 mtles
Kansas City	367 mtles
Houston	516 miles
St. Louis	516 mtles
Albuquerque	562 mtles
Denver	694 miles
Chicago	811 miles

WILL ROGERS WORLD AIRPORT, OKLAHOMA CITY

Distance from Norman: 20 miles

Major airlines include: Allegiant, US Airways, Delta, Frontier, United and Southwest

Major freight carrier services include: Airborne Express, BAX global, Evergreen Eagle, FedEx, Integrated Airline Services, UPS and the U.S. Postal Service

MAX WESTHEIMER AIRPORT, NORMAN

Located in the University of Oklahoma Research Park, Max Westheimer Airport serves both business executives and recreational pilots. With runway lengths of 5,200 feet north/south and 4,750 feet northeast/southwest the airport has medium intensity runway and approach lights with Visual Approach Slope Indicators serving executive jet aircraft. The control tower operates seven days a week from 8am to 10pm. AV Gas and Jet A are available from 6am to 10pm. FBO is provided by Cruise Aviation Association Inc., which sells fuel and performs aircraft repair. A flight school is provided through the University of Oklahoma Aviation Division.

PUBLIC TRANSPORTATION

The Cleveland Area Rapid Transit (CART) Service provides a comprehensive public transportation system around the Norman area and links to Oklahoma City.

Greyhound Lines Inc. provides service in Norman.

The Port of Catoosa is the nearest river port, approximately 100 miles away.

RAILROAD

Norman's train station, located right off Main Street, has daily stops on the AMTRAK Heartland Flyer line between Oklahoma City and Fort Worth, Texas. Norman is also on the main line of the Santa Fe/Burlington Northern Railroad.

BUSINESS INCENTIVES NORMAN



THE OKLAHOMA QUALITY JOBS PROGRAM

This incentive program provides quarterly cash payments of up to 5% of newly created gross taxable payroll to a qualifying company. A fully executed contract with the Oklahoma Department of Commerce must be in place before any new direct job's salaries are included in the new taxable payroll. Payments are made quarterly for three years and if thresholds are achieved, they may extend for an additional seven years.

EMPLOYEE TRAINING FOR INDUSTRY

The Oklahoma Department of Career and Technology Education (Career Tech) assists qualifying businesses by paying for training for employees in newly created jobs. Training can be done at one of 56 Technology Centers, including Moore Norman Technology Center (www. mntechnology.com) here in Norman, or at the company's facility. Training agreements include instructor costs. Program services are determined by the number of new jobs created in targeted industries, wage rates, and benefits provided.

SMALL EMPLOYER QUALITY JOBS

This program provides annual cash payments to a qualifying company. The payments may reach as much as 5% of new taxable payroll and last for up to seven years.

AD VALOREM TAX EXEMPTIONS

Several companies may be eligible for ad valorem exemptions for up to five years, including: new and expanding qualifying manufacturers, research and development companies, certain computer services and data processing companies with significant out-of-state sales and aircraft repair and distribution companies.

EXEMPT INVENTORY

Oklahoma's Freeport Law exempts from taxation any goods, wares, and merchandise which come from outside the state and leave the state within nine months where such goods, wares, and merchandise are held for assembly, storage, manufacturing, processing or fabricating purposes within the state.

21st CENTURY QUALITY JOBS

The intended purpose of the program is to promote impactful high wage jobs without competing with existing incentives. To help accomplish this, an enhanced list of qualifying industries beyond just those eligible for the Quality Jobs Program has been added. Qualifying companies may be eligible for up to twice the Net Benefit rate of the Quality Jobs program, or 10% of the taxable payroll of these new jobs, to be paid on a quarterly basis. The program lasts for up to 10 years.

* For a complete list of Oklahoma business incentives, visit www.okcommerce.gov.

Income Tax	
Personal Income Tax: Corporate Tax Rate:	5.25% max 6.0%
Property Tax (Ad Valorem)	
City: County: Public Schools: Technology: Total: "Valuation is 12% of Fall Market y	\$ 14.00 \$ 23.07 \$ 64.46 \$ 18.90 \$120.43
Sales Tax	
State of Oklahoma: City of Norman: Cleveland County:	4.5% 4.00% 0.25%

LABOR NORMAN



MAJOR EMPLOYERS

THE STATE OF LETTE	
The University of Oklahoma:	12,94
Norman Regional Hospital:	3,040
Norman Public Schools:	1,806
Johnson Controls:	1,030
Walmart Supercenters:	950
City of Norman:	859
Riverwind Casinos:	838
Hitacht:	460
National Oceanic & Atmospheric	
Administration (NOAA):	400
Super Target:	380
Oklahoma Veterans Center:	350
U.S. Postal Service - NCED:	350
SYSCO Foods:	337
Cimarron Energy:	275
SITEL:	264
Arvest Bank:	258
Moore-Norman Technology Center:	246
Avara Technologies:	250
AT&T:	225
Chickasaw Nation Industries:	163
Thunderbird Casino:	190
Republic Bank & Trust:	150
Power Cost, Inc.:	140
Southwestern Wire:	135
MCSI:	123
Top of the World:	100

*Please note that employee numbers are subject to change.

Unemployment Rate (%)



MEDIAN WAGE

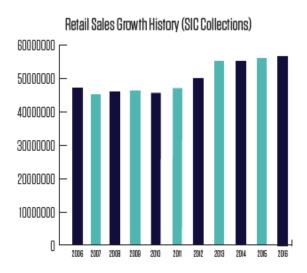
Management:	\$39.38
Business & Financial:	\$28.99
Education, Training, & Library:	\$21.80
Art, Design, Entertainment,	
Sports & Media:	\$19.20
Health Care Practitioners & Technical:	\$34.44
Health Care Support:	\$13.04
Food Preparations and Serving-related:	\$ 9.86
Butlding and Grounds Cleaning	
& Maintenance:	\$12.34
Protective Services:	\$20.32
Sales & Related:	\$14.39
Office & Administrative Support:	\$15.55
Construction & Extraction:	\$18.63
Installation, Maintenance & Repair:	\$20.39
Production:	\$15.29
Transportation:	\$13.02
Personal Care & Service:	\$10.50
Farming, Fishing & Forestry:	\$ 8.78
Computer & Mathematical:	\$34.41
Architecture & Engineering:	\$28.67
Life, Physical & Social Science:	\$26.68
Community & Social Services:	\$19.91

EMERGING EMPLOYERS

Atmospheric Technology Services	
Company:	99
Weather Decision Technology:	85
StoneHouse Marketing:	81
Weathernews:	67
AGIO:	58
Immuno-Mycologics:	40
Health Engineering Systems:	35.

T

INCOME & SHOPPING NORMAN



UNIVERSITY TOWN CENTER

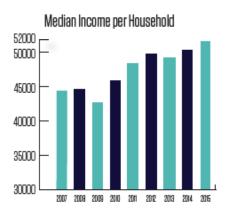
Located north of Robinson Street just off I-35, University Town Center brings Oklahoma the finest in open-air shopping, including Target, Kohls, PetCo and many more. With Phase I completed already, this center has future plans of a movie theatre, eight-acre park and two more hotels as well as expanding the selection of department stores. Upon completion University Town Center will be more than 2 million square feet.

HISTORIC DOWNTOWN NORMAN

A unique mixture of antique shops, coffee bars, art galleries and restaurants, downtown Norman provides the classic downtown feel with an artsy edge.

BROOKHAVEN VILLAGE

Located at 36th NW and Robinson, Brookhaven Village features boutiques such as Chico's, Jos. A. Bank, Talbots and J. Spencer. After a long day of shopping, stop by Pub W or Louie's to watch the game.



SOONER MALL

with 70 boutiques, three large department stores, a food court and children's play station, Sooner Mall has something for the whole family. Convieniently located on Main Street off I-35, this mall provides easy access to exciting shopping, dining and entertainment. Anchor stores include Aeropostale, American Eagle, Dillard's, Eddie Bauer, Express, Gap, JC Penny, Old Navy, Sears and many more.

CAMPUS CORNER

Just across the street from the University of Oklahoma, Campus Corner offers unique shopping, delicious restaurants, stylish salons and classic pubs. With everything from trendy shops like Shoetopia and Blush to unique dining experiences like Caribbean Cuisine and Victoria's Pasta Shop, Campus Corner provides the perfect atmosphere for every occasion.

PARKWAY PLAZA

Commonly referred to as 'Restaurant Row,'
Parkway Plaza boasts countless shops, restaurants
and other specialty stores. Featuring well-known
favorites such as BJ's, Charleston's and Interurban,
Parkway Plaza runs along Ed Noble Parkway from
Lindsey to Main Street. After eating stop by one of
the many large retail chains such as Toys R Us, Bed
Bath & Beyond, and Barnes and Noble.

HOUSING NORMAN



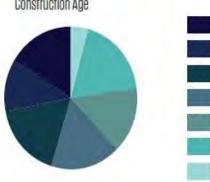
HOUSING QUICK FACTS

Average Sales Price: \$200,811 Average Days on Market: 53

HOUSING COST

\$1,996 Median Real Estate Tax: Median Year Structure was Built: 1981 Single Family Housing Units: 50,431 Median Rent: \$848

Construction Age





Year	# of Permits	Commercial Value	Residential Value	Total Construction Value
2003	1296	\$ 42,341,237	\$ 103,486,420	\$ 145,827,657
2004	1606	\$ 54,583,537	\$ 171,409,339	\$ 225,992,876
2005	1508	\$ 49,561,566	\$ 156,204,279	\$ 205,765,845
2006	1379	\$ 46,146,469	\$ 117,824,296	\$ 163,970,792
2007	1244	\$ 221,652,412	\$ 92,393,692	\$ 314,046,104
2008	1395	\$ 72,957,512	\$ 104,068,686	\$ 177,026,199
2009	1100	\$ 116,968,254	\$ 92,393,692	\$ 191,536,967
2010	1222	\$ 73,709,847	\$ 174,568,713	\$ 166,617,474
2011	1338	\$117,062,375	\$ 80,104,665	\$ 197,167,040
2012	1776	\$ 85,513,383	\$ 127,466,768	\$ 212,980,151
2013	2754	\$ 84,543,886	\$ 132,909,593	\$ 217,453,449
2014	1013	\$ 85,091,436	\$ 149,843,679	\$ 234,935,115
2015	549	\$ 47,758,087	\$ 131,088,632	\$ 178,846,719
2016	667	\$ 113,244,368	\$ 197,895,839	\$ 311,140,207

EDUCATION NORMAN



University of Oklahoma Student Union

UNIVERSITY OF OKLAHOMA

Known as a major national research university, the University of Oklahoma serves the educational, cultural and economic needs of Norman, the state, region and nation. Created by the Oklahoma Territorial Legislature in 1890, OU has 21 colleges offering 171 majors at the baccalaureate level, 152 majors at the master's level, 79 majors at the doctoral level, 32 majors at the first professional level and 35 graduate certificates. OU's enrollment is more than 30,000 students and the university has more National Merit Scholars per capita than any other public university in America. Ranked in the top 10 universities in the nation by The Princeton Review, OU has produced 29 Rhodes Scholars and 51 Goldwater Scholarship recipients for math and science.

MOORE NORMAN TECHNOLOGY CENTER

With a reputation for excellence, MNTC is viewed as one of the nation's premier educational and training institutions.

Accredited by the North Central Association Commission on Accreditation and School Improvement, MNTC provides high school and adult students a quality and affordable career through a technical education. Moore Norman Technology Center also provides professional assistance to businesses in order to help them achieve their business goals.

UNIVERSITY OF PHOENIX

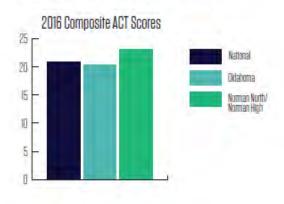
Targeted towards working adults, the University of Phoenix offers the flexibility of obtaining a bachelor's or master's degree while working full time. With a complete online program, students can earn their bachelor's degree in eight different programs or their master's degree in seven specialized areas.

EDUCATION NORMAN



NORMAN PUBLIC SCHOOLS (NPS)

Recognized at the state and national level for exceptional teachers and instruction programs, NPS had 11 National Merit Finalists in the 2015-2016 school year. Students from NPS continually succeed in athletics, drama, competitive speech and debate, poetry, writing, studio art, band, orchestra and student newspaper. In fact NEWSWEEK Magazine listed Norman North High School and Norman High School in the top 5% of high schools in the nation. In 2016, Norman North and Norman High scored 2 points higher than the national average on the ACT test.



DISTRICT ENROLLMENT

Elementary	7,842
Middle School	3,452
High School	4,650
Total Students	15,944

OTHER HIGHER EDUCATION INSTITUTIONS

FOUR-YEAR INSTITUTIONS

East Central University
Langston University
Mid-America Christian University
Oklahoma Baptist University
Oklahoma Christian University
Oklahoma City University
Oklahoma State University at OKC
Southern Nazarene University
St. Gregory's University
University of Science & Arts of Oklahoma
The University of Central Oklahoma

TWO YEAR INSTITUTIONS

Hillsdale Freewill Baptist College Oklahoma City Community College Rose State College

CAREER/TECHNICAL COLLEGES DKI AHOMA GITY AREA

ATI Career Training Center
DeVry University
Heritage Institute
ITT Technical Institute
Keller Graduate School of Management
TechSkills
Vatterott College
Wright Business School

BUSINESS RECOURCES NORMAN



ELECTRICITY

Oklahoma Gas & Electric Company Oklahoma Electric Cooperative

GAS

Oklahoma Natural Gas

WATER Supplier:

Lake Thunderbird/Wells Source: System Capacity: 22,350,000 GPD Daily Production: Max: 18,250,000 GPD

Min: 7,813,000 GPD

City of Norman

SEWER

Sewer Treatment Authority: City of Norman Sewage Capacity: 17,000,000 GPD

TELECOMMUNICATIONS

AT&T

Cox Communications

TELECOMMUNICATIONS SERVICES AVAILABLE

Digital Services Fiber Optics Point of Presence

BUSINESS ASSISTANCE

Norman Economic Development Coalition Jason Smith, CEcD President & CEO 128 E. Main

Norman, OK 73069 Phone: (405)573-1900

IMPORTANT WEBSITES

City of Norman: Moore Norman Technology Center: Norman Chamber of Commerce: Norman Public Schools: Oklahoma Department of Commerce: Oklahoma Employment Security Commission: www.oesc.ok.gov University of Oklahoma:

www.cityofnorman.com www.mntechnology.com www.selectnorman.com www.normanchamber.com www.norman.k12.ok.us www.okcommerce.gov www.ou.edu www.visitnorman.com

VisitNorman:

HEALTH CARE NORMAN



Norman Regional Health Plex

NORMAN REGIONAL HEALTH SYSTEM

Providing quality and compassionate health care services and education, the Norman Regional Health System (NRHS) serves the regional Norman community extending throughout south central Oklahoma. With over 2,950 employees and 356 active-staff physicians, NRHS provides outpatient diagnostic centers, medical transport services, physician services, community wellness and employer health services.

GRIFFIN MEMORIAL HOSPITAL

An adult inpatient psychiatric teaching hospital offering comprehensive services for mental health clients. The Griffin Memorial Hospital offers its patients psychiatric and psychological evaluation, psychotherapy, activities therapy, chemotherapy, and psychiatric rehabilitation.

SENIOR CARE

Norman features a vast array of services available for our senior adults, including nursing homes and senior assisted living.

OKLAHOMA VETERANS CENTER NORMAN DIVISION

Offering long-term, skilled and non-skilled nursing care to eligible Oklahoma veterans, the Oklahoma Veterans Center in Norman features a state-of-the-art, 301-bed complex.

J.D. McCARTY CENTER FOR CHILDREN WITH DEVELOPMENTAL DISABILITIES

A rehabilitation hospital where Oklahoma's children with development disabilities learn to move, act, play, think and communicate better and where parents find relief from overwhelming responsibilities. Both inpatient and outpatient care are available.

NORMAN SPECIALTY HOSPITAL

A Long-term Acute Care Hospital (LTACH) that specializes in treating patients with serious and often complex medical conditions requiring a longer length of stay, Norman Specialty Hospital focuses on building strength, improving mobility and increasing independence.

QUALITY OF LIFE NORMAN

PARKS & RECREATION

The Parks & Recreation department features a full schedule of programs. Norman has 62 parks, including a championship golf course, municipal swimming pool complex with a water slide, hiking trails, Frisbee golf course, fishing, tennis courts, playgrounds, open and covered picnic areas and indoor recreation centers. The recreation programs include sports leagues and clinics, dance and exercise classes and a senior citizens' center. The Griffin Park Sports Complex encompasses 16 soccer fields, 14 baseball/softball fields and four football fields. Norman also features a full service YMCA with an indoor pool and track.

RECREATIONAL FACILITIES

Public Recreation Centers: 3
Miles of walking trails: 14.07
Miles of bicycle routes: 120.37
Golf Courses: 6
Swimming Pools: 4
Private Health & Fitness Centers: 19

GOLF

Norman boasts two 18-hole public golf courses: City of Norman Westwood Golf Course and Jimmie Austin University of Oklahoma Golf Course, in addition to two 18-hole private courses: The Trails and Belmar Golf Club. Norman also has a nine-hole par three course at Cobblestone Creek Golf Club.

SPORTING EVENTS

Home to the University of Oklahoma Sooners, Norman sports are always in season. Consistently appearing among top ranked teams, OU football, baseball, softball, soccer, wrestling, basketball, golf and gymnastics means there is an event for every sport lover.

CHURCHES

There are over 100 churches representing a variety of different denominations in the Norman community.

HOTELS/MOTELS

Norman offers seven bed-and-breakfasts and 22 hotels and motels offering a wide variety of accommodations.

NORMAN PUBLIC LIBRARY

The Norman Public Library has over 2,000 iPhone and iPod compatible books available. The Norman branch is the headquarters of the Pioneer Library System, serving nine communities in central Oklahoma.

LAKE THUNDERBIRD STATE PARK

Just a couple miles down Highway 9, Lake Thunderbird provides outdoor enthusiasts with a 6,000-acre lake perfect for wake boarding, picnics, barbecues or just a relaxing day on the water. Complete with R.V. hook-ups, camping facilities and two full size marinas, Lake Thunderbird has everything for the perfect outdoor adventure.

DINING OUT

Norman has a wide variety of restaurants that will appeal to anyone's tastes. Cuisines represented in over 260 restaurants and cafeterias include barbecue, Asian (Chinese, Indian, Japanese, Thai), Greek, Italian, Mexican, seafood, and natural foods.

CRIME RATE

Norman crime rate per 1,000 population: 38.9% Norman police officers per 1,000 population: 1.36 Total Norman police officers: 158 Norman fire ghters per 1,000 population: 1.39 Total Norman firefighters: 159



Lake Thursderbird







Sconer Stampede at Lake Thunderbird

ARTS + ENTERTAINMENT NORMAN



SAM NOBLE MUSEUM OF NATURAL HISTORY

On the University of Oklahoma campus, the Sam Noble Museum of Natural History brings in approximately 150,000 visitors a year to enjoy the constantly evolving selection of art and exhibits. With curators actively involved in field research around the world, the museum provides a great experience for children and families of all ages.

FRED JONES JR. MUSEUM OF ART

Described as one of the finest university art museums in the country, this museum holds the most important collection of French Impressionism ever given to an American public university. The museum also holds large collections of East Asian and Native American art including artists such as Stuart Davis, Georgia O'Keeffe and Edward Hopper.

SOONER THEATRE

Originally created for "talking pictures", the theatre opened in 1929 as the first movie theatre in the region. In 1982 the theatre reopened her doors as a community performing art center and now hosts concerts, movies, theatrical shows and more.

RUPEL J. JONES THEATRE

A 600-seat theatre featuring productions by the University of Oklahoma School of Drama, School of Dance, Musical Theater Program and OU Summer Stage Lab Theater.

FESTIVALS

Norman, the 'city of festivals', is home to over a dozen annual festivals, parades and community events. Some favorites include Norman Music Festival, Medieval Fair, Jazz in June and Groovefest.

CLEVELAND COUNTY HISTORICAL MUSEUM

An excellent example of traditional Victorian architecture, the Historical House showcases a collection of manuscripts, letters, diaries and photographs pertaining to early Norman and Oklahoma.

THE CRUCIBLE FOUNDRY

With a wide range of talents and specialties, the Foundry specializes in bronze sculptures and monumental pieces. The Crucible employes the largest kiln west of the Mississippi to create their unique masterpieces of up to 900 pounds.

FIREHOUSE ART CENTER

Founded in 1971 by three local artists, the Firehouse Art Center fosters appreciation, enjoyment and development of art. Focused exclusively on visual arts, the Center provides the community with studio classes, workshops, special programs and exhibitions.

THE JACOBSON HOUSE

Native American Art Center Bringing in art exhibits, cultural activities, lectures, workshops and educational events to the public. The Jacobson house stands as a living symbol of the recognition of Native American art as the medium speaking to every person.

THE NORMAN DEPOT

Hosting various Norman events, the Norman train station serves as a reminder of the origin of many Oklahoma towns. The restored depot serves as a station for the Heartland Flyer.







Norman Music Festival



Sooner Theate



Sam Noble Museum



Fred Jones Museum

17





128 E Man St Norman, OK 73069 TEL: 405-573-1900 Ernal: nedcjaselectnorman.com www.selectnorman.com

The Norman Economic Development Coalition is a joint venture of the University of Oklahoma, the City of Norman, Moore Norman Technology Center and the Sooner Centurions, a committee of the Norman Chamber of Commerce.

MARKET AREA & NEIGHBORHOOD ANALYSIS:

"Market area" is defined as "the defined geographic area in which the subject property competes for the attentions of market participants; the term broadly defines an area containing diverse land uses" (Twelfth Edition of The Appraisal of Real Estate). A "neighborhood" is defined by the Twelfth Edition of The Appraisal of Real Estate as "a grouping of complementary land uses; a related grouping of inhabitants, buildings, or business enterprises." A "district" is defined as "a market area characterized by one predominate land use e.g., apartment, commercial, industrial, agricultural." A market area may encompass one or more neighborhoods or districts. Market areas are defined by a combination of factors - e.g., physical features, the demographic and socioeconomic characteristics of the residents or tenants, the condition of the improvements (age, upkeep, ownership, and vacancy rates), and land use trends. The subject property, market area, and neighborhood are all affected by operation of the four forces that affect property value. These forces include social, economic, governmental, and environmental factors. Beyond an analysis of the region, or city, in which the property is located, it is also important to define the market area and/or neighborhood where it is located. Given specific market area and/or neighborhood boundaries, the social, economic, governmental and environmental influences are considered, and their influence on value can be documented. Analyzing the market area helps to provide a framework, or context,

in which the opinion of property value is developed. The overriding purpose of describing and analyzing a particular market area is to observe and/or quantify data indicating discernible patterns of urban growth, structure, and change that may enhance or detract from property values.

The subject property is located in north Norman within the University of Oklahoma Research Park North, which is bounded on the south by Robinson Street, on the east by U.S. Highway No. 77(Flood Avenue), and on the west and north by Max Westheimer Airport. Max Westheimer Airport, Norman's airport, has been expanded in recent years (including the lengthening of the main north-south runway) to accommodate larger aircraft and jet traffic. Uses within the University of Oklahoma Research Park North include the Cleveland County Family YMCA, American Red Cross Center, National Weather Center, National Oceanic and Atmospheric Administration, National Storm Prediction Center, National Severe Storms Laboratory, Merrick Computer Center, Well Construction Technology Center, U.S. Post Office Technical Training Center (Automotive Training Facility), Norman Fire Department Training Center and Fire Station Number 7, the City of Norman Sanitation Services Facility, the City of Norman Public Works Department, and the City of Norman Solid Waste Division Office Building which is currently under construction. There are

flight schools and airplane hangars contiguous to Max Westheimer Airport.

Interstate 35, the major north-south interstate through central Oklahoma, provides easy access to Oklahoma City and is accessible from Robinson Street or U.S. Highway No. 77(Flood Avenue). central business district is downtown of Norman situated mile southeast of the approximately one subject. Land for development within the University of Oklahoma Research Park is typically ground leased to the various enterprises and companies locating in this area.

Max Westheimer Airport is bounded on the north by Tecumseh Road. There are a few industrial uses along Tecumseh Road between Interstate 35 and U.S. Highway No. 77. Along the east side of U.S. Highway No. 77 to the east of the University of Oklahoma Research Park North is an industrial park (Norman Industrial Tract) and a mobile home park. Further north are several industrial uses and another industrial park known as Northridge Industrial Park. To the south along the south side of Robinson Street is a single-family residential neighborhood. To the southwest is an apartment complex and Westwood Park Golf Course. To the south of Robinson Street and west of Westwood Park Golf Course is a 104.5-acre commercial and office development known as Westport Professional Park. There are

numerous general office and medical or dental office buildings in this development along with a supermarket, several fast-food restaurants, two small retail strip centers, two banks, and an automotive business along 24th Avenue N.W. Numerous office buildings (general and medical or dental) have been completed within the past 10-15 years within Westport Professional Park.

Due west of Max Westheimer Air Park and the University of Oklahoma Research Park (to the north of Robinson Street and east of Interstate 35) between Robinson Street and Tecumseh Road is a 585-acre tract of land which is being developed as a mixed use planned unit development (known as University North Park) with commercial, retail, and office uses including four hotels and a convention center. To date, the development within the first phase of the University North Park project (approximately 300 acres and known as University Town Center) has consisted of primarily retail uses (including several big box retail uses such as the 173,900 square foot Super Target, Kohl's, T.J. Max, Office Depot, Petco, Academy, Home Goods, Michael's, and Designer Shoe Warehouse) along with multiple multi-tenant retail buildings containing numerous smaller retail businesses, and several free-standing restaurants. In addition to the Super Target store, there are approximately 158,516 square feet of retail space in this first phase of University Town Center situated due west, southwest, and northwest of the subject site. The second phase of University Town Center has multiple existing big box tenants (Kohl's, Academy, Designer Shoe Warehouse, Home Goods, and Michael's), along with other smaller retail tenants. There is a full-service hotel and convention center (the 10-story Embassy Suites Hotel and Convention Center) in the development. Three new limited service hotels (including Holiday Inn Express & Suites, Residence Inn by Marriott, and Hampton Inn & Suites) have been constructed directly south of Embassy Suites. Α supermarket (Crest Foods) was constructed on the site due east of the existing NorthPark Shops at University Town Center - Phase 1 and IBC Bank. Other improvements in the University North Park include a retail building occupied by Mathis Brothers Sleep Studio, a Discount Tire Store, an Ashley Furniture Store, a Chuckie Cheese, a tire and automotive service center (Hibdon Tires Plus), and several multi-tenant retail strip centers. There are two banks (IBC Bank and Valliance Bank) at 24th Avenue N.W. and Mount Williams Drive. Several new retail strip centers (including Northpark Shops at University Town Center - Phases 1 & 2) have been constructed over the past ten years along 24th Avenue N.W. The original conceptual plan for the PUD few anticipated office and industrial uses adjacent to the airport and commercial uses near the interstate. The area between Robinson Street and Rock Creek Road consists of retail development along with several hotels and a convention or conference center. The area north of Rock Creek Road extending north to will Tecumseh Road consist of а mixed-use development with commercial, office, and industrial uses. The new overpass over Interstate 35 a Rock Creek Road provides easy access to the University North Park development. There is a 60-acre tract of land located at the northeast corner of $24^{\rm th}$ Avenue N.W. and Rock Creek Road which has been developed as the University North Park Corporate Centre, a proposed 30-acre upscale office park which will feature Class "A" office space and a 30-acre advanced manufacturing center. One building (corporate offices and manufacturing facility for Immuno-Mycologics) has been constructed in the advanced manufacturing center. In University North Park Corporate Centre (Phase I), two or three of the six office building sites will have airport access with a dedicated airport taxiway. Max Westheimer Air Park and the University of Oklahoma Research Park are situated to the east of this 585-acre tract of development land (University North Park development).

The area along Interstate 35 between Robinson Street and Main Street is developed with commercial land uses of various types. The east side of Interstate 35 is almost fully developed with commercial uses for this one mile section. There is a clustering of automobile dealerships in this area which is known as the "Mile of Cars." There are also three hotel/motel properties, a discount super center (Wal-Mart Supercenter), a large home improvement center (Lowe's), a large electronics store (Best Buy), several restaurants, and several

automotive businesses within this area as well as some vacant commercial sites. Along the west side of Interstate 35 are a variety of commercial uses including several hotels, a 14-screen theatre complex, seven restaurants, one automobile dealership, and a used car sales lot. Sooner Mall, a regional shopping mall, is situated on the north side of Main Street and extends from Interstate 35 to 36th Avenue N.W.

SITE ANALYSIS:

The subject site consists of a ±13.3-acre tract of land located on the east side of Goddard Avenue, west of Newton Drive (now closed along the subject property), ±470 feet north of Lexington Avenue, and due south of the City of Norman Public Works Department within the University of Oklahoma Research Park North in Norman. All abutting streets are two-lane asphalt surfaced streets. The site is irregular in shape as shown on the plot plan found on the following pages.

The site is level and appears to have adequate drainage. None of the site is located within any HUD-identified Special Flood Hazard Area (area subject to 100-year flooding or Zone A or AE) according to FEMA Flood Insurance Rate Map Number 40027C0280J effective January 15, 2021. The subject site is situated in Zone X, an area determined to be outside of the 0.2% annual chance flood plain.

City water and sanitary sewer are available and to the site. Electricity, natural gas, telephone, and cable are provided by public utility companies. No apparent adverse easements, encroachments, environmental conditions, or other site factors were noted. No survey of the property was available to the appraiser.

NOTE:

The subject site has been appraised as if vacant and unimproved. There is an existing building on the property at 2113 Goddard Avenue occupied by Sooner Flight Academy which has been given no consideration or value in this appraisal.



ENTRY EXIT GATE (Q)

MATERIALS STORAGE ⊕BIN BLOCKS WITH SHED
⊕BIN BLOCKS @90 WIDE LOADING AND DRIVE/ STAGING

TRASH INCLOSURE

YARD SUPERVISOR BLDG.

@ 32 10'X22' SPACES LIGHT DUTY

RACK STORAGE 10 RACKS FOR SALT SPREADERS

SALT STORAGE AND DISTRIBUTION (26.522 5F) **DERINE MIXING AND TANKS**

O 11 12X60 SPACES @ 6 12X60 SPACES ② 22 12'X44' SPACES.

STREETS AND STORM MAINTENANCE BLDG. #1 10 BAYS 20'X40 @ SHARED WAREHOUSE (5856 SF) Ø 47 9'X20 SPACES Ø 50' CLEAR Ø DOCK

SIGHT PROOF FENCE

EXCESS TRAFFIC MAINTENANCE STORAGE RACKS

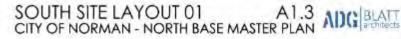
O POLE RACKS SHED 1000030 LAND AREA O 5.7 ACERS

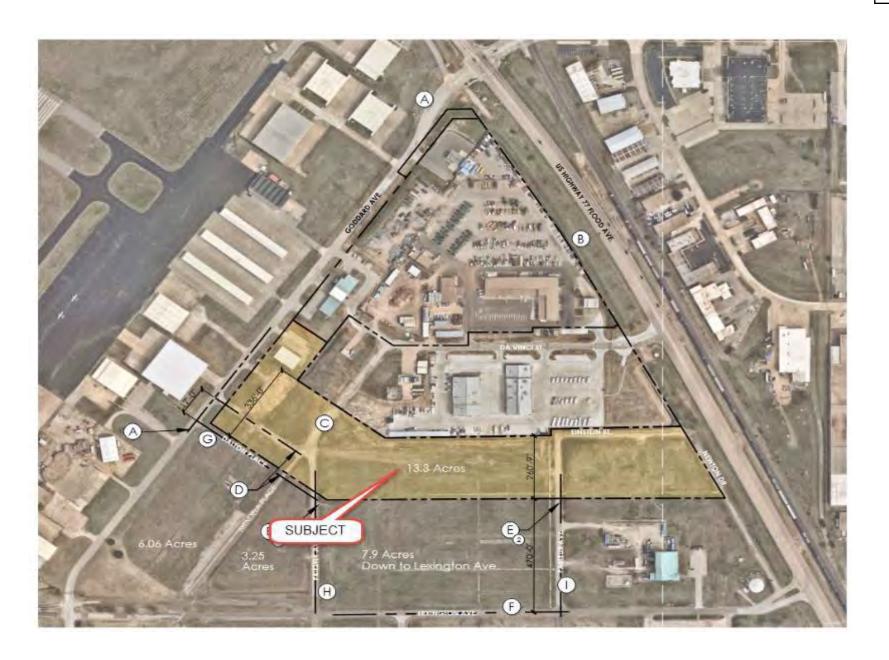
3.8 ACERS FUTURE EXPANSION AREA

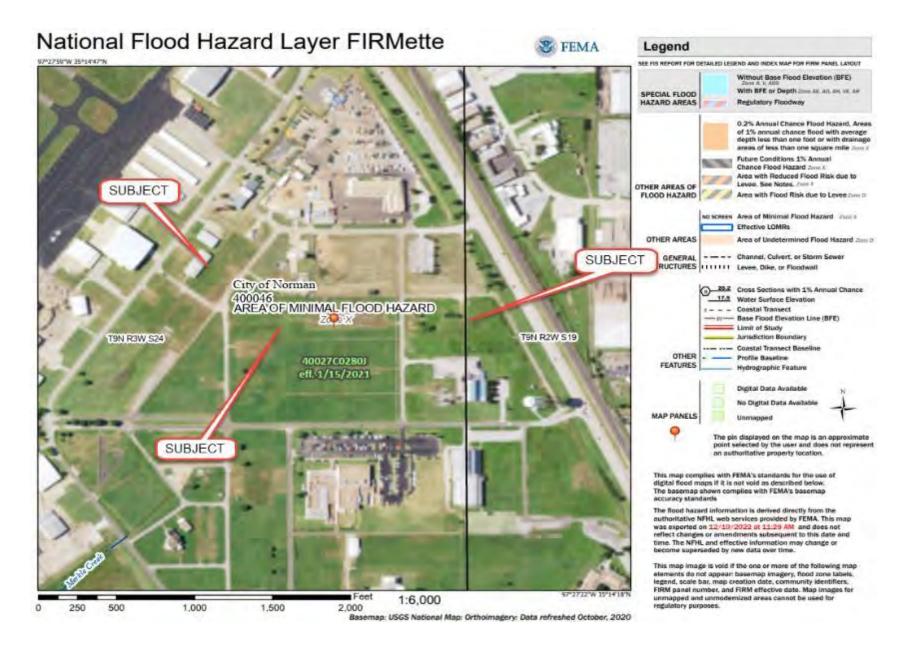
① 7.4 ACERS 3.5 ACERS (B) 8.3 ACERS

LARGE EQUIPMENT PARKING 12 x38' SPACES

Well Construction Technology Center













SUBJECT SITE (VIEW LOOKING WEST FROM EAST BOUNDARY OF SITE)



EAST SECTION OF SUBJECT SITE LOOKING EAST FROM PASTEUR AVENUE



CENTER SECTION OF SUBJECT SITE (VIEW LOOKING WEST FROM PASTEUR AVENUE)



CENTER SECTION OF SUBJECT SITE (VIEW LOOKING EAST FROM PRIESTLY AVENUE)



WEST SECTION OF SUBJECT SITE LOOKING NORTHWEST FROM PRIESTLY AVENUE



WEST SECTION OF SUBJECT SITE LOOKING EAST FROM GODDARD AVENUE



N.W. SECTION OF SUBJECT SITE LOOKING N.E. FROM GODDARD AVE. (IMPROVED WITH A BUILDING)



N.W. SECTION OF SUBJECT SITE LOOKING S.E. FROM GODDARD AVE.(IMPROVED WITH A BUILDING)

ZONING:

The subject property is located within the University of Oklahoma Research Park North which is owned by the University of Oklahoma and is not subject to any zoning from the City of Norman. However, the use of the land is subject to the approval of the University of The existing and anticipated land uses in the University Oklahoma. of Oklahoma Research Park North conform primarily to the various office/commercial and light industrial zoning districts for Norman. The existing and anticipated land uses within University of Oklahoma Research Park North include research facilities, office facilities, governmental educational facilities, institutional uses, (National Weather Service/National Oceanic and Atmospheric Administration), the Cleveland County Family YMCA, and various types of light industrial uses.

The current zoning for the subject property is shown as "A-2" Rural Agricultural District on the City of Norman zoning map. However, the subject property actually has no zoning or is designated as unclassified (UNC). The zoning for the land to the north of the subject site is shown as "I-1" Light Industrial District by the City of Norman.

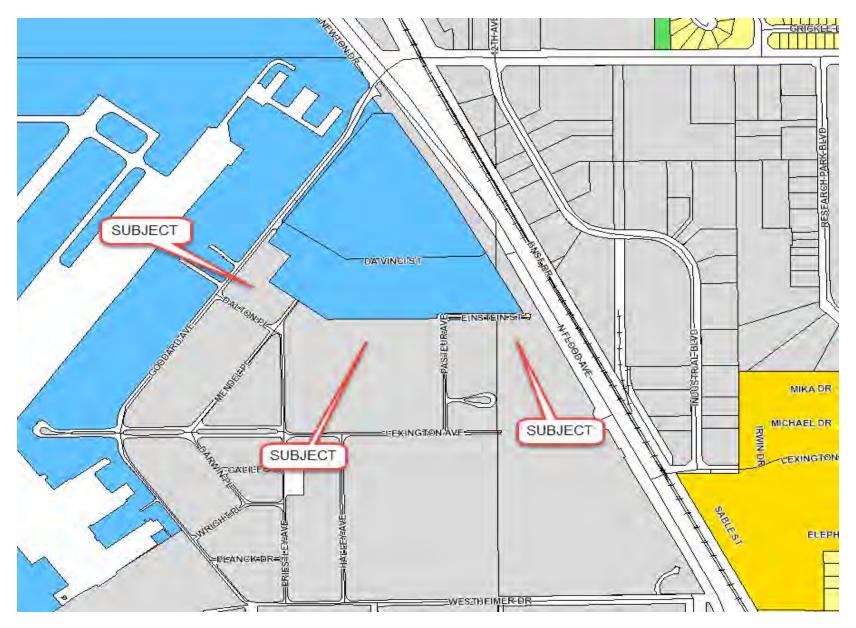
The Norman 2025 Land Use and Transportation Plan designates the future use of the subject property as industrial. On the following

pages can be found the City of Norman zoning map and 2025 Land Use and Transportation Plan for the subject property.



Legend





Norman 2025

Very Low Density Residential

Low Density Residential

Medium Residential

High Density Residential

Office

Commercial

Industrial

Institutional

County Residential

Open

Flood Plain

park

Lakepool / Floodway

Mixed Use

HIGHEST AND BEST USE:

Fundamental to the appraisal concept is the theory of highest and most profitable use of the land. The valuation of land is manifest in the use which produces the highest net return to the land. The valuation of the subject site is, therefore, dependent upon the use.

Highest and best use may be defined as:

"The reasonably probable and legal use of vacant land or an improved property that is physically possible, appropriately supported, and financially feasible, and that results in the highest value." (The Dictionary of Real Estate Appraisal, Fourth Edition, Page 135, Appraisal Institute, 2002)

In addition to being reasonably probable, the highest and best use of both the land as though vacant and the property as improved must met four implicit criteria. That is, the highest and best use must be:

- 1. Physically possible
- 2. Legally permissible
- 3. Financially feasible
- 4. Maximally productive

These criteria are often considered sequentially. The tests of physical possibility and legal permissibility must be applied before

the remaining tests of financial feasibility and maximum productivity.

The highest and best use of the land as if vacant and available for use may be different from the highest and best use of the improved property. This occurs when the improvement is not an appropriate use, but still makes a contribution to the total property value in excess of the value of the land.

The following tests must be met when estimating highest and best use. The use must be legal and permissible, not speculative or conjectural. A demand for the use must exist and it must yield the highest net return to the land for the longest period. These tests are applied to the improved property and the land as if vacant.

Highest and Best Use as a vacant site:

Physically Possible Use:

The first constraint of the possible use of the property is dictated by the physical characteristics of the site. The size and location of the parcel are the most important determinants of value. In general, the larger the site the greater its potential to achieve economies of scale and flexibility in development.

The size of the parcel and the provisions of the zoning have considerable influence on the site's ultimate development. The key determinant in the development of the appraised site is the permitted size of the project. The subject site is irregular in shape with an area of ±13.3 acres. The site has frontage on Goddard Avenue, Pasteur Avenue, and Priestly Avenue. By virtue of its size and shape, the appraised site lends itself to a variety of possible uses. The physical aspects of the site do not impose extraordinary constraints on its development.

Legally Permissible Use:

The only legal restrictions that apply to the sites are private restrictions and the restrictions of public zoning. No private restrictions were found. Easements existing as of the valuation date were not considered detrimental to the use of the property.

The subject property is located within the University of Oklahoma Research Park North which is owned by the University of Oklahoma and is not subject to any zoning from the City of Norman. However, the use of the land is subject to the approval of the University of Oklahoma. The existing and anticipated land uses in the University of Oklahoma Research Park North conform primarily to the various office/commercial and light industrial zoning districts for Norman. The existing and anticipated land uses within University Research

Park include research facilities, office facilities, educational facilities, institutional uses, governmental uses (National Weather Service/National Oceanic and Atmospheric Administration), the Cleveland County Family YMCA, and various types of light industrial uses. The permissible uses include most uses allowed within the following zoning districts (with some exceptions) found within the following City of Norman zoning ordinances: "I-1" Light Industrial District, "M-1" Restricted Industrial District, "CO" Suburban Office Commercial District, "C-1" Local Commercial District, and "C-2" General Commercial District. The subject site appears to be best suited for light industrial use or institutional use.

Financially Feasible Use:

The subject property is located within the University of Oklahoma Research Park North in north Norman. Uses within the University Research Park North include the Cleveland County Family YMCA, American Red Cross Center, National Weather Center, National Storm Prediction Center, National Severe Storms Laboratory, Merrick Computer Center, Well Construction Technology Center, Norman Fire Department Training Center and Fire Station Number 7, City of Norman Public Works Department, the City of Norman Sanitation Services Facility, and the City of Norman Solid Waste Division Office Building which is currently under construction. There has been steady light industrial development taking place in Norman over the past ten years

in several industrial parks including Broce Industrial Park, Northridge Industrial Park, Norman Industrial Tract, and Norman Business Park. Rental rates and vacancy rates for industrial space are at levels which make new construction economically feasible based upon current construction costs. The triangular area to the north of the subject bounded by Goddard Avenue on the northwest and Flood Avenue (U.S. Highway 77) on the northeast is 100% developed with institutional uses (city of Norman's Public Works Department, Sanitation Services Facility, new Solid Waste Division Office Building currently under construction, Norman Fire Department Training Center and Fire Station Number 7, and Natural Gas Vehicle Station). Based upon current market conditions in the area, light industrial uses and institutional uses (such as use by the City of Norman) are considered to be economically feasible at the present time.

Maximally Productive Use:

Of the uses which are physically possible, legally permissible, and financially feasible, the maximally productive use or use which will result in the highest net return to the land is considered to be light industrial use or institutional use (such as use by the City of Norman).

Highest and Best Use "As Vacant Site":

Based upon current market conditions in the area and the location of the property, the highest and best use of the sites "as vacant and available for use today" is light industrial use on institutional use (such as use by the City of Norman)

THE APPRAISAL PROCESS:

In the appraisal of real property, to arrive at an estimate of market value for the subject site being considered, it is the appraisal practice to search, study and assemble as much information as possible pertaining to value that can be collected from the marketplace, and to utilize this information in three separate approaches to an estimate of value. These three approaches are: the Cost Approach, Income Capitalization Approach, and the Sales Comparison Approach.

Cost Approach - A method in which the value of a property is derived by estimating the replacement cost of the improvements, deducting therefrom the estimated depreciation, and then adding the value of the land as estimated by use of the Sales Comparison Approach.

Income Capitalization Approach - An appraisal technique in which the anticipated net income is processed to indicate the capital amount of investment, which produces the net income. The capital amount called the CAPITALIZED VALUE is, in effect, the sum of the anticipated annual rents less the loss in interest until the time of collection. The reliability of this technique is dependent upon four conditions, namely, (a) the reasonableness of the estimate of the anticipated net annual income; (b) the duration of the net annual income, usually the economic life of the building; (c) the capitalization (discount rate); and (d) the method of conversion (income to capital).

Sales Comparison Approach - An appraisal technique in which the market value estimated is predicated upon prices paid in actual market transactions and current listings, the former fixing the lower limit of value in a static or advancing market (price wise), and fixing the higher limit of value in a declining market; and the latter fixing the higher limit in any market. It is a process of correlation and analysis of similar, recently sold properties. The reliability of this technique is dependent upon: (a) degree of comparability of each property with the property under appraisal; (b) the time of the sale; (c) the verification of sales data; and (d) the absence of unusual conditions affixing the sale.

After arriving at an indication of value by the three approaches, these are correlated into a single conclusion of value based on the approach that has the highest quality and quantity of data available, and the one in which the market participant typically has the greatest confidence.

The subject property consists of ±13.3-acre tract of land for which the highest and best use is considered to be light industrial or institutional (such as use by the City of Norman). The subject site is being appraised as if vacant and unimproved with no consideration or value given to any existing improvements on site. The Cost Approach

is not applicable as the subject site is being appraised as if vacant and unimproved and no improvements are involved. The Income Capitalization Approach is not applicable as the property is not an income-producing property. The only applicable approach to value in the valuation of the subject site as if vacant and unimproved is the Sales Comparison Approach.

SALES COMPARISON APPROACH

The Sales Comparison Approach is a method of estimating market value in which a subject property is compared with comparable properties that have been sold recently. Preferably, all properties are in the same geographic area. One premise of the Sales Comparison Approach is that the market will establish a price for the subject property in the same manner that the prices of comparable competitive properties are established.

The sale prices of the properties deemed most comparable to the subject property tend to set the range in which the value of the subject property will fall. Further consideration of the comparative data allows the appraiser to derive a figure representing the value of the appraised property, in keeping with the definition of value sought, as of the effective date of the appraisal.

Essentially, the Sales Comparison Approach is a systematic procedure for comparison. In applying the Sales Comparison Approach, an appraiser:

- 1. Researches the market to obtain information about transactions, listings, and other offerings of properties similar to the subject property.
- 2. Verifies the information through a knowledgeable source, preferably one of the participants in the transaction, by considering whether the data obtained is factually accurate and the transactions reflect arm's length market considerations.
- 3. Determines relevant units of comparison for example, acre, square foot, multiplier, etc. and develops a comparative analysis for each unit.
- 4. Compares the subject property and comparable sales and adjusts the sale price of each comparable appropriately or eliminates the property as a comparable.
- 5. Reconciles the several value indications derived from the comparables into a single value indication.

Estimating the degree of comparability between two properties necessitates a judgment about their similarity. This judgment is based on consideration of elements of comparison - i.e., the characteristics of properties and transactions that cause prices to The elements of comparison are: (1) real property rights financing terms; (3) conditions of conveyed; (2) sale; expenditures made immediately after purchase; (5) market conditions; location; (7)physical characteristics(size, construction quality, condition, etc.); (8) economic characteristics(operating expenses, lease provisions, management, tenant mix, etc.); (9) use(zoning); and (10) non-realty components of value. Adjustments for these elements are made to the price of each comparable property as appropriate.

The subject property consists of a ± 13.3 -acre tract of land for which the highest and best use is considered to be light industrial or institutional (such as municipal uses by the City of Norman). The subject site is being appraised as if vacant and unimproved with no consideration or value given to any existing improvements on site.

Ten sales of comparable unimproved tracts of land with similar highest and best use (light industrial or institutional such as municipal uses by the City of Norman) were analyzed in the valuation of the subject property by the Sales Comparison Approach, summaries of which can be found on the following pages.

COMPARABLE LAND SALE NO. 1:

Location: 712-714-716 Research Park Boulevard

Norman, Oklahoma

Legal Desc.: Lot 35A, Block 3, Norman Research Park, to Norman,

Cleveland County, Oklahoma

Size: 86,859 S.F. or 1.994 acres

Zoning: "I-1" Light Industrial District

Buyer: Equity Commercial Realty, LLC

Seller: T & L Commercial Properties, LLC

Date of Sale: March 8, 2022

Book/Page: 6392/1269

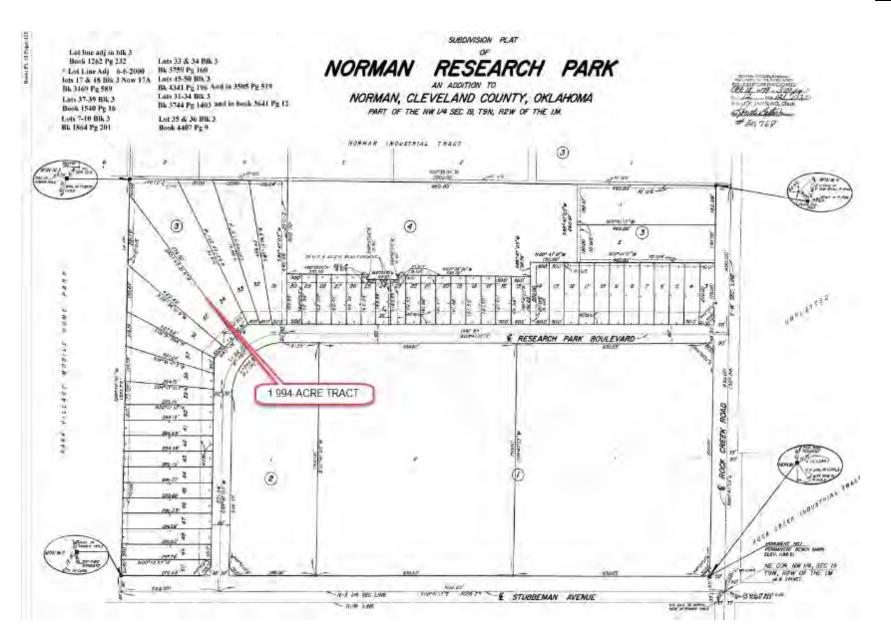
Sale Price: \$400,000 (all cash to seller)

Comments: This was the very recent (March 2022) sale of an

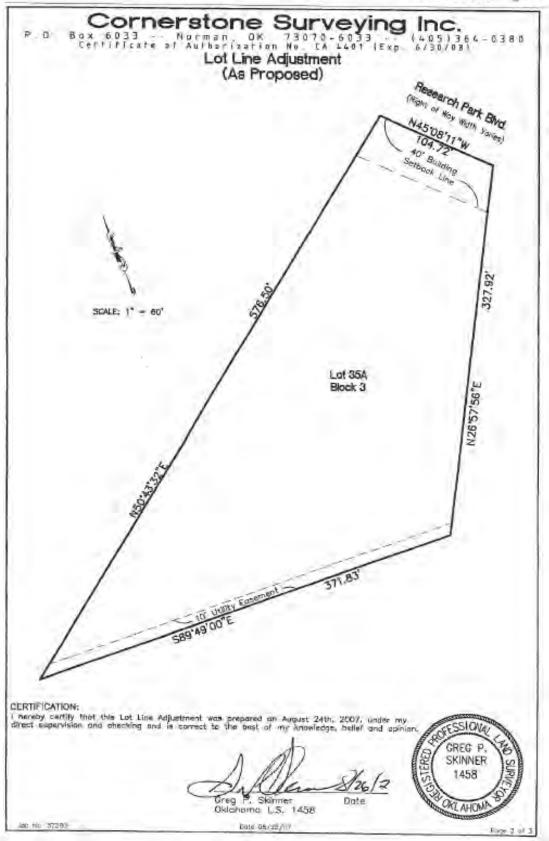
unimproved 1.994-acre industrial tract located on the south side of the 700 block of Research Park Boulevard within an industrial park known as Norman Research Park. This is an irregular shaped level interior site with all city utilities to the site. This tract was purchased for development with three pre-engineered metal industrial buildings which will

be leased.

Unit of Comparison:



Book: RB 4407 Page: 11





COMPARABLE LAND SALE NO. 2:

Location: East side of North Flood Avenue (U.S. Highway 77)

& west side of $24^{\rm th}$ Avenue N.W.

One-half mile south of Franklin Road

Norman, Oklahoma

Legal Desc.: Part of NE/4 Section 11, T9N, R3W, I.M.,

Cleveland County, Oklahoma

Size: 447,718 S.F. or 10.27819 acres

Zoning: "I-1" Light Industrial District

Buyer: Victory Family Church, Inc.

Seller: Bio-Cide International, Inc.

Date of Sale: March 26, 2021

Book/Page: 6213/1232

Sale Price: \$1,650,000 (all cash to seller)

Comments: This was the very recent (March 2021) sale of an

unimproved 10.27819-acre industrial tract located on the west side of North Flood Avenue(U.S. Highway 77) and the east side of 24th Avenue N.W. about one-half mile south of Franklin Road in north Norman. This is an irregular shaped interior tract of land with all city utilities to the site. This tract is located contiguous to the north of two industrial lots platted as Bio-Cide East Park Sections 1 and 2. This tract was preliminary platted as part of an industrial park known as Bio-Cide East Park. This

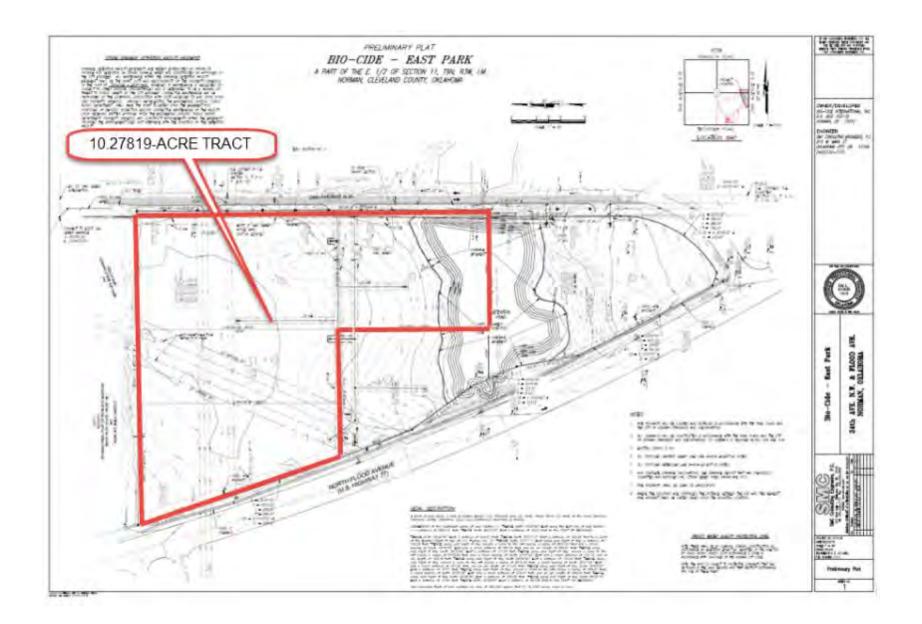
tract is traversed by a 130-foot overhead

transmission line and a 100-foot pipeline easement which reduces the buildable area of the tract. Most of the tract is generally level to gently sloping.

Part of the southeast section of the tract is situated within a drainage easement. This tract was

not platted at the time of sale. This tract was purchased by the church to the north for future use.

Unit of Comparison:





COMPARABLE LAND SALE NO. 3:

Location: 5451 Huettner Drive

Norman, Oklahoma

Legal Desc.: Lot 2, Block 1, Value Place Addition, a Replat of

Lots 1 and 2, Block 1, Huettner Addition Section

Two, to Norman, Cleveland County, Oklahoma

Size: 268,907 S.F. or 6.17326 acres

Zoning: "PUD-1819-5" Planned Unit Development District

Buyer: High Flyer Holdings, Inc.

Seller: Blue Jay Construction, LLC

Date of Sale: September 30, 2020

Book/Page: 6126/138

Sale Price: \$625,000 (all cash to seller)

Comments: This was the September 2020 sale of an unimproved

6.17326-acre industrial tract located on Huettner Drive within an industrial park known as Huettner Addition which is situated along the east side of Interstate 35 about one-quarter mile south of Indian Hills Road in far north Norman. This is an irregular shaped interior site with all city utilities to the site. This tract is generally level and backs up to

the Burlington Northern & Santa Fe Railroad.

Unit of Comparison:



COMPARABLE LAND SALE NO. 4:

Location: Northeast side of 1800 block of Atchison Drive

Norman, Oklahoma

Legal Desc.: Lots 8 & 9, Block 1, Northridge Industrial Park,

to Norman, Cleveland County, Oklahoma

Size: 99,716 S.F. or 2.28916 acres

Zoning: "I-1" Light Industrial District

Buyer: 2 Goodfellas, LLC

Seller: John & Michelle Traw

Date of Sale: August 5, 2020

Book/Page: 6102/218

Sale Price: \$350,000 (all cash to seller)

Comments: This was the August 2020 sale of an unimproved

2.28916-acre industrial tract located on the

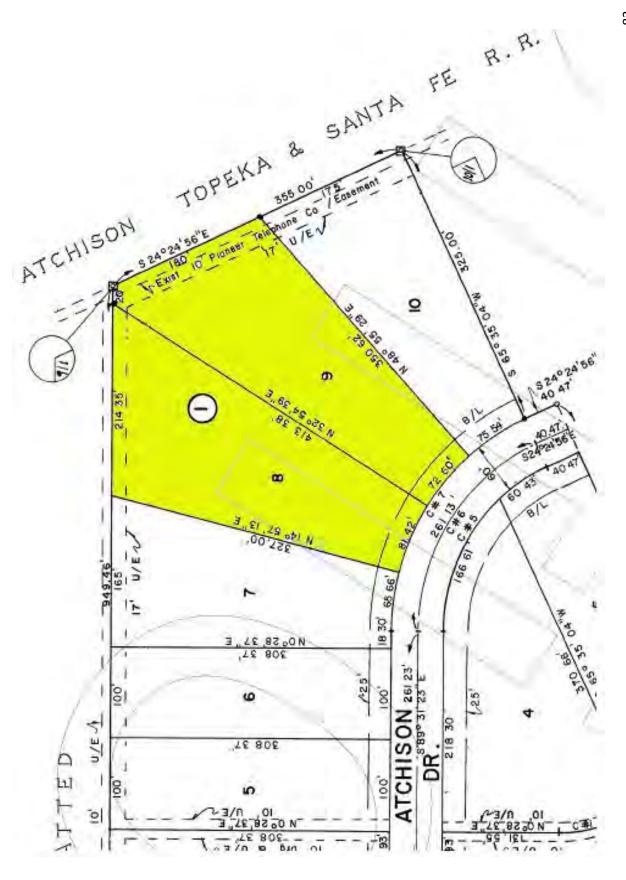
northeast side of the 1800 block of Atchison Drive within Northridge Industrial Park in Norman. This park is situated along the east side of North Flood Avenue (U.S. Highway 77) due south of Tecumseh Road. This is an irregular shaped level interior site with all city utilities to the site. This tract backs up

to the Burlington Northern & Santa Fe Railroad.

Unit of Comparison:



COMPARABLE LAND SALE NO. 4



COMPARABLE LAND SALE NO. 5:

Location: 4200 28th Avenue N.W.

Norman, Oklahoma

Legal Desc.: Lot 1, Block 2, Pepco Industrial Park Phase 1,

to Norman, Cleveland County, Oklahoma

Size: 138,000 S.F. or 3.168 acres

Zoning: "I-1" Light Industrial District

Buyer: Bellwoode, LLC

Seller: WP Land, LLC

Date of Sale: December 31, 2019

Book/Page: 6006/723

Sale Price: \$523,000 (all cash to seller)

Comments: This was the December 2019 sale of an unimproved

3.168-acre industrial tract located on the west side

of 28th Avenue N.W. at Venture Drive in Pepco Industrial Park (aka Northport Business Park) in north Norman. This is an irregular shaped level interior site with all city utilities to the site. This tract backs up to Interstate 35 and has good visibility from the Interstate but no direct access. This tract was purchased for development of three pre-engineered metal industrial buildings available

for lease.

Unit of Comparison:



COMPARABLE LAND SALE NO. 6:

Location: 3901 N. Flood Avenue (U.S. Highway No. 77)

Norman, Oklahoma

(NE corner of Flood Avenue & 24th Avenue N.W.)

Legal Desc.: Lot 1, Block 1, Bio-Cide East Park Section 1, to

Norman, Cleveland County, Oklahoma

Size: 156,046 S.F. or 3.5823 acres

Zoning: "I-1" Light Industrial District

Buyer: Black Mesa Assets, LLC

Seller: Bio-Cide International, Inc.

Date of Sale: January 12, 2018

Book/Page: 5759/1023

Sale Price: \$600,000 (all cash to seller)

Comments: This was the January 2018) sale of an unimproved

3.58232-acre industrial lot located at the northeast corner of North Flood Avenue(aka U.S. Highway 77) and 24th Avenue N.W. platted as Bio-Cide East Park Section 1. This is an irregular shaped corner site with frontage on Flood Avenue along the west and along 24th Avenue N.W. on the east & south. About the north one-third of this tract consists of a drainage easement (detention pond) which is a water quality protection zone (WQPZ). The building pad site on the south half of the site is generally level and to the north of the pad site the site slopes to the north toward the drainage easement(detention pond). A beer brewery facility has since been constructed

on the site.

Unit of Comparison:



STORM DRAINAGE DETENTION FACILITY EASEMENT

DRANGE CETEMION FACULTY EXEMENTS ARE INDIRECT ESTABLISHED AS SHOWN TO PROVIDE FOR CETEMIOR OF STORM SUFFACE WATER AND CONSTRUCTE AS APPROVIDE BY THE CITY CHARGER. ALL MANTICANCE WITHIN THE PRIMARIO DETEMINED FOR THE CONTROLLER. THE REGIST, DUTY AND RESPONSIBILITY OF THE PROPERTY CONNECS ASSOCIATION IN THE PLAT OF INDICEDE. DEST PARK SECTION 1: ROCKMERT, IT MAINTENANCE IS NELECTED OF SUBJECT TO CHIEF UNIQUE, OCCUPANTAL AND IS CITEMINATED. TO BE A WAZER OF THE TOTAL OF PUBLIC STATES OF THE PROPERTY OF THE CITY EXEMPTER. CORRECTIVE WANTENANCE WAY HE PUBLICANCE WHAT OF THE OWNERS ASSOCIATION, OFFICIALS REPRESENTING THE INDIRECTION DISSON. PUBLIC WORKS DEPARTMENT, SHALL HAVE THE ROCK THE UNIVERSE ASSOCIATION, OFFICIALS REPRESENTING THE INDIRECTION DISSON. PUBLIC WORKS DEPARTMENT, SHALL HAVE THE ROCK THE DEPORT OF PROPERTIES WANTED. RIGHT TO SITTER UPON THE DISCIBLINE FOR PURPOSES OF PERIODIC REPERTOR WAS JOINT OF THE DISCIBLINE OF PERIODIC REPERTOR WAS JOINT OF THE DISCIBLINE WRITTEN APPROVED THE CHARLES DEPORTED FOR PROPERTY OWNERS ASSOCIATION WAS CONSTRUCT METODISCIBLINE WITH THE FUNCTION OF THE DISCIBLINE WITH THE FUNCTION OF THE DISCIBLINE FROMED THE METODISCIBLINE WITH THE FUNCTION OF THE DISCIBLINE FORLITY.

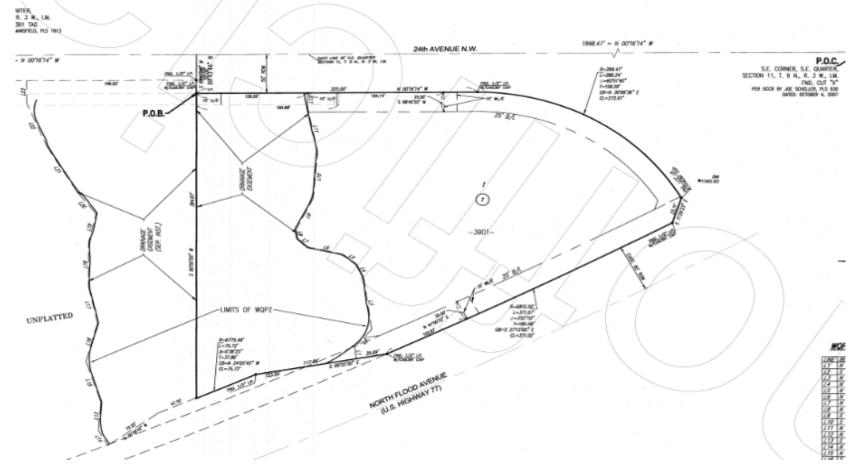
FINAL PLAT

BIO-CIDE - EAST PARK SECTION 1

A PART OF THE S.E. 1/4 OF SECTION 11, T9N, R3W, I.M. NORMAN, CLEVELAND COUNTY, OKLAHOMA

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COMPARABLE LAND SALE NO. 7:

Location: 5740 Huettner Court

Norman, Oklahoma

Legal Desc.: Units 1-4, I-35 Industrial Condominium Association

No. 1, Lot 6, Block 1, Huettner Addition Section 3,

to Norman, Cleveland County, Oklahoma

Size: 101,877 S.F. or 2.33877 acres

Zoning: "I-1" Light Industrial District

Buyer: H Industrial, LLC

Seller: H. Grant Irwin Sr. Revocable Trust

Date of Sale: September 18, 2017

Book/Page: 5721/1095

Sale Price: \$350,000 (all cash to seller)

Comments: This was the September 2017 sale of an unimproved

2.33877-acre industrial tract located on Huettner Court within an industrial park known as Huettner Addition which is situated along the east side of Interstate 35 about one-quarter mile south of Indian Hills Road in far north Norman. This is an irregular shaped interior site with all city utilities to the site. This tract is generally level. This tract has since been improved with a multi-tenant industrial property with four pre-engineered metal buildings.

Unit of Comparison:



COMPARABLE LAND SALE NO. 7

COMPARABLE LAND SALE NO. 8:

Location: East side of North Flood Avenue (U.S. Highway 77)

One-half mile south of Tecumseh Road

Norman, Oklahoma

Legal Desc.: Part of SE/4 Section 13, T9N, R3W, I.M., Cleveland

County, Oklahoma

Size: 180,083 S.F. or 4.13414 acres

Zoning: "I-2" Heavy Industrial District

Buyer: Jaypat 4, LLC

Seller: Hard Edge Design, Inc.

Date of Sale: May 25, 2016

Book/Page: 5553/901

Sale Price: \$700,000 (all cash to seller)

Comments: This was the May 2016 sale of two unimproved tracts

of industrial with a total area of 4.13414 acres located along the east side of North Flood Avenue or U.S. Highway 77 ±one-half mile south of Tecumseh Road in north Norman. This property is situated in an area of industrial land uses along the east side of North Flood Avenue extending from Rock Creek Road to Tecumseh Road. These are two irregular shaped interior tracts with all city utilities available. The tracts are generally level. These tracts were purchased by the owner of the property contiguous to the north for expansion. These two tracts back up to the Burlington Northern & Santa Fe Railroad.

Unit of Comparison:



COMPARABLE LAND SALE NO. 8

COMPARABLE LAND SALE NO. 9:

Location: 7417 S.W. 67th Street and 6801 & 6901 Brooklyn Court

Oklahoma City, Oklahoma

Legal Desc.: Lots 8-10, Block 1, Rockwell Heights Industrial

Park, to Oklahoma City, Oklahoma County, Oklahoma

Size: 660,993 S.F. or 15.17431 acres

Zoning: "I-2" Moderate Industrial District

Buyer: CSI Oklahoma City Investments, LLC

Seller: Jobo, LLC

Date of Sale: March 29, 2022

Book/Page: 15111/259

Sale Price: \$1,884,000 (all cash to seller)

Comments: This was the very recent (March 2022) sale of three

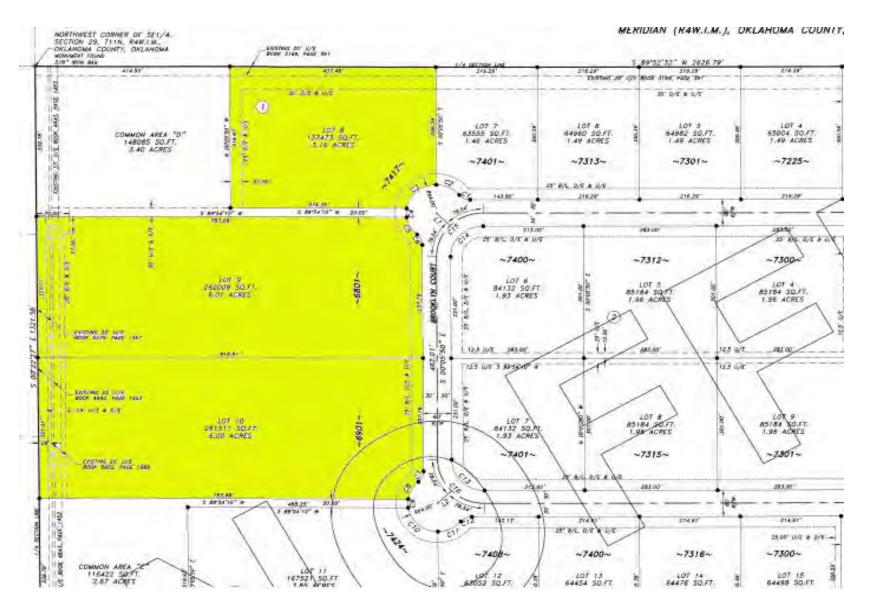
contiguous platted industrial lots with a total area of 15.17431 acres located along S.W. $67^{\rm th}$ Street and Brooklyn Court within Rockwell Heights Industrial Park in southwest Oklahoma City. These are all generally level interior tracts with all city

utilities available.

Unit of Comparison:



COMPARABLE LAND SALE NO. 9



COMPARABLE LAND SALE NO. 9

COMPARABLE LAND SALE NO. 10:

Location: Southeast corner of S.W. 36th Street & Purdue Avenue

Oklahoma City, Oklahoma

Legal Desc.: Part of SW/4 Section 15, T11N, R4W, I.M., Oklahoma

County, Oklahoma

Size: 488,582 S.F. or 11.2163 acres

Zoning: "I-3" Heavy Industrial District

Buyer: IDV Purdue, LLC

Seller: Sealy OKC Airport Land, LLC

Date of Sale: September 8, 2020

Book/Page: 14470/747

Sale Price: \$1,500,000 (all cash to seller)

Comments: This was the September 2020 sale of an unimproved

11.2163-acre industrial tract of land located at the

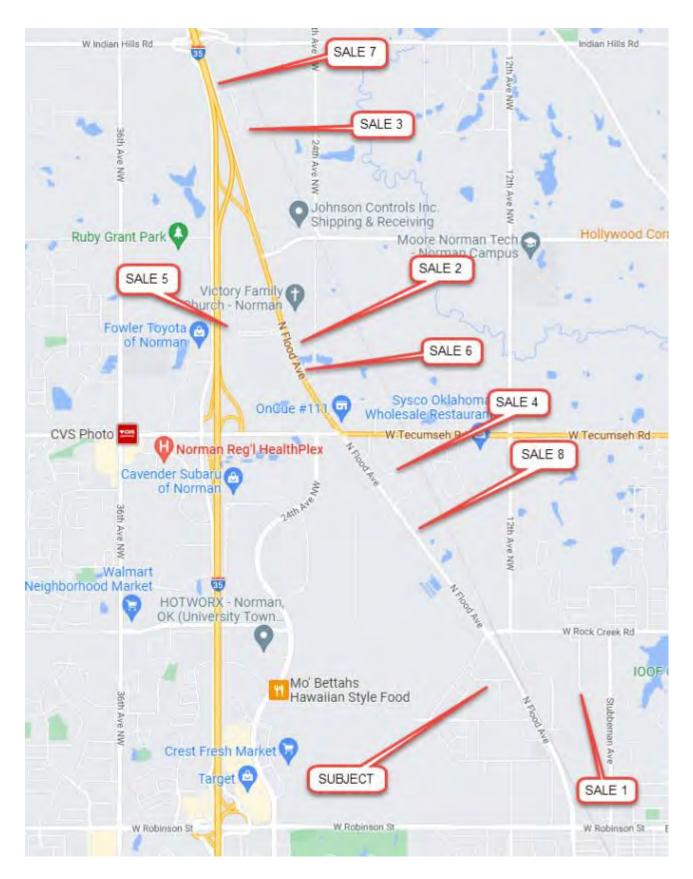
southeast corner of S.W. 36th Street and Purdue Avenue in southwest Oklahoma City. This tract is situated within an area of industrial uses. This is a corner tract which is generally level with all

city utilities to the site.

Unit of Comparison:



COMPARABLE LAND SALE NO. 10



Analysis of Land Sales:

Ten recent sales of comparable unimproved tracts of land with similar highest and best use (industrial) have been analyzed in the valuation of the subject site, a summary of which is as follows:

SUMMARY OF COMPARABLE LAND SALES

SALE	LOCATION	SALE DATE	SALE PRICE	SIZE (AC)	ZONING	PRICE PER S.F.
1	712-714-716 Research Park Blvd. Norman, OK	3-22	\$400,000	1.994	I-1	\$4.61
2	East side N. Flood Ave. & west side $24^{\rm th}$ Ave. N.W. ½ mile south of Franklin Rd. Norman, OK	3-21	\$1,650,000	10.27819	I-1	\$3.69
3	5451 Huettner Drive Norman, OK	9-20	\$625,000	6.17326	PUD	\$2.32
4	NE side of 1800 block of Atchison Drive Norman, OK	8-20	\$350,000	2.28916	I-1	\$3.51
5	4200 28 th Avenue N.W. Norman, OK	12-19	\$523,000	3.168	I-1	\$3.79
6	3901 N. Flood Avenue Norman, OK	1-18	\$600,000	3.58232	I-1	\$3.85
7	5740 Huettner Court Norman, OK	9-17	\$350,000	2.33877	I-1	\$3.44
8	East side N. Flood Avenue ½ mile south of Tecumseh Rd. Norman, OK	5-16	\$700,000	4.13414	I-2	\$3.89
9	7417 S.W. 67 th Street 6801 & 6901 Brooklyn Court Oklahoma City, OK	3-22	\$1,884,000	15.17431	I-2	\$2.85
10	SE corner S.W. 36 th Street & Purdue Avenue Oklahoma City, OK	9-20	\$1,500,000	11.2163	I-3	\$3.07

Sales 1-8 are all tracts of land zoned for industrial use located in Norman. Sales 9 and 10 are two additional sales of similar tracts of land zoned for industrial use located in southwest Oklahoma City, a similar market area.

The appraiser has made a qualitative comparative analysis of the comparable sales which involved the comparison of each sale to the subject property with an analysis of any property differences having a significant effect upon market value. The principal areas of dissimilarities include buyer and seller motivation (conditions of sale), market conditions (time of sale), location, size, shape, frontage, accessibility, visibility, availability of city utilities, easements, zoning, highest and best use, and topography.

The subject tract is an irregular shaped tract of land with an area of ±13.3 acres which is located contiguous to the south of the City of Norman Public Works Department within the University of Oklahoma Research Park North. The subject site has frontage on Goddard Avenue, Pasteur Avenue, and Priestly Avenue.

Sales 2, 3, 9, and 10, which range in size from 6.17326 to 15.17431 acres and indicated unadjusted prices per square foot of \$3.69, \$2.32, \$2.85, and \$3.07, are most similar in size to the subject

(which has an area of 13.3 acres). The unadjusted mean or average price per square foot indicated by these four sales is \$2.98/S.F. Sales 1 and 4-8 are all much smaller tracts which would tend to sell for higher prices per square foot than would a larger tract similar in size to the subject. Sales 1 and 4-8 range in size from 1.994 to 4.13414 acres. The unadjusted mean or average price per square foot indicated by these six sales is \$3.85/S.F.

