

**A STATEMENT OF WORK FOR:**



**Stillwater, OK**

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## INTRODUCTION TO BUXTON

Since our founding in 1994, Buxton has been a leading force in retail location and development. We are recognized for creating solutions that provide results.

Buxton began as a service to help retailers make informed site selection decisions by understanding their customers and precisely determining their markets. Buxton leaders soon realized that the company's expertise in retail location and market analysis could also be leveraged to benefit communities desiring retail expansion. Please note that in this proposal the term "retail" is inclusive of all retail concepts.

## Retail Matching

Designed specifically for use in community economic development programs, Buxton's Retail Matching process has assisted more than 650 public sector clients nationwide, resulting in the development of more than 35 million square feet of retail space. We integrate our impressive technical capabilities with more than 500 cumulative years of retail and healthcare management and local economic development experience to help municipalities achieve their retail goals.

More than simply providing data, Retail Matching supplies custom marketing materials and strategies targeting the unique location requirements of retailers, developers and commercial real estate brokers. Retail Matching clients achieve outstanding success using our tools for retail identification, selection and recruitment. And our clients benefit from our unique understanding of retail site selection from the retailer's point of view. The combination of technical expertise and professional guidance gives municipalities the capacity to immediately implement an effective retail development program.

## Benefits of Retail Matching

With Retail Matching you have immediate access to:

- **Retail Industry Expertise.** Gain a competitive position by working with professionals who have years of retail management experience plus current insights into your community and site selection processes and trends.
- **Community Development Best Practices.** Expand and sharpen your business development focus by incorporating best practices discovered by Buxton through daily work with municipalities across the nation.
- **Proprietary Systems.** Gather useful information by having Buxton's technology specialists analyze your trade area accessing data stored on Buxton's in-house databases.
- **Personalized Content.** Advance your business recruitment program by receiving personal guidance from our staff and ongoing insight into key industry topics via our monthly e-newsletter, webcasts and other interactive tools.
- **Marketing Data and Tools.** Enhance your marketing messages and presentations by using SCOUT®, Buxton's online trade area database and marketing tool, available to you for one year from execution of agreement.
- **Long-Term Partnership.** As a Buxton client and partner you have unlimited access to our staff to help optimize your marketing efforts at the International Council of Shopping Centers (ICSC) annual meeting in Las Vegas, NV. As a Buxton client you may utilize our booth space as a central meeting location

and display marketing collateral specific to your City at our booth. Additionally, a Buxton representative will be available for on-going calls, SCOUT® training and emails related to your needs.

## PROCEDURES

Once you have engaged Buxton to work with you in developing Retail Matching, a project team will be assigned to guide you through the entire process—from initial data collection to final presentation of the results. This team consists of:

- Account manager, who will serve as your primary source of communication during the project
- Geographic Information System specialist, who will analyze your trade areas and create customized maps and reports
- Professionals with backgrounds as retail executives and economic development practitioners, who will address your unique challenges and help maximize your opportunities

## Recommended Scope of Services

Buxton is pleased to present this Statement of Work to City of Stillwater, OK. The purpose of this Statement of Work is to outline and review the specific solutions offered by Buxton as well as the associated benefits and costs.

- City of Stillwater, OK's business objectives are:
  - Stillwater wants to understand and then capitalize on the business growth and development, business retention opportunities, healthcare opportunities and improve the overall quality of life for residents.
  - As communities increasingly compete for retail dollars and creation of jobs, attracting the attention of businesses has become more challenging than ever. Marketing your community plays a dominant role in today's competitive economy. The challenge for the community is to attract businesses by providing trade area information that is complete, accurate and up-to-date.
  - Using our proprietary methodologies, Buxton will collect and analyze your community's trade area information and give it to you in a format that is easy-to-use and appealing to real estate executives. The best information, however, is useless without a plan for using it. Much more than data collection, Buxton offers an execution strategy that can help you build or revitalize your existing marketing and economic development program.
- Benefits:
  - Achieve your retail potential by establishing a long-term partnership with Buxton
  - Work toward retaining and attracting high value, high wage jobs by analyzing how your city benchmarks against competing cities for industrial/office recruitment.
  - Understand the value of your residents, and surrounding households, provide when considered as a workforce.
  - Understand your residents access to services, retail, healthcare, municipal assets and other attractive amenities for overall quality of life benchmarks
  - Integrate retail development into your economic development program
  - Increase your success by preparing Stillwater to meet the needs of businesses

- Effectively position your community for business expansion by leveraging your locations' strengths and minimizing weaknesses
- Convey Stillwater's advantages over competitors' advantages
- Establish credibility with decision makers
- Maximize time and resources by not pursuing unqualified prospects
- Win the confidence and trust of prospects by understanding their priorities
- Use competitive analysis to close the sale

Specific solutions Buxton will provide and all Fees associated with your specific deliverables and estimated timeframes are included below:

<b><u>Scope of Services</u></b>	<b><u>Fee</u></b>	<b><u>Timeline*</u></b>	<b><u>Payment Terms</u></b>
SCOUT® Basic Access 10 SCOUT® Basic users	\$50,000	1-5 Business Days	50% Deposit Fee (due upon execution of this agreement); 25% Interim Fee, 25% Completion Fee
SCOUT® Economic Impact Access 2 SCOUT® Economic Impact Power Users		1-2 Business Days	
SCOUT® Retail Matching Access 1 SCOUT® Retail Matching Power User		1-2 Business Days	

\*Due to the consultative nature of our engagement and the custom solution that Buxton will provide you with exact timelines may be dependent upon your timely input at key points during the project. The timeline ranges included are typical for our client engagements but can vary dependent upon your response time, a variable which Buxton cannot control.

