

Oklahoma Capitol Improvement Authority

Facilities and Property Survey Private Use Checklist

This checklist is intended to help you determine and report projects that may have potential private use implications as they relate to tax-exempt state issued bonds. For the purpose of this checklist, the term “Project” means the project financed by an OCIA bond issue for your particular governmental entity, and the term “Private Entity” means any person or entity other than the State Entity for which the bonds were issued.

A “yes” answer to any question below may indicate that there is potential private use of the Project with regard to IRS limitations on tax-exempt municipal bonds. Please contact OCIA if you have any questions.

Agency/Institution	Bond Series	
College/University Project Ref Number/Name	Date Prepared	
1. Has the Project, or any portion of the Project, been sold or transferred, or will it be sold or transferred, to a Private Entity? Attach summary of transactions as attachments.	<input type="checkbox"/> No <input type="checkbox"/> Yes	
2. Is any Private Entity currently leasing or renting, or will lease or rent the Project or portion of the Project? (lease space for vending machines, pay phones, ATMs or similar space may be omitted)	<input type="checkbox"/> No <input type="checkbox"/> Yes	
3. Does any Private Entity currently have, or will it have, a franchise agreement or contract to operate, manage, or provide any exclusive services with respect to the Project at any time? (Examples - food service operations; contracts for services incidental to the Project, such as janitorial services and office equipment may be omitted)	<input type="checkbox"/> No <input type="checkbox"/> Yes	
4. Is there, or will there be, any scientific research conducted at the Project, where the research is sponsored by a Private Entity and the Private Entity has a right to a license or to otherwise use the technology that will result from the research? (General research can be omitted from this survey response.)	<input type="checkbox"/> No <input type="checkbox"/> Yes	
5. Does any Private Entity have, or will it have, a special legal entitlement or special arrangement to use the Project? This would include use of the facility/equipment by the federal government for other than exempt research.	<input type="checkbox"/> No <input type="checkbox"/> Yes	

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VP for Administration/CFO

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Date