Sale 1, which indicated an unadjusted price per square foot of \$4.61, was the very recent (March 2022) sale of a much smaller platted industrial tract located within an industrial park known as Norman Research Park in north Norman. As a much smaller tract, Sale 1 would tend to sell for a higher price per square foot than would a larger tract such as the subject. After adjusting for much smaller size, Sale 1 would support a value for the subject lower than \$4.61/S.F. Sale 2, which indicated an unadjusted price per square foot of \$3.69, was the recent (March 2021) sale of a similar sized industrial tract (10.27819 acres) located on North Flood Avenue (U.S. Highway 77) in Sale 2 was preliminary platted as part of an north Norman. industrial park at the time of sale. Sale 2 is superior in location and visibility to the subject with frontage on a major arterial fourlane thoroughfare. After adjustment for superior location and visibility, Sale 2 would support a value for the subject site lower

than \$3.69/S.F. Sale 3, which indicated an unadjusted price per square foot of \$2.32, was the September 2020) sale of a 6.17326-acre platted industrial tract located within an industrial park known as Huettner Addition in north Norman. Sale 3 sold two years ago and would require some positive adjustment for increase in value since the date of sale as land values have been gradually increasing in the area in recent years. After adjusting for date of sale, Sale 3 would support a value for the subject higher than \$2.32/S.F. 4, which indicated an unadjusted price per square foot of \$3.51, was the August 2020 sale of a much smaller platted industrial tract located within an industrial park known as Northridge Industrial Park in north Norman. Sale 4 sold two years ago and would require some positive adjustment for increase in value since the date of sale as land values have been gradually increasing in the area in recent years. As a much smaller tract, Sale 4 would tend to sell for a higher price per square foot than would a larger tract such as the subject. After adjusting for date of sale and much smaller size, Sale 4 would support a value for the subject lower than \$3.51/S.F. Sale 5, which indicated an unadjusted price per square foot of \$3.79, was the December 2019 sale of a much smaller platted industrial tract located within an industrial park known as Northridge Industrial Park in north Norman. Sale 5 sold three years ago and would require some positive adjustment for increase in value since the date of sale as land values have been gradually increasing in the area in recent years. As a much smaller tract, Sale 5 would tend to sell for a higher price per square foot than would a larger tract such as the subject. Sale 5 backs up to Interstate 35 and is superior in location and visibility to the subject. After adjusting for date of sale, smaller size, and superior location/visibility, Sale 5 would support a value for the subject lower than \$3.79/S.F. Sale 6, which indicated an unadjusted price per square foot of \$3.85, was the January 2018 sale of a much smaller platted industrial tract located on North Flood Avenue (U.S. Highway 77) in north Norman. Sale 6 sold about five years ago and would require some positive adjustment for increase in value since the date of sale as land values have been gradually increasing in the area in recent years. As a smaller tract, Sale 6 would tend to sell for a higher price per square foot than would a larger tract such as the subject. Sale 6 is superior in location and visibility to the subject with frontage on a major arterial four-lane thoroughfare. After adjusting for date of sale, smaller size, and superior location/visibility, Sale 6 would support a value for the subject lower than \$3.85/S.F. Sale 7, which indicated an unadjusted price per square foot of \$3.44, was the September 2017 sale of a smaller platted industrial tract located in an industrial park (Huettner Addition) in north Norman. Sale 7 sold about five years ago and would require some positive adjustment for

increase in value since the date of sale as land values have been gradually increasing in the area in recent years. As a smaller tract, Sale 7 would tend to sell for a higher price per square foot than would a larger tract such as the subject. After adjusting for date of sale and smaller size, Sale 7 would support a value for the subject lower than \$3.44/S.F. Sale 8, which indicated an unadjusted price per square foot of \$3.89, was the May 2016 sale of a smaller industrial property (two tracts) located in an area of industrial uses on North Flood Avenue (U.S. Highway 77) in north Norman. 8 sold about six years ago and would require some positive adjustment for increase in value since the date of sale as land values have been gradually increasing in the area in recent years. As a smaller tract, Sale 8 would tend to sell for a higher price per square foot than would a larger tract such as the subject. Sale 8 is superior in location and visibility to the subject with frontage on a major arterial four-lane thoroughfare. After adjusting for date of sale, smaller size, and superior location/visibility, Sale 8 would support a value for the subject lower than \$3.89/S.F. Sale 9, which indicated an unadjusted price per square foot of \$2.85, was the very recent (March 2022) sale of a similar sized industrial property (consisting of three platted industrial lots) located industrial park in southwest Oklahoma City. Sale 9 is highly similar to the subject and would support a value for the subject similar to

\$2.85/S.F. Sale 10, which indicated an unadjusted price per square foot of \$3.07, was the September 2020 sale of a similar sized industrial tract located in an industrial area in southwest Oklahoma City. Sale 10 is highly similar to the subject and would support a value for the subject similar to \$3.07/S.F.

Conclusion:

Based upon the foregoing analysis of the most recent sales of comparable unimproved tracts of land with similar highest and best use (light industrial) in the general market area, a value of \$3.00 per square foot is considered to be a reasonable and supportable estimate of value for the subject property as if vacant and unimproved.

Valuation:

13.3 acres \times 43,560 S.F./Acre @ \$3.00/S.F. = \$1,738,044

Indicated Value of Subject Site
As if Vacant & Unimproved
By Sales Comparison Approach

Rounded to \$1,738,000

ESTIMATED MARKETING TIME:

Marketing time is defined as follows: "The time it takes an interest in real estate to sell on the market subsequent to the date of an appraisal. Reasonable marketing time is an estimate of the amount of time it might take to sell an interest in real property at its estimated market value during the period immediately after the effective date of the appraisal; the anticipated time required to expose the property to a pool of prospective purchasers and to allow appropriate time for negotiation, the exercise of due diligence, and the consummation of a sale at a price supportable by concurrent market conditions." (The Dictionary of Real Estate Appraisal, Fourth Edition, 2002, Appraisal Institute)

For this analysis, one assumes a normal marketing time with an aggressive and professional marketing program. Based on the marketing time for comparable unimproved tracts of land with similar highest and best use (light industrial) in the Norman and greater Oklahoma City metropolitan area along with discussions with commercial brokers in the area, it is the appraiser's opinion that a sale of the appraised property could be achieved within approximately six to twelve months or less. This six to twelve month marketing period assumes the property would be professionally and

aggressively marketed at the final estimate of value indicated in this report assuming continued similar market conditions.

RECONCILIATION AND FINAL VALUE CONCLUSION:

Reconciliation is the function in the valuation process in which an appraiser analyzes alternative conclusions and selects a final value estimate from among two or more indications of value. A thorough review of the entire valuation process may precede reconciliation. Reconciliation is the part of the valuation process in which an appraiser most directly draws upon his experience, expertise, and professional judgment to resolve differences among the value indications derived from the application of approaches. The appraiser weighs the relative significance, applicability, and defensibility of each value indication and relies most heavily on the one most appropriate to the purpose of the appraisal. The conclusion drawn is based on the appropriateness, the accuracy, and the quantity of the evidence in the entire appraisal.

Following is a summary of the value indications by the applicable approaches to value:

COST APPROACH NOT APPLICABLE

INCOME CAPITALIZATION APPROACH NOT APPLICABLE

SALES COMPARISON APPROACH \$1,738,000

The Sales Comparison Approach has been utilized to estimate the value of the subject site as if vacant and unimproved and is considered to

be the only applicable approach to value. The Cost Approach was not applicable as there are no improvements being valued. The Income Capitalization Approach was not applicable in the valuation of the subject property either as the property is not an income-producing property.

The Sales Comparison Approach was based on ten recent sales of comparable unimproved tracts of land with similar highest and best use in the subject area. These ten sales are considered to be the most comparable sales of unimproved tracts of land with similar highest and best use which have sold in recent years in the Norman and greater Oklahoma City metropolitan area. Based upon the quantity and quality of available comparable sales data, the value indication by the Sales Comparison Approach is considered to be reliable.

Based upon this appraisal, it is the appraiser's opinion that the market value of the subject property as if vacant and unimproved as of December 19, 2022 is:

MARKET VALUE OF SUBJECT PROPERTY AS IF VACANT & UNIMPROVED

ONE MILLION SEVEN HUNDRED THIRTY-EIGHT THOUSAND DOLLARS (\$1,738,000.00)

APPRAISER'S CERTIFICATION

The undersigned does hereby certify that, except as otherwise noted in this appraisal report:

I have no present or contemplated future interest in the real estate that is the subject of this appraisal report.

I have no personal interest or bias with respect to the subject matter of this appraisal report or to the parties involved with this assignment.

To the best of my knowledge and belief, the statements of fact contained in this appraisal report, upon which analyses, opinions, and conclusions expressed herein are based, are true and correct.

This appraisal report sets forth all of the limiting conditions (imposed by the terms of my assignment or by the undersigned) affecting the analyses, opinions, and conclusions contained in this report.

This appraisal report has been made in conformity with, and is subject to, the requirements of the Uniform Standards of Professional Appraisal Practice promulgated by the Appraisal Standards Board of the Appraisal Foundation.

No one, other than the undersigned, prepared the analyses, conclusions, and opinions concerning the real estate that are set forth in this appraisal report.

The appraiser certifies that the compensation for this appraisal is not contingent upon the reporting of a predetermined value or directed value that favors the cause of the client, the amount of the value estimate, the attainment of a stipulated result or the occurrence of a subsequent event.

I have made a personal inspection of the property that is the subject of this report.

This appraisal assignment was not based on a requested minimum valuation, a specific valuation, or the approval of a loan.

I am certified by the State of Oklahoma as a Certified General Real Estate Appraiser, Certified General Appraiser No. 10289CGA, through December 31, 2024.

I certify that I have not previously provided any services relative to the subject property within the past three years and that the client was advised of the same prior to engagement.

Date: December 23, 2022

Jim R. Artman

Jen R. artma

Certified General Appraiser No. 10289CGA

QUALIFICATIONS OF APPRAISER

James (Jim) R. Artman ARTMAN APPRAISAL COMPANY 4612 Foxborough Court Norman, Oklahoma 73072

EXPERIENCE:

Oct., 1978 -

Present General real estate appraisal practice as owner of Artman Appraisal Company

in Norman, Oklahoma. Primary area of assignments is Norman, Cleveland

County, Moore, McClain County, and Oklahoma City metropolitan area.

March, 1978 -

Sept., 1978 Vice President, Savings Investment Service Corporation.

April, 1977 -

Feb., 1978 Associate Appraiser, Oklahoma Appraisal Company, Inc.

Jan., 1977 - Regional Appraisal Manager, Sooner Federal Savings and Loan

March, 1977 Association.

June, 1973 -

Dec., 1976 Staff Appraiser, Sooner Federal Savings and Loan Association.

GENERAL EDUCATION:

Bachelor of Sciences (Mathematics major, Economics minor). Conferred by University of Oklahoma, May,1972.

Successful completion of 21 credit hours toward M.B.A. degree, University of Oklahoma.

REAL ESTATE APPRAISAL EDUCATION:

Successful completion of Course I-A and examination, American Institute of Real Estate Appraisers, May, 1974. (79 hours credit)

Successful completion of Course I-B and examination, American Institute of Real Estate Appraisers, May, 1975. (76 hours credit)

Successful completion of Course II and examination, American Institute of Real Estate Appraisers, March, 1976. (79 hours credit)

Successful completion of Narrative Residential Case Study Examination and Narrative Report Writing Seminar, Course #102 "Applied Residential Property Valuation," Society of Real Estate Appraisers, December, 1976. (39 hours credit)

QUALIFICATIONS OF APPRAISER (Jim R. Artman) Page 2

REAL ESTATE APPRAISAL EDUCATION: (Cont'd.)

Successful completion of Course VI and examination, American Institute of Real Estate Appraisers, February, 1977. (39 hours credit)

Successful completion of Standards of Professional Practice (Part A) and examination, The Appraisal Institute, July, 1991 (16 hours credit)

Successful completion of Standards of Professional Practice (Part B) -Course #420 and examination, The Appraisal Institute, August, 1994 (11 hours credit).

Educational seminars and courses in real estate appraisal are continuously attended in compliance with continuing education requirements by the Oklahoma Real Estate Appraisal Board(current requirement is 42 hours every three years). A complete list of appraisal courses recently completed is available to the client upon request.

PROFESSIONAL MEMBERSHIPS & AFFILIATIONS:

Former Board Member, Oklahoma Real Estate Appraiser Board (July 2, 2013 through July 1, 2018)

Member, Standards and Disciplinary Procedures Committee Oklahoma Real Estate Appraiser Board

Member, Probable Cause Committee Oklahoma Real Estate Appraiser Board

Member, Real Estate Appraisal Data, Inc.

Appraiser attends regular meetings of Oklahoma Great Plains Chapter of the Appraisal Institute.

STATE CERTIFICATION:

Certified General Appraiser No. 10289CGA State of Oklahoma (Certified through December 31, 2024)

State of Oklahoma



Glen Mulready, Insurance Commissioner

Oklahoma Real Estate Appraiser Board

This is to certify that:

James Artman

has complied with the provisions of the Oklahoma Real Estate Appraisers Act to transact business as a **State Certified General** Real Estate Appraiser in the State of Oklahoma.

In Witness Whereof, I have hereunto set my hand and caused the seal of my office to be affixed at the City of Oklahoma City, State of Oklahoma, this 21st day of December, 2021.



Glen Mulready, Insurance Commissioner Chairperson, Oklahoma Real Estate Appraiser Board

Members, Oklahoma Real Estate Appraiser Board

Brandon Witt

Expirer:

12/31/2024

Oklahoma Appraiser Number:

10289CGA





DEPARTMENTAL REDUNDANCIES

DEPARTMENTAL REDUNDANCIES

Addressing redundancies in building infrastructure, vehicular ingress / egress and efficient staff organization have been identified as key components for success of the current and expanded North Base property global master plan.





Building Infrastructure

During assessment of City of Norman Public Works sites and associated infrastructure, it was apparent that building space allocated for specific staff operation was inefficiently present at multiple building sites. Each function is required for staff operations, but the space created was only utilized a small portion of the overall day to day operations. Further review and evaluation of the various functions creates an opportunity for shared space and a higher utilization of the specific operation. Spaces include but are not limited to the following:

- 1. Staff Break Areas
- 2. Staff Toilet, Lockers and Showers.
- 3. Staff Meeting space
- 4. Support functions (Mail, Copy, Supplies)
- 5. Full Service Welding
- 6. Air Compressor space
- 7. Parts Distribution

One persistent component of each site was the lack of dedicated and managed storage space. For this reason, each department is carving storage space from other required functional areas. The inefficiency created affects both the operations and access to stored materials. This component of the facility assessment will be greatly improved by a purposefully managed and dedicated storage warehouse.

The storage component for different departments is impacted both by available space and by environmental impacts, as follows:

Available space: Due to limited space available for storage of materials, some locations are creatively carving space to address storage needs. This space includes but is not limited to the open areas located within public toilet rooms.

Environmental impacts: In addition to lack of space, during inclement and freezing conditions, vehicles both at Lindsey yard and on North Base must be brought into working bays to protect equipment from damage during extreme temperatures. When this occurs, normal operations cannot continue within these spaces. Additionally – there is a cost associated with multiple relocations and efforts to perform these tasks. These inefficiencies are being considered in the overall Master Planning Effort.

Redundant spaces are specifically allocated on the property in a manner that is efficient both with respect to building construction and availability for staff use. Reduction in building square footage and the associated construction costs will be an impactful component in the economic viability of the overall Master Plan.

Vehicle Ingress / Egress

Current evaluation of the various City of Norman Public Works sites reveals inefficiencies and conflicts in the routing of vehicles on City property. Some aspects of this inefficiency is as follows:

- 1. Conflict between vehicular and pedestrian access patterns.
- 2. Conflict between large city vehicles / equipment and smaller personal vehicles.
- 3. On site routing / staging of vehicles / equipment during specific events (emergency debris cleanup / Salt Collection and Distribution)
- 4. Vehicle drop off conflicting with maintenance operations and efficiency
- 5. Vehicle ingress and egress from both Flood and Goddard.
- 6. Vehicle staging for CNG Slow Fueling

Purposeful planning of specific site elements, staff and equipment parking lots and site wide vehicle pathing will address and improve the identified current conditions.

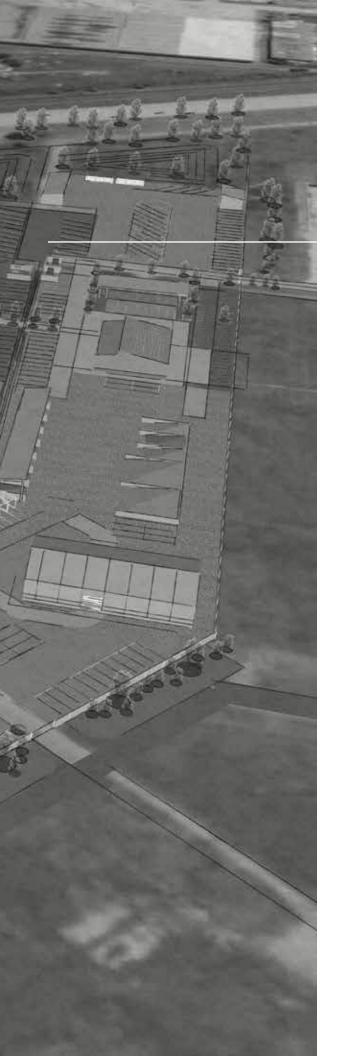


City Staffing

The key factor in addressing current redundancies in City staffing is to maintain the current number of employees. There is no intent for a reduction of the current personnel. Considering both the value of trained staff members and the projected growth in each department validates this approach. The intent of the Master Plan is to develop methods by which staff can move laterally within and between departments to develop an efficient and cost-effective staffing matrix. Final staff allocation and the method by which departments improve and share in efficiencies will be developed in consultation with City Management.

Evaluation of the economic impact of redundant infrastructure and personnel is critical in creating the pro forma for the North Base property. Cost savings directly relating to reduction in redundant spaces and/or personnel will offset the costs of master plan implementation. Identifying and documenting the economics of the plan will illicit and encourage support for addressing the future project goals and directives.





APPENDICES





A.1 EQUIPMENT MASTER LIST

ty of Norman Fleet Management 3114.rpt

EQUIPMENT MASTER LIST BY DEPARTMENT

PAGE: 1
DATE: 01/20/2022 10:49

							1	METER	ACQ
EQUIPMENT	EQ DESCRIPTION	SERIAL NUMBER	LICENSE	EMPLOYEE	DEPT	CLASS	TYPE	READING	DATE
DEPARTMENT: 10	550170 - PW FLEET ADMINISTRATION								
0070	2019 CHEVY TAHOE	1GNLCDECXKR316056	CI38933		10550170	CA42U1AZZ3	М	6,185	04/09/2019
Distinct Count of E	quipment: 1								
DEPARTMENT: 10	550171 - PW FLEET LIGHT SHOP								
0073	2021 Karcher Floor Cleaner	N/A	N/A		10550171	YZZZZZAZZ4	N	0	
0074	2019 John Deere Z960M ZTRACK	1TC960MCLKT070893	N/A		10550171	KK11UKAZ14	Н	107	08/05/2019
0075	2005 FORD F250	1FTSX20P95EC71906	CI14993	075C	10550171	BB31U2AZZ3	М	87,292	04/26/2005
0076	2017 PRESSURE WASHER HEG-3005-0E9G	15096552	N/A		10550171	STW1UZAZM4	N	1	05/17/2017
0079	2011 E-Z GO TXTPDS GOLFCART	2678649	N/A		10550171	UE30EKAZZ4	N	1	11/11/2011
0090	2009 SECURITY N/B SECURITY	U10310249536****32	N/A		10550171	YY60EZAZZ4	N	1	10/09/2002
075a	2018 CHAMPION AIR-COMP.	20237957	N/A		10550171	SSA4UZAZZ4	N	1	09/11/2018
084c	2014 INGERSOL2340L5X AIR-COMP.	CBV242715	N/A		10550171	SSA4UZAZZ4	N	1	10/09/2014
21071	2021 Crown Forklift	10295045	N/A		10550171	GJ35EKA2K4	Н	16	10/29/2021
5071	2017 SMALL CANS BULK	FUEL	N/A		10550171	TY50UZZZZA	N	0	
84CR	2014 AUTO CRANE 3203PRX	3203PRX-1014-554	N/A		10550171	PG35ZZAZZ4	N	1	02/04/2014
ALIGNER01	2018 HUNTER Hawkeye Elite	SEE NOTES	N/A		10550171	YZZZZZAZZ4	N	0	10/05/2018
BLNCR02	2018 HUNTER HAMMERHEAD SW12	ICC3299	N/A		10550171	YZZZZZAZZ4	N	0	10/05/2018
LIFT6	2016 PKS PK-70-4-40E LFT	23106	N/A		10550171	YY10EZAZJ4	N	1	09/29/2017
MP5055	2006 CHEVY 1500 P/U	1GCEC14T26Z124427	CI14878		10550171	BB20U1AZZ3	М	199,456	08/26/2005
MP5078	2016 FORD EXPLORER	1FM5K8D88GGB36906	CI24160		10550171	CA32U26ZZ3	М	22,310	03/09/2016
mp5207	2008 CHEVY 2500 P/U	1GCHK24K38E142751	CI15095	5207F	10550171	BB40U2AZZ3	М	82,742	11/02/2007
MP5942	2006 CHEVY 1500 P/U	1GCEK19T76E112793	CI14872		10550171	BB20U11ZZ3	М	103,151	09/07/2005
MP5943	2011 FORD RANGER	1FTKR1ED6BPA60018	CI17755		10550171	BB20U1AZZ3	М	98,760	06/01/2011
TRMCHN02	2018 HUNTER TCX57	0-11455102/00A-16	N/A		10550171	YZZZZZAZZ4	N	0	10/05/2018
Distinct Count of E	quipment: 20								
DEPARTMENT: 10	550172 - PW FLEET HEAVY SHOP								
0077	2014 KENWORTH T440 Fld Truck	1NKBH27X1EJ390655	CI22722	77C,77G,77CR	10550172	5580C7AZZ3	Н	2,158	10/03/2013
0080	2004 IHC ROLLWRECKER 4300 4X2	1HTMMAAM54H667105	CI14995		10550172	75E2D6AZZ3	Н	5,100	02/03/2004
073A	2017 INDUSTRIAL GOLD CI2023E240H-P-2	060618-1387	N/A		10550172	SSA2ZZAZM4	Н	2	11/20/2017
077c	2011 INGERSOL2340L5X AIRCOMP/WELDE	CBV145035	N/A		10550172	SSA1UZAZM4	N	1	12/09/2011
077g	2013 SPEED AIR COMPRESSOR	06 13 20163900	N/A		10550172	SSA1UZAZM4	N	1	07/15/2013
079T	2015 MILLER WELDER	MD161204R	N/A	WELDER & TRAILE	10550172	RR01UZDZZ4	N	1	05/01/2015

City of Norman Fleet Management 3114.rpt

EQUIPMENT MASTER LIST BY DEPARTMENT

PAGE: 2 DATE: 01/20/2022 10:49

							N	METER	ACQ
EQUIPMENT	EQ DESCRIPTION	SERIAL NUMBER	LICENSE	EMPLOYEE	DEPT	CLASS	TYPE	READING	DATE
•									_
DEPARTMENT: 105	550172 - PW FLEET HEAVY SHOP								
77CD	2014 Chald 22001 BV	0.41.22.000	N1 / A		10550172	0005774770	N.	4	10/02/2012
77CR	2014 Stahl 3200LRX	04132008	N/A		10550172	PG35ZZAZZ3	N		10/03/2013
89smal	2014 SMALL CANS BULK	FUEL	N/A		10550172	TY50UZZZZA	N		01/01/1994
FUEL1	2010 GAS BOY FUEL DISPENSER	SEE NOTES SCREEN	N/A		10550172	YY50DZAZQ4	N		12/31/2011
MP5001	2005 TORO 580D	30582-250000281	N/A		10550172	KK11DKAZ14	Н	4,482	07/29/2005
Distinct Count of Ed	quipment: 10								
DEPARTMENT: 105	550210 - PW ENGINEERING								
0053	2013 CHEVY 1500 P/U	1GCRCPE05DZ212961	CI22696		10550210	BB20B1AZZ3	М	42,773	01/01/2013
0054	2016 FORD F150	1FTEW1EFXGKD96671	CI24178		10550210	BB20B2AZZ3	М	•	08/10/2016
0055	2017 FORD F150	1FTEX1EF8HKC07854	CI30038		10550210	BB20B2AZZ3	М	•	10/26/2016
0056	2018 FORD F150	1FTFX1E55JKD23529	CI37509		10550210	BB20B2AZZ3	М		03/26/2018
0057	2013 FORD F150	1FTFX1EF6DKG34934	CI22727		10550210	BB20B2AZZ3	М	•	12/11/2013
0058	2014 FORD F150	1FTEX1CM2EKD94764	CI24428		10550210	BB20C2AZZ3	M	•	08/01/2014
0059	2010 CHEVY COLORADO	1GCKTBD95A8131769	CI15484		10550210	BB20U1AZZ3	М		03/25/2010
Distinct Count of Ed	quipment: 7								
DEPARTMENT: 105	550221 - PW STREETS								
0100	2021 Peterbilt 348 DUMP TRUCK	2NP3LJ0X1MM757675	CI41610		10550221	2625D8AZZ3	Н	420	04/20/2021
0102	1999 IHC 4700 DUMP TRUCK	1HTSCAAN4XH608327	CI14882		10550221	2625D8AZZ3	М	50,981	08/28/1998
0103	2016 FORD F250	1FT7W2B61GEB54949	CI24091		10550221	BB31U2AZZ3	М	37,406	01/18/2016
0107	2008 CATERPILLAR 938G	CAT0938GCRTB03736	N/A		10550221	GG51DMAZ94	Н	5,568	04/22/2008
0108	2000 Bartel Wacky Packer	55534	N/A		10550221	GGC0UZAZZ4	N	1	
0109	2012 EDCO RENTAL TOUGH	120810042	N/A		10550221	KK87UZAZZ4	Н	1	08/15/2012
0110	2014 Peterbilt 348 DUMP TRUCK	2NP3LJ9X4EM244652	CI22737	0110P	10550221	2625D8AZZ3	Н	4,736	04/01/2014
0111	2014 John Deere 323E SKID STEER	1T0323EMADJ252890	N/A		10550221	GG70DMAZK4	Н		01/01/2014
0113	2011 John Deere 333D Skid Steer	1T0333DMABD208964	N/A		10550221	GG70DMAZK4	Н	1,225	10/07/2011
0115	2017 John Deere 331G TRACK LOAD	1T0331GMTHF317736	N/A	115H,115R	10550221	GG5ADMAZK4	Н	474	09/22/2017
0119	2017 John Deere GRADER	1DW672GXKHF680311	N/A	0119	10550221	GGF0DNAZZ4	Н		05/01/2017
0120	1999 IHC 4700 OIL DIST T	1HTSCAANOXH676267	, CI14890		10550221	3305D7AZZ3	М		01/21/1999
0123	1997 IHC 4700 TOOL TRUCK	1HTSCAAN3VH449894	CI14893	123CR,123F,123G	10550221	5401D7AZZ3	М	•	11/19/1996
0124	2016 FORD F250	1FT7W2B64GEA90406	CI24099	, -, -	10550221	BB31U2AZZ3	М	•	02/01/2016
0126	2013 CATERPILLAR CW14 COMPACTOR	CATOCW14CLTJ00125	N/A		10550221	GGC0DLAZZ4	Н		08/17/2013
0127	2013 CATERPILLAR 95	CAT0924KCPWR01697	N/A		10550221	GG51DMAZ94	Н	•	07/12/2013
		303201 111101037	,			3332D11112JT	•••	1,027	,,,,,,,,,,

City of Norman Fleet Management 3114.rpt

EQUIPMENT MASTER LIST BY DEPARTMENT

DATE: 01/20/2022 10:49

Department								I	METER	ACQ
195 195		EQ DESCRIPTION	SERIAL NUMBER	LICENSE	EMPLOYEE	DEPT	CLASS	TYPE	READING	DATE
1995 GRIMMER SC AIR-COMP. 199-18555 N/A 10550221										
1912 2011 HARBEN 4018DFLUSH-TRAI	1055	50221 - PW STREETS								
2014 CATERPILLAR ROLLER		1995 GRIMMER SC AIR-COMP.	195-18555	N/A		10550221	SSA4DZAZN4	Н	577	07/21/1995
2013 2009 INGERSOLL SX-170H		2001 HARBEN 4018DFLUSH-TRAI	1H9T192011C122001	CI14892		10550221	FS44DZAZZ3	Н	1	03/09/2001
1996 CHAMPION C70A RD GRADER 200599 N/A 10550221 GGFODMAZZ4 H 10150 2006 BROCE RJ 350 404927 N/A 10550221 32100ZAZZ3 H 10150 2016 CATERPILLAR C34B CATCC34BTCC300106 N/A 10550221 GGIODLAZZ4 H 10150 2016 CATERPILLAR AP1055F CATAPIOSVTJ501250 N/A 10550221 GGIODLAZZ4 H 10150 2017 GRADALL Excavator 410000793 N/A 10550221 GGIDLAZZ4 H 10150 2017 GRADALL Excavator 410000793 N/A 10550221 GGIDLAZZ4 H 10150 2017 GRADALL Excavator 410000793 N/A 10550221 GGIDLAZZ4 H 10150 2017 John Deere 310SK backhoe 170310SKJEEZ70591 N/A 10550221 GGIDLAZZ4 H 10150 2017 John Deere 310SK backhoe 170310SKJEEZ70591 N/A 144P 10550221 GGIDLAZZ4 H 10150 2016 GATEPILLAR GAGE BOLLER CATCB668 B668 B60LER CATCB668 B		2014 CATERPILLAR ROLLER	CATCC34BE32400130	N/A		10550221	GGJODLAZZ4	Н	32	02/10/2015
2015 2006 BROCE RJ 350		2009 INGERSOLL SX-170H	VK0477/1232435 S	N/A		10550221	SSA4UZAZZ4	Н	14	09/04/2009
2016 CATERPILLAR CC34B		1996 CHAMPION C70A RD GRADER	200599	N/A		10550221	GGFODMAZZ4	Н	1,726	08/28/1996
2011 CATERPILLAR AP105FF CATAP105VTJ501250 N/A 10550221 GGHOD8AZZ4 H 10500979 N/A 10550221 GG92D8AZ93 H 10500079 N/A 10550221 GG92D8AZ93 H 1050040 2009 John Deere 310SK backhoe 1703105K1EE270591 N/A 10550221 GG11DLAZZ4 H 105042 2014 John Deere 310SK BACK HOE 1703105KAEE267291 N/A 10550221 GG11DLAZZ4 H 105043 2014 John Deere GRADER 1703105KAEE267291 N/A 10550221 GG11DLAZZ4 H 105403 2014 John Deere GRADER 1703105KAEE267291 N/A 10550221 GG10DLAZZ4 H 105403 2014 John Deere GRADER 1703105KAEE267291 N/A 10550221 GG10DLAZZ4 H 105403 2014 John Deere GRADER 1703105KAEE267291 N/A 10550221 GG10DLAZZ4 H 105403 2016 CATERPILLAR CB66B ROLLER CATCB66BLB6600107 N/A 10550221 GG10DLAZZ4 H 105403 2016 CATERPILLAR CB66B ROLLER 1703105KCCE231085 N/A 10550221 GG10DLAZZ4 H 105403 2016 CASE 570N-EP Boxbi JJGN570NCGC737264 N/A 10550221 GG10DLAZZ4 H 105403 2016 CASE 570N-EP Boxbi JJGN570NCGC737264 N/A 10550221 GG10DLAZZ4 H 10550221 GG10DLAZZ4 H 10550221 GG10DLAZZ4 H 1055022 2013 CATERPILLAR CB4B ROLLER CATCB4BJIXL00139 N/A 10550221 GG0DLAZZ4 H 1055022 2013 CATERPILLAR CB4B ROLLER CATCB4BJIXL00139 N/A 10550221 GG0DLAZZ4 H 105502 2015 GG10DLAZZ4 H 105502 2		2006 BROCE RJ 350	404927	N/A		10550221	3210DZAZZ3	Н	1,135	07/27/2006
2017 GRADALL Excavator 4100000793 N/A 10550221 GG92D8A293 H 10140 2009 John Deere 310SS T0310S1176469 N/A 10550221 GG11DLAZZ4 H 10140 2009 John Deere 310SK BACK HOE 170310SKJEE270591 N/A 10550221 GG11DLAZZ4 H 10141 2014 John Deere 310SK BACK HOE 170310SKJEE270591 N/A 10550221 GG11DLAZZ4 H 10141 2017 John Deere 310SK BACK HOE 170310SKJEE270591 N/A 10550221 GG11DLAZZ4 H 10141 2017 John Deere GRADER 1DW672GXHHF680351 N/A 144P 10550221 GG11DLAZZ4 H 10141 2017 John Deere GRADER 1DW672GXHHF680351 N/A 144P 10550221 GG10DLAZZ4 H 10141 2017 John Deere GRADER 1DW672GXHHF680351 N/A 10550221 GG10DLAZZ4 H 10141 2017 John Deere 310SK BACK HOE 170310SKCCE231085 N/A 10550221 GG10DLAZZ4 H 10141 2017 John Deere 310SK BACK HOE 170310SKCCE231085 N/A 10550221 GG10DLAZZ4 H 10141 2016 CASE 570N-EP Boxbl JJGN570NCGC737264 N/A 10550221 GG10DLAZZ4 H 101500 2016 CASE 570N-EP Boxbl JJGN570NCGC737264 N/A 10550221 GG10DLAZZ4 H 10150 2016 CASE 570N-EP Boxbl JJGN570NCGC737264 N/A 10550221 GG10DLAZZ4 H 10150 2016 CASE 570N-EP Boxbl JJGN570NCGC737264 N/A 10550221 GG10DLAZZ4 H 10150 2016 CASE 570N-EP Boxbl JJGN570NCGC737264 N/A 10550221 GG10DLAZZ4 H 10150 2016 CASE 570N-EP Boxbl JJGN570NCGC737264 N/A 10550221 GG10DLAZZ4 H 10150 2017 CASE 201		2016 CATERPILLAR CC34B	CATCC34BTCC300106	N/A		10550221	GGJODLAZZ4	Н	614	12/07/2015
10140 2009 John Deere 310SJ TO310SJ176469 N/A 10550221 GG11DLAZZ4 H 1054022 2014 John Deere 310SK backhoe 170310SKJEEZ70591 N/A 10550221 GG11DLAZZ4 H 1054022 2014 John Deere 310SK backhoe 170310SKJEEZ70591 N/A 144P 10550221 GG11DLAZZ4 H 1054022 105402 H 10550221 GG10DLAZZ4 H 1055		2021 CATERPILLAR AP1055F	CATAP105VTJ501250	N/A		10550221	GGHOD8AZZ4	Н	676	09/21/2020
10142 2014 John Deere 3105K backhoe 1T03105KJEE270591 N/A 10550221 GG11DLAZZ4 H 10143 2014 John Deere 3105K BACK HOE 1T03105KAEE267291 N/A 10550221 GG1DLAZZ4 H 10144 2017 John Deere GRADER 1DW672GXHHF680351 N/A 144P 10550221 GG1DLAZZ4 H 10144 2017 John Deere GRADER 1DW672GXHHF680351 N/A 144P 10550221 GG1DLAZZ4 H 10144 2017 John Deere 3105K BACK HOE 1T03105KCCE231085 N/A 10550221 GG1DLAZZ4 H 10144 2012 John Deere 3105K BACK HOE 1T03105KCCE231085 N/A 10550221 GG1DLAZZ4 H 101500 2016 CASE 570N-EP Boxbl JJGN570KCGC737264 N/A 10550221 GG1DLAZZ4 H 10150 2016 CASE 570N-EP Boxbl JJGN570KCGC737264 N/A 10550221 GG1DLAZZ4 H 10150 2013 CATERPILLAR CB44B ROLLER CATCB44BJJXL00139 N/A 10550221 GG1DLAZZ4 H 10150 2013 CATERPILLAR CB44B ROLLER CATCB44BJJXL00139 N/A 10550221 GG1DLAZZ4 H 10150 2013 CATERPILLAR CB44B ROLLER CATCB44BJJXL00139 N/A 10550221 GG1DLAZZ4 H 10150 2013 CATERPILLAR CB44B ROLLER CATCB44BJJXL00139 N/A 10550221 GG1DLAZZ4 H 10150 2014 CATCB44BJJXL00139 N/A 10550221 GG1DLAZZ4 H 10150 2014 CATCB44BJJXL00139 N/A 10550221 GG1DLAZZ4 H 10150 2014 CATCB44BJJXL00139 N/A 10550221 GG1DLAZZ4 H 10150 2014 CATCB44BJJXL00139 C11405 C1		2017 GRADALL Excavator	4100000793	N/A		10550221	GG92D8AZ93	Н	704	10/31/2018
2014 2014 2017 3015K BACK HOE 1T0310SKAEE267291 N/A 144P 10550221 GG11DLAZZ4 H 2017 3016 Application 10550221 GG10DLAZZ4 H 2016 CATERPILLAR CB66B ROLLER CATCB66BL6660107 N/A 144P 10550221 GG10DLAZZ4 H 2016 CATERPILLAR CB66B ROLLER CATCB66BL6660107 N/A 10550221 GG10DLAZZ4 H 2018 Application 2019 Application 2016 CASE 570N-EP Boxbl JIGNS70NCGC737264 N/A 10550221 GG10DLAZZ4 H 2016 CASE 570N-EP Boxbl JIGNS70NCGC737264 N/A 10550221 GJ20DLAZZ4 H 2015 CASE 570N-EP Boxbl JIGNS70NCGC737264 N/A 10550221 GJ20DLAZZ4 H 2015 CASE 570N-EP Boxbl JIGNS70NCGC737264 N/A 10550221 GJ20DLAZZ4 H 2015 CASE 570N-EP Boxbl JIGNS70NCGC737264 N/A 10550221 GG10DLAZZ4 H 2015 CASE 570N-EP Boxbl JIGNS70NCGC737264 N/A 10550221 GG10DLAZZ4 H 2015 CASE 570N-EP Boxbl JIGNS70NCGC737264 N/A 10550221 GG10DLAZZ4 H 2015 CASE 570N-EP Boxbl JIGNS70NCGC737264 N/A 10550221 GG10DLAZZ4 H 2015 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2015 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2015 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2015 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2016 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2016 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2016 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2016 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2016 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2016 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2016 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2016 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2016 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2016 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2016 CASE 570N-EP Boxbl JIGNS70NCGC737264 H 2016 CASE 570NCATA JIGNS70NCATA JIGNS70NCATA H 2016 CASE 570NCATA JIGNS70NCATA		2009 John Deere 310SJ	TO310SJ176469	N/A		10550221	GG11DLAZZ4	Н	2,537	07/29/2009
10144 2017 John Deere GRADER 1DW672GXHHF680351 N/A 144P 10550221 GGF0DNAZZ4 H 10145 2016 CATERPILLAR CB66B ROLLER CATCB66BLB6600107 N/A 10550221 GGJ0DLAZZ4 H 10145 2016 CASE 570N-EP BOXbl 103105KCCE231085 N/A 10550221 GGJ1DLAZZ4 H 10149 2016 CASE 570N-EP BOXbl 1JGN570NCGC737264 N/A 10550221 GJ2DLAZZ4 H 10150 2016 CHEVY TAHOE 1GN5KFECTGR328487 CI24172 10550221 GB2BU2AZZ3 M 10150 2016 CHEVY TAHOE 1GN5KFECTGR328487 CI24172 10550221 GGJ0DLAZZ4 H 10150 2013 CATERPILLAR CB44B ROLLER CATCB44BJIXL00139 N/A 10550221 GGJ0DLAZZ4 H 10150 2013 CATERPILLAR CB44B ROLLER CATCB44BJIXL00139 N/A 10550221 GGJ0DLAZZ4 H 10150 2013 CATERPILLAR CB44B BRINE Truck 114TSCAAN3WH537815 CI10829 154F , 154CR 10550221 GGJ0DLAZZ4 H 10150 2013 CATERPILLAR CB44B BRINE Truck 2NP3LJ0X7LM656381 CI38934 10550221 N6C2DBAZZ3 H 10150 2013 Peterbilt 348 Brine Truck 2NP3LJ0X3LM665482 CI38935 159P 10550221 BB31UZAZZ3 M 10150 2013 Peterbilt 28337PATCHTRUCK 2NP3LJ0X3LM665482 CI38935 159P 10550221 2625DBAZZ3 H 10161 2011 WACKER PACKER 30005338 N/A 10550221 GGC0UZAZZ4 N 10161 2011 WACKER PACKER 30005338 N/A 10550221 GGC0UZAZZ4 N 10163 2017 Peterbilt 348 DUMP TRUCK 2NP3LJ0X3LM665482 CI38935 159P 10550221 2625DBAZZ3 H 10161 2011 WACKER PACKER 30005338 N/A 10550221 GGC0UZAZZ4 N 10166 2014 Peterbilt 348 DUMP TRUCK 2NP3LJ0X3HM445903 CI3045 163S_163P 10550221 GGC0UZAZZ4 N 10161 2011 WACKER PACKER 30005338 N/A 10550221 2625DBAZZ3 H 10161 2016 PORD F250 1FT7W2B6XGEA12034 CI24169 10550221 BB31C2AZZ3 M 10166 2016 PORD F250 1FT7W2B6XGEA12034 CI24169 10550221 BB31C2AZZ3 M 10166 2016 PORD F550 1FT7W2B6XGEA12034 CI24169 10550221 GGC0UZAZZ4 N 10161 2018 PORD F550 1FT7W2B6XGEA12034 CI24169 10550221 BB31C2AZZ3 M 10161 2018 PORD F550 1FT7W2B6XGEA12034 CI24169 10550221 GGC0UZAZZ4 N 10166 2016 PORD F550 1FT7W2B6XGEA12034 CI24169 10550221 GGC0UZAZZ4 N 10161 2018 PORD F550 1FT7W2B6XGEA12034 CI24169 10550221 GGC0UZAZZ4 N 10161 2018 PORD F550 1FT7W2B6XGEA12034 CI24169 10550221 GGC0UZAZZ4 H 10150221 GGC0UZAZZ4 H 10150221 GGC0UZAZZ4 H 10150221 GGC0UZAZZ4 H 10150221 GGC0UZAZZ4 H 101502		2014 John Deere 310SK backhoe	1T0310SKJEE270591	N/A		10550221	GG11DLAZZ4	Н	1,043	10/16/2014
10144 2017 John Deere GRADER 1DW672GXHHF680351 N/A 144P 10550221 GGF0DNAZZ4 H 101550221 GGJ0DLAZZ4 H 101550221 GGJ0DLAZZ4 H 101550221 GGJ0DLAZZ4 H 101550221 GGJ0DLAZZ4 H 101560221	2014 John Deere 310SK BACK HOE	1T0310SKAEE267291	N/A		10550221	GG11DLAZZ4	Н	1,386	08/12/2014	
2016 CATERPILLAR CB66B ROLLER CATCB66BLB6600107 N/A 10550221 GGJODLAZZ4 H 10148 2012 John Deere 310SK BACK HOE 170310SKCCE231085 N/A 10550221 GG1DLAZZ4 H 10149 2016 CASE 570N-EP Boxbl JJGN570NCGC737264 N/A 10550221 GJ2DLAZZ4 H 10550221 GJ2D		2017 John Deere GRADER	1DW672GXHHF680351		144P	10550221	GGF0DNAZZ4	Н	479	05/01/2017
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2016 CASE 570N-EP Boxbl		2012 John Deere 310SK BACK HOE	1T0310SKCCE231085			10550221	GG11DLAZZ4	Н	•	08/22/2012
2016 CHEVY TAHOE 1GNSKFEC7GR328487 CI24172 10550221 CB2BU2AZZ3 M		2016 CASE 570N-EP Boxbl	JJGN570NCGC737264			10550221	GJ20DLAZZ4	Н		11/28/2016
2015 2 2013 CATERPILLAR CB44B ROLLER CATCB44BJJXL00139 N/A 10550221 GGJODLAZZ4 H 105154 1998 IHC 4700 Tool Truck 1HTSCAAN3WH537815 CI10829 154F , 154CR 10550221 5401D7AZZ3 M 105166 2020 Peterbilt 348 Brine Truck 2NP3LJ0X7LM656381 CI38934 10550221 N6C2D8AZZ3 H 10550221 BB31U2AZZ3 M 105158 2016 FORD F250 1FT7W2B6XGEB54948 CI24092 10550221 BB31U2AZZ3 M 105169 2020 Peterbilt 348 DUMP TRUCK 2NP3LJ0X3LM665482 CI38935 159P 10550221 2625D8AZZ3 H 105160 2013 Peterbilt P8337PATCHTRUCK 2NP2HM7X4DM201008 CI34092 0172 10550221 2310D8AZZ3 H 105161 2011 WACKER PACKER 30005338 N/A 10550221 GGC0UZAZZ4 N 10550221 GGC0UZAZZ4 N 10550221 2625D8AZZ3 H				· ·						05/09/2016
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2020 Peterbilt 348 Brine Truck 2NP3LJ0X7LM656381 CI38934		1998 IHC 4700 Tool Truck	1HTSCAAN3WH537815		154F , 154CR		5401D7AZZ3		•	11/15/1997
2016 FORD F250 1FT7W2B6XGEB54948 CI24092 10550221 BB31U2AZZ3 M 20159 2020 Peterbilt 348 DUMP TRUCK 2NP3LJ0X3LM665482 CI38935 159P 10550221 2625D8AZZ3 H 20160 2013 Peterbilt P8337PATCHTRUCK 2NP2HM7X4DM201008 CI34092 0172 10550221 2310D8AZZ3 H 20161 2011 WACKER PACKER 30005338 N/A 10550221 GGCOUZAZZ4 N 20163 2017 Peterbilt 348 DUMP TRUCK 2NP3LJ0X9HM445903 CI30045 163S_163P 10550221 2625D8AZZ3 H 20164 2016 FORD F250 1FT7W2B6XGEA12034 CI24169 10550221 BB31C2AZZ3 M 20165 2010 IHC 7600 DUMPTRUCK IHTWYSJT8AJ244517 CI38942 165P 10550221 2625D8AZZ3 H 20168 2008 John Deere 210LE T0210LE888438 N/A 10550221 JJ20DLAZ94 H 20171 2018 FORD F550 1FD0W5HT3JEC67630 CI38947 171F,171G,171A 10550221 BB50D5AZZ3 M 20172 1995 BOMAG BW55E ROLLER 10162025061 N/A 10550221 GGJOUKAZZ4 H 20173 2016 FORD F450 1FDUF4GT8GEA66392 CI26975 173F,173G,173CR 10550221 BB4DD4AZZ3 M 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H					,				•	11/08/2019
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2017 Peterbilt 348 DUMP TRUCK 2NP3LJOX9HM445903 CI30045 163S_163P 10550221 2625D8AZZ3 H 2016 FORD F250 1FT7W2B6XGEA12034 CI24169 10550221 BB31C2AZZ3 M 20165 2010 IHC 7600 DUMPTRUCK IHTWYSJT8AJ244517 CI38942 165P 10550221 2625D8AZZ3 H 20168 2008 John Deere 210LE 70210LE888438 N/A 10550221 JJ20DLAZ94 H 20171 2018 FORD F550 1FD0W5HT3JEC67630 CI38947 171F,171G,171A 10550221 BB50D5AZZ3 M 20172 1995 BOMAG BW55E ROLLER 101620025061 N/A 10550221 GGJOUKAZZ4 H 20173 2016 FORD F450 1FDUF4GT8GEA66392 CI26975 173F,173G,173CR 10550221 BB4DD4AZZ3 M 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H 20175 1997 CATERPILLAR 120H GRADER 1997 CATERPILLAR 120H GRADER 1997 CATERPILLAR 120H GRADER 1997 CATERPILLAR 120H GRADER 1997 CATERPILLAR 120H GRADER 1997 CATERPILLAR 120H GRADER 1997 CATERPILLAR 120H GRADER 1997 CATERPILLAR 120H GRADER 1997 CATERPILLAR 120H GRADER 1997 CATERPILLAR 120H GRADER 1997 CATERPILLAR 120H GRADER 1997 CATERPILLAR 120H GRADER 1997 CATERPILLAR 1997 CATERPILLA					01/2				•	10/15/2012
0164 2016 FORD F250 1FT7W2B6XGEA12034 CI24169 10550221 BB31C2AZZ3 M 0165 2010 IHC 7600 DUMPTRUCK IHTWYSJT8AJ244517 CI38942 165P 10550221 2625D8AZZ3 H 0168 2008 John Deere 210LE T0210LE888438 N/A 10550221 JJ20DLAZ94 H 0171 2018 FORD F550 1FD0W5HT3JEC67630 CI38947 171F,171G,171A 10550221 BB50D5AZZ3 M 0172 1995 BOMAG BW55E ROLLER 101620025061 N/A 10550221 GGJOUKAZZ4 H 0173 2016 FORD F450 1FDUF4GT8GEA66392 CI26975 173F,173G,173CR 10550221 BB4DD4AZZ3 M 0175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H				•	163S 163P					05/22/2017
2010 IHC 7600 DUMPTRUCK IHTWYSJT8AJ244517 CI38942 165P 10550221 2625D8AZZ3 H 20168 2008 John Deere 210LE T0210LE888438 N/A 10550221 JJ20DLAZ94 H 20171 2018 FORD F550 1FD0W5HT3JEC67630 CI38947 171F,171G,171A 10550221 BB50D5AZZ3 M 20172 1995 BOMAG BW55E ROLLER 101620025061 N/A 10550221 GGJOUKAZZ4 H 20173 2016 FORD F450 1FDUF4GT8GEA66392 CI26975 173F,173G,173CR 10550221 BB4DD4AZZ3 M 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H					1000_100.				•	01/28/2016
2008 John Deere 210LE T0210LE888438 N/A 10550221 JJ20DLAZ94 H 20171 2018 FORD F550 1FD0W5HT3JEC67630 CI38947 171F,171G,171A 10550221 BB50D5AZZ3 M 20172 1995 BOMAG BW55E ROLLER 101620025061 N/A 10550221 GGJOUKAZZ4 H 20173 2016 FORD F450 1FDUF4GT8GEA66392 CI26975 173F,173G,173CR 10550221 BB4DD4AZZ3 M 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H					165P				•	12/30/2009
2018 FORD F550 1FD0W5HT3JEC67630 CI38947 171F,171G,171A 10550221 BB50D5AZZ3 M 20172 1995 BOMAG BW55E ROLLER 101620025061 N/A 10550221 GGJOUKAZZ4 H 20173 2016 FORD F450 1FDUF4GT8GEA66392 CI26975 173F,173G,173CR 10550221 BB4DD4AZZ3 M 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H					1031				•	11/11/2008
1995 BOMAG BW55E ROLLER 101620025061 N/A 10550221 GGJOUKAZZ4 H 20173 2016 FORD F450 1FDUF4GT8GEA66392 CI26975 173F,173G,173CR 10550221 BB4DD4AZZ3 M 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H				•	171F 171G 171A					06/20/2019
2016 FORD F450 1FDUF4GT8GEA66392 CI26975 173F,173G,173CR 10550221 BB4DD4AZZ3 M 20175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H					1711,71710,1717				•	10/14/1996
0175 1997 CATERPILLAR 120H GRADER 4MK00341 N/A 10550221 GGFODMAZZ4 H				· ·	173F 173G 173CP					09/01/2015
					1/31,1/30,1/3CR				•	05/16/1997
1176 7000 (HEVY 1500 D/O SELEK 133 OUE / 1008/O TOTALO 1008/O TAKEN 27 DOTALO A TOTALO M		2009 CHEVY 1500 P/U	3GCEK13319G219084	CI10612		10550221	BB20U1AZZ3	П М	•	06/10/2009
0176 2009 CHEVY 1500 P/U 3GCEK13319G219084 C110612 10550221 BB50B5AZZ3 M		,							•	07/18/2011
·		·							•	
0179 2012 John Deere 60D EXCAVATOR 1FF060DXPCG281603 N/A 10550221 GG2ADMAZ94 H 0190 1997 LINCOLN WELDER 10375-U1970604604 N/A 10550221 RR01UZDZZ2 H				•					•	01/11/2013 10/17/1 907

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							N	METER	ACQ
EQUIPMENT	EQ DESCRIPTION	SERIAL NUMBER	LICENSE	EMPLOYEE	DEPT	CLASS	TYPE	READING	DATE
DEPARTMENT: 105	550221 - PW STREETS								
0195	2016 FORD F250	1FT7W2B61GEA12939	CI24170		10550221	BB31C2AZZ3	М	28 734	04/12/2016
0651	2020 John Deere Z960M ZTRACK	1TC960MDCKT070924	N/A		10550221	KK11UKAZ14	Н	•	08/15/2019
0652	2012 John Deere 997 LAWN MOWER	1TC997SCHCT071838	N/A		10550221	KK11DKAZ14	н		08/15/2012
0654	2000 IHC 4700 4700 Tool Truck	1HTSCAAN6YH280927	CI14960		10550221	5580D7AZZ3	M	· ·	09/16/1999
0656	2021 Peterbilt 337 Dump Truck	2NP2HJ7X4MM735009	CI40181		10550221	2625D8AZZ3	Н	•	07/15/2020
0657	2014 BANDIT CHIPPER100	4FMUS2223ER002941	N/A		10550221	KKB2DZAZZ3	н		04/01/2014
0659	2015 John Deere 6140 M	1L06140MVFG827260	N/A		10550221	JJ10DLAZZ4	н	· ·	08/10/2015
0665	2021 FORD F250	1FT7W2B68MED06155	CI41619	665F	10550221	BB30U2AZZ3	M	· ·	03/26/2021
0667	2017 FORD F250 2017 FORD F550	1FD0W5HT1HEC03533	CI32061	667F & 667A	10550221	BB50D5AZZ3	M	· ·	12/15/2016
0668	2007 MACK DUMP TRUCK	1M2AG11C57M057744	CI32001 CI14964	0071 & 007A	10550221	2625D8AZZ3	М	•	04/04/2006
0669	2013 GMC 3500	1GD322CG1DF119816	CI22690	669P & 669S	10550221	BB40U3AZX3	M	•	08/30/2012
0674	2018 Peterbilt 348 DEBRIS TRK	2NP3LJ0X5JM468164	CI32225	674CR	10550221	65F0D8AZZ3	Н		08/04/2017
0675	2001 TORO 3300 TRUCKSTER	070205TC-210000221	N/A	074CK	10550221	UE3AEKAZZ4	н		09/27/2001
0677	2002 FORD F350	1FTWW32S52EC19633	CI14967		10550221	BB40U3AZZ3	М	· ·	03/07/2001
0679	2019 FORD F350	1FDRF3HT4KDA09250	CI38937	0699	10550221	BB40D3AZZ3	M	•	04/30/2019
0680	2012 John Deere LARGE AG TRACT	1LO7330HCCH724400	N/A	0033	10550221	JJ10DLAZZ4	Н	· ·	10/02/2012
0682	2017 John Deere 6105E AG TRACT	1P06105ECH0010063	N/A N/A		10550221	JJ10DLAZZ4	H		08/05/2017
0688	2019 Peterbilt 389 Haul Truck	1XPXD49X3KD612729	CI37470	689T	10550221	2670D8AZZ3	М		11/29/2018
0693	2015 TORO 5900	315000242	N/A	0031	10550221	KK11DKAZ14	Н	· ·	08/25/2015
0694	2016 PETERBUILT 348 DUMP TRUCK	2NP3LJ9X5GM361868	CI24095	694P	10550221	2625D8AZZ3	н	· ·	11/30/2015
0696	2008 John Deere 5525	LV5525R454858	N/A	0541	10550221	JJ10DLAZZ4	н	· ·	11/19/2008
100s	2020 MONROE SPREADER	20-03-8141	N/A N/A		10550221	NN81ZZAZW3	N	•	12/03/2020
101s	2018 MONROE SPREADER	19-01-8364	N/A		10550221	NN81ZZAZW3	N		02/15/2019
1015 102T	2005 BELSHE T-18	16JF0162551040994	CI14883		10550221	FFD0ZZAZZ3	N		07/07/2005
106T	1994 TERRY'S 1600 TRAILER	JLA1620RN100510	CI14005 CI14885		10550221	FFD0ZZAZZ3	N		10/05/1994
110P	2013 HENDERSON 11 42 IS Plow	RSP-14803	N/A		10550221	NN81ZZAZW3	N		11/01/2013
110S	2010 HENDERSON SANDER	FSH31425	N/A		10550221	NN81ZZAZW3	N		02/08/2011
111T	2018 BELSHE T16-2EP Trailer	16JF01827J1049767	CI37474		10550221	FFG0ZZAZZ3	N		09/28/2018
1111 114t	2019 TITAN CG-70-6-14	5D2C61423K1009631	CI37474 CI39351		10550221	FFP0ZZAZZ3	N		02/04/2019
115H	2017 John Deere HH80C HYD HMMR	1T0HH80CKH000188	N/A		10550221	PP10ZZAZZ4	N		09/22/2017
115R	2017 John Deere RT66 ROTOTILLER	1TORT66XJH0000372	N/A		10550221	KJ6TZZAZZ4	N		09/22/2017
115k	2017 John Deere Kroo KOTOTILLEK	4C0FS1822IA000234	CI37472		10550221	FFD0ZZAZZ3	N		09/28/2017
119P	2017 FALLS PLOW HDR-12A	R6056P17	N/A		10550221	NN20ZZAZZ3	N		04/17/2017
119P 123CR	1997 Liftmoore 3200REL	13-7537W154	N/A N/A		10550221	PG35ZZAZZ3	N		11/19/1996
123F	1997 EIRINOOFE 3200KEE	13-7337W134 FUEL	N/A N/A		10550221	TY51DZAZZ4	N		01/01/1994
123F 123G	2005 BRIGGS 030209	1011155760	N/A N/A		10550221	RR01UZAZZ4	N		01/01/1994 09/07/2 0
1230	2003 BKIGGS 030209	1011133700	N/A		10550221	KKU1UZAZZ4	IN	1	09/0//20

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							N	METER	ACQ
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DEPARTMENT: 105	50221 - PW STREETS								
144P	2017 FALLS PLOW HDR-12A	R6055P17	N/A		10550221	NN20ZZAZX3	N	1	04/17/2017
153T	2002 FRANK'S GN30 TRAILER	5BSBA30242C008689	CI14897		10550221	FFG0ZZAZZ3	N	1	07/25/2002
154CR	1998 AUTO CRANE 3203PR	023A5290	N/A		10550221	PG35ZZAZZ3	N	0	
154F	1994 BULK BULK	FUEL	N/A		10550221	TY51DZAZZ4	N	1	01/01/1994
154G	1999 HONDA EB2500	GC02-5L07396	N/A		10550221	RR01UZAZZ4	N	1	11/23/1998
159P	2020 MONROE MP41R11 PLOW	19-01-2147	N/A		10550221	NN20ZZAZX3	N	0	09/02/2019
159S	2020 MONROE MV-168-82-56	MV168-82-56	N/A		10550221	NN81ZZAZW3	N	0	09/02/2019
163P	2017 MONROE PLOW MP41R11ISCT,316	17-03-2117	N/A		10550221	NN20ZZAZX3	N	1	05/22/2017
163S	2017 MONROE SANDER MV1688262P	17-03-7386	N/A		10550221	NN81ZZAZW3	N	1	05/22/2017
165P	2010 MONROE MP36R11ISCTPLOW	08-12-1928	N/A		10550221	NN20ZZAZX3	N	1	
165S	2010 WARREN EAC2400 SLT SPD	SC17540	N/A		10550221	NN81ZZAZW3	N	0	08/31/2010
171A	2018 INDUSTRIAL GOLD COMPRESSOR	111518-36048	N/A		10550221	SSA1UZZZZ4	N	1	06/20/2019
171F	1994 BULK BULK	FUEL	N/A		10550221	TY51DZAZZ4	N	1	01/01/1994
171g	2018 MILLER GENERATOR	MJ401330R	N/A		10550221	RR01UZDZZ2	N	1	06/20/2019
173CR	2016 STELLAR EC3200	FDB15E2151K	N/A		10550221	PG35ZZAZZ4	N	0	
173F	2015 BULK BULK	FUEL	N/A		10550221	TY51DZAZZ4	N	1	01/01/2014
173G	2016 VANAIR COMPRESSOR	30-15E0031	N/A		10550221	SSA2UZAZZ4	Н	115	04/01/2016
179T	2001 BELSHE T-18	16JFO162X11035526	3-50620		10550221	FFD0ZZAZZ3	N	1	02/28/2001
189SMAL	1994 SMALL CANS BULK	FUEL	N/A		10550221	TY50UZZZZA	N	1	01/01/1994
20154	2020 FORD F550	1FDUF5GT4LDA12741	CI44517	20154A,20154F	10550221	BB50D5AZZ3	М	1,056	07/19/2021
20154A	2020 INDUSTRIAL GOLD CI13GEH30-P	120320-2395	N/A		10550221	SSA1UZZZZ4	N	0	09/28/2021
20154F	2020 Delta 484000	194840007068	N/A		10550221	TY51DZAZZ4	N	1	09/28/2021
21167	2020 Peterbilt DUMP TRUCK	2NP3LJ9X4LM707029	CI41614		10550221	2625D8AZZ3	Н	450	05/17/2021
21182	2021 HUSQVARNA CONCRETSAW	2250001	N/A		10550221	PP80UKAZC4	Н	1	11/30/2021
21691	2021 John Deere 5100 E	1LV5100EEMM409762	N/A		10550221	JJ10DKAZZ4	Н	77	08/30/2021
21-695	2021 Peterbilt 348 Brine Truck	2NP3LJ0X6MM737129	CI42045	21-695P	10550221	2625D8AZZ3	Н	535	11/20/2020
21-695P	2020 MONROE MP41R11 PLOW	20-03-1652	N/A		10550221	NN20ZZAZX3	N	1	11/20/2020
21-695S	2021 MONROE MV-168-82-56	20-03-8142	N/A		10550221	NN81ZZAZW3	N	1	11/20/2020
22186	2022 John Deere Excavator	1FF060GXKMJ294428	N/A		10550221	GGHOD8AZZ4	Н	3	11/17/2021
659B	2018 John Deere CX15 Rotary Cut	1P0CX15EEJF060429	N/A		10550221	JK12ZZAZZ4	N	1	09/10/2018
661T	1996 TRAILER ET ***	T11474-11384	N/A		10550221	FFD0ZZAZZ3	N	1	07/30/1996
663smal	2018 SMALL CANS FUEL	663smal	N/A		10550221	TY50UZZZZA	N	0	
664CTR	2002 MANITOU F410	2961	N/A		10550221	KKCOZZAZZ4	N	1	06/27/2002
665f	2021 BULK BULK	FUEL	N/A		10550221	TY51DZAZZ4	N	1	03/26/2021
667F	2017 BULK BULK	N/A	N/A	667A	10550221	TY51DZAZZ4	N	1	06/17/2019
668S	2011 FLINK HG115782S4000	9758	N/A		10550221	NN81ZZAZW3	N	1	

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EQUIPMENT	EQ DESCRIPTION	SERIAL NUMBER	LICENSE	EMPLOYEE	DEPT	CLASS	TYPE	READING	DATE
DEPARTMENT: 10	0550221 - PW STREETS								
669P	2002 BUYERS SNOWDOGG EX80	M062002421	N/A	669P & 669S	10550221	NN20ZZAZX3	N	1	10/08/2002
674CR	2018 ATLAS AL1	0717-0008	N/A		10550221	PG35ZZAZZ3	N	0	
680B	2012 John Deere TRIPLE BRUSHHOG	1POCX15ETCP023199	N/A		10550221	JK12ZZAZZ4	N	0	09/04/2012
582B	2018 John Deere MX6 ROTARY CUTT	1P00MX6CHJP072911	N/A		10550221	JK12ZZAZZ4	N	1	09/10/2018
689t	2018 LANDOLL 855E TRAILER	1LH855WJ4J1E26160	CI37462		10550221	FFGAZZAZZ3	М	5,042	06/27/2018
591B	2015 John Deere MX6 ROTARY CUTT	JDMX6659B	N/A		10550221	JK12ZZAZZ4	N	1	10/01/2015
591T	2003 HCREEK FLATBED	5BSAU12263C011793	CI14970		10550221	FFD0ZZAZZ3	N	1	08/27/2003
594P	2015 SNOWDOGG 10'42" PLOW	1111	N/A		10550221	NN20ZZAZX3	N	1	10/17/2015
594S	2015 HIGHWAY SANDER	449170	N/A		10550221	NN81ZZAZW3	N	1	11/30/2015
596B	2018 John Deere MX6 ROTARY CUTT	1P00MX6CCJP072913	N/A		10550221	JK12ZZAZZ4	N	1	09/07/2018
697B	2018 John Deere CX15 Rotary Cut	1P0CX15EVJF060425	N/A		10550221	JK12ZZAZZ4	N	1	09/10/2018
Distinct Count of I	Equipment: 135								
DEPARTMENT: 10	0550222 - PW STORMWATER MAINTENANCE								
0800	2014 FORD F350	1FD8W3HT0EEB67787	CI24422	800P	10550222	BB40D3AZZ3	М	66,685	07/15/2014
0801	1999 FREIGHTLIN TOOL TRUCK	1FV6HFAA4XH960886	CI14972	801F 801G	10550222	5401D7AZZ3	М	15,266	11/23/1998
0802	2018 Peterbilt 348 DUMP TRUCK	2NP3LJ0X7JM498279	CI37507		10550222	2625D8AZZ3	Н	1,121	05/01/2018
0803	2020 Peterbilt 337 Dump Truck	2NP2HJ7X3MM733042	CI40174		10550222	2625D8AZZ3	Н	383	06/19/2020
0804	2011 John Deere 310SJ	1T0310SJEBD209260	N/A	804H	10550222	JJ10DLAZZ4	Н	2,230	09/14/2011
0805	2011 CHEVY 2500 P/U	1GC2KVCGXBZ317274	CI17761		10550222	BB40B5DZZ3	М	126,240	01/01/2011
808	2011 FREIGHTLINER Sweeper	1FVXF8001BDAX3814	CI22714		10550222	2223C7AZZ3	Н	3,894	05/28/2013
0809	2015 ELGIN Sweeper	1FVACXDT4FHGC7449	CI23574		10550222	2223D7AZZ3	Н	5,178	05/01/2015
0810	2011 FREIGHTLINER MM106042SB SWEE	1FVXF8003BDAX3815	CI19841		10550222	2223C7AZZ3	Н	4,175	06/19/2012
0811	2017 FORD F350	1FD8W3H63HEC81295	CI32065		10550222	BB40U3AZZ3	М	16,888	10/26/2016
0812	2018 Peterbilt 220 SWEEPER	3BPPHM7X7JF591593	CI32218	812AX	10550222	2223D7AZZ3	М	18,547	07/27/2017
0813	2017 FORD F250	1FT7W2BT9HEC34099	CI32320		10550222	BB31D2AZZ3	М	27,385	02/08/2017
0814	2021 Peterbilt 348 VACTOR FLUS	1NP3LJ0X4MD735014	CI42053		10550222	5233D8AZZ3	Н	40	08/18/2020
0850	2012 CHEVY 2500 P/U	1GC1KVCG6CF202072	CI19832		10550222	BB40B5DZZ3	М	70,861	06/05/2012
0858	2016 FORD F350	1FD8W3H66GEA38997	CI23587		10550222	BB40U3AZZ3	М	53,078	08/27/2015
0860	2019 WARREN Excavator	CAT03017LJH701103	N/A		10550222	GGHOD8AZZ2	Н	273	08/26/2019
)866	1997 IHC 4700 F 4700 Tool Truck	1HTSCAAN5VH449895	CI14962		10550222	5401D7AZZ3	М	91,843	11/19/1996
0869	2008 CATERPILLAR 938G	CAT0938GJRTB03735	N/A		10550222	GG51DNAZZ4	Н	5,234	04/22/2008
		CAT0938GJRTB03735 1HTWYSJT1AJ279688	N/A CI14953		10550222 10550222	GG51DNAZZ4 2625D8AZZ3	H H	·	04/22/2008 12/30/2009
0869 0871 0873	2008 CATERPILLAR 938G		•					4,814	

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EQUIPMENT	EQ DESCRIPTION	SERIAL NUMBER	LICENSE	EMPLOYEE	DEPT	CLASS	TYPE	READING	DATE
DEPARTMENT: 10	550222 - PW STORMWATER MAINTENANCE								
0881	2017 John Deere 750K TRACK DOZ	1T0750KXEHF317353	N/A		10550222	GGD2DZAZ44	Н	2 003	10/16/2017
0883	2019 CATERPILLAR Excavator	CATM320FCFB200586	N/A		10550222	GG2ADMAZ94	N	•	10/30/2017
0884	2013 John Deere 310SK BACK HOE	1T0310SKVDE249922	N/A N/A		10550222	GG11DLAZZ4	Н		09/04/2013
0885	2008 John Deere 200DLC	FF200DX511103	N/A		10550222	JJ10DLAZZ4	н	•	12/18/2008
0887	2019 FORD F350	1FD8X3HTXKED40014	CI38938		10550222	BB40D3AZZ3	M	•	03/29/2019
0892	2019 FORD F330 2011 John Deere 315	1T00315ACBG208891	C136936 N/A	902CD 902T	10550222	GG70DMAZK4	H	· ·	03/29/2019
			•	892GR,892T					
113T	2012 MAXEY Tilt Trailer	55DTD1621CM000097	N/A	892GR	10550222	FFD1ZZAZZ3	N		01/03/2012
687SMAL	2015 SMALL CANS BULK	FUEL	N/A		10550222	TY50UZZZZA	N	1	00/24/2014
300P	2014 BOSS RT3 Superduty 8	211998	N/A		10550222	NN20ZZAZX3	N		09/24/2014
301F	1994 BULK BULK	FUEL	N/A		10550222	TY51DZAZZ4	N		01/01/1994
301G	2015 John Deere GENERATOR	A1403001970	N/A		10550222	RR01UZDZZ4	N		09/01/2015
301SMAL	2014 SMALL CANS BULK	FUEL	N/A		10550222	TY50UZZZZA	N	0	
304H	2011 New Holland HH305	11111	N/A		10550222	PP10ZZAZZ4	N		07/02/2011
311T	1986 W W 24GN TRAILER	11W4F2435GW137279	CI14888		10550222	FFG0ZZAZZ3	N		12/10/1985
312AX	2018 John Deere D36SB REAR ENG	PE40450052823	CI32218		10550222	2223D7AZZ3	N	1	08/15/2017
352T	1988 MODERN MFG TRAILER	1VN6AD17N100398	N/A		10550222	FFD0ZZAZZ3	N	1	01/01/1988
871S	2010 WARREN EAC2400 SLT SPD	SC17545	N/A		10550222	NN81ZZAZW3	N	1	08/31/2010
392GR	2014 John Deere GRAPPLE	1TOGT72XVB0000045	N/A	892T	10550222	GG70ZZAZZ4	N	1	07/10/2013
892T	2012 MAXEY TD 10.4K	55DTD1623CM000098	CI37468		10550222	FFD1ZZAZZ3	N	0	01/03/2012
893t	2018 HOLT TRAILER	4C0FS12161A000253	CI37473	0861	10550222	FFD0ZZAZZ3	N	1	12/04/2018
Distinct Count of E	quipment: 41								
DEPARTMENT: 10	550223 - PW TRAFFIC								
0624	2012 CHEVY SILVERADO Silverado	1GCRCPE00CZ289848	CI19831	624G	10550223	BB20B1AZZ3	М	72,262	04/30/2012
0625	2009 FORD ESCAPE	1FMCU92789KC27160	CI10617		10550223	CA32U1AZZ3	М	85,863	05/15/2009
0626	2011 CHEVY 1500 P/U	1GCRCPE04BZ292539	CI17759	626G	10550223	BB20B1AZZ3	М	85,026	06/22/2011
0627	2015 FORD F550	1FD0X5GTXFEA83209	CI23571	627BU	10550223	BB50D5AZZ3	М	45,806	02/26/2015
0628	2016 FORD F150	1FTEX1CF0GKD96775	CI24171		10550223	BB20B2AZZ3	М	55,307	04/21/2016
0629	2017 FORD F150	1FTEX1CF9HKC07851	CI30040		10550223	BB20B2AZZ3	М		10/20/2016
0630	2010 CHEVY SILVERADO 1500 P/U	1GCSCPE02AZ217497	CI5532		10550223	BB20B1AZZ3	М	•	08/20/2010
0633	2020 FORD F350	1FD8W3G60LEC63475	CI41607		10550223	BB40U3AZZ3	М	•	11/04/2020
0634	2020 FORD F150	1FTEW1C50LKE80891	CI41605		10550223	BB2OU2AZZ3	M	•	10/16/2020
0641	2019 FORD F350	1FDRF3G60KED40011	CI38939	641CR	10550223	BB40U3AZZ3	M		10/22/2019
0642	2011 CHEVY 3500	1GB3CZCG0BF239361	CI24100	642P	10550223	BB51U3AZZ3	M	•	07/28/2011
			CI24100 CI10820		10550223				
0643	2009 CHEVY 3500	1GBJC74K49F157982	C110820	643CR	10550223	BB51U3AZZ3	М	90,235	06/26/20

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City of Norman Fleet Management 3114.rpt

EQUIPMENT MASTER LIST BY DEPARTMENT

PAGE: 8
DATE: 01/20/2022 10:49

This report displays meter information for the fuel meter only.

							N	METER	ACQ
EQUIPMENT	EQ DESCRIPTION	SERIAL NUMBER	LICENSE	EMPLOYEE	DEPT	CLASS	TYPE	READING	DATE
DEPARTMENT: 105	550223 - PW TRAFFIC								
0644	2016 FORD F250	1FTBF2A67GEC25048	CI24097		10550223	BB31U2AZZ3	М	44,108	03/02/2016
5060	2008 CHEVY COLORADO	1GCCS34E888204590	CI14857		10550223	BB20U2GZZ3	М	70,255	04/03/2008
621t	2019 Stalker T.M.S.A.M	7L31F6210KG001785	CI40167		10550223	FFL0ZZAZZ3	N	1	09/18/2019
623T	2010 FRANK'S TRAILER	5BEBU1018BC157290	N/A		10550223	FFD1ZZAZZ3	N	1	12/08/2010
626G	2012 HONDA EV2000IA	EAAJ-2288716	N/A		10550223	RR01UZDZZ2	N	1	06/13/2012
627BU	2015 VERSALIFT VST	KW140107	N/A		10550223	PP50ZZAZZ4	N	0	
627g	2020 HONDA GENERATOR	EAJT-1009178	N/A		10550223	RR01UZDZZ2	N	1	07/28/2020
629G	2012 HONDA EV2000IA	EAAJ-2267995	N/A		10550223	RR01UZDZZ2	N	1	06/13/2012
630G	2012 HONDA EV2000IA	EAAJ-2267994	N/A		10550223	RR01UZDZZ2	N	1	06/13/2012
632T	2005 HOLT EQPT TRL	4C0FS08145A000439	CI14986		10550223	FFD0ZZAZZ3	N	1	09/29/2005
634SMAL	2013 SMALL CANS BULK	FUEL	N/A		10550223	TY50UZZZZA	N	1	01/01/1994
635SMAL	1994 SMALL CANS BULK	FUEL	N/A		10550223	TY50UZZZZA	N	1	01/01/1994
641CR	2019 Stahl 3200LRX	419-000057	N/A		10550223	PG35ZZAZZ4	N	0	
643CR	2009 STELLAR EC3200	LDB16E2492K	N/A		10550223	PG35ZZAZZ4	N	0	
643t	2019 Stalker T.M.S.A.M	7L31F6217K6001783	CI40168		10550223	FFL0ZZAZZ3	N	1	09/18/2019
644G	2020 HONDA GENERATOR	EAMT-1288219	N/A		10550223	RR01UZDZZ2	N	1	07/28/2020
644t	2019 Stalker T.M.S.A.M	7L31F6219KG001784	CI40169		10550223	FFL0ZZAZZ3	N	1	09/18/2019
645G	2021 HONDA GENERATOR	EAMT-1288224	N/A		10550223	RR03UZAZZ4	N	1	07/28/2020
645T	2021 HOLT TRAILER	4C0FS081XLA000152	CI42061		10550223	FFD0ZZAZZ3	N	1	08/10/2020
648T	2021 HOLT TRAILER	4C0FS1218LA000116	CI42063		10550223	FFD0ZZAZZ3	N	1	08/10/2020
Distinct Count of E	quipment: 32								
DEPARTMENT: 105	550225 - PW STORMWATER QUALITY								
0898	2017 FORD F150	1FTFW1EF8HKC48010	CI32319		10550225	BB20B2AZZ3	М	41,350	10/26/2010
0899	2016 FORD F150	1FTFW1EF2GKE18876	CI24163		10550225	BB20B2AZZ3	М	•	04/05/2016

Distinct Count of Equipment: 2

PAGE: 9



3114.rpt

City of Norman Fleet Management

EQUIPMENT MASTER LIST BY DEPARTMENT

DATE: 01/20/2022 10:49

Total Distinct Count of Equipment: 248

REPORT PARAMETERS:

INCLUDE OBSOLETE LOOKUP CODES: NO

GROUP BY: Department

PAGE BREAK: No

EQUIPMENT NUMBER RANGE:

MODEL YEAR RANGE:

ECO: EQUIPMENT COMPANY RANGE RANGE:

ALL YEARS

ECO: EQUIPMENT COMPANY RANGE RANGE:

001 to 001

DPN: EQUIPMENT DEPARTMENT RANGE: 10550170 to 10550170

10550171 to 10550171 10550172 to 10550172 10550201 to 10550201 10550210 to 10550210

More Department Ranges Were Selected, But Are Not Displayed

EQC: EQUIPMENT CLASS RANGE:

SHP: EQUIPMENT SHOP RANGE:

STE: EQUIPMENT SITE RANGE:

MAK: EQUIPMENT MAKE RANGE:

MOD: EQUIPMENT MODEL RANGE:

ALL MODELS

EBC: EQUIPMENT BILLING CODE RANGE: ALL BILLING CODES
EMG: MONITOR GROUP RANGE: ALL MONITOR GROUPS

STA: EQUIPMENT STATUS RANGE: ALL STATUSES
EUC: EQUIPMENT USE CODE: * ALL VALUES

REPORT VERSIONS:

Report Version: 20180305.1300 Script Version: 20180305.1300

^{*} An equipment will be displayed, even when NO is selected to "Include Obsolete Lookup Codes", if it has another active usage code.