City of Stillwater, OK will be invoiced \$50,000 during the one (1) year term of this agreement. Each solution in this agreement will be invoiced in accordance with the payment terms defined in the Scope of Services table. All monthly service fees, additional scope of service requests, and travel reimbursement associated with this agreement are due in net 10 days from the date of the invoice. Any additional analysis will be billed at an hourly rate of \$250.

**Agreed and Accepted:**

**Buxton**

**City of Stillwater, OK**

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*Signature*

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*Printed Name*

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## Data Collection

Buxton uses over 250 consumer and business databases that are updated throughout the year, and in some cases, every month. Although it is possible to obtain these databases for less expense on a community or regional basis, Buxton buys and is licensed to use the complete U.S. datasets. With this information Buxton will compare your potential location to the universe of all competing locations operating in the U.S.

The following are some of the more well-known sources used in our studies, but there are dozens more that we employ to provide additional insight:

- Experian
- Simmons
- InfoUSA
- National Research Bureau
- Navteq Geographic Data
- Dunn & Bradstreet Business Data

These major components comprise the Retail Matching process. Each component is explained in detail as follows:

## Researching and Verifying City of Stillwater, OK's Retail Trade Area

The location decision process for all retailers begins with the collection, analysis and evaluation of numerous location variables such as demand density, customer buying habits, economic trends, competition, traffic volumes, and available sites, to name a few.

The Retail Matching process for City of Stillwater, OK will also start with the in-depth collection of data using the same location variables that we use for our retail clients to qualify sites for the location of their retail stores and restaurants. One goal is to define current retail situations in City of Stillwater, OK, in the trade area and in any neighboring communities that impact on the retail environment. The other goal is to understand the community's expectations and desires. This analysis includes personal visits to the community, collection of data components necessary to conduct the analysis and identification of market influencers.

## Drive-Time Trade Area Definition

Customers today shop by convenience, measuring distance based on time, not mileage. Retail Matching will employ a custom drive-time analysis to determine City of Stillwater, OK's trade area. An example of a drive-time trade area is shown in

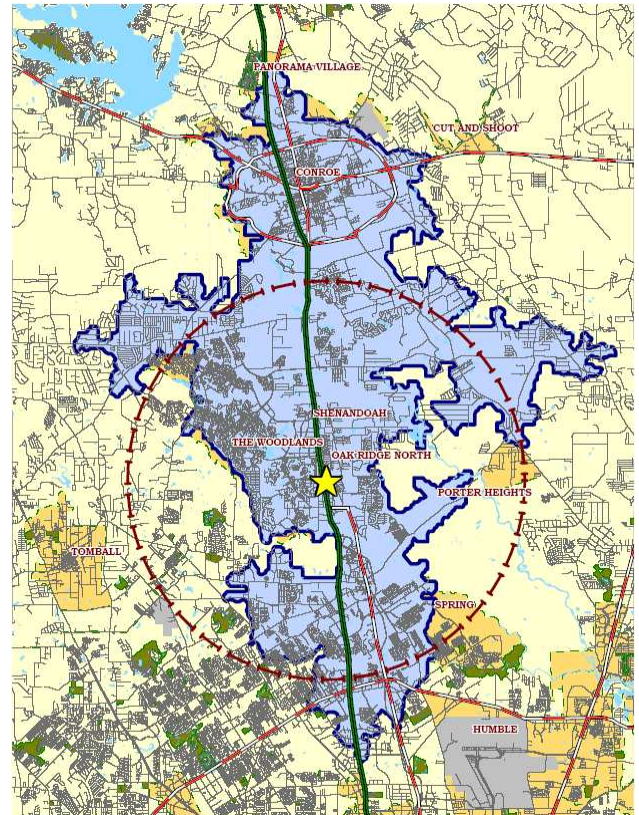
Figure1.

This custom analysis is developed using an in-house database supported by our knowledge of individual retail client's actual trade areas.

The resulting drive-time trade area map will be a polygon that more accurately depicts consumer shopping patterns than trade rings.

To assure the accuracy of the drive-time trade area, the draft maps are reviewed with community leaders and verified before proceeding with the next step.

Figure 1.Example - Drive-Time Trade Area



## Evaluating City of Stillwater, OK’s Retail Potential

The purpose of the evaluation phase is to understand what makes City of Stillwater, OK distinctive and valuable from a retailer’s viewpoint and scrutiny.

Our evaluations capitalize on Buxton’s knowledge about the retail marketplace and the location requirements and expectations of retailers. Combining this knowledge with our economic development competencies allow us to evaluate and recommend proven community practices. Our evaluations do not rely on dated government research or national/state statistics, all of which fail to reflect local realities. Rather, we implement our real-world experience gained from working with municipalities that have opened more than 35 million square feet of new or expanded retail space. We know how to help you sharpen your retail marketing strategy, aggressively market the city and improve your competitive performance.

## Retail Leakage/Supply Analysis

The Retail Leakage/Supply Analysis provides an estimate of retail dollars flowing in or out of the trade area.

