



CEDS

Comprehensive Economic Development Strategy

January 2014

MAPA Economic Development District

PREPARED BY THE METROPOLITAN AREA PLANNING AGENCY

(THIS PAGE IS INTENTIONALLY BLANK)

OMAHA-COUNCIL BLUFFS METROPOLITAN AREA PLANNING AGENCY
ECONOMIC DEVELOPMENT DISTRICT GOVERNING BOARD
RESOLUTION NUMBER 2014-01

WHEREAS, the members of the Omaha-Council Bluffs Metropolitan Area Planning Agency (MAPA) have been formally designated by their respective legislative bodies to act as the official representative in planning matters of mutual concern; and,

WHEREAS, the MAPA Economic Development District (EDD) has been delegated the responsibility for the development and maintenance of the region's Comprehensive Economic Development Strategy (CEDS); and,

WHEREAS, the MAPA EDD Governing Board has appointed a Strategy Committee charged with developing specific recommendations regarding the content of the region's CEDS; and,

WHEREAS, the MAPA EDD Strategy Committee has developed a complete CEDS for the MAPA region; and

WHEREAS, public comment has been formally solicited for a 30-day period prior to consideration by the EDD Governing Board; now therefore be it,

RESOLVED, that the Omaha-Council Bluffs Metropolitan Area Planning Agency Economic Development District Governing Board approves the 2014 Comprehensive Economic Development