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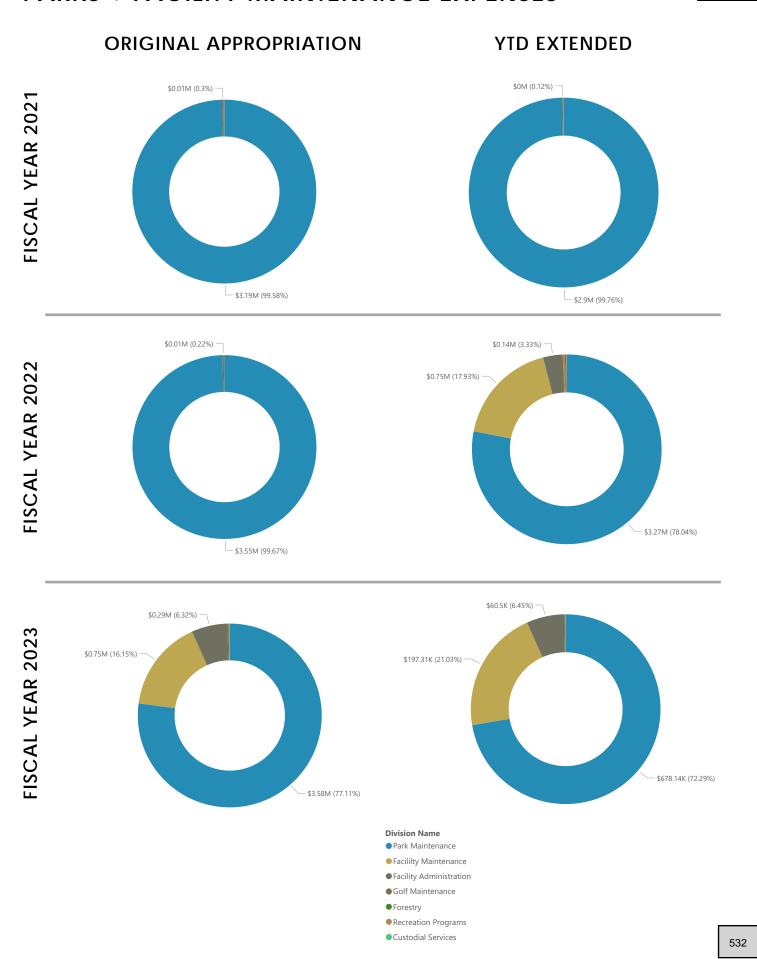
A.2 FINANCIAL DATA

PUBLIC WORKS DEPARTMENTAL EXPENSES



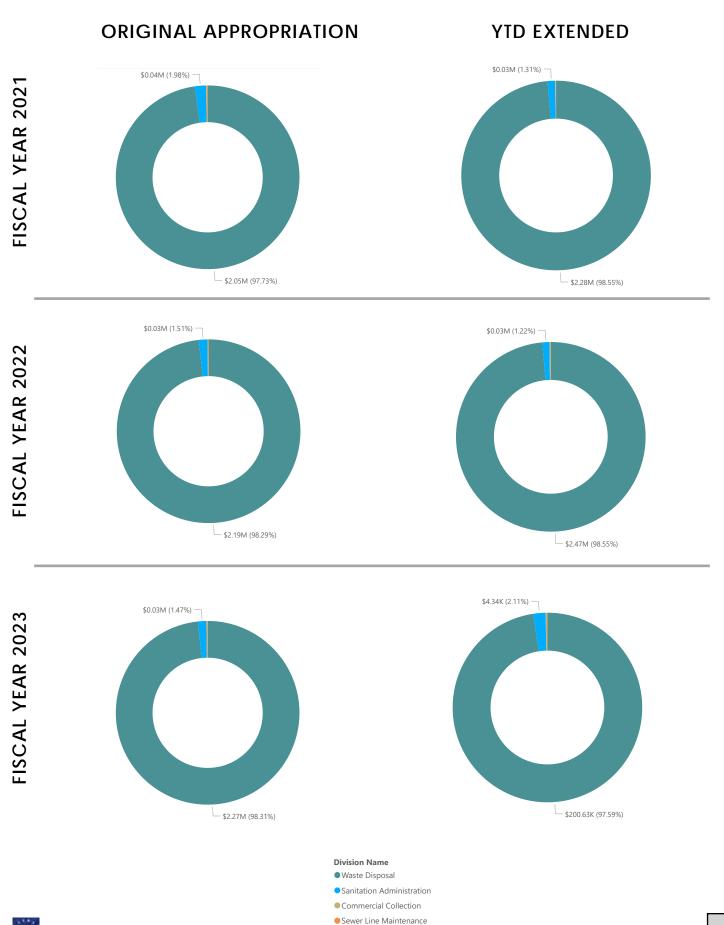
PARKS + FACILITY MAINTENANCE EXPENSES

Item 11.



UTILITIES DEPARTMENTAL EXPENSES (AT NORTH BASE)

Item 11.

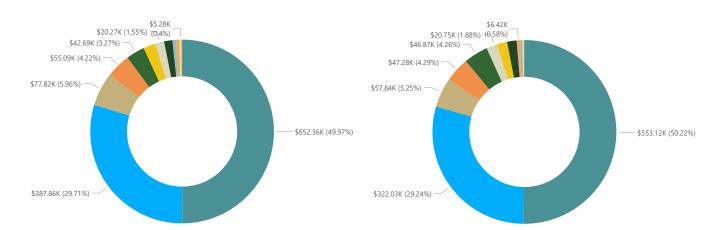


FIRE DEPARTMENTAL EXPENSES (AT NORTH BASE)

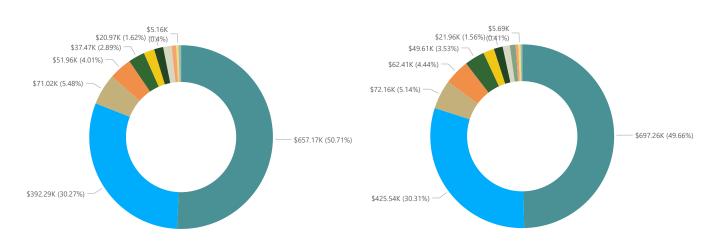
ORIGINAL APPROPRIATION

YTD EXTENDED

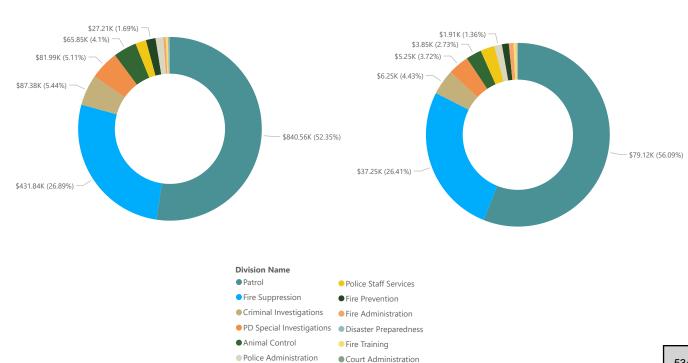












Item 11.

NORTH BASE UTILITY EXPENSES BY DIVISION

ORIGINAL APPROPRIATION YTD EXTENDED \$24.75K (2.38%) — \$0.02M (1.68%) -FISCAL YEAR 2021 \$997.87K (95.97%) \$1.28M (96.53%) \$0.02M (1.63%) \$0.03M (2.02%) — FISCAL YEAR 2022 \$1.09M (96.73%) \$1.39M (96.75%) \$0.02M \$0.16M (9.39%) —(1.45%) \$4.13K (1.6%) FISCAL YEAR 2023 \$1.48M (89.06%) \$251.44K (97.55%) **Division Name** Traffic Control • Fleet Administration • Fuel and Parts Inventory

Sewer Line Maintenance

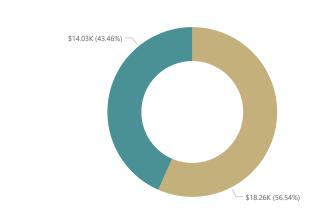
LINDSEY UTILITY EXPENSES BY DIVISION

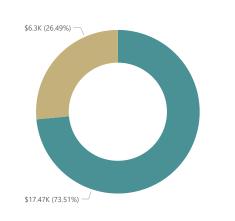
Item 11.

FISCAL YEAR 2021

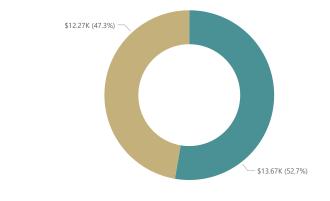
ORIGINAL APPROPRIATION

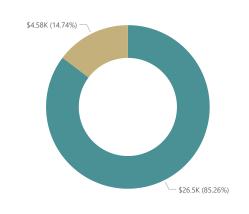
YTD EXTENDED



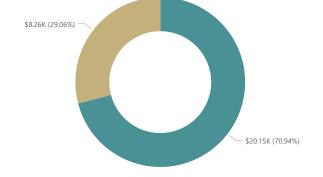


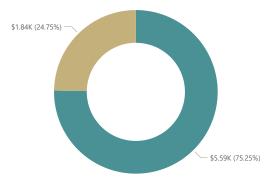
SCAL YEAR 202











Division Name

■ Street Maintenance

File Attachments for Item:

12. CONSIDERATION OF ADOPTION, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF RESOLUTION R-2223-112: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, INCREASING REIMBURSEMENT-REFUND ACCOUNT BY \$44,922.99 FOR REIMBURSEMENT OF THE JANUARY FRANCHISE ELECTION COST FROM OG&E AND APPROPRIATING THE SAME TO THE ELECTIONS ACCOUNT TO OFFSET FUTURE ELECTION COST FOR THE REMAINDER OF THE FISCAL YEAR.



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 03/14/2023

REQUESTER: Brenda Hall, City Clerk

PRESENTER: Brenda Hall, City Clerk

ITEM TITLE: CONSIDERATION OF ADOPTION, REJECTION, AMENDMENT, AND/OR

POSTPONEMENT OF RESOLUTION R-2223-112: A RESOLUTION OF COUNCIL OF THE CITY OF NORMAN. **INCREASING** REIMBURSEMENT-REFUND **ACCOUNT** BY \$44,922.99 **FOR** REIMBURSEMENT OF THE JANUARY FRANCHISE ELECTION COST FROM OG&E AND APPROPRIATING THE SAME TO THE ELECTIONS ACCOUNT TO OFFSET FUTURE ELECTION COST FOR THE

REMAINDER OF THE FISCAL YEAR.

BACKGROUND:

The OG&E Franchise Election was held on January 10, 2023. It is customary for the utility franchisee to reimburse the City for the cost of said election. As a result, Staff has received a check from OG&E for said expenses in the amount of \$44,922.99.

DISCUSSION:

Council has called an election for May 9, 2023, to submit a question to the registered voters to consider raising the Hotel Guest Room Tax from 5% to 8% for out of town travelers who stay in Norman hotels. Council has also discussed calling an election in June 2023 for the purpose of asking voters to consider a water rate increase to address critical water related needs.

The cost of elections has continued to increase over time and a city wide election now costs approximately \$45,000. As a result it is necessary to appropriate the funds received from OG&E to cover future election cost for the remainder of this fiscal year.

RECOMMENDATION:

Staff recommends the \$44,922.99 received from OG&E be receipted into Reimbursements-Refunds, Miscellaneous General (account 109-365251) and \$44,922.99 be appropriated from the General Fund Balance (account 10-29200) to Miscellaneous Services, Elections (account 10120195-44744).

Resolution

R-2223-112

A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, INCREASING REIMBURSEMENT-REFUND ACCOUNT BY \$44,922.99 FOR REIMBURSEMENT OF THE JANUARY FRANCHISE ELECTION COST FROM OG&E AND APPROPRIATING THE SAME TO THE ELECTIONS ACCOUNT TO OFFSET FUTURE ELECTION COST FOR THE REMAINDER OF THE FISCAL YEAR.

- § 1. WHEREAS, The OG&E Franchise Election was held on January 10, 2023, and it is customary for the utility franchisee to reimburse the City for the cost of said election; and
- WHEREAS, Staff has received a check from OG&E for said expenses in the amount of \$44,922.99; and
- § 3. WHEREAS, Council has called a Guest Room Tax election for May 9, 2023, and is proposing a water rate increase for June 13, 2023; and.
- § 4. WHEREAS, it is necessary to appropriate funds received from OG&E to cover the costs of elections for the remainder of the fiscal year.

NOW, THEREFORE, BE IT RESOLVED BY THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA:

§ 5. That the following receipt and appropriation be made for reasons as stated above:

Account Name	Losing Account	Gaining Account	Amount
Reimbursements-Refunds, Misc. General	n/a	109-365251	\$44,922.99
Miscellaneous Services, Elections	10-29200	10120195-44744	\$44,922.99

PASSED AND ADOPTED this 14th of March, 2023.

ATTEST;	Mayor	
City Clerk		



File Attachments for Item:

13. CONSIDERATION OF OPENING, CLOSING, ACCEPTANCE, APPROVAL, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF A PUBLIC HEARING TO CONSIDER SUBSTANTIAL AMENDMENT ONE TO CONTRACT K-2122-77, THE SECOND YEAR ACTION PLAN AND THE HOME AMERICAN RESCUE PLAN ALLOCATION PLAN AND BUDGET APPROPRIATIONS AS OUTLINED IN THE STAFF REPORT.



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 03/14/2023

REQUESTER: Lisa D. Krieg

PRESENTER: Lisa D. Krieg, CDBG Grants Manager

ITEM TITLE: CONSIDERATION OF OPENING, CLOSING, ACCEPTANCE,

APPROVAL, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF A PUBLIC HEARING TO CONSIDER SUBSTANTIAL AMENDMENT ONE TO CONTRACT K-2122-77, THE SECOND YEAR ACTION PLAN AND THE HOME AMERICAN RESCUE PLAN ALLOCATION PLAN AND BUDGET APPROPRIATIONS AS OUTLINED IN THE STAFF REPORT.

BACKGROUND:

The 2020-2024 Consolidated Plan approved in 2020 is a comprehensive planning approach to identify and address the needs of low-to-moderate income residents of Norman. Incorporated in the plan was a community profile of needs, goals and objectives related to housing, homeless persons, community development (including facilities, infrastructure, public services, and economic development), public and assisted housing needs, and other issues including fair housing and lead-based paint, and a strategic plan to address those needs.

On April 27, 2021, City Council and the U.S. Department of Housing and Urban Development (HUD) approved the Second Year Action Plan for the 47th Year Community Development Block Grant (CDBG) Program and the 2021 HOME Partnership Program (City of Norman FY 2021-2022) on July 30, 2021. All activities included in the proposed use of CDBG funds referenced the Second Year Action Plan Objectives and expected performance outcomes, and totaled \$940,869. All activities included in the proposed use of HOME Investment Partnership Program funds referenced the Second Year Action Plan Objectives and expected performance outcomes, and totaled \$431,097.

On March 11, 2021, President Biden signed the American Rescue Plan Act (ARPA) into law, which provides over \$1.9 trillion in relief to address the continued impact of the COVID-19 pandemic on the economy, public health, State and local governments, individuals, and businesses. To address the need for homelessness assistance and supportive services, Congress appropriated \$5 billion in ARPA funds to be administered through HOME to perform four activities that must primarily benefit qualifying individuals and families who are homeless, at risk of homelessness, or in other vulnerable populations. These activities include: (1) development and support of affordable housing, (2) tenant-based rental assistance (TBRA), (3) provision of supportive services; and (4) acquisition and development of non-congregate shelter units. The program described in this notice for the use of the \$5 billion in ARPA funds is

the HOME-American Rescue Plan or "HOME-ARP."

ARPA authorized HUD to allocate HOME-ARP funds to states, units of general local government, insular areas, and a consortia of units of general local government that qualified for an allocation of HOME funds in Fiscal Year (FY) 2021, pursuant to Section 217 of the Cranston-Gonzalez National Affordable Housing Act of 1990, as amended (42 U.S.C. 12701 et seq.) ("NAHA"). On April 8, 2021, HUD allocated HOME-ARP funds to 651 grantees using the HOME formula established at 24 CFR 92.50 and 92.60. As a HOME Investment Partnerships Participating Jurisdiction, the City of Norman was awarded a total of \$1,560,908.

The Department of Housing and Urban Development (HUD) has developed a multi-stage process to program and contract these funds. The first stage allowed Participating Jurisdictions (PJ) to immediately access up to 5% of the allowed 15% of Planning and Administration Funds. These funds were available for immediate use to allow for preparation of the HOME ARP Allocation Plan. On December 14, 2021, the City of Norman approved Contract K-2122-77 in the amount of \$78,045.40. These funds were utilized to offset staff costs in the development of the Allocation Plan.

As referenced above, the City of Norman developed the Second Year Action Plan as part of the application for the 2021-2022 HOME funding. To receive the remaining balance of the HOME-ARP funds, the City of Norman was required to engage in consultation and public participation processes to develop a HOME-ARP Allocation Plan that meets the requirements established in Notice CPD-21-10 and submit it to HUD as a substantial amendment to its Fiscal Year 2021 annual action plan (Second Year Action Plan). HUD is using the waiver and alternative requirement authority provided by ARPA to establish requirements for the HOME-ARP allocation plan in the Notice.

The Allocation Plan must describe how the City of Norman intends to distribute HOME-ARP funds, including how it will use these funds to address the needs of HOME-ARP qualifying populations. The Allocation Plan must include:

- A summary of the consultation process and results of upfront consultation:
- A summary of comments received through the public participation process and a summary of any comments or recommendations not accepted and the reasons why;
- A description of HOME-ARP qualifying populations within the jurisdiction;
- An assessment of unmet needs of each qualifying population;
- An assessment of gaps in housing and shelter inventory, homeless assistance and services, and homelessness prevention service delivery system;
- A summary of the planned use of HOME-ARP funds for eligible activities based on the unmet needs of the qualifying populations;
- An estimate of the number of housing units for qualifying populations the PJ will produce or preserve with its HOME-ARP allocation; and
- A description of any preferences for individuals and families in a particular qualifying population or a segment of a qualifying population.

All the above-required elements are included in the proposed City of Norman HOME-ARP Allocation Plan and will be incorporated after approval by the Norman City Council and HUD by a Substantial Amendment to the Second Year Action Plan. Amendment of the 2020-2024

Consolidated Plan is not required.

A Public Comment Period has been established for March 1, 2023 through March 20, 2023. All comments will be forwarded to HUD as part of the Allocation Plan. Once submitted, HUD has 45 days to review and accept the Allocation Plan or return to the City of Norman for additional information.

DISCUSSION:

The purpose of HOME-ARP funds is to provide homeless assistance and supportive services through several eligible activities. Eligible activities include acquisition and development of non-congregate shelter, tenant based rental assistance, supportive services, HOME-ARP rental housing development, administration and planning, and nonprofit operating and capacity building assistance.

HOME-ARP funds must assist people in HOME-ARP "qualifying populations", which include:

- Sheltered and unsheltered homeless populations
- Those currently housed populations at risk of homelessness
- Those fleeing or attempting to flee domestic violence or human trafficking
- Other families requiring services or housing assistance or to prevent homelessness
- Those at greatest risk of housing instability or in unstable housing situations

The HOME ARP Allocation Plan required that the City of Norman undertake a Consultation Process in conjunction with the development of the Allocation Plan. In accordance with Section V.A of the Notice (page 13), before developing its HOME-ARP allocation plan, at a minimum, the City of Norman was required to consult with:

- Continuums of Care serving the jurisdiction's geographic area,
- homeless service providers,
- domestic violence service providers,
- · veterans' groups,
- public housing agencies (PHAs),
- public agencies that address the needs of the qualifying populations, and
- public or private organizations that address fair housing, civil rights, and the needs of persons with disabilities.

Each of these entities were consulted either in person or as part of a scheduled meeting to allow for review of the opportunities and discussion. The details of these consultations are included within the Allocation Plan. To supplement the required consultations, the consultation process consisted of three main components.

 Homelessness Gaps Analysis and the accompanying document Bridging the Gap: Action Steps to End Homelessness developed by Homebase, Inc., for the Cleveland County CoC and the City of Norman. This process extended over a fourteen-month timeframe was completed (February 2022), prior to the HOME ARP award, the Gaps Analysis was updated and utilized in the compilation of data for the Allocation Plan. These two documents are combined and referred to as the Homebase Strategic Plan within this document.

- Developing and disseminating an online stakeholder survey in order to capture broad assessments of the community needs and areas for ARP allocation. The online survey was available for a two-week period in January 2023. The survey included both ARP program-specific questions and open-ended comment sections. Direct participation solicitation was made to over 120 organizations. The survey received twelve respondents, including those representing homeless services providers, the CoC, Fair Housing agencies, affordable housing developers, Public Housing Authority, domestic violence advocacy groups, and others.
- The third component was a virtual meeting of the Cleveland County CoC to discuss program parameters, to identify areas that the data does not fully address, and to help develop priorities. This meeting was held on January 10, 2023, and had 33 participants.

The gaps in services and programs to provide shelter, housing, and services were initially identified using the extensive stakeholder and public engagement that was undertaken during the development process of the Homebase Strategic Plan in 2022 and then updated for the HOME ARP Allocation Plan. To address the identified gaps, the specific level of need for unsheltered and sheltered households experiencing homelessness was determined by evaluating the number of unsheltered households utilizing the By Name List as well as Point In Time data, and the level of resources available to adequately house the families or individuals with permanent supportive housing and critical long-term supportive services to achieve housing stability.

The feedback that was collected centered on two eligible activities of the HOME ARP Program, Development of Affordable Housing and Supportive Services. The City of Norman plans to bring permanent supportive housing units into service for those experiencing chronic homelessness. It is anticipated that at least 12 units of permanent supportive housing will be developed.

Knowing these HOME-ARP funds are one time in nature, the City decided to invest everything into creating more housing for the most vulnerable. By creating a permanent supportive housing project, the City can address the overall need for physical units, but also with the single site model, and address other obstacles as well. For example, projects funded by the RFP must accept vouchers and must be low barrier/housing first. This ensures the chronically homeless can be housed.

A preference provides a priority for the selection of applicants who fall into a specific qualifying population (QP) or category (e.g., elderly or persons with disabilities) within a QP (i.e., subpopulation) to receive assistance. A preference permits an eligible applicant that qualifies for a PJ-adopted preference to be selected for HOME-ARP assistance before another eligible applicant that does not qualify for a preference. A method of prioritization is the process by which a PJ determines how two or more eligible applicants qualifying for the same or different preferences are selected for HOME-ARP assistance.

The City of Norman has established a preference for Category-One Homeless, with a subpopulation of Chronically Homeless. By prioritizing those with the highest acuity and creating housing for them, HOME-ARP will address the unmet need for single adults experiencing homelessness. Should the established preference of Homeless – Category 1 Subpopulation of Chronic Homeless not utilize all of the available units, other qualifying populations will be served.

In order to facilitate access to all eligible populations, housing developed with HOME ARP funds will accept referrals from multiple sources, including the Coordinated Entry. No single source of referral will be used. Criteria for referrals will be defined in the RFP process. The method of prioritization with be the length of time of homelessness.

After the approval of the HOME ARP Allocation Plan from HUD, the City of Norman will announce through a RFP process the opportunity to partner with affordable housing providers to leverage this funding to create more units. The units developed with HOME ARP funds will meet the City of Norman's Consolidated Plan Priorities of Improving and Preserving the Quality of Housing and Expanding Affordable Housing Opportunities.

The summary of the proposed funding is as follows:

	Use	Funding Amount	Percent of the Grant
21240303 44009	Supportive Services	\$ 100,000	
	Acquisition and Development of Non-Congregate Shelters	\$ 0	
	Tenant Based Rental Assistance (TBRA)	\$ 0	
21240303 46101	Development of Affordable Rental Housing; GC0094	\$ 1,226,908	
	Non-Profit Operating	\$0	0 %
	Non-Profit Capacity Building	\$0	0 %
21240303 42001	Administration and Planning	\$ 234,000	15 %
	Total HOME ARP Allocation	\$ 1,560,908	

RECOMMENDATION:

Staff recommends approval of Substantial Amendment One to Contract K-2122-77, the Second Year Action Plan for the 47th Year Home Investment Partnerships Program, as proposed, including acceptance of the HOME ARP Allocation Plan funding in the total amount of \$1,560,908 (\$78,045.40 under K-2122-77 has previously been accepted).

The revenue account of 212-333348 (Other revenue HOME ARP) has been established for this funding. Staff also recommends funds totaling \$1,560,908 be appropriated to the accounts as outlined above.

OMB Number: 4040-0004 Expiration Date: 11/30/2025

Application for Fede	eral Assistan	nce SF-424		
* 1. Type of Submission: Preapplication Application Changed/Corrected		* 2. Type of Application: New Continuation Revision		Revision, select appropriate letter(s): Other (Specify):
* 3. Date Received:		4. Applicant Identifier:		
			_	
5a. Federal Entity Identifier:			5	5b. Federal Award Identifier:
State Use Only:				
6. Date Received by State:		7. State Application	lder	entifier:
8. APPLICANT INFORMA	ATION:			
* a. Legal Name: City of	of Norman C	Oklahoma		
* b. Employer/Taxpayer Ide	entification Num	nber (EIN/TIN):		* c. UEI:
73-6005350			[M	MTD4M7LKSKJ4
d. Address:				
* Street1: 201	West Gray			
Street2:				
* City: Norm	man			
County/Parish:				
<u></u>	Oklahoma			
Province:				
	: UNITED ST	TATES		
* Zip / Postal Code: 7306	69-7108		_	
e. Organizational Unit:			_	
Department Name:			, [Division Name:
Planning and Commun	nity Develo	op		Grants
f. Name and contact info	ormation of pe	erson to be contacted on m	natte	ters involving this application:
Prefix:		* First Nam	ie:	Lisa
Middle Name: D				
* Last Name: Krieg			-	
Suffix:				
Title: CDBG Grants Ma	anager			
Organizational Affiliation:				
* Telephone Number: 405	5-366-5464			Fax Number:
*Email: lisa.krieg@n				

Application for Federal Assistance SF-424
* 9. Type of Applicant 1: Select Applicant Type:
C: City or Township Government
Type of Applicant 2: Select Applicant Type:
Type of Applicant 3: Select Applicant Type:
* Other (specify):
* 10. Name of Federal Agency:
Department of Housing and Urban Development
11. Catalog of Federal Domestic Assistance Number:
14.239
CFDA Title:
HOME Investment Partnerships Program
* 12. Funding Opportunity Number:
Formula Allocation
* Title:
HOME Investment Partnerships Program ARP
13. Competition Identification Number:
Title:
14. Areas Affected by Project (Cities, Counties, States, etc.):
Add Attachment Delete Attachment View Attachment
* 15. Descriptive Title of Applicant's Project:
HOME ARP Allocation Plan - City of Norman Oklahoma
Attach supporting documents as specified in agency instructions.
Add Attachments View Attachments

Application	for Federal Assistanc	e SF-424			
16. Congression	onal Districts Of:				
* a. Applicant	OK 004		* b. Pro	ogram/Project OK 00	4
Attach an addition	onal list of Program/Project C	congressional Districts if need	led.		
		Add	Attachment Delete	Attachment Vie	w Attachment
17. Proposed i	Project:				
* a. Start Date:	07/01/2023			* b. End Date: 06/30	/2030
18. Estimated	Funding (\$):				
* a. Federal		1,560,908.00			
* b. Applicant					
* c. State					
* d. Local					
* e. Other					
* f. Program Inc	come				.4
* g. TOTAL		1,560,908.00			
* 19. Is Applica	ation Subject to Review B	State Under Executive O	rder 12372 Process?		
	olication was made availab			ocess for review on	
	n is subject to E.O. 12372 I				
	n is not covered by E.O. 12		,		
Yes	plicant Delinquent On Any No de explanation and attach	Federal Debt? (If "Yes,"	provide explanation in a		5 DS_ 1 T T T T T T T T T T T T T T T T T T
		Add .	Attachment Delete	Attachment Vie	w Attachment
herein are tru comply with a subject me to ** I AGREE	ertifications and assurances	e to the best of my know ept an award. I am aware t trative penalties. (U.S. Coo	vledge. I also provide t hat any false, fictitious, le, Title 18, Section 100	the required assuran or fraudulent statem 1)	ces** and agree to ents or claims may
Authorized Re	presentative:				
Prefix:	Mr.	* First Name:	Larry		
Middle Name:					
* Last Name:	Heikkila				
Suffix:					
* Title: Ma	yor				
* Telephone Nu	mber: 405-366-5402		Fax Number:		
* Email: mayor	r@normanok.gov				
* Signature of A	uthorized Representative:				* Date Signed: 03/14/2023

OMB Number: 4040-0007 Expiration Date: 02/28/2025

ASSURANCES - NON-CONSTRUCTION PROGRAMS

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NOTE: Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the awarding agency. Further, certain Federal awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant, I certify that the applicant:

- Has the legal authority to apply for Federal assistance and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project cost) to ensure proper planning, management and completion of the project described in this application.
- Will give the awarding agency, the Comptroller General of the United States and, if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives.
- Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.
- Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.
- Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. §§4728-4763) relating to prescribed standards for merit systems for programs funded under one of the 19 statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).
- 6. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C.§§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation

- Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U. S.C. §§6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) §§523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. §§290 dd-3 and 290 ee- 3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §§3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and, (i) the requirements of any other nondiscrimination statute(s) which may apply to the application.
- 7. Will comply, or has already complied, with the requirements of Titles II and III of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or whose property is acquired as a result of Federal or federally-assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.
- Will comply, as applicable, with provisions of the Hatch Act (5 U.S.C. §§1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.

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- Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. §§276a to 276a-7), the Copeland Act (40 U.S.C. §276c and 18 U.S.C. §874), and the Contract Work Hours and Safety Standards Act (40 U.S.C. §§327-333), regarding labor standards for federally-assisted construction subagreements.
- 10. Will comply, if applicable, with flood insurance purchase requirements of Section 102(a) of the Flood Disaster Protection Act of 1973 (P.L. 93-234) which requires recipients in a special flood hazard area to participate in the program and to purchase flood insurance if the total cost of insurable construction and acquisition is \$10,000 or more.
- 11. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. §§1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. §§7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended (P.L. 93-523); and, (h) protection of endangered species under the Endangered Species Act of 1973, as amended (P.L. 93-205).
- Will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. §§1271 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.

- 13. Will assist the awarding agency in assuring compliance with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. §470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. §§469a-1 et seq.).
- 14. Will comply with P.L. 93-348 regarding the protection of human subjects involved in research, development, and related activities supported by this award of assistance.
- 15. Will comply with the Laboratory Animal Welfare Act of 1966 (P.L. 89-544, as amended, 7 U.S.C. §§2131 et seq.) pertaining to the care, handling, and treatment of warm blooded animals held for research, teaching, or other activities supported by this award of assistance.
- Will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. §§4801 et seq.) which prohibits the use of lead-based paint in construction or rehabilitation of residence structures.
- 17. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
- Will comply with all applicable requirements of all other Federal laws, executive orders, regulations, and policies governing this program.
- 19. Will comply with the requirements of Section 106(g) of the Trafficking Victims Protection Act (TVPA) of 2000, as amended (22 U.S.C. 7104) which prohibits grant award recipients or a sub-recipient from (1) Engaging in severe forms of trafficking in persons during the period of time that the award is in effect (2) Procuring a commercial sex act during the period of time that the award is in effect or (3) Using forced labor in the performance of the award or subawards under the award.

SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL	TITLE
	Mayor, City of Norman
APPLICANT ORGANIZATION	DATE SUBMITTED
City of Norman, OK	

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ASSURANCES - CONSTRUCTION PROGRAMS

OMB Number: 4040-0009 Expiration Date: 02/28/2025

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NOTE: Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the Awarding Agency. Further, certain Federal assistance awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant:, I certify that the applicant:

- Has the legal authority to apply for Federal assistance, and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project costs) to ensure proper planning, management and completion of project described in this application.
- Will give the awarding agency, the Comptroller General
 of the United States and, if appropriate, the State,
 the right to examine all records, books, papers, or
 documents related to the assistance; and will establish
 a proper accounting system in accordance with
 generally accepted accounting standards or agency
 directives.
- 3. Will not dispose of, modify the use of, or change the terms of the real property title or other interest in the site and facilities without permission and instructions from the awarding agency. Will record the Federal awarding agency directives and will include a covenant in the title of real property acquired in whole or in part with Federal assistance funds to assure non-discrimination during the useful life of the project.
- Will comply with the requirements of the assistance awarding agency with regard to the drafting, review and approval of construction plans and specifications.
- 5. Will provide and maintain competent and adequate engineering supervision at the construction site to ensure that the complete work conforms with the approved plans and specifications and will furnish progressive reports and such other information as may be required by the assistance awarding agency or State.
- Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.
- Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.

- Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. §§4728-4763) relating to prescribed standards of merit systems for programs funded under one of the 19 statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).
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- 11. Will comply, or has already complied, with the requirements of Titles II and III of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or whose property is acquired as a result of Federal and federally-assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.
- 12. Will comply with the provisions of the Hatch Act (5 U.S.C. §§1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.
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- 15. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. §§1451 et seq.); (f) conformity of

- Federal actions to State (Clean Air) implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. §§7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended (P.L. 93-523); and, (h) protection of endangered species under the Endangered Species Act of 1973, as amended (P.L. 93-205).
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- 18. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
- Will comply with all applicable requirements of all other Federal laws, executive orders, regulations, and policies governing this program.
- 20. Will comply with the requirements of Section 106(g) of the Trafficking Victims Protection Act (TVPA) of 2000, as amended (22 U.S.C. 7104) which prohibits grant award recipients or a sub-recipient from (1) Engaging in severe forms of trafficking in persons during the period of time that the award is in effect (2) Procuring a commercial sex act during the period of time that the award is in effect or (3) Using forced labor in the performance of the award or subawards under the award.

SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL	TITLE
	Mayor, City of Norman
APPLICANT ORGANIZATION	DATE SUBMITTED
City of Norman, OK	

SF-424D (Rev. 7-97) Back



HOME ARP

Allocation Plan

Department of Planning and Community Development

Public Comment Period March 1 – March 20, 2023

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DRAFT HOME-ARP Allocation Plan

Public Comment March 1, 2023 thru March 20, 2023

All comments and questions should be directed to:

Lisa Krieg, CDBG Grants Manager
Lisa.krieg@normanok.gov or 405-366-5464



Participating Jurisdiction (PJ): Norman Oklahoma Date: February 24, 2023

Introduction:

In September 2021, the U.S. Department of Housing and Urban Development announced the allocation of \$1,560,908 to the City of Norman, Oklahoma for a new grant called the Home Investment Partnerships Grant American Relief Plan (HOME-ARP). The purpose of HOME-ARP funds is to provide homelessness assistance and supportive services through several eligible activities. Eligible activities include acquisition and development of non-congregate shelter, tenant based rental assistance, supportive services, HOME-ARP rental housing development, administration and planning, and nonprofit operating and capacity building assistance.

HOME-ARP funds must assist people in HOME-ARP "qualifying populations", which include:

- Sheltered and unsheltered homeless populations
- Those currently housed populations at risk of homelessness
- Those fleeing or attempting to flee domestic violence or human trafficking
- Other families requiring services or housing assistance or to prevent homelessness
- Those at greatest risk of housing instability or in unstable housing situations

To receive funding, the City must develop a HOME-ARP Allocation Plan that describes the distribution of HOME-ARP funds and identifies any preferences for eligible activities. This plan will be submitted and approved by HUD. The development of the HOME-ARP Allocation Plan must also be informed through stakeholder consultation and public engagement. The following is the City's HOME-ARP Allocation Plan.

References to "the ARP" mean the HOME-ARP statute at section 3205 of the American Rescue Plan Act of 2021 (P.L. 117-2).

Consultation:

In accordance with Section V.A of the Notice (page 13), <u>before developing its HOME-ARP allocation plan</u>, at a minimum, the City of Norman must consult with:

- CoC(s) serving the jurisdiction's geographic area,
- homeless service providers,
- domestic violence service providers,
- veterans' groups,
- public housing agencies (PHAs),
- public agencies that address the needs of the qualifying populations, and
- public or private organizations that address fair housing, civil rights, and the needs of persons with disabilities.

State PJs are not required to consult with every PHA or CoC within the state's boundaries; however, local PJs must consult with all PHAs (including statewide or regional PHAs) and CoCs serving the jurisdiction.

Describe the consultation process including methods used and dates of consultation:

The City of Norman Planning and Community Development Department manages the HOME Entitlement Program and will administer the HOME ARP program as well. Until April of 2022, the City of Norman served as the Collaborative Applicant for the OK504 Cleveland County Continuum of Care and still serves on the Executive Steering Committee. For each of the consultation meetings and presentations, the HOME ARP program, guidelines, and eligible activities were presented along with the qualifying populations. During these meetings, the unmet needs of persons experiencing homelessness and those fleeing domestic violence were discussed. Emergency and transitional housing for these clients is very limited, often resulting in service providers utilizing motels to house these clients. Especially families. There is currently a critical need for affordable housing for individuals and families in Norman. Due to ongoing population growth in Norman and competition for affordable housing by the University of Oklahoma student population, coupled with the substantial rent increases and economic hardship due to the COVID-19 pandemic, the existing stock of affordable housing fails to meet the current demand. There are large-scale developments being constructed in Norman, but these are targeted to more affluent income brackets.

Cleveland County has a homeless population primarily concentrated in the Norman area that generally consists of single adults. A contributing factor is the Oklahoma State Mental Hospital, Griffin Memorial, which is currently located in Norman. The majority of the unsheltered and those utilizing the Emergency Shelter system are individuals who meet the definition of chronic homeless. As noted above, there is a lack of affordable housing and supportive services to help these individuals locate and maintain suitable housing. Consultation meetings have resulted in a consensus that more affordable housing, along with wraparound supportive services, are needed to address long-term housing stability for the chronically homeless population. Permanent supportive housing for the chronically homeless is critical to reducing the high percentage of chronic homelessness. Providers have had to use motel rooms to house clients that are unable to use (or ineligible for) local shelters. Available rental properties are frequently on the

market for a few days at the most, and many of the clients who are homeless or at risk of homelessness have no means to contact landlords quickly. With an increase in supportive services, these clients may be able to locate and move in more quickly. In addition, research has shown that supportive services lead to higher rates of success in maintaining housing. The City of Norman continues to work towards the development of more affordable housing and provides federal and state funding to developers of affordable housing. City of Norman staff continues to have conversations with affordable housing providers and developers in an effort to provide additional housing utilizing the ARPA funding the City of Norman received

The consultation process consisted of three main components.

- Homelessness Gaps Analysis and the accompanying document Bridging the Gap: Action Steps to End Homelessness developed by Homebase, Inc. for the Cleveland County CoC and the City of Norman. This process extended over a fourteen month timeframe, and was completed (February 2022) prior to the HOME ARP award. The Gaps Analysis was updated and utilized in the compilation of data for the Allocation Plan. These two documents are combined and referred to as the Homebase Strategic Plan within this document.
- Developing and disseminating an online stakeholder survey in order to capture broad
 assessments of the community needs and areas for ARP allocation. The online survey was
 available for a two-week period in January 2023. The survey included both ARP program-specific
 questions and open-ended comment sections. Direct participation solicitation was made to over
 120 organizations. The survey received twelve respondents, including those representing
 homeless services providers, the Continuum of Care (CoC), Fair Housing agencies, affordable
 housing developers, Public Housing Authority, domestic violence advocacy groups, and others.
- The third component was a virtual meeting of the Cleveland County Continuum of Care to discuss program parameters and to identify areas that the data does not fully address and to help develop priorities. This meeting was held on January 10, 2023 and had 33 participants.

HOMEBASE STRATEGIC PLAN:

In January 2021, the City of Norman embarked on a collaborative journey with the Cleveland County Continuum of Care and Homebase, Inc. to develop a Strategic Plan to address Homelessness within not only Norman but Cleveland County. This was a fourteen month process which included the development of a Gaps Analysis as well as a detailed Strategic Plan to begin to address the identified gaps. This document is attached as Exhibit A and hereinafter designated as the "Homebase Strategic Plan." The extensive consultation process utilized is the basis of the recommendations of the City of Norman HOME ARP Allocation Plan. The development of the Homebase Plan included over 500 citizen surveys, 22 interviews with service providers, and five focus groups of persons with lived experience. Over 125 people with lived experience participated in the five focus groups that were facilitated by Homebase and hosted by Food and Shelter, Inc., Salvation Army, Thunderbird Clubhouse, Inc., and the Women's Sanctuary operated by Catholic Charities. The Norman City Council and the OK504 Continuum of Care both accepted and adopted both the Gaps Analysis and the Strategic Plan in February 2022.

The primary effort for the Homebase Plan was conducted during 2021 and to allow for updating and supplementing this information, the City of Norman conducted an additional round of consultations beginning in Fall of 2022 and continuing into early 2023.

These additional consultations included the OK504 Continuum of Care, United Way of Norman, Women's Resource Center, Veterans Administration, SSVF, Metropolitan Fair Housing, Inc., Norman Affordable Housing Corporation, Inc., Norman Housing Authority, Norman CHDO 2015, Inc.

CLEVELAND COUNTY CONTINUUM OF CARE

A second component was to hold a specific meeting (January 10, 2023) with the Continuum of Care to present the HOME ARP program parameters and discuss how this opportunity could address the implementation of the Homebase Strategic Plan.



List the organizations consulted:

Agency/Org Consulted	Type of Agency/Org	Method of Consultation	Feedback
Norman Housing Authority	Public Housing Authority	In-Person Consultation	Consultation discussion prioritized the need for one bedroom units and appropriate supportive services. Survey response submitted indicated the priority need for affordable housing and supportive services. Identified that there is not enough inventory of rentals that allow housing vouchers and HOME funds should be utilized for new unit development. Provide direct outreach to landlords to assist development or improvement of new units. Better case management needed to facilitate housing stability.
Cleveland County	Services – Homeless	Presentation and	Availability of Affordable Housing
Continuum of Care	Continuum of Care –	discussion at the	remains the biggest obstacle in
OK504 CoC	Cleveland County, OK	January 2023 CoC Meeting and an online survey	achieving housing stability. There is a very large need for additional Case Management and Supportive Services to achieve and maintain housing stability.
United Way of Norman	Services-Homeless; Family; Education	In-Person Consultation	Participated in CoC meeting which discussed eligible populations and priority uses. Survey response submitted indicated the priority need for affordable housing and supportive services.
Metropolitan Fair	Services – Fair	Phone and email	Survey response submitted indicated
Housing	Housing	Consultation	the priority need for affordable housing and supportive services as well as increased access to fair housing services. Direct discussions and resource development regarding fair housing services and legal aid.
Heartland 211	Services - Referral	Phone and email Consultation	Participated in CoC meeting which discussed eligible populations and priority uses.

Logal Aid of Oklahoma	Services – Logal	Invited to	Participated in CoC mosting which
Legal Aid of Oklahoma	Services – Legal Services	participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses. Direct discussions and resource development regarding fair housing services and legal aid.
Norman Public Schools	Services - Education	Invited to participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses.
Norman Police Department	Services – Law Enforcement	In person consultation	Discussion was centered on the difficulties of providing support and assistance to the homeless population in Norman without criminalizing the population. Department needs greater assistance to develop homelessness protocol. Additional Co-responders with mental health, substance abuse or housing focus will provide for better incident outcomes and follow-up services. Better funding is needed to provide resources to the homeless population, including better services for mental health, substance misuse, and housing.
Central Oklahoma Community Mental Health Center	Services – Mental Health	Invited to participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses. Survey response submitted indicated the priority need for affordable housing and supportive services.
НИВ	Services - Mental Health Day Facility	Invited to participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses.
Food and Shelter, Inc.	Services – Homeless Service Provider (Families; Individual)	Invited to participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses.

Thunderbird Clubhouse,	Services – Mental	Invited to	Participated in CoC meeting which
Inc.	Health	participate in the HOME ARP Presentation to the CoC	discussed eligible populations and priority uses. Survey response submitted indicated the priority need for affordable housing and supportive services.
Women's Resource Center, Inc.	Services – Domestic Violence Provider	Invited to participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses.
Progressive Independence, Inc.	Services – Independent Living Center	Email solicitation of online survey	No Response
Mission Norman	Services – Faith Based	Invited to participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses.
Norman Housing Ministries	Services – Faith Based	In Person Consultation	Discussion prioritized the need for additional affordable housing as well as supportive services.
Norman CHDO 2015	Community Housing Development Organization	In Person Consultation	Discussion prioritized the need for additional affordable housing.
Salvation Army	Services – Homeless Services Provider (Families; Individual)	Invited to participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses.
Transition House, Inc.	Services – Mental Health	Invited to participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses.
Bridges of Norman	Services – Homeless Services Provider (Youth)	Invited to participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses.
Catholic Charities	Services – Faith Based Homeless Services Provider (Families; Individual)	Invited to participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses.

HOPE Community	Services – Mental	Invited to	Not enough housing to use with
Services	Health	participate in the HOME ARP Presentation to the CoC	vouchers. Participated in CoC meeting which discussed eligible populations and priority uses.
Pioneer Library System	Services – Public Library	Invited to participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses.
American Legion Post 88	Services - Veterans	Email solicitation of online survey	No response, multiple emails and phone messages left requesting meeting.
Envision Success, Inc.	Services - Veterans	Email solicitation of online survey	No response, multiple emails and phone messages left requesting meeting.
Dale K. Graham Foundation	Services - Veterans	Email solicitation of online survey	No response, multiple emails and phone messages left requesting meeting.
Veterans Administration	Services - Veterans	Invited to participate in the HOME ARP Presentation to the CoC	Not enough resources to meet the increased number of homeless or atrisk veterans with their pandemicrelated federal financial assistance ending. Funding needed to supplement homeless veterans transitional housing programs as well as increased operational costs.
Social Services for Veterans Families (SSVF)	Services - Veterans	Invited to participate in the HOME ARP Presentation to the CoC	Not enough resources to meet the increased number of homeless or atrisk veterans with their pandemicrelated federal financial assistance ending. Funding needed to supplement homeless veterans transitional housing programs as well as increased operational costs.
The Homeless Alliance	Services – Homeless Service Provider; HMIS Administrator	Invited to participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses. Provided data on sheltered counts and local unmet demand.
Oklahoma Department of Human Services	Services – General Welfare	Invited to participate in the HOME ARP Presentation to the CoC	Participated in CoC meeting which discussed eligible populations and priority uses.

Summarize feedback received and results of upfront consultation with these entities:

Through this consultation process the City of Norman identified early on that the traditional assessments and sources of data would not adequately demonstrate a modern GAP analysis for the identified Qualified Populations (QPs) for two specific reasons. First, traditional sources of data, such as the American Community Survey (ACS) or the Comprehensive Housing Affordability Strategy (CHAS) were most recently completed in 2019-20, prior to the onset of the Covid-19 pandemic. Second, the ongoing impact of the Covid-19 pandemic has negatively impacted more recent efforts to update this traditional data, including regional Point in Time (PIT) studies.

The second apprehension with current data points was the waiver to skip the 2021 unsheltered population counts. Attempting to develop an emergency service plan to address the needs of the increasing homeless and at-risk population while waiving the continued collection of data is problematic. Firstly, without consistent measurements any new data points have no baseline for change which can reasonably be relied upon.

What is more useful to establishing priorities within the Continuum of Care is data generated locally and what can effectively incorporate these new data sources including the By Name List and program services. Utilizing the availability of the data that was available from service providers and the Continuum of Care By Name List the Gaps Analysis from the Homebase Strategic Plan was updated and incorporated into this analysis.

Public Participation:

In accordance with Section V.B of the Notice (page 13), PJs must provide for and encourage citizen participation in the development of the HOME-ARP allocation plan. Before submission of the plan, PJs must provide residents with reasonable notice and an opportunity to comment on the proposed HOME-ARP allocation plan of **no less than 15 calendar days**. The PJ must follow its adopted requirements for "reasonable notice and an opportunity to comment" for plan amendments in its current citizen participation plan. In addition, PJs must hold **at least one public hearing** during the development of the HOME-ARP allocation plan and prior to submission.

PJs are required to make the following information available to the public:

- The amount of HOME-ARP the PJ will receive, and
- The range of activities the PJ may undertake.

Throughout the HOME-ARP allocation plan public participation process, the PJ must follow its applicable fair housing and civil rights requirements and procedures for effective communication, accessibility, and reasonable accommodation for persons with disabilities and providing meaningful access to participation by limited English proficient (LEP) residents that are in its current citizen participation plan as required by 24 CFR 91.105 and 91.115.

During the Development of the Allocation Plan an initial Public Hearing was held on December 14, 2022.

Date of public notice: 12/1/2022Date of public hearing: 12/14/2022

The HOME ARP Allocation Plan was also an Agenda Item at the Public Hearing held for the Community Development Block Grant Program

Date of public notice: 12/17/2022
Date of public hearing: 1/4/2023

The HOME ARP Allocation Plan Public Comment Period and Public Hearing at the Norman City Council Meeting for consideration of a Substantial Amendment to the Second Year (B21/M21) Action Plan.

• Date of public notice: 3/1/2023

• Public comment period: 3/1/2023 - 3/20/2023

• Date of public hearing: 3/14/2023

Describe the public participation process:

The First Public Hearing was held on December 14, 2022 with 23 in attendance. A presentation was provided which outlined the HOME ARP program and the opportunities that were available. A robust discussion was held whereas the consensus was that the Preservation or Development of Affordable Housing was the top priority and the Provision of Supportive Services where beneficial was the second.

In conjunction with the Community Development Block Grant Citizen Participation Process, the HOME ARP program was also discussed in detail at a Public Hearing on January 4, 2023. There were twelve people in attendance. Again the consensus of those in attendance was the same as the HOME ARP Public Hearing #1 with Affordable Housing and Supportive Services being considered crucial.

To fully inform the Norman City Council of the opportunities of the HOME ARP Program, a Study Session was held on February 28, 2023. At this Study Session a presentation was made to the Council detailing the Consultation Process, the program requirements, and the resulting Allocation Plan. This meeting is streamed on the City of Norman You Tube Channel and staff contact information is provided as part of the presentation which allows any citizen to contact and provide comments.

On March 14, 2023 a second HOME ARP Public Hearing was held in conjunction with the Norman City Council meeting. At this meeting the HOME ARP Allocation Plan was considered along with the Substantial Amendment to the 2020 Action Plan.

Evidence of public posting and appeals for input will be placed here after the Public Comment Period closes.

Describe efforts to broaden public participation:

The City of Norman encouraged public participation and has provided ample opportunity for the public to comment on this HOME ARP Allocation Plan. In addition to the multiple consultation meetings, the City notified the public of the public comment period in multiple ways. Our "Norman News" system broadcast the upcoming public comment period and public hearing to over 2,300 subscribers. Public notice was published in the Norman Transcript, a local newspaper of general circulation, on March 1, 2023. Public notice has also been published on the City of Norman website. The draft plan has been made available for review in the City of Norman Planning and Community Development office or on the City of Norman website.

As part of the HOME-ARP Allocation process, a Substantial Amendment to the 2021-2022 Second Year Action Plan will be submitted. Notice of the Substantial Amendment was published on February 25, 2023 in conjunction with the notification of Public Comment in the Norman Transcript. A public comment period for the Substantial Amendment is running concurrently with the HOME ARP Allocation Plan Public Comment period.

A copy of the Public Notice, draft HOME ARP allocation plan, and PowerPoint presentations were also posted on the City of Norman website. <a href="https://www.normanok.gov/your-government/departments/planning-and-community-development/grant-programs/home-arp-funding-and-community-development/grant-program

To provide the Norman City Council with specific information regarding the HOME ARP Allocation Plan prior to the Public Hearing, a Study Session was held on February 28, 2023. The PowerPoint Presentation is also located at the HOME ARP website listed above. At this Study Session a presentation was made to the Council detailing the Consultation Process, the program requirements, and the resulting Allocation Plan. This meeting is streamed on the City of Norman You Tube Channel and staff contact information is provided as part of the presentation which allows any citizen to contact and provide comments.

The City of Norman held a public hearing on March 14, 2023 to outline the HOME-ARP Allocation Plan and activities that may be funded through the plan. This meeting also included the Substantial Amendment to the Second Year Action Plan (2021-2022). The Staff presentation discussed the qualifying populations and the feedback that has been received through our consultation meetings and outlined the need to prioritize the chronically homeless and house this population with wraparound supportive services.

Members of the CoC were specifically invited to submit comments to the City of Norman. After HUD approval of the Substantial Amendment and the Allocation Plan, the City of Norman will notify the availability of the funding to interested parties invite them to participate in the planning and allocation process. The City of Norman continues efforts to provide public awareness for this program through continuing conversations with members of the public, service providers, affordable housing providers and developers.

Summarize the comments and recommendations received through the public participation process either in writing, or orally at a public hearing:

All comments have been accepted and were included within the development of the draft plan. Any comments made during the formal comment period will be accepted and included.

During the development of the Strategic Plan by Homebase multiple comments were documented and are summarized below:

"There are people in the community that are one paycheck away from losing their home. Lots of people are housing insecure and have lost their income, they have had nowhere to go and are reaching out for services they never imagined they would be reaching out for."

"I don't think I fully understand the nuances of the situation, and I feel like I don't know where and how to help because of competing narratives. I wish there could be some coalition building between the sides."

"I used to view homelessness as the problem of the person experiencing it. Working with people who are homeless has made me realize that it is our systems that fail to provide, and people become homeless as a result of these gaps."

"If we can find more affordable housing, we can offer more support to individuals."

"Norman has a college community. A lot of college students are taking over one bedrooms and parents pay for this, which is very expensive."

"Landlords are picky about who to rent to as one bedrooms are in high demand by college students. Landlords don't want to rent to homeless people."

"The landlord will be more receptive if social workers do not drop the ball and follow through. A bad landlord experience sticks and spreads around [and] makes other landlords reluctant. It is important that social workers understand this and know they are marketing representatives for the promises."

"Being in a college town, the low- to moderate income population is in great competition for student housing."

In addition with the consultation efforts to both update the Homebase Strategic Plan and for the development of this HOME ARP Allocation Plan, the following comments were recorded:

These comments will be added at the conclusion of the comment period on March 20, 2023.

Summarize any comments or recommendations not accepted and state the reasons why:

No comments or recommendations were intentionally dismissed. Some responses or recommendations derived either from the Homebase study, community surveys or through direct communication with area service providers did contain demonstrations of unmet need which are unable to be addressed given the restrictions on funding availability or individuals whom do not fall within the Qualified Population as defined by HUD. In these cases consideration is taken, and priority of funding is established as available.

Needs Assessment and Gaps Analysis:

In accordance with Section V.C.1 of the Notice (page 14), a PJ must evaluate the size and demographic composition of <u>all four</u> of the qualifying populations within its boundaries and assess the unmet needs of each of those populations. If the PJ does not evaluate the needs of one of the qualifying populations, then the PJ has not completed their Needs Assessment and Gaps Analysis. In addition, a PJ must identify any gaps within its current shelter and housing inventory as well as the service delivery system. A PJ should use current data, including point in time count, housing inventory count, or other data available through CoCs, and consultations with service providers to quantify the individuals and families in the qualifying populations and their need for additional housing, shelter, or services.

Homeless Needs Inventory and Gap Analysis Table

Homeless													
		Curre	ent Inve	ntory		Homeless Population			Gap Analysis				
	Far	nily	Adults	s Only	Vets	Family	H (at HH vets wast 1 (w/o		Family		Adults Only		
	# of Beds	# of Units	# of Beds	# of Units	# of Beds	HH (at least 1 child)		Vets	victim s of DV	# of Beds	# of Units	# of Beds	# of Units
Emergency Shelter	55	23	97	97	0								
Transitional Housing	5	1	12	12	0								
Permanent Supportive Housing	33	19	60	60	4								
Other Permanent Housing	52	24	21	21	0								
Sheltered Homeless						62	58	46	17				
Unsheltered Homeless						2	75	0	0				
Current Gap										12	4	50	50

Suggested Data Sources: 1. 2022 Point in Time Count (PIT); 2. 2022 Continuum of Care Housing Inventory Count (HIC); 3. Consultation

The Cleveland County Continuum of Care (OK504) in addition to conducting the HUD mandated Point in Time Counts utilizes a By-Name-List (BNL) to track persons and households that are experiencing homelessness in Cleveland County.

This BNL has been in existence since 2016 and is used extensively by the Coordinated Entry System and has been validated by the Built for Zero for its completeness and accuracy. Coordinated Entry System data provides useful context, including the By-name-list (BNL), which tracks individuals/heads of household who are in the homeless system of care and who need housing. The BNL includes intake and assessment data, including prioritization criteria (i.e., a ranking score) that helps match individuals and families to the housing and services that best serve their needs and helps to determine the order of priority when resources become available. Keeping the BNL up to date and looking at it over time, can help the CoC understand the need and any changes over time. See the table below of BNL data from January of each year from 2016 – 2020. One factor to note is that between 2019 and 2020, a data cleanup project removed inactive households from the list so some of the decrease seen in 2020 is the result of that data cleanup.

	January 2016	January 2017	January 2018	January 2019	January 2020	January 2021	January 2022
Singles	43	84	97	154	64	101	114
Families	2	3	0	6	0	6	4
Veterans	10	5	4	5	4	1	2

Housing Needs Inventory and Gap Analysis Table

Non-Homeless								
	Current Inventory	Level of Need	Gap Analysis					
	# of Units	# of Households	# of Households					
Total Rental Units	23,533							
Rental Units Affordable to HH at 30% AMI (At-Risk of Homelessness)	1,238							
Rental Units Affordable to HH at 50% AMI (Other Populations)	12,211							
0%-30% AMI Renter HH w/ 1 or more severe housing problems (At-Risk of Homelessness)		5,465						
30%-50% AMI Renter HH w/ 1 or more severe housing problems (Other Populations)		4,460						
Current Gaps			12,362*					

Suggested Data Sources: 1. American Community Survey (ACS); 2. Comprehensive Housing Affordability Strategy (CHAS) *The gap of 12,362 affordable units is the number of households in DP04 Selected Housing Characteristics 2021:5 Year Estimates Data Profiles that are paying more than 30% of household income for rent.

Population Experiencing Homelessness: Within Cleveland County, there are a total of 128 households which included a total of 197 persons that were experiencing homelessness with the January 2022 Point in Time Count. A documented 18 households, or 14% of total households, are family households (adults and children). The other 86%, or 110 households, are adult only households.

Victims of domestic violence – throughout 2022, there were a total of 319 unduplicated Domestic Violence (DV) victims served by emergency shelters and throughout 2022, there were 69 victims of domestic violence who experienced unsheltered homelessness at some point during the year.

Population At Risk Of Homelessness: During the COVID-19 pandemic, The Cleveland County District Court facilitated the use of the Emergency Rental Assistance Program to help avoid evictions. The facilitation included a designated work area for representatives of Legal Aid and the entities that were contracted to administer the Emergency rental Assistance Program. By allowing and supporting this partnership, evictions were greatly reduced during the COVID-19 Pandemic.

Currently, these dedicated resources are no longer available but the Legal Aid office participates in the Coordinated Case Management Conference to assist in occupancy issues for this population as well as providing legal assistance on tenant landlord issues to the general public.

Qualified Populations:

Definitions of the four <u>Qualified Populations (QP)</u> is described below. Refer to HUD CPD Notice 21-10 for a more complete definition:

- Homeless
 - Lacking fixed/regular and adequate nighttime residence
 - Nighttime residence is not designed for ordinary sleeping accommodations
 - Living in public/private shelter or commercial lodging
 - Will lose nighttime residence:
 - Within 14 days
 - Lacks support network needed to obtain new housing
 - Unaccompanied youth (under 25) or families with children which:
 - Defined by HUD as Runaway, DV, or McKinney-Vento
 - Not had lease or ownership in permanent housing within 60 days
- At-Risk of Homelessness
 - Annual income below 30% LMI (\$17,200 per individual; \$24,550 for household of four)
 - Not had lease or ownership in permanent housing within 60 days
 - Has been notified in writing of eviction
- Fleeing DV, Dating Violence, Stalking, or Assault
- Other populations
 - o Families requiring services or housing assistance to prevent homelessness
 - At greatest risk of homelessness
 - Annual income less than 30% AMI
 - Cost burden of 50% of household income
 - Veterans and families that include a veteran member

Describe the size and demographic composition of <u>qualifying populations</u> within the City of Norman boundaries:

Homeless as defined in 24 CFR 91.5

According to the 2022 Cleveland County Point in Time (PIT) count, there were 197 people experiencing homelessness in Cleveland County on January 27, 2022. The count includes people that are staying in temporary emergency shelters and those that are unsheltered. The 2022 PIT count reports that out of the 197 people who are experiencing homelessness in the county 28 are under 18 years old and 6 are age 18 to 24 and 163 are over the age of 24. The data shows that 74 are females, 121 are males. Regarding race, most of the people from the PIT count indicated that they are White (135), Black or African American (30) and American Indian (21), while the remaining 11 persons reported multiple races. The Cleveland County 2022 PIT count finds that of the 197 people experiencing homelessness, 65 are Severely Mentally III, 71 are Chronic Substance Abuser and 29 are Victims of Domestic Violence.

At Risk of Homelessness as defined in 24 CFR 91.5

Extremely low- and low-income individuals and families with children who are currently housed are often living from one check to the next with no savings or safety net to fall back on should an unexpected event or emergency occur. These households include all types, single person, small family, large family, and elderly. Characteristics include lack of education, lack of transportation, lack of adequate daycare, inadequate health insurance, drug or alcohol abuse or serious illness. These persons are at risk of losing their homes through foreclosure or eviction, and unless they have extended family or other support, they are at risk of needing to reside in a shelter or becoming unsheltered.

In Norman, the share of renter households that are moderately or severely cost burdened decreased from 5,670 in 2015 to 4,900 in 2020. The incidence of housing cost burdens is highest for unassisted renter households with the lowest incomes. In Norman, renter households with incomes of less than \$20,000 had the highest incidence of cost burden.

Households at-risk of homelessness include an estimated 6,295 households who are extremely cost burdened, paying over 50% of their income toward housing. Of those, 3,815 are renting households in the extremely low-income range (<30%). An estimated 4,900 LMI (<80%) renters are cost burdened at the 30% mark.

Fleeing, or Attempting to Flee, Domestic Violence, Dating Violence, Sexual Assault, Stalking, or Human Trafficking, as defined by HUD in the Notice

In Norman, the primary service provider for domestic violence is the Women's Resource Center, Inc. During consultation discussions they provided the following data for 2022. Staff operates three locations-DV Shelter, Rape Crisis Center (domestic violence forensic exams), and our Community Services Office. During 2022 we provided services to 319 victims of domestic violence-unduplicated. We

had 26 unduplicated individuals that were currently experiencing homelessness that came into shelter. Staff fielded 692 calls that were adult victims of domestic violence.

Other populations requiring services or housing assistance to prevent homelessness and other populations at greatest risk of housing instability, as defined by HUD in the Notice

In looking to better assess the at-risk population staff reached out to the current Emergency Rental Assistance providers for consultation related to the impending end of the multiple current Emergency Rental Assistance programs. These programs, which are locally administered by multiple non-profits have been able to access unprecedented levels of funding as a result of government intervention due to the COVID-19 Pandemic. With the scheduled sunset of multiple funding streams including the HUD CARES Act ESG/CDBG CV funding and the US Treasury Emergency Rental Assistance Program, preparations for a dramatic increase in housing assistance needs are being developed. Since 2020 over 12 million dollars of funding has been available and distributed within Cleveland County to assist households with immediate needs to maintain housing. Typical levels of funding from the Emergency Solutions Grant Program (HUD) and the Emergency Food and Shelter Program (FEMA) have historically been less than \$300,000 per year.

Like many communities in the United States, Norman is currently experiencing a shortage of affordable housing in addition to the homelessness crisis. As the availability of funding for housing prevention activities continues to shrink and affordability continues to decrease, the unmet needs of these qualifying populations will be required to be addressed through a combination of efforts not exclusive of new development with necessary subsidized support.

Identify and consider the current resources available to assist qualifying populations, including congregate and non-congregate shelter units, supportive services, TBRA, and affordable and permanent supportive rental housing:

Norman is in a unique position: the monthly number of households experiencing homelessness has remained relatively steady since 2018 and resources for rental assistance are at unprecedented high levels. However, available units for people exiting homelessness are at an all-time low. Households are being forced to search for housing for much longer and face a much tighter market. Affordable units and properties are in high demand from all income levels, giving landlords the ability to be more selective, often opting out of accepting any type of rental assistance, especially from people exiting homelessness. So even with unprecedented levels of federal investment in assistance for people experiencing homelessness, our system does not currently have enough dedicated and available units to move people into stable housing.

Currently, the availability of congregate and non-congregate shelter beds is extremely limited due to the number of beds available and the number of clients in need. To provide relief to the shortage, motel rooms are brought online during weather events to shelter homeless as funding is available. In addition the limited supply of family emergency shelter beds also requires the use of motel vouchers. This is not a sustainable plan for the future.

Affordable rental housing is extremely limited due to the sheer number of persons in need and the lack of affordable housing stock. Supportive services are limited in scope due to lack of funding and

lack of outreach resulting from the pandemic. The Norman Housing Authority operates the Housing Choice Voucher program, but the number of vouchers is insufficient to support the need. Current market rents are continually climbing and show no signs of leveling off.

Describe the unmet housing and service needs of qualifying populations:

Homeless as defined in 24 CFR 91.5

Sheltered and unsheltered homeless population in the Cleveland County Continuum of Care have an immediate and urgent need for housing and a path through which they can gain access to available housing units in the community and exit homelessness. This includes both appropriate, full service (with case management), emergency shelter beds as well as permanent housing and in many cases permanent supportive housing. Currently, the bulk of the emergency shelter beds available are only available at a low barrier seasonal, emergency shelter and may not help residents escape homelessness or address housing insecurity. During consultations, respondents also highlighted the following unmet service needs for the homeless population: legal aid, housing search and counseling, mental health services, outpatient health services, substance abuse treatment services, and comprehensive case management.

The Norman Housing Authority is a member of the CoC and works diligently to provide resources outside the usual Section 8 program for the provision of housing to this population. The Section 811 Mainstream Voucher Program awarded 100 vouchers to NHA with a homeless preference, Forty-Seven Emergency Housing Vouchers were issued in coordination with the CoC, and they are also providers of HUD VASH Vouchers. In addition to the noted shortage of affordable housing, the availability of case managers to provide and implement Housing Stability Plans is at a critically low level for the population that needs permanent supportive housing.

In Norman, the availability of rental housing that will participate in the Section 8 Program is very limited. Norman, being a university community has a steady supply of students in search of off campus housing with financial resources to utilize available units. A landlord that is faced with the decision to rent a unit to a student with financial backing from family versus providing rent to a homeless individual with a less than stellar rental history occurs daily in our community. To address overcoming the stigma that is prevalent within the rental management community regarding tenants that require Section 8 financial assistance, the City of Norman has partnered with the Norman Housing Authority to provide a Landlord Liaison that is providing valuable, accurate information to property owners regarding the benefits of utilizing the Section 8 program.

At Risk of Homelessness as defined in 24 CFR 91.5

The unmet needs for the populations at risk of homelessness and housing instability include resources for rental or utility deposit assistance and development of affordable rental housing units. This common theme was highlighted by multiple stakeholders citing the unmet need of sufficient supply of safe and affordable rental housing or emergency shelter. Inadequate supply of affordable rental housing inventory was not only highlighted in the initial Public Hearing, but it was also listed as the top unmet need of 38% of survey responses during the survey conducted for the Homebase Strategic Plan. 2015-2019 ACS data estimate city rental vacancy rates at less than three

percent. Housing counseling, financial literacy, and legal aid/landlord mediation for eviction proceedings were highlighted during our consultation as service needs for the at-risk of homelessness and greatest risk of housing insecurity.

The Norman Housing Authority manages 1,235 Housing Choice Vouchers, including 10 vouchers for disabled veterans referred through the HUD-VASH program, 47 Emergency Housing Vouchers, and 100 Section 811 Mainstream Vouchers. Over 60 units have been developed in Norman through the associated nonprofit Norman Affordable Housing Corporation. A waiting list of over 270 families indicate a strong need to increase participation in the Section 8 program. In addition, the production of additional rental housing units and rental assistance programs are warranted to reduce the Housing Authority's waiting list. The composition of the waiting list shows a need for primarily one bedroom units (45%) followed by two bedroom units (30%).

Fleeing, or Attempting to Flee, Domestic Violence, Dating Violence, Sexual Assault, Stalking, or Human Trafficking, as defined by HUD in the Notice

The Women's Resource Center Crisis provides 17 beds for victims in this population; however, the center noted a lack of affordable housing to survivors in need of permanent housing.

Other populations requiring services or housing assistance to prevent homelessness and other populations at greatest risk of housing instability as defined by HUD in the Notice

Households with household income less than or equal to 30% AMI with a cost burden greater than 50% are also at risk of homelessness. Based on the CHAS data, there are 3,815 renter households and 955 owner households in this category of potential risk.

Identify any gaps within the current shelter and housing inventory as well as the service delivery system:

Due to the ongoing COVID-19 pandemic, congregate shelters have had to significantly reduce capacity. While this situation has been alleviated somewhat, there is still a decrease of bed capacity which remains a gap. Some of the qualifying populations are utilizing motel or other noncongregate shelter options as funding is available. As the economy continues to improve the availability and economic impact of this type of housing is not sustainable. The available stock of this type of sheltering is limited and does not provide for housing stability.

The service providers in Norman work closely together to provide a continuum of services in response to needs identified through surveys of homeless persons and general observations of the providers. Providers in Norman are particularly strong in the areas of mental health services, employment training, and life skills training. There are not enough beds on a typical night to provide a safe, secure, accommodations for emergency shelter. This situation continues to be critical and is directly proportional to the need for increased permanent supportive housing capacity.

Current gaps within the shelter, housing inventory, and service delivery systems include: permanent low barrier shelter; sufficient case management to quickly resolve the household's homelessness; staffing to allow for a reasonable caseload; and permanent supportive housing.

As noted previously, the primary gap in the shelter and housing inventory is the availability of beds and units for adults with no children present. There is a need for over 100 more beds for this population.

There is a shortage of affordable housing in Norman. The availability of affordable housing units does not meet the needs of the qualifying population. There is a need for quality affordable housing units of multiple sizes in neighborhoods throughout the City. Housing inventory gaps include affordable 1-bedroom and 2-bedroom units. Vacancy rates of rental housing are extremely low and underscores the importance of creating and preserving affordable rental housing that can address the housing needs of the most vulnerable. Stagnating wages and rising house prices as noted in the City's most recent Consolidated Plan and Analysis of Impediments to Fair Housing report continue to serve as challenges to LMI households.

Under Section IV.4.2.ii.G of the HOME-ARP Notice, a PJ may provide additional characteristics associated with instability and increased risk of homelessness in their HOME-ARP allocation plan. These characteristics will further refine the definition of "other populations" that are "At Greatest Risk of Housing Instability," as established in the HOME-ARP Notice. If including these characteristics, identify them here:

The City of Norman does not plan to formally adopt a definition of "other populations, it will focus its HOME-ARP activities to assist homeless populations, those at-risk of homelessness, and persons fleeing or attempting to flee domestic violence, dating violence, sexual assault, stalking, or human trafficking.

Identify priority needs for qualifying populations:

The first priority need for Norman includes housing for single individuals who are experiencing homelessness to ease the congestion within the current shelter system as well as addressing unsheltered homelessness. Creating new affordable permanent supportive housing units for our chronically homeless population. The primary focus will be efficiency units and one-bedroom units. Identifying suitable housing and ongoing supportive services will be the focus of the HOME-ARP funds. The City of Norman will work with its affordable housing providers and work to forge new partnerships. Along with the production of new units, the City of Norman will also support the delivery of services for newly-housed populations. The target is a total of 12 units utilizing HOME ARP funding.

Explain how the PJ determined the level of need and gaps in the PJ's shelter and housing inventory and service delivery systems based on the data presented in the plan:

Housing inventory has been a recent topic for all income brackets within Norman as of late. To illustrate, an integral component of the Norman 2045 Comprehensive Plan is the preparation of a Housing Market Analysis and Affordability Strategy. This effort is being undertaken by the planning team of RDG-Garver. This will be a transformative document for future use but it is not at the stage to provide input for the HOME ARP Allocation Plan.

To determine the current need, the City of Norman looked at the community's total available housing resources for households experiencing homelessness and for households at risk of homelessness. To determine the level of need and gaps the City of Norman looked at both qualitative and quantitative measures. Data from the US Census, CHAS, 2022 CoC Point in Time Count, and 2022 Housing Inventory Count were used in partnership with feedback and on-the-ground insights from key stakeholders in the area.

The gaps in services and programs need to provide shelter, housing, and services were determined using not only the data sources identified above but extensive stakeholder and public engagement that was undertaken during the development process of the Homebase Strategic Plan in 2022 and then updated for the HOME ARP Allocation Plan. The level of need for unsheltered and sheltered households experiencing homelessness was determined by evaluating the number of unsheltered households utilizing the By Name List as well as PIT data, and the level of resources available to adequately house the families or individuals with permanent supportive housing and critical long-term supportive services to achieve housing stability. For households that are currently housed but have challenges maintain their home, the level of need was measured by the amount of inventory that had affordable, safe, and adequate living conditions and the number of renter households that are experiencing severe housing cost burdens.

The takeaways from data analysis and stakeholder input were incorporated into the needs assessment.

HOME-ARP Activities:

Describe the method(s)that will be used for soliciting applications for funding and/or selecting developers, service providers, subrecipients and/or contractors:

Pending HUD approval of its HOME-ARP allocation plan, the City of Norman will issue a Request for Proposals (RFP) for interested and experienced operators and developers of permanent supportive housing and/or affordable housing and qualifying supportive services. The goal of the RFP will be to develop at minimum 12 units of Permanent Supportive Housing. There will be a posted public notice of the RFP as well as direct solicitation to interested parties. Preceding the issuing of the RFP, the City will host an advertised pre-solicitation workshop to advise prospective applicants of the process, HOME and HOME ARP Guidelines and Regulations. Applicants will be scored according to a rubric including points for criteria such as project composition, developer experience and capacity, services offered, project readiness, and availability to leverage other local, state and federal funding. Application exhibits must demonstrate the financial feasibility of the projects, conformity to HOME ARP requirements, commitments for services and other funding sources, site control, compliance with land use regulations, and detailed construction plans. Applicants will be required to submit materials by a specific deadline. The entities selected through the request for proposal (RFP) will then be contracted to move forward with development, rehabilitation, supportive

services, referral, and administration of services for qualified populations and the city will provide oversight, monitoring, and reporting.

Describe whether the PJ will administer eligible activities directly:

The City of Norman expects to administer the planning and administration activities under the grant. However, administering the remaining eligible activities will be subject to the results of the request for proposal process to identify and contract with agencies, developers, and organizations to submit proposals and those selected for funding will administer activities and projects. Considerations will be given to existing partnerships including the Norman Housing Authority, Norman Affordable Housing Corporation, Norman CHDO 2015, and Continuum of Care members.

If any portion of the PJ's HOME-ARP administrative funds are provided to a subrecipient or contractor prior to HUD's acceptance of the HOME-ARP allocation plan because the subrecipient or contractor is responsible for the administration of the PJ's entire HOME-ARP grant, identify the subrecipient or contractor and describe its role and responsibilities in administering all of the PJ's HOME-ARP program:

The City of Norman did not provide administration funds to a subrecipient prior to HUD's acceptance of the HOME ARP allocation plan.

In accordance with Section V.C.2. of the Notice (page 4), PJs must indicate the amount of HOME-ARP funding that is planned for each eligible HOME-ARP activity type and demonstrate that any planned funding for nonprofit organization operating assistance, nonprofit capacity building, and administrative costs is within HOME-ARP limits.

Use of HOME-ARP Funding:

	Funding Amount	Percent of the Grant	Statutory Limit	
Supportive Services	\$ 100,000			
Acquisition and Development of Non- Congregate Shelters	\$0			
Tenant Based Rental Assistance (TBRA)	\$0			
Development of Affordable Rental Housing	\$ 1,226,908			
Non-Profit Operating	\$0	0 %	5%	
Non-Profit Capacity Building	\$0	0 %	5%	
Administration and Planning	\$ 234,000	15 %	15%	
Total HOME ARP Allocation	\$ 1,560,908			

Describe how the PJ will distribute HOME-ARP funds in accordance with its priority needs identified in its needs assessment and gap analysis:

The above table represents estimates of amount proposed for eligible activities based on our HOME ARP allocation. These funding amounts are subject to changes based on our request for proposal process and results.