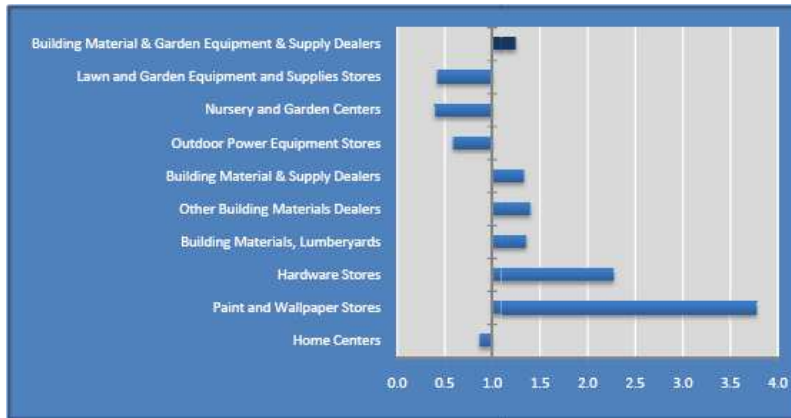
The two main components of this analysis are: 1) current sales (supply) by retail store type, in dollar amounts, and 2) estimated sales potential (demand) for retail store type, in dollar amounts.

We first calculate a sales gap index that illustrates your ability to capture your residents’ expenditures. An example of this index is shown in Figure 2.

The sales gap index provides a relative comparison of leakage/surplus and an estimate of the dollars that are being spent outside the trade area (leakage) and the amount of dollars coming in from outside the trade area (surplus).

This report can be run via SCOUT® at any location within the map view.

Figure 2.Example - Sale Gap Index

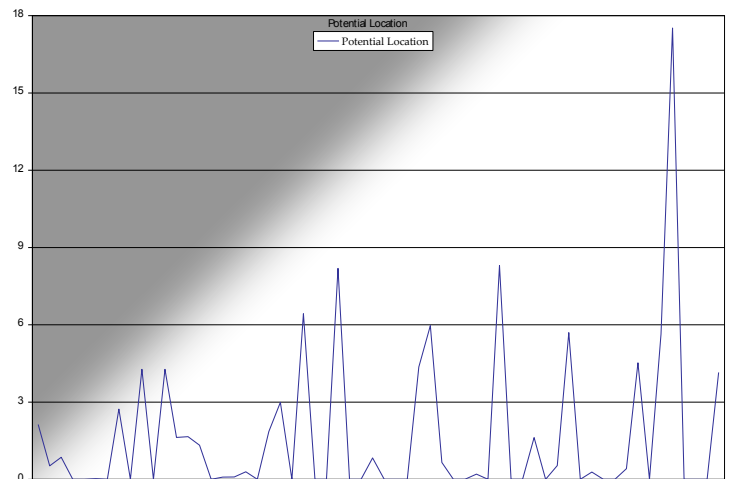


### Customer Profiling

The Retail Matching process will identify and analyze all the households in City of Stillwater, OK’s drive-time trade area. Based on more than 75,000 categories of lifestyles, purchase behaviors and media reading and viewing habits (psychographics), the households in your trade area are assessed to gain an understanding of the types of retailers that would be attracted to your community. Our in-house databases include both traditional demographic data and the most current psychographic lifestyle information for over 120 million households in the United States (as well as up to seven individuals living in each of these households).

Each household in a trade area falls into one of 60 market segments reflecting the buying habits of customers in the household. The blue line in Figure 3 graphically profiles the households in a city’s trade area.

Figure 3: Example - Psychographic Profile



## Retail Site Assessment

Buxton will analyze 3 distinct retail location/geographic areas, selected by City of Stillwater, OK. Based on our collective experience in retail locations, the following factors are considered:

- Psychographic analysis of households in trade area
- Demand for retail goods and services
- Site setting, situation and configuration
- Growth plans and relevant development
- Retail goals of the community

If the complexion of customers is distinctly similar, City of Stillwater, OK may choose to market the community as a whole instead of as 3 separate sites. If chosen, Buxton will separate retail opportunities based on operational status of each retailer.

Buxton will develop a demand density profile of City of Stillwater, OK’s trade area. Demand density measures the bottom-line value of the customers in the trade area—who they are, how many there are and what they buy. One of the significant advantages of Buxton is our ability to take the demand density data and to creatively translate it into a proactive market strategy tailored to take advantage of City of Stillwater, OK’s strengths and to achieve its retail goals.

### Matching Retailers and Restaurants to Market Potential using SCOUT®

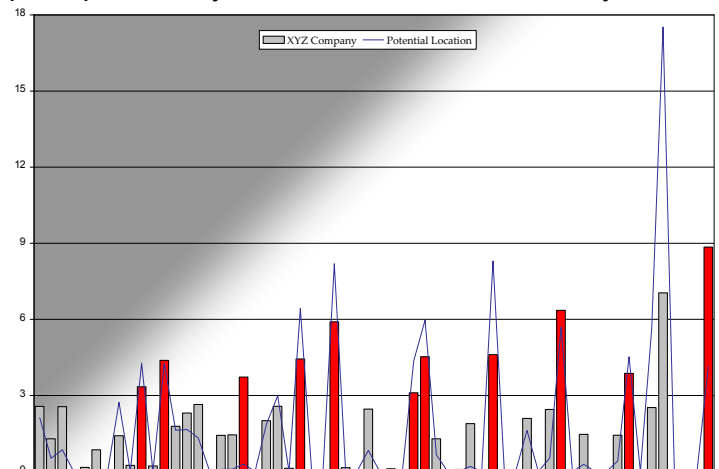
Once the site for retail matching has been selected and the consumer profiles in the trade area have been determined, the Retail Matching process will match these profiles against the customer profiles of 5,000+ retailers in our proprietary database through SCOUT®.