The City of Norman expects to receive \$1,560,908 from HUD for HOME ARP. The City will retain 15% of the HOME ARP funding order to ensure rapid implementation of successful projects as well as monitoring to ensure their ongoing compliance. The City, through a competitive RFP process, will determine the individual activity and amount for each category of funding listed in the HOME ARP Allocation Table above. The City will allocate funds ranging from no dollars for a category and up to the maximum grant amount of \$1,560,908 allocated.

In funding supportive services, the City of Norman aims to increase housing stability and reduce levels of at risk homelessness for qualifying populations. Supportive Service activities will prioritize intense case management. Other services will include (but are not limited to):

- Mental Health Services
- Substance Abuse Treatment
- Outpatient Health Services
- Coordinated Service Linkage
- Outreach Services
- Employment Assistance and Job Training

Describe how the characteristics of the shelter and housing inventory, service delivery system, and the needs identified in the gap analysis provided a rationale for the plan to fund eligible activities:

The community needs and gap analysis in the Homebase Strategic Plan documented a gap in our homelessness response system for permanent housing with supportive services. In addition, the results from recent Point in Time Counts, Housing Inventory Charts, multiple program waiting lists, and the By Name List, all reinforce these results. This data illustrates that there is a significant need for dedicated permanent supportive housing for the unsheltered homeless population. Utilizing the HOME ARP funding to develop additional permanent supportive housing units can help address these needs directly.

Many of the individuals and families who receive assistance to mitigate homelessness or to flee violent circumstances require all-encompassing services that are population specific with their housing because of the compounding and complex challenges they face. Separate from their need for housing, there is a high need for assistance to reduce housing instability for these qualified populations, which includes mental health, job development, legal aid and other supportive services. There are gaps in our service delivery system for our homeless population who have high mental health needs, including and those who struggle with substance abuse. Based on the input received from service providers and the data collected, the City is allocating a portion of funding to supportive services.

HOME-ARP Production Housing Goals:

Estimate the number of affordable rental housing units for qualifying populations that the PJ will produce or support with its HOME-ARP allocation:

The City of Norman estimates that 12 units of permanent supportive housing will be produced utilizing the HOME ARP funding. The City will work with developers to understand what type of

funding resources can be leveraged with HOME ARP funding to increase the production of units, coordinating compliance with both HOME ARP regulations and what is required of those other funding resources.

The final production goals will be determined based upon the competitive RFP process allocating funding to specific projects after HUD approval of the HOME ARP Allocation Plan. The City will prioritize projects that are able to be developed quickly and that can operate with sufficient operating and supportive service dollars to meet the needs of tenants. Additionally, the City has the option to adopt the maximum per unit subsidy limit of other federal programs.

Describe the specific affordable rental housing production goal that the PJ hopes to achieve and describe how the production goal will address the PJ's priority needs:

The City of Norman plans to bring permanent supportive housing units into service for those experiencing chronic homelessness. As noted above it is anticipated that at least 12 units of permanent supportive housing will be developed.

Knowing these HOME-ARP funds are one time in nature, the City decided to invest everything in creating more housing for the most vulnerable. By creating a permanent supportive housing project, the City can address the overall need for physical units, but also with the single site model, address other obstacles as well. For example, projects funded by the RFP must accept vouchers and must be low barrier/housing first. This ensures the chronically homeless can be housed. The City of Norman is proud to be part of a community effort to end chronic homelessness.

The City of Norman expects to partner with affordable housing providers to leverage this funding to create more units. The units developed with HOME ARP funds will meet the City of Norman's Consolidated Plan Priorities of Improving and Preserving the Quality of Housing and Expanding Affordable Housing Opportunities.

Preferences:

A preference provides a priority for the selection of applicants who fall into a specific QP or category (e.g., elderly or persons with disabilities) within a QP (i.e., subpopulation) to receive assistance. A preference permits an eligible applicant that qualifies for a PJ-adopted preference to be selected for HOME-ARP assistance before another eligible applicant that does not qualify for a preference. A method of prioritization is the process by which a PJ determines how two or more eligible applicants qualifying for the same or different preferences are selected for HOME-ARP assistance. For example, in a project with a preference for chronically homeless, all eligible QP applicants are selected in chronological order for a HOME-ARP rental project except that eligible QP applicants that qualify for the preference of chronically homeless are selected for occupancy based on length of time they have been homeless before eligible QP applicants who do not qualify for the preference of chronically homeless.

Please note that HUD has also described a method of prioritization in other HUD guidance. Section I.C.4 of Notice CPD-17-01 describes Prioritization in CoC CE as follows:

"Prioritization. In the context of the coordinated entry process, HUD uses the term "Prioritization" to refer to the coordinated entry-specific process by which all persons in need of assistance who use coordinated entry are ranked in order of priority. The coordinated entry prioritization policies are established by the CoC with input from all community stakeholders and must ensure that ESG projects are able to serve clients in accordance with written standards that are established under 24 CFR 576.400(e). In addition, the coordinated entry process must, to the maximum extent feasible, ensure that people with more severe service needs and levels of vulnerability are prioritized for housing and homeless assistance before those with less severe service needs and lower levels of vulnerability. Regardless of how prioritization decisions are implemented, the prioritization process must follow the requirements in Section II.B.3. and Section I.D. of this Notice."

If a PJ is using a CE that has a method of prioritization described in CPD-17-01, then a PJ has preferences and a method of prioritizing those preferences. These must be described in the HOME-ARP allocation plan in order to comply with the requirements of Section IV.C.2 (page 10) of the HOME-ARP Notice.

In accordance with Section V.C.4 of the Notice (page 15), the HOME-ARP allocation plan must identify whether the PJ intends to give a preference to one or more qualifying populations or a subpopulation within one or more qualifying populations for any eligible activity or project.

- Preferences cannot violate any applicable fair housing, civil rights, and nondiscrimination requirements, including but not limited to those requirements listed in 24 CFR 5.105(a).
- The PJ must comply with all applicable nondiscrimination and equal opportunity laws and requirements listed in 24 CFR 5.105(a) and any other applicable fair housing and civil rights laws and requirements when establishing preferences or methods of prioritization.

While PJs are not required to describe specific projects in its HOME-ARP allocation plan to which the preferences will apply, the PJ must describe the planned use of any preferences in its HOME-ARP allocation plan. This requirement also applies if the PJ intends to commit HOME-ARP funds to projects that will utilize preferences or limitations to comply with restrictive eligibility requirements of another project funding source. If a PJ fails to describe preferences or limitations in its plan, it cannot commit HOME-ARP funds to a project that will implement a preference or limitation until the PJ amends its HOME-ARP allocation plan.

For HOME-ARP rental housing projects, Section VI.B.20.a.iii of the HOME-ARP Notice (page 36) states that owners may only limit eligibility or give a preference to a particular qualifying population or segment of the qualifying population if the limitation or preference is described in the PJ's HOME-ARP allocation plan. Adding a preference or limitation not previously described in the plan requires a substantial amendment and a public comment period in accordance with Section V.C.6 of the Notice (page 16).

Identify whether the PJ intends to give preference to one or more qualifying populations or a subpopulation within one or more qualifying populations for any eligible activity or project:

The City of Norman intends to preference Category 1- Homeless with a subpopulation of Chronic Homeless. The City of Norman will prioritize single adults who meet the criteria as and chronically homeless as having the greatest need for housing and supportive services. Those fleeing or attempting to flee domestic violence or human trafficking may receive direct referrals by providers to housing partners and would be considered a second highest priority. Local prioritization will comply with all requirements of 24 CFR 5.105(a). The Norman/Cleveland County Continuum of Care Coordinated Case Management Committee (CCM) operates the Coordinated Entry System and the By Name List for Cleveland County. Potential clients will be referred to the CCM for the standardized assessment tool through the coordinated entry process.

If a preference was identified, explain how the use of a preference or method of prioritization will address the unmet need or gap in benefits and services received by individuals and families in the qualifying population or subpopulation of qualifying population, consistent with the PJ's needs assessment and gap analysis:

The gap analysis revealed that the greatest need and the least number of resources were dedicated to single adults and especially those who are considered chronically homeless. Thus the City of Norman intends to preference Category 1- Homeless with a subpopulation of Chronic Homeless. By prioritizing those with the highest acuity and creating housing for them, HOME-ARP will address the unmet need for single adults experiencing homelessness. In order to facilitate access to all eligible populations, housing developed with HOME ARP funds will accept referrals from multiple sources, including the Coordinated Entry. No single source of referral will be used. Criteria for referrals will be defined in the Request for Proposal process. These recommendations will be based on whether someone can documented as chronically homeless (at least one year of homelessness and verification of a disability). Within this group, the current system will prioritize people based upon length of time homeless. The designation of this preference does not disqualify any individual that meets the Qualifying Population designation in 24 CFR 91.5 from accessing any HOME ARP unit.

Should the established preference of Homeless – Category 1 Subpopulation of Chronic Homeless not utilize all of the available units, other qualifying populations will be served. This would include those at risk of homelessness or those exiting jails, prisons, or institutions. In looking holistically at all the different funding sources to address Category 1 homelessness in the community– traditional and COVID, there are additional resources to assist all other qualifying populations - most notably, Tenant Based Rental Assistance, Continuum of Care, and Emergency Solutions Grant Program funds.

For those at risk of homelessness, the system is primarily utilizing Emergency Solutions Grant Program funding. For those feeling domestic violence, the system is accessing state and federal funding allocated for victims of domestic violence. For other populations where providing supportive services or assistance would prevent the family's homelessness, several funding sources are currently utilized by providers.

Referral Methods:

PJs are not required to describe referral methods in the plan. However, if a PJ intends to use a coordinated entry (CE) process for referrals to a HOME-ARP project or activity, the PJ must ensure compliance with Section IV.C.2 of the Notice (page10).

A PJ may use only the CE for direct referrals to HOME-ARP projects and activities (as opposed to CE and other referral agencies or a waitlist) if the CE expands to accept all HOME-ARP qualifying populations and implements the preferences and prioritization <u>established by the PJ in its HOME-ARP allocation plan</u>. A direct referral is where the CE provides the eligible applicant directly to the PJ, subrecipient, or owner to receive HOME-ARP TBRA, supportive services, admittance to a HOME-ARP rental unit, or occupancy of a NCS unit. In comparison, an indirect referral is where a CE (or other referral source) refers an eligible applicant for placement to a project or activity waitlist. Eligible applicants are then selected for a HOME-ARP project or activity from the waitlist.

The PJ must require a project or activity to use CE along with other referral methods (as provided in Section IV.C.2.ii) or to use only a project/activity waiting list (as provided in Section IV.C.2.iii) if:

- 1. the CE does not have a sufficient number of qualifying individuals and families to refer to the PJ for the project or activity;
- 2. the CE does not include all HOME-ARP qualifying populations; or,
- 3. the CE fails to provide access and implement uniform referral processes in situations where a project's geographic area(s) is broader than the geographic area(s) covered by the CE

If a PJ uses a CE that prioritizes one or more qualifying populations or segments of qualifying populations (e.g., prioritizing assistance or units for chronically homeless individuals first, then prioritizing homeless youth second, followed by any other individuals qualifying as homeless, etc.) then this constitutes the use of preferences and a method of prioritization. To implement a CE with these preferences and priorities, the PJ **must** include the preferences and method of prioritization that the CE will use in the preferences section of their HOME-ARP allocation plan. Use of a CE with embedded preferences or methods of prioritization that are not contained in the PJ's HOME-ARP allocation does not comply with Section IV.C.2 of the Notice (page10).

Identify the referral methods that the PJ intends to use for its HOME-ARP projects and activities. PJ's may use multiple referral methods in its HOME-ARP program.

In order to facilitate access to all eligible populations, housing developed with HOME ARP funds will accept referrals from multiple sources, including the Coordinated Entry. No single source of referral will be used. Criteria for referrals will be defined in the Request for Proposal process.

Describe whether the PJ intends to limit eligibility for a HOME-ARP rental housing project to a particular qualifying population or specific subpopulation of a qualifying population identified in section IV.A of the Notice:

Limiting eligibility for a HOME-ARP rental housing or NCS project is only permitted under certain circumstances.

• The City of Norman understands that as a participation jurisdiction it must follow all applicable fair housing, civil rights, and nondiscrimination requirements, including but not limited to those

requirements listed in 24 CFR 5.105(a). This includes, but is not limited to, the Fair Housing Act, Title VI of the Civil Rights Act, section 504 of Rehabilitation Act, HUD's Equal Access Rule, and the Americans with Disabilities Act, as applicable.

- The City of Norman may not exclude otherwise eligible qualifying populations from its overall HOME-ARP program.
- Within the qualifying populations, participation in a project or activity may be limited to persons with a specific disability only, if necessary, to provide effective housing, aid, benefit, or services that would be as effective as those provided to others in accordance with 24 CFR 8.4(b)(1)(iv). The City must describe why such a limitation for a project or activity is necessary in its HOME-ARP allocation plan (based on the needs and gap identified by the City of Norman in its plan) to meet some greater need and to provide a specific benefit that cannot be provided through the provision of a preference.
- For HOME-ARP rental housing, section VI.B.20.a.iii of the Notice (page 36) states that owners may only limit eligibility to a particular qualifying population or segment of the qualifying population if the limitation is described in Norman's HOME-ARP allocation plan.
- The City may limit admission to HOME-ARP rental housing to households who need the
 specialized supportive services that are provided in such housing. However, no otherwise
 eligible individuals with disabilities or families including an individual with a disability who may
 benefit from the services provided may be excluded on the grounds that they do not have a
 particular disability.
- The City of Norman does not intend to set limitations.

HOME-ARP Refinancing Guidelines:

If the PJ intends to use HOME-ARP funds to refinance existing debt secured by multifamily rental housing that is being rehabilitated with HOME-ARP funds, the PJ must state its HOME-ARP refinancing guidelines in accordance with 24 CFR 92.206(b). The guidelines must describe the conditions under with the PJ will refinance existing debt for a HOME-ARP rental project, including:

 Establish a minimum level of rehabilitation per unit or a required ratio between rehabilitation and refinancing to demonstrate that rehabilitation of HOME-ARP rental housing is the primary eligible activity

The City of Norman will not provide refinancing activities with HOME ARP funds.

- Require a review of management practices to demonstrate that disinvestment in the property has not occurred; that the long-term needs of the project can be met; and that the feasibility of serving qualified populations for the minimum compliance period can be demonstrated.
 N/A
- State whether the new investment is being made to maintain current affordable units, create additional affordable units, or both.

The City of Norman intends to invest HOME ARP funds to create additional affordable housing units.

- Specify the required compliance period, whether it is the minimum 15 years or longer.

 The compliance period will be determined by the sources of funding with the longest tenure being enforced. Compliance period will be 15 years minimum.
- State that HOME-ARP funds cannot be used to refinance multifamily loans made or insured by any federal program, including CDBG.

The City of Norman will not utilize HOME ARP funds to refinance any multifamily loans.

 Other requirements in the PJ's guidelines, if applicable: N/A



PUBLIC NOTICE

HOME Investment Partnerships Program American Rescue Plan (ARP) Allocation Plan for the City of Norman - Fiscal Year 2021-22, Second Year Action Plan Substantial Amendment.

2021-22, Second Year Action Plan Substantial Amendment.
HOME ARP Funds, Section 3205 of the American Rescue Plan of 2021, Public Law 117-2.
Public Hearing: March 14, 2023; Norman

Public Hearing: March 14, 2023; Norman City Council Meeting

Public Comment Period: March 1, 2023 -March 20, 2023 In accordance with the federal regula-

In accordance with the federal regulations, 24 CFR, Part 91, NOTICE is hereby given to residents of the City of Norman that a draft version of the HOME-American Rescue Plan (HOME-ARP) Allocation Plan will be available for review and a 15-day public comment period. During the comment period one Public Hearing will supplement the Public Hearing that was held on December 14, 2022 and the HUD required consultation process.

process. The City of Norman was awarded \$1,560,908 in HOME-ARP funds in a one-time allocation from the U.S. Department of Housing and Urban Development (HUD). 15% of these funds can be spent on program implementation and administration. The City of Norman anticipates using this full amount to fund its HOME-ARP programs between now and 2030, and plans to use the remaining \$1.327 million for other eligible activities This Allocation Plan is required by HUD for the City to receive federal HOME-ARP grant funds. The HOME-ARP Allocation Plan is a strategic plan detailing the allo-cation of funding to assist individuals or households who are experiencing homelessness, at risk of homelessness, and other vulnerable populations, by providing affordable housing, rental assistance, supportive services, and non-congregate shelter, to reduce homelessness and increase housing stability. The Allocation Plan defines the use of federal HOME-ARP grant funds to address these

A draft of the HOME ARP Allocation Plan for the participating jurisdiction of the City of Norman is now available for public review. The draft HOME ARP Allocation Plan is a requirement of the U.S. Department of Housing and Urban Development (HUD) for the use of \$1,560,908 of federal HOME ARP grant funds and provides an assessment of the shelter and housing inventory, needs, and gaps of the following population groups: homeless, at-risk of being homeless, persons and/or households experiencing, fleeing, or with a history of domestic violence, sexual assault, human trafficking, other vulnerable populations, and veterans, who are household members of the aforementioned groups. The Allocation Plan provides a pathway for the City of Norman to address the needs and gaps of these populations. After HUD reviews and approves the Allocation Plan, these federal funds will be made available through a Request for Proposals process for use by eligible entities within the City of Norman.

The draft Allocation Plan can be found at the following locations for your review:

On the City of Norman website here: https://www.normanok.gov/your-government/departments/planning-and-community-development/grant-programs/home-

A hard copy at the Planning Department Grants Office Monday through Friday from 8:00 am to 5:00 pm at 225 N. Webster, Norman, OK 73069. A hard copy is available upon request by

A nard copy is available upon request by contacting Lisa Krieg, CDBG Grants Manager at 405-366-5464 or lisa.krieg@normanok.gov.

The City of Norman appreciates all public input on the draft Allocation Plan. A summary of all citizen comments will be included in the substantial amendment to the Action Plan to be submitted to HUD on or before March 31, 2023. Public Comment can be submitted from March 1, 2023 through March 20, 2023 to Lisa Krieg, CDBG Grants Manger in one of the following ways: Via email to: lisa.krieg@normanok.gov.

Via email to: lisa.krieg@normanok.gov. In writing mailed to City of Norman PlanItem 13.

ning Department, PO Box 370, Norman, OK 73070 with attention to: Lisa Krieg. At the Public Hearing to be held on March 14, 2023 as indicated below:

Public Hearing
The City of Norman HOME Investment Partnership will hold a Public Hearing in conjunction with the regularly scheduled City of Norman City Council Meeting scheduled for March 14, 2023 at 6:30 pm. Meeting location is the City Council Chambers at 201 W. Gray, Norman, OK. Please contact the City Clerk?s office listed below for meeting details and to schedule to speak pertaining to this item. Anyone needing reasonable support to be able to participate in this meeting held by the City of Norman should contact the City Clerk at (405) 366-5406 or by email at brenda.hall@normanok.gov at least five days prior to the meeting date.

Item 13.

Item 13.

Advertising Receipt

The Norman Transcript

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City of Norman Planning & Comm

NT

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Norman , OK 73070

Acct #: 23167021 Ad #: 00511451

Phone: (405)366-5433

Date: 02/14/2023

Ad taker: JT Salesperson:

Classification: 147 Ad Notes:

Description	Start	Stop	Extras	Total
HOME ARP Public Comment	02/25/2023	02/25/2023	0.00	108.30

Ad Text: Payment Reference:

(Published in The Norman Transcript February 25, 2023, 1t)

PUBLIC NOTICE

HOME Investment Partnerships Program American Rescue Plan (ARP)

Allocation Plan for the City of Norman - Fiscal Year 2021-22, Second Year

Action Plan Substantial Amendment.

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Public Law 117-2.

Public Hearing: March 14, 2023; Norman City Council Meeting

Public Comment Period: March 1, 2023 - March 20, 2023

108.30 Total:

Tax: 0.00 Net: 108.30

0.00

Prepaid:

Total Due 108.30

City of Norman Planning & Comm

NT

PO BOX 370

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Total: 108.30

> Tax: 0.00 Net: 108.30

Prepaid: 0.00

Total Due 108.30



City of Norman & Norman/Cleveland County Continuum of Care

Homelessness Gaps Analysis

Prepared for the City of Norman and the Norman/Cleveland County Continuum of Care - by Homebase

September 2021



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EXECUTIVE SUMMARY

Norman and Cleveland County are facing a crisis on the streets, in our shelters, and in our neighborhoods. Homelessness affects all of us, our families, our neighbors, and our broader community. Rather than accept what is happening and continue to have hundreds of individuals and families suffer needlessly, we are choosing to dig deep to evaluate our current system, identify the needs and gaps within the system, and to develop recommendations to consider what resources can be brought to bear to improve our approach to homelessness.

Our community is lucky enough to have public entities, nonprofit providers, τ volunteers, policymakers, and business owners working together to e address the complex issues of homelessness every day. Despite all of the hard work, hundreds of people still live on our streets, unable to obtain stable housing. We recognize that we cannot resolve homelessness without addressing the system as a whole, including looking beyond the homeless system to our health care, housing, social welfare, and criminal legal systems.

In spite of the many challenges facing us right now, we believe we have an important opportunity to come together to take collective action to address homelessness. Through this Gaps Analysis, we set out to provide context for us to begin a community-wide conversation that will help us prioritize action steps that will lead us to the goal of making homelessness rare, brief, and one-time in the region.

Success will only be possible by working together and in partnership with people experiencing homelessness. We believe that all of Cleveland County can join in this effort, bringing compassion and courage to help our friends, family, and neighbors who are struggling to find and maintain home.

Darrel Pyle

City Manager

City of Norman, Oklahoma



INTRODUCTION

The City of Norman, in conjunction with the Norman/Cleveland County Continuum of Care (CoC), contracted with Homebase — a national technical assistance provider helping communities prevent and end homelessness — to perform a gaps analysis of the region's homeless system of care. The purpose of the gaps analysis is to evaluate the current system, including street outreach, shelter, and housing programs, and to identify existing system gaps. This report also includes recommendations designed to improve the homeless system of care and to provide opportunities to build upon current efforts to better meet the needs of people experiencing homelessness or who are precariously housed in the City of Norman and throughout Cleveland County. The gaps analysis also represents an important step toward understanding and addressing racial and ethnic disparities among the homeless population. The demographic analysis contained in this report is intended to inform policy decisions as the City works to address any systemic inequities and promote opportunity for all.

The homeless system of care in Cleveland County includes a variety of programs including shelter, street outreach, and housing programs designed to meet the needs of people experiencing homelessness or to prevent homelessness across the county. These efforts are multi-sector and supported by local, state, federal, and private funding sources. Additionally, there are other system partners serving people experiencing homelessness, including cities and nonprofit agencies, as well as mainstream programs that are not exclusively dedicated to serving people experiencing homelessness, but each provides significant support and resources in preventing and addressing homelessness. That so many agencies and partners across the community dedicate resources as part of the system of care reflects a common interest and commitment to ending and preventing homelessness in Cleveland County.

For purposes of this report, the best available data was utilized to determine where system gaps exist and to find areas where additional data is needed to improve services, guide planning, and track equity across the system of care. Because obtaining consistent quality data for people experiencing homelessness is one key gap identified in this evaluation, it is recommended that the CoC adopt a data quality plan for future data collection, performance evaluation, and monitoring. Despite the lack of consistent quality data, a number of gaps in the system were identified. This report outlines those gaps and recommends possible solutions to address them.

Within the Norman/Cleveland County area there are many individuals and key stakeholders who are extremely passionate about the issue of homelessness and its impacts on the region and who care about resolving homelessness in a way that positively impacts the community in which they live. However, there are also deep divides about the best course of action to accomplish that goal. This report endeavors to be transparent about conflicting feedback and identify areas where the existing tension may in fact impede efforts to address homelessness.

Over 85% of community survey respondents either agreed or strongly agreed that it is possible to significantly reduce homelessness in Cleveland County. Given that consensus, the process of identifying the gaps and considering potential solutions can help identify a path forward to provide housing and services to people experiencing homelessness and to improve conditions in the community that are most impacting area residents. This report can be a first step in fostering dialogue between all interested parties and begin the process of identifying the strategies and next steps that will advance collective action.



METHODOLOGY

Homebase carried out the Gaps Analysis for the Norman/Cleveland County Continuum of Care (CoC) between January and June 2021 to identify key gaps and needs to inform the City and CoC's plans to reduce and end homelessness. The methodology to complete this analysis relied on a combination of quantitative and qualitative data sources to determine existing resources and unmet needs. Quantitative methods used to assess the performance of the homeless system of care included collecting and analyzing data from housing and services providers and from annual Point-in-Time (PIT) counts of individuals experiencing homelessness in the region.

Most housing and service providers who receive public funding are required to enter client information into the Homeless Management Information System (HMIS) that includes data of client demographics, housing status, disabilities, and sources of income and non-cash benefits. HMIS data also serves as the chief source of information for tracking system performance such as the Department of Housing and Urban Development (HUD)-mandated System Performance Measures (SPMs) and the Longitudinal Systems Analysis (LSA). Local HMIS-participating housing and service providers within Cleveland County are Catholic Charities (Women's Sanctuary), the City of Norman, Food and Shelter, HOPE Community Services, the Oklahoma Department of Mental Health Substance Abuse Services, the Salvation Army, and Thunderbird Clubhouse. Data entered in HMIS by the Coordinated Entry System was also used in this analysis.

The Point-in-Time (PIT) count is a biennial census of sheltered and unsheltered persons in a CoC. PIT counts are conducted during a single 24-hour period in January and record demographic information about people experiencing homelessness. The Housing Inventory Count (HIC), an annual inventory of shelter beds dedicated to people experiencing homelessness and permanent housing beds dedicated to formerly homeless persons, is completed on the same date as the PIT count. Data collected as part of the most recent unsheltered PIT count (2020) and HIC (2021) were used in this analysis, as were past counts. Local planning documents and CoC policies and procedures and competition materials were also consulted to help assess the capacity of existing housing and services within the system.

To write the analysis, Homebase also relied on key qualitative data sources, including:

- Surveys administered by the City of Norman and the CoC and answered by more than 500 community providers, local residents, people with lived experience of economic insecurity and/or homelessness, and business representatives.
- Interviews with more than 22 stakeholders across Cleveland County, including housing and service providers, public officials, business representatives, and city staff members. (A list of organizations interviewed is in Appendix B)
- Focus groups, including individual adults experiencing homelessness, heads of households of families experiencing homelessness, and individuals and families with recent experiences of homelessness. (A list of locations where focus groups were held is in Appendix B)

Qualitative Data						
	500 surveys					
İ	22 interviews					
	5 focus groups					



In the surveys and during interviews, questions asked of the participants included:

- What causes economic insecurity and homelessness?
- What barriers exist to access and what resource gaps exist within the homeless system of care?
- What is the impact of homelessness on the community?
- What are the greatest needs for those experiencing homelessness and economic insecurity?
- What impact has the COVID-19 pandemic had on homeless service providers and individuals experiencing homelessness and economic insecurity?
- What are some possible solutions for homelessness?

An analysis of the homeless system of care would be incomplete without the direct perspective of individuals experiencing homelessness or those with recent experience of homelessness. Five focus groups were held with a diverse range of individuals with current or recent lived experience of homelessness, including heads of households of families experiencing homelessness. The focus groups were held at Food and Shelter, Thunderbird Clubhouse, the Salvation Army, and Catholic Charities. During the focus groups, clients discussed their experiences navigating the homeless system, the challenges of connecting with services or housing opportunities, and the impact of homelessness on their health and welfare. All focus groups were held virtually through Zoom video conferencing software with the assistance of the providers. In addition to the focus groups for persons with lived experience, a survey specifically designed for individuals with lived experience was administered by local providers and outreach teams. Over forty surveys were completed and collected.

An Advisory Committee, which helped organize and publicize focus groups for individuals with lived experience, provided feedback on initial qualitative data gathered. The Advisory Committee members included staff from First National Bank, Food & Shelter, the Homeless Alliance, the Norman Housing Authority (NHA), the Oklahoma Department of Mental Health Services, the Pioneer Library, the Salvation Army, Thunderbird Clubhouse, and the United Way.

The Gaps Analysis is based on the most recent data available at the time of the analysis. It represents the input of many stakeholders, including the private and public sectors, homeless service providers, local advocates, behavioral health experts, members of the business community, jurisdictional leaders from the City of Norman, and people with lived experience of homelessness.

Drawing on the extensive feedback, Homebase identified 7 key priority areas for action to be considered, each described in a separate section of the report below. These areas include:



Opportunities for Safe and Affordable Housing		Transportation to Employment, Services, and Shelter
2 Low-Barrier Housing and Day Services	8-8	Coordinated Prevention Assistance
3 Supportive Services	ılı.	6 Robust Data Collection and Analysis
Coordination and Communication	ation to Ensure E	iffective Use of Limited Resources

The Gaps Analysis is divided into two main sections. First, it provides a background section that presents an overview of Norman/Cleveland County and the homeless system of care, including a description of individuals currently experiencing homelessness in the County, and a review of existing housing stock. Second, it identifies the primary gaps and barriers that exist in the current homeless system and offers a summary of recommendations that outline potential solutions to each of the identified gaps as well as other challenges within the homeless system.

BACKGROUND

HISTORIC AND ECONOMIC CONTEXT

Cleveland County is the third most populous county in Oklahoma, with approximately 284,014 residents.¹ It is home to the cities of Etowah, Hall Park, Lexington, Moore, Noble, Norman, and Slaughterville. The largest city in Cleveland County is the City of Norman, which is home to 45% of county residents (124,880).² Favored for its proximity to the nearby state capitol of Oklahoma City, located 15 miles north, Norman is home to the main campus of the University of Oklahoma and to Griffin Memorial Hospital – Oklahoma Mental Health Center. As both a commuter city adjacent to the much larger Oklahoma City and a home to a large University influenced by student rental demands, Norman is challenged to house all residents and maintain the area as a safe affordable place to live.

Almost 80% of Cleveland County residents are White, with people identifying as two or more races comprising 6% of the population, Black and African Americans comprising 5.5% of the population, American Indian and Alaskan Natives comprising 5.3% of the population, and other races comprising less than 5% of the population. A little more than 9% of Cleveland County identifies as Hispanic/Latinx.

According to the U.S. Census Bureau, 94% of individuals over age 25 are high school graduates in the City of Norman. In the county of Cleveland, that number is 92% (the national and state equivalent is 88%). Forty-three percent of Norman residents have a bachelor's degree (compared to 33% for the

² Quick Facts, City of Norman, Oklahoma, U.S. Census Bureau.



¹ QuickFacts, Cleveland County, Oklahoma, U.S. Census Bureau.

County and 26% for Oklahoma).³ In addition to the high education rate, Cleveland County also has a higher median household income than the median for both the state of Oklahoma and the United States. Despite the high levels of education and median income, the City of Norman has a high poverty rate, especially in comparison to the County of Cleveland. In the City of Norman, close to 18% of residents live at or below the Federal Poverty Level (FPL). In the County of Cleveland, close to 12% of residents live at or below the FPL (nationally, 10.5% live at or below the FPL).⁴ The FPL for a family of 4 in 2021 is \$26,500⁵.

The median value of a home in the City of Norman is almost \$20,000 more than the County of Cleveland (\$183,200 and \$165,800 respectively) and \$30,000 more than the state of Oklahoma (at \$153,300). Housing prices in Cleveland County tend to be higher than other parts of Oklahoma, with the median price for an owner-occupied home at \$165,000 and the median gross rent \$956 per month (both based on 2019 data).⁶ In 2019, there were 117,000 housing units throughout the County, the majority of which were single units (87,000 or 74%). Seventy-one percent of Cleveland County housing units were three-bedroom or more (83,595). Less than 10% of housing units were one bedroom. Only 36% of housing units were renter-occupied.⁷ While the median gross rent was \$956 per month, 41% of rental units cost over \$1,000 per month.

The presence of the University of Oklahoma significantly impacts the economic circumstances in the City of Norman and surrounding areas. The University brings approximately 31,903 students⁸ to the community, which affects the rental market. At first glance, it may appear that Norman has a good cross-section of available units; however, the reality is that most of the units that are available for rental and ownership are not affordable to a renter or buyer whose monthly earnings are at or below 80% of the area median income (AMI). Many of the units that are available in that range may be in substandard condition.

The community survey, conducted during March and April 2021, had more than 450 responses from Cleveland County residents. Many respondents were homeowners who did not work regularly with people experiencing homelessness. Most respondents felt concerned either for themselves or for someone they knew about finding an affordable place to stay and believe that many people in their community are just one or two unforeseen circumstances away from becoming homeless in Cleveland County. A lack of affordable housing in the area was also a matter of concern among most respondents as well.

The City of Norman's housing needs include that a significant portion of lower income rental households are experiencing a housing cost burden greater than 30% of income and that lower income renters are also experiencing overcrowding and substandard housing conditions. The disparity between income and affordable housing has created a cost burden for a significant portion of the population impacting all household types. The U.S. Department of Housing and Urban Development (HUD) defines cost-burdened families as those who pay more than 30 percent of their income for housing and may have difficulty affording necessities such as food, clothing, transportation, and medical care. Fifty percent or more of income spent on rent is considered severely cost burdened and a major risk factor for falling into homelessness. Severe cost burden is considered a high risk for homelessness because a household that

⁸ University of Oklahoma Enrollment Summary Report, Fall 2020.



³ QuickFacts, Cleveland County, Oklahoma, U.S. Census Bureau.

⁴ QuickFacts, Cleveland County, Oklahoma, U.S. Census Bureau.

 $^{^{5}}$ <u>2021 Federal Poverty Levels</u>, Office of the Assistant Secretary for Planning and Evaluation.

⁶ QuickFacts, Cleveland County, Oklahoma, U.S. Census Bureau.

 $^{^{\}rm 7}\,\underline{\rm Selected}$ Housing Characteristics, Cleveland County, U.S. Census Bureau.

is paying a significant share of their income on housing expenses is less able to handle any unexpected financial demands that may arise such as a health crisis, automotive repair, employment loss, family crisis, etc. A cost burdened household is also less likely to have the financial savings in place to cover unexpected costs that arise.

Cost burden (30 to 50% of household income going to housing expenses), extreme cost burden (more than 50% of household income going to housing expenses), and no cost burden (less than 30% of household income going to housing expenses) are compared by racial/ethnic group to the city as a whole in the table below.

Table 1: Housing Cost Burden – Cleveland County

Housing Cost Burden	<=30%	30-50%	>50%	No / negative income (not computed)	% Population w/ >30% income paid for housing
Jurisdiction as a whole	30,560	6,550	7,070	750	32%
White	25,235	5,140	5,130	545	30%
Black / African American	800	285	535	15	51%
Asian	915	175	345	110	41%
American Indian, Alaska Native	780	245	310	0	42%
Pacific Islander	8	0	0	0	0%
Hispanic	1,535	340	450	10	34%

Nearly a third of the overall population of Cleveland County experiences a cost burden for housing, making this population vulnerable to homelessness. In addition, there are variations impacts of cost burden by race. While the population as whole (all combined) and White residents experience a cost burden for housing around a third of the time, Black or African American residents experience a cost burden for housing **over half of the time** and Asian or American Indian or Alaskan Native residents experience a cost burden for housing **approximately 40%** of the time.

HOMELESSNESS IN CLEVELAND COUNTY⁹

The principal data sources used to analyze the homeless population in Cleveland County include:

- 1. The Point-in-Time count, which provides an estimate of the size of the homeless population during a single 24-hour period in January.
- 2. Data entered in the Homeless Management Information System (HMIS) by homeless service providers operating an Emergency Shelter (ES), Transitional Housing (TH) Program, Rapid Rehousing (RRH) Program, or Permanent Supportive Housing (PSH) Program in the

⁹ All data in this report is taken from the Homeless Management Information System (HMIS) Annual Performance Reports (APRs) and/or the Point-in-Time count (PIT) and/or Housing Inventory Count (HIC) for Cleveland County unless otherwise specified. PIT count reports can be found on the HUD website at https://www.hudexchange.info/programs/hdx/pit-hic/data-reports/ HUD-funded programs use a definition of homelessness mandated by the U.S. Department of Housing and Urban Development (HUD). This definition counts people as homeless when they are living in a place not meant for human habitation (such as an encampment, tent, or vehicle), emergency shelters, or transitional housing. People who are doubled up or couch surfing are not counted as homeless under this definition.



- Norman/Cleveland County CoC in the form of Annual Performance Reports (APRs) and HUD System Performance Measures.
- Housing Inventory Count (HIC) Reports, which provide an inventory of housing conducted annually during the last ten days in January. The reports tally the number of beds and units available on the night designated for the count by program type, and include beds dedicated to serve individuals and families who are homeless.

Homelessness in the region impacts everyone in the community. Despite effective programs and dedicated providers, the number of people experiencing homelessness in the County continues to be an issue. As mentioned above, nearly one third of all residents experience a cost burden or severe cost burden for housing. When such a large proportion of income is spent on housing, any unexpected expense can lead to homelessness. Each year, hundreds of Cleveland County residents – neighbors, friends, and co-workers, etc. – experience a crisis that results in loss of housing, and once housing is lost, it is increasingly difficult to regain economic security and housing stability.

To best address the crisis and develop strategies to fit the unique needs of the region, it is vital to understand who is experiencing homelessness and to document the needs of this population. Every year, the Norman/Cleveland County CoC conducts a "Point in Time" (PIT) count provides a snapshot of the size and characteristics of the homeless population each year on a single day. CoCs are only required to count the unsheltered population every other year (although the Norman/Cleveland County CoC includes a count of unsheltered individuals every year). These January PIT counts can be evaluated over time to determine trends in the characteristics of people experiencing homelessness, which is a critical aspect for effective planning and performance management toward the goal of ending homelessness. In addition, data gathered from the programs who serve people experiencing homelessness provide greater insight into the number of people served in a year and help determine the effectiveness of these programs.

During the last full January PIT count in 2020, volunteers identified 266 men, women and children experiencing homelessness in Cleveland County, with 146 (55%) of those people living unsheltered on the streets, in vehicles, or in encampments (refer to Figure 1 below).

Figure 1: Total Population of People Experiencing Homelessness



The number of people experiencing homelessness in Norman/Cleveland County's January PIT count has increased since 2015 by 100%, from 133 individuals in 2015 to 266 individuals in 2020. In 2015, the majority of people experiencing homelessness were sheltered, but by 2020, more people experiencing homelessness in the County were living unsheltered. It is important to note that the increase in the overall homeless population over that five-year span is partially attributable to a more robust annual January PIT count. In 2018, the CoC engaged in more recruitment and training of volunteers to improve the accuracy of the January PIT count. However, improvements in the January PIT count methodology only account for a portion of the increase so other data must be incorporated to understand the trends (Figure 2).

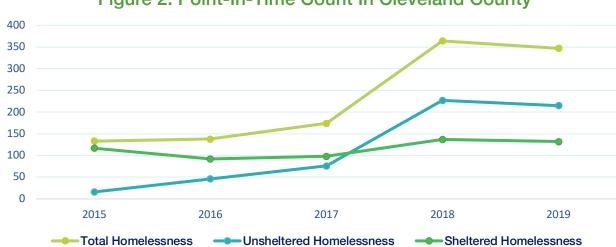


Figure 2: Point-In-Time Count In Cleveland County

In fact, the number of people who experience homelessness in the region over the course of a year is much higher than what is measured during the January PIT count. This is, in part, because the January PIT count only measures the number of people who are homeless on a given day and does not account for the many people who fall in and out of homelessness during the rest of the year. According to the Norman/Cleveland County's Homeless Management Information (HMIS) System Performance Measures (SPM, Measure 3.2), 427 people in Cleveland County enrolled at an emergency shelter or transitional housing program during FY2020, while many more Cleveland County residents experiencing homelessness were unable to access shelter or housing at all. Additionally, over the course of a year, many more children experience homelessness than are captured by the January PIT count. Under the federal McKinney-Vento Act, schools are also required to track students experiencing homelessness, using a definition of homelessness that also includes youth who are "doubled-up" (e.g., with multiple families sharing the same space).¹⁰

CAUSES OF HOMELESSNESS

People become homeless for many reasons, and the precipitating set of circumstances for any one individual or family may not be the same as for another. However, there are common risk factors and

¹⁰ 42 U.S.C. §11434(2)(B), McKinney-Vento Act, U.S. Department of Education.



conditions that exist. Common causes include the lack of affordable housing, economic insecurity, unemployment or inadequate wages, and mental or physical health conditions. Other causes can be a health crisis, substance use or domestic violence. Some individuals working low-wage jobs are unable to cover rent, maintain a mortgage, and/or other basic necessities. For those living paycheck-to-paycheck, a few reduced working hours, a costly medical bill, or an unexpected family emergency can be enough to result in a housing crisis. Older adults are struggling to find affordable housing even when they may be receiving Social Security or other mainstream benefits. Without meaningful and coordinated action, homelessness is likely to continue to grow in Norman/Cleveland County as more community members lose their housing and are unable to overcome the barriers to exit homelessness.

"There are people in the community that are one paycheck away from losing their home. Lots of people are housing insecure and have lost their income, they have had nowhere to go and are reaching out for services they never imagined they would be reaching out for."

— Local provider

Among residents who accessed the local homeless services system between 2017 and 2019 whose income was known, 60% reported having no income at all. Among adults who accessed homeless services during this period, only 14% reported earned income when presenting for services. In addition, 46% of residents reported having no sources of non-cash benefits, such as benefits from the Supplemental Nutrition Assistance Program (SNAP, formerly food stamps) or the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC), while 59% of residents reported having no sources of health insurance when presenting for services.

Among residents who accessed homeless services between 2017 and 2019, 27% were either survivors of domestic violence or were actively fleeing a domestic violence situation at the time they presented for services. Another 22% experienced chronic homelessness, *i.e.*, had experienced homelessness for at least one year and experienced a disabling condition; 7% were Veterans; and 7% were youth under the age of 25.

The lack of health coverage and public benefits is striking given the number of reported health conditions and disabilities among individuals accessing homeless services. Thirty percent of residents who received services reported having a mental health problem; while 16% reported having a physical disability; 15% reported having a chronic health condition; 12% reported experiencing a substance use disorder; 5% reported a developmental disability; and 1% reported experiencing HIV/AIDS (Figure 3).

Among all residents who accessed homeless services between 2017 and 2019 whose disability status
was known, 37% reported at least one disability, while 23% reported having multiple disabilities; and
15% reported experiencing three or more disabilities when presenting for homeless services.



Figure 3: Disability Status of Individuals Accessing Homeless Services



It is important to note that once an individual becomes homeless, it is difficult to overcome the barriers to exit homelessness. Among the 725 residents who accessed emergency shelter between 2017 and 2019 and whose prior living situation was known, 59% reported experiencing a homeless situation, including 27% who reported coming from an emergency shelter and 29% who reported coming from a place not meant for human habitation. In contrast, a lower share of residents who accessed emergency shelter reported coming directly from housing. Between 2017 and 2019, 34% of residents who accessed emergency shelter reported coming directly from temporary or permanent housing, including 9% who reported coming from a rental unit with no ongoing subsidy and 5% who reported owning a permanent housing unit with no ongoing subsidy. In addition, 7% of residents who accessed emergency shelter between 2017 and 2019 reported coming from an institutional setting, such as jail or prison, a substance abuse treatment facility or detox center, or a psychiatric facility or hospital.



FAMILY STATUS

Homelessness in Norman/Cleveland County is a crisis both seen and unseen. While the community's growing unsheltered population has been the source of significant public attention, homelessness for many other residents is more hidden. This can result in misunderstandings about the tremendous diversity of Norman/Cleveland County residents – families and individuals, young children, and seniors – who are experiencing the crisis of homelessness and require additional support to return to housing or to remain stably housed.



Between 2017 and 2019, according to statistics from HMIS, 1,861 residents in Norman/Cleveland County accessed the local homeless services system. Of those 1861, 304 residents accessed prevention programs seeking help to maintain their housing. Most of the residents who accessed the homeless system of care during this timeframe were single adults. Among residents who received services from 2017 to 2019, 79% were either single adults or couples without children; 20% were part of family households; and 1% were unaccompanied youth.

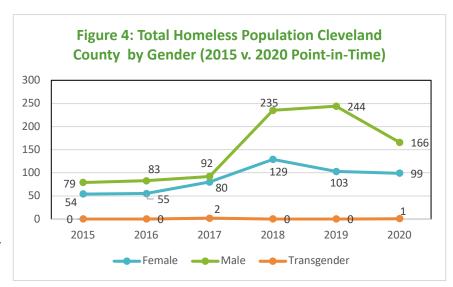
Homeless service providers in Norman/Cleveland County reported enrolling distinct populations in their respective programs over this three-year period. Among residents who accessed emergency shelter, 88% were single adults or couples, while 11% were part of family households, and 1% were unaccompanied youth. In contrast, a mere 39% of residents who accessed transitional housing were single adults or couples. Among residents who accessed rapid rehousing or permanent supportive housing, 66% and 54% (respectively) were single adults or couples, while 70% of residents who accessed prevention services were part of family households.

GENDER

Women comprised 50%¹¹ of Norman/Cleveland County's general population and 34% of the unsheltered homeless population in 2020, a dramatic increase from 24% in 2019. Women also comprised 42% of Norman/Cleveland County's sheltered population in 2020, an increase from 39% in 2019.

Men comprised 50% of Norman/Cleveland County's general population and 66% of the unsheltered homeless population in 2020, a decrease from 76% in 2019. Men also comprised 58% of Norman/Cleveland County's sheltered population, a decrease from 61% in 2019.

While no transgender or gender non-conforming persons were identified during the 2019 January PIT count, one transgender person was identified during the 2020 January PIT count.



Among the 1,584 adults who accessed homeless services in Norman/Cleveland County between 2017 and 2019 whose gender was known, 61% were male, 39% were female, and 1% were transgender or gender non-conforming. 12 While the preponderance of adults accessing homeless services in

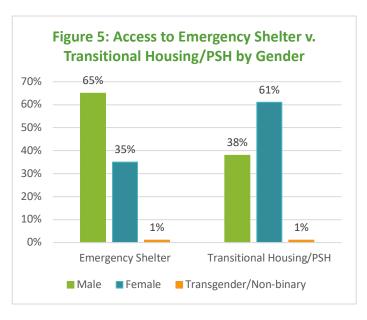
¹² Due to rounding, some percentages may not add up to 100%.



¹¹ U.S. Census Bureau, 2019 American Community Survey 5-Year Estimates.

Norman/Cleveland County during this period were single men, important distinctions were observed across different shelter and housing programs.

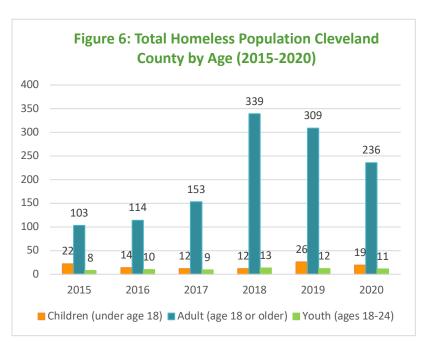
On the whole, the gender composition of residents accessing emergency shelter more closely mirrored that of the unsheltered population, while female residents formed a greater share of clients in transitional housing and permanent housing programs for formerly homeless persons. Among adults who accessed emergency shelter between 2017 and 2019, 65% were male, 35% were female, and 1% were transgender or gender non-conforming. In contrast, transitional housing and permanent housing programs for formerly homeless persons reported serving a larger share of female clients. Thirty-eight percent of adults who accessed transitional housing were male, while 61% were female and 1% were transgender or gender nonconforming.



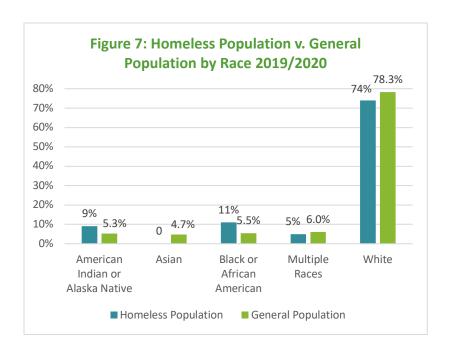
At the same time, permanent housing programs for formerly homeless persons in Norman/Cleveland County reported serving a more equal share of men and women. Forty-eight percent of adults who accessed rapid rehousing were male and 52% were female, while no transgender or gender non-conforming adults accessed rapid rehousing during this period. Similarly, 47% of adults who accessed permanent supportive housing were male, 52% were female, and 1% were transgender or gender non-conforming. Prevention programs, however, reported serving an even greater share of female residents: Among adults who accessed homelessness prevention services between 2017 and 2019, 37% were male, 62% were female, and 1% were transgender or gender non-conforming.

AGE

Adults over 18 comprise 93% of Norman/Cleveland County's homeless population. Adults over 18 but under 65 years old comprise 65% of the general population, with 21% of the population under 18 years of age and 14% of the population over 65 years of age. Children under 18 years of age comprise only 7% of the homeless population.







RACE AND ETHNICITY

Overall, Norman/Cleveland County has less diversity than the general population of the State of Oklahoma, with a slightly higher percentage of White residents (78%) living in the region compared to the state (74%). People of color in Norman/Cleveland County are represented at a lower percentage than the state as a whole.

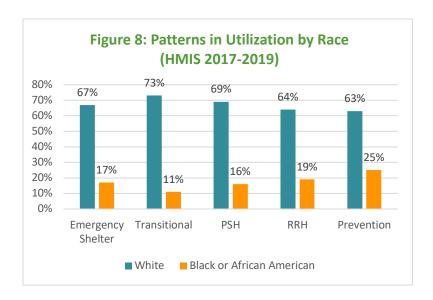
An analysis of the Norman/Cleveland County January PIT count revealed distinctions in how different racial groups are represented among the homeless population compared to the general population. While Asian and White individuals are underrepresented in the homeless population, Black or African Americans and Native Americans/Alaskan Natives are **two times more likely** to be in the homeless population than the general population (5.5% compared to 11% and 5.3% to 9% respectively).

In addition, the analysis identified important distinctions in how members of different racial groups experiencing homelessness in the County are represented in local shelter or housing programs. Due to the small sample size available for some populations, further research may be needed to confirm the representation of different racial groups among the County's homeless population. Nevertheless, the demographic analysis featured in this report demonstrates potential evidence of ongoing racial inequities in the local homeless system.

In general, the proportion of racial groups who accessed homeless services in Norman/Cleveland County in recent years mirrored the number of sheltered and unsheltered persons experiencing homelessness identified during the most recent January PIT count. Among the 1,752 residents who accessed homeless services between 2017 and 2019 whose race was known, 67% were White; 18% were Black or African American; 7% were American Indian or Alaska Native; 1% were Native Hawaiian or Other Pacific Islander; less than 1% were Asian; and 7% were persons of multiple races.

In addition, subtle but important distinctions in access to services among different racial groups were observed across different program types. While the percentage of White and Black or African American





persons who accessed emergency shelter (67% and 17%, respectively) closely mirrored the percentage of races accessing services across all program types, transitional housing programs and permanent supportive housing programs reported serving a higher share of White residents and a lower share of Black or African American residents.

Between 2017 and 2019, 73% of residents who accessed transitional housing were White, while 11% were Black. Similarly, 69% of residents who accessed permanent supportive housing during this period were White, while 16% were Black. In contrast, rapid rehousing and homelessness prevention programs reported serving a lower share of White residents and a higher share of Black residents. Among residents who accessed rapid rehousing between 2017 and 2019, 64% were White while 19% were Black. Similarly, 63% of Norman/Cleveland County residents who accessed homelessness prevention programs during this period were White while 25% were Black.

Among the 1,751 residents who accessed homeless services in Norman/Cleveland County between 2017 and 2019 whose ethnicity was known, 7% were Hispanic or Latino while 93% were Non-Hispanic or Non-Latino. While lower rates of Hispanic or Latino residents accessed emergency shelter (6%) and permanent supportive housing (5%) during this period, transitional housing, rapid rehousing, and homelessness prevention providers reported serving higher rates of Hispanic or Latino residents (14%, 8% and 13%, respectively).

CHRONIC HOMELESSNESS

Individuals or heads of households experiencing homelessness for a year or longer who also experience at least one disabling condition are considered chronically homeless. At initial presentation at an emergency shelter, individuals self-report their chronic status. Once they are assessed and matched for CoC-funded permanent housing, their chronic homeless status is verified. Among residents who accessed homeless services between 2017 and 2019, 22%, or 161 persons, were identified as chronically homeless. While the percentage of residents accessing homeless services who were identified as chronically homeless has been stable since 2017, the number of residents experiencing chronic homelessness has steadily increased in recent years. Over the course of three consecutive 18-



month periods from 2017 to 2021, 74 (2017–2018), 128 (2018–2019), and 134 (2020–2021) residents who accessed homeless services in Cleveland County were identified as chronically homeless.

Within the Norman/Cleveland County homeless system of care, there were 116 permanent supportive housing beds available for residents experiencing chronic homelessness in 2020. However, analysis of the utilization of available housing and services throughout the system of care shows that this is inadequate. There is a clear pattern of chronically homeless households utilizing housing and services designed for households with less severe needs and lower vulnerability suggesting that they are being underserved and are less likely to move out of homelessness and achieve stability. This suggests an urgent need for improved matching and additional interventions capable of addressing the needs of individuals and families who are experiencing long-term homelessness.

Among residents who accessed emergency shelter between 2017 and 2019 whose chronic homeless status was recorded, 33%, or 124 persons, were identified as chronically homelessness, suggesting a need for additional permanent supportive housing opportunities. In addition, 11% of residents who accessed transitional housing and 18% of residents who accessed rapid rehousing were identified as chronically homeless during this period. It is unclear whether these individuals are opting for or are being referred to these programs that are characterized by a shorter length of stay and fewer supportive services, but this trend suggests a need for further investigation and supports the conclusion that additional permanent supportive housing is needed.

It is worth noting that a significant number of residents who accessed homeless services in Norman/Cleveland County in recent years were of indeterminate chronic homeless status. Among the 1,861 residents who accessed homeless services between 2017 and 2019, 1,123 did not have their chronic homeless status identified in the system. The rate of residents who accessed emergency shelter whose chronic homelessness status was unknown has been particularly high: only 25% of residents who accessed shelter between 2017 and 2019 had their chronic homeless status identified. Given the limitations in data quality, it is important to stress that the actual percentage of residents accessing homeless services who are chronically homeless may be higher.

In addition, there are few reliable estimates of the rate of chronic homelessness among the population of unsheltered residents who do not access homeless services. The annual Point-in-Time (PIT) count captures information on the number of chronically homeless residents in emergency shelter and unsheltered situations and is typically used by federal and state funders and local policymakers as a key indicator. However, Norman/Cleveland County has reported that 100% of residents in emergency shelter and unsheltered situations at the time of the 2018, 2019, and 2020 January PIT counts were experiencing chronic homelessness. While the rate of chronically homeless residents who access emergency shelter may be higher than the 33% reported by HMIS-participating homeless service providers, the notion that all residents in emergency shelter and unsheltered situations would be experiencing chronic homelessness seems improbable and inconsistent compared to other data reviewed and stakeholder reports. A reevaluation of January PIT count methodology with respect to the chronic homeless status of residents in emergency shelter and unsheltered situations, including a review of data entry and data quality requirements for HMIS-participating homeless service providers, are likely needed to improve local

¹³ Data on the chronic homeless status of residents in permanent housing programs has been more complete. Seventy-four percent of residents who accessed rapid rehousing between 2017 and 2019 were identified as either chronically homeless or not chronically homeless, while permanent supportive housing programs, which limit participation to chronically homeless households, were able to determine the chronic homeless status of 91% of participants between 2017 and 2019.



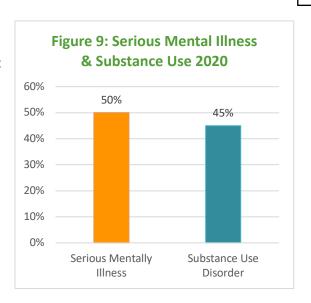
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understanding of the scope of chronic homelessness in Norman/Cleveland County. This is particularly important given that the data analyzed shows that some households experiencing chronic homelessness are currently being underserved. Understanding the level of need will allow policymakers and the CoC to make informed decisions.

BEHAVIORAL HEALTH

In 2020 of the 266 people experiencing homelessness, 50% were identified as having a serious mental illness, a substance use disorder, or both:

- 132 had a serious mental illness
- 120 had a substance use disorder



Thirty-seven percent of Norman/Cleveland County residents who accessed homeless services in recent years reported experiencing a disability. An analysis of HMIS data suggests a particular need for sustained behavioral health support for residents experiencing homelessness.

Among the 1,034 residents who accessed homeless services between 2017 and 2019 and whose disability status was known, 30% reported experiencing a mental health problem; 16% reported experiencing a physical disability; 15% reported experiencing a chronic health condition; 12% reported experiencing a substance use disorder; 5% reported experiencing a development disability; and 1% reported experiencing HIV/AIDS.

In addition, a significant percentage of residents who accessed homeless services between 2017 and 2019 reported experiencing more than one disability. Twenty-three percent of residents who accessed services during this period reported experiencing at least two disabilities when they accessed homeless services, while 15% reported experiencing at least three disabilities.

Moreover, a large portion of residents who accessed less-intensive interventions such as emergency shelter and transitional housing reported experiencing a disability. Between 2017 and 2019, 36% of residents who accessed emergency shelter reported experiencing a disability, while 23% of residents who accessed transitional housing during this period reported experiencing a disability, suggesting that large numbers of residents experiencing homelessness are in need of robust and ongoing health and behavioral health services.

As with the chronically homeless population, a significant number of residents who accessed homeless services in recent years did not have an identified disabled status. Among residents who accessed homeless services between 2017 and 2019, 44% lacked an identified disabled status. Among residents who accessed emergency shelter during this period, 54% did not have an identified disabled status on file. As a result, it is possible that the percentage of residents with a disability who accessed homeless services in recent years may be higher than 37%.

Despite these limitations, HMIS represents the preferred source of information on homeless residents with mental health conditions. Significant fluctuations in the rate of homeless adults with a mental health



condition observed during the 2019 and 2020 January PIT counts raise questions about their accuracy. For example, 21% of residents in emergency shelter at the time of the 2019 January PIT count reported experiencing a mental health condition; by 2020, 75% of residents in shelter reported a mental health condition. Similarly, 71% of residents who were unsheltered at the time of the 2019 January PIT count reported experiencing a mental health condition; by 2020, the rate of unsheltered residents who reported a mental health condition had dropped to 51%.

While external factors may account for some or all of these fluctuations, a reassessment of PIT methodology is recommended to ensure that the scope of health and behavioral health needs among residents experiencing homelessness in Norman/Cleveland County is recorded. In addition, an analysis of data entry practices and increased training for HMIS-participating homeless service providers may reduce the rate of residents experiencing homelessness in Norman/Cleveland County whose disabled status is unidentified.

THE CONTINUUM OF CARE IN CLEVELAND COUNTY

Norman/Cleveland County CoC has a system with passionate and impactful providers dedicated to addressing homelessness. The City of Norman, the City of Moore, and the surrounding Cleveland County area constitute the Norman/Cleveland County CoC. While resources are limited, the programs work diligently to divert people from homelessness wherever possible and help connect households experiencing homelessness to housing and other resources as quickly as possible.

The Norman/Cleveland County CoC provides centralized countywide leadership and coordination for the system of care, including through the designation of a Coordinated Entry System operator and Administrative Entity for the CoC. The City of Norman serves in both of those functions and helps to facilitate the CoC meetings. (The City of Norman is not a direct services provider.)

The CoC Steering Committee is comprised of 41 members with an elected Executive Committee composed of 20 members plus at-large seats. They have a Governance Committee comprised of the elected leadership of the CoC and key funded agencies as well as a Data Committee that was designed to help the CoC improve data quality and evaluate and monitor system performance.

Although a Housing Liaison and an Outreach Case Manager were recently added, historically the City of Norman has operated with one full-time permanent staff person dedicated to homelessness. With this staff, the City of Norman:

- Coordinates weekly CoC Coordinated Entry case conferencing meetings to discuss people
 who have entered the system of care and match them with available housing and services
 through collaborative discussion, including prioritizing those most in need according to the
 CoC's chosen assessment tools and prioritization criteria. There are approximately 12-15
 organizations that participate in weekly meetings.
- Coordinates the CoC Board, which meets monthly to discuss the needs of families and
 individuals experiencing homelessness, to discuss various topics including the regulatory
 requirements of the funding, other funding opportunities, policy development and revisions,
 collaborative opportunities for work within the community, outreach and Coordinated Entry
 work, and data, including system performance measures and other HUD reporting. All 20
 member organizations participate monthly.



- Supports the City of Norman's Ad Hoc Committee to Address Homelessness, which was formed to focus on developing a plan and strategies for addressing homelessness in the region.
- Administers tenant-based rental assistance (TBRA) to CoC-approved clientele
- Coordinates several other initiatives, including a new federal Emergency Rental Assistance Program and the annual HIC and PIT count.
- Manages the annual HUD CoC Program funding application process and the year-round oversight of the funding.
- Acts as the HMIS Lead for the CoC, ensuring that the data entered in the HMIS system by the contractor administrator is functional and accurate to complete all HUD reporting.
- Hosts and manages the winter warming shelter, which is typically a seasonal shelter
 available for overnight use during severe weather. However, the program has been extended
 over 2020-2021due to the ongoing impacts of COVID-19, the high demand and the
 successful outcomes, with plans to extend it at least through August 2022

In addition, efforts that the City of Norman has made since the inception of the CoC in 1998 include developing and revising a 10-Year Plan to respond to homelessness, leveraging additional funding, and adding dedicated staffing.

HeartLine (formerly the United Way) operates a centralized non-emergency 2-1-1 telephone hotline. In 2005, HeartLine was charged with a new, broader mission: connecting Oklahomans with help, hope and information 24 hours a day. They help more than 200,000 Oklahomans in need each year.

number and website that connects thousands of community members each year to a wealth of services and resources related to housing, health, behavioral health, income, legal issues, education, and other needs. In addition, the United Way provides financial support to many of the homeless service provider organizations throughout the region, though there are not enough resources to support as many of the providers as apply.

During the COVID-19 pandemic, the City of Norman, the CoC, and local homeless service providers have successfully secured new state and federal funding to target resources toward effective and proven strategies to support families and individuals to exit homelessness. This includes extending and expanding the seasonal shelter program and other housing and services in the region. Without the additional efforts, the impacts of COVID-19 and homelessness on Norman/Cleveland County community would likely have been significantly worse.

HOUSING AND SERVICES

The region served by the Norman/Cleveland County CoC continues to struggle with a significant unsheltered population, as well as notable rates of residents who are either experiencing homelessness for the first time or returning to homelessness after having secured permanent housing. In the 2020 January PIT count, 146 residents were found to be unsheltered, most of whom were chronically homeless (i.e., had experienced homelessness for at least a year and reported a disabling condition). In 2020, the CoC's HMIS showed that 265 persons who enrolled at a shelter or housing program in Norman/Cleveland



County reported experiencing homelessness for the first time. Among the population of homeless persons who had moved into permanent housing in recent years, 8% were found to have returned to homelessness within two years.

Currently the region does not have enough services available to meet the need. There are two year-round overnight shelters and a few other agencies that offer a small number of apartments or rooms for emergency shelter use. There is also one seasonal shelter available to people experiencing homelessness. All shelters are in the City of Norman. During severe weather in the County, the shelters have extended hours to accommodate more people from the community.

The City of Norman's low barrier warming shelter was opened for the first time in 2019. For the past year, since December 6, 2020, it has been serving people on a nightly basis. The City of Norman just recently approved a budget that would provide continued funding for the shelter to remain open through October 2021 with a potential for the shelter to remain open indefinitely. As of May 11, 2021, there had been at least 219 distinct individuals using the shelter.

In 2020, the HIC identified a total of 259 year-round beds available in the community for Permanent Supportive Housing (PSH), Rapid Rehousing (RRH), Transitional Housing (TH), and Emergency Shelter (ES), with an additional 66 seasonal beds and 4 overflow beds. Fifty-three percent of these year-round beds (138) were dedicated to some type of permanent housing and the remaining 47% (121) were for temporary housing.

Of the 259 year-round beds available in 2020, the region had 116 permanent supportive housing beds (45% of all the year-round beds) and 22 RRH "beds" (9% of all year-round beds). As of June 2021, there was a wait list for PSH of approximately 76 qualified individuals and for RRH of 31 qualified individuals.

Additionally, the area had 121 year-round temporary beds, 59 emergency shelter (23% of all year-round beds), and 62 transitional housing (24% of all year-round beds). Of those, 16 of the 59 shelter beds (27%) are dedicated to women and their children who are survivors of domestic violence.

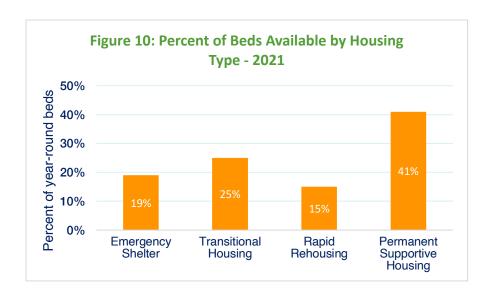
Table 2: Bed Inventory for Cleveland County

								Subset of	Total Bed	Inventory
	Family Units	Family Beds	Adult- Only Beds	Child- Only Beds	Total Yr- Round Beds	Seasonal	Overflow /Voucher	Chronic Beds	Veteran Beds	Youth Beds
Emergency, Safe Haven and Transitional Housing	16	40	78	3	121	66	4	n/a	28	3
Emergency Shelter	6	20	36	3	59	66	4	n/a	28	3
Transitional Housing	10	20	42	0	62	n/a	n/a	n/a	0	0
Permanent Housing	25	60	78	0	138	n/a	n/a	0	18	28
Permanent Supportive Housing*	15	38	78	0	116	n/a	n/a	0	18	28
Rapid Re-Housing	10	22	0	0	22	n/a	n/a	n/a	0	0
Grand Total	41	100	156	3	259	66	4	0	46	31

¹⁴ RRH is an intervention typically defined locally in the written standards and matched with a set group of participants through the Coordinated Entry prioritization. Frequently, it is used for households that need assistance locating and then getting established in a unit (security deposit, etc.) and with shorter term rental assistance and lighter touch case management than other interventions. Due to the COVID-19 pandemic, new funding made available and flexibility with existing funding streams have allowed the City/CoC to use RRH to serve individuals who would traditionally have been identified as a match for permanent supportive housing (individuals experiencing chronic homelessness) and use it as a bridge until longer term options may be identified. This option is available as a COVID-19 prevention measure and is focused on individuals who are particularly vulnerable to the virus if unsheltered. Some of the funding for this program is one-time funding so there ae questions around how to ensure those that are currently housed will be able to maintain those placements or transition to PSH when the current funding expires.



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Among residents who accessed homeless services in Cleveland County between 2017 and 2019, 15% exited to permanent housing destinations. However, rates of successful exits to permanent housing varied dramatically across different program types. While a mere 1% of residents who accessed emergency shelter exited directly to permanent housing, 59% of residents who accessed transitional housing during this period exited to permanent housing, and 73% of residents who accessed permanent supportive housing subsequently exited to stable and permanent housing.

Norman/Cleveland County has more permanent housing beds available than temporary housing beds.

When asked what the top two challenges people face in working with people experiencing homelessness, the most frequent responses, **in addition to lack of affordable housing**, were:

- Lack of landlords willing to rent
- Insufficient mental health services or case managers with expertise on mental health
- Insufficient services for substance use disorders
- Lack of adequate transportation
- Not enough places for people to safely congregate during daylight hours
- No low-barrier shelters in Norman/Cleveland County
- Misperceptions and stigma associated with homelessness

Despite substantial barriers to reducing homelessness, a diverse range of stakeholders and CoC members expressed support for the City of Norman's leadership and commitment to addressing homelessness and appreciation of the fact that the City was fulfilling many roles with limited staffing. However, some community members also expressed concern about the City's investment in homeless services and the initiatives they have undertaken. Others raised concerns about the tension that exists between the City and at least one grassroots organization that advocates for other approaches to address homelessness and economic insecurity. Some neighbors

"I don't think I fully understand the nuances of the situation, and I feel like I don't know where and how to help because of competing narratives. I wish there could be some coalition building between the sides."

Survey respondent

expressed a desire for greater transparency from the City and the CoC.



GAPS AND NEEDS

The Norman/Cleveland County area has a homeless system of care that is aligned with many national best practices and is made up of engaged, committed, and passionate providers and other stakeholders dedicated to preventing and ending homelessness. The Norman/Cleveland County CoC has participated in the national Built for Zero and 100,000 Homes campaigns, successful housing efforts that placed over 426 chronically homeless individuals and 140 veterans into permanent housing since the beginning of those efforts. As a high performing community, the CoC committed to ending homelessness for Veterans and for those experiencing chronic homelessness and reached functional zero for the Veteran population in early 2018. The CoC was formally recognized by HUD, the U.S. Department of Veterans Affairs, and the U.S. Interagency Council on Homelessness (USICH) for that achievement indicating that they had sufficient resources to provide housing to every homeless veteran in the City of Norman and Cleveland County. The CoC continues to work collaboratively to maintain functional zero while working towards ending chronic homelessness.

Despite this progress and strong collaboration, there are gaps in the system and existing tensions that prevent the community from responding as effectively and meaningfully as they could to end homelessness. Looking ahead, the community has the opportunity to build on its strong foundation in a long-lasting way. With an effort focused around key areas, the community will be well positioned to enhance and improve the current system and anticipate and address the challenges ahead. This section provides an overview of the gaps and needs of the current system with recommendations about how to address those gaps and needs in Norman/Cleveland County.

Stakeholders and focus group participants identified a number of strengths in Norman/Cleveland County:

- An engaged, collaborative CoC with generally good internal communication;
- A strong partnership with the NHA;
- A crisis intervention program through the City of Norman Police Department;
- A low-barrier emergency/winter shelter and warming center providing supportive services;
- Support for sub-populations in the region:
 - o A youth program providing shelter and a breadth of supportive services,
 - Day shelter and other programs for families with children,
 - Specialized housing and services for individuals and families fleeing domestic violence,
 - Targeted, outreach, housing and services for veterans; and
- An active CoC/CES Lead the City of Norman.



Using data analysis and a robust stakeholder engagement process, several key gaps and needs were identified. A focused effort on the following areas could help to improve services and further strengthen the efforts to end homelessness in the Norman/Cleveland County CoC:

- Opportunities for Safe and Affordable Housing
- Low-Barrier Housing and Day Services
- Supportive Services
- Transportation to Employment, Services, and Shelter
- Coordinated Prevention Assistance
- Robust Data Collection and Analysis
- Coordination and Communication to Ensure Effective Use of Limited Resources

"I used to view homelessness as the problem of the person experiencing it. Working with people who are homeless has made me realize that it is our systems that fail to provide, and people become homeless as a result of these gaps."

— Survey respondent

OPPORTUNITIES FOR SAFE AND AFFORDABLE HOUSING

Across all the surveys, interviews, focus groups, and data analyzed, there was strong consensus that Norman/Cleveland County needs more affordable housing to effectively address homelessness. Access to affordable housing is vital to enable individuals who have become homeless to regain housing. It also provides an essential base for ongoing stability, which in turn prevents future homelessness.

Permanent housing programs, such as permanent supportive housing (PSH) and rapid rehousing (RRH), are well-established as some of the most cost-effective and successful strategies to address homelessness. These programs offer subsidized housing with the supportive services a household needs to retain that housing and attain long-term stability. Services can include case management, connections to employment and public benefits, and medical, mental health, and substance use treatment as well

"If we can find more affordable housing, we can offer more support to individuals."

— Survey Respondent

as transportation, childcare, and life skills. The programs tailor services to the unique needs of each household and successfully support many Cleveland County residents each year to permanently exit homelessness and regain self-sufficiency.

There are not enough permanent housing options and related supportive services currently available to meet the need in Norman/Cleveland County. Although there are disagreements on many issues, when the community-at-large was asked, more than two out of three respondents strongly or somewhat agreed that they support funding new permanent supportive housing (e.g., long-term housing with supportive services for people with disabling conditions).

NEED FOR AFFORDABLE UNITS

The annual 2020 Norman/Cleveland County January PIT count made it clear that there are not enough permanent supportive housing beds to meet the needs of the hundreds of people experiencing chronic homelessness:



While 166 permanent supportive housing beds were available in 2020, 215 individuals experiencing chronic homelessness were identified during the same year, including 146 unsheltered chronically homeless individuals, suggesting an urgent need for more permanent supportive housing beds.

Fifty-six percent of survey respondents believe that there is either a shortage in the supply or a *severe* shortage in the supply of affordable housing units. When asked what they believed were the top three barriers to finding affordable housing, more than half of survey respondents identified a simple lack of affordable units.

"I am tired of living outside. I would be really grateful for housing, please."

— Focus group participant

In Norman, the University of Oklahoma brings over 31,000 students to the community and thus to the rental market. An evaluation of the numbers of available units and the breakdown of the unit sizes would indicate that Norman has a good cross-section of availability. However, most of the units that are available for rental and ownership are not affordable to the renter/buyer at or below 80% of the area median income (AMI). Census data indicates that there are

"Norman has a college community. A lot of college students are taking over one bedrooms and parents pay for this, which is very expensive."

– Stakeholder

19,215 households in Norman at 80% or below AMI, and there are 11,897 households at or below Median Family Income that are cost burdened. There currently is not sufficient housing for households at 0 to 30% AMI. There is also a shortage of housing for remaining income levels (30 – 80%) when considering quality and cost burden.¹⁵

Larger units are also a challenge for families to afford. Recently the City of Norman has experienced an increase of private student housing being developed where the rent is based upon a bedroom unit versus a multiple bedroom unit. As noted above, almost three quarters of the housing units available in Cleveland County are three-bedroom units or larger. One stakeholder pointed out that housing in the community is built to cater to students with four- or five-bedroom houses.

In the Cleveland County HUD Metro FMR Area, the Fair Market Rent (FMR) for a one-bedroom apartment is \$738 and a two-bedroom is \$918 in 2021.¹⁶ The median gross rent in Cleveland County in 2020 was \$926. A household must earn \$36,669 annually in order to afford this level of rent and utilities without paying more than 30% of income on housing. Assuming a 40-hour work week, 52 weeks per year, this level of income translates into an hourly Housing Wage of \$17.62/hour, which is more than double the Oklahoma minimum wage of \$7.25.¹⁷

Despite this, there is limited housing assistance available. The Norman Housing Authority (NHA) provides approximately 1,250 Housing Choice Vouchers and operates a public housing program consisting of 173 units in the Norman City limits. Yet, there were still over 500 eligible households, including individuals and

¹⁷ The State of Oklahoma follows the federal minimum wage, which for 2021 is \$7.25 per hour. <u>U.S. Minimum Wage</u>, Department of Labor.



¹⁵ City of Norman Consolidated Plan 2020-2024, First Year Action Plan 2020, pg. 68.

¹⁶ <u>FY 2021 Fair Market Rent Documentation System,</u> Cleveland County, Oklahoma, HUD.

families, on the waiting lists in 2020.¹⁸ Since 2020, the with the issuance of additional Mainstream Vouchers and new Emergency Housing Vouchers, the NHA has helped households to access housing and move off the waiting list. At the time of this writing, there is virtually no waiting list.

INCREASING THE NUMBER OF LANDLORDS WILLING TO RENT TO PEOPLE WITH LIVED EXPERIENCE OF HOMELESSNESS

Landlords are invaluable partners in helping people exit homelessness and regain stability. Participating landlords can benefit from subsidized rent programs because they provide a reliable source of rent as well as a support system for both the landlord and the participant.

Program staff can act as mediators, help support the participant to remain stably housed, and can also help locate new tenants quickly if necessary. Despite these benefits, landlords are often reluctant to rent to people who were recently homeless, as they may have gaps in their rental history, credit issues, histories of past evictions, or other barriers.

Many communities – even those in high-cost rental markets – are highly successful in working with landlords and property managers to identify units for people exiting homelessness. Building relationships, including understanding and addressing landlords' concerns, is key.

Stakeholders in Norman/Cleveland County, however, shared that there are not many landlords in the region who are willing to rent to people experiencing homelessness. At least one stakeholder believes that small, independent landlords are more open to working with homeless service providers and their clients, but that many landlords located in the City are larger and less flexible. Stakeholders have also found landlords charging three times the rent for deposit, which makes it almost impossible for people with little or no income or living on a fixed income to afford. Respondents also indicated that there was a bias against renting to people with housing vouchers, which frequently is tied to a lack of understanding of the benefits and the stigma associated with public benefits. Many stakeholders expressed that the community

"Landlords are picky about who to rent to as onebedrooms are in high demand by college students. Landlords don't want to rent to homeless people."

— Stakeholder

"The landlord will be more receptive if social workers do not drop the ball and follow through. A bad landlord experience sticks and spreads around [and] makes other landlords reluctant. It is important that social workers understand this and know they are marketing representatives for the promises."

— Survey respondent

needs to do more outreach to landlords and property owners to help voucher holders succeed, especially those with multiple barriers.

Survey respondents indicated that some of the greatest barriers to accessing affordable housing are landlords. Forty-three percent of community members surveyed indicated that one of the top barriers to

¹⁸City of Norman Consolidated Plan 2020-2024, <u>First Year Action Plan 2020</u>, pg. 49.



access affordable housing is landlords unwilling to accept tenants with certain conditions (e.g., credit issues, criminal history, etc.) (43%). Other top barriers identified by survey respondents included landlords unwilling to rent to people just out of homelessness (22%) and landlords unwilling to accept subsidies or rental assistance (19%).

Homeless service providers also indicated that not only is it difficult to find landlords willing to rent to people experiencing homelessness, but the situation is more dire when people wishing to rent have a serious mental illness or a criminal background. Stakeholders familiar with Oklahoma City felt that it was much easier to get landlords to rent to people who are homeless there than it is in Norman/Cleveland County.

Affordable Housing for People with a Criminal Background

Cleveland County is particularly challenged with being able to find affordable housing for people with a criminal history, especially those who have been convicted of a sex offense. Like many communities, having a criminal history in Cleveland County is a barrier to being able to access affordable housing.

There are no laws requiring landlords to rent to people with criminal histories. Of the 104 individuals recently listed as sex offenders, at least 18 (17%) were identified as homeless,

"Being in a college town, the low- to moderate income population is in great competition for student housing."

— Stakeholder

compared to violent offenders, of which none were identified as homeless. Stakeholders shared that while people with misdemeanor offenses were able to obtain rental housing, those individuals experiencing

homelessness who had a history of violent or more serious crimes continue to find it nearly impossible to rent in the area, especially without assistance from service providers.

For individuals who have been convicted of a sex offense, affordable housing is extremely difficult to find. The state of Oklahoma has very strict rules about how close they can live to schools, parks, churches, and other public spaces. Pursuant to Oklahoma State Law,

"In Norman you can't drive without driving by schools, churches or parks – they are everywhere – more concentrated."

— Stakeholder

Individuals who have been convicted, received a suspended sentence, or a deferred sentence for a crime requiring them to register pursuant to the terms of the Sex Offender Registration Act cannot live, either temporarily or permanently, within a 2000-foot radius of any public or private school site, educational institution, property or campsite used by an organization whose primary purpose is working with children, a playground or park that is established, operated or supported in whole or in part by city, county, state, federal or tribal government, or licensed child care center as defined by the Department of Human Service.¹⁹

¹⁹ <u>Offender Registration Information</u>, City of Norman.



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Based on the geographies of the City of Norman, there are very few state permissible "green zones" that allow people with sex offender histories to be able to rent or own. Norman encompasses over 196 square miles. Yet, schools, parks, and day care facilities greatly limit the areas where sex offenders can live in accordance with the Oklahoma State Statute.²⁰ Stakeholders report that there are a very limited number of available apartments within the green zones that are eligible for people convicted of a sex offense to live. Within those zones, they face difficulty finding landlords willing to rent to them based on their past conviction.

"Norman has talked in the past about how they would love to have SROs. SROs in a green zone would be great."

— Stakeholder

OTHER BARRIERS TO HOUSING

In addition to the lack of affordable units, many individuals also face barriers to housing because they do not have sufficient government issued identification or other documents to show eligibility, may have been evicted in the past, may have poor credit history, and/or lack the resources needed to cover move-in costs (security deposit, etc.).

For those individuals who continue to try to apply for affordable apartments, it usually involves paying a fee for every application form they complete even when they may be rejected because of past history. In some cases, when they apply, the rental company or landlord does not make an effort to reply to them, making it more challenging for them to afford any future opportunity that may come up. For many households experiencing homelessness, it is difficult to save for upfront first-time costs for housing. Without help from local providers, it is very challenging to transition from homelessness into housing and maintain stability long-term. This assistance is available through various providers; however, it is limited and has specific eligibility criteria. In addition, the focus groups

"Application fees are a huge barrier... people have no money - they can't afford to fill these out all the time."

— Focus group participant

demonstrated that some individuals experiencing unsheltered homelessness are not aware of all of the resources available, including how to obtain identification and assistance with application fees and even basic necessities and crisis management.

Some stakeholders shared that there are biases against people of color in terms of access to housing and services in Norman/Cleveland County. More than one individual experiencing homelessness reported having experienced discrimination when trying to access the system of care and in interactions with crisis response. One service provider indicated that they accompany their clients who are women of color when they apply for housing "to ensure fairness," as they have seen a troubling trend of discrimination when they go without a service provider representative.²¹

²¹ The City of Norman has a contract with the Metropolitan Fair Housing Council of Oklahoma, Inc. to document fair housing activities under the City of Norman's Community Development Block Grant (CDBG) contract. They report annually on any housing complaint intakes/inquiries processed and formal housing discrimination claims filed with HUD. In FY 2021, 44 housing complaint intake/inquiries were processed related to Norman tenancy under the CDBG-funded fair housing contract, and 7 formal housing discrimination claims were filed with HUD's Office of Fair Housing & Equal Opportunity for violations covered under the Federal Fair Housing Act. Note that these figures are specific to CDBG-funded activities and that not all incidents of housing discrimination are formally reported.



²⁰ Ibid.

Some stakeholders who participated in the community engagement process noted that the CoC is very effective at housing people who are better able to navigate the system, less vulnerable, and have fewer barriers to housing than individuals with greater need and, in many cases, that are more vulnerable, facing severe mental or physical illness, and are unable to navigate the system on their own. However, there were also concerns expressed by some that the CoC had been overly focused on serving individuals with the highest vulnerability, leaving others who could be more easily and quickly housed and connected with services, like rapid rehousing, waiting longer than necessary for help. As discussed above, the existing data indicates that a significant number of the unsheltered population are currently chronically homeless and that a variety of interventions are being used to serve people experiencing chronic homelessness. However, due to data quality issues, the fact that no unsheltered January PIT count could be performed in 2021, and the ongoing impacts of the COVID-19 pandemic, additional analysis is required to better understand the current context in the region.

Coordinated Entry System data provides useful context, including the By-name-list (BNL), which tracks individuals/heads of household who are in the homeless system of care and who need housing. The BNL includes intake and assessment data, including prioritization criteria (i.e., a ranking score) that helps match individuals and families to the housing and services that best serve their needs and helps to determine the order of priority when resources become available. Keeping the BNL up to date and looking at it over time, can help the CoC and City Staff understand the need and any changes over time. See the table below of BNL data from January of each year from 2016 – 2020. One factor to note is that between 2019 and 2020, a data cleanup project removed inactive households from the list so some of the decrease seen in 2020 is the result of that data cleanup.

Table 3: Data from By-Name-List Data January 2016 – January 2020

	January 2016	January 2017	January 2018	January 2019	January 2020
Singles	43	84	97	154	64
Families	2	3	0	6	0
Non-chronic Veterans	10	5	4	5	4
Chronic Veterans	1	1	3	0	2

The City of Norman, in conjunction with other local organizations and businesses, has historically pulled together a regular event that brings a coalition together to help people obtain their birth certificates, state identification, and social security numbers/cards. Before the COVID-19 pandemic, these events were held every quarter so that individuals experiencing homelessness locally would only have to attend this one event to get the assistance needed to overcome some of the documentation barriers preventing individuals from receiving housing and benefits. Individuals who had benefited from these events were very grateful and highly praised the efficiency and benefit of this one-stop approach. Additionally, other individuals who were struggling to obtain these documents, especially during the pandemic, highlighted the importance of holding future events. Even with the one-stop opportunity on hold during COVID-19, there is an ability for people experiencing homelessness to receive documents through multiple agencies, though that can be challenging to access.



Stakeholder interviews and focus groups highlighted an increased need for housing-based case management, landlord engagement, and legal assistance to support reducing existing barriers to identifying and connecting households to affordable permanent housing and helping them to stabilize and maintain that housing.

Recommendations

AFFORDABLE HOUSING

- Commit to additional permanent supportive housing units. Consider a wide range of options, including rehabilitation or renovation of existing buildings and new construction as well as utilizing as many vouchers as possible for persons experiencing homelessness (to be used at the locations of their choice):
 - Establish a five-year Countywide Housing Development Pipeline that identifies an achievable path to establish new housing so that households with members who have disabilities can exit homelessness and attain stability.
 - Evaluate the feasibility and next steps for non-traditional housing options, such as repurposed motels and accessory dwelling units (ADUs).
 - Establish a shared housing program that can increase the housing available to single adults by using 2- and 3-bedroom homes for individuals exiting homelessness.
 - Support the addition of mainstream and HUD-VASH vouchers as available.
- Identify funding and partnership options that would increase the availability of permanent housing for single adults, including shortand medium-term rental assistance, PSH, and new development.
- Consider adopting policies that require set asides for all new development dedicating a certain proportion or number of units for extremely low-income households.
- Identify potential sites and provide land, aggressively expedite development and offer other incentives for PSH development.
- Widely advertise the eligibility criteria and necessary process for obtaining housing assistance
- Prioritize the development of single-room occupancy (SROs)
 buildings, which provide small furnished single rooms within multitenant buildings providing housing for residents with low or minimal
 income who may be transitioning out of long-term homelessness.



AFFORDABLE HOUSING (cont'd)

- Identify potential sites and provide land, aggressively expedite development and offer other incentives for PSH development.
- Widely advertise the eligibility criteria and necessary process for obtaining housing assistance.
- Prioritize the development of single-room occupancy (SROs) buildings, which provide small furnished single rooms within multi-tenant buildings providing housing for residents with low or minimal income who may be transitioning out of long-term homelessness.

"An SRO is a good alternative and people who are not accepting services would be more open to an SRO."

— Stakeholder

LANDLORD ENGAGEMENT

- Invest in staffing to develop and lead a year-round landlord engagement campaign to educate the general public and recruit landlords.
- Develop a robust landlord engagement campaign, which can include targeted outreach to landlords, education and training, developing a speakers' bureau, annual luncheons, landlord and tenant awards, and other efforts such as:
 - Develop an outreach message and ensure it reaches landlords and property managers. Publicize the program in landlord and business association publications and at meetings and gatherings. Engage participating landlords in the program to tell their stories of success to their peers.
 - Create materials that help explain the advantages for the landlord and the steps the programs take to ensure the properties are respected, the clients are supported, and rent is paid. Utilize landlord testimonials whenever possible highlighting benefits such as the reliability of external support if issues arise and risk mitigation back-up for damages if they are to occur.
- Address barriers for individual tenants by creating a portfolio for the
 client by including letters of support from community members who
 know the client or by adding information about the client's
 background and the steps they have taken to improve their housing
 stability. Help with criminal record expungement, credit repair, and
 eviction expungement, if needed. Provide opportunities for potential
 tenants to meet landlords one-on-one to create personal
 connections.



LANDLORD ENGAGEMENT (cont'd)

- Establish a landlord risk mitigation fund that provides compensation
 if issues between landlord and tenant arise. Ensure landlords have
 a liaison they can call if they have concerns. When a client is not a
 good fit for a unit, programs should move quickly to prevent the
 need for an eviction proceeding.
- Consider creating financial incentives for landlords renting to voucher holders. The incentive program could include bonuses for new and/or returning landlords. Additionally, provide coverage for application fees and assistance with security deposits and move-in costs to help ensure vouchers are utilized and used equitably.
- Develop shared talking points to deepen landlord's awareness and understanding of how homeless-serving programs work, how supportive services are provided to program participants, and how the landlord mitigation fund is provided (see below).
- Create a bridge of support between landlords and clients to have a
 positive experience and continue building the relationship in the
 local program over time. Landlords often express gratitude about
 the ability to fill vacant units quickly without the cost of advertising
 and appreciate having the monthly rent guaranteed.
- Train and support providers to enable conversations with landlords to respond to their concerns and ensure that providers are taking important steps to cultivate ongoing relationships with landlords who are part of their programs.
- Ensure that each agency has a formalized practice protocol for being responsive to participating landlords, including providing timely assistance during a crisis as well as accepting and responding to their feedback.

HOUSING ASSISTANCE

- Designate a countywide housing navigator who can meet in-person with individuals and families experiencing homelessness. Provide outreach in the streets, at encampments, and at partner organizations, and train staff from other organizations to better provide housing navigation assistance.
- Conduct a countywide advertising campaign to highlight the availability of various types of rental assistance programs, including emergency and temporary rental assistance.



HOUSING ASSISTANCE (cont'd)

- Review and revise policies for COVID-19 rental assistance programs to ensure that the COVID-19 nexus criteria are as broad as allowable. For example, most families with back rent have a COVID-19 nexus. Emphasize that lay-offs, reduced hours, increased rent, unemployment and COVID-19 illness can all create a nexus that meets the eligibility criteria.
- Consider a flexible funding pool, which provides financial support to individuals and families to address the limitations of traditional funding streams for financial barriers that can prevent people from successfully exiting homelessness (e.g., high rent deposits, move-in costs, car repair and other one-time costs).
- Expand highly successful coordinated efforts to assist people experiencing homelessness with obtaining identification documents and connect them to public benefits by holding community events more frequently than once per quarter.
- Strengthen access to resources to support households with criminal and eviction expungement, credit assistance, and document readiness to ensure they can use available housing subsidies as quickly as possible. Include navigation and peer support to help individuals accomplish these tasks in between coordinated events.
- Develop a peer outreach and support program utilizing individuals with recent lived experience to help individuals experiencing homelessness build trust and guide them in navigating the system.
- Locate a development in Oklahoma green zones to provide independent housing for people with criminal convictions.
- Expand flexibility and availability of resources to subsidize and operate supportive housing for people exiting homelessness.

LOW-BARRIER HOUSING AND DAY SERVICES

Norman/Cleveland County has a large number of people experiencing long-term homelessness who require intensive engagement and support. Some shelters provide meal services, a food pantry, and/or connections to IDs/benefits during the day, and another provides a day center for women and children. However, with no permanent full-service daytime drop-in centers and reportedly only one completely low-barrier overnight shelter – and relatively few shelter beds of any kind – Norman/Cleveland County has a relatively large population of people who live outside full-time.

"[There is] no place to put people and that's why people stay for longer in encampments."

— Stakeholder



Ending homelessness for individuals and families who have long been homeless often requires frequent and repeated engagement over time. With a limited number of outreach resources available for the large number of people experiencing chronic, long-time, unsheltered homelessness in the current system, many people are not getting connected to services and support.

"It is hard for a person to fix their problems if the biggest concern is where to sleep."

 $-Focus\ group\\participant$

Housing-focused crisis shelters (often known as "emergency shelters") are an important part of a community's response to homelessness. While they help people stay safe from the dangers of living outside, they are also a valuable link to permanent housing, especially for people who have been homeless for an extended period of time and might

be reluctant to engage in services.

The most effective shelters are "housing focused," meaning that they are low-barrier and tailor their services to support the household with the goal of exiting homelessness. These programs have few preconditions for admittance, such as sobriety, ID, income, etc., and limit the barriers to entry by allowing some flexibility (e.g., entry of partners and pets are allowed, storage for personal belongings are available, and there is a flexibility of hours whenever possible). The programs typically do not require participation in services as a condition of stay, but instead offer client-focused, voluntary case management working cooperatively with the household to create an action plan to help move them into housing. This work is individualized for each client and offers flexibility with intensity and frequency, recognizing client choice with the focus on assessing barriers to housing and achieving housing stability.

"When I'm at Food & Shelter, I can use the internet, [but] they don't serve dinner here. You have to go down to Salvation Army to eat. And after they serve food, we have to find somewhere else to sleep – so a vicious circle."

— Focus group participant

A **Housing First/Low Barrier** approach. Housing First is a national best practice that eliminates barriers to housing, ensuring individuals and families can exit homelessness as quickly as possible. Under a Housing First approach, people experiencing homelessness are supported in returning to housing as quickly as possible, often through supportive housing programs that have no pre-requisites, preconditions, or program participation requirements. Housing First does not mean "no rules," but it does mean no unnecessary rules that could prevent people from entering the program.

The Housing First approach has been extremely successful in reducing the length of time households are homeless, preventing returns to homelessness, and supporting participants' long-term stability and well-being. Research suggests Housing First program participants are 2.5 times more likely to be housed after 18-24 months than other programs.

Multiple studies show that Housing First significantly reduces the costs of homelessness on communities, for example:

- A study of 700 veterans across 14 medical centers showed a 32% reduction in VA health care costs for those receiving a Housing First intervention, with intensive inpatient costs down by 54%.¹
- The City of Albuquerque saw a 64% reduction in jail costs and 84% reduction in costs for in-patient medical and mental health visits after one year of using a Housing First approach.¹
- Another study found that providing a Housing First intervention saved the system \$2,449 per person per month.



Focus group participants and stakeholders expressed the need for more low-barrier, housing-focused services in Norman/Cleveland County. While people experiencing homelessness appreciated the important work happening through the Salvation Army and Food & Shelter, participants were concerned about the lack of places they could go during the day to get comprehensive services such as taking showers, doing laundry, undertaking job searches, getting job training, and other life skills education. Participants also expressed that they would like to easily access places that can offer various kinds of supportive services in order to help them transition from living unsheltered to stable housing.

While many organizations have some emergency shelter beds, only three year-round shelters have the capacity to serve more than 5 individuals/households at a time. Most of the emergency shelters have program rules for entry and conditions for participation, which limits who can be sheltered. The warming/emergency shelter, which has been run by the City of Norman for the past two years, is a low-barrier shelter that will continue to stay open through August 2022

As with permanent housing, some of the shelters require people to have proof of identification to stay at the shelter or use day services. There are people currently living on the street or in encampments who do not have IDs and do not have supportive services to help them get the documentation needed to access those shelters. Many providers offer assistance with the process of obtaining identification documents, but this can be a lengthy and complex process, which was one of the concerns most raised during the focus groups with individuals currently experiencing homelessness.

Providers and people experiencing homelessness equally identified the need for more shelters that are low barrier with the ability to shelter people who have pets, partners, and a larger number of personal items. Service providers interviewed and surveyed recognized that having low-barrier shelter gets people into the system and provides improved access to services and connection to benefits but discussed the need to balance that with some rules to maintain effective programs.

"A 24-hour shelter would do great. And save more struggle and failing of those in need."

— Survey respondent

The Winter/Warming shelter has provided a low-barrier alternative for the past few years. This past year, the shelter has been in operation since December 2020 and does not require participants to display their identification, to commit to sobriety, or to participate in any programs. Administered by the City of Norman, the shelter has not had a decline in people using the shelter even during other climate seasons. Utilizing a variety of funding methods, the City of Norman has operated and will keep the shelter open at least through August 2022

Focus group participants reported experiencing a trend towards criminalizing homelessness in the region, including making it unlawful to sleep in public, being evicted from encampments, or being stopped regularly while walking or congregating. Forcibly removing people from sidewalks and alleys when they are sleeping on the streets does not force them to leave the region nor does it end their homelessness. Instead, most people simply relocate to sleep in a different part of the community. These processes can be expensive and require the use of public resources such as law enforcement to carry out the actions – so it is often worth considering whether there are times that these resources would be better spent in longer-term solutions such as the outreach, shelter, navigation, and long-term housing.



- Establish a permanent year-round, low-barrier housing-focused shelter with day and night access thereby increasing the capacity of the system and the long-term housing placement rate of individuals experiencing homelessness.
- Reduce existing barriers to entry when possible in the housing programs that are currently available in the region.
- Consider adaptations to policies of the existing shelter and crisis response system where applicable to ensure the full system is housing-focused and low-barrier. This would include:
 - Admission policies that screen-in rather than screen-out potential participants with the greatest barriers to housing.
 - Minimal rules and restrictions that focus on behavioral expectations to help ensure client and staff safety – few rules, not "no rules."
 - Client-focused, strength-based case management with an emphasis on helping connect people to housing.
 - Accommodations that welcome partners, pets, and possessions so that people do not face a choice of housing or separation.
 - Flexible access to shelter and services, including extended hours of operation, arrangements for late arrivals, non-restricted mealtimes, and lenient curfew policies.
- Provide voluntary wrap around services and connections to key resources at all overnight and day shelters.
- Emphasize supporting participants to exit to permanent housing through proactive case management and best practice strategies, such as motivational interviewing, trauma-informed care, and housing-focused case planning.

SUPPORTIVE SERVICES

Nonprofits, community groups, and county agencies provide a variety of services that can help people to exit homelessness and stay housed for the long-term. Programs such as mental health treatment, employment and job training, health care, and substance use recovery can meaningfully help people attain greater stability. More than one in three community survey respondents indicated that one of the top three barriers that prevents people from accessing affordable housing is the lack of supportive services necessary for people to sustain housing (37%).

"Many people need one on one help to see what their needs are."

-- Stakeholder



While some of these programs are dedicated to people experiencing homelessness, others are resources available to everyone in the community. Ensuring that these programs are available and accessible for people experiencing homelessness allows the community to get the most out of its existing resources.

A large majority of survey respondents indicated that the services needed most in the region are mental health services (70%), substance use treatment (56%), and case management (42%).

Trauma, affecting people's physical, emotional, social, or spiritual well-being, is widespread amongst those experiencing homelessness. The impacts of trauma and mental illness are widespread across the City of Norman and Cleveland County's population experiencing homelessness.

Many of the individuals experiencing homelessness in Norman/Cleveland County have mental health conditions and substance use disorders. For the 2021 January PIT Count, close to 50% of people experiencing homelessness were identified as having a serious mental illness.

For teens experiencing homelessness in Norman/Cleveland County, they often share a common experience of trauma and need mental health treatment. During the COVID-19 pandemic, service providers found challenges in providing mental health services were exacerbated due to participants living in small rooms and all the protective gear needed to go to school and interact with other peers. For a period of time, mental health services were discontinued and then returned online only. Some teens chose not to get the online services as they preferred to receive them inperson.

When community survey respondents were asked to identify the biggest roadblock to ending homelessness in the region, the most common answer was insufficient mental health support. At the same time, 89% of community survey respondents said that they strongly or somewhat agreed with the statement, "I support providing more medical, mental health, and substance abuse care to people experiencing homelessness.'

Multiple focus group participants noted the challenge of accessing housing (e.g., permanent supportive housing) for people who have severe physical or mental disabilities. They shared that the system was understandable and fairly easy to navigate if an individual is familiar with terminology and can advocate for themselves or has someone to advocate for them. But for individuals with less

"A large majority of our homeless population are mental health patients. They are not capable; they are living in survival mode. They are not capable of keeping appointments. They need a safe place to sleep."

— Stakeholder

"The 'mentally displaced' need extra care and the staff at the shelter can only provide so much help to keep things going. The staff can't help those who need help, they aren't qualified, so where do those folks go and how do they get there for help. It's not here!"

— Survey respondent

"The programs are there, but not everyone responds to the same care in the same way. There will be a day and they are going to look in the mirror and they will suddenly realize what has happened to them."

Stakeholder

education or who have a mental illness or a substance use disorder, they believe the system is hard to



understand and often leads people to prefer living unsheltered in encampments. When people experiencing homelessness were asked in a survey what would be the most helpful, one of every three respondents said mental health services.

When specifically asked about availability of mental health services, stakeholders – both service providers and people with lived experience of homelessness - felt that services were available for people who had the skill set, education, and lower acuity mental health conditions to be able to seek out and ask for what they needed.

"Stabilization is not treatment."

—Stakeholder

A number of stakeholders described experiencing a crisis situation and needing immediate help. In most cases, they needed to go to a facility to be evaluated by a mental health professional. Reportedly, the facility might admit them, but they usually stayed for no more than five days for the facility to stabilize them. After that, they were typically provided with up to a two-weeks supply of medication and given a follow-up mental health appointment. Service providers and individuals who experienced these brief stays

shared that many of the participants experiencing severe mental illness, especially in a crisis state, struggle to take their medications and do not go to the follow-up appointment. Unfortunately, they also frequently repeat this cycle again at some point, if not immediately.

One concern expressed was that supportive services were not sufficient for people with higher acuity conditions, with less education, or more intense needs. Some stakeholders raised concerns that mental illness was not understood and is not being treated as a disability and that

"Mental health doesn't listen, gives too many prescriptions."

— Focus group participant

people with serious mental illnesses were not supported adequately within the system of care in Norman/Cleveland County. Many were concerned that crisis management and stabilization was the primary means of treating people with a serious mental illness and that intensive treatment as well as comprehensive case management and wraparound services are limited due to a lack of resources.

Many stakeholders raised the issue that the state mental hospital discharges people into the City of Norman without a transition plan. Because Griffin Memorial Hospital is the primary state mental institution in the City, people from across Oklahoma come to the area to access inpatient services. For those individuals who do not have family or a place to be discharged, stakeholders shared that people are simply being discharged into the community without a home or place to go, rather than being returned to their home communities. Others similarly shared concerns about the Department of Corrections discharging from custody where reportedly individuals are discharged in the area without any advance transition or housing plan in place.

One area lacking consensus was the expertise of law enforcement around working with people who have a mental illness, especially those with serious mental illness or those experiencing a crisis. Many providers expressed support for the work of the specially trained officers and the City highlighted the importance of the collaboration with law enforcement in their efforts. Some focus group participants expressed their appreciation regarding positive experiences they had with officers trained to serve people who have a mental health illness, but others felt there was a disconnect between a strong police presence and people with serious mental illness. Some specifically shared that having police officers appear in uniforms with guns could be traumatizing and others reported negative interactions with officers. Some stakeholders and persons with lived experience felt that more training for officers, outreach



to unsheltered individuals and building trust was needed and multiple participants suggested embedding individuals with mental health expertise with law enforcement.

Stakeholders indicated that service providers with mental health expertise were over worked, underpaid, and unable to provide the breadth of services needed in the homeless community. They shared that the system is difficult to navigate overall, but, worse for people with mental illness. They believe that it is difficult to know what resources are available in the moment of crisis. They also shared that the biggest roadblock to obtaining affordable housing was insufficient mental health support.

When community survey respondents were asked whether they would support more medical, mental health, and substance use treatment for people experiencing homelessness, close to 9 out of 10 people either strongly or somewhat agreed.

SUBSTANCE USE DISORDER

One area that a variety of stakeholders addressed was the lack of support for people hoping to address their substance use disorders. Many people indicated that there are extremely limited resources available to help people with substance use disorders, calling for Norman to establish a drug treatment facility and/or a methadone clinic. The state of Oklahoma in general has no staterun detox centers; the only ones that exist are privately run.

Stakeholders in the surveys and in interviews shared that there are not enough resources for people with substance use disorders. The services that are available are difficult to access, especially in person, and this became more difficult during COVID-19. People with lived experience said that not only are there insufficient services, but there is still a great deal of stigma in the community. Some noted they were afraid to get help from service providers because they may get charged with crimes. Some individuals said that in practice, if people have a substance use issue, they may be deemed ineligible for housing.

"Norman needs a drug treatment facility"

— Survey respondent

"From my perception, Norman needs a nonjudgmental methadone clinic or help escaping from addiction."

— Survey respondent

CASE MANAGEMENT

Case management is a crucial supportive service for people experiencing, exiting, and at risk of homelessness. For people who are currently homeless, housing-focused case management is a best practice that focuses on the specific challenges and barriers keeping the family or individual from regaining housing. While people experiencing homelessness often have complex needs, these are generally more effectively addressed after they are housed.

"Almost all the case managers are not outreach case managers. They are working full-time jobs and then doing outreach in addition to what they do."

— Stakeholder



Of the top 5 priority areas that survey respondents mentioned with regard to the most needed supportive services, among the top three services was case management.

Stakeholders acknowledged that there are not enough case managers doing work on behalf of the CoC. They noted that it is especially difficult with the existing amount of dedicated case management and outreach staff to manage all of the households that are unsheltered or recently housed. They noted that it is especially difficult to find and maintain a relationship with unsheltered individuals given staffing limitations.

For many of the case managers in the community, they work full-time jobs for their organizations and provide additional case management services after hours. Many reported doing outreach case management at local encampments in addition to their full-time jobs or are staffing the Warming/Winter shelter part-time in addition to their full-time job for a local agency.

Some stakeholders indicated that passionate community advocates have stepped in to do informal case management with unsheltered homeless individuals but are not necessarily working in conformity with best practices or in collaboration with the CoC. Stakeholders also shared that they have individuals on the by-name-list in need of services that sometimes must wait over 6 months for case managers to assist them. Others suggested that there was a gap in the involvement of the County regarding case management, noting that the County would soon be receiving additional federal funding that could be used to assist individuals experiencing homelessness and hoped for improved collaboration around how to deploy those resources within the system of care.

Others shared that in addition to not having enough case managers

in general, that there were not enough case managers who are people of color. One stakeholder noted that some funders balk at funding administrative costs, which often include case management services. They reported that organizations need to be creative about how to include case management into a grant.

"I would strongly disagree with any housing initiative that is funded with public money that does not include case management to assist the homeless person with the root issues that have put them in their current situation."

— Survey respondent

"We are really good at housing people who are easy to be housed but more creative solutions are needed like overnight case managers and talking to people who are more difficult to be housed."

— Stakeholder

STREET AND ENCAMPMENT OUTREACH

Street and encampment outreach teams meet people where they are to provide connections to services. Many people with extensive histories of homelessness are disconnected from the network of services that could help them return to housing. They often have deep-seated trauma and negative experiences with the safety net system that may make them reluctant to engage with providers.

When outreach workers go to where people are living, they can build trust, better understand the circumstances that people are facing, and offer advice and support to help people move to more "People lean into the people who will walk them through getting an ID, getting Section 8 housing, etc. Having someone introduce you to all the different programs."

— Focus group participant



supportive environments. Outreach specialists use proven engagement techniques, such as Trauma Informed Care, Critical Time Intervention, and Motivational Interviewing, to build relationships of trust and help people connect to services and support they need to find and keep housing.

Some stakeholders noted that there is a nurse from Norman Regional Hospital who partners with CoC members to provide outreach, but that there is not a medical street team that is regularly engaged in the community.

For street outreach that is not providing medical or other specific care, connecting to people experiencing homelessness to build trust and connect them to housing and supportive services can be difficult. One service provider indicated that they have worked with people who have been homeless for two or three

years who were not aware of the agencies and services available to them. For an individual that is not already connected to services or who has recently become homeless, it can be hard to find out what resources are available.

Both focus group participants and stakeholders recognized that there are not sufficient case management services in the community particularly for individuals who are living unsheltered. Stakeholders acknowledged that much of the case management happens at organizations and not on the streets. Some of the people with more serious mental illness find it difficult to make appointments and follow-up to get onsite to an organization to get the services that they need.

"Homelessness services are not personal enough... More one-onone with providers... It would be easier if providers reached out to those needing help."

— Focus group participant

Many focus group participants felt that community partners, the City and the police know them. But one concern expressed was that outreach for unsheltered individuals focused solely on whether a person wanted to move from the street to temporary housing, without sufficient supportive services. A sentiment among providers, community advocates, and individuals experiencing homelessness was that additional supportive services in the field is needed, especially finding dedicated outreach specialists to help build trust and develop relationships needed for people experiencing chronic homelessness to transition to permanent housing.

For successful outreach models, several homeless service providers noted that the case managers doing Veteran's outreach provided a good model for outreach. Their main staff is dedicated to spending time on the streets and in encampments on a regular basis, making the program successful at building trusting relationships. Service providers would like to see similar outreach for the rest of the homeless community.

Another issue that consistently arose throughout the community engagement process was concern about the negative impacts of encampments in the City of Norman/Cleveland County and how to best address these areas. Community stakeholder feedback emphasized the negative impacts of encampments on adjacent areas—including neighborhoods, businesses, and recreation areas—by damaging the environment, decreasing housing valuation, threatening safety, and reducing use and enjoyment. Some neighbors felt fear for their families or community and anger about the actions or perceived inaction of local jurisdictions or the CoC surrounding these issues. Others expressed being upset about the situation coupled with confusion, compassion, and concern for those experiencing homelessness and expressed a desire to find solutions collaboratively with the City and/or CoC.



On the other hand, there was feedback from other stakeholders and providers who wanted to acknowledge that encampments were the temporary home of too many unsheltered individuals who are vulnerable and at risk and that when disrupted, it can have significant consequences for the health and safety of those individuals and their ability to move out of homelessness. As the City of Norman grapples with how to balance the various interests and impacts of encampments, they have recently intervened to clear encampments in conjunction with offering services and shelter/other housing options. Unfortunately, this may be necessary at times, but it is the case that once people have moved to a new location, their service providers may no longer be able to find them, resulting in missed opportunities to follow-up and connect them to housing, benefits, or other resources needed to help them exit homelessness. Optimally, investments in low-barrier permanent shelter as well as in supportive housing options are more effective interventions whenever possible and should be utilized as a part of any comprehensive plan to reduce homelessness and meaningfully address the impacts of homelessness on the community.

OTHER SUPPORTIVE SERVICE BARRIERS

There were several other barriers to supportive services identified by stakeholders, including language and cultural barriers as well as administrative requirements that are difficult for some people experiencing homelessness to complete on their own.

Given the limited staffing for supportive services, there may not be people who speak a participant's spoken language. For some individuals, culturally it may be harder to trust someone not from their community or who does not speak their language. Reportedly, they can sometimes find help in a local community church if not through the Continuum of Care. In some instances, the local church stands in the shoes of social services.

Surveys completed by people experiencing homelessness indicated that when a person calls or applies in-person, the availability of help is highly dependent upon whether funds are available. People with lived experience also indicated that many of the resource lists available to them were not kept current or were misleading. A resource list might make it appear that providers and churches could help, but after they expend the energy to get to them, they would find that very few had resources available or were very helpful. The system was not always easy to navigate and often one place would refer them to another or send them

"Many don't have licenses, birth certificates, IDs, addresses or phones and can't get a lot of help if [they are] just in the street."

— Focus group participant

away. In contrast, peer support and guidance were identified as being helpful.

Survey respondents also shared their frustrations of remaining on waiting lists (for some up to 1½ years), with very little supportive services and less communication than they would like while waiting to be placed. Some people experiencing homelessness said more help for persons convicted of felony offenses who want to get jobs would be especially helpful. The City of Norman noted that it refers convicted felons and sex offenders through a warm hand-off to Oklahoma City partners who offer services and work closely with the City of Norman. However, with only one full-time

"[There is a] lot of paperwork and requirements. There could be assistance to shorten and make faster"

— Focus group participant

staff person until very recently, the City of Norman has had challenges to staffing and communication.



When people experiencing homeless were surveyed and asked what would be most helpful to them, in addition to transportation (73%) and help paying rent (65%), 39% would like help accessing public benefits, 35% indicated they need help with health care or medicine, 33% needed mental health services, 22% wanted help finding jobs, and 8% would benefit from legal assistance.

Recommendations

- Expand effectively coordinated countywide street and encampment outreach.
- Ensure existing outreach teams provide access to housing-focused case management, Coordinated Entry, HMIS, public benefits enrollment and other critical housing-focused resources.
- Coordinate interdisciplinary outreach teams comprised of a mix of staff from different disciplines - street medicine, social work, nursing, housing navigation – to build trusting relationships, provide medication management, and help with document readiness.
- Consider funding and staffing a mobile outreach van program that includes medical, behavioral health, and housing navigation services and can access people experiencing unsheltered homelessness and homelessness outside of urban areas.
- Develop a peer support program as part of an interdisciplinary approach that trains and uses peers with lived experience of homelessness for street outreach and system navigation.
- Deepen housing-focused emphasis and programming at locations where people experiencing homelessness regularly access.
- Ensure staff trained on housing-focused approaches and housing navigation are available at crisis shelters, health centers, day centers, transit centers, and library.
- Expand intensive case management supports for housed individuals with high needs. Include as part of the planned job description for case managers time to conduct street outreach.
- Establish a shared community-wide understanding across all homelessness service providers of best practices for implementing housing-focused approaches, including housing-focused training and case planning.
- Strengthen coordination with mainstream resources such as legal aid, credit repair services, public benefits advocacy and appeals, workforce development and community volunteers.
- Emphasize provision of supportive services and case management to complement hotel/motel vouchers.



- Evaluate and revise salaries and benefits for case managers to ensure that Norman/Cleveland County can recruit and retain qualified staff.
- Work with State and local systems to ensure there is adequate communication and planning in place to prevent discharge into homelessness and/or provide services to those who are discharged.

TRANSPORTATION TO EMPLOYMENT, SERVICES, AND SHELTER

Many of the services and housing options in the region are concentrated in certain parts of the county. These resources are often inaccessible for people experiencing homelessness who live outside of those areas. The lack of affordable, reliable public transportation between areas is a significant barrier for low-income households and people with disabilities living in Norman/Cleveland County. It also restricts the viable locations for creating new housing resources for people who are low income or experiencing homelessness and who need to be near transit centers and services.

Across the board, stakeholders identified transportation as a significant issue in the County. Providers and focus group participants both identified the lack of transportation as a key challenge for people trying to end their homelessness. It poses barriers to finding and maintaining employment and to accessing needed services and assistance. Some shared that transportation exists to get to the main downtown supportive services and shelters, but that transitions from other services were not supported by the current public transportation system.

There are some situations where the lack of transportation is particularly acute. Stakeholders mentioned that releases from correctional facilities occurred from sites that are not on the transportation line at all. And even when they are on the

transportation line, discharges from the criminal justice system and the state hospital often happen during hours where the system is not running. Other stakeholders shared that when people are sheltered by

using motel/hotel vouchers, the areas where the hotels are located have no public transportation access. Additionally, some of the apartment complexes where service providers are helping to place people who are homeless have no bus stops nearby.

For people who need to access case management, behavioral health, and health care, a lack of transportation access creates a barrier to services. When people cannot access transportation, they are unable to make their appointments, which usually require them to be in-person at the organization providing the services. Service providers and outreach workers spend considerable time transporting

"We don't have transportation to begin with – the bus that runs to where I live only runs half-way there – so I have to get off and walk a half mile to get home."

— Focus group participant

"Transportation to connect to services for those outside of Norman is very hard for those experiencing homelessness from Moore, Noble, Lexington, etc."

— Survey respondent

"I have no health insurance and no transportation, so my body usually feels exhausted when trying to get to important appointments."

— Focus group participant



clients to appointments, but significantly more transportation support is needed to help people get to appointments and access benefits and services.

Focus group participants said that it was difficult to learn the bus system schedule if they did not have a smart phone, which many of them did not. They also identified the transportation system as one place where they had experienced discrimination, with one individual sharing that they rode a bus to an appointment and upon return from the appointment, the bus driver refused to stop at the location downtown near the shelter, telling them that they had already been on the bus too much that day.

Twenty-three percent of community members who participated in the community survey identified transportation challenges as one of the top three barriers to addressing homelessness. However, people with lived experience were surveyed and three out of four people experiencing homelessness indicated that transportation assistance would be the most helpful service provided.

A majority of people experiencing homelessness who responded to the survey indicated that if money were not an issue, a bad location that was either unsafe or where there was lack of transportation would be a barrier to accepting a housing placement. When asked what services would be the most helpful, nearly 100% said transportation. This aligned with the feedback from the focus groups.

Recommendations

- Develop a comprehensive transportation strategy in partnership with local transit authorities that considers the transportation needs of people experiencing homelessness.
 - Convene additional focus groups of people experiencing homelessness, people recently housed, people living in permanent and transitional housing sites, and people living in public housing in the City of Norman, as well as in outlying areas throughout the County to better understand their needs.
 - Develop a coordinated transportation plan that ensures all individuals experiencing homelessness can affordably and reliably access services and supports.
- Create a program/expand existing programs that provide(s)
 discounted or free transit passes to people experiencing
 homelessness to ensure transportation is affordable, especially
 once the pre-COVID-19 fare structure is reinstated
- Consider developing a subsidized ridesharing program or creating a van service for individuals experiencing homelessness/recently housed.
- Provide visible, easily accessible information about transit schedules that does not require a smart phone or access to the internet.
- Work with health care providers to enable transportation to and from medical appointments.



- Develop uniform decision-making guidelines for outreach teams providing assistance with transportation.
- Set up and identify locations where personal belongings may be stored and where pets and service animals may be cared for while individuals access services and resources.

COORDINATED PREVENTION ASSISTANCE

Living without stable housing, even briefly, is a traumatizing experience, and many never recover from the physical, emotional, and financial impacts. By preventing homelessness, Norman/Cleveland County can help individuals and families avoid the economic, social, mental, and physical challenges that result from homelessness – often at a much lower cost than it takes to serve people after they lose their housing.

Effective prevention requires having adequate safety net services in place to address needs before they escalate to crises.

Prevention involves adequate cross-sector collaboration, including with schools, the child welfare system, public health/emergency rooms, mental health care facilities, public benefit programs, etc. It also includes increased awareness and attentiveness to housing stability as well as effective transition and/or discharge planning.

Systems should work together to ensure that individuals are effectively connected to mainstream resources to reduce the risk of homelessness.

"We are not preventing enough. I am not aware of any prevention resources that are being pursued."

— Survey respondent

Many people who are experiencing homelessness come from households living on the economic margins who routinely face choices between housing and meeting other basic needs, which are households unable to accumulate a savings cushion. Of the people experiencing homelessness who were surveyed, more than two out of three respondents said they needed help paying rent. Of the stakeholders surveyed, close to 65% somewhat or strongly agreed that they or someone they knew had been concerned about finding an affordable place to live. Over 70% somewhat or strongly agreed that many people in their community could be just one or two unforeseen circumstances away from becoming

"Often people are right on the brink who can be helped and that doesn't happen as there are no prevention resources."

— Stakeholder

homeless. Prevention programs are necessary to counteract this prevalent instability and prevent a housing crisis from escalating further into homelessness.



Prevention programs currently exist within Norman/Cleveland County that are addressing some of this need; however, stakeholder interviews along with the data reviewed demonstrate that this area is under-resourced given the level of need. HUD Emergency Solutions Grant (ESG) funding can be used for prevention assistance and is tracked through the CoC's HMIS. There are other prevention programs in the community that are not tracked through HMIS. The CoC allocates approximately \$170,000 in ESG funding to Food and Shelter and Thunderbird Clubhouse to provide prevention and diversion services, including housing

"Prevention funds are scarce to come by... to help people not fall back into homelessness."

— Survey respondent

relocation and stabilization services, short and/or medium-term rental assistance, rental arrears, rental application fees, security deposits, advance payment of last month's rent, utility deposits and payments, moving costs, housing search and placement, housing stability case management, mediation, legal services, and credit repair as necessary to prevent the individual or family from becoming homeless. In addition, other programs are trained to provide diversion assistance through conflict resolution and problem-solving conversations.

Despite programs having limited or in some cases no prevention resources, stakeholders, and individuals with lived experience of homelessness reported that the service providers are able to effectively help many households prevent homelessness. In addition, there are also faith-based organizations in the area that provide prevention services. During the height of the COVID-19 pandemic, the United Way of Norman created a COVID-19 relief fund to help keep families in their homes with rental assistance. HeartLine is the area's 211 service, which connects callers to area resources, including any available prevention resources.

Despite these efforts, the CoC's Fiscal Year 2020 System Performance Measure that measures how many people become homeless for the first time each year showed that 265 individuals entered the homeless system of care who had not been in the system before (or had not been in the system for at least the 24 months prior). This indicates that the current resources are still not meeting the existing need.

Recommendations

- Involve philanthropy, service organizations, and the faith community in supporting critical initiatives, such as public engagement campaigns, and raising funding for flexible housing, risk mitigation funds, and volunteers.
- Expand, integrate, and improve the effectiveness of prevention and diversion efforts to reduce the burden on the system of care.
- Continue to leverage prevention and diversion programs to allow the system to reserve limited beds in shelter and housing programs for those that need additional support to regain housing.
- Establish a coordinated homelessness prevention and problem solving (homelessness diversion) system to help people at high risk of homelessness remain housed. Expand on the work being done in CCM and CoC Board planning meetings.



- Emphasize established prevention system protocols for identifying, prioritizing, and serving households at risk of homelessness. Use HMIS/CES data and provider input to identify characteristics of atrisk households
- Align resources for prevention and identify gaps in availability of crucial resources per individual ESG policies in Written Standards.
- Provide regular training for all stakeholder partners in problem solving conversation techniques, including all access and outreach points.
- Establish a monitoring protocol, including a field in HMIS to identify households who fall into homelessness for the first time, and to track impact of interventions.
- Strengthen partnerships with criminal justice, child welfare, and health care systems to coordinate support people at high risk of homelessness to avoid discharges into homelessness.
- Increase support for formerly homeless households with intensive service needs to attain long-term housing stability.
- Expand access to income, including employment and benefits, for people experiencing homelessness and recently homeless households.

ROBUST DATA COLLECTION AND ANALYSIS

Sound decision-making and evaluation of outcomes both require access to reliable, valid data. Without access to such data, decision makers do not have the proper basis to make informed choices necessary to guide planning processes, prioritize resources, or evaluate and measure performance in a manner designed to increase the likelihood of preventing or ending homelessness. In addition, key funders—including state and federal governments—rely on data collected through the Point-in-Time count and System Performance Measures, to allocate limited resources. It is imperative that CoCs develop and implement policies, procedures, and systems to ensure that quality information is contained within the HMIS. The responsibility extends to every HMIS-participating agency to commit the resources necessary to collect and contribute timely data accurately.

"Data quality" refers to the reliability and validity of client-level data as collected and maintained within the community's HMIS. Where data quality is high, it will accurately reflect the circumstances of persons experiencing homelessness in the real world, enabling CoC leadership to make the decisions necessary to improve the overall system of care and impact the lives of individuals and families in a positive manner.

The City of Norman is the HMIS Lead agency for the City of Norman/Cleveland County CoC. To ensure that data meets appropriate quality standards, HMIS Lead Agencies — with input from stakeholders, including all HMIS-participating agencies — typically develop Data Quality Plans that are formally



adopted by the CoC as a whole. Data Quality Plans establish expectations for both the community and end users to capture reliable, valid data on persons accessing the homeless system of care, which:

- Identify the responsibilities of all parties within the CoC that affect data quality;
- Establish specific data quality benchmarks for timeliness, completeness, and accuracy;
- Describe the procedures that the HMIS Lead Agency and HMIS System Administrator will take to implement the Plan and monitor progress to meet data quality benchmarks; and,
- Establish a time frame for implementation to monitor the quality of data on a regular basis.

The quality of data is determined by assessing the (1) timeliness, (2) completeness, and (3) accuracy of the information. In addition to addressing these three core determinants of quality, Data Quality Plans also include provisions related to (4) monitoring and (5)

"There is really good system in place [the VI-SPDAT] but it's not clear that it's being followed."

— Survey respondent

incentives/enforcement. Data Quality Plans should be developed as part of a community-wide discussion, in order to generate stakeholder buy-in and ensure that the data itself will meet the needs of the CoC.

Currently the CoC does not have its own Data Quality Plan, but the City of Norman/Cleveland County CoC works with Information Services of Oklahoma (ISOK) as their HMIS System Administrator. To help participating agencies succeed and ensure that their CoC partners meet the high standards necessary to successfully accomplish its work, ISOK developed a "Sharelink HMIS Policies and Procedures Manual." The Manual includes a data quality section. Within the data quality section, the Manual lists the core minimum standards for data quality, timeliness, and completeness. The data quality section is incorporated into each of the City of Norman/Cleveland County CoC agency's memorandum of agreement (MOA) with ISOK, which every agency that joins HMIS must sign.

Throughout the Gaps Analysis process, it was determined that several challenges and barriers exist in gathering and maintaining accurate, timely data within Norman/Cleveland County's system of care. Many participating agencies reported that they do not have an adequate number of resources to input HMIS data in a timely and accurate manner. In some cases, they over-rely on the HMIS Lead and, to a lesser extent, the System Administrator to enter or correct data. The practice appears to be commonly accepted throughout the CoC. However, the further removed data entry is from real-time – from when and how events occur – the less likely it is to be accurate, especially if it is being entered by an entity other than the one working directly with individuals and families.

It is important that all stakeholders have a shared commitment to ensuring that the CoC obtain and preserve good quality data so that the CoC can understand who they serve, whether they are succeeding, how and when to make changes, as well as to ensure compliance with funders to maintain or increase resources to do the important work.

It appears, however, that there is a lack of understanding by some staff and organizations about the importance of data quality and about some of the fundamental aspects of the HMIS system and required HUD reporting. The HMIS System Administrator provides regular training to HMIS partner agencies, but that may not be sufficient to ensure that the CoC is meeting the highest data quality standards expected by HUD.



The CoC has a Data Committee that is charged with overseeing aspects of how data is collected and maintained. However, it is unclear if and how the Committee evaluates and monitors performance and whether they truly can incentivize or enforce data quality within the CoC. Additional clear roles and responsibilities around data quality could serve as an incentive to full HMIS data participation.

CoC processes currently supporting data quality include:

- Each participating HMIS agency must sign an MOA that incorporates data quality requirements, including timeliness and completeness, into the agreement.
- All HMIS users are required to receive initial training which includes entering the HUD universal and program specific data entry elements.
- Prior to COVID, quarterly and as-needed HMIS training were offered to both new users and as a refresher to existing users in the City of Norman/Cleveland County. In addition, the training was provided monthly at the Homeless Alliance in Oklahoma City with invitations to Norman agencies. The full CoC membership receives these invites and are aware of the mandatory training staff must have to comply with HMIS standards.
- Prior to COVID, there were monthly data quality meetings where the City of Norman HMIS
 Lead met with participating agencies. Each quarter ISOK, the HMIS System Administrator,
 also provided a Q&A session during the meeting to provide answers to agencies' particular
 questions and issues. The sessions also included instruction on running and reviewing
 federal reports generated by HMIS. All HMIS participating agencies were required to attend
 the meetings.
- Since COVID, the CoC has held at least two HMIS training sessions per month, which are
 offered online. The trainings are open to both new users and to users seeking refresher
 training. The CoC also offers online training videos that cover HMIS data entry that can be
 accessed in each of the HMIS' tabs.
- ISOK corresponds with HMIS-participating agencies one-on-one to answer questions on data entry, correction, requirements, reporting, grant requirements, etc. ISOK has significant interaction with each HMIS participating agency on a monthly/quarterly basis. They also offer HMIS reporting training every other month to assist staff with reporting responsibilities.

There are also opportunities for the CoC to use the data collected for HUD to help improve systems overall. The CoC can utilize and analyze the data to ensure their programs are meeting the needs of individuals and families experiencing homelessness and housing insecurity in the community. The CoC currently uses data as needed when making decisions using annual data or CES data when making recommendations to the CoC Board or Governance Committee. However, in addition to this type of data-based decision-making, regular performance and evaluation should occur.

The Data Committee should regularly assess the CoC's System Performance Measures (SPMs) and design custom local performance measures that may be more responsive to various issues in Cleveland County or within the City of Norman. For example, one common CoC performance and evaluation plan might include:

- Bi-annual in-depth project-level assessment during the CoC Program competition and as a midyear check-in to help projects and the CoC make adjustments as needed.
- Quarterly SPM check-ups to help the CoC be responsive to new trends (i.e., an increase in first time homelessness or a decrease in income) and to take steps to address them promptly; and
- Incorporate the use of longitudinal system analysis (LSA) data into data reports.



There are some systems in place to ensure data participation and data quality in the CoC. More can be done to ensure that data is timely, complete, accurate, and used to improve the performance of the CoC.

Recommendations

- Revise data quality standards and develop a more robust, clear, and transparent CoC "Data Quality Plan" that establishes expectations for both the community and end users to capture reliable, valid data on persons accessing the homeless system of care. A formal CoC Data Quality Plan will:
 - Enable more formal and structured data quality policies and procedures with incentives and enforcements;
 - Clarify that that data quality is the responsibility of the agencies of the entire CoC and not only a City of Norman and/or ISOK;
 - Establish specific data quality benchmarks for timeliness, completeness, and accuracy;
 - Describe the procedures that the HMIS Lead Agency and HMIS System Administrator will take to implement the Plan and monitor progress to meet data quality benchmarks; and,
 - Establish a time frame for implementation to monitor the quality of data on a regular basis.
- Revitalize the CoC's Data Committee with a clear mandate and expectations. The Data Committee should:
 - Oversee HMIS data quality;
 - Expand HMIS bed coverage;
 - Oversee ISOK's regular efforts to train, monitor, and oversee participation in the HMIS, including data quality, and
 - Develop, monitor, and oversee system performance measures.
- Reevaluate PIT count methodology, especially with respect to the chronic homeless status of residents in emergency shelter and unsheltered situations.
- Review data entry and data quality requirements for HMISparticipating homeless service providers to improve local understanding of the scope of chronic homelessness in Norman/Cleveland County.
- Develop and deliver appropriate training and support resources (including technical assistance) to all HMIS-participating agencies.
 - The CoC should be prepared to support agencies to adopt internal policies, procedures, and practices as necessary to ensure the development of high-quality data
 - The CoC should work through the Data Committee to draft and deliver new training and support resources required to carry out the new Data Quality Plan.



- If data quality metrics are not met, require agencies to participate in additional training and ascertain what additional support and resources those agencies need
- Develop data quality benchmarks. The Data Committee should incorporate into the CoC's own detailed manual baseline benchmarks and provide regular updates to each HMIS-participating agency on the current progress toward the specific data quality benchmarks established in the CoC Data Quality Plan at an agency, program, and individual user level.
- Develop incentives and establish a monitoring structure. Once the
 Data Quality Plan has been drafted and adopted with benchmarks
 and timelines, the CoC should implement appropriate incentives and
 establish a monitoring structure to regularly assess the collection,
 entry, and quality of the data contained in the HMIS. Examples
 include:
 - Regular review;
 - Public reporting and recognition (i.e., monthly report cards);
 - Corrective Action Plans;
 - Continue scoring incentives in funding competitions (projects with highest data quality more likely to receive funding); and
 - Funder-imposed sanctions (Collaborative Applicant/Administrative Entity report to funder – possible suspension of funds, etc.).
- Seek out additional resources for HMIS to subsidize license costs and consider a program to sponsor agencies based on need to make HMIS participation more financially accessible to a diverse range of stakeholders. Consider requiring organizations that want to place their clients in housing to participate in HMIS if a subsidy is available.
- Produce aggregate data reports, at least quarterly, which can
 provide public information about the numbers of people being served
 by the homeless system of care and/or placed in stable housing,
 including demographic information.
- Evaluate, track, and implement training and program modifications to address any disparities in system access and service provision for special subpopulations, including for people of color, non-English speakers, and persons who identify as LGBTQ+. Improved data quality will allow for more robust analysis of potential racial and ethnic disparities among the homeless population to inform policy decisions as the City and CoC work to address any systemic inequities.



COORDINATION AND COMMUNICATION TO ENSURE EFFECTIVE USE OF LIMITED RESOURCES

One area where improvement could make a difference in the effectiveness of the homeless system of care without a large investment of resources is coordination and communication within the CoC and between the CoC and the broader community. As previously discussed, there is a wide variation in terms of how people feel about the existing structure and efforts to address homelessness within the CoC, the City of Norman, and the broader system of care in the region; however, the vast majority of people who participated in the gaps analysis were passionate about addressing homelessness and finding solutions.

Within the CoC there is a core group of organizations providing emergency shelter, housing, and supportive services. Community meetings are advertised in paper, online, and on social media. Enhancing that work, some CoC members undertake outreach for people living unsheltered throughout the community and in encampments. The City of Norman/Cleveland County have a significant number of active organizations that engage with the CoC; however, there are also community-based organizations and advocacy organizations working to support homeless individuals and/or to end homelessness who are not part of the CoC's more formal efforts. As coordination and partnership expands, data confidentiality is one key area that must be addressed.

"There needs to be more direction in the CoC, and the Board needs to have a clear role for all the partners. A voice for the CoC Board is needed."

— Stakeholder

"Communication is good in the inner circle, but not good communication with all the others who are not part of the CoC but still working with the [homeless] community."

— Stakeholder

Generally, those who are a part of the CoC feel positive about local efforts – including weekly Coordinated Case Management meetings to discuss the by-name list, as well as formal and informal regular efforts to coordinate and collaborate across organizations – and are hopeful about the ability of the CoC to continue to reduce homelessness. However, there is not consensus amongst the active CoC

groups about how to work best with the broader community. Moreover, because funding from the CoC and private partners is limited, there is some competition for resources that impacts organizations' abilities to collaborate with one another.

Amongst the critiques, stakeholders shared that there is insufficient transparency about the activities of the CoC, that the community could benefit by broadening the circle of organizations who coordinate efforts, that more outreach and information is necessary for people experiencing homelessness, and that public misperceptions about homelessness exacerbate the community tensions. Most commonly CoC stakeholders felt that additional community engagement was necessary to overcome these issues.

"There are obviously a lot of people who care who are trying to help. We just need to make sure we are communicating with one another and building systems of care that are sustainable and do not just offer a small group of volunteers who are over extended."

— Survey respondent



At the same time, most agencies can improve their coordination efforts so that the City and CoC have the information needed to update the broader community on homeless efforts. A few stakeholders shared that they are not always aware when partner organizations have staff turnover or hold relevant events. These things may be posted on an agency's website, but often are not shared.

COC TRANSPARENCY

A number of stakeholders lauded the communication between active CoC members but expressed concern that there was not adequate communication between the CoC and the other groups working in the homeless system of care, as well as the public at large. People shared that the lack of transparency

made it more difficult to get community support for the efforts the CoC pursues. They mentioned that an area that was still fairly opaque was the City of Norman processes around homeless funding. Certain funding streams have allocation processes that are determined by the regulatory framework of the funder, such the Emergency Solutions Grant and Continuum of Care Programs. In both cases, the CoC is the body that makes the funding determination, and the City of Norman acts as the facilitator of the competition. A transparent, public process is required to maintain that funding. However, both those programs

"Community meetings should be held to help us understand the impact of homelessness on not only individuals, but the community itself."

— Survey respondent

have fairly complex requirements so stakeholders or community members who are unfamiliar with these funding streams may find the processes somewhat difficult to understand and navigate in the beginning. Other homeless funding administered by the City of Norman, including General Fund and the Community Development Block Grant program, all have public processes to review and award funding.

Another area that stakeholders felt could be improved was the flexibility and openness to feedback from CoC leadership. They felt that the internal processes were generally good, but that when there was constructive criticism from the broader community, the CoC would benefit from more dialogue, open mindedness, and flexibility for trying different strategies. The City of Norman shared that they plan to work out a respectful, meaningful way to have a dialogue that will also prevent individual staff from feeling targeted.

A number of stakeholders mentioned a divide between the City of Norman and some members of the community, recognizing that it needs healing, time and attention; that there are specific agencies and organizations that also need to do work on that front.

Some stakeholders did not understand why the work around homelessness was happening more at the city level. They wondered why more resources were not being distributed amongst the nonprofit providers to undertake the activities, rather than have those resources be housed at the City of Norman.



BROADEN ENGAGEMENT AND KNOWLEDGE OF HOMELESS SERVICE PROVIDERS

While the community has established a strong foundation for coordinated partnerships between providers through the Continuum of Care, greater investment and collaboration is needed by jurisdictional and system-level stakeholders to collectively achieve shared goals.

There is a group of CoC members and stakeholders who meet weekly who collaborate, cooperate, and coordinate to support one another and people experiencing homelessness. However, there are other organizations that work in the arena who are not involved in the CoC and who are not engaged in the coordinated efforts. Stakeholders felt there was a gap between the two different groups and that efforts could be made to bridge the divide and broaden participation in the CoC. CoC members also expressed a desire to increase participation in the CoC and connect with organizations that currently were not actively involved in the CoC. Confidentiality is one key area that must be addressed as broader coordination efforts are developed.

Stakeholders noted that the City of Norman/Cleveland County is a small area and that "everyone tends to know each other" who works in this sector. These personal connections and relationships can facilitate further collaboration and partnership but can also cause some

"In order to make any sort of change in the community, the right kind of people need to be at the table. Every stakeholder from faith-based agencies to law enforcement, from city official[s] to parent[s] from the community. They all need to be part of the coalition, to provide input, and help strategically plan strategies to prevent or reduce the risk of homelessness."

— Survey respondent

underlying friction. Many stakeholders recognized that there are some tensions with local advocates and the City. A frequently cited example by both persons with lived experience and providers was that one advocacy group warned persons experiencing unsheltered homelessness not to use the warming shelter that was run by the City of Norman despite it being the only low-barrier shelter and the only one with

Others noted that there can at times be a divide between the faith-based and the non-faith-based community that makes it more challenging to collaborate community-wide.

availability during some inclement weather last season.

Some stakeholders questioned whether policies and protocols around the by-name-list, the prioritization process, and Housing First were being followed as diligently as they should be. Currently the by-name list is sent to all CoC partners weekly. Trainings on the by-name-list protocols for

"There is a friction between the faith-based communities and the non-faith-based organizations that has prevented more effective collaboration."

— Stakeholder

all CoC staff is conducted on a regular basis. Similarly, all CoC partners should participate in the weekly by-name-list meetings. Organizations need to timely respond to requests to report data about clients to ensure that the list is current and reflects the best information available to partners.

Stakeholders also noted that it would be beneficial to do renewed best practice trainings and open them up to all interested parties from the homeless system of care, including those not traditionally involved in the formal CoC. Trainings that are currently available to partners include, Housing-first/low-barrier implementation, trauma-informed care, motivational interviewing, and in-services to help staff know the



right time to reach out to legal aid or get involved before a household might get evicted. CoC stakeholders also suggested the possibility of conducting formal facilitated discussions between CoC providers and interested community partners.

Another issue that came up was the uneven geographic distribution of housing and services. Most of the available shelter beds and supportive services are concentrated in the City of Norman; however, other areas in the county, such as Moore, were identified as having additional needs. The City of Moore is engaged in the CoC, which handles referrals from Moore. Unfortunately, there are currently no services offered in Moore at this time.

Ensuring that CoC resources are equitably distributed and that entry into the system is available throughout the geographic area are important considerations for the CoC for the future.

"I find it interesting that in most communities that things happen at the county level — lots of other communities that things are happening at the county — why is that not happening here? In those places it is happening at the state level too. Would love to see more of that in the [Cleveland] community."

— Stakeholder

Participants also raised the question about the participation of Cleveland County in addressing homelessness and within the CoC. Stakeholders shared that the Sheriff's office participates in Coordinated Entry for the population they serve, but that the County could play a greater role providing mental health and substance use services and collaborating generally on homelessness.

OUTREACH FOR PEOPLE EXPERIENCING HOMELESSNESS

When asked about what can be improved, a number of stakeholders noted that they would like to see more engagement with the community, educating them about the CoC's services. They indicated that providing more robust resource information to the community at large, including community members, community-based organizations, and faith-based organizations, would help provide a baseline understanding of the services that are available to help connect individuals in need of services.

There have been public engagement events and public meetings offered to the broader community, particularly before the COVID-19 pandemic. In 2019, the CoC hosted over 60 different public events at library conferences, public schools, assisted living establishments, area businesses and other venues, with little to no attendance from organizations and individuals outside the CoC. Given that response, additional types of outreach efforts may be needed, and perhaps the release of the Gaps Analysis can be leveraged to engage the community.

"It seems as if we don't get enough responses to what our care or concerns are."

— Focus group participant

It does appear from the focus groups that there are individuals experiencing homelessness who are unaware of the breadth of housing and services that are available in the City of Norman/Cleveland County. Additionally, one stakeholder noted that most of the surrounding areas outside of the City of Norman offer minimal services and people in those communities lack information about what is available in the City. An agency also reported that when they go to the west side of the City to provide services, most of the people they serve are not aware of what the wider community has to offer.



During focus groups, participants were asked how they first found out about shelter and services and where to get help. Most participants shared that they learn about where to get help by word-of-mouth from other people experiencing homelessness. Once people are connected to services, they frequently learned about other organizations through the providers they interacted with. However, few identified the source of information being the CoC or Coordinated Entry. Similarly, when people with lived experience of homelessness were surveyed about how they find help when they need it, most people said word of mouth, while a handful of said they found information about shelters from the internet or Google.

"If organizations had more information about other organizations. Better community ties and communication between organizations."

— Focus group participant

A gap that became apparent was that there is not sufficient information for people experiencing homelessness about the broad array of help that is available. This applies not only to housing navigation or case management, but also to assistance with document readiness, job skills and life skills training, negotiating landlord relationships, accessing benefits, etc. In one of the focus groups, a participant acknowledged that they slept outside a shelter for days that was full because they were not aware of the warming shelter that had availability nearby.

Some people experiencing homelessness strongly suggested that the community could benefit from a peer-support model, where people formerly homeless provide assistance, could build trust, and had knowledge of what people were going through. Some had experience with similar programs in other communities and highly recommended it as a model.

EDUCATING THE PUBLIC ON THE CAUSES AND CHALLENGES OF HOMELESSNESS

Homelessness is growing and there are many myths and misconceptions around why people are homeless and the programs and services that work best in solving the problem. Rising costs of housing,

combined with wages that are not keeping pace, are among the main causes of increasing rates of homelessness. A deeper understanding of homelessness and its solutions will strengthen community support for critical next steps, as well as help begin the process of resolving some of the persistent confusion surrounding this issue within the community.

"There is a great deal of public education that can take place in recognizing that there is no one solution in addressing homelessness."

— Stakeholder

Community survey respondents were asked to identify the biggest roadblocks that prevent Norman/Cleveland County from ending

homelessness. Amongst the top reasons, more than one in three respondents felt that "negative stereotypes about people experiencing homelessness" was one of the biggest roadblocks to ending homelessness.

There is also disconnect in both service providers and the broader community that many people do not want help even when it is offered. Some stakeholders shared that building a better understanding of the trust needed and supportive services required to be able to support people once they are housed could help the broader community understand the need for longer term, more intensive services for them to transition to stable housing.



Many of the community members surveyed, especially those who do not work with people experiencing homelessness and/or do not know someone who have experienced homelessness, had the perception that people experiencing unsheltered homelessness do not want to be housed.

Other stakeholders surveyed and interviewed who work within the homeless system of care reported that, in their experience, the requirements attached to some housing programs, such as income requirements, identification documents, employment, sobriety, and mandatory service participation (i.e., required chores, meetings, etc.), can act as a barrier for unsheltered individuals, especially those who are chronically homeless and experiencing severe mental illness. Several interviewees expressed the belief that reducing barriers in housing and creating additional low-barrier opportunities would increase the likelihood of housing many of the currently service resistant unsheltered population. Other CoC members noted that they were working hard to place clients with housing challenges through a one client at a time approach, recognizing that removing barriers does not happen overnight.

Individuals who were currently experiencing homelessness in the area or who had recent lived experience provided further in sight on these issues. The vast majority of unhoused survey participants said they would be interested in any housing if it were available. Focus group participants shared a deep interest in being housed. When asked why they felt there was still a significant population of individuals living unsheltered, the most common answers were untreated mental illness, the barriers within existing programs (i.e., no pets or partners allowed, sobriety, identification requirements, inadequate storage, etc.) and the lack of access to market rate rentals, including inequitable treatment from landlords and others based on their homeless status, race/ethnicity and/or gender.

There will always be some individuals who are unsheltered who persist in being resistant to offered housing, supports and other interventions. In many cases, long-term client-centered outreach utilizing principals of harm-reduction and trauma-informed care are needed to develop trust and build relationships before progress can be made, particularly where they have long histories of homelessness or have serious mental illness. Peer outreach and multi-disciplinary teams, including individuals with

"We need to shift the attitude in our community of people thinking those who experience homelessness are lazy or choose to be there. We need to educate people in the community to understand that the nuances of mental health and substance abuse conditions that lead to homelessness are complex and profound. We need to encourage awareness and compassion."

— Survey respondent

"There are a lot of myths about homelessness...With the general public there is a feeling of — they are homeless because they want to be so why should we spend time and effort on them. [That is the] prevailing...attitude."

— Stakeholder

mental health expertise and others with tangible supports, such as nursing, medication support, etc. can be particularly useful in establishing the needed connections.



- Create formal mechanisms to support transparency about the CoC to the broader community. They might include:
 - A dedicated comprehensive website that represents the CoC
 - A weekly column in a local newspapers or e-newsletter
 - A calendar of events published on the City of Norman's website, a new CoC website, and/or in local newspapers.
- Agencies will need to contribute relevant information
 - A quarterly insert with a list of services available for information and referral with contact information.
 - Profiles of people with lived experience who have been helped by the CoC that can be shared with newspapers, on the CoC website, the City of Norman's website, and in other locations to highlight success stories, that complements what is already occurring through partner organizations.
 - Continue to provide updates at least quarterly of CoC activities at the Ad Hoc Committee on Homelessness, CoC meetings, and published on the CoC website with performance data.
- Include success stories, challenges, key policy decisions, allocations, announcements of new staff, available resources, housing opportunities, etc. on the CoC website, the City of Norman website, at the public library, and other public places frequently visited by individuals experiencing homelessness.
- Continue posting Point-in-Time Count/System Performance Measure/Data Quality reports on the CoC website, the City of Norman website, and other CoC-participating agency websites.
- Involve philanthropy, service organizations, and the faith-based community in supporting critical initiatives such as public engagement and education campaigns, raising funds for the flexible housing and risk mitigation funds, and volunteer opportunities.
- Undertake a community engagement campaign that includes landlords, people recently housed, the business community and other leaders.
- Establish a lived experience advisory board, comprised of people currently experiencing homelessness or with recent lived experience who can provide feedback to the CoC and be involved in policymaking and allocations processes within the CoC.
- Provide a leadership coach to staff of the City of Norman to help facilitate interactions with community members that are highly critical of the work of the CoC



Recommendations

- Create and fund peer-based supportive services that recruit people with lived experience to participate in the CoC by providing services and navigation support to people who are currently homeless.
- Develop resource materials and educational information that can be available online and distributed at the public library, at transportation sites, and other places where people experiencing homelessness or at risk of homelessness can learn more about the variety of organizations and services in the community.
- Create a communications campaign to improve public understanding of homelessness and the local response and to promote dialogue and collaboration:
 - Develop educational materials and training opportunities
 - Disseminate and publicize the Gaps Analysis, using the process as an opportunity to increase community-wide understanding of the causes of homelessness and the characteristics of the homeless population in the area and to promote dialogue about potential solutions
 - Host a community forum reviewing the key findings of the Gaps Analysis, gather feedback on proposed solutions, and focus on building consensus around action steps
 - Update survey takers and interviewees on key findings
 - Use Gaps Analysis as a platform to develop long-term strategic action plan and to move community towards collective action
- Include introductory information about homelessness when collecting community feedback, hosting townhalls, holding hearings, or having large meetings related to homelessness to ensure shared understanding of the issue and help preemptively respond to potential guestions.
- Conduct a year-round Citywide campaign addressing common myths about homelessness and celebrating progress:
 - A consistent and comprehensive campaign over time that stresses how homelessness is an issue that impacts everyone can be an effective way to build support for new projects and increase visibility of current interventions being implemented. Humanizing the issue with specific stories and experiences, in addition to empirical data can be effective
- Create a publicly facing dashboard or scorecard that shows progress towards identified goals of services offered, people assisted, or people placed into housing



CONCLUSION

There is a tremendous amount of work happening throughout the City of Norman/Cleveland County to prevent and end homelessness. Through the Gaps Analysis process, strengths and achievements as well as potential areas for growth were identified. Seven key gaps were identified, each with tailored strategies for response: safe and affordable housing; low-barrier housing and day services; supportive services; transportation; prevention; data collection and analysis; and coordination and communication.

In each of the seven focus areas there is an extensive set of recommendations that the community can consider for adoption or improve existing efforts, as the process moves forward into developing an action plan to build out the programs, services, and systems changes presented in this analysis.

The next stage in the process is to share the Gaps Analysis with CoC partners, nonprofit organizations and other service providers, city and county officials, business leaders, neighbors, and individuals experiencing homelessness. There will be opportunities for interested stakeholders to discuss the recommendations and give input on what each would like to see prioritized and developed into specific action steps to be adopted by the CoC and the City of Norman.

Not all the proposed solutions can be implemented at once and each has differing levels of anticipated effort and impact. Additionally, many of these recommendations build off existing programs and resources or current efforts to improve the system while others will require new resources or creative new solutions. By working together to identify the most promising and timely solutions and match resources and partners to those efforts, the region can begin to lay the foundation for future success.

At this time, the region can and should reflect on the great work that has already occurred in the community over the past ten years and come together in this moment to consider action steps to better prevent and reduce homelessness and preserve the quality of life in the City of Norman/Cleveland County for all residents moving forward.



APPENDIX A: GLOSSARY OF TERMS

Annual Performance Reports (APRs)	Annual Performance Reports (APRs) are reporting tools that HUD uses to track program progress and accomplishments and inform the Department's competitive process for homeless assistance funding.
At Risk of Homelessness	At risk of homelessness is defined by the U.S. Department of Housing and Urban Development (HUD) as an individual or family who has unstable housing and inadequate income and resources to prevent them from becoming homeless. ²²
Behavioral Health	Behavioral health describes the connection between a person's behaviors and the health and well-being of the body and mind. ²³
"By-Name" List	The by-name list is a complete and inclusive list of every person experiencing homelessness in Norman/Cleveland County. It includes information collected and shared with the individual's consent like their name, history, health considerations, and housing needs.
Case Management	Case management includes assessment, planning, facilitation, care coordination, evaluation, and advocacy with people experiencing homelessness. Staff work with individuals and families to address their comprehensive needs to help them exit homelessness and stay housed.
Chronically Homeless	A person is chronically homeless who has been homeless for at least a year, either 12 months consecutively or over the course of at least 4 separate occasions in the past 3 years. To be chronically homeless, the individual or head of household must also have a disability.
The City of Norman's Ad Hoc Committee to Address Homelessness	The City of Norman's Ad Hoc Committee to Address Homelessness, is a committee of the City Council that was formed to develop a plan and strategies for addressing homelessness in the region.

²³ See https://www.cdc.gov/pcd/issues/2020/20_0261.htm



²² See 24 C.F.R. § 576.2 for complete definition of "at risk of homelessness" under the Emergency Solutions Grant Program.

Community Engagement

Community engagement is an essential and important component of homeless response activity. Centering a homeless response system's work around people with lived experience of homelessness means that the homeless response system has structures in place to ensure the direct participation from people experiencing homelessness in policies, strategies, implementation, and evaluation of the homeless response system. While there are many ways to engage people with lived experience in the homeless response system, often a formal structure such a Community Advisory Board or a Lived Experience Advisory Board that is comprised solely of people formerly/currently homeless, provides a vehicle for regular and meaningful engagement.

Community Development Block Grant (CDBG)

The federal Community Development Block Grant (CDBG) provides annual funding to states, cities, and counties to support housing and expand economic opportunities in communities. CDBG grants must benefit low- and moderate-income people, aid in the prevention or elimination of slums or blight and meet a need having particular urgency (urgent need).

Continuum of Care (CoC)

The Continuum of Care (CoC) is a group comprised of nonprofit organizations, service providers, and local government agencies that coordinates homeless services and homelessness prevention activities across a specified geographic area. Through the CoC application process, communities submit to HUD a consolidated application to fund homelessness assistance programs.

Each CoC must establish a Board to act on its behalf. It may also appoint additional committees or workgroups to fulfill its responsibilities. The CoC must develop a governance charter to document all groups created to support the CoC and each group's relative responsibilities.

A CoC's three primary responsibilities are: 1) Operating the CoC; 2) Planning; and 3) Designating and operating a Homeless Management Information System (HMIS).

Coordinated Case Management Committee (CCM)

A Sub-Committee of the CoC Executive Board comprised of CoC funded partners and key stakeholders in the community, all of whom are directly engaged with the housing process. Clients who are receive housing assistance through CCM also receive intensive case management based upon the principles of the Housing First philosophy.

CCM is the appropriate pathway approved by the CoC Executive Board to advocate all clients for prioritization, timeliness for housing placements, and appropriate funding source.



Coordinated Entry System (CES)	The Coordinated Entry System (CES) provides a centralized approach to connect the region's most vulnerable homeless residents to housing through a single community-wide assessment tool and program matching system. CE processes, deployed across an entire community, make it possible for people experiencing or at risk of experiencing homelessness to have their strengths and needs quickly assessed (triage), and to be swiftly connected to appropriate, tailored housing and services within the community. People with the greatest needs receive priority for any type of housing and homeless assistance available, including permanent supportive housing, rapid rehousing, and other interventions.
Critical Time Intervention (CTI)	Critical Time Intervention (CTI) is a time-limited evidence-based practice that mobilizes support for society's most vulnerable individuals during periods of transition. It facilitates community integration and continuity of care by ensuring that a person has enduring ties to their community and support systems during these critical periods. CTI has been applied with veterans, people with mental illness, people who have been homeless or in prison, and many other groups. The model has been widely used on four continents. (https://www.criticaltime.org/cti-model/)
Drop-in Centers/Day Services	Day centers or day services offer showers, internet access, case management, housing navigation, and other supportive services during traditional daytime hours. In most cases these services are free.
Diversion	Diversion is an intervention designed to immediately address the needs of someone who has just lost their housing and has become homeless. Diversion is a client-driven approach. Its goal is to help the person or household find safe alternative housing immediately, rather than entering shelter or experiencing unsheltered homelessness. It is intended to ensure that the homelessness experience is as brief as possible, to prevent unsheltered homelessness, and to prevent stays in shelter. ²⁴
Emergency Shelter	Emergency shelter means any facility with overnight sleeping accommodations, the primary purpose of which is to provide temporary shelter for people experiencing homelessness in general or for specific populations of people in homeless situations.