In Figure 4, the blue line indicates the customer profile of households in a community’s trade area. The red bar represents a specific retailer’s customer profile. A similarity between the two profiles as shown in Figure 4 analyzed using Buxton’s proprietary retail matching algorithm concludes that this site is an opportunity for a specific retailer to open a successful store.

This matching results in a list of possible retailers. To develop the preliminary retail match list, Buxton analyzes a number of factors about each possible retailer to qualify it. This analysis is designed to eliminate those retailers that for any reason would not be a candidate. Considered in this analysis are such factors as, verification of a retailer currently operating or expanding into your market, location of operations in similar cities, and competition and cannibalization from nearby locations.

Once this analysis is complete, the preliminary list of retailers will be discussed and reviewed.

Figure 4: Example - Trade Area Consumers Matched with Retailer Customer Profile





## Delivering Marketing Packages

Buxton will assemble individualized marketing (pursuit) packages for each targeted retailer. At the client’s request, Buxton will customize each marketing package for presentation to individual retailers, developers, real estate brokers or potential franchisees. Because it is tailored to the specific needs of the target audience, each marketing package is ready to use as collateral marketing materials providing compelling and precise information that demonstrates qualifications as a location.

Each marketing package contains:

1. Map of the retail site and trade area
2. Map of retailer’s potential customers
3. Retailer match report that compares the site’s trade area characteristics with the retailer’s locations in similar trade areas
4. Demographic and psychographic profiles of the households in the trade area

Retail Matching targets not only specific companies but also the individual in the company who has the responsibility for location decisions. To provide the best possible reception when the targeted retailer is contacted, Buxton notifies each company that you have been qualified by Buxton as a potential viable location for a store, restaurant or development and should expect to be contacted by a representative of the city.

Figure 5: Example - Retail Match Report (Retail Match Report summarizes a city’s location advantages for a specific retailer).

## Insights for Non-Retail Business Expansion, Recruitment and Impact

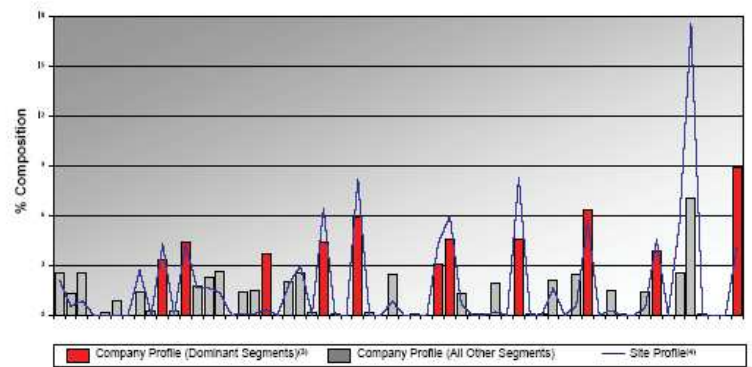
**Economic Impact** - Buxton, through a partnership with EMSI, offers Economic Impact modeling to as an addition to its web-based SCOUT® platform. Access to this Input-Output Economic Impact tool will enable simple, straightforward “what-if” scenarios to be performed for any industry to get a sense of how that industry will impact the community

Input-output models are constructed on a

### Profile Match Report

Company: Retailer XYZ	Site: W. BERRY & UNIVERSITY
Report Date:	Your Community, USA

Segmentation Profile<sup>(1)</sup> (7 Minute Drive Time)<sup>(2)</sup>



Trade Area Comparison (7 Minute Drive Time)

	Retailer XYZ Average Trade Area <sup>(3)</sup>	Your Community, USA Site Trade Area	
		Current	Projected
<b>Total Population</b>	<b>96,039</b>	<b>128,139</b>	<b>135,133</b>
<b>Total Households</b>	<b>36,790</b>	<b>45,799</b>	<b>49,573</b>
<b>Company Dominant Segment Households</b>	<b>22,122</b>	<b>33,871</b>	<b>36,662</b>

<sup>(1)</sup> Segmentation Profile  
<sup>(2)</sup> Drive Time  
<sup>(3)</sup> Dominant Segments  
<sup>(4)</sup> Site Profile  
<sup>(5)</sup> Average Trade Area

Every U.S. household is classified into one of 60 distinct segments described by that household’s lifestyle and spending habits. Drive time is used to define the trade area. Any segment that makes up at least 3 percent of a retailer’s targeted profile (RED BARS). Those segments within the site’s drive time trade area (BLUE LINE). Retailer XYZ trade areas used in this comparison are similar in population and market type to Your Community, USA.

platform of data indicating interconnectedness of the industries, households and government entities that occupy a given geographic space. Its name stems from the fact that a portion of the output (i.e., sales) of one industry will appear as the input (i.e., purchases) of other industries. The input-output model is used to simulate in turn each of the alternative uses and among its many indicators; the impact of each use on the target occupations is examined. Alternative uses of existing resources, the impact of departing industries, the impacts of new industries, these are but a few of the policy issues addressed by a regional input-output model.