²⁴ National Alliance to End Homelessness.



Emergency Solutions Grant (ESG)	Federal Emergency Solution Grants (ESG) provide grants by formula to states, metropolitan cities, urban counties, and U.S. territories for eligible activities, which generally include essential services related to emergency shelter, rehabilitation, and conversion of buildings to be used as emergency shelters, operation of emergency shelters, and homelessness prevention services. The specific five program areas that ESG funds are: street outreach, emergency shelter, homelessness prevention, Rapid Rehousing assistance, Homeless Management Information System (HMIS), as well as up to 7.5% of a recipient's
Federal Poverty Guidelines	allocation can be used for administrative activities. Federal Poverty Guidelines are issued each year by the U.S. Department of Health and Human Services (HHS). The guidelines are a simplification of the federal poverty thresholds and are used to determine financial eligibility for certain federal programs.
Green Zones	Green zones are areas in a community that prohibit individuals who have been convicted, received a suspended sentence, or a deferred sentence for a crime to live, either temporarily or permanently. Under state law, such individuals are prohibited from living within a 2000-foot radius of any public or private school site, educational institution, property, or campsite used by an organization whose primary purpose is working with children, a playground or park that is established, operated or supported in whole or in part by city, county, state, federal or tribal government, or licensed childcare center as defined by the Department of Human Service. ²⁵
Homeless Management Information System (HMIS)	Homeless Management Information System (HMIS) is a local information technology system used to collect client-level data and data on the provision of housing and services to homeless individuals and families and persons at risk of homelessness.
Homeless System of Care	A homeless system of care is another way of describing the Continuum of Care (CoC) and the network of partners who come together to work to support people experiencing homelessness or at risk of homelessness.
Housing Choice Vouchers (HCVs)	Housing Choice Vouchers (HCVs), formerly known as the Section 8 program, are long-term rental subsidies funded by HUD and administered by Public Housing Authorities that can be used to help pay for rent.

²⁵ <u>Offender Registration Information</u>, City of Norman.



Housing First

Housing First is a well-accepted, national, evidenced-based best practice that eliminates barriers to housing, ensuring individuals and families can exit homelessness as quickly as possible. Housing First is an approach to connect households experiencing homelessness quickly and successfully to permanent housing without preconditions and barriers to entry, such as sobriety, treatment, or service participation requirements. Supportive services are offered on a voluntary basis to maximize housing stability and prevent returns to homelessness as opposed to addressing predetermined treatment goals prior to permanent housing entry.²⁶

Housing-Focused Shelters

Housing-Focused Shelters (sometimes called "Navigation Centers") help people connect long-term solutions to homelessness and address the barriers that keep them from becoming housed. The goal is to help people exit homelessness as rapidly as possible. Once housed, people can work on the underlying challenges that undermine their stability. Housing-Focused Shelters typically offer:

- Admissions policies that screen-in (not screen out) households, and welcome pets, partners, and possessions.
- Minimal rules and restrictions that focus on safety (e.g., no weapons) and ability for people to come and go, with 24-hour operations. Rule violations that are addressed through case management and behavior modification, rather than termination of assistance.
- Client-centered services tailored to support a household's ability to exit homelessness (e.g., job training, benefits enrollment), including voluntary, intensive case management geared toward helping clients obtain and maintain permanent housing as quickly as possible through a housing action plan.
- Physical layout and aesthetics that include community spaces, outdoor spaces for pets, storage for possessions, mixed-gender dormitories that allow partners to request beds next to one another, and other design elements that promote a welcoming environment.
- Staff with cultural competencies who treat residents with respect and dignity and caseloads that are kept small enough for staff to spend adequate time with each client.
- Co-location of benefits eligibility workers, health care, Department of Public Health, and other services. Partnerships with programs such as meals-on-wheels can assist with providing food.

²⁶ What Housing First Really Means, National Alliance to End Homelessness (NAEH), https://endhomelessness.org/what-housing-first-really-means/



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Housing Inventory Count (HIC)	The Housing Inventory Count (HIC) reflects the number of beds and housing units available on the night designated for the January PIT count that are dedicated to serve people who are/were homeless. The HIC provides data by program type and includes permanent housing beds and data on beds dedicated to serve specific sub-populations. The data often comes from HMIS and/or from service providers.
HUD Definition of Homelessness	The Department of Housing and Urban Development (HUD) has a specific HUD definition of homelessness that applies to the homelessness programs that the federal government funds. Under HUD programs, homelessness is defined as: people living in a place not meant for human habitation (such as an encampment, tent, or vehicle), emergency shelters, or transitional housing.
Landlord Incentive Program	Landlord incentive programs provide education and incentives to landlords to make it more likely they will rent to people experiencing homelessness. They can provide funding to support risk mitigation (compensating landlords if tenants harm their premises) and financial incentives that make landlords more likely to rent to people transitioning out of homelessness. Most programs include an education component and address racial inequities in voucher acceptance and access to housing.
Low-Barrier	Low-barrier shelters are emergency shelters that have removed most requirements/obstacles for entry into the program so that households are more likely go indoors to connect to services rather than stay on the street. For example, unhoused residents are allowed to bring their pets and possessions, to live with their partners, and do not have to exit the shelter each morning. They are not expected to abstain from using alcohol or other drugs, so long as they do not engage in these activities in common areas of the shelter and are respectful of other residents and staff.
McKinney-Vento Act	The McKinney-Vento Act is a federal statute that has a more expansive definition of homelessness than the HUD definition. The Act requires schools to track students experiencing homelessness. For public education programs tup through high school, homelessness includes people experiencing homelessness under the HUD definition, but also includes youth who are couch surfing or doubled-up (e.g., with multiple families sharing the same space).



Motivational Interviewing	Motivational interviewing is a collaborative, goal-oriented method of communication with particular attention to the language of change. It is designed to strengthen an individual's motivation for and movement toward a specific goal by eliciting and exploring the person's own arguments for change. (https://www.umass.edu/studentlife/sites/default/files/documents/pdf/Motivational Interviewing Definition Principles Approach.pdf)
Notice of Funding Availability (NOFA)	The Notice of Funding Availability (NOFA) is something that CoCs apply to every year through a competitive process in response to HUD's CoC Program Notice of Funding Availability (NOFA). After enactment of the annual federal Appropriations Act for the Fiscal Year, HUD issues a NOFA allowing all CoCs in the country to compete for funding.
	HUD awards CoC Program funding competitively to nonprofit organizations, states, and/or units of general-purpose local governments (often counties), collectively known as recipients. In turn, recipients may contract or sub-grant with other organizations or government entities (known as Subrecipients) to carry out the grant's day-to-day program operations.
	The NOFA requires that each CoC design, operate and follow a collaborative process to develop and approve of applications for funding. The CoC has to establish priorities for funding projects in its geographic area and determine if the CoC will file one comprehensive application for funding or more than one.
	Funding acquired through the CoC Program NOFA can be used to support: permanent housing (PSH and RRH); Transitional Housing; Supportive Services Only (SSO) (including coordinated entry); HMIS (available to HMIS leads only); and homelessness prevention (limited).
Permanent Supportive Housing	Permanent Supportive Housing (PSH) provides long-term housing with intensive supportive services to persons with disabilities. These programs typically target people with extensive experiences of homelessness and multiple vulnerabilities and needs who would not be able to retain housing without significant support.
Prevention	Prevention is a strategy intended to target people who are at imminent risk of homelessness (whereas diversion usually targets people as they are initially trying to gain entry into shelter).
Rapid Rehousing	Rapid Rehousing (RRH) provides rental housing subsidies and tailored supportive services for up to 24-months, with the goal of helping people to transition during that time period to more permanent housing.



Point-in-Time (PIT) Count

Every year, the Norman/Cleveland County Continuum of Care (CoC) conducts a "Point in Time" (PIT) count of people experiencing homelessness on a single night in January. The January PIT count provides the best data available on the size and characteristics of the homeless population over time.

Roles Within a CoC

There are many roles that communities fill in order to ensure the CoC functions well and effectively serves people experiencing homelessness.

- CoC: Coalition of local government, nonprofits, and other stakeholders
- CoC Board: The entity established to act on behalf of the CoC. It must be representative of relevant organizations and projects serving homeless subpopulations in the community.
- Collaborative Applicant: A legal entity that is designated by the CoC to apply for annual NOFA funding on behalf of the CoC. The Collaborative Applicant also applies for planning funds on behalf of the CoC. Many CoCs delegate additional administrative tasks to the Collaborative Applicant.
- HMIS Lead: A legal entity designated by the CoC to manage the day-today operation of the CoC's Health Management Information System (HMIS).
- CoC Program Funding Recipients/Subrecipients ("programs" or "projects")
- Workgroups or Committees: HUD requires the CoC to establish workgroups and/or committees to help carry out other activities of the CoC.

Seriously Mentally III

A person is seriously mentally ill if they have a mental, behavioral, or emotional disorder that leads to functional impairments that prevent people from accomplishing one or more activities of daily living.

Single Room Occupancy (SROs)

Single Room Occupancy (SROs) are units that provide single, low-income homeless individuals with housing in privately owned, rehabilitated buildings. Typically, HUD contracts with local Public Housing Agencies to rehabilitate residential properties and then provide rental assistance payments to landlords who rent the space to people experiencing homelessness. The HUD rental assistance lasts up to ten years. Owners are compensated for the costs of rehabilitation and maintaining the property, through rental assistance payments. The rental assistance is project-based, so it stays with unit and does not travel with the individual in the event that they move.



Street Outreach	Street outreach involves multi-disciplinary teams who work in streets or encampments to engage with people experiencing homelessness who may be disconnected or alienated from services and supports that are offered at an agency.
Substance Use Disorder	Substance use disorder is a disease that affects a person's brain and behavior that leads to an inability of the person to control the use of medications or drugs.
Supportive Services	Supportive services include assistance applying for benefits, mental health and substance use services, outpatient health services, information and referral services, child care, education, life skills training, employment assistance and job training, housing search and counseling services, legal services, outreach services, transportation, food assistance, risk assessment and safety planning (particularly for individuals and families experiencing domestic violence), and case management services such as counseling, finding and coordinating services, and monitoring and evaluating progress in a program.
System Performance Measures (SPMs)	System Performance Measures (SPMs) are a selection of criteria that CoCs report regarding system level performance that are used to determine CoC funding. SPMs are used to measure performance and CoCs use them to adapt or modify practices to better meet the needs of people experiencing homelessness.
Transitional Housing (TH)	Transitional Housing (TH) provides temporary housing accommodations and supportive services. While many households benefit most from direct connections to permanent housing programs such as RRH or PSH (which are often more cost-effective over the long term), transitional housing can also be an effective support. In particular, certain subpopulations, such as people fleeing domestic violence and transitional age youth, can meaningfully benefit from a transitional housing environment.
Trauma-Informed Care	Trauma-informed care is a practice that focuses on understanding and compassion, especially in response to trauma. The practice utilizes tools that empower people to work toward stability. It recognizes a wide range of trauma that can impact people experiencing homelessness; physical, psychological, social, and emotional trauma. It emphasizes the safety of both clients and providers.



APPENDIX B: STAKEHOLDER ENGAGEMENT

The organizations interviewed for the Gaps Analysis were:

- Bridges of Norman
- Catholic Charities
- Central Oklahoma Community Mental Health
- The Chamber of Commerce
- The City of Norman
- First National Bank and Trust
- Food and Shelter
- The Homeless Alliance
- Hope Community Services
- The Norman Housing Authority
- The Norman Police Department
- Oklahoma Human Services Department
- The Pioneer Library System
- The Salvation Army
- The Social Injustice League
- Thunderbird Clubhouse
- Transition House
- The U.S. Veterans Administration
- The United Way

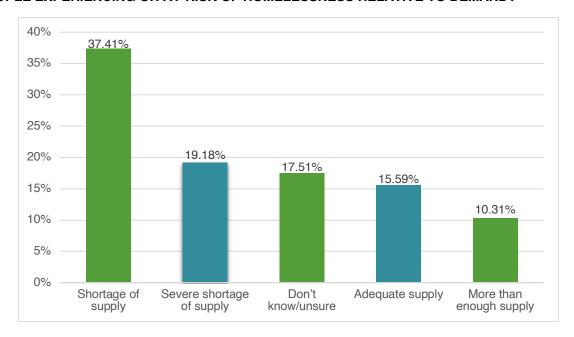
Focus groups included individuals and heads of households of families with lived experience or with recent lived experience of homelessness. The focus groups were held at the following locations:

- Food and Shelter
- The Sanctuary
- The Salvation Army
- Thunderbird Clubhouse

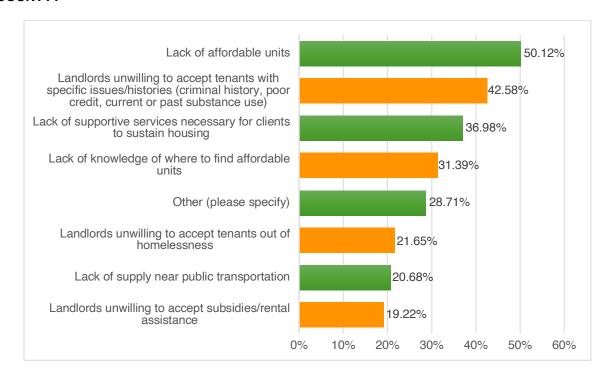


APPENDIX C: COMMUNITY SURVEY (EXCERPTS)

QUESTION 17. WHAT IS YOUR ASSESSMENT OF THE EXISTING SUPPLY OF HOUSING FOR PEOPLE EXPERIENCING OR AT-RISK OF HOMELESSNESS RELATIVE TO DEMAND?

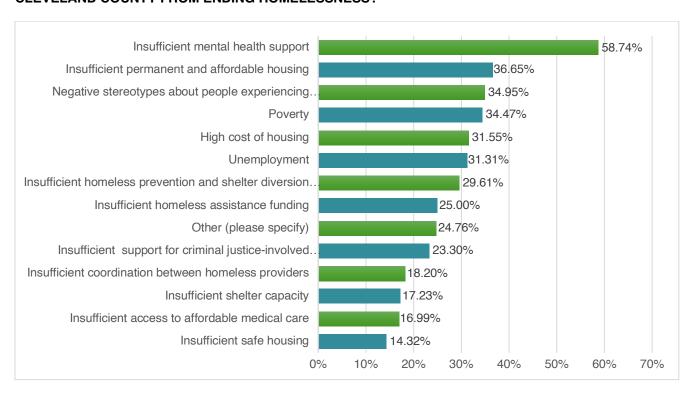


QUESTION 18. WHAT ARE THE GREATEST BARRIERS TO FINDING PERMANENT AND AFFORDABLE HOUSING FOR PEOPLE EXPERIENCING HOMELESSNESS IN CLEVELAND COUNTY?

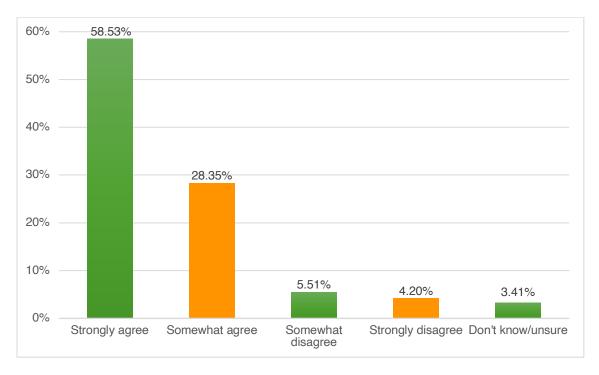




QUESTION 20. WHAT DO YOU THINK ARE THE BIGGEST ROADBLOCKS TO KEEPING CLEVELAND COUNTY FROM ENDING HOMELESSNESS?

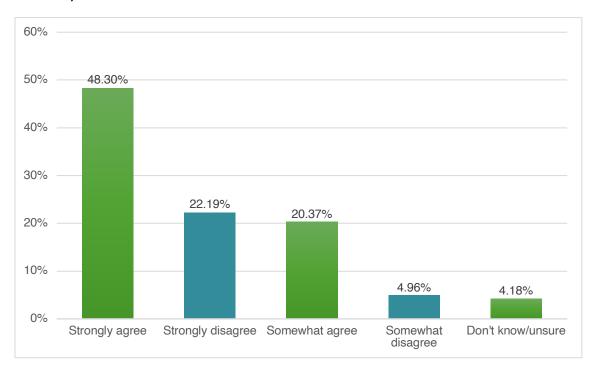


QUESTION 24: I BELIEVE IT IS POSSIBLE TO SIGNIFICANTLY REDUCE HOMELESSNESS IN CLEVELAND COUNTY.

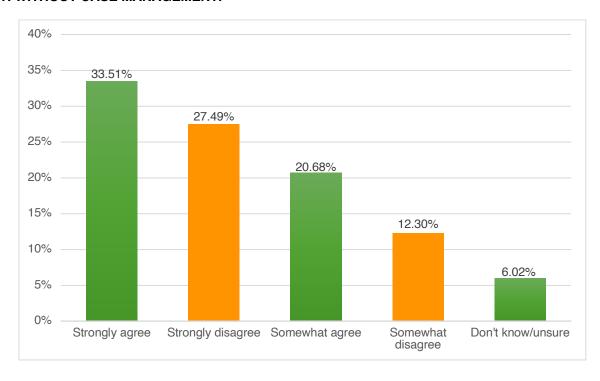




QUESTION 25: I WOULD SUPPORT FUNDING FOR NEW PERMANENT SUPPORTIVE HOUSING, (I.E. LONG-TERM HOUSING AND SUPPORTIVE SERVICES FOR PERSONS WITH DISABLING CONDITIONS)

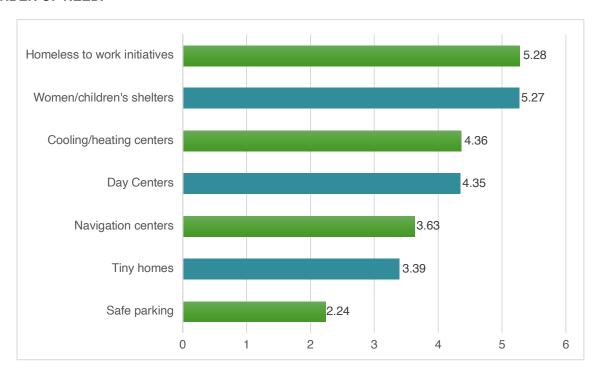


QUESTION 26: I WOULD SUPPORT FUNDING FOR NEW SHORT-TERM RENTAL ASSISTANCE WITH OR WITHOUT CASE MANAGEMENT.

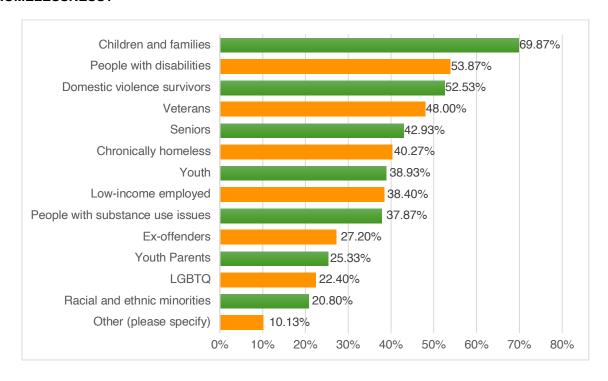




QUESTION 31: WHAT OTHER FACILITIES OR INITIATIVES WOULD MAKE THE BIGGEST IMPACT ON PEOPLE EXPERIENCING HOMELESSNESS IN CLEVELAND COUNTY? PLEASE RANK IN ORDER OF NEED.

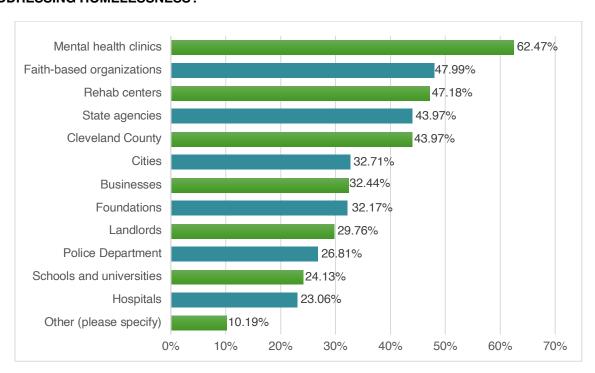


QUESTION 33: WHAT POPULATIONS NEED IMMEDIATE ATTENTION IN THE RESPONSE TO HOMELESSNESS?





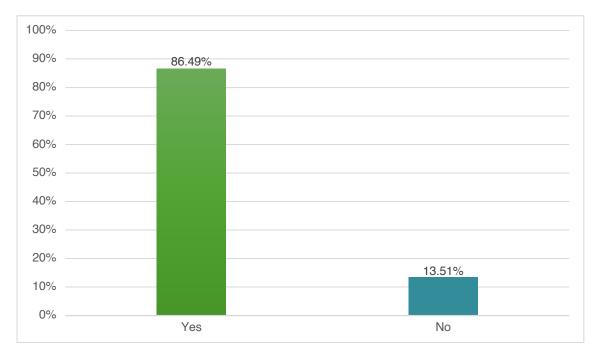
QUESTION 34: WHAT STAKEHOLDERS WOULD YOU LIKE TO SEE PLAY A BIGGER ROLE IN ADDRESSING HOMELESSNESS?



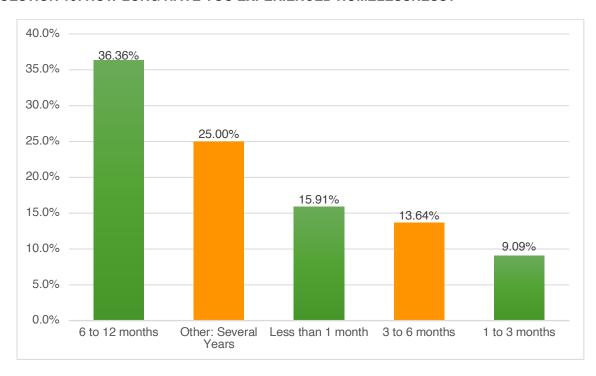


APPENDIX D: PEOPLE WITH LIVED EXPERIENCE OF HOMELESSNESS SURVEY

QUESTION 7: ARE YOU CURRENTLY HOMELESSNESS?

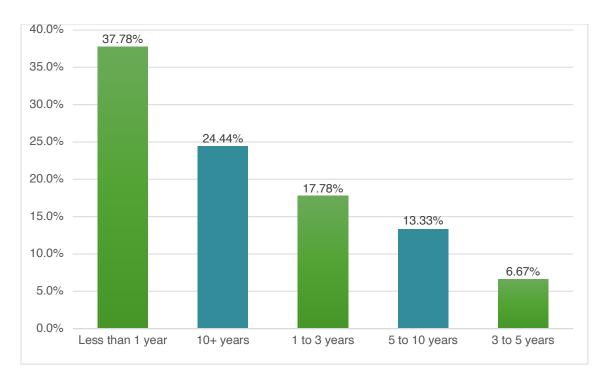


QUESTION 10: HOW LONG HAVE YOU EXPERIENCED HOMELESSNESS?

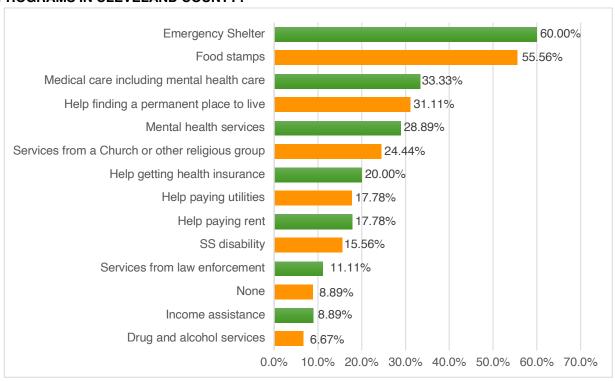


QUESTION 11: HOW LONG HAVE YOU LIVED IN CLEVELAND COUNTY?



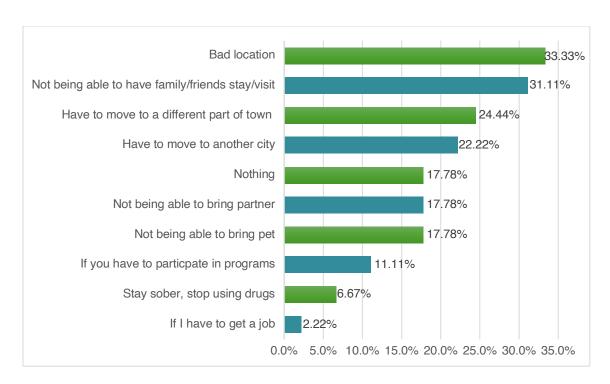


QUESTION 13: WHAT KIND OF HELP HAVE YOU GOTTEN FROM ORGANIZATIONS OR PROGRAMS IN CLEVELAND COUNTY?

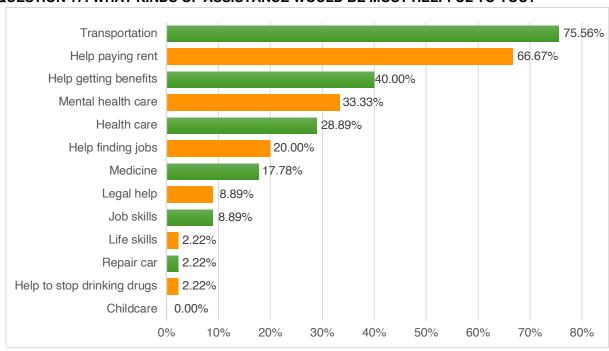


QUESTION 16: IF YOU WERE OFFERED HOUSING TODAY AND MONEY WER NOT A PROBLEM, WOULD ANY OF THESE KEEP YOU FROM ACCEPTING IT?





QUESTION 17: WHAT KINDS OF ASSISTANCE WOULD BE MOST HELPFUL TO YOU?







Norman/Cleveland County Continuum of Care (OK-504)

Bridging the Gap: Action Steps to End Homelessness

Prepared for the Norman/Cleveland County Continuum of Care - by Homebase

February 2022

ACTION PLAN

The following Action Plan was developed after conducting a robust Homelessness Gaps Analysis, distributing and collecting data from a community-wide feedback survey, and convening two community-wide meetings. The Action Plan is intended to provide a roadmap to guide current and future planning by the Norman/Cleveland County Continuum of Care (CoC OK-504) in its efforts to prevent and end homelessness.

GUIDING PRINCIPLES

The following guiding principles should lead the planning efforts in Cleveland County.

HOUSING FIRST

An effective response to homelessness requires additional housing opportunities, first and foremost, and any housing (whether permanent, temporary, or emergency) should embrace the evidence-based practice of Housing First.

The Housing First approach centers on providing people experiencing homelessness with housing as quickly as possible – and then providing services needed to maintain their housing. The premise of Housing First is that housing is a basic human right. The approach treats housing as a tool, rather than a reward, with supportive services offered as needed and on a voluntary basis. In addition to being a proven practice, a Housing First approach is consistent with what most people experiencing homelessness want.

INCLUDE EVERY VOICE

Communication and inclusive collaboration and coordination between and among the CoC, the Cities of Norman, Moore, and Noble, Cleveland County, and individual organizations and stakeholders – including both housed and homeless neighbors – is vital to success.

Working in silos is a natural result of individuals and organizations rising to the challenges faced by their neighbors and their communities. Limited resources, funding streams with varying administrative and reporting requirements, and different operating structures and leadership all contribute to the quilted landscape of housing and service providers in any community. Cleveland County is no exception.

No matter how compassionate and effective individual organizations and agencies are, when it comes to most efficiently using limited resources and best serving the most vulnerable members of any community, coordination is key. The more layered, well-informed, and comprehensive that coordination is, the greater a community's gains. Effective coordination is simply not possible without widespread, thoughtful communication and intentional, generous collaboration.

Collaboration and coordination is also required when it comes to resourcing the responses to homelessness. This plan assumes no one jurisdiction, provider, agency, or stakeholder group will be solely responsible for providing funding or other resources to implement the work. Rather, it is imperative that all stakeholders recognize the importance of investing in the

community's future, and also recognize that the investment will necessarily differ in both type and scope across jurisdictions, agencies, providers, systems, and other stakeholder groups.

PROMOTE A PERSON-CENTERED APPROACH

Promote a person-centered approach that is trauma-informed, empathetic and effective for those at risk of or experiencing homelessness. Creating a system that can provide customized responses to the immensely complicated circumstances that surround homelessness is administratively and financially challenging. But incorporating flexibility that allows for personcentered, individualized housing and services is vital to ensuring improved housing outcomes and overall well-being for individuals, families, and the community as a whole.

GOALS, STRATEGIES, AND ACTION STEPS

The community-wide process identified three overarching goals for the CoC:



Together the three **Goals** address the key challenges and needs identified in the CoC's Homelessness Gaps Analysis. Each goal includes a set of **Strategies** that enable the community to achieve the goal and **Action Steps** that are recommended to move the strategy forward.

In addition, the Action Plan identifies a series of short-term (6 months to 1 year), medium-term (2 to 3 years), and long-term (3 to 5 years) metrics associated with each goal. The metrics, while not exhaustive or prioritized, identify specific and quantifiable ways the community can measure whether and when the goals have been met.

Included in <u>Appendix A</u> is an <u>Implementation Plan</u>, which provides more detail and specificity for implementing the strategies, including prioritization of the action steps.

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GOAL ONE: SECURE A HOUSING FUTURE FOR ALL RESIDENTS

Cleveland County needs more affordable housing to effectively address homelessness. Access to affordable housing is vital to enable individuals who have become homeless to regain housing. It also provides an essential base for ongoing stability, which in turn prevents future homelessness. Recognizing this need, the City of Norman has budgeted funds for a comprehensive Housing Market Analysis and Affordability Strategy which will address some of these items.

Additionally, there are not enough permanent housing options and related supportive services currently available to meet the need in Cleveland County. Although there are disagreements on many issues, when the community-at-large was asked, more than two out of three respondents strongly or somewhat agreed that they support funding new permanent supportive housing (e.g., long-term housing with supportive services for people with disabling conditions). Additionally, many stakeholders expressed that the community needs to do more outreach to landlords and property owners to help voucher holders succeed, especially those with multiple barriers. The following section further details the actions and strategies to secure a housing future for all residents of Cleveland County.

Goal One addresses the following identified **key priority areas**:

- Develop Policies and Opportunities to Increase the Number of Safe and Affordable Housing Units Available in the Community
- Increase the Number of Landlords Willing to Rent to People with Lived Experience of Homelessness

STRATEGY 1.1: ASSESS AND USE AVAILABLE PUBLIC AND PRIVATE LAND FOR HOUSING

ACTION STEPS:

- 1.1.a: Conduct a Housing Market Analysis and Affordability Strategy for the County and the Cities of Moore and Noble.
- 1.1.b: Evaluate the feasibility and next steps for immediate development of rent-controlled apartment buildings, multi-family housing units, and in-law units, as well as nontraditional options such as repurposed motels/hotels and/or Accessory Dwelling Units (ADUs).
- 1.1.c. Establish a five-year Countywide Housing Development Pipeline that identifies an achievable path to establish new housing for unsheltered populations, people exiting mental and criminal institutions, and other underserved populations.
 - 1.1.c.i. Conduct an inventory of unused, underutilized, and available properties to determine what may be available for additional affordable housing units throughout Cleveland County.
 - 1.1.c.ii. Identify the most suitable sites for rehabilitation or development of affordable permanent housing in Cleveland County.
 - 1.1.c.iii. Initiate planning to aggressively expedite development and offer other incentives specifically for permanent supportive housing (PSH).

- 1.1.c.iv. Locate or create a development in Oklahoma green zones to provide independent housing for people involved in the criminal legal system.
- 1.1.d: Prioritize the development of single-room occupancy (SROs) buildings, which provide non-congregate, small furnished single rooms within multi-tenant buildings for residents with low- or minimal income who may be transitioning out of long-term homelessness.

STRATEGY 1.2: PROTECT AND EXPAND AFFORDABLE HOUSING THROUGH LOCAL POLICY

ACTION STEPS:

- 1.2.a: Adopt policies by municipalities and the County that require set asides for *all* new development, dedicating a certain proportion or number of units within each new development for very low-income (VLI) and extremely low-income (ELI) households.
- 1.2.b: Revise City and/or County policies to expand and streamline, by-right, a wide variety of resources, services, and housing for people experiencing homelessness.
- 1.2.c. Develop "Moving On" policies within the Norman Housing Authority (NHA) that prioritize Housing Choice Vouchers for people in permanent supportive housing (PSH) to provide an affordable housing option and short-term services and resources that support program participants during and shortly after their move to a greater level of independence.
- 1.2.d. Create local policies that incentivize absent landlords to sell or develop properties (e.g., residential vacancy tax or other similar efforts, including county-level approaches).

STRATEGY 1.3: DEVELOP GREATER ACCESS TO AFFORDABLE HOUSING THROUGH A COORDINATED LANDLORD ENGAGEMENT CAMPAIGN

ACTION STEPS:

- 1.3.a: Establish a county-wide landlord engagement strategy that includes year-round staffing support to educate the general public, recruit landlords, engage in outreach to property managers, and develop materials to explain the advantages for landlords to work with the CoC and local housing programs. Develop specific strategies to connect with landlords who may not live in the city or county.
- 1.3.b: Address barriers that make it difficult for tenants to obtain affordable housing by creating client portfolios that include letters of support from community members who know the client or by adding information about the client's background and the steps they have taken to improve their housing stability. Provide people help with criminal record expungement, credit repair, and eviction expungement, if needed. Provide opportunities for potential tenants to meet landlords one-on-one to create personal connections.
- 1.3.c: Establish a landlord risk mitigation fund that provides compensation to landlords to mitigate any damage caused by tenants. Develop a formalized protocol that creates standards for responding to landlords seeking mitigation assistance.
- 1.3.d: Create financial incentives for landlords renting to voucher holders, including bonuses for new and/or returning landlords.

STRATEGY 1.4: EXPAND HOUSING THROUGH THE COORDINATED ASSISTANCE PROGRAM

ACTION STEPS:

- 1.4.a: Expand the highly successful coordinated efforts to assist people experiencing homelessness to obtain identification documents and connect them to public benefits by holding community events more frequently than once per quarter. Also establish effective communication and coordination efforts between agencies to strengthen connections and streamline access to documents and benefits.
 - 1.4.a.i. Strengthen access to resources to support households with criminal and eviction expungement, credit assistance, and document readiness to ensure they can use available housing subsidies.
- 1.4.b: Create a countywide housing navigator program tasked with meeting in-person with individuals and families experiencing homelessness. Provide trauma-informed care and motivation interviewing training to all housing navigators.
- 1.4.c: Expand rental assistance programs to cover application fees and assistance with security deposits and move-in costs to help ensure vouchers are utilized equitably.
 - 1.4.c.i: Increase the availability and amount of flexible funds that support homeless and at-risk households through both one-time and short-term, recurring financial assistance to solve acute housing crises and emergencies
- 1.4.d. Develop a shared housing program that can increase the housing available to single adults through 2- and 3-bedroom homes for individuals exiting homelessness by coordinating across programs.
- 1.4.e. Expand intensive case management supports for formerly homeless individuals with high needs who are already housed.

GOAL ONE METRICS: Secure Housing Future for Norman/Cleveland County Residents

Short-Term	Medium-Term	Longer-Term
6 months to 1 year	1 to 3 years	3 to 5 years
Metric 1.1: Public Housing Authorities operating in Cleveland County has implemented a Moving On preference for Housing Choice Vouchers for people in permanent supportive housing no later than January 2023. Metric 1.2: Community-wide coordinated efforts to help people become document ready and apply for mainstream benefits are held at least every other month by	Metric 1.3: A landlord mitigation fund and/or a landlord incentive program is developed, funded, and providing resources to local landlords by December 2023. Metric 1.4: A robust housing navigator program is up and running by January 2023. Metric 1.5: Policies enabling Single Room Occupancy units have been proposed and passed and at least one building	Metric 1.6: 120 new PSH units with services are purchased, built, and/or rehabilitated and ready for occupancy no later than December 2026.

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the end of January 2022 (unless COVID prohibits implementation).

supporting SROs is in place by December 2024.

GOAL TWO: INCREASE ACCESS TO HOMELESS EMERGENCY RESPONSE SERVICES

With no permanent full-service daytime drop-in centers and reportedly only one completely low-barrier overnight shelter – and relatively few shelter beds of any kind – Cleveland County has a relatively large population of people who live outside full-time. Housing-focused crisis shelters (often known as "emergency shelters") are an important part of a community's response to homelessness. While they help people stay safe from the dangers of living outside, they are also a valuable link to permanent housing, especially for people who have been homeless for an extended period of time and might be reluctant to engage in services. Additionally, investments in outreach, substance use and mental disorder services, housing and related services are needed in the community and addressed in the next section.

Goal Two addresses the following identified **key priority areas**:

- Increase Low-Barrier, Housing-Focused Shelter
- Expand Supportive Services Necessary for People to Sustain Stable Housing
- Improve Transportation to Employment, Services and Shelter

STRATEGY 2.1: INCREASE LOW-BARRIER, HOUSING-FOCUSED SHELTER

ACTION STEPS:

- 2.1.a: Establish at least one permanent year-round, lowbarrier housing-focused shelter with day and night services.
- 2.1.b: Provide additional support to participants who exit shelters to permanent housing through proactive case management and best practice strategies, such as motivational interviewing, trauma-informed care, and housing-focused case management and planning.
- 2.1.c: Provide optional wrap-around services and connections to key resources at all overnight and day shelters.
- 2.1.d: Reduce existing barriers to entry in already existing shelters and other housing programs whenever possible.
 - 2.1.d.i: Enact admission policies for all shelters that screen-in rather than screen-out potential participants who face the greatest barriers to housing.
 - 2.1.d.ii: Enact minimal rules and restrictions that focus on behavioral expectations to help ensure client and staff safety few rules, not "no rules."

Shelter is defined as temporary or interim places for people to stay, which include year-round emergency shelters, winter and warming shelters, navigation centers, and transitional housing. These types of shelter have varying lengths of stay, food options, and support services.

- 2.1.d.iii: Provide accommodations that welcome partners, pets, and possessions so that people do not face a choice of housing or separation.
- 2.1.d.iv: Establish flexible access to shelter and services, including extended hours of operation, arrangements for late arrivals, non-restricted mealtimes, and lenient curfew policies.

Low-barrier programs have few preconditions for admission. They don't require people to be sober, have identification, proof of income, etc., They limit the barriers to entry by allowing some flexibility (e.g., partners and pets are allowed, they can store personal belongings, and there is a flexibility of hours whenever possible).

Housing First is a well-accepted, national, evidenced-based best practice that eliminates barriers to housing, ensuring individuals and families can exit homelessness as quickly as possible.

STRATEGY 2.2: EXPAND STREET AND ENCAMPMENT OUTREACH INCLUDING TREATMENT FOR MENTAL HEALTH AND SUBSTANCE USE DISORDERS

ACTION STEPS:

- 2.2.a: Create a coordinated, county-wide street and encampment outreach team that includes staff from a mix of different disciplines, including street medicine, social work, nursing, behavioral health, and housing navigation.
- 2.2.b. Purchase and equip a mobile outreach van program that can offer medical, behavioral health, and housing navigation services.
- 2.2.c: Expand capacity and support of existing outreach teams.
 - 2.2.c.i: Ensure existing outreach teams offer access to housing-focused case management, public benefits, and other critical housing-focused resources.
 - 2.2.c.ii: Ensure street outreach staff are engaged with and participating in Coordinated Entry (CE) and use the Homeless Management Information System (HMIS).
- 2.2.d: Develop a peer support program as part of an interdisciplinary approach that trains and uses peers with lived experience of homelessness for street outreach and system navigation.

STRATEGY 2.3: EXPAND SUPPORTIVE SERVICES AND HOUSING-FOCUSED CASE MANAGEMENT

ACTION STEPS:

- 2.3.a: Provide ongoing training and educational opportunities to all community partners and their staff (current and new) on housing-focused approaches and best practices to connect people to housing and services.
- 2.3.b Ensure staff trained on housing-focused approaches and housing navigation are available night and day at crisis shelters, health centers, and day centers.
- 2.3.c. Strengthen partnerships and coordination with mainstream agencies such as legal aid, credit repair services, public benefits advocacy and appeals (Medicaid, SNAP, TANF, SSI/SSDI), workforce development, etc.

2.3.d: Evaluate and revise salaries and benefits for case managers to ensure that the CoC can recruit and retain qualified staff.

STRATEGY 2.4: IMPROVE TRANSPORTATION TO EMPLOYMENT, SERVICES, AND SHELTER

ACTION STEPS:

- 2.4.a: Develop a comprehensive transportation strategy in partnership with local transit authorities that considers the transportation needs of people experiencing homelessness.
 - 2.4.a.i. Provide visible, easily accessible information about transit schedules that does not require a smart phone or access to the internet.
 - 2.4.a.ii Create a program/expand existing programs that provide(s) discounted or free transit passes to people experiencing homelessness.
 - 2.4.a.iii. Set up and identify locations where personal belongings may be stored and where pets and service animals may be cared for while individuals access services and resources.
- 2.4.b: Work with health care providers to enable transportation to and from medical appointments.
- 2.4.c: Develop a subsidized ridesharing program or creating a van service for individuals experiencing homelessness/recently housed.

GOAL TWO METRICS: Increase Access to Homeless Emergency Response Services

Short-Term	Medium-Term	Longer-Term
6 months to 1 year	1 to 3 years	3 to 5 years
Metric 2.1: A series of trainings on housing-focused services has been designed and offered to staff from all CoC partners and is in place for biannual trainings for current staff and more frequent training for new staff no later than December 2022. Metric 2.2: A peer support group of people with lived experience of homelessness is created, funded, trained, and providing support to people experiencing homelessness by December 2022. Metric 2.3: Ensure 90% participation in the countywide HMIS, from the city, county, and nonprofit providers who	Metric 2.4: A mobile van for street outreach has been funded/purchased, staffed, and on the streets by no later than June 2023. Metric 2.5: At least one year-round low-barrier, housing-focused shelter is providing shelter and services no later than June 2023.	Metric 2.6: The 2025 PIT count shows 30% fewer unsheltered individuals in Cleveland County compared to the 2019 PIT count.

primarily serve individuals	
experiencing homelessness by	
December 2022.	

GOAL THREE: MOBILIZE THE COUNTYWIDE RESPONSE TO PREVENT AND END HOMELESSNESS

Improving the homelessness system response includes efforts in prevention, coordination with other sectors, people with lived experience of homelessness and ensuring decision makers have the data to make informed decisions. Cleveland County can help individuals and families avoid the economic, social, mental, and physical challenges that result from homelessness – often at a much lower cost than it takes to serve people after they lose their housing. Prevention involves adequate cross-sector collaboration, including with schools, the child welfare system, public health/emergency rooms, mental health care facilities, public benefit programs, etc. It also includes increased awareness and attentiveness to housing stability as well as effective transition and/or discharge planning. Additionally, ensuring coordination and communication within the CoC and between the CoC and the broader community In Cleveland County will improve the homeless system response.

Goal Three addresses the following identified key priority areas:

- Expand Coordinated Prevention Assistance
- Improve Communication, Coordination, and Transparency
- Commit to Robust Data Collection and Analysis

STRATEGY 3.1: EXPAND COORDINATED PREVENTION AND DIVERSION ASSISTANCE

ACTION STEPS:

- 3.1.a: Establish a coordinated homelessness prevention and problem-solving (homelessness diversion) system to help people at high risk of homelessness remain housed.
 - 3.1.a.i: Provide regular training for all stakeholder partners in problem-solving techniques, motivational interviewing, and include staff from all access and outreach points in training opportunities.
 - 3.1.a.ii: Identify a cohort of staff who focus on problem-solving with people before they enter the homeless system of care.
 - 3.1.1.iii: Leverage prevention and diversion programs to allow the system to reserve limited beds in shelter and housing programs for those that need additional support to regain housing.
- 3.1.b: Review current rental assistance programs' eligibility and protocols and revise policies to ensure that all households eligible for rental assistance receive help.

3.1.c: Establish a monitoring protocol, including a field in HMIS to identify households who fall into homelessness for the first time, and to track impact of interventions.

Flexible funds have increasingly been permitted and encouraged as an allowable expense by federal, state, and County funders. Flexible funds can be used for different purposes. They can pay for costs that will result in an immediate solution of a housing crisis. They can bridge the gap while permanent housing is secured. They can cover household needs that will help people keep in their housing. (Diversion is a strategy that prevents homelessness for people seeking shelter by helping them identify immediate alternate housing arrangements and, if necessary, connecting them with services and financial assistance to help them return to permanent housing.

Prevention is a strategy intended to target people who are at imminent risk of homelessness (whereas diversion usually targets people as they are initially trying to enter shelter)

STRATEGY 3.2: PROVIDE INFORMATION AND ENGAGEMENT OPPORTUNITIES TO PEOPLE WITH LIVED EXPERIENCE OF **HOMELESSNESS**

ACTION STEPS:

- 3.2.a: Establish a lived experience advisory board, comprised of people currently experiencing homelessness or with recent lived experience who can provide feedback to the CoC and be involved in policymaking and allocations processes within the CoC.
- 3.2.b: Develop resource materials and educational information that can be available online and distributed at the public library, at transportation sites, and other places where people experiencing homelessness or at risk of homelessness can learn more about the variety of organizations and services in the community, including the name, location, and hours of operation for shelters, day services, food, etc.

STRATEGY 3.3: DEVELOP A PUBLIC EDUCATION ABOUT THE HOMELESS SYSTEM OF CARE

- 3.3.a: Undertake a community-wide engagement campaign that includes landlords, people recently housed, the business community, and other leaders to dispel common myths about homelessness and celebrate progress of the community's efforts to reduce and end homelessness.
 - 3.3.a.i: Outreach and involve philanthropy, service organizations, and the faith-based community in supporting engagement campaigns.
- 3.3.b: Include introductory information about homelessness when collecting community feedback, hosting townhalls, holding hearings, or having large meetings related to homelessness.

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STRATEGY 3.4: IMPROVE COMMUNICATION, COORDINATION, AND TRANSPARENCY OF THE CoC

- 3.4.a: Create a new and accessible standalone CoC website that is separate from the City of Norman's website, which provides information regarding success stories, challenges, key policy decisions, funding allocations, announcements of new staff, available resources, housing opportunities, etc.
 - 3.4.a.i: Create a publicly facing dashboard that shows progress towards identified goals (i.e., services offered, people assisted, or people placed into housing).
 - 3.4.a.ii: Prominently display a link to the CoC website on the Cities of Norman and Moore websites, at the public library, on the Cleveland County website, on all stakeholder partner websites, and other public places frequently visited by individuals experiencing homelessness. Provide mobile friendly and printed materials with QR codes on all documents.
- 3.4.b: Create additional formal mechanisms to provide transparent information about the CoC to the broader community and require agencies to contribute timely and relevant information to the efforts.
- 3.4.c: Provide additional opportunities for facilitated conversations with the staff of the Cities of Norman, Moore, Cleveland County and CoC leadership, and members of the community as they seek to work together in an actionable way to implement the Action Plan.

STRATEGY 3.5: COMMIT TO ROBUST DATA COLLECTION

ACTION STEPS:

- 3.5.a: Revise data quality standards and develop a more robust, clear, and transparent CoC "Data Quality Plan" that establishes expectations for both the community and endusers.
 - 3.5.a.i: Develop data quality benchmarks. The Data Committee should incorporate into the CoC's own detailed manual baseline benchmarks and provide regular updates to each HMIS-participating agency.
 - 3.5.a.ii: Once the Data Quality Plan has been drafted and adopted with benchmarks and timelines, the CoC should implement appropriate incentives and establish a monitoring structure.
 - 3.5.a.iii: Review data entry and data quality requirements for HMIS- participating homeless service providers to improve local understanding of the scope of chronic homelessness in Cleveland County.
- 3.5.b: Revitalize the CoC's Data Committee with a clear mandate and expectations; including to monitor Homeless Management Information System (HMIS) data quality, expand HMIS bed coverage, oversee ISOK's regular efforts, review and revise HMIS Policies and Procedures as necessary, etc.
 - 3.5.b.i: Produce aggregate data reports, at least quarterly, which can provide public information about the numbers of people being served by the homeless system of care and/or placed in stable housing.
 - 3.5.b.ii: Review data entry and data quality requirements for the HMIS-participating homeless service providers to improve local understanding of the scope of chronic homelessness in Cleveland County.

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- 3.5.c: Reevaluate Point-in-Time (PIT) count methodology, especially with respect to the chronic homeless status of residents in emergency shelters and unsheltered situations.
- 3.5.d: Evaluate, track, and implement training and program modifications to address any disparities in system access and service provision for special subpopulations.
- 3.5.e: Establish a monitoring protocol, including a field in HMIS to identify households who fall into homelessness for the first time or who return to homelessness, and to track impact of interventions.
- 3.5.f: Seek out additional resources for HMIS to subsidize license costs and consider a program to sponsor agencies based on need to make HMIS participation more financially accessible to a diverse range of stakeholders. Consider requiring organizations that want to place their clients in housing to participate in HMIS if a subsidy is available.

GOAL THREE METRICS: Mobilize the Citywide Response to Prevent and End Homelessness

Short-Term	Medium-Term	Longer-Term
6 moths to 1 year	1 to 3 years	3 to 5 years
Metric 3.1: The CoC will have a stand-alone webpage no later than June 2022. Metric 3.2: The CoC will launch its first outreach initiative that provides information and resources to people at risk or experiencing homelessness by December 2022. Metric 3.3: The CoC's Data Committee has been reconvened and has made public at least one aggregate report by June 2022.	Metric 3.4: Launch a robust homelessness diversion effort no later than September 2023. Metric 3.5: A new Data Quality plan is approved and in place, with training and education available by December 2022. Metric 3.6: All agencies working with the CoC are fully participating in HMIS, including those that need subsidization, no later than March 2023.	

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APPENDIX A: IMPLEMENTATION PLAN

Goal 1: Secure a Housing Future for All Norman Residents

Activity	Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
Strategy 1.1:	Short-Term			
Assess and use available public and private land	1.1.a: Conduct a Housing Market Analysis and Affordability Strategy for the County and the Cities of Moore and Noble.			
for housing	1.1.b: Evaluate the feasibility and next steps for immediate development of rent-controlled apartment buildings, multi-family housing units, and in- law units, as well as non-traditional options such as repurposed motels/hotels and/or Accessory Dwelling Units (ADUs).			
	Medium-Term			
	1.1.d: Prioritize the development of single-room occupancy (SROs) buildings, which provide non-congregate, small furnished single rooms within multi-tenant buildings for residents with low- or minimal income who may be transitioning out of long-term homelessness.			
	Long-Term			
	1.1.c: Establish a five-year Countywide Housing Development Pipeline that identifies an achievable path to establish new housing for unsheltered populations, people exiting mental and criminal institutions, and other underserved populations.			
	1.1.c.i: Conduct an inventory of unused, underutilized, and available properties to determine what may be available for additional affordable housing units throughout both the City of Norman and Cleveland County.			
	1.1.c.ii: Identify the most suitable sites for rehabilitation or development of affordable permanent housing in both the City of Norman and in Cleveland County.			
	 1.1.c.iii: Initiate planning to aggressively expedite development and offer other incentives specifically for permanent supportive housing (PSH). 			

1.1.c.iv: Locate or create a development in Oklahoma green zones to provide independent housing for people with criminal convictions.		

Activity	Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
Strategy 1.2: Protect and expand affordable housing through local policy	Short-Term 1.2.c: Develop "Moving On" policies within the Norman Housing Authority (NHA) that prioritize Housing Choice Vouchers for people in permanent supportive housing (PSH) in order to provide an affordable housing option and short-term services and resources that support program participants during and shortly after their move to a greater level of independence.			
	Medium-Term 1.2.a: Adopt policies at the municipal and county levels that require set asides for <i>all</i> new development, dedicating a certain proportion or number of units within each new development for very low-income			
	 (VLI) and extremely low-income (ELI) households. 1.2.b: Revise City and/or County policies to expand and streamline, by-right, a wide variety of resources, services, and housing for people experiencing homelessness. 			
	1.2.d: Create local policies that incentivize absent landlords to sell or develop properties (e.g., residential vacancy tax or other similar efforts, including county-level approaches).			

Activity	Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
Strategy 1.3: Develop Greater Access to Affordable Housing Through a Coordinated Landlord Engagement Campaign	 Short-Term 1.3.a: Establish a county-wide landlord engagement strategy that includes year-round staffing support to educate the general public, recruit landlords, engage in outreach to property managers, and develop materials to explain the advantages for landlords to work with the CoC and local housing programs. Develop specific strategies to connect with landlords who may not live in the city or county. 1.3.b: Address barriers that make it difficult for tenants to obtain affordable housing by creating client portfolios that include letters of support from community members who know the client or by adding information about the client's background and the steps they have taken to improve their housing stability. Provide people help with criminal record expungement, credit repair, and eviction expungement, if needed. Provide opportunities for potential tenants to meet landlords one-on-one to create personal connections. Long-Term 1.3.c: Establish a landlord risk mitigation fund that provides compensation to landlords to mitigate any damage caused by tenants. Develop a formalized protocol that creates standards for responding to landlords seeking mitigation assistance. 1.3.d: Create financial incentives for landlords renting to voucher holders, including bonuses for new and/or returning landlords. 			

Activity	Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
Strategy 1.4: Expand Housing Through the Coordinated Assistance Program	 Short-Term 1.4.a: Expand the highly successful coordinated efforts to assist people experiencing homelessness to obtain identification documents and connect them to public benefits by holding community events more frequently than once per quarter. 1.4.a.i: Strengthen access to resources to support households with criminal and eviction expungement, credit assistance, and document readiness to ensure they can use available housing subsidies. 1.4.c: Expand rental assistance programs to cover application fees and assistance with security deposits and move-in costs to help ensure vouchers are utilized equitably. 1.4.c.i: Increase the availability and amount of flexible funds that support homeless and at-risk households through both one-time and short-term, recurring financial assistance to solve acute housing crises and emergencies 1.4.e: Expand intensive case management supports for formerly homeless individuals with high needs who are already housed. Long-Term 1.4.b: Create a countywide housing navigator program tasked with meeting in-person with individuals and families experiencing homelessness. Provide trauma-informed care and motivation interviewing training to all housing navigators. 1.4.d: Develop a shared housing program that can increase the housing available to single adults through 2- and 3-bedroom homes for individuals exiting homelessness by coordinating across programs. 			

Goal 2: Increase Access to Homeless Emergency Response Services

Activity	Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
Strategy 2.1: Increase Low- Barrier, Housing- Focused Shelter	Short-Term 2.1.b: Provide additional support to participants who exit shelters to permanent housing through proactive case management and best practice strategies, such as motivational interviewing, trauma-informed care, and housing-focused case management and planning.			
	2.1.c: Provide optional wrap-around services and connections to key resources at all overnight and day shelters.			
	2.1.d: Reduce existing barriers to entry in already existing shelters and other housing programs whenever possible.			
	2.1.d.i: Enact admission policies for all shelters that screen-in rather than screen-out potential participants who face the greatest barriers to housing.			
	2.1.d.ii: Enact minimal rules and restrictions that focus on behavioral expectations to help ensure client and staff safety – few rules, not "no rules."			
	 2.1.d.iii: Provide accommodations that welcome partners, pets, and possessions so that people do not face a choice of housing or separation. 			
	Medium-Term			
	2.1.a: Establish at least one permanent year-round, low-barrier housing- focused shelter with day and night services.			

Activity	Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
Strategy 2.2: Expand Street and Encampment Outreach Including Treatment for Mental Health and Substance Use Disorders	2.2.c: Expand capacity and support of existing outreach teams.			

Activity	Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
Strategy 2.3: Expand Supportive Services and Housing-Focused Case Management	 Short-Term 2.3.a: Provider ongoing training and education opportunities to all community partners and their staff (current and new) on housing-focused approaches and best practices to connect people to housing and services. Medium-Term 2.3.b: Ensure staff trained on housing-focused approaches and housing navigation are available night and day at crisis shelters, health centers, and day centers. 2.3.c: Strengthen partnerships and coordination with mainstream agencies such as legal aid, credit repair services, public benefits advocacy and appeals (Medicaid, SNAP, TANF, SSI/SSDI), workforce development, etc. 2.3.d: Evaluate and revise salaries and benefits for case managers to ensure that the CoC can recruit and retain qualified staff. 			

Activity	Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
Strategy 2.4: Improve Transportation To Employment, Services, And Shelter	 Short-Term 2.4.b: Work with health care providers to enable transportation to and from medical appointments. Medium-Term 2.4.a: Develop a comprehensive transportation strategy in partnership with local transit authorities that considers the transportation needs of people experiencing homelessness. 2.4.a.i: Provide visible, easily accessible information about transit schedules that does not require a smart phone or access to the internet. 2.4.a.ii: Create a program/expand existing programs that provide(s) discounted or free transit passes to people experiencing homelessness. 2.4.a.iii: Set up and identify locations where personal belongings may be stored and where pets and service animals may be cared for while individuals access services and resources. 2.4.c: Develop a subsidized ridesharing program or creating a van service for individuals experiencing homelessness/recently housed. 			

Goal 3: Mobilize The Citywide Response To Prevent And End Homelessness

Activity	Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
Strategy 3.1: Expand	Short-Term 3.1.b: Review current rental assistance programs' eligibility and protocols			
Coordinated Prevention and	and revise policies to ensure that all households eligible for rental assistance receive help.			
Diversion Assistance	3.1.c: Establish a monitoring protocol, including a field in HMIS to identify households who fall into homelessness for the first time, and to track impact of interventions.			
	Medium-Term			
	3.1.a: Establish a coordinated homelessness prevention and problem- solving (homelessness diversion) system to help people at high risk of homelessness remain housed.			
	3.1.a.i: Provide regular training for all stakeholder partners in problem-solving techniques, motivational interviewing, and include staff from all access and outreach points in training opportunities.			
	3.1.a.ii: Identify a cohort of staff who focus on problem-solving with people before they enter the homeless system of care.			
	3.1.1.iii: Leverage prevention and diversion programs to allow the system to reserve limited beds in shelter and housing programs for those that need additional support to regain housing.			

Activity	Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
Strategy 3.2: Provide Information and Engagement Opportunities to People with Lived Experience of Homelessness	Short-Term 3.2.b: Develop resource materials and educational information that can be available online and distributed at the public library, at transportation sites, and other places where people experiencing homelessness or at risk of homelessness can learn more about the variety of organizations and services in the community, including the name, location, and hours of operation for shelters, day services, food, etc. Medium-Term 3.2.a: Establish a lived experience advisory board, comprised of people			
	currently experiencing homelessness or with recent lived experience who can provide feedback to the CoC and be involved in policymaking and allocations processes within the CoC.			

Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
Short-Term			
3.3.a: Undertake a community-wide engagement campaign that includes landlords, people recently housed, the business community, and other leaders to dispel common myths about homelessness and celebrate progress of the community's efforts to reduce and end homelessness.			
3.3.a.i: Outreach and involve philanthropy, service organizations, and the faith-based community in supporting engagement campaigns.			
3.3.b: Include introductory information about homelessness when collecting community feedback, hosting townhalls, holding hearings, or having large meetings related to homelessness.			
	 (\$ → \$\$\$ scale indicates initial cost from low to high) Short-Term 3.3.a: Undertake a community-wide engagement campaign that includes landlords, people recently housed, the business community, and other leaders to dispel common myths about homelessness and celebrate progress of the community's efforts to reduce and end homelessness. 3.3.a.i: Outreach and involve philanthropy, service organizations, and the faith-based community in supporting engagement campaigns. 3.3.b: Include introductory information about homelessness when collecting community feedback, hosting townhalls, holding hearings, 	 (\$ → \$\$\$ scale indicates initial cost from low to high) Short-Term 3.3.a: Undertake a community-wide engagement campaign that includes landlords, people recently housed, the business community, and other leaders to dispel common myths about homelessness and celebrate progress of the community's efforts to reduce and end homelessness. 3.3.a.i: Outreach and involve philanthropy, service organizations, and the faith-based community in supporting engagement campaigns. 3.3.b: Include introductory information about homelessness when collecting community feedback, hosting townhalls, holding hearings, 	(\$ → \$\$\$\$ scale indicates initial cost from low to high) Short-Term 3.3.a: Undertake a community-wide engagement campaign that includes landlords, people recently housed, the business community, and other leaders to dispel common myths about homelessness and celebrate progress of the community's efforts to reduce and end homelessness. 3.3.a.i: Outreach and involve philanthropy, service organizations, and the faith-based community in supporting engagement campaigns. 3.3.b: Include introductory information about homelessness when collecting community feedback, hosting townhalls, holding hearings,

Activity	Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
Strategy 3.4: Improve Communication, Coordination, and transparency of the CoC	Short-Term 3.4.a: Create a new and accessible CoC website that is separate from the City of Norman's website, which provides information regarding success stories, challenges, key policy decisions, funding allocations, announcements of new staff, available resources, housing opportunities, and etc.			
	3.4.a.i: Create a publicly facing dashboard that shows progress towards identified goals (i.e., services offered, people assisted, or people placed into housing).			
	3.4.a.ii: Prominently display a link to the CoC website on the City of Norman website, at the public library, on the Cleveland County website, on all stakeholder partner websites, and other public places frequently visited by individuals experiencing homelessness.			
	3.4.c: Provide additional opportunities for facilitated conversations with the staff of the City of Norman, CoC leadership, and members of the community as they seek to work together in an actionable way to implement the Action Plan.			
	Medium-Term			
	3.4.b: Create additional formal mechanisms to provide transparent information about the CoC to the broader community and require agencies to contribute timely and relevant information to the efforts.			

Activity	Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
Strategy 3.5: Commit to Robust Data Collection	Short-Term 3.5.b: Revitalize the CoC's Data Committee with a clear mandate and expectations; including to monitor Homeless Management Information System (HMIS) data quality, expand HMIS bed coverage, oversee ISOK's regular efforts, review and revise HMIS Policies and Procedures as necessary, etc.			
	3.5.b.i: Produce aggregate data reports, at least quarterly, which can provide public information about the numbers of people being served by the homeless system of care and/or placed in stable housing.			
	3.5.b.ii: Review data entry and data quality requirements for the Homeless Management Information System (HMIS) participating homeless service providers to improve local understanding of the scope of chronic homelessness in Cleveland County.			
	3.5.c: Reevaluate Point-in-Time (PIT) count methodology, especially with respect to the chronic homeless status of residents in emergency shelters and unsheltered situations.			
	3.5.e: Establish a monitoring protocol, including a field in HMIS to identify households who fall into homelessness for the first time or who return to homelessness, and to track impact of interventions.			
	Medium-Term			
	3.5.a: Revise data quality standards and develop a more robust, clear, and transparent CoC "Data Quality Plan" that establishes expectations for both the community and end-users.			
	3.5.a.i: Develop data quality benchmarks. The Data Committee should incorporate into the CoC's own detailed manual baseline benchmarks and provide regular updates to each HMIS- participating agency.			
	3.5.a.ii: Once the Data Quality Plan has been drafted and adopted with benchmarks and timelines, the CoC should implement appropriate incentives and establish a monitoring structure.			

Activity	Steps (\$ → \$\$\$ scale indicates initial cost from low to high)	Responsible Parties	Stakeholders	Funding Source
	3.5.a.iii: Review data entry and data quality requirements for HMIS- participating homeless service providers to improve local understanding of the scope of chronic homelessness in Cleveland County.			
	3.5.d: Evaluate, track, and implement training and program modifications to address any disparities in system access and service provision for special subpopulations.			
	3.5.f: Seek out additional resources for HMIS to subsidize license costs and consider a program to sponsor agencies based on need to make HMIS participation more financially accessible to a diverse range of stakeholders. Consider requiring organizations that want to place their clients in housing to participate in HMIS if a subsidy is available.			

Population: Sheltered and Unsheltered Count

Persons in Households with at least one Adult and one Child

	Sheltered	
	Emergency	Transitional
Total Number of Households	16	1
Total Number of persons (Adults & Children)	57	5
Number of Persons (under age 18)	23	4
Number of Persons (18 - 24)	1	0
Number of Persons (over age 24)	33	1

Unsheltered	Total
1	18
2	64
1	28
1	2
0	34

Gender	Sheltered	
(adults and children)	Emergency	Transitional
Female	25	1
Male	31	4
Gender that is not singularly 'Female' or 'Male'	0	0
Questioning	0	0
Transgender	1	0

Unsheltered	Total
1	27
1	36
0	0
0	0
0	1

Ethnicity	Sheltered	
(adults and children)	Emergency	Transitional
Non-Hispanic/Non- Latin(a)(o)(x)	53	5
Hispanic/Latin(a)(o)(x)	4	0

ed Total	Unsheltered	
2 60	2	
0	0	

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Race	Sheltered	
(adults and children)	Emergency	Transitional
American Indian, Alaska Native, or Indigenous	11	1
Asian or Asian American	0	0
Black, African American, or African	11	0
Native Hawaiian or Pacific Islander	0	0
White	29	4
Multiple Races	6	0

Chronically Homeless	Shelt	tered
(adults and children)	Emergency	Transitional
Total number of households	6	
Total number of persons	13	

Unsheltered	Total
0	12
0	0
0	11
0	0
0	33
2	8

Unsheltered	Total	
1	7	
2	15	

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Population: Sheltered and Unsheltered Count

Persons in Households with only Children

		Sheltered	Unsheltered	Total	
	Emergency	Transitional	Safe Haven		
Total Number of Households	0	0	0	0	0
Total Number of children (under age 18)	0	0	0	0	0

Gender	Sheltered			Unsheltered	Total
(only children)	Emergency	Transitional	Safe Haven		
Female	0	0	0	0	0
Male	0	0	0	0	0
Gender that is not singularly 'Female' or 'Male'	0	0	0	0	0
Questioning	0	0	0	0	0
Transgender	0	0	0	0	0

Ethnicity		Sheltered		Unsheltered	Total
(only children)	Emergency	Transitional	Safe Haven		
Non-Hispanic/Non- Latin(a)(o)(x)	0	0	0	0	0
Hispanic/Latin(a)(o)(x)	0	0	0	0	0

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Race		Sheltered		Unsheltered	Total
(only children)	Emergency	Transitional	Safe Haven		
American Indian, Alaska Native, or Indigenous	0	0	0	0	0
Asian or Asian American	0	0	0	0	0
Black, African American, or African	0	0	0	0	0
Native Hawaiian or Pacific Islander	0	0	0	0	0
White	0	0	0	0	0
Multiple Races	0	0	0	0	0

Chronically Homeless		Sheltered		Unsheltered	Total
(only children)	Emergency	Transitional	Safe Haven		
Total number of persons	0		0	0	0

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Population: Sheltered and Unsheltered Count

Persons in Households without Children

		Sheltered			Total
	Emergency	Transitional	Safe Haven		
Total Number of Households	32	7	0	71	110
Total Number of persons (Adults)	51	7	0	75	133
Number of Persons (18 - 24)	1	1	0	2	4
Number of Persons (over age 24)	50	6	0	73	129

Gender	Sheltered			Unsheltered	Total
(adults)	Emergency	Transitional	Safe Haven		
Female	17	2	0	28	47
Male	33	5	0	47	85
Gender that is not singularly 'Female' or 'Male'	0	0	0	0	0
Questioning	0	0	0	0	0
Transgender	1	0	0	0	1

Ethnicity		Sheltered	Unsheltered	Total	
(adults)	Emergency	Transitional	Safe Haven		
Non-Hispanic/Non- Latin(a)(o)(x)	49	6	0	71	126
Hispanic/Latin(a)(o)(x)	2	1	0	4	7

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Race		Sheltered		Unsheltered	Total
(adults)	Emergency	Transitional	Safe Haven		
American Indian, Alaska Native, or Indigenous	2	0	0	7	9
Asian or Asian American	0	0	0	0	0
Black, African American, or African	11	1	0	7	19
Native Hawaiian or Pacific Islander	0	0	0	0	0
White	38	6	0	58	102
Multiple Races	0	0	0	3	3

Chronically Homeless		Sheltered		Unsheltered	Total
(adults)	Emergency	Transitional	Safe Haven		
Total number of persons	15		0	40	55

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Date of PIT Count: 1/27/2022

Population: Sheltered and Unsheltered Count

Total Households and Persons

		Sheltered	Unsheltered	Total	
	Emergency	Transitional	Safe Haven		
Total Number of Households	48	8	0	72	128
Total Number of Persons	108	12	0	77	197
Number of Children (under age 18)	23	4	0	1	28
Number of Persons (18 to 24)	2	1	0	3	6
Number of Persons (over age 24)	83	7	0	73	163

Gender

		Sheltered	Unsheltered	Total	
	Emergency	Transitional	Safe Haven		
Female	42	3	0	29	74
Male	64	9	0	48	121
Gender that is not singularly 'Female' or 'Male'	0	0	0	0	0
Questioning	0	0	0	0	0
Transgender	2	0	0	0	2

Ethnicity

	Sheltered			Unsheltered	Total
	Emergency	Transitional	Safe Haven		
Non-Hispanic/Non-Latin (a)(o)(x)	102	11	0	73	186
Hispanic/Latin(a)(o)(x)	6	1	0	4	11

Race

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Point In Time Summary for OK-504 - Norman/Cleveland County CoC

	Sheltered		Unsheltered	Total	
	Emergency	Transitional	Safe Haven		
American Indian, Alaska Native, or Indigenous	13	1	0	7	21
Asian or Asian American	0	0	0	0	0
Black, African American, or African	22	1	0	7	30
Native Hawaiian or Pacific Islander	0	0	0	0	0
White	67	10	0	58	135
Multiple Races	6	0	0	5	11

Chronically Homeless		Sheltered		Unsheltered	Total
	Emergency	Transitional	Safe Haven		
Total number of persons	28		0	42	70

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Population: Sheltered and Unsheltered Count

Persons in Households with at least one Adult and one Child

	Sheltered	
	Emergency	Transitional
Total Number of Households	16	1
Total Number of persons (Adults & Children)	57	5
Number of Persons (under age 18)	23	4
Number of Persons (18 - 24)	1	0
Number of Persons (over age 24)	33	1

Unsheltered	Total
1	18
2	64
1	28
1	2
0	34

Gender	Sheltered		
(adults and children)	Emergency	Transitional	
Female	25	1	
Male	31	4	
Gender that is not singularly 'Female' or 'Male'	0	0	
Questioning	0	0	
Transgender	1	0	

Unsheltered	Total
1	27
1	36
0	0
0	0
0	1

Ethnicity	Sheltered		
(adults and children)	Emergency	Transitional	
Non-Hispanic/Non- Latin(a)(o)(x)	53	5	
Hispanic/Latin(a)(o)(x)	4	0	

Unsheltered	Total
2	60
0	4

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Race	Sheltered		
(adults and children)	Emergency	Transitional	
American Indian, Alaska Native, or Indigenous	11	1	
Asian or Asian American	0	0	
Black, African American, or African	11	0	
Native Hawaiian or Pacific Islander	0	0	
White	29	4	
Multiple Races	6	0	

Chronically Homeless	Sheltered	
(adults and children)	Emergency	Transitional
Total number of households	6	
Total number of persons	13	

Unsheltered	Total
0	12
0	0
0	11
0	0
0	33
2	8

Unsheltered	Total		
1	7		
2	15		

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Population: Sheltered and Unsheltered Count

Persons in Households with only Children

	Sheltered			Unsheltered	Total
	Emergency	Transitional	Safe Haven		
Total Number of Households	0	0	0	0	0
Total Number of children (under age 18)	0	0	0	0	0

Gender	Sheltered			Unsheltered	Total
(only children)	Emergency	Transitional	Safe Haven		
Female	0	0	0	0	0
Male	0	0	0	0	0
Gender that is not singularly 'Female' or 'Male'	0	0	0	0	0
Questioning	0	0	0	0	0
Transgender	0	0	0	0	0

Ethnicity	Sheltered			Unsheltered	Total
(only children)	Emergency	Transitional	Safe Haven		
Non-Hispanic/Non- Latin(a)(o)(x)	0	0	0	0	0
Hispanic/Latin(a)(o)(x)	0	0	0	0	0

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Race		Sheltered		Unsheltered	Total
(only children)	Emergency	Transitional	Safe Haven		
American Indian, Alaska Native, or Indigenous	0	0	0	0	0
Asian or Asian American	0	0	0	0	0
Black, African American, or African	0	0	0	0	0
Native Hawaiian or Pacific Islander	0	0	0	0	0
White	0	0	0	0	0
Multiple Races	0	0	0	0	0

Chronically Homeless		Sheltered		Unsheltered	Total
(only children)	Emergency	Transitional	Safe Haven		
Total number of persons	0		0	0	0

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Population: Sheltered and Unsheltered Count

Persons in Households without Children

		Sheltered		Unsheltered	Total
	Emergency	Transitional	Safe Haven		
Total Number of Households	32	7	0	71	110
Total Number of persons (Adults)	51	7	0	75	133
Number of Persons (18 - 24)	1	1	0	2	4
Number of Persons (over age 24)	50	6	0	73	129

Gender	Sheltered			Unsheltered	Total
(adults)	Emergency	Transitional	Safe Haven		
Female	17	2	0	28	47
Male	33	5	0	47	85
Gender that is not singularly 'Female' or 'Male'	0	0	0	0	0
Questioning	0	0	0	0	0
Transgender	1	0	0	0	1

Ethnicity	Sheltered			Unsheltered	Total
(adults)	Emergency	Transitional	Safe Haven		
Non-Hispanic/Non- Latin(a)(o)(x)	49	6	0	71	126
Hispanic/Latin(a)(o)(x)	2	1	0	4	7

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Race		Sheltered		Unsheltered	Total
(adults)	Emergency	Transitional	Safe Haven		
American Indian, Alaska Native, or Indigenous	2	0	0	7	9
Asian or Asian American	0	0	0	0	0
Black, African American, or African	11	1	0	7	19
Native Hawaiian or Pacific Islander	0	0	0	0	0
White	38	6	0	58	102
Multiple Races	0	0	0	3	3

Chronically Homeless		Sheltered		Unsheltered	Total
(adults)	Emergency	Transitional	Safe Haven		
Total number of persons	15		0	40	55

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Date of PIT Count: 1/27/2022

Population: Sheltered and Unsheltered Count

Total Households and Persons

		Sheltered			Total
	Emergency	Transitional	Safe Haven		
Total Number of Households	48	8	0	72	128
Total Number of Persons	108	12	0	77	197
Number of Children (under age 18)	23	4	0	1	28
Number of Persons (18 to 24)	2	1	0	3	6
Number of Persons (over age 24)	83	7	0	73	163

Gender

		Sheltered		Unsheltered	Total
	Emergency	Transitional	Safe Haven		
Female	42	3	0	29	74
Male	64	9	0	48	121
Gender that is not singularly 'Female' or 'Male'	0	0	0	0	0
Questioning	0	0	0	0	0
Transgender	2	0	0	0	2

Ethnicity

	Sheltered		Unsheltered	Total	
	Emergency	Transitional	Safe Haven		
Non-Hispanic/Non-Latin (a)(o)(x)	102	11	0	73	186
Hispanic/Latin(a)(o)(x)	6	1	0	4	11

Race

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Point In Time Summary for OK-504 - Norman/Cleveland County CoC

	Sheltered		Unsheltered	Total	
	Emergency	Transitional	Safe Haven		
American Indian, Alaska Native, or Indigenous	13	1	0	7	21
Asian or Asian American	0	0	0	0	0
Black, African American, or African	22	1	0	7	30
Native Hawaiian or Pacific Islander	0	0	0	0	0
White	67	10	0	58	135
Multiple Races	6	0	0	5	11

Chronically Homeless		Sheltered		Unsheltered	Total
	Emergency	Transitional	Safe Haven		
Total number of persons	28		0	42	70

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Population: Sheltered and Unsheltered Count

Persons in Households with at least one Adult and one Child

	Sheltered	
	Emergency	Transitional
Total Number of Households	16	1
Total Number of persons (Adults & Children)	57	5
Number of Persons (under age 18)	23	4
Number of Persons (18 - 24)	1	0
Number of Persons (over age 24)	33	1

Unsheltered	Total
1	18
2	64
1	28
1	2
0	34

Gender	Shelt	tered
(adults and children)	Emergency	Transitional
Female	25	1
Male	31	4
Gender that is not singularly 'Female' or 'Male'	0	0
Questioning	0	0
Transgender	1	0

Unsheltered	Total
1	27
1	36
0	0
0	0
0	1

Ethnicity	Sheltered	
(adults and children)	Emergency	Transitional
Non-Hispanic/Non- Latin(a)(o)(x)	53	5
Hispanic/Latin(a)(o)(x)	4	0