### **Application:**

1. The ability to effectively understand which new industries to bring into the region and which existing industries to expand to best meet the needs of a particular cluster.
2. The impact of new businesses moving to the area or to justify, promote and market proposed developments through a solid estimation of the impacts of proposed activities.
3. Gap Analysis - Displays in dollars how much a cluster purchases from other industries, and the percent of those purchases that are satisfied from inside and outside of the region.
4. Shows the impact of an industry in a cluster and how it affects the cluster as a whole, as well as the rest of the economy.

### **Data Sources and Calculations**

#### **Input-Output Data**

The input-output model is created using the national Input-Output matrix provided by the federal Bureau of Economic Analysis. This is combined with the national Total Gross Output, the regional Total Gross Output, the land area of the subject region, regional DIRT data and regional in/out commuter patterns in order to calculate regional requirements, imports and exports. After using matrix algebra to calculate the regional multiplier, the resulting matrix is multiplied by the sales vector and converted back to jobs or earnings. Specifically, this data comes from the U.S. Department of Commerce Bureau of Economic Analysis. Industry Economic Accounts: Benchmark & Annual Input-Output (I-O) Accounts.

#### **Industry Data**

In order to capture a complete picture of industry employment, EMSI combines covered employment data from Quarterly Census of Employment and Wages (QCEW) produced by the Department of Labor with total employment data in Regional Economic Information System (REIS) published by the Bureau of Economic Analysis (BEA), augmented with County Business Patterns (CBP) and Nonemployer Statistics (NES) published by the U.S. Census Bureau. Projections are based on the latest available EMSI industry data, 15 year past local trends in each industry, growth rates in statewide and (where available) sub-state area industry projections published by individual state agencies, and (in part) growth rates in national projections from the Bureau of Labor Statistics.

#### **Shift Share**

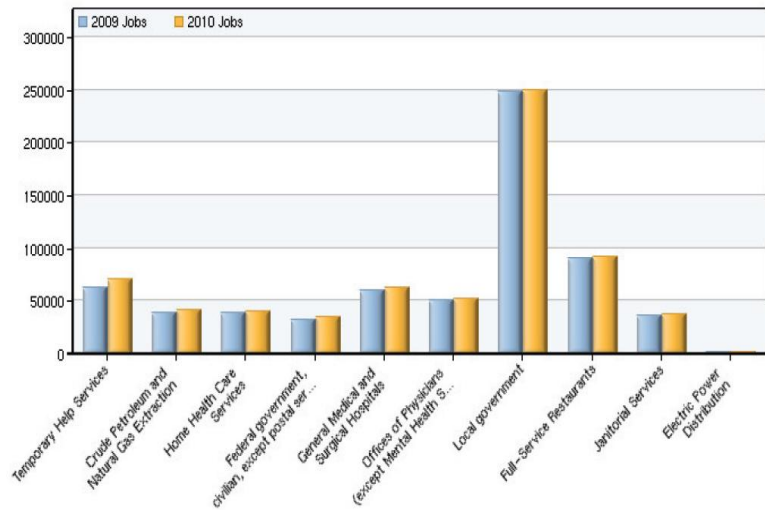
Shift share is a standard regional analysis method that attempts to determine how much of regional job growth can be attributed to national trends and how much is due to unique regional factors

Examples:

Best Industries To Meet Regional Requirements

NAICS Code	Description	\$ Required(K)	\$ Satisfied in Region(K)	Difference(K)	In Region
324110	Petroleum Refineries	\$12,162,260	\$1,898,451	\$10,263,809	yes
551114	Corporate, Subsidiary, and Regional Managing Offices	\$7,641,126	\$4,183,510	\$3,457,615	yes
522110	Commercial Banking	\$9,292,692	\$5,926,165	\$3,366,527	yes
11A000	Crop and animal production	\$3,534,783	\$765,597	\$2,769,186	yes
541330	Engineering Services	\$3,236,735	\$815,386	\$2,421,349	yes
622110	General Medical and Surgical Hospitals	\$9,093,850	\$6,944,281	\$2,149,569	yes
611310	Colleges, Universities, and Professional Schools	\$2,431,362	\$639,501	\$1,791,861	yes
524210	Insurance Agencies and Brokerages	\$4,302,748	\$2,507,648	\$1,795,100	yes
336112	Light Truck and Utility Vehicle Manufacturing	\$1,610,365			
541611	Administrative Management and General Management Consulting Services	\$2,159,126			