Total	Unsheltered	
60	2	
4	0	

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Race	Sheltered	
(adults and children)	Emergency	Transitional
American Indian, Alaska Native, or Indigenous	11	1
Asian or Asian American	0	0
Black, African American, or African	11	0
Native Hawaiian or Pacific Islander	0	0
White	29	4
Multiple Races	6	0

Chronically Homeless	Sheltered	
(adults and children)	Emergency	Transitional
Total number of households	6	
Total number of persons	13	

Unsheltered	Total
0	12
0	0
0	11
0	0
0	33
2	8

Unsheltered	Total
1	7
2	15

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Population: Sheltered and Unsheltered Count

Persons in Households with only Children

	Sheltered			Unsheltered	Total
	Emergency	Transitional	Safe Haven		
Total Number of Households	0	0	0	0	0
Total Number of children (under age 18)	0	0	0	0	0

Gender	Sheltered			Unsheltered	Total
(only children)	Emergency	Transitional	Safe Haven		
Female	0	0	0	0	0
Male	0	0	0	0	0
Gender that is not singularly 'Female' or 'Male'	0	0	0	0	0
Questioning	0	0	0	0	0
Transgender	0	0	0	0	0

Ethnicity	Sheltered			Unsheltered	Total
(only children)	Emergency	Transitional	Safe Haven		
Non-Hispanic/Non- Latin(a)(o)(x)	0	0	0	0	0
Hispanic/Latin(a)(o)(x)	0	0	0	0	0

Race		Sheltered		Unsheltered	Total
(only children)	Emergency	Transitional	Safe Haven		
American Indian, Alaska Native, or Indigenous	0	0	0	0	0
Asian or Asian American	0	0	0	0	0
Black, African American, or African	0	0	0	0	0
Native Hawaiian or Pacific Islander	0	0	0	0	0
White	0	0	0	0	0
Multiple Races	0	0	0	0	0

Chronically Homeless	Sheltered			Unsheltered	Total
(only children)	Emergency	Transitional	Safe Haven		
Total number of persons	0		0	0	0

Population: Sheltered and Unsheltered Count

Persons in Households without Children

	Sheltered			Unsheltered	Total
	Emergency	Transitional	Safe Haven		
Total Number of Households	32	7	0	71	110
Total Number of persons (Adults)	51	7	0	75	133
Number of Persons (18 - 24)	1	1	0	2	4
Number of Persons (over age 24)	50	6	0	73	129

Gender	Sheltered			Unsheltered	Total
(adults)	Emergency	Transitional	Safe Haven		
Female	17	2	0	28	47
Male	33	5	0	47	85
Gender that is not singularly 'Female' or 'Male'	0	0	0	0	0
Questioning	0	0	0	0	0
Transgender	1	0	0	0	1

Ethnicity	Sheltered			Unsheltered	Total
(adults)	Emergency	Transitional	Safe Haven		
Non-Hispanic/Non- Latin(a)(o)(x)	49	6	0	71	126
Hispanic/Latin(a)(o)(x)	2	1	0	4	7

Race		Sheltered		Unsheltered	Total
(adults)	Emergency	Transitional	Safe Haven		
American Indian, Alaska Native, or Indigenous	2	0	0	7	9
Asian or Asian American	0	0	0	0	0
Black, African American, or African	11	1	0	7	19
Native Hawaiian or Pacific Islander	0	0	0	0	0
White	38	6	0	58	102
Multiple Races	0	0	0	3	3

Chronically Homeless	Sheltered			Unsheltered	Total
(adults)	Emergency	Transitional	Safe Haven		
Total number of persons	15		0	40	55

Date of PIT Count: 1/27/2022

Population: Sheltered and Unsheltered Count

Total Households and Persons

	Sheltered			Unsheltered	Total
	Emergency	Transitional	Safe Haven		
Total Number of Households	48	8	0	72	128
Total Number of Persons	108	12	0	77	197
Number of Children (under age 18)	23	4	0	1	28
Number of Persons (18 to 24)	2	1	0	3	6
Number of Persons (over age 24)	83	7	0	73	163

Gender

	Sheltered			Unsheltered	Total
	Emergency	Transitional	Safe Haven		
Female	42	3	0	29	74
Male	64	9	0	48	121
Gender that is not singularly 'Female' or 'Male'	0	0	0	0	0
Questioning	0	0	0	0	0
Transgender	2	0	0	0	2

Ethnicity

	Sheltered			Unsheltered	Total
	Emergency	Transitional	Safe Haven		
Non-Hispanic/Non-Latin (a)(o)(x)	102	11	0	73	186
Hispanic/Latin(a)(o)(x)	6	1	0	4	11

Race

Point In Time Summary for OK-504 - Norman/Cleveland County CoC

		Sheltered	Unsheltered	Total	
	Emergency	Transitional	Safe Haven		
American Indian, Alaska Native, or Indigenous	13	1	0	7	21
Asian or Asian American	0	0	0	0	0
Black, African American, or African	22	1	0	7	30
Native Hawaiian or Pacific Islander	0	0	0	0	0
White	67	10	0	58	135
Multiple Races	6	0	0	5	11

Chronically Homeless		Sheltered	Unsheltered	Total	
	Emergency	Transitional	Safe Haven		
Total number of persons	28		0	42	70

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Row # Year	Proj. Type		HMIS Org ID	Project Name	HMIS Proj ID	Geo Code	HMIS-Participating	Inventory Type	Bed Type	Target P	op. Housing Type	McKinney- Vento	McKinney- Vento: Esg	McKinney- Vento: EsgEs	Year-Round Beds	Total Seasonal Beds Overflow B	eds PIT Coun	t Total Beds Utili	ization Rate
		Bridges (formerly Independent Living Services for																	
544641 2022	ES	Youth)	11458	Sooner Point Apartments ES	11944	402190	Yes	C	Facility-based beds	NA	Site-based – single site	No	No	No	1		0	0 1	0%
544642 2022	ES	Food & Shelter	11447	McKown Village Emergency	12317	402190	Yes	C	Facility-based beds	NA	Site-based – single site	No	No	No	52	2	5	2 52	100%
544640 2022	ES	Norman Agency	12095	Norman Emergency Shelter	12096	402190	Yes	C	Facility-based beds	NA	Site-based – single site	Yes	No	No	35	i l	0 3	2 35	91%
544636 2022	ES	The Salvation Army	11456	TSA Shelter Family	11540	402190	Yes	c	Facility-based beds	NA	Site-based – single site	No	No	No	8	3		5 8	62%
544638 2022	ES	Women's Resource Center	11915	WRC Shelter	11916	409027	No	c	Facility-based beds	DV	Site-based – single site	No	No	No	15	5	2	3 17	18%
544639 2022	ES	Thunderbird Clubhouse	11469	ESG 2014-2015 (Level 4)	11531	402190	Yes	С	Facility-based beds	NA	Site-based – single site	Yes	Yes	Yes	1			1 1	100%
544637 2022	ES	The Salvation Army	11456	TSA Shelter	11539	402190	Yes	С	Facility-based beds	NA	Site-based – single site	No	No	No	43	0	1	5 43	35%
		Bridges (formerly Independent Living Services for																	
544648 2022		Youth)	11458	Bridges Residential (11459)	11459	402190	Yes	C		NA	Site-based – single site	No	No	No	24		2	4 24	100%
544653 2022	PSH	Catholic Charities	11465	Catholic Charities Norman	12117	402190	Yes	C		NA	Site-based – single site	No	No	No	20		2	0 20	100%
544654 2022		Central Oklahoma Community Mental Health		State of Oklahoma PSH	11689	402190		C		NA	Site-based – clustered / multiple sites	Yes	No	No				1 1	100%
544647 2022		Food & Shelter		Food and Shelter Inc- SHP01 (11451)	11451	402190		C		NA	Tenant-based – scattered site	Yes	No	No	12		1	2 12	100%
544645 2022		HOPE Community Services		HOPE- Shelter Plus Care (Norman) (11446)	11446	402190		C		NA	Tenant-based – scattered site	Yes	No	No	18	3	1	8 18	100%
544650 2022		Thunderbird Clubhouse		Thunderbird Clubhouse PSH	11536	402190		C		NA	Tenant-based – scattered site	Yes	No	No	12	2	1	2 12	100%
544646 2022		Thunderbird Clubhouse		Thunderbird T-Bird PSH (Level 4)	11535	402190		C		NA	Tenant-based – scattered site	Yes	No	No				2 2	100%
544651 2022		Veteran Affairs Norman		zVA Norman-VASH (PSH) (INV)	12148	402190		C		NA	Site-based – single site	No	No	No	4			4 4	100%
544652 2022		Food & Shelter		ESG RRH	11455	402190		C		NA	Site-based – single site	Yes	Yes	No	22		2	2 22	100%
544655 2022	RRH	Food & Shelter	11447	Food and Shelter ESG Re-Housing COVID	12246	402190		C		NA	Site-based – single site	Yes	Yes	No	24		2	4 24	100%
544649 2022	RRH	Goodwill	11426	SSVF Re-Housing	11427	402190		C		NA	Tenant-based – scattered site	No	No	No	(0 0	
544656 2022	RRH	Thunderbird Clubhouse	11469	Thunderbird-RapidReHousing COVID	12288	402190	Yes	C		NA	Site-based – clustered / multiple sites	Yes	Yes	No	27	,	2	7 27	100%
544644 2022	TH	Food & Shelter	11447	McKown Village	11795	402190	Yes	c		NA	Site-based – single site	No	No	No		5		5 5	100%
544643 2022	TH	Transition House	11913	Duffy Apartments	11914	402190	No	c		NA	Site-based – clustered / multiple sites	No	No	No	12	2		7 12	58%
															Sum : 338	Sum · 0 Sum · 2	Sum : 286		

Summary Level: City

Created on: March 3, 2023

Data for: Norman city, Oklahoma

Year Selected: 2015-2019 ACS

Income Distribution Overview	Owner	Renter	Total	
Household Income less-than or= 30% HAMFI	1,255	5,625	6,880	
Household Income >30% to less-than or= 50% HAMFI	1,770	4,370	6,140	
Household Income >50% to less-than or= 80% HAMFI	2,935	5,260	8,195	
Household Income >80% to less-than or=100% HAMFI	2,800	2,480	5,280	
Household Income >100% HAMFI	16,530	4,890	21,420	
Total	25,290	22,625	47,915	
Housing Problems Overview 1	Owner	Renter	Total	
Household has at least 1 of 4 Housing Problems	4,155	10,090	14,245	
Household has none of 4 Housing Problems	21,135	12,535	33,670	
Cost burden not available, no other problems				
Total	25,290	22,625	47,915	
Severe Housing Problems Overview 2	Owner	Renter	Total	
Household has at least 1 of 4 Severe Housing Problems	1,855	5,595	7,450	
Household has none of 4 Severe Housing Problems	23,430	17,030	40,460	
Cost burden not available, no other problems				
Total	25,290	22,625	47,915	
Housing Cost Burden Overview 3	Owner	Renter	Total	
Cost Burden less-than or= 30%	21,410	12,045	33,455	
Cost Burden >30% to less-than or= 50%	2,340	4,790	7,130	
Cost Burden >50%	1,395	4,900	6,295	
Cost Burden not available	145	890	1,035	
Total	25,290	22,625	47,915	
Income by Housing Problems (Owners and Renters)	Household has at least 1 of 4	Household has none of	Cost Burden not available,	Total
	Housing Problems	4 Housing Problems	no other housing problem	
Household Income less-than or= 30% HAMFI	5,465	1,410		6,880

Household Income >30% to less-than or= 50%	4,460	1,680		Item 13. 140
Household Income >50% to less-than or= 80% HAMFI	2,540	5,655		8,195
Household Income >80% to less-than or= 100% HAMFI	745	4,535		5,280
Household Income >100% HAMFI	1,025	20,395		
Total	14,245	33,670		47,915
Income by Housing Problems (Renters only)	Household has at least 1 of 4	Household has none of	Cost Burden not available,	Total
	Housing Problems	4 Housing Problems	no other housing problem	
Household Income less-than or= 30% HAMFI	4,470	1,150		5,625
Household Income >30% to less-than or= 50% HAMFI	3,550	820		4,370
Household Income >50% to less-than or= 80% HAMFI	1,600	3,660		5,260
Household Income >80% to less-than or= 100% HAMFI	325	2,155		2,480
Household Income >100% HAMFI	135	4,755		4,890
Total	10,090	12,535		22,625
Income by Housing Problems (Owners only)	Household has at least 1 of 4	Household has none of	Cost Burden not available,	Total
	Housing Problems	4 Housing Problems	no other housing problem	
Household Income less-than or= 30% HAMFI	995	260		1,255
Household Income >30% to less-than or= 50% HAMFI	910	860		1,770
Household Income >50% to less-than or= 80% HAMFI	940	1,995		2,935
Household Income >80% to less-than or= 100% HAMFI	420	2,380		2,800
Household Income >100% HAMFI	890	15,640		16,530
Total	4,155	21,135		25,290
Income by Cost Burden (Owners and Renters)	Cost burden > 30%	Cost burden > 50%	Total	
Household Income less-than or= 30% HAMFI	5,380	4,560	6,880	
Household Income >30% to less-than or= 50% HAMFI	4,350	1,390	6,140	
Household Income >50% to less-than or= 80% HAMFI	2,280	230	8,195	

Household Income >80% to less-than or= 100% HAMFI	695	20	5,280	Item 13.
Household Income >100% HAMFI	725	100	21,420	
Total	13,430	6,295	47,915	
Income by Cost Burden (Renters only)	Cost burden > 30%	Cost burden > 50%	Total	
Household Income less-than or= 30% HAMFI	4,425	3,815	5,625	
Household Income >30% to less-than or= 50% HAMFI	3,490	1,000	4,370	
Household Income >50% to less-than or= 80% HAMFI	1,455	85	5,260	
Household Income >80% to less-than or= 100% HAMFI	305		2,480	
Household Income >100% HAMFI	15		4,890	
Total	9,690	4,900	22,625	
Income by Cost Burden (Owners only)	Cost burden > 30%	Cost burden > 50%	Total	
Household Income less-than or= 30% HAMFI	955	745	1,255	
Household Income >30% to less-than or= 50% HAMFI	855	385	1,770	
Household Income >50% to less-than or= 80% HAMFI	825	145	2,935	
Household Income >80% to less-than or= 100% HAMFI	390	20	2,800	
Household Income >100% HAMFI	710	100	16,530	
Total	3,735	1,395	25,290	

^{1.} The four housing problems are: incomplete kitchen facilities, incomplete plumbing facilities, more than 1 person per room, and cost burden greater than 30%.

^{2.} The four severe housing problems are: incomplete kitchen facilities, incomplete plumbing facilities, more than 1 person per room, and cost burden greater than 50%.

^{3.} Cost burden is the ratio of housing costs to household income. For renters, housing cost is gross rent (contract rent plus utilities). For owners, housing cost is "select monthly owner costs", which includes mortgage payment, utilities, association fees, insurance, and real estate taxes.

File Attachments for Item:

14. CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF RESOLUTION R-2223-76: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, AMENDING THE NORMAN 2025 LAND USE AND TRANSPORTATION PLAN SO AS TO REMOVE LOT ONE (1), IN BLOCK ONE (1), OF HISTORIC BERRY FARMS ADDITION, TO NORMAN, CLEVELAND COUNTY, OKLAHOMA, FROM THE COMMERCIAL DESIGNATION AND HIGH DENSITY RESIDENTIAL DESIGNATION AND PLACE THE SAME IN THE COMMERCIAL DESIGNATION. (1300 WEST LINDSEY STREET)



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 03/14/2023

REQUESTER: Sooner Traditions Realty, L.L.C.

PRESENTER: Jane Hudson, Director of Planning & Community Development

ITEM TITLE: CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION,

AMENDMENT. POSTPONEMENT OF AND/OR RESOLUTION R-2223-76: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, AMENDING THE NORMAN 2025 LAND USE AND TRANSPORTATION PLAN SO AS TO REMOVE LOT ONE (1), IN BLOCK ONE (1), OF HISTORIC BERRY FARMS ADDITION. TO NORMAN. CLEVELAND COUNTY, OKLAHOMA, COMMERCIAL DESIGNATION AND HIGH DENSITY RESIDENTIAL DESIGNATION AND PLACE THE SAME IN THE COMMERCIAL

DESIGNATION. (1300 WEST LINDSEY STREET)

SUMMARY OF REQUEST:

Sooner Traditions Realty, L.L.C, is proposing the development of a commercial and office SPUD, Simple Planned Unit Development, on a 2.19 acre parcel. The proposed development will include two buildings; one is an existing office building and one will be a new multi-tenant building. This development proposal requires rezoning from CO, Suburban Office Commercial District, and R-3, Multi-Family Dwelling District, to SPUD, Simple Planned Unit Development. This proposal also requires a NORMAN 2025 Land Use and Transportation Plan amendment from Commercial Designation and High Density Residential Designation to Commercial Designation.

STAFF ANALYSIS: For changes in classification under the NORMAN 2025 Land Use and Transportation Plan, the following information is forwarded for consideration.

The role of the NORMAN 2025 Plan in the City's ongoing and diverse planning activities states the document must be flexible, and that it is updated and amended periodically. The Plan defines the desired land use patterns for use and development of all private sector properties. This Plan will serve as a policy guide for zoning and planning requests as they are presented to the Planning Commission and City Council.

 Has there been a change in circumstances resulting from development of the properties in the general vicinity which suggest that the proposed change will not be contrary to the public interest? Public Works worked with Gateway Consulting and SAIC to develop a redesign of the streetscape on W. Lindsey Street from 24th Ave SW to just east of S. Berry Rd. Construction of the project was completed in 2017. The project was created to help spark redevelopment of W. Lindsey Street in this general area. The lot on the southeast corner of the intersection at W. Lindsey St. and S. Berry Rd., 1150 W. Lindsey St., was recently redeveloped as a restaurant and a lot south of the restaurant was redeveloped as an additional parking area the serve the restaurant. The lot was rezoned as CO with Special Use for a parking lot and designated as Commercial on the NORMAN 2025 Land Use and Transportation Plan. The lot on the southwest corner was also redeveloped from a gas station/convenience store to a new Starbucks.

2. Is there a determination that the proposed change would not result in adverse land use or adverse traffic impacts to surrounding properties or the vicinity? Because the existing access point on W. Lindsey St. is not changing with the proposed development, no traffic study is required by Public Works. There is no proposed access point on Rebecca Ln. so the development will not direct any commercial traffic into the neighborhood, negatively impacting the residences in the neighborhood to the south.

CONCLUSION:

Staff forwards this request for amendment of the NORMAN 2025 Land Use Plan from Commercial Designation and High Density Residential Designation to Commercial Designation as Resolution No. R-2223-76 for consideration by City Council. At their January 12, 2023 meeting, Planning Commission unanimously recommended adoption of Resolution R-2223-76, by a vote of 9-0.

Resolution

R-2223-76

A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, AMENDING THE NORMAN 2025 LAND USE AND TRANSPORTATION PLAN SO AS TO REMOVE LOT ONE (1), IN BLOCK ONE (1), OF HISTORIC BERRY FARMS ADDITION, TO NORMAN, CLEVELAND COUNTY, OKLAHOMA, **FROM** THE **COMMERCIAL** DESIGNATION AND HIGH DENSITY RESIDENTIAL DESIGNATION AND **PLACE** THE SAME $\mathbb{I}\!\mathbb{N}$ THE COMMERCIAL DESIGNATION. (1300)WEST LINDSEY STREET)

- § 1. WHEREAS, the Council of the City of Norman recognizes citizens' concerns about the future development of Norman; and
- § 2. WHEREAS, the City Council at its meeting of November 16, 2004, reviewed and adopted the NORMAN 2025 Land Use and Transportation Plan; and
- § 3. WHEREAS, Sooner Traditions Realty, L.L.C., has requested that the following described property be moved from the Commercial Designation and High Density Residential Designation and placed in the Commercial Designation, to wit:

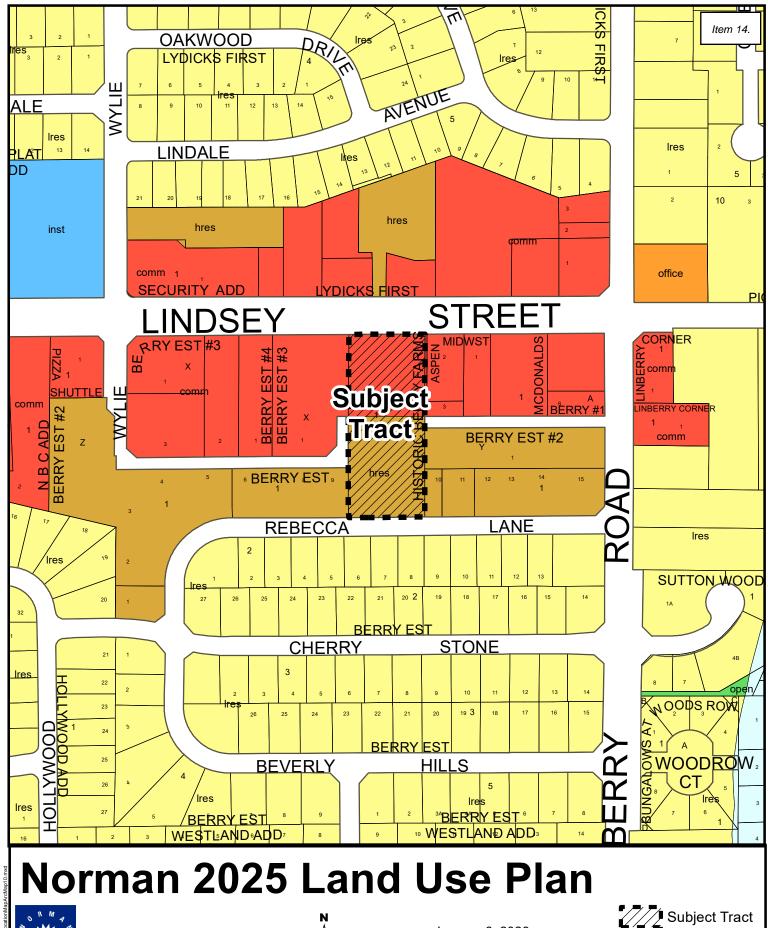
Lot One (1), in Block One (1) of Historic Berry Farms Addition, to Norman, Cleveland County, Oklahoma, according to the recorded plat thereof:

NOW, THEREFORE BE IT RESOLVED BY THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA:

§ 4. That the Council of the City of Norman recognizes the need to control the future growth of the City of Norman; and, that after due consideration, has determined that the requested amendment is compatible with the adopted NORMAN 2025 Land Use and Transportation Plan should be adopted, and does hereby approve the requested amendment.

PASSED and ADOPTED this day of	, 2023.	
ATTEST:	Mayor	
City Clerk		





Map Produced by the City of Norman Geographic Information System. The City of Norman assumes no responsibility for errors or omissions in the information presented.



January 6, 2023

125 250 Ft.

730

Planning Commission Agenda January 12, 2023

RESOLUTION NO. R-2223-76

ITEM NO. 4

STAFF REPORT

ITEM: Sooner Traditions Realty, L.L.C. requests amendment of the NORMAN 2025 Land Use and Transportation Plan from Commercial Designation and High Density Residential Designation to Commercial Designation for approximately 2.19 acres of property located at 1300 W. Lindsey Street.

SUMMARY OF REQUEST: Sooner Traditions Realty, L.L.C, is proposing the development of a commercial and office SPUD, Simple Planned Unit Development, on a 2.19 acre parcel. The proposed development will include two buildings; one is an existing office building and one will be a new multi-tenant building. This development proposal requires rezoning from CO, Suburban Office Commercial District, and R-3, Multi-Family Dwelling District, to SPUD, Simple Planned Unit Development. This proposal also requires a NORMAN 2025 Land Use and Transportation Plan amendment from Commercial Designation and High Density Residential Designation to Commercial Designation.

STAFF ANALYSIS: For changes in classification under the NORMAN 2025 Land Use and Transportation Plan, the following information is forwarded for consideration.

The role of the NORMAN 2025 Plan in the City's ongoing and diverse planning activities states the document must be flexible, and that it is updated and amended periodically. The Plan defines the desired land use patterns for use and development of all private sector properties. This Plan will serve as a policy guide for zoning and planning requests as they are presented to the Planning Commission and City Council.

- 1. Has there been a change in circumstances resulting from development of the properties in the general vicinity which suggest that the proposed change will not be contrary to the public interest? Public Works worked with Gateway Consulting and SAIC to develop a redesign of the streetscape on W. Lindsey Street from 24th Ave SW to just east of S. Berry Rd. Construction of the project was completed in 2017. The project was created to help spark redevelopment of W. Lindsey Street in this general area. The lot on the southeast corner of the intersection at W. Lindsey St. and S. Berry Rd., 1150 W. Lindsey St., was recently redeveloped as a restaurant and a lot south of the restaurant was redeveloped as an additional parking area the serve the restaurant. The lot was rezoned as CO with Special Use for a parking lot and designated as Commercial on the NORMAN 2025 Land Use and Transportation Plan. The lot on the southwest corner was also redeveloped from a gas station/convenience store to a new Starbucks.
- 2. Is there a determination that the proposed change would not result in adverse land use or adverse traffic impacts to surrounding properties or the vicinity?

 Because the existing access point on W. Lindsey St. is not changing with the proposed development, no traffic study is required by Public Works. There is no proposed access point on Rebecca Ln. so the development will not direct any commercial traffic into the neighborhood, negatively impacting the residences in the neighborhood to the south.

CONCLUSION: Staff forwards this request for amendment of the NORMAN 2025 Land Use Plan from Commercial Designation and High Density Residential Designation to Commercial Designation as Resolution No. R-2223-76 for consideration by Planning Commission and recommendation to City Council.





CITY OF NORMAN, OR PLANNING COMMISSION MEETING

Municipal Building, Council Chambers, 201 West Gray, Norman, OK 73069 Thursday, January 12, 2023 at 6:30 PM

MINUTES

The Planning Commission of the City of Norman, Cleveland County, State of Oklahoma, met in Regular Session in Council Chambers of the Norman Municipal Building, 201 West Gray Street, on the 12th day of January, 2023.

Notice and agenda of the meeting were posted at the Norman Municipal Building and online at https://norman-ok.municodemeetings.com at least twenty-four hours prior to the beginning of the meeting.

Chair Erica Bird called the meeting to order at 6:30 p.m.

ROLL CALL

PRESENT

Cameron Brewer
Kevan Parker
Liz McKown
Steven McDaniel
Erica Bird
Douglas McClure
Jim Griffith
Maria Kindel
Michael Jablonski

A quorum was present.

STAFF MEMBERS PRESENT

Jane Hudson, Director, Planning & Community Development Lora Hoggatt, Planning Services Manager Colton Wayman, Planner I Beth Muckala, Assistant City Attorney Todd McLellan, Development Engineer Roné Tromble, Recording Secretary Mitchell Richardson, Multimedia Supervisor

1. Election of Officers

Motion made by Steven McDaniel to nominate Erica Bird as Chair, Kevan Parker as Vice Chair, and Michael Jablonski as Secretary; seconded by Liz McKown.

Voting Yea: Brewer, Parker, McKown, McDaniel, Bird, McClure, Griffith, Kindel, Jablonski

NORMAN 2025/Simple Planned Unit Development

4. Consideration of Approval, Acceptance, Rejection, Amendment, and/or Postponement of Resolution No. R-2223-76: Sooner Traditions Realty, L.L.C. requests amendment of the NORMAN 2025 Land Use & Transportation Plan from Commercial Designation and High Density Residential Designation to Commercial Designation for approximately 2.19 acres of property located at 1300 W. Lindsey Street.

ITEMS SUBMITTED FOR THE RECORD:

- 1. NORMAN 2025 Map
- 2. Staff Report

and

5. Consideration of Approval, Acceptance, Rejection, Amendment, and/or Postponement of Ordinance No. O-2223-22: Sooner Traditions Realty, L.L.C. requests rezoning from CO, Suburban Office Commercial District, and R-3, Multi-Family Dwelling District, to SPUD, Simple Planned Unit Development, for approximately 2.19 acres of property located at 1300 W. Lindsey Street.

ITEMS SUBMITTED FOR THE RECORD:

- Location Map
- 2. Staff Report
- 3. 1300 W. Lindsey SPUD Narrative with Exhibits A-D

PRESENTATION BY STAFF: Mr. Wayman reviewed the staff report, a copy of which is filed with the minutes.

PRESENTATION BY THE APPLICANT: Sean Rieger, Rieger Law Group, representing the applicant, presented the project.

Mr. Griffith asked if the existing law office will be retained as a law office. Mr. Rieger responded that the structure will be retained, but the uses could change.

Mr. Griffith asked about the large green space and maintenance of it. Mr. Rieger responded.

Mr. Parker commented there may be a water line that runs through the area designated for storm water detention. Mr. Rieger responded.

Ms. McKown commended the applicant on keeping the mature trees and open space. Mr. Jablonski agreed.

Mr. Jablonski asked about how far a nearby cell tower is from the buildings. Mr. Rieger responded that he did not know, but he believes the ordinance discusses a 200' separation for residential uses.

Ms. Bird asked if the median on Lindsey is blocking the ability to make a left turn into the property. Mr. Rieger responded that Lindsey Street allows U-turns.

AUDIENCE PARTICIPATION:

Adam Ross, 3308 Winchester Circle, made comments regarding rezoning of R-3, pedestrian connectivity to Rebecca Lane, and a large mature tree.

Braelyn Polite, 240 E. Kerr, Midwest City, made comments.

DISCUSSION AND ACTION BY THE PLANNING COMMISSION:

Mr. Jablonski asked what would happen if there is a water line in the front of the property. Mr. Rieger responded.

Mr. Parker commented on rain gardens. Mr. Rieger responded.

Mr. Griffith asked if there is any way the mature tree near the rain gardens can be saved. Mr. Rieger said they will look at it.

Mr. Brewer commented he thinks this plan is in the spirit of the 2025 plan. This was a prime opportunity to have more creativity with the development, specifically with the orientation of the building on the site to address the sea of parking along Lindsey Street.

Mr. Jablonski asked if there is a way to stimulate the kind of development that the Commission thinks would be more productive in terms of beautifying the area.

Motion made by Kevan Parker to recommend approval of Resolution No. R-2223-76 and Ordinance No. O-2223-22 to City Council; seconded by Steven McDaniel.

Voting Yea: Brewer, Parker, McKown, McDaniel, Bird, McClure, Griffith, Kindel, Jablonski

The motion to recommend approval of Resolution R-2223-76 and Ordinance O-2223-22 to City Council passed by a vote of 9-0.

File Attachments for Item:

15. CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF ORDINANCE O-2223-22 DPON SECOND AND FINAL READING: AN ORDINANCE OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, AMENDING SECTION 460 OF CHAPTER 22 OF THE CODE OF THE CITY OF NORMAN SO AS TO REMOVE LOT ONE (1), BLOCK ONE (1), OF HISTORIC BERRY FARMS ADDITION, TO NORMAN, CLEVELAND COUNTY, OKLAHOMA, FROM THE CO, SUBURBAN OFFICE COMMERCIAL DISTRICT, AND R-3, MULTI-FAMILY DWELLING DISTRICT, AND PLACE SAME IN THE SPUD, SIMPLE PLANNED UNIT DEVELOPMENT DISTRICT; AND PROVIDING FOR THE SEVERABILITY THEREOF. (1300 WEST LINDSEY STREET)



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 02/28/2023

REQUESTER: Sooner Traditions Realty, L.L.C.

PRESENTER: Jane Hudson, Director of Planning & Community Development

ITEM TITLE: CONSIDERATION OF APPROVAL, ACCEPTANCE, REJECTION,

AMENDMENT, AND/OR POSTPONEMENT OF ORDINANCE 0-2223-22 DPON SECOND AND FINAL READING: AN ORDINANCE OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, AMENDING SECTION 460 OF CHAPTER 22 OF THE CODE OF THE CITY OF NORMAN SO AS TO REMOVE LOT ONE (1), BLOCK ONE (1), OF HISTORIC BERRY FARMS ADDITION, TO NORMAN, CLEVELAND COUNTY, OKLAHOMA, FROM THE CO, SUBURBAN OFFICE COMMERCIAL DISTRICT, AND R-3. MULTI-FAMILY DWELLING DISTRICT, AND PLACE SAME IN THE SPUD, SIMPLE PLANNED UNIT DEVELOPMENT DISTRICT: AND **PROVIDING FOR** THE

SEVERABILITY THEREOF. (1300 WEST LINDSEY STREET)

PROJECT OVERVIEW:

The applicant, Sooner Traditions Realty, L.L.C., is requesting a rezoning from CO, Suburban Office Commercial District, and R-3, Multi-Family Dwelling District, to SPUD, Simple Planned Unit Development, for approximately 2.19 acres at 1300 W. Lindsey St. The northern portion of the subject property was zoned CO, Suburban Office Commercial District, with Ordinance O-0102-48 and the southern portion was zoned R-3, Multi-Family Dwelling District, with Ordinance 1951.

PROCEDURAL REQUIREMENTS:

GREENBELT MEETING: GB22-19, December 20, 2022

This item was on the consent docket for the Greenbelt Commission. There were no comments to be forwarded to Planning Commission.

PRE-DEVELOPMENT MEETING: PD22-27, November 17, 2022

The neighbor was interested with alley access and was curious about alternative access to the site. The applicant stated that alternative access was considered. The neighbor also was concerned about the drive thru lane and how many cars it can accommodate at one time. The applicant stated that about 10-12 cars can fit in the drive thru lane at one time. A neighbor voiced his support for the development and thinks this will be a great addition for the community.

ZONING ORDINANCE CITATION:

SEC 420.05 - SIMPLE PLANNED UNIT DEVELOPMENTS

1. General Description. The Simple Planned Unit Development referred to as SPUD, is a special zoning district that provides an alternate approach to the conventional land use controls and to a PUD, Planned Unit Development to maximize the unique physical features of a particular site and produce unique, creative, progressive, or quality land developments.

The SPUD may be used for particular tracts or parcels of land that are to be developed, according to a SPUD Narrative and a Development Plan Map and contains less than five (5) acres.

The SPUD is subject to review procedures by Planning Commission and adoption by City Council.

2. Statement of Purpose. It is the intent of this section to encourage developments with a superior built environment brought about through unified development and to provide for the application of design ingenuity in such developments while protecting existing and future surrounding areas in achieving the goals of comprehensive plan of record. In addition, the SPUD provides for the following:

Encourage efficient, innovative use of land in the placement and/or clustering of buildings in a development and protect the health, safety and welfare of the community.

Contribute to the revitalization and/or redevelopment of areas where decline of any type has occurred.

Promote infill development that is compatible and harmonious with adjacent uses and would otherwise not be an area that could physically be redeveloped under conventional zoning.

Maintain consistency with the City's Zoning Ordinance, and other applicable plans, policies, standards and regulations on record.

Approval of a zone change to a SPUD adopts the Master Plan prepared by the applicant and reviewed as a part of the application. The SPUD establishes new and specific requirements for the amount and type of land use, residential densities, if appropriate, development regulations and location of specific elements of the development, such as open space and screening.

STAFF ANALYSIS: The particulars of this PUD include:

USE: This SPUD proposes certain commercial and office uses for the property. Short-term rental is also in the proposed uses. A complete list of proposed uses is included as Exhibit C in the SPUD Narrative.

OPEN SPACE: A large portion of Parcel B (as shown on the site plan) will be preserved as open space. There are no buildings proposed south of the existing office building. A total of 1.12 acres, or 51% of the site, is proposed as open space for the development.

PARKING: The SPUD Narrative states the parking will meet the City's parking ordinances. There are no minimum requirements for parking spaces at this time. The applicant is proposing parking as demonstrated on the Site Development Plan, which shows spaces along the west, north, and east property lines of Parcel A and interior spaces near the buildings.

PHASES: It is anticipated Parcel A will be developed first; however, this will depend on market demand and absorption rates.

SITE PLAN/ACCESS: There are two proposed access points for this development. There is one existing access point off W. Lindsey St. The applicant proposes to extend the existing alley that is on the eastern side of the property, which will become the second access point. The existing office building on Parcel B will remain. A new multi-tenant building with a drive-thru lane on the south side is proposed on Parcel A.

AREA REGULATIONS: The area regulations in the SPUD Narrative are as follows:

- Front Setback: All buildings shall be set back a minimum of twenty-five (25) feet from the northernmost property line of Parcel A and Parcel B.
- Side Setback: There shall be a minimum five (5) feet building setback on both Parcel A and Parcel B measured from the easternmost and westernmost property lines.
- Rear Setback: All buildings shall be set back a minimum of twenty (20) feet from the southernmost property line of Parcel A. All buildings shall be set back a minimum of thirty (30) feet from the southernmost property line Parcel B
- Height: No buildings shall exceed three and one-half (3-1/2) stories or forty-five (45) feet in height, excluding any necessary roof top mechanical units, equipment, screening, or parapet walls.

LANDSCAPING: The Site Development Plan shows which existing trees will remain. These trees will be trimmed to clear any sight issues at the drive. The SPUD Narrative says the development will meet or exceed the City's landscaping requirements.

SIGNAGE: The development will meet the commercial sign requirements in Chapter 18, Sign Regulations.

LIGHTING: The exterior lighting for the proposed development will meet the requirements of the City's Commercial Outdoor Lighting Standards. This will require full cut-off lighting.

EXISTING ZONING: The existing zoning for the subject property is CO, Suburban Office Commercial District, and R-3, Multi-Family Dwelling District. The CO District allows for offices, assembly halls, art galleries, and other lower intensity uses, as well as short-term rentals. The R-3 District allows for single-family uses, two-family dwellings, and apartment houses.

ALTERNATIVES/ISSUES:

IMPACTS: The proposed SPUD would allow for more intense uses than the current zoning; however, the surrounding properties on W. Lindsey St. are commercial districts allowing for similar uses. The proposed site plan does not allow for access on Rebecca Ln., which has mostly residential uses. This development would not cause higher traffic in the neighborhood to the

south. The existing green space between the existing office building and Rebecca Ln. will be preserved.

OTHER AGENCY COMMENTS:

BOARD OF PARKS COMMISSIONERS: N/A for this item.

UTILITIES: Water service from the existing 24-inch line will require a tee and fire hydrant for connection of services and no direct service taps on the 24-inch line will be allowed. The proposed monument sign cannot be over the water main and no detention is allowed over the water main. For sewer service, no service taps allowed on the 21-inch sewer line along Lindsey Street but service into the manhole would be acceptable. Sewer extension from adjacent properties may be necessary for service to the rear structure. Dumpster location is acceptable for solid waste service. No recycling service since the location will be commercial.

PUBLIC WORKS/ENGINEERING: A drainage report has been submitted by the applicant. Detention is being provided for the development.

TRAFFIC ENGINEER: Because the existing access point off W. Lindsey St. is not changing, no traffic study is required for this development.

FIRE DEPARTMENT: No comments from the Fire Department.

CONCLUSION:

Staff forwards this request for rezoning from CO, Suburban Office Commercial District, and R-3, Multi-Family Dwelling District, to SPUD, Simple Planned Unit Development, and Ordinance O-2223-22 for consideration by City Council. At their January 12, 2023 meeting, Planning Commission unanimously recommended adoption of Ordinance O-2223-23, by a vote of 9-0.

O-2223-22

AN ORDINANCE OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, AMENDING SECTION 460 OF CHAPTER 22 OF THE CODE OF THE CITY OF NORMAN SO AS TO REMOVE LOT ONE (1), BLOCK ONE (1), OF HISTORIC BERRY FARMS ADDITION, TO NORMAN, CLEVELAND COUNTY, OKLAHOMA, FROM THE CO, SUBURBAN OFFICE COMMERCIAL DISTRICT, AND R-3, MULTI-FAMILY DWELLING DISTRICT, AND PLACE SAME IN THE SPUD, SIMPLE PLANNED UNIT DEVELOPMENT DISTRICT; AND PROVIDING FOR THE SEVERABILITY THEREOF. (1300 WEST LINDSEY STREET)

- § 1. WHEREAS, Sooner Traditions Realty, L.L.C., the owners of the hereinafter described property, have made application to have the subject property removed from the CO, Suburban Office Commercial District, and R-3, Multi-Family Dwelling District, and placed in the SPUD, Simple Planned Unit Development District; and
- § 2. WHEREAS, said application has been referred to the Planning Commission of said City and said body has, after conducting a public hearing as required by law, considered the same and recommended that the same should be granted and an ordinance adopted to effect and accomplish such rezoning; and
- § 3. WHEREAS, the City Council of the City of Norman, Oklahoma, has thereafter considered said application and has determined that said application should be granted and an ordinance adopted to effect and accomplish such rezoning.

NOW, THEREFORE, BE IT ORDAINED BY THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA:

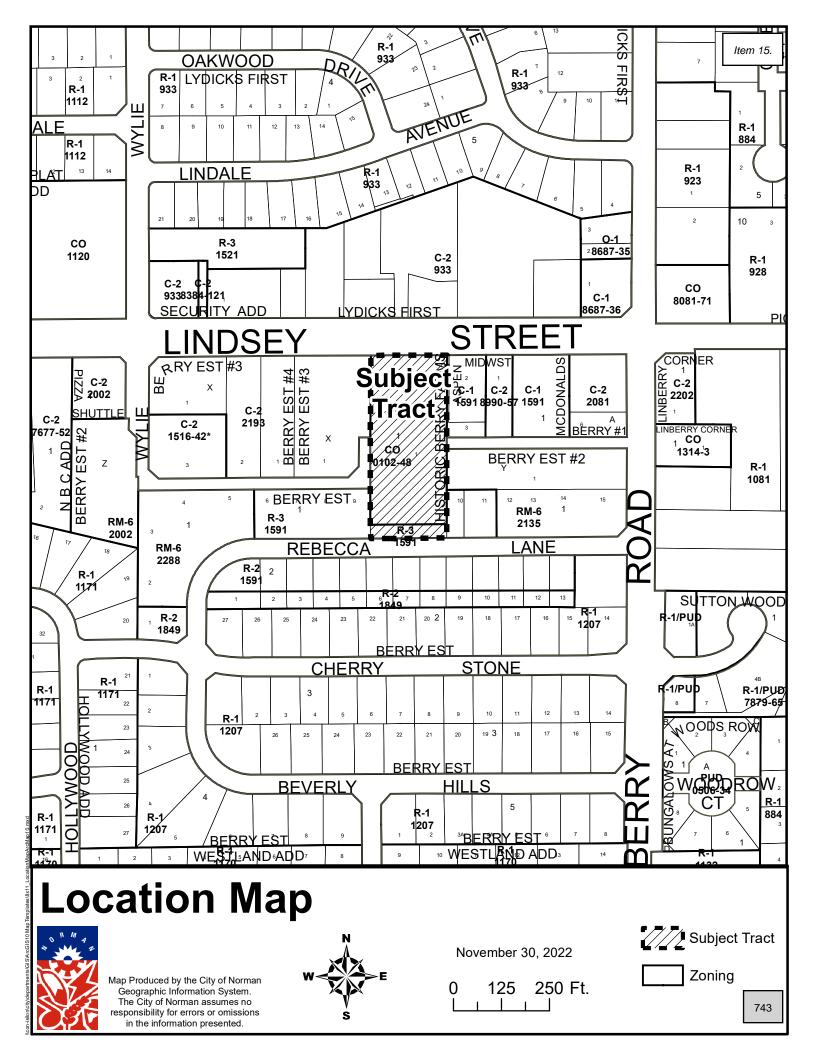
§ 4. That Section 460 of Chapter 22 of the Code of the City of Norman, Oklahoma, is hereby amended so as to remove the following described property from the CO, Suburban Office Commercial District, and R-3, Multi-Family Dwelling District, and place the same in the SPUD, Simple Planned Unit Development District, to wit:

Lot One (1), in Block One (1), of Historic Berry Farms Addition, to Norman, Cleveland County, Oklahoma, according to the recorded plat thereof.

Ordinance O-2223-22	2
Page 2	

- § 5. Further, pursuant to the provisions of Section 22:420.05 of the Code of the City of Norman, as amended, the following condition is hereby attached to the zoning of the tract:
 - a. The site shall be developed in accordance with the SPUD Narrative, Site Development Plan, and supporting documentation approved by the Planning Commission on January 12, 2023, and made a part hereof.
- § 6. <u>Severability</u>. If any section, subsection, sentence, clause, phrase, or portion of this ordinance is, for any reason, held invalid or unconstitutional by any court of competent jurisdiction, such portion shall be deemed a separate, distinct, and independent provision, and such holding shall not affect the validity of the remaining portions of this ordinance.

ADOPTED this	day of	NOT ADOPTED this	day of
	, 2023.		, 2023.
(Mayor)		(Mayor)	
ATTEST:			
(City Clerk)			



1300 W. LINDSEY

SIMPLE PLANNED UNIT DEVELOPMENT

APPLICANT:

SOONER TRADITIONS REALTY, LLC

APPLICATION FOR:

SIMPLE PLANNED UNIT DEVELOPMENT NORMAN 2025 AMENDMENT

NOVEMBER 28, 2022 REVISED DECEMBER 22, 2022

PREPARED BY:

RIEGER LAW GROUP PLLC 136 Thompson Drive Norman, Oklahoma 73069

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II. PROPERTY DESCRIPTION/EXISTING PROPERTY CONDITIONS

- A. Location
- B. Existing Land Use and Zoning
- C. Elevation and Topography
- D. Utility Services
- E. Fire Protection Services
- F. Traffic Circulation and Access

III. DEVELOPMENT PLAN AND DESIGN CONCEPT

- A. Permitted Uses
- B. Development Criteria

EXHIBITS

- A. Legal Description
- B. Preliminary Site Development Plan
- C. Allowable Uses

I. <u>INTRODUCTION</u>

This Simple Planned Unit Development (the "SPUD") is being submitted for the property located at 1300 W. Lindsey Street, as more particularly described on **Exhibit A** (the "**Property**"). This SPUD seeks to facilitate a development featuring commercial, retail, and office buildings on the Property, in accordance with the development regulations contained in this SPUD. The Applicant will subsequently seek a short form plat bifurcating the Property into the two parcels shown on the attached Preliminary Site Development Plan. This SPUD will allow for development that is compatible with the surrounding uses, while maintaining substantial green space to the rear of the Property.

II. PROPERTY DESCRIPTIONS; EXISTING CONDITIONS

A. Location

The Property is located at 1300 W. Lindsey Street.

B. Existing Land Use and Zoning

The existing zoning is CO, Suburban Office Commercial and R-3, Multi-Family Dwelling District. The existing NORMAN 2025 Land Use Plan designation is Commercial and High Density Residential. The Applicant seeks to rezone the Property, pursuant to this SPUD, and amend the Property's NORMAN 2025 Land Use Plan designation to Commercial.

C. Elevation and Topography; Drainage

The Property is generally flat with little elevation change throughout. An existing office is located on the Property.

D. Utility Services

The necessary utility services for this project are already located on or near the Property.

E. Fire Protection Services

Fire protection services shall be provided in accordance with all applicable City of Norman regulations for such services.

F. Traffic Circulation and Access

Traffic circulation and access to the Property shall be allowed in the manner shown on the attached Preliminary Site Development Plan. As noted on the Preliminary Site Development Plan, no access will be permitted to Rebecca Lane.

III. <u>DEVELOPMENT PLAN AND DESIGN CONCEPT</u>

A. Uses Permitted

This SPUD will feature commercial, retail, and office uses. A complete list of allowable uses on the Property is attached as **Exhibit C**.

B. Site Plan

The Property shall be developed as depicted on the Preliminary Site Development Plan, attached hereto as **Exhibit B**, subject to final design development and the changes allowed by Section 22.420.05(11) of the City of Norman's SPUD Ordinance, as may be amended from time to time.

C. Area Regulations

Front Setback: All buildings shall be set back a minimum of twenty-five (25) feet from the northernmost property line of Parcel A and Parcel B.

Side Setback: There shall be a minimum five (5) feet building setback on both Parcel A and Parcel B measured from the easternmost and westernmost property lines.

Rear Setback: All buildings shall be set back a minimum of twenty (20) feet from the southernmost property line of Parcel A. All buildings shall be set back a minimum of thirty (30) feet from the southernmost property line Parcel B

Height: No buildings shall exceed three and one-half (3-1/2) stories or forty-five (45) feet in height, excluding any necessary roof top mechanical units, equipment, screening, or parapet walls.

D. Traffic access/circulation/sidewalks

Traffic circulation and access to the Property shall be allowed in the manner shown on the attached Preliminary Site Development Plan. All sidewalks shall be in accordance with the final development plans and the City of Norman's applicable standards and specifications.

E. Signage

All signage shall comply with the applicable requirements contained in the City of Norman Sign Code, Chapter 18, for the commercial uses, as amended from time to time.

F. Lighting

All new exterior lighting shall comply with the applicable provisions of the City of Norman's Commercial Outdoor Lighting Standards, as may be amended from time to time.

G. Parking

Parking for the Property shall be developed in general compliance with the parking layout shown on the Preliminary Site Development Plan. The Property shall comply with Norman's applicable parking ordinances, as amended from time to time.

H. Landscaping

The Property's landscaping shall be installed and maintained in order to meet or exceed the City of Norman's applicable landscaping requirements, as amended from time to time.

I. Open Space

Open space and green space areas are located throughout the Property, as shown on the Open Space Exhibit attached hereto as Exhibit D. A minimum of 10% of the Property shall be designated as Open Space.

J. Phasing

It is anticipated that the development of the Property will occur in multiple phases. It is expected that the initial phase of development will be Parcel A; however, the actual timing, sequence, and number of future phases will be determined by market demand and absorption rates.

K. Sanitation

Trash dumpster will be located as depicted on the Preliminary Site Development Plan or in locations as modified or approved by City sanitation services.

L. Exterior Materials

The exterior of the buildings may be constructed of brick, stone, synthetic stone, high impact quality stucco or EIFS, masonry, metal accents, and any combination thereof.

M. Drainage

A preliminary drainage report has been provided to City Staff. The development of the Property shall meet or exceed the applicable ordinances and standards of the City.

EXHIBIT A

Legal Description of the Property

Lot One (1), in Block One (1), of Historic Berry Farms Addition, to Norman, Cleveland County, Oklahoma, according to the recorded plat thereof.

EXHIBIT B
Preliminary Site Development Plan

[Attached]

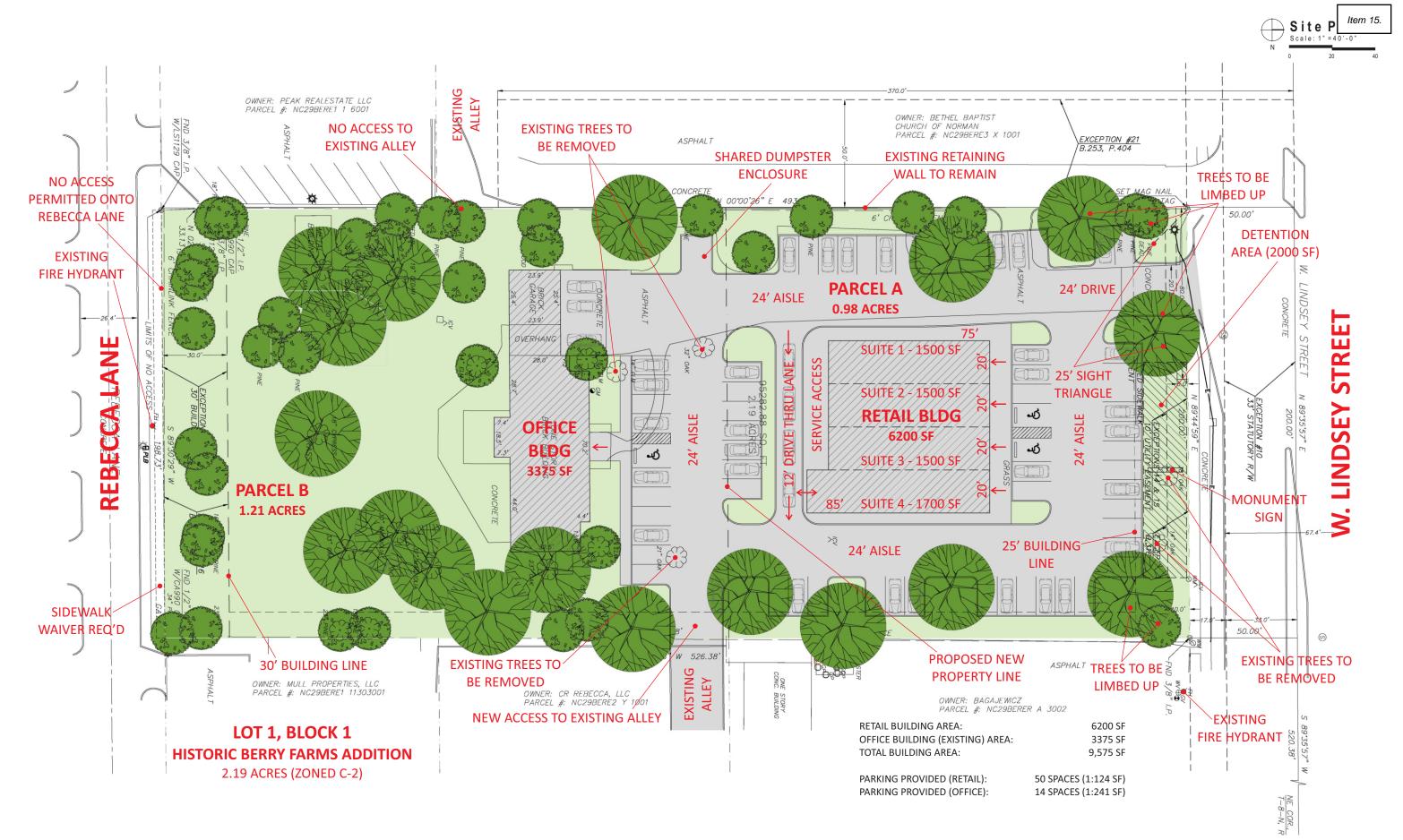


EXHIBIT C

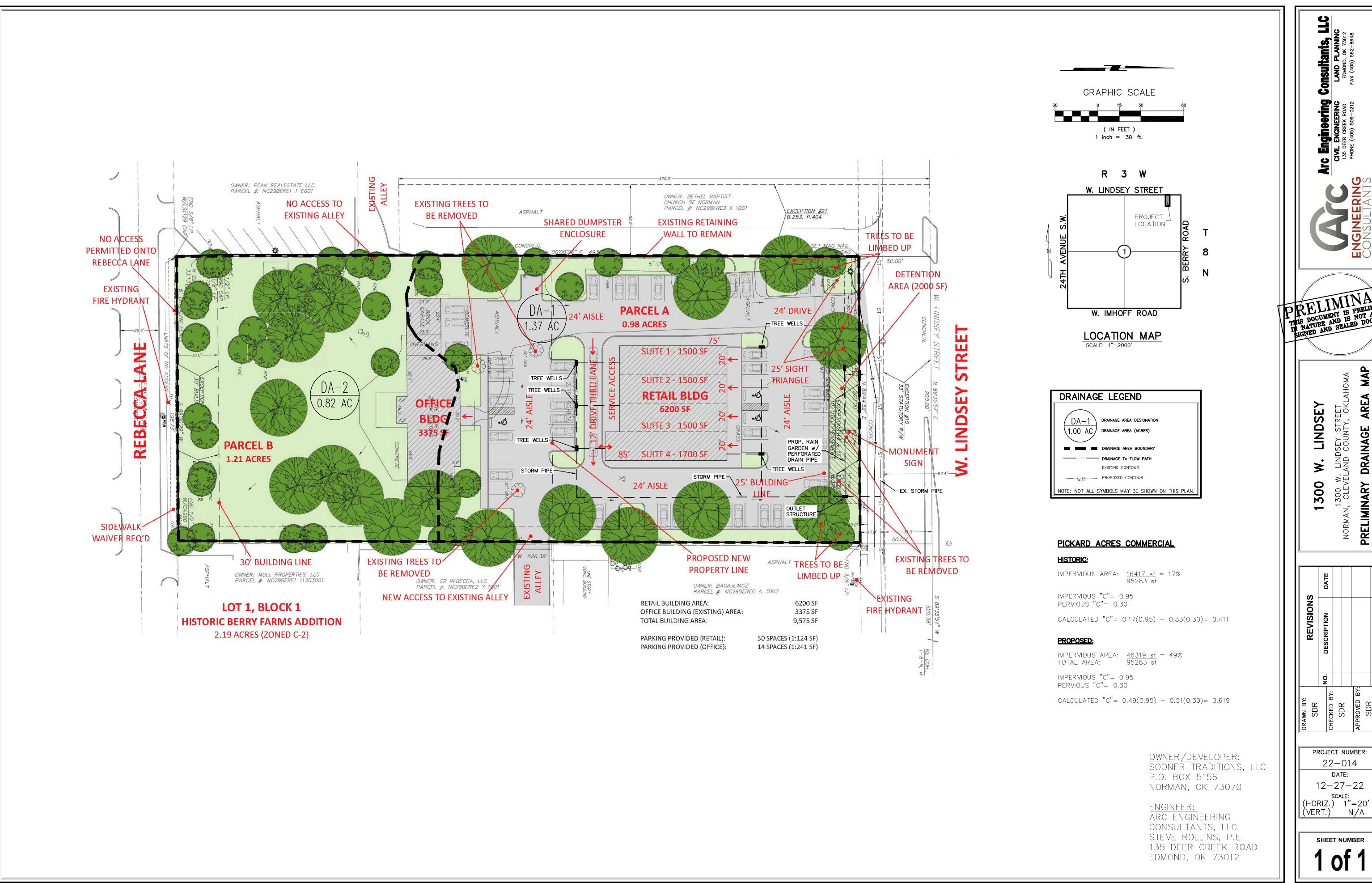
Allowable Uses

- Art Gallery/Studio.
- Assembly Halls of non-profit corporations.
- Libraries.
- Museums.
- Music Conservatories.
- Office buildings and office uses.
- Trade schools and schools for vocational training.
- Churches.
- Short-term rentals.
- Antique shop.
- Appliance Store.
- Artist materials supply, or studio.
- Automobile parking lots.
- Automobile supply store.
- Baby shop.
- Bakery/Baked Goods store.
- Bank.
- Barber shop, or beauty parlor.
- Book or stationery store.
- Camera shop.
- Candy store.
- Catering establishment.
- Child Care / Day Care establishment.
- Clothing or apparel store.
- Coffee house or coffee shop.
- Dairy products or ice cream store.
- Delicatessen store.
- Dress shop.
- Drug store or fountain.
- Dry Cleaning and Laundry Establishment.
- Dry goods store.
- Fabric or notion store.
- Florist/Flower Shop.
- Furniture Store.
- Gift Shop.
- Grocery or supermarket.
- Hardware store.
- Hotel or motel.

- Interior decorating store.
- Jewelry shop.
- Key shop.
- Leather Store and/or Leather Goods Store.
- Locksmith.
- Medical Marijuana Dispensary, as allowed by state law.
- Music, Radio, Electronics, Telephone, or Television Store.
- Painting and decorating shop.
- Pet shop/or Small Animal Hospital.
- Pharmacy.
- Photographer's studio.
- Restaurant/Bar/Lounge/Tavern
 - o may include live entertainment and/or a dance floor, (all such activity fully within an enclosed building) provided the kitchen remains open with full food service whenever live entertainment is offered.
- Retail Shops or Stores.
- Retail spirits store/Liquor store.
- Spa or Similar Establishment.
- Smoke, Tobacco, Vape, or Similar Shop.
- Self-service laundry.
- Sewing machine sales.
- Sporting goods sales.
- Shoe store or repair shop.
- Sign Store/Printing Store.
- T-Shirt Printing or Similar Sales or Services.
- Tanning Spa or Tanning Establishment.
- Tailor shop.
- Theater (excluding drive-in theaters), Bowling Alley, and Arcade, including those that sell alcoholic beverages in compliance with state law.
- Tier I Medical Marijuana Processor, as allowed by state law.
- Tier II Medical Marijuana Processor, as allowed by state law.
- Toy store.

EXHIBIT D
Preliminary Open Space Plan

[Attached]



1300 W. LINDSEY

PRELIMINARY

Planning Commission Agenda January 12, 2023

ORDINANCE NO. O-2223-22

ITEM NO. 4

STAFF REPORT

GENERAL INFORMATION

APPLICANT Sooner Traditions Realty, L.L.C.

REQUESTED ACTION Rezoning to SPUD, Simple Planned Unit

Development

EXISTING ZONING CO, Suburban Office Commercial District

and R-3, Multi-Family Dwelling District

SURROUNDING ZONING North: C-2, General Commercial District

East: C-1, Local Commercial District,

and C-2, General Commercial

District

South: R-3, Multi-Family Dwelling District,

and R-2, Two Family Dwelling

District

West: C-2, General Commercial District

LOCATION 1300 W. Lindsey Street

WARD Ward 2

CORE AREA No

AREA/SF 2.19 acres, more or less

PURPOSE Commercial and Office development

EXISTING LAND USE Office

SURROUNDING LAND USE North: Commercial

East: Commercial and multi-family

residential

South: Two-family residential

West: Church and multi-family residential

LAND USE PLAN DESIGNATION Commercial and High Density Residential

PROPOSE LAND USE DESIGNATION Commercial

PROJECT OVERVIEW: The applicant, Sooner Traditions Realty, L.L.C., is requesting a rezoning from CO, Suburban Office Commercial District, and R-3, Multi-Family Dwelling District, to SPUD, Simple Planned Unit Development, for approximately 2.19 acres at 1300 W. Lindsey St. The northern portion of the subject property was zoned CO, Suburban Office Commercial District, with Ordinance No. O-0102-48 and the southern portion was zoned R-3, Multi-Family Dwelling District, with Ordinance No. O-1951.

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Contribute to the revitalization and/or redevelopment of areas where decline of any type has occurred. Promote infill development that is compatible and harmonious with adjacent uses and would otherwise not be an area that could physically be redeveloped under conventional zoning.

Item 15.

Maintain consistency with the City's Zoning Ordinance, and other applicable plans, p standards and regulations on record.

Approval of a zone change to a SPUD adopts the Master Plan prepared by the applicant and reviewed as a part of the application. The SPUD establishes new and specific requirements for the amount and type of land use, residential densities, if appropriate, development regulations and location of specific elements of the development, such as open space and screening.

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USE: This SPUD proposes certain commercial and office uses for the property. Short-term rental is also in the proposed uses. A complete list of proposed uses is included as Exhibit C in the SPUD Narrative.

OPEN SPACE: A large portion of Parcel B (as shown on the site plan) will be preserved as open space. There are no buildings proposed south of the existing office building. A total of 1.12 acres, or 51% of the site, is proposed as open space for the development.

PARKING: The SPUD Narrative states the parking will meet the City's parking ordinances. There are no minimum requirements for parking spaces at this time. The applicant is proposing parking as demonstrated on the Site Development Plan, which shows spaces along the west, north, and east property lines of Parcel A and interior spaces near the buildings.

PHASES: It is anticipated Parcel A will be developed first; however, this will depend on market demand and absorption rates.

SITE PLAN/ACCESS: There are two proposed access points for this development. There is one existing access point off W. Lindsey St. The applicant proposes to extend the existing alley that is on the eastern side of the property, which will become the second access point. The existing office building on Parcel B will remain. A new multi-tenant building with a drive-thru lane on the south side is proposed on Parcel A.

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LANDSCAPING: The Site Development Plan shows which existing trees will remain. These trees will be limbed up. The SPUD Narrative says the development will meet or exceed the City's landscaping requirements.

SIGNAGE: The development will meet the commercial sign requirements in Chapter 18, Sign Regulations.

Item 15.

LIGHTING: The exterior lighting for the proposed development will meet the requirement the City's Commercial Outdoor Lighting Standards. This will require full cut-off lighting.

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ALTERNATIVES/ISSUES:

IMPACTS: The proposed SPUD would allow for more intense uses than the current zoning; however, the surrounding properties on W. Lindsey St. are commercial districts allowing for similar uses. The proposed site plan does not allow for access on Rebecca Ln., which has mostly residential uses. This development would not cause higher traffic in the neighborhood to the south. The existing green space between the existing office building and Rebecca Ln. will be preserved.

OTHER AGENCY COMMENTS:

BOARD OF PARKS COMMISSIONERS: N/A for this item.

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PUBLIC WORKS/ENGINEERING: A drainage report has been submitted by the applicant. Detention is being provided for the development.

TRAFFIC ENGINEER: Because the existing access point off W. Lindsey St. is not changing, no traffic study is required for this development.

FIRE DEPARTMENT: No comments from the Fire Department.

CONCLUSION: Staff forwards this request for rezoning from CO, Suburban Office Commercial District, and R-3, Multi-Family Dwelling District, to SPUD, Simple Planned Unit Development, and Ordinance No. O-2223-22 to the Planning Commission for consideration and recommendation to City Council.





CITY OF NORMAN, OR PLANNING COMMISSION MEETING

Municipal Building, Council Chambers, 201 West Gray, Norman, OK 73069 Thursday, January 12, 2023 at 6:30 PM

MINUTES

The Planning Commission of the City of Norman, Cleveland County, State of Oklahoma, met in Regular Session in Council Chambers of the Norman Municipal Building, 201 West Gray Street, on the 12th day of January, 2023.

Notice and agenda of the meeting were posted at the Norman Municipal Building and online at https://norman-ok.municodemeetings.com at least twenty-four hours prior to the beginning of the meeting.

Chair Erica Bird called the meeting to order at 6:30 p.m.

ROLL CALL

PRESENT

Cameron Brewer
Kevan Parker
Liz McKown
Steven McDaniel
Erica Bird
Douglas McClure
Jim Griffith
Maria Kindel
Michael Jablonski

A quorum was present.

STAFF MEMBERS PRESENT

Jane Hudson, Director, Planning & Community Development Lora Hoggatt, Planning Services Manager Colton Wayman, Planner I Beth Muckala, Assistant City Attorney Todd McLellan, Development Engineer Roné Tromble, Recording Secretary Mitchell Richardson, Multimedia Supervisor

1. Election of Officers

Motion made by Steven McDaniel to nominate Erica Bird as Chair, Kevan Parker as Vice Chair, and Michael Jablonski as Secretary; seconded by Liz McKown.

Voting Yea: Brewer, Parker, McKown, McDaniel, Bird, McClure, Griffith, Kindel, Jablonski

NORMAN 2025/Simple Planned Unit Development

4. Consideration of Approval, Acceptance, Rejection, Amendment, and/or Postponement of Resolution No. R-2223-76: Sooner Traditions Realty, L.L.C. requests amendment of the NORMAN 2025 Land Use & Transportation Plan from Commercial Designation and High Density Residential Designation to Commercial Designation for approximately 2.19 acres of property located at 1300 W. Lindsey Street.

ITEMS SUBMITTED FOR THE RECORD:

- 1. NORMAN 2025 Map
- 2. Staff Report

and

5. Consideration of Approval, Acceptance, Rejection, Amendment, and/or Postponement of Ordinance No. O-2223-22: Sooner Traditions Realty, L.L.C. requests rezoning from CO, Suburban Office Commercial District, and R-3, Multi-Family Dwelling District, to SPUD, Simple Planned Unit Development, for approximately 2.19 acres of property located at 1300 W. Lindsey Street.

ITEMS SUBMITTED FOR THE RECORD:

- Location Map
- 2. Staff Report
- 3. 1300 W. Lindsey SPUD Narrative with Exhibits A-D

PRESENTATION BY STAFF: Mr. Wayman reviewed the staff report, a copy of which is filed with the minutes.

PRESENTATION BY THE APPLICANT: Sean Rieger, Rieger Law Group, representing the applicant, presented the project.

Mr. Griffith asked if the existing law office will be retained as a law office. Mr. Rieger responded that the structure will be retained, but the uses could change.

Mr. Griffith asked about the large green space and maintenance of it. Mr. Rieger responded.

Mr. Parker commented there may be a water line that runs through the area designated for storm water detention. Mr. Rieger responded.

Ms. McKown commended the applicant on keeping the mature trees and open space. Mr. Jablonski agreed.

Mr. Jablonski asked about how far a nearby cell tower is from the buildings. Mr. Rieger responded that he did not know, but he believes the ordinance discusses a 200' separation for residential uses.

Ms. Bird asked if the median on Lindsey is blocking the ability to make a left turn into the property. Mr. Rieger responded that Lindsey Street allows U-turns.

AUDIENCE PARTICIPATION:

Adam Ross, 3308 Winchester Circle, made comments regarding rezoning of R-3, pedestrian connectivity to Rebecca Lane, and a large mature tree.

Braelyn Polite, 240 E. Kerr, Midwest City, made comments.

DISCUSSION AND ACTION BY THE PLANNING COMMISSION:

Mr. Jablonski asked what would happen if there is a water line in the front of the property. Mr. Rieger responded.

Mr. Parker commented on rain gardens. Mr. Rieger responded.

Mr. Griffith asked if there is any way the mature tree near the rain gardens can be saved. Mr. Rieger said they will look at it.

Mr. Brewer commented he thinks this plan is in the spirit of the 2025 plan. This was a prime opportunity to have more creativity with the development, specifically with the orientation of the building on the site to address the sea of parking along Lindsey Street.

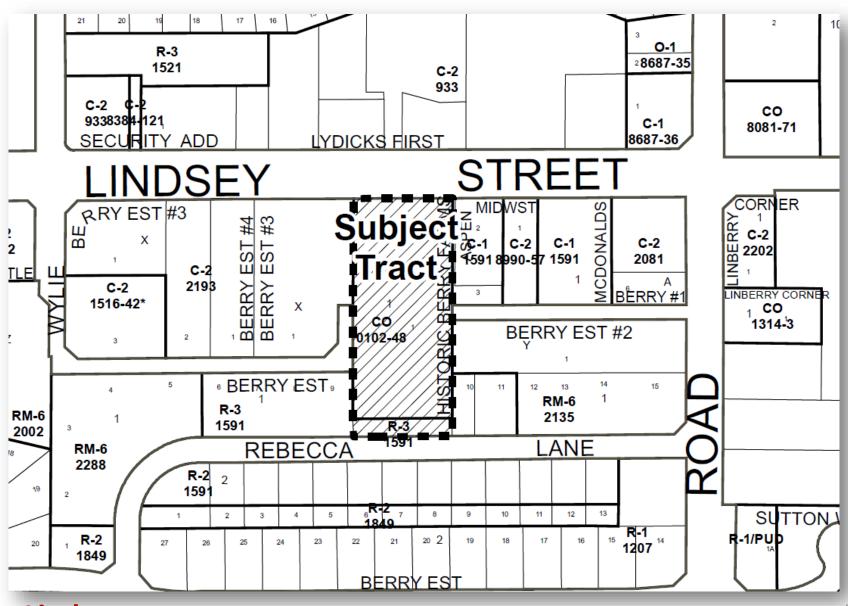
Mr. Jablonski asked if there is a way to stimulate the kind of development that the Commission thinks would be more productive in terms of beautifying the area.

Motion made by Kevan Parker to recommend approval of Resolution No. R-2223-76 and Ordinance No. O-2223-22 to City Council; seconded by Steven McDaniel.

Voting Yea: Brewer, Parker, McKown, McDaniel, Bird, McClure, Griffith, Kindel, Jablonski

The motion to recommend approval of Resolution R-2223-76 and Ordinance O-2223-22 to City Council passed by a vote of 9-0.

LOCATION MAP













LOCATION AERIAL

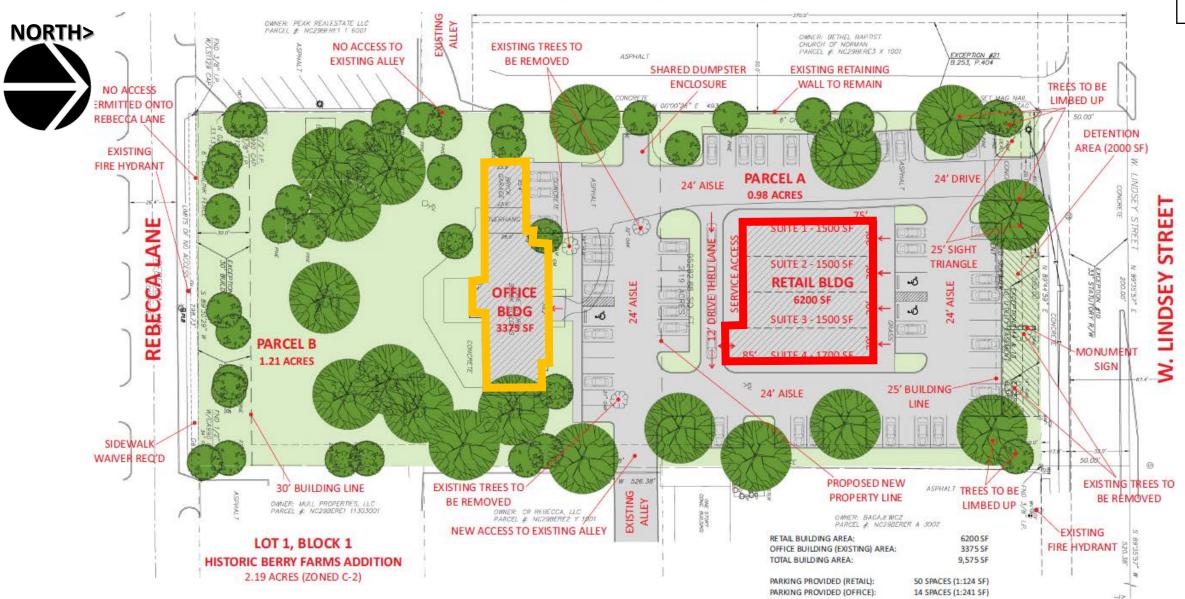
- 2.19 Acres
- Currently an office



























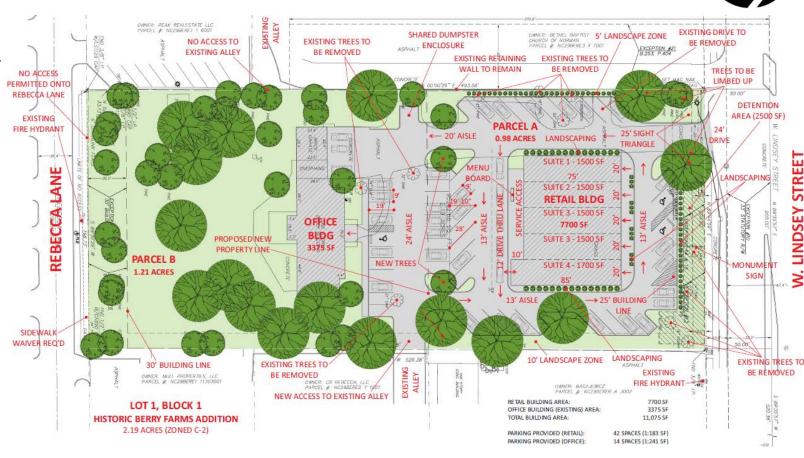


UPDATED SITE PLAN & SPUD



Changes Made Since Planning Commission:

- Building Shifted Closer to Lindsey Street.
- Reduced Parking / Angled Parking
- SPUD Revisions
 - Added Tree Preservation Language
 - Added Commitment to Signage and/or Striping to Encourage Right In, Right Out Access on Lindsey St.

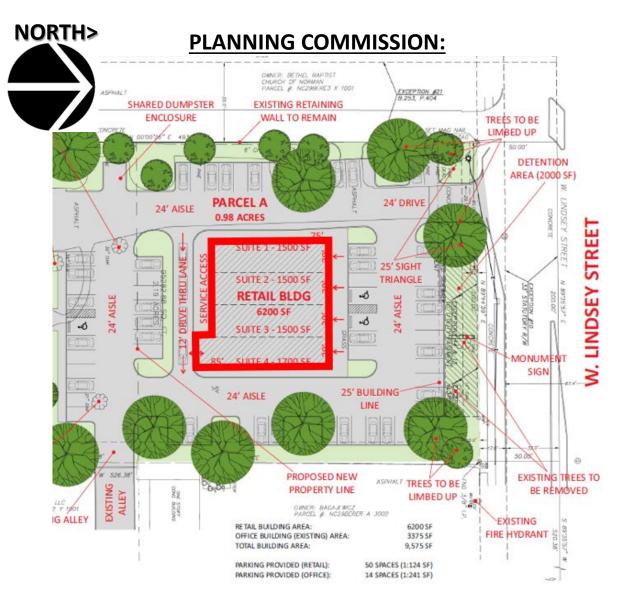




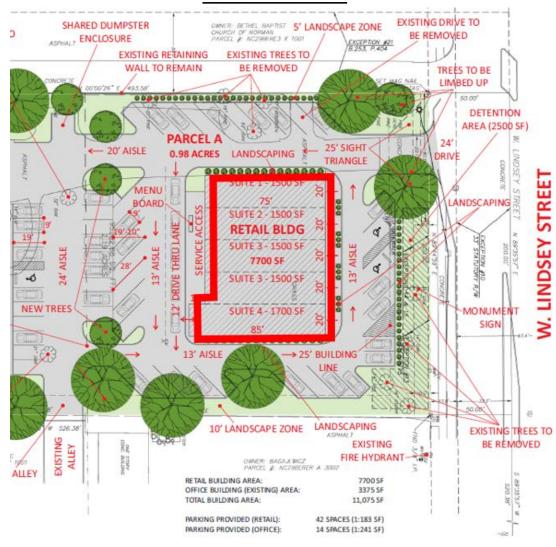








CITY COUNCIL:





1300 West Lindsey





SITE PLAN IN CONTEXT











NO CHANGE IN SOUTHERN AREA OF SITE

Existing Office Building remains in place, as does southern yard.







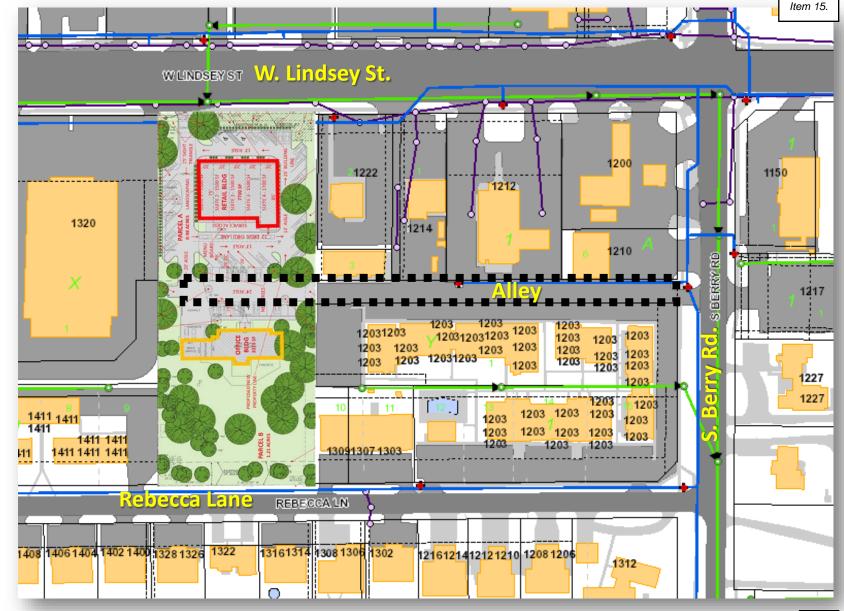




TRAFFIC – USES ALLEY CONNECTION

STAFF:

- "Because the existing access point on W. Lindsey St. is not changing, no traffic study is required."
- "There is no proposed access point on Rebecca Ln. so the development will not direct any commercial traffic into the neighborhood.."











STORM WATER DRAINAGE

-0

NEW TREES

390

BE REMOVED

SULTE 3 - 1500 SF

7700 SF

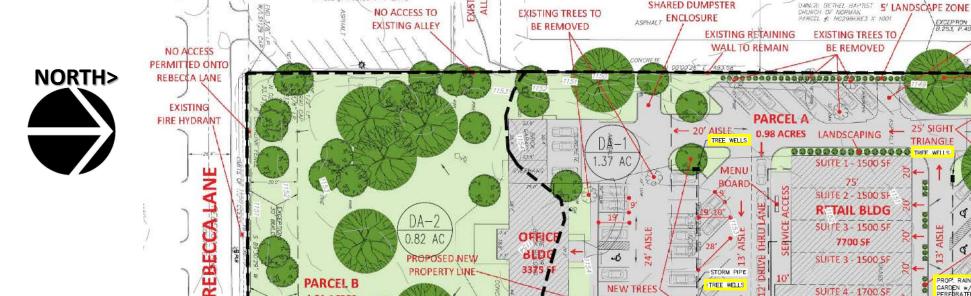
SUITE 3 - 1500 SF

SUITE 4-1700 SF

10' LANDSCAPE ZONE

LANDSCAPING

EXISTING FIRE HYDRANT



0.82 AC

PARCEL B

1.21 ACRES

30' BUILDING LINE



TREES TO BE

LIMBED UP

AREA (2500 SF)

LANDSCAPING

MONUMENT

EXISTING TREES TO

BE REMOVED

LINDSEY

1.12 acres, or 51% Open Space

WAIVER REQ'D

Low Impact Development (LID) designs such as a bioretention pond or rain garden and tree wells.

NEW ACCESS TO EXISTING ALLEY

EXISTING TREES TO

Best management practices (BMP's) are designed to increase storm water filtration and increase the amount of absorption into the soil to recharge groundwater supplies; and reduce the volume of storm water released...



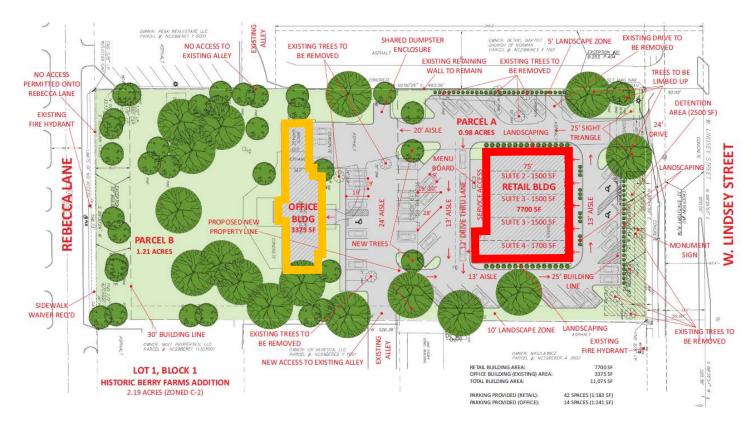
1300 West Lindsey





STAFF REPORT

- The [2017 STREETSCAPE] project was created to help spark redevelopment of W. Lindsey Street in this general area.
- Surrounding properties on W. Lindsey St. are commercial districts allowing for similar uses.



- Meets Commercial Outdoor Lighting Ordinance, full cut-off lighting
- Proposed site plan does not allow for access on Rebecca Ln.,
 - development would not cause higher traffic in the neighborhood to the south.
- Existing green space between the existing office building and Rebecca Ln. will be preserved.

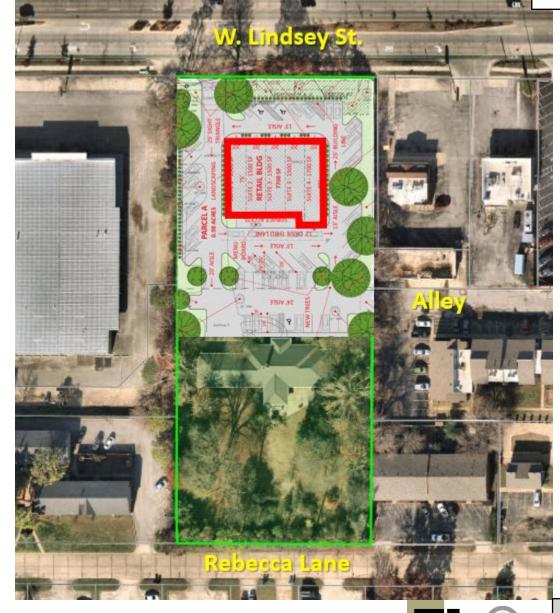








- **STAFF: "The [2017 STREETSCAPE] project was** created to help spark redevelopment of W. Lindsey Street in this general area."
- LID and BMP storm water improvements
- Full cut off lighting
- PRE-DEVELOPMENT:
 - questions as to access and drives
 - "A neighbor voiced his support for the development and thinks this will be a great addition..."
- **GREENBELT COMMISSION**: Approved without comment
- UNANIMOUS PLANNING COMMISSION APPROVAL
- **NO PROTESTS FILED**



SUPPLEMENTAL SLIDES

Item 15.



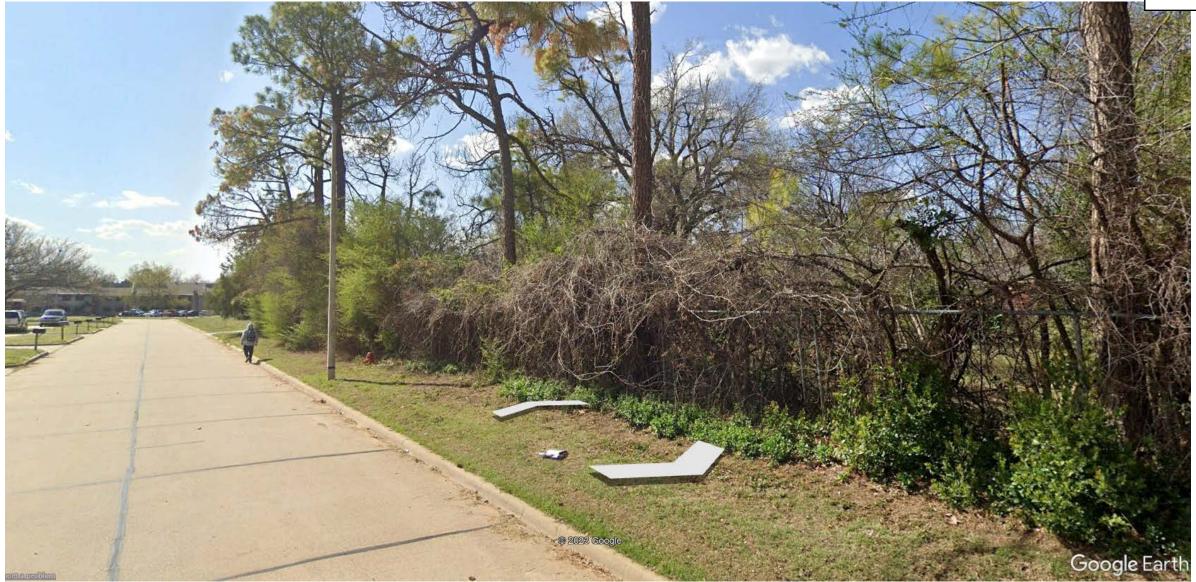






REBECCA LANE













TRAFFIC - PUD REVISION



D. Traffic access/circulation/sidewalks

Traffic circulation and access to the Property shall be allowed in the manner shown on the attached Preliminary Site Development Plan. All sidewalks shall be in accordance with the final development plans and the City of Norman's applicable standards and specifications. The Applicant will provide signage or lane striping at the curb cut along W. Lindsey St. to encourage right in, right out usage of said access point.





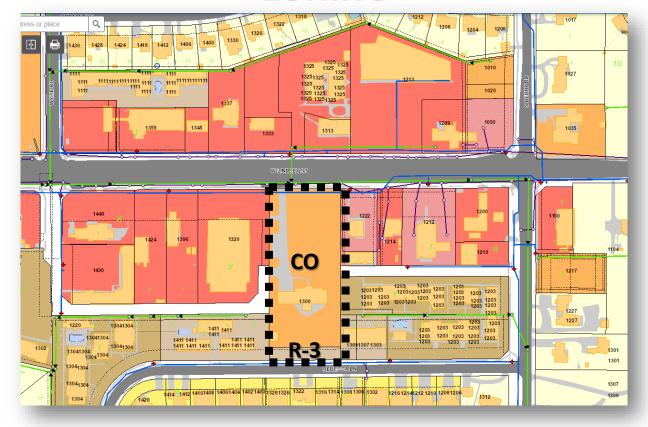








ZONING



Current Zoning: CO, Suburban Office Commercial; and

R-3, Multi Family Dwelling

Proposed: SPUD, Simple Planned Unit Development





1300 W. LINDSEY

SIMPLE PLANNED UNIT DEVELOPMENT

APPLICANT:

SOONER TRADITIONS REALTY, LLC

APPLICATION FOR:

SIMPLE PLANNED UNIT DEVELOPMENT NORMAN 2025 AMENDMENT

> NOVEMBER 28, 2022 REVISED FEBRUARY 28, 2023

PREPARED BY:

RIEGER LAW GROUP PLLC 136 Thompson Drive Norman, Oklahoma 73069

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I. INTRODUCTION

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II. PROPERTY DESCRIPTION/EXISTING PROPERTY CONDITIONS

- A. Location
- B. Existing Land Use and Zoning
- C. Elevation and Topography
- D. Utility Services
- E. Fire Protection Services
- F. Traffic Circulation and Access

III. DEVELOPMENT PLAN AND DESIGN CONCEPT

- A. Permitted Uses
- B. Development Criteria

EXHIBITS

- A. Legal Description
- B. Preliminary Site Development Plan
- C. Allowable Uses

I. <u>INTRODUCTION</u>

This Simple Planned Unit Development (the "SPUD") is being submitted for the property located at 1300 W. Lindsey Street, as more particularly described on **Exhibit A** (the "**Property**"). This SPUD seeks to facilitate a development featuring commercial, retail, and office buildings on the Property, in accordance with the development regulations contained in this SPUD. The Applicant will subsequently seek a short form plat bifurcating the Property into the two parcels shown on the attached Preliminary Site Development Plan. This SPUD will allow for development that is compatible with the surrounding uses, while maintaining substantial green space to the rear of the Property.

II. PROPERTY DESCRIPTIONS; EXISTING CONDITIONS

A. Location

The Property is located at 1300 W. Lindsey Street.

B. Existing Land Use and Zoning

The existing zoning is CO, Suburban Office Commercial and R-3, Multi-Family Dwelling District. The existing NORMAN 2025 Land Use Plan designation is Commercial and High Density Residential. The Applicant seeks to rezone the Property, pursuant to this SPUD, and amend the Property's NORMAN 2025 Land Use Plan designation to Commercial.

C. Elevation and Topography; Drainage

The Property is generally flat with little elevation change throughout. An existing office is located on the Property.

D. Utility Services

The necessary utility services for this project are already located on or near the Property.

E. Fire Protection Services

Fire protection services shall be provided in accordance with all applicable City of Norman regulations for such services.

F. Traffic Circulation and Access

Traffic circulation and access to the Property shall be allowed in the manner shown on the attached Preliminary Site Development Plan. As noted on the Preliminary Site Development Plan, no access will be permitted to Rebecca Lane.

III. <u>DEVELOPMENT PLAN AND DESIGN CONCEPT</u>

A. Uses Permitted

This SPUD will feature commercial, retail, and office uses. A complete list of allowable uses on the Property is attached as **Exhibit C**.

B. Site Plan

The Property shall be developed as depicted on the Preliminary Site Development Plan, attached hereto as **Exhibit B**, subject to final design development and the changes allowed by Section 22.420.05(11) of the City of Norman's SPUD Ordinance, as may be amended from time to time.

C. Area Regulations

Front Setback: All buildings shall be set back a minimum of twenty-five (25) feet from the northernmost property line of Parcel A and Parcel B.

Side Setback: There shall be a minimum five (5) feet building setback on both Parcel A and Parcel B measured from the easternmost and westernmost property lines.

Rear Setback: All buildings shall be set back a minimum of twenty (20) feet from the southernmost property line of Parcel A. All buildings shall be set back a minimum of thirty (30) feet from the southernmost property line Parcel B

Height: No buildings shall exceed three and one-half (3-1/2) stories or forty-five (45) feet in height, excluding any necessary roof top mechanical units, equipment, screening, or parapet walls.

D. Traffic access/circulation/sidewalks

Traffic circulation and access to the Property shall be allowed in the manner shown on the attached Preliminary Site Development Plan. All sidewalks shall be in accordance with the final development plans and the City of Norman's applicable standards and specifications. The Applicant will provide signage or lane striping at the curb cut along W. Lindsey St. to encourage right in, right out usage of said access point.

E. Signage

All signage shall comply with the applicable requirements contained in the City of Norman Sign Code, Chapter 18, for the commercial uses, as amended from time to time.

F. Lighting

All new exterior lighting shall comply with the applicable provisions of the City of Norman's Commercial Outdoor Lighting Standards, as may be amended from time to time.

G. Parking

Parking for the Property shall be developed in general compliance with the parking layout shown on the Preliminary Site Development Plan. The Property shall comply with Norman's applicable parking ordinances, as amended from time to time.

H. Landscaping/Tree Preservation

The Applicant shall endeavor in good faith to preserve the trees on the Property, to the extent commercially feasible, as shown on the Preliminary Site Development Plan. Except as shown on the Preliminary Site Development Plan, or as may prove to be commercially unfeasible to retain such mature tree, no mature trees will be removed by the Applicant unless one or more of the following circumstances apply: (i) a tree needs to be removed or altered in order to comply with Norman's City Ordinances, as amended from time to time; (ii) a tree(s) needs to be removed to allow for installation of new sidewalk or entry drive approaches, utility installation, bus stop changes, or other public or private infrastructure modifications; or (iii) a tree is a dangerous tree, diseased, or infected tree as defined in Article X of Chapter 10 of the City of Norman's Code of Ordinances, as amended from time to time. The Property's remaining landscaping shall be installed and maintained in order to meet or exceed the City of Norman's applicable landscaping requirements, as amended from time to time. Trees may be limbed up, trimmed up, or otherwise maintained from time to time in order to ensure desired visibility of the commercial spaces on the Property.

I. Open Space

Open space and green space areas are located throughout the Property, as shown on the Open Space Exhibit attached hereto as Exhibit D. A minimum of 10% of the Property shall be designated as Open Space.

J. Phasing

It is anticipated that the development of the Property will occur in multiple phases. It is expected that the initial phase of development will be Parcel A; however, the actual timing, sequence, and number of future phases will be determined by market demand and absorption rates.

K. Sanitation

Trash dumpster will be located as depicted on the Preliminary Site Development Plan or in locations as modified or approved by City sanitation services.

L. Exterior Materials

The exterior of the buildings may be constructed of brick, stone, synthetic stone, high impact quality stucco or EIFS, masonry, metal accents, and any combination thereof.

M. Drainage

A preliminary drainage report has been provided to City Staff. The development of the Property shall meet or exceed the applicable ordinances and standards of the City.

EXHIBIT A

Legal Description of the Property

Lot One (1), in Block One (1), of Historic Berry Farms Addition, to Norman, Cleveland County, Oklahoma, according to the recorded plat thereof.

EXHIBIT B
Preliminary Site Development Plan

[Attached]

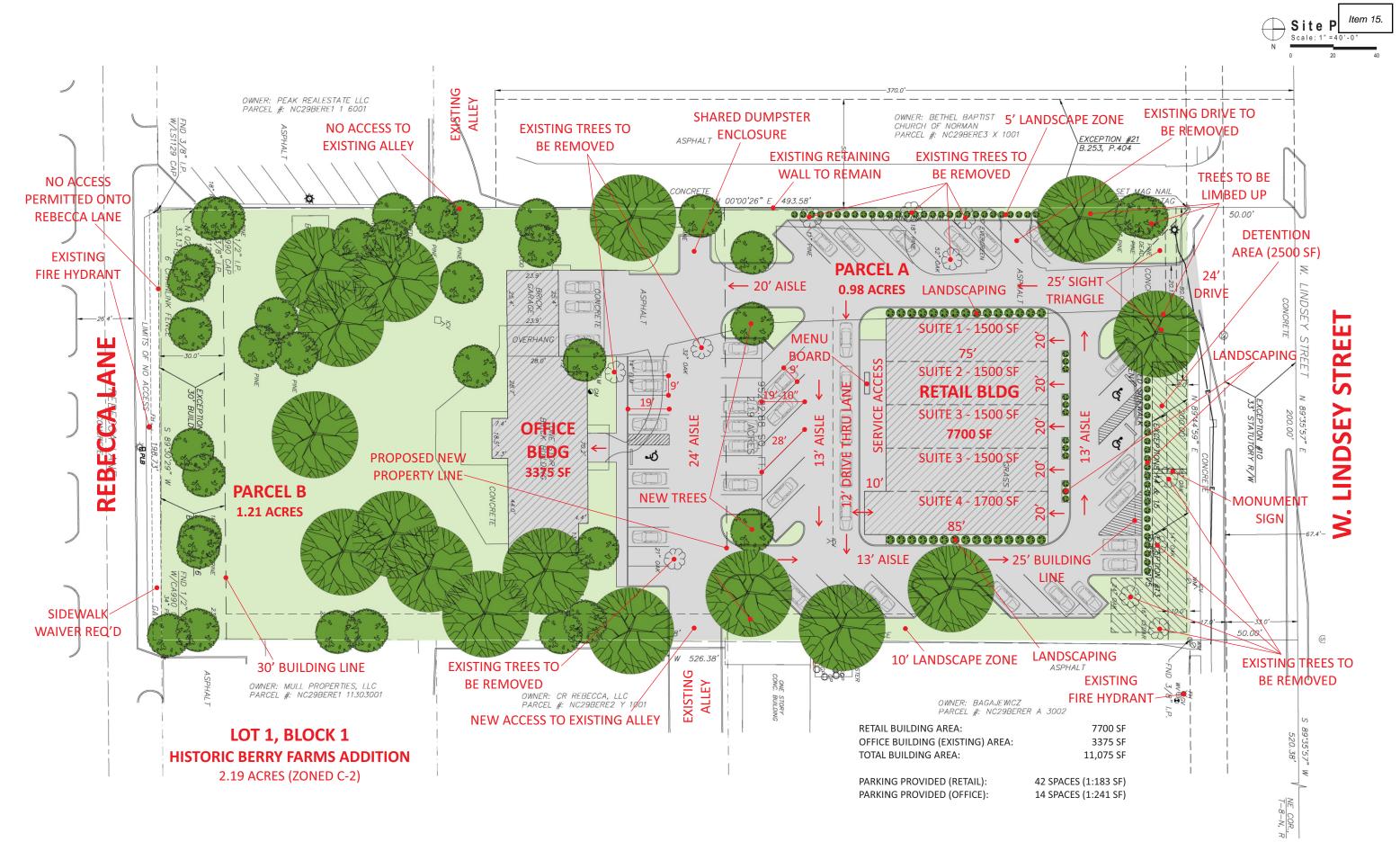


EXHIBIT C

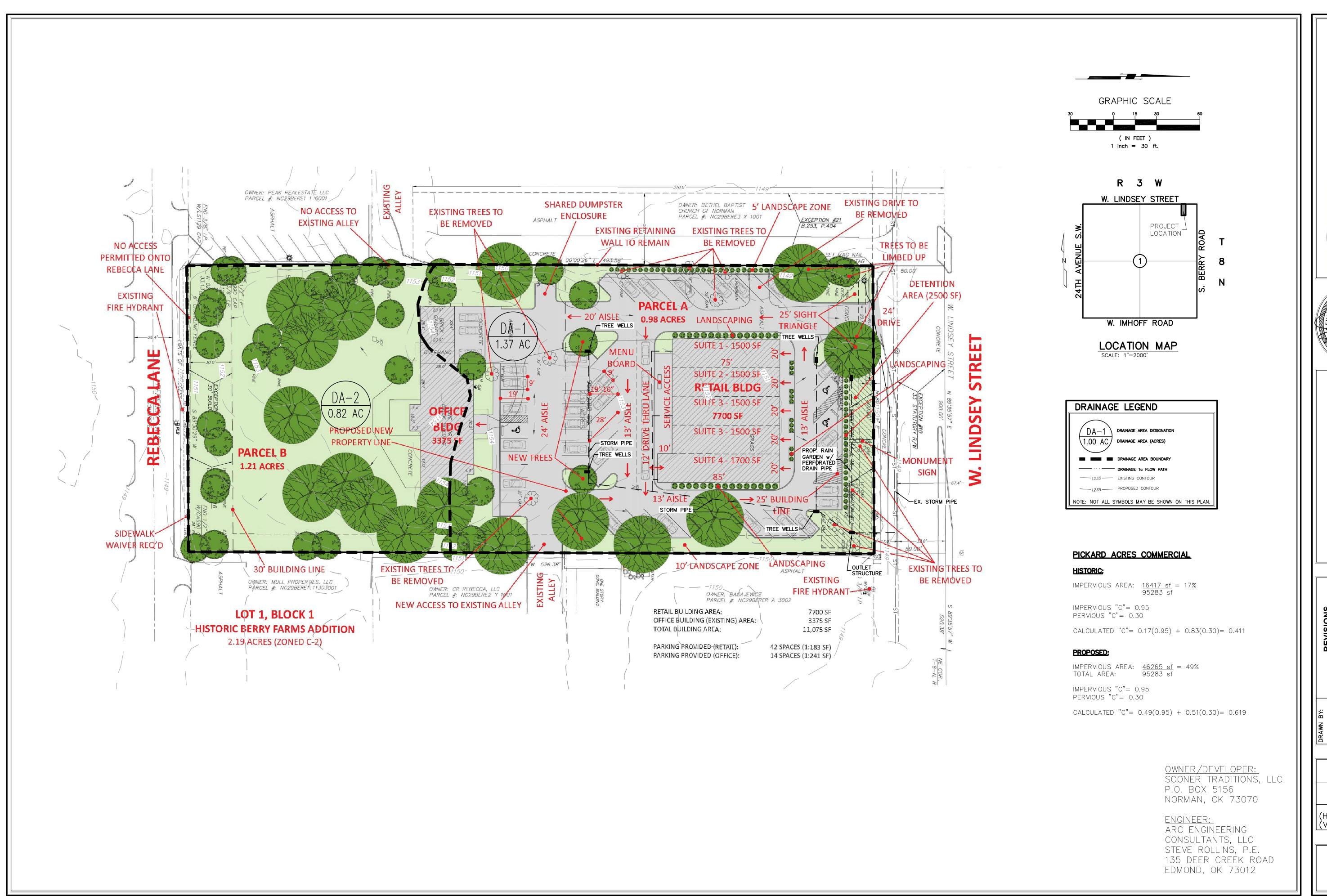
Allowable Uses

- Art Gallery/Studio.
- Assembly Halls of non-profit corporations.
- Libraries.
- Museums.
- Music Conservatories.
- Office buildings and office uses.
- Trade schools and schools for vocational training.
- Churches.
- Short-term rentals.
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- Pharmacy.
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- Restaurant/Bar/Lounge/Tavern
 - o may include live entertainment and/or a dance floor, (all such activity fully within an enclosed building) provided the kitchen remains open with full food service whenever live entertainment is offered.
- Retail Shops or Stores.
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- Spa or Similar Establishment.
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- Sewing machine sales.
- Sporting goods sales.
- Shoe store or repair shop.
- Sign Store/Printing Store.
- T-Shirt Printing or Similar Sales or Services.
- Tanning Spa or Tanning Establishment.
- Tailor shop.
- Theater (excluding drive-in theaters), Bowling Alley, and Arcade, including those that sell alcoholic beverages in compliance with state law.
- Tier I Medical Marijuana Processor, as allowed by state law.
- Tier II Medical Marijuana Processor, as allowed by state law.
- Toy store.

EXHIBIT D
Preliminary Open Space Plan

[Attached]



1300 W. LINDSEY

LINDSEY 1300 **PRELIMINARY** PROJECT NUMBER: 22 - 014DATE: 02-28-23 (HORIZ.) 1"=20" (VERT.) N/A SHEET NUMBER

1300 W. LINDSEY

SIMPLE PLANNED UNIT DEVELOPMENT

APPLICANT:

SOONER TRADITIONS REALTY, LLC

APPLICATION FOR:

SIMPLE PLANNED UNIT DEVELOPMENT NORMAN 2025 AMENDMENT

> NOVEMBER 28, 2022 REVISED FEBRUARY 28, 2023

PREPARED BY:

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EXHIBIT BPreliminary Site Development Plan

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- Libraries.
- Museums.
- Music Conservatories.
- Office buildings and office uses.
- Trade schools and schools for vocational training.
- Churches.
- Short-term rentals.
- Antique shop.
- Appliance Store.
- Artist materials supply, or studio.
- Automobile parking lots.
- Automobile supply store.
- Baby shop.
- Bakery/Baked Goods store.
- Bank.
- Barber shop, or beauty parlor.
- Book or stationery store.
- Camera shop.
- Candy store.
- Catering establishment.
- Child Care / Day Care establishment.
- Clothing or apparel store.
- Coffee house or coffee shop.
- Dairy products or ice cream store.
- Delicatessen store.
- Dress shop.
- Drug store or fountain.
- Dry Cleaning and Laundry Establishment.
- Dry goods store.
- Fabric or notion store.
- Florist/Flower Shop.
- Furniture Store.
- Gift Shop.
- Grocery or supermarket.
- Hardware store.
- Hotel or motel.

- Interior decorating store.
- Jewelry shop.
- Key shop.
- Leather Store and/or Leather Goods Store.
- Locksmith.
- Medical Marijuana Dispensary, as allowed by state law.
- Music, Radio, Electronics, Telephone, or Television Store.
- Painting and decorating shop.
- Pet shop/or Small Animal Hospital.
- Pharmacy.
- Photographer's studio.
- Restaurant/Bar/Lounge/Tavern
 - may include live entertainment and/or a dance floor, (all such activity fully within an enclosed building) provided the kitchen remains open with full food service whenever live entertainment is offered.
- Retail Shops or Stores.
- Retail spirits store/Liquor store.
- Spa or Similar Establishment.
- Smoke, Tobacco, Vape, or Similar Shop.
- Self-service laundry.
- Sewing machine sales.
- Sporting goods sales.
- Shoe store or repair shop.
- Sign Store/Printing Store.
- T-Shirt Printing or Similar Sales or Services.
- Tanning Spa or Tanning Establishment.
- Tailor shop.
- Theater (excluding drive-in theaters), Bowling Alley, and Arcade, including those that sell alcoholic beverages in compliance with state law.
- Tier I Medical Marijuana Processor, as allowed by state law.
- Tier II Medical Marijuana Processor, as allowed by state law.
- Toy store.

EXHIBIT D
Preliminary Open Space Plan

[Attached]

File Attachments for Item:

16. CONSIDERATION OF ADOPTION, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF RESOLUTION R-2223-98: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, GRANTING A PARTIAL EXEMPTION FROM CURRENT STANDARDS RELATING TO PROPOSED HISTORIC BERRY FARMS WITH ADVANCEMENT OF THE SHORT FORM PLAT PROCESS. (LOCATED AT 1300 WEST LINDSEY STREET)



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 2/14/2023

REQUESTER: Ken Danner, Subdivision Development Manager

PRESENTER: Shawn O'Leary, Director of Public Works

TITLE: CONSIDERATION OF ADOPTION, REJECTION, AMENDMENT, AND/OR

POSTPONEMENT OF RESOLUTION R-2223-98: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, GRANTING A PARTIAL EXEMPTION FROM CURRENT STANDARDS RELATING TO PROPOSED HISTORIC BERRY FARMS WITH ADVANCEMENT OF THE SHORT FORM PLAT PROCESS. (LOCATED AT 1300 WEST LINDSEY

STREET)

BACKGROUND:

The property is located at 1300 West Lindsey. City Council, on May 28, 2002 placed a portion of the property in the CO, Suburban Office Commercial with the adoption of Ordinance No. O-0102-48. During the rezoning, the residential property to the south requested that there be no access or connection to Rebecca Lane. The owners at that time honored the request. The property was platted as Historic Berry Farm Addition on March 17, 2003.

DISCUSSION:

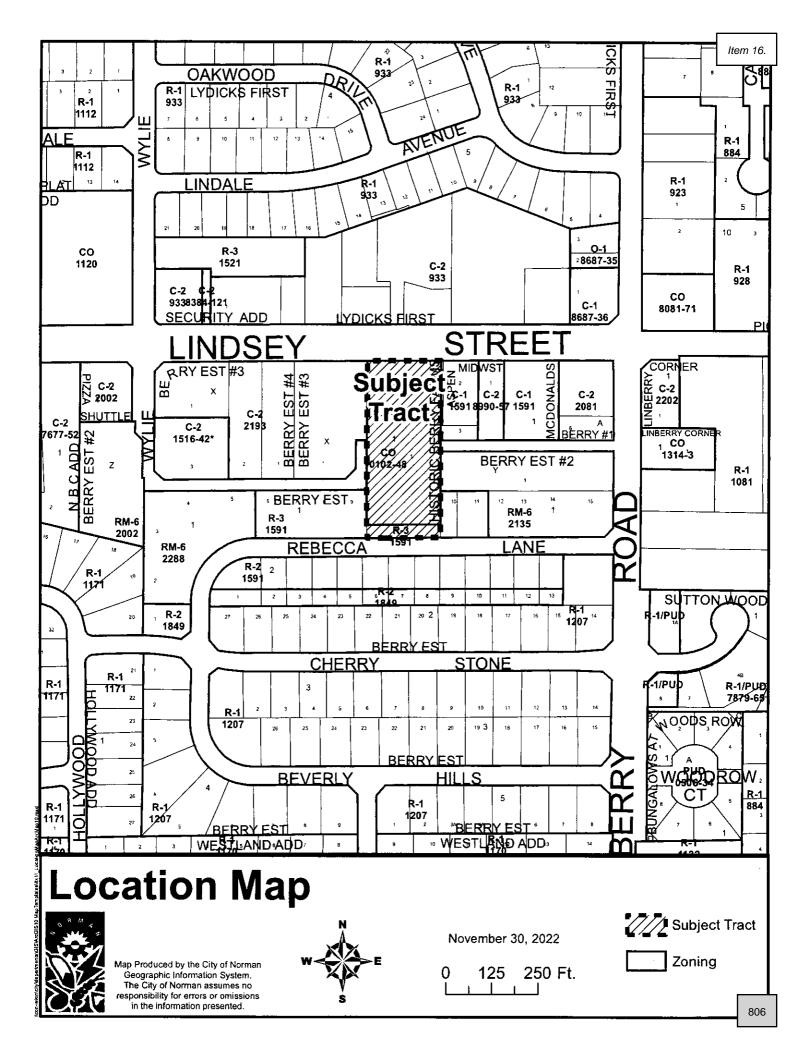
The owner is requesting the property be subdivided into two (2) lots. The only improvement required would be a sidewalk adjacent to Rebecca Lane. Berry Estates Addition was filed of record on May 25, 1966, prior to sidewalk requirements. The owner intends to honor the previous requirement of no access/connection to Rebecca Lane.

The owner, Sooner Traditions Reality, L.L.C. through their engineer, Mr. Steve Rollins, P.E. with Arc Engineering Consultants, requests a partial exemption from City of Norman Current Standards via Subdivision Regulation 19-604 so as to apply for a Short Form Plat to create two lots. Mr. Rollins's attached report dated January 10, 2023, speaks directly to the statement in 19-604 "...request shall be accompanied by a report from a Registered Professional Engineer licensed to practice in the State of Oklahoma. Such report shall contain a complete accounting of the infrastructure that had been previously accepted and its ability to service the lots that are proposed." To summarize Mr. Rollins's report concerning Current Infrastructure IE: a.) there are no sidewalks adjacent to or on either side of the property. Mr. Rollins's states "there will be no compromise to existing accepted public improvements" by creating two lots and "If granted, will not compromise the health, safety, or welfare of any current or future occupant or neighbor."

RECOMMENDATION:

It is recommended that City Council adopt the following option:

Approve Resolution R-2223-98 with the exemptions of public sidewalks adjacent to Rebecca Lane and subject to the submittal of a "Short Form Plat" for Historic Berry Farms Addition (proposed two commercial lots) as requested.



SURVEY OKLAHOMA 73069 STREET TITLE 1300 W. LINDSEY -AND NORMAN, ALTA/NSPS

ROAD E. SORCHUM MILL R EDMOND, OK 73034 PH:(405)821-5656 in prodemonation promper, on you design and 15, 223

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ATTACHMENT A NOTES CORRESPONDING TO SCHEDULE B ITEMS File Commitment Number 26,331/32-(2011 Effective Date May 12 2021 Feet American Talls transpage Company Som the second Mobiler right of may plong of tection from (0005 NOT MIZELE SUBJECT PROFEST. AND IS SHOWN HEREOMY. 72. Communi et fision at Founty ut Communit recorded in Book 87, page 256. IDDES WILL AFFECT SUBJECT INSPRIENTY AND IS NOT SHOULD INTERIOR. 17 Highs of May in hard of Oktobero steen County Figures Commission, recorded short Rit, page 162. WHITCH SUBJECT PROPERTY AND A REMARKS OF ANYTHING.

SURVEYOR'S CERTIFICATE

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GENERAL NOTES

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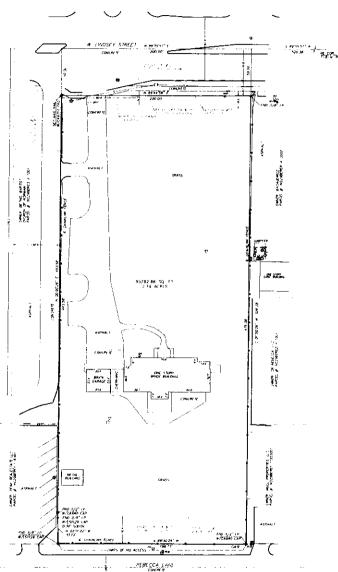
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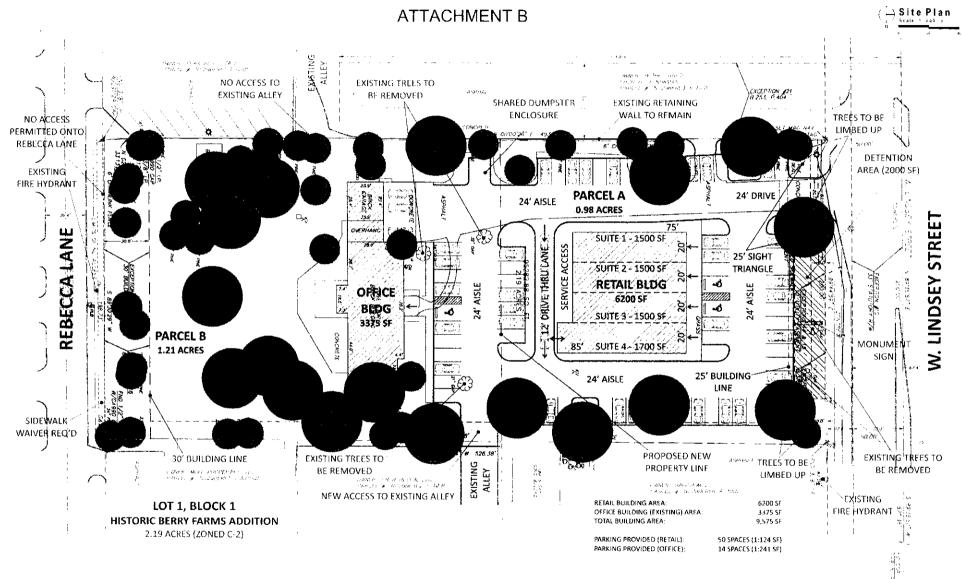
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UTILITY STATEMENT

CONTRACTION (1478), SHOWN LAW RETE LEGATO FROM INCL. SUPERIOR CONTRACTOR CONT





SOONER TRADITIONS



January 10, 2023

ATTN: Ms. Brenda Hall

City of Norman – City Clerk 201 West Gray

Norman, OK 73070

RE: Request for Partial Exemption from Current Standards 1300 W. Lindsey Street Norman, OK 73069 Lot 1, Block 1 of Historic Berry Farms Addition

Dear Ms. Hall,

This Letter Report has been developed and is submitted with a formal request for Partial Exemption from current subdivision standards associated with the above referenced property. A Letter Report is to accompany the formal request as stated in Section 19-604 of the City of Norman Code of Ordinances. The applicant will submit a Short Form Plat subject to City Council's approval of the exemption.

Letter Report

The subject property (2.19 acres) is currently included in the Historic Berry Farms Addition as indicated on the ALTA Survey provided in **ATTACHMENT A**. There is currently an existing office building located on the southern portion of the subject property. The office building is not currently occupied.

The owner of the subject property, Sooner Traditions Realty, LLC, seeks to split the parcel into two (2) separate lots in order to create a mixed-use development with commercial, retail and office uses. The tract is currently zoned CO Suburban Office Commercial District and R-3 Multi-Family Dwelling District, but is currently being rezoned SPUD to incorporate the commercial and retail uses on the north end of the property.

Access is provided to the property from West Lindsey Street to the north and also a public alley to the east. Bordering the property to the south is Rebecca Lane. The subject property will not take vehicular or pedestrian access from Rebecca Lane.

A public water line is located to the north along W. Lindsey Street and existing hydrants provide adequate fire protection coverage. A public sanitary sewer line is also located along the north side of the property and another line is located to the west of the property. Both of these lines adequately serve the property. The only public improvement needed relating to the subject property would be a sidewalk along Rebecca Lane. No other proposed public improvements are required. There are no proposed changes to the existing office building except to add additional private parking and drive isles. A Preliminary Site Plan is provided in ATTACHMENT B.



Sidewalks

Immediately south of the subject property along Rebecca Lane is Berry Estates. Berry Estates was filed of record on May 25, 1966, prior to sidewalk requirements. There are very few existing sidewalks in the area with no connections close to either side of the subject property and no existing sidewalks along the south side of Rebecca Lane.

Based on the above provided information and on behalf of the applicant, Arc Engineering specifically requests the granting of Partial Exemption from the current standards. This request is based on the lack of existing sidewalks in the area and no negative impacts to the surrounding community. Consistent with Section 19-604, this request of exemption, if granted, will not compromise the health, safety or welfare of any current or future occupant or neighbor. A Short Form Plat could then be submitted to the Planning Commission for approval.

On behalf of the applicant, we ask for approval of this request so that we may move to the next available agenda. If you have any questions or comments, please feel free to contact me at the number listed below.

Respectfully,

Steve Rollins, P.E.

Arc Engineering Consultants, L.L.C.

405-509-0212

srollins@arcengr.com





R-2223-98

A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, **OKLAHOMA GRANTING** Α PARTIAL EXEMPTION FROM CURRENT SUBDIVISION STANDARDS RELATING TO PROPOSED HISTORIC BERRY FARMS WITH ADVANCEMENT OF THE SHORT FORM PLAT PROCESS. (LOCATED AT 1300 WEST LINDSEY STREET)

- WHEREAS, Berry Estates Addition was filed of record on May 25, 1966, prior to sidewalk requirements; and
- WHEREAS, the property located at 1300 West Lindsey Street was platted as Historic Berry Farm Addition on March 17, 2003; and
- § WHEREAS, the owner, Sooner Traditions Reality, L.L.C., is requesting the property be subdivided into two (2) lots and the only required improvement would be a sidewalk adjacent to Rebecca Lane; and
- § WHEREAS, the property was rezoned on May 28, 2002, and during that time, the residential property to the south requested that there be no access or connection to Rebecca Lane; and
- § WHEREAS, the owner intends to honor the previous requirement of no access/connection to Rebecca Lane; and
- WHEREAS, No exemption shall be granted where the health, safety or welfare of any current or future occupant or neighbor will be compromised by absence of adequate water lines, alleys, fire hydrants, sewer lines, screening or drainage; and
- WHEREAS, the owner, through their engineer, Mr. Steve Rollins, P.E., Arc § 7. Engineering Consultants, requests a Partial Exemption from City of Norman Current Standards per Subdivision Regulation 19-604 pertaining to sidewalks so as to obtain a short form plat for the property in order to subdivide the into two lots; and

NOW, THEREFORE, BE IT RESOLVED BY THE COUNCIL OF THE CITY OF **NORMAN, OKLAHOMA:**

8. That City Council, having carefully considered all of the information above and the request for exemption, finds that the health, safety or welfare of any current or future occupant or neighbor will not be compromised by the absence of sidewalks.



e City Council therefore grants the exemption as requested.				
_ day of	_, 2023.			
Mayor				
	_ day of			

City Clerk

File Attachments for Item:

17. CONSIDERATION OF ADOPTION, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF RESOLUTION R-2223-102: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, GRANTING A PARTIAL EXEMPTION FROM CURRENT STANDARDS RELATING TO PROPOSED LOT 1, BLOCK 6, A REPLAT OF BLOCK 6, OAK RIDGE ADDITION, WITH ADVANCEMENT OF THE SHORT FORM PLAT PROCESS.



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 3/14/2023

REQUESTER: Ken Danner, Subdivision Development Manager

PRESENTER: Shawn O'Leary, Director of Public Works

TITLE: CONSIDERATION OF ADOPTION, REJECTION, AMENDMENT, AND/OR

POSTPONEMENT OF RESOLUTION R-2223-102: A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA, GRANTING A PARTIAL EXEMPTION FROM CURRENT STANDARDS RELATING TO PROPOSED LOT 1, BLOCK 6, A REPLAT OF BLOCK 6, OAK RIDGE ADDITION WITH ADVANCEMENT OF THE SHORT FORM PLAT

PROCESS.

BACKGROUND:

The property is located at 902 Hoover Street. City Council, on July 22, 1947, annexed this property into the Corporate City Limits with the adoption of Ordinance No. 716. The final plat of a Replat of Block 6 Oak Ridge Addition was filed of record with the Cleveland County Clerk on November 14, 1947. City Council, on July 13, 1954, placed this property in the R-1, Single-Family Dwelling District with the adoption of Ordinance No. 884. City Council, on December 14, 1954, vacated Flood Avenue right-of-way located on the east side of this property. As a result, thirty-feet (30') was added to Lot 1, Block 6, Oak Ridge Addition and thirty-feet (30') was added to the unplatted property to the east at that time.

DISCUSSION:

The owner is requesting the property be subdivided into two (2) lots. The improvements required would be curb and gutter paving and a sidewalk in connection with Hoover Street.

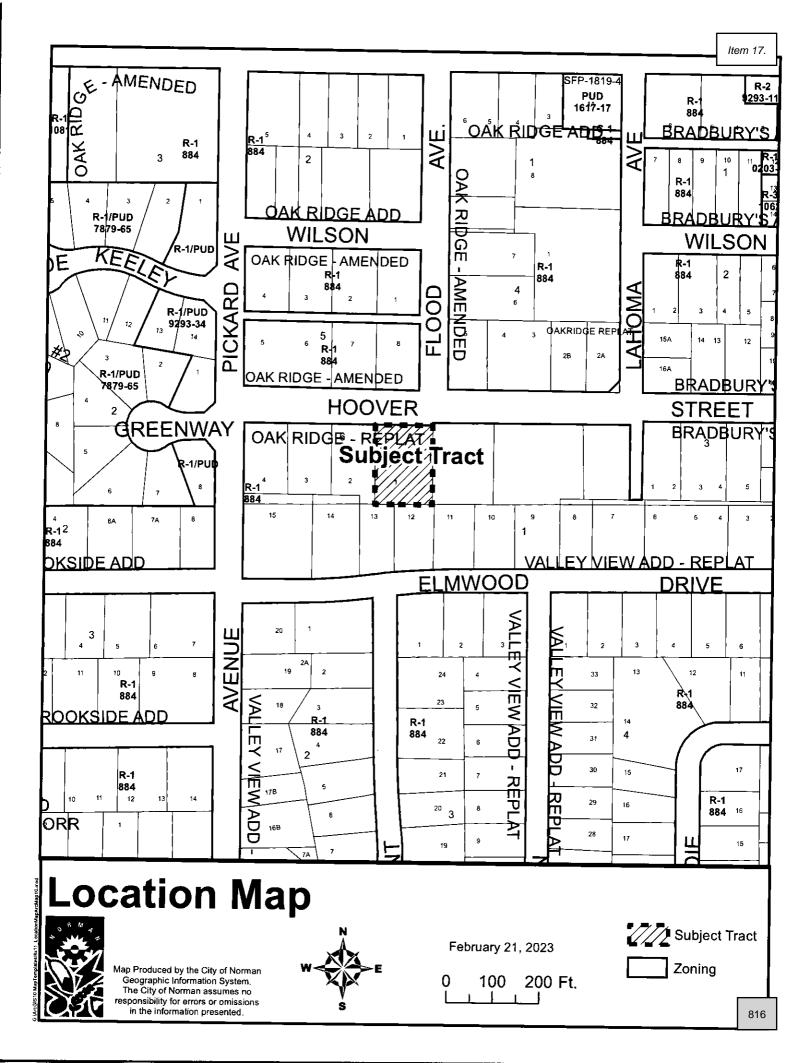
The owner, Ms. Elizabeth Bevel of Bevel, Gardner & Associates, Inc. through their engineer, Mr. Chris Anderson, SMC Consulting Engineers, P.C. requests a partial exemption from City of Norman Current Standards via Subdivision Regulation 19-604 so as to apply for a Short Form Plat to create two lots. Mr. Anderson's attached report dated January 6, 2023, speaks directly to the statement in 19-604 "...request shall be accompanied by a report from a Registered Professional Engineer licensed to practice in the State of Oklahoma. Such report shall contain a complete accounting of the infrastructure that had been previously accepted and its ability to service the lots that are proposed." To summarize Mr. Anderson's report concerning Current Infrastructure IE: a.) curb and gutter paving does not exist on either side of Hoover Street from Chautauqua Avenue to Pickard Avenue, b.) there are no sidewalks adjacent to or on either side of Hoover Street from Chautauqua Avenue to Pickard Avenue. c.) all public water and sanitary sewer improvements are available for the property. Mr. Anderson states "there will be no

compromise to existing accepted public improvements" by creating two lots and "If granted, will not compromise the health, safety, or welfare of any current or future occupant or neighbor."

RECOMMENDATION:

It is recommended that City Council adopt the following option:

1. Approve Resolution R-2223-102 with the exemptions of public curb and gutter paving and sidewalks in connection with Hoover Street and subject to the submittal of a "Short Form Plat" for A Replat of Block 6 Oak Ridge Addition (proposed two single-family residential lots) as requested.



SMC Your Civil Engineering Solution

Consulting Engineers, P.C. 815 West Main Oklahoma City, OK 73106 405-232-7715 FAX 405-232-7859 www.smcokc.com

Civil Engineering Land Development Storm Water Management

Terence L. Haynes Christopher D. Anderson Muhammad A. Khan January 18, 2023

Ms. Brenda Hall
City Clerk
City of Norman
P.O. Box 370
Norman, Oklahoma 73070

Re: 902 Hoover Street

Request for Exception/Exemption

Norman, Oklahoma SMC #6342.02

Dear Ms. Hall,

The owner of 902 Hoover Street, Ms. Elizabeth Bevel of Bevel, Gardner & Associates Inc., is proposing a Short Form Plat to divide the existing property at this location into two lots. The intent is to remove the existing structure at this location and construct two new single-family residences on the new lots. Per Sec. 19-604 of the City Code, she is requesting a partial exception from the procedural provisions requiring a preliminary and final plat. In addition, since the public infrastructure as required in Sec. 19-503 of the City Code has been previously constructed and accepted by the City, she is requesting a partial exemption from the current standards from the City Council. As required by Sec. 19-604, a companion Engineers Report has been prepared by a Registered Professional Engineer licensed to practice in the State of Oklahoma and is included with this request. The report contains a complete accounting of the infrastructure that has been previously accepted and its ability to service the additional lot that is proposed.

Sincerely,

SMC Consulting Engineers, P.C.

Christopher D. Anderson, P.E.

c.c. Elizabeth Bevel Ken Danner File

Engineers Report on Existing Infrastructure for 902 HOOVER STREET

Norman, Oklahoma



SMC Consulting Engineers, P.C. 815 West Main Oklahoma City, OK 73106 (405) 232-7715

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EXISTING SANITARY SEWER INFRASTRUCTURE	5
EXISTING STREET PAVEMENT AND DRAINAGE INFRASTRUCTURE	6
CONCLUSION	7
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EXHIBIT 5: SITE PHOTOS	

Engineers Report on Existing Infrastructure for

902 HOOVER STREET

Norman, Oklahoma

INTRODUCTION

The Client, Elizabeth Bevel of Bevel, Gardner & Associates Inc., is proposing a Short Form Plat to divide the existing property at 902 Hoover Street into two lots. The intent is to remove the existing structure at this location and construct two new single-family residences. Per Sec. 19-604 of the City Code, she is requesting a partial exception from the procedural provisions requiring a preliminary and final plat. In addition, since the public infrastructure as required in Sec. 19-503 of the City Code has been previously constructed and accepted by the City, she is requesting a partial exemption from the current standards from the City Council. As required by Sec. 19-604, this companion report has been prepared by a Registered Professional Engineer licensed to practice in the State of Oklahoma. This report contains a complete accounting of the infrastructure that has been previously accepted and its ability to service the additional lot that is proposed.

The property at 902 Hoover Street is also known in the Cleveland County Oklahoma Assessor's Office as "Oak Ridge Lot 1, Block 6 and 30' Vacated Street" (see attached Exhibit 1 – Existing Final Plat and Exhibit 4 - Cleveland County Assessor's Page). This property is located at the Southwest corner of the intersection of Hoover Street and Flood Avenue in a well-established neighborhood in South-Central Norman that was platted and constructed in the 1940's.

EXISTING WATERLINE INFRASTRUCTURE

The property at 902 Hoover Street is serviced by an existing 8" waterline located along the North side of Hoover Street (see attached Exhibit 2 - Utility Exhibit). This existing waterline is a part of a looped waterline system which connects with another existing 8" waterline on Flood Avenue and an existing 6" waterline on Pickard Avenue. There is an existing fire hydrant located across from the property at the Northwest corner of the intersection of Hoover Street and Flood Avenue. There is another existing fire hydrant located west of the property at the Northeast corner of the intersection of Hoover Street and Pickard Avenue. The property is served by a single water service connection and the new lot will require a new single water service connection.

EXISTING SANITARY SEWER INFRASTRUCTURE

The property at 902 Hoover Street is served by an existing 8" sanitary sewer line located adjacent to the South property line in an existing utility easement (see attached Exhibit 2 – Utility Exhibit). The property is served by a single sewer service connection and the new lot will require a new single sewer service connection.

EXISTING STREET PAVEMENT AND DRAINAGE INFRASTRUCTURE

The property at 902 Hoover Street is served by Hoover Street which is an existing asphalt street without curbs and gutters (see attached Exhibit 5 – Site Photos). The pavement appears to be in good condition. The original design may have included bar ditches for drainage, but now they are just shallow depressions in the right-of-way adjacent to the pavement. There are no visible culverts under the driveways and the stormwater runoff appears to just run along the street and the shallow depressions adjacent to the paving. The shallow depressions are grassed and there does not appear to be any visible erosion or scouring caused by the stormwater runoff.

Stormwater runoff from approximately 1.50 acres drains onto Flood Avenue and then South towards the intersection with Hoover Street (see attached drainage map exhibit). Flood Avenue is an asphalt street with concrete curb and gutter. The curb and gutter ends at Hoover Street. From this intersection, the stormwater runoff turns and drains West along Hoover Street towards the intersection with Pickard Avenue. At this intersection, stormwater from an additional 1.87 acres has been added to the flow, for a total of 3.37 acres draining to this point. Pickard Avenue is an asphalt street with concrete curbs and gutters.

Again, there does not appear to be any visible erosion or scouring caused by the stormwater runoff and the existing drainage system appears to function adequately.

CONCLUSION

The property at 902 Hoover Street is located in a well-established neighborhood in South-Central Norman that was platted and constructed in the 1940's. The existing infrastructure in this neighborhood functions properly and there are no foreseeable improvements needed or planned in the neighborhood.

For the property at 902 Hoover Street, the public infrastructure as required by Sec. 19-503 of the City code has been previously constructed and accepted by the City of Norman. It appears to be functioning as intended and should have the ability to service the additional lot that is being proposed by the developer (with the exception of adding service connections for water and sewer).

Christopher D. Anderson, P.E.

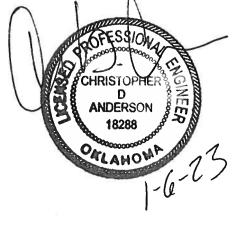


EXHIBIT 1

EXISTING FINAL PLAT

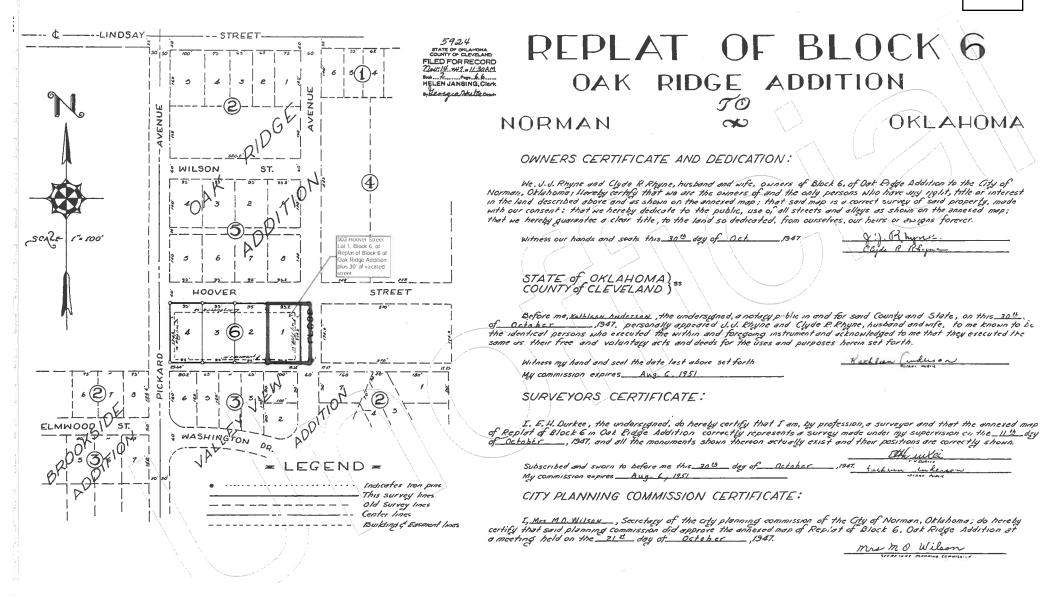


EXHIBIT 2

UTILITY EXHIBIT

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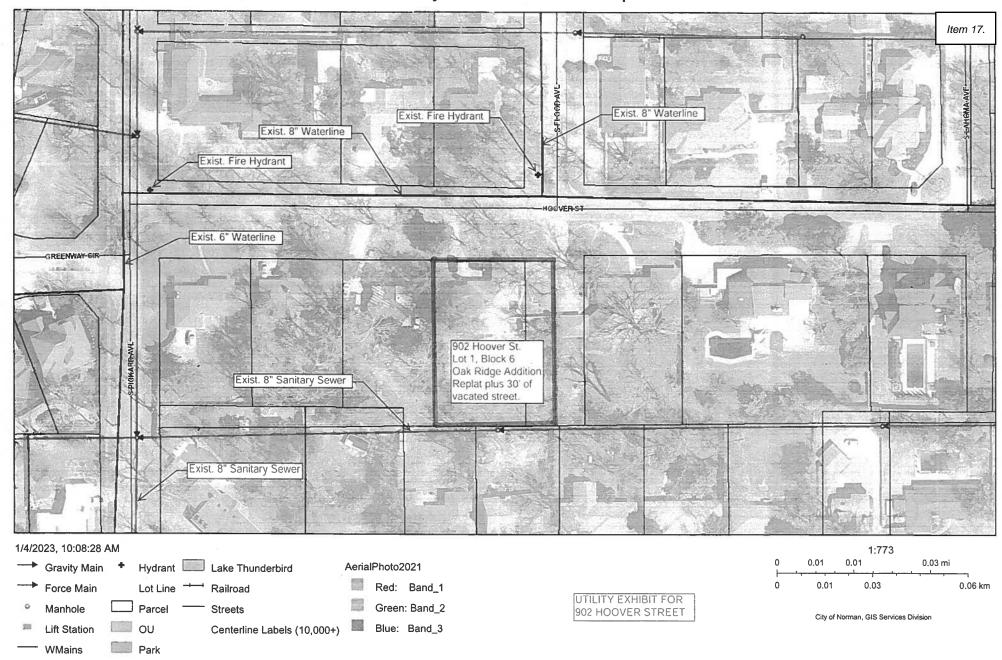


EXHIBIT 3

DRAINAGE MAP

City of Indiffiant vveniviap

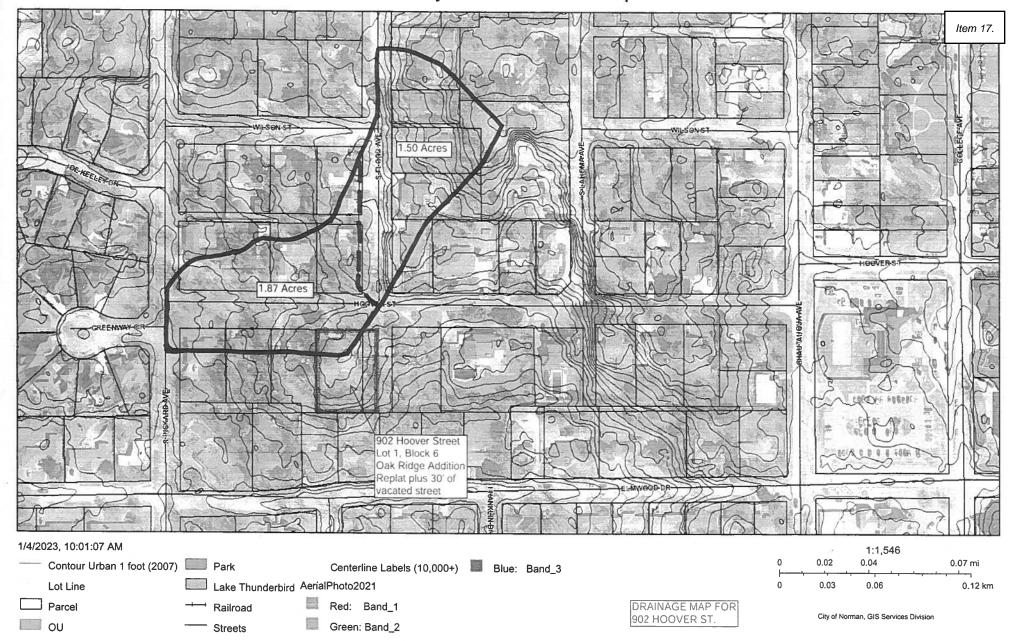


EXHIBIT 4

CLEVELAND COUNTY ASSESSOR'S PAGE





Cleveland County Oklahoma Assessor's Office

Cleveland County Oklahoma Assessor's Office

Account #: 40671 / Parcel ID: NC290AKRD 6

CURRENT BEVEL, VIRGIL T & ELIZABETH A 1007 S Pickard AVE Norman OK 73069-4528

Current Market Value \$194,623

KEY INFORMATION

902 HOOVER ST

Tax Year	2022				
Land Size	0.5000 Land Units AC				
Class	Urban Reside	School District	NORMAN CITY 29		
Section	6	Township	8		
Range	2W Neighborhood OAK RIDGE NC29				
Legal Description	OAK RIDGE LOT 1 BLK 6 AND 30' VACATED STREET				
Mailing Address	BEVEL, VIRGIL T & ELIZABETH A, 1007 S Pickard AVE, Norman, 73069-4528, 73069-4528				

ASSESSMENT DETAILS

Market Value	\$194,623
Taxable Value	\$194,623
Land Value	\$40,000
Gross Assessed Value	\$23,354
Adjustments	\$0
Net Assessed Value	\$23,354

RESIDENTIAL

RESIDENTIAL BUILDING (1)

Туре	0001	Description	Conventional 1 Story	Quality	Average Plus
Stories	1.0	Condition	Good	Year Built	1950
Interior	Drywall	Exterior Walls	Frame Siding	Full Baths	2
Additional Full Bath	0	Half Baths	0	Three Quarter Baths	0
Total Bathrooms	2.00	Roof Type	Hip	Bedrooms	3
Roof Cover	Comp Shingle	Foundation	Conventional Frame	Floor Cover	Allowance
Cooling	Central H/A		Total Finished Area	2,066	

SALES

SALE DATE	SALE PRICE	DEED BOOK	DEED PAGE	GRANTOR	GRANTEE	DEED TYPE
07/26/2022	\$415,000	6455	119	HARTSOCK JOINT REV TRT	BEVEL, VIRGIL T & ELIZABETH A	WD
12/30/2010	\$0	4833	869	HARTSOCK, MARY ALPHA-REV TRT	HARTSOCK JOINT REV TRT	WDN

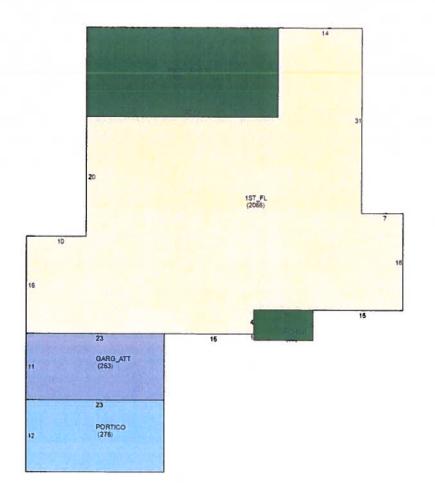
LAND

UNIT CODE	DESCRIPTION	USE CODE	ACRES / LOTS	USE VALUE
SF	Square Feet	Residential	21780.00	\$26,136





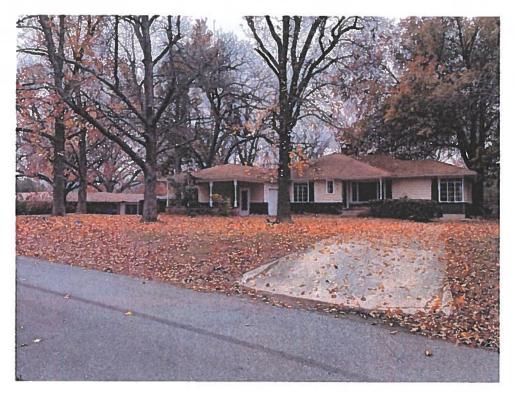
Item 17.



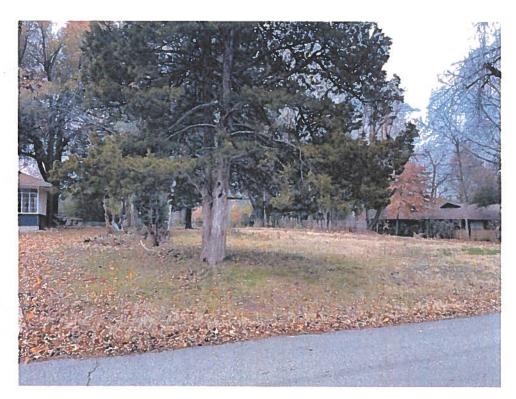
Data last updated: 01/04/2023

EXHIBIT 5

SITE PHOTOGRAPHS



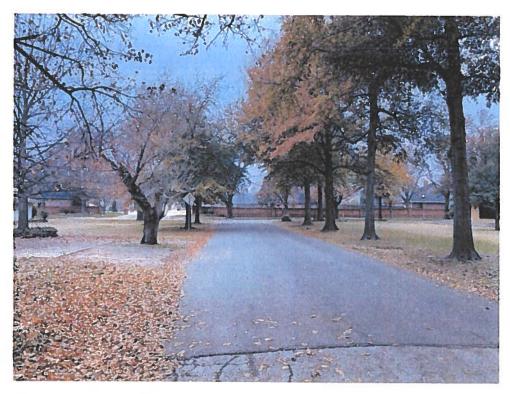
(Fig. 1) Standing on Hoover Street looking Southeast at 902 Hoover



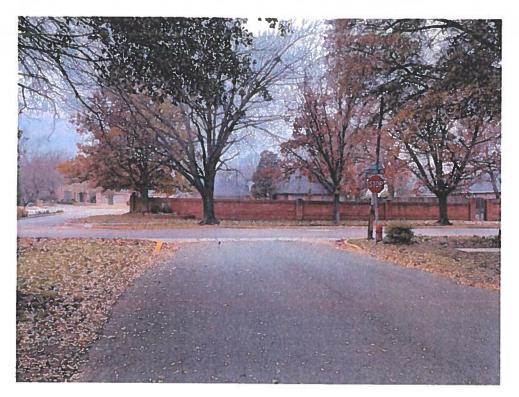
(Fig. 2) Standing on Hoover Street looking Southwest at 902 Hoover



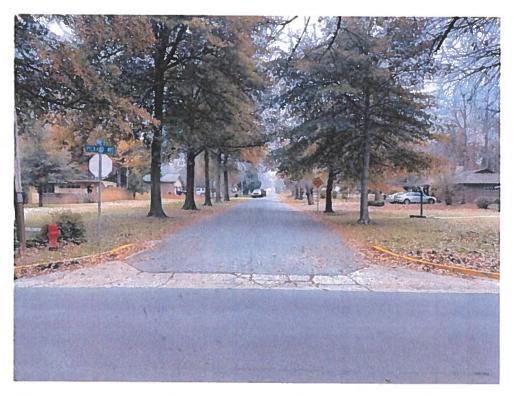
(Fig 3.) Standing in front of 902 Hoover looking West along Hoover Street



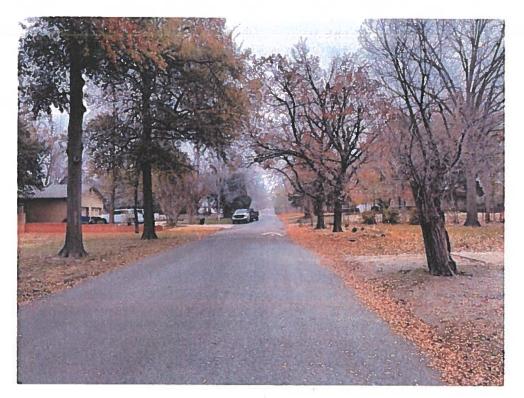
(Fig. 4) Standing West of 902 Hoover and looking West along Hoover Street



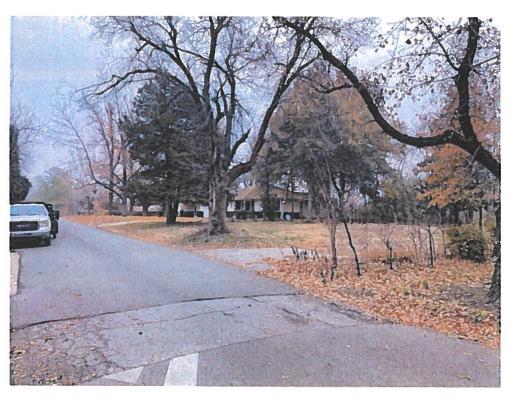
(Fig. 5) Standing on Hoover Street looking West towards the intersection with Pickard Street



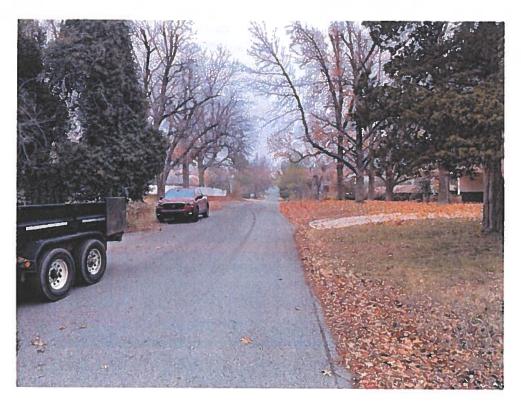
(Fig 6) Standing at the intersection of Picard Street and Hoover Street and looking East along Hoover Street



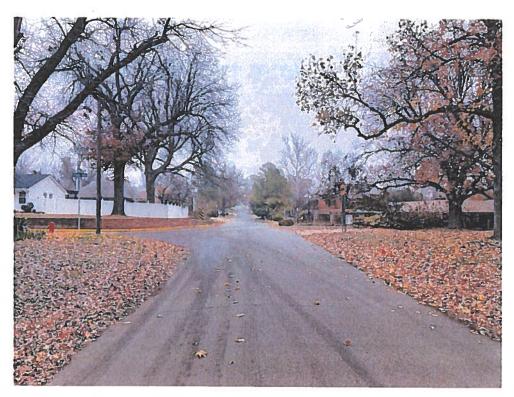
(Fig. 7) Standing on Hoover Street and looking East along Hoover Street towards 902 Hoover



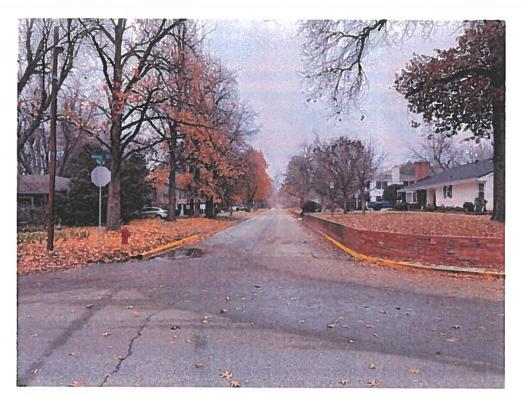
(Fig. 8) Standing on Hoover Street and looking Southeast along Hoover Street towards 902 Hoover



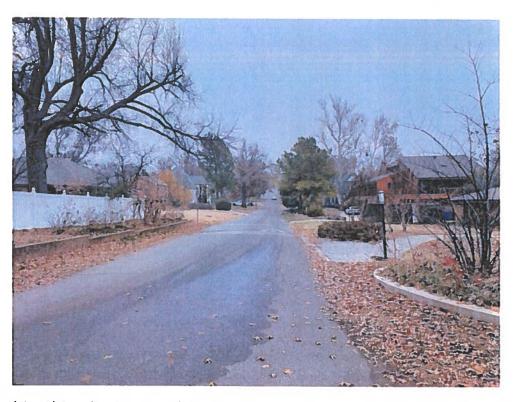
(Fig 9.) Standing on Hoover Street looking East along Hoover Street towards 902 Hoover



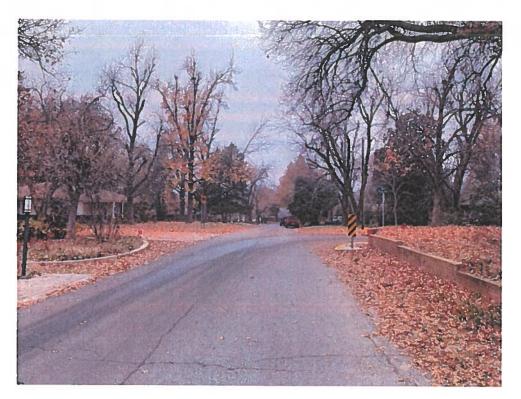
(Fig. 10) Standing in front of 902 Hoover and looking East along Hoover Street towards the intersection with Flood Avenue



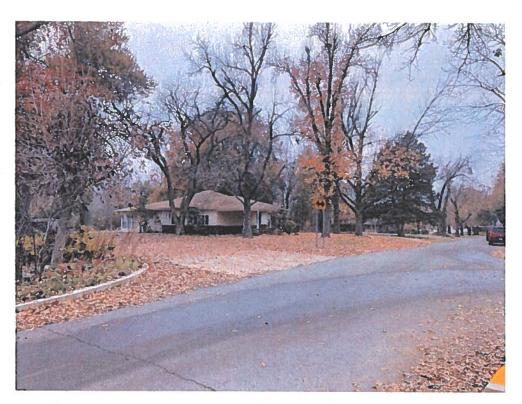
(Fig. 11) Standing at the intersection of Flood Avenue and Hoover Street and looking North along Flood Avenue



(Fig 12) Standing just East of the intersection of Flood Avenue and Hoover Street and looking East along Hoover Street



(Fig. 13) Standing East of the intersection of Flood Avenue and Hoover Street and looking West along Hoover Street towards the intersection with Flood Avenue



(Fig. 14) Standing just East of the intersection of Flood Avenue and Hoover Street and looking towards 902 Hoover

Resolution

R-2223-102

A RESOLUTION OF THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA GRANTING A PARTIAL EXEMPTION FROM CURRENT SUBDIVISION STANDARDS RELATING TO PROPOSED LOT 1, BLOCK 6, A REPLAT OF BLOCK 6, OAK RIDGE ADDITION WITH ADVANCEMENT OF THE SHORT FORM PLAT PROCESS. (LOCATED AT 902 HOOVER STREET)

- § 1. WHEREAS, the property at 902 Hoover Street was annexed into the Corporate City Limits with the adoption of Ordinance 716 on July 22, 1947; and
- § 2. WHEREAS, the final plat of a Replat of Block 6, Oak Ridge Addition was filed of record with the Cleveland County Clerk on November 14, 1947, and City Council, on July 13, 1954, placed this property in the R-1, Single Family Dwelling District with the adoption of Ordinance 884; and
- § 3. WHEREAS, the owner, Mr. Elizabeth Bevel, is requesting the property be subdivided into two (2) lots and the required improvements would be curb and gutter paving and a sidewalk in connection with Hoover Street; and
- § 4. WHEREAS, the Engineer representing the owner submitted a report that curb and gutter paving and sidewalks do not exist on either side of Hoover Street from Chautauqua Avenue to Pickard Avenue; and
- § 5. WHEREAS, the Engineer states "there will be no compromise to existing accepted improvements" by creating two lots, and "if granted, will not compromise the health, safety, or welfare of any current or future occupant or neighbor; and

NOW, THEREFORE, BE IT RESOLVED BY THE COUNCIL OF THE CITY OF NORMAN, OKLAHOMA:

- § 6. That City Council, having carefully considered all of the information above and the request for exemption, finds that the health, safety or welfare of any current or future occupant or neighbor will not be compromised by the absence of curb and gutter or sidewalks.
- § 7. That the City Council therefore grants the exemption as requested.

PASSED	AND ADOPTED this	day of	, 2023.
*-	ATTEST:	Mayor	
*7	City Clerk		