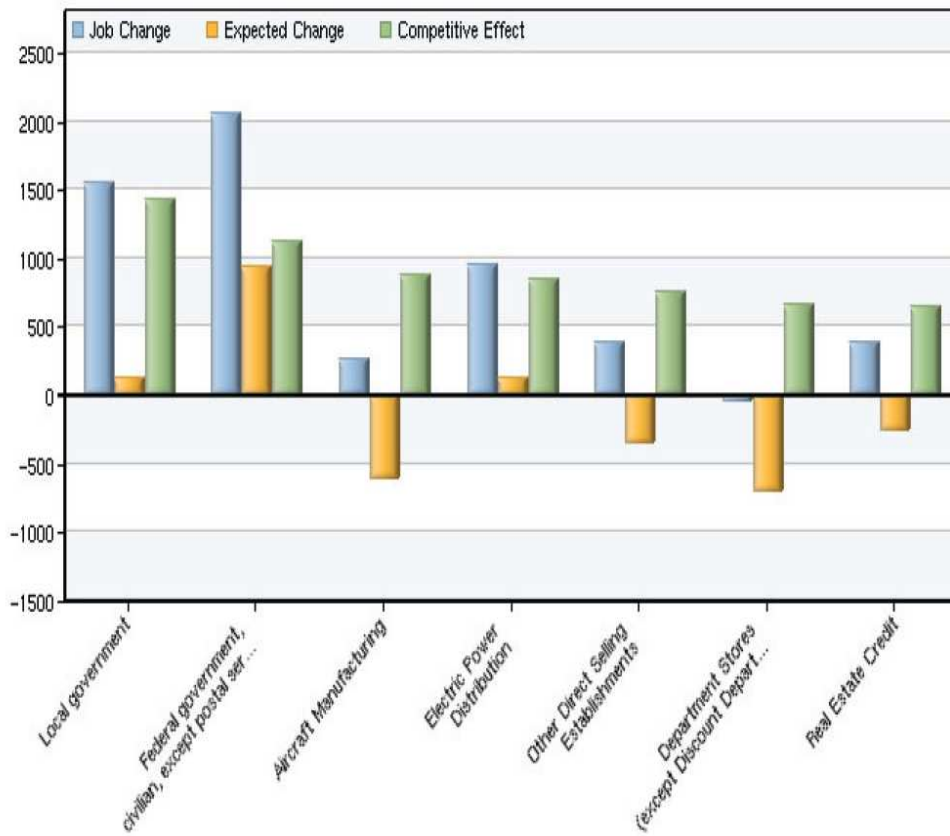
Fastest Growing Industries



NAICS Code	Description	2009 Jobs	2010 Jobs	Growth	Growth %
561320	Temporary Help Services	61,890	69,770	7,880	13%
211111	Crude Petroleum and Natural Gas Extraction	37,855	40,606	2,751	7%
621610	Home Health Care Services	37,874	40,389	2,515	7%
911000	Federal government, civilian, except postal service	32,216	34,271	2,055	6%
622110	General Medical and Surgical Hospitals	59,845	61,762	1,917	3%
621111	Offices of Physicians (except Mental Health Specialists)	49,888	51,792	1,904	4%
930000	Local government	248,583	250,135	1,552	1%
722110	Full-Service Restaurants	90,598	92,094	1,496	2%
561720	Janitorial Services	35,982	36,942	960	3%
221122	Electric Power Distribution	1,014	1,973	959	95%

Source: EMSI Complete Employment - 4th Quarter 2010

### Industries With Top Regional Competitiveness



NAICS Code	Description	Job Change	Ind Mix Effect	Nat Growth Effect	Expected Change	Competitive Effect
930000	Local government	1,552	-3,000	3,118	118	1,434
911000	Federal government, civilian, except postal service	2,055	537	404	941	1,113
336411	Aircraft Manufacturing	262	-873	263	-610	871
221122	Electric Power Distribution	959	105	13	118	841
454390	Other Direct Selling Establishments	392	-582	227	-355	747
452111	Department Stores (except Discount Department Stores)	-42	-839	142	-697	655
522292	Real Estate Credit	383	-489	224	-265	648

Source: EMSI Complete Employment - 4th Quarter 2010

## Top Multiplier Effects

NAICS Code	Description	Sales Multiplier	In Region
327320	Ready-Mix Concrete Manufacturing	2.23	yes
511120	Periodical Publishers	2.21	yes
511140	Directory and Mailing List Publishers	2.15	yes
532412	Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	2.11	yes
813211	Grantmaking Foundations	2.10	yes
532490	Other Commercial and Industrial Machinery and Equipment Rental and Leasing	2.10	yes
813319	Other Social Advocacy Organizations	2.10	yes
813311	Human Rights Organizations	2.09	yes
813219	Other Grantmaking and Giving Services	2.09	yes
813910	Business Associations	2.09	yes

Source: EMSI Complete Employment - 4th Quarter 2010

## Additional SCOUT® functionality

Increased access to market intelligence that supports efforts for business retention and recruitment.

**SCOUT®'s** base functionality will allow City of Stillwater, OK to generate on the fly reports at any geography on:

- Demographics,
- Psychographic profiles,
- Retail supply and demand estimates,
- Consumer propensities - a merchandising report which reveals your consumers affinity for nearly 5,000 product and service types
- Custom variable reporting – most comprehensive set of geographic market variables commercially available, allowing you to access and manipulate:
  - Additional demographic indicators including five year projections and historical census tabulations for 1980, 1990, and 2000)
  - Business data (employees, land use, industrial divisions, occupation, establishments)
  - Current year and five year estimates on consumer expenditure, details and summarization, for average consumer expenditures and total expenditures by product.
  - Retail potential and consumer expenditure estimates by store type, calculated overall and per household
  - Current year estimates on crime by ten categories
  - Demographic Dimensions summarizing populations by sixteen socio-economic and ethnic clusters
  - Environmental Risk Index summarizing frequency and severity across five categories of natural disasters
  - Financial estimates on assets, debt, debt type, and net worth
  - Geographic identifiers such as calculation of area in square miles for each geography selected for analysis

	<ul style="list-style-type: none"> <li>○ Foreclosure estimates</li> <li>○ Mosaic segmentation distributions by households and population across adult population, workforce, households, Mosaic Groups, by population, dominant cluster analysis</li> <li>○ Current year and five year estimates on occupation/employment estimates</li> </ul>
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## CONSUMER PROPENSITY REPORT

### Marketing and Merchandising Intelligence for Local Business-

The Consumer Propensity Report (CPR), updated every 8 weeks, shows the lifestyle, product, and psychographic likelihood indices for the consumers within the trade area being analyzed. Major retail, restaurant, grocery, and consumer packaged goods firms use this very same information to drive marketing and merchandising decisions.

Each analyzed item is assigned a propensity index score with 100 being average. For example, if the consumers within a trade score a 120 for a given analysis item you know that those consumers are 20% more likely to participate in or purchase that item than the average American household. A propensity index score of 80 would indicate that those consumers would be 20% less likely than the average American household to participate in or purchase that item.

Information is provided for 32 major categories with over 4,800 total line items. Please note that line items are based upon national-level purchasing and lifestyle characteristics. These line items are then correlated to the underlying household characteristics of the consumers within the trade area being analyzed. Some line items may not be necessarily relevant or available currently in your market or region. The index score in these situations serves to indicate the degree to which the consumers would participate in or purchase that item if it were relevant and available. Often this is taken as an opportunity for expansion of a similar brand or concept within the category.

The CPR is designed to assist the City to develop local business retention and expansion strategies. The City will be armed with fact-based data to assist independent retailers to make merchandising and marketing decisions.

#### CPR Categories

Apparel	Food: Baking	Home Improvement
Automotive	Food: Condiments	Household Products
Beverages: Alcoholic	Food: Dairy	Lawn and Garden
Beverages: Non-alcoholic	Food: Frozen	Lifestyle Statements
Cable/TV/Radio	Food: General	Medicines/Drugs/Ailments
Cleaning Products	Food: Meat	Pets and Pet Food
Computer/Internet	Food: Snack/Dessert	Print Media
Dining	Health and Beauty	Shopping
Electronics	Hispanic: Spanish Media	Telecom
Entertainment/Leisure	Hispanic: Demographic	Tobacco
Financial Services	Home Furnishings/Appliances	

Consumer Propensity Reports will be provided as part of the agreement and for the benefit of local business owners in City of Stillwater, OK. City of Stillwater, OK has the option to make this information available to the general public/ business community on its website. In addition Buxton representative will give a complementary training session and presentation during a business forum, hosted by the City of Stillwater, OK to showcase the methodology. The tutorial to attendees, invites and Chamber members will be focused on smart growth among local businesses utilizing intelligence to improve sales and marketing strategy.

The format of the CPR will be in Excel so that it can be shared with the Chamber/Downtown Associations/City and business owners throughout City of Stillwater, OK.

## HEALTHCARE ANALYSIS

Identify City of Stillwater, OK's healthcare needs through an analysis of its existing healthcare supply and demand.

### Key Steps

- 1) To determine benchmarks for comparison against City of Stillwater, OK.
  - Macro benchmark (compared to the state)
  - Micro benchmark (compared to 20 similar cities)

In order to analyze how Barstow ranks in health services and demands compared to other cities of the same size, a group of similar cities will be identified. These similar cities are determined by analyzing the following characteristics:

- Residential Population
- Employee Population
- Population Growth
- Median Age
- Household Income
- BUDS – Buxton Urban Density Score

- 2) To compare City of Stillwater, OK to the benchmarks based on the following metrics:
  - Estimated physician office visits (current year)
  - Projected physician office visits (5-year projected)
  - Projected physician office visits growth rate
  - Existing physicians
  - Existing hospital facilities
  - Hospital capacity (based on number of beds)

## PROJECT TEAM

Team members for your project will include Buxton personnel with strong retail and economic development backgrounds as well those from operations: the Vice President, Senior Vice President, Operations representative and Client Services representative.



**Lisa Hill**

Vice President

Retail Matching Division

As vice president of the Retail Matching division, Lisa works with proactive cities in California with their retail economic development efforts. She works with communities to maximize their ability to generate sales tax revenue and enhance quality of life for their citizens by successfully recruiting new retailers as well as maximizing current retail options. She is focused on communities in California, Nevada, and Utah.

Lisa received her B.A. degree from Texas Wesleyan University and is a member of the International Council of Shopping Centers (ICSC). Buxton has worked with more than 500 communities nationwide, helping to recruit over 35 million square feet of retail.



**Chip Rodgers**

Senior Vice President,

Retail Matching Division



Chip has worked with numerous municipalities throughout the United States to maximize their sales tax growth and quality of life by successfully attracting new shopping and dining options. He has shared his insights and knowledge by speaking to economic development organizations such as Florida City and County Managers Association, Virginia Municipal League, Florida League of Municipalities and Texas Municipal League. Prior to joining Buxton, Chip was with Florida-based MPS, where he worked with city and county governments to develop strategies for delivering services to their residents via the Internet. Chip is a graduate of Oklahoma State University. Buxton has worked with more than 500 communities nationwide, helping to recruit over 35 million square feet of retail.



### **Philip Davis**

Manager/Senior GIS Analyst

As senior analyst for the Retail Matching division, Philip oversees every aspect of Retail Matching projects in Buxton's GIS department. His duties include supervising daily operations, working with clients, managing projects and serving as a liaison between analysts and the sales team. Philip has managed the GIS function for more than 350 Retail Matching projects for such clients as San Jose, CA; Atlanta, GA.; and Birmingham, AL. Working on projects for two divisions in the company has given Philip a complete understanding of both the retail industry and municipal needs, adding to his expertise in community retail recruitment. Philip graduated from the University of North Texas with a degree in Geography.



### **Chris Briggs**

VP Professional Services

## Retail Matching Division

As Vice President of Professional Services for the Retail Matching division, Chris works to align public sector partner needs with Buxton's ever-evolving capabilities. In this role he also serves as a liaison between Buxton's public sector partners and analytic staff.

Chris' extensive background with Buxton includes working in Senior GIS Analyst positions with the Retail Matching, Customer/ID and Healthcare/ID divisions. Most recently Chris served as Buxton's Director of Operations where he oversaw the people, processes, and technologies that support the entirety of Buxton's client base. This experience has instilled within Chris a unique perspective as to what Buxton's tools and insights can do to help its public sector partners in their efforts to create better communities.

Chris graduated from the University of North Texas. He was named the UNT College of Arts and Sciences Alumni of the Year in 2007, and he was recognized as the UNT Geography Outstanding Alumni for 2007. Chris served as a private sector partner on the planning committee for the 2009 International City Managers Association conference in Montreal.



### **Bill R. Shelton, CEcD**

Partner

## Retail Matching Division

Bill is a founding partner of Retail Matching, Buxton's retail development program for communities. For more than 20 years, Bill worked for the Fort Worth Chamber of Commerce, serving 16 years as its president. He is a Certified Economic Developer and is past chair of the American Economic Development Council. A founding member of the Texas Economic Development Council, he has served as the organization's president. Bill was honored with a lifetime membership to the International Economic Development Council. Bill's professional service also includes serving as dean of the Basic Economic Development Course at Texas A&M University. Bill holds a bachelor's degree in marketing from the University of Texas at Austin, and he completed post-graduate studies at Texas A&M University.



## Harvey H. Yamagata

### Partner

Clients benefit from the expertise Harvey has gained during 35 years in retail, including leadership roles in brick and mortar, catalog and website retailing. His 20-year career at Tandy Corporation covered the time when the company grew from \$350 million to \$3.5 billion in sales and took him from retailing in Europe to opening distributors in Asia. He headed the marketing efforts of the RadioShack Business Products division at a time when they held the major share in the burgeoning personal computer market. Harvey received a bachelor's degree from the University of Wisconsin and a master of business administration degree from Texas Christian University.

## PROJECT REQUIREMENTS

To effectively initiate this project, we request that you provide the following:

### 1. Project Liaison

- City of Stillwater, OK will designate a project manager who will serve as Buxton's primary contact during the project.

### 2. Community Information and Reports

- Logo (vector file – request from your ad agency and/or printer)
- Addresses and descriptive information for up to four sites that will be evaluated
- Current traffic count data
- List of planned retail, commercial or mixed use (either proposed or in development) in the community
- List of major, national or regional retailers that have closed, left or moved from the community
- General community marketing materials, data and economic reports

### Project Launch

A conference call with representatives of City of Stillwater, OK and the Buxton Project Team will officially launch the project. The project launch will occur when:

1. An agreement is executed
2. The initial payment is received, and
3. The Community Information and Reports are received



**ACH Payment Authorization Form**

Please sign and complete this form to authorize Buxton to make ACH debits from your bank account

By signing this form you give Buxton permission to debit your account the total amount due as indicated by the contractual agreement. This is permission for transactions to be debited on the 15<sup>th</sup> of each month as indicated by the agreed upon payment terms, and does not provide authorization for any additional unrelated debits or credits to your account.

**For your initial setup a completed authorization form must be submitted by the 10<sup>th</sup> to have your account debited by the 15<sup>th</sup> of that same month. If the 15<sup>th</sup> falls on a weekend payment will be processed the next business day. Written cancellation of this agreement must be submitted to our office within 5 business days of the next scheduled debit.**

Please complete the information below:

\_\_\_\_\_ authorizes Buxton to charge its bank account indicated below

(Customer Name)

the total amount due as indicated on my Buxton invoice on or after the 15<sup>th</sup> of each month.

Name \_\_\_\_\_

Billing Address \_\_\_\_\_ Phone# \_\_\_\_\_

City, State, Zip \_\_\_\_\_ Email \_\_\_\_\_

Name on Account: \_\_\_\_\_

Bank Name: \_\_\_\_\_

Bank Account Number: \_\_\_\_\_

Bank Routing #: \_\_\_\_\_

Bank City/State: \_\_\_\_\_

This Bank Account is Enabled for ACH Transactions  Yes  No

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

NAME (printed) \_\_\_\_\_

I certify that I am an authorized user of the bank account as stated above and that I have the authority to authorize this payment on the accounts behalf. I understand that because this is an electronic transaction, these funds may be withdrawn from the account as soon as the above noted transaction date. In the case the transaction is returned for Non Sufficient Funds (NSF) I agree to an additional \$25.00 charge for each attempt returned NSF, which will be added to your Buxton account balance. I have certified that the above bank account is enabled for ACH transactions, and agree to reimburse Buxton for all penalties and fees incurred as a result of my bank rejecting ACH debits or credits as a result of the account not being properly configured for ACH transactions. Both parties agree to be bound by NACHA Operating Rules as they pertain to this transaction. I acknowledge that the origination of ACH transactions to its account must comply with the provisions of U.S. law. I agree not to dispute this transaction with my bank or Buxton provided the transaction corresponds to the terms indicated in this authorization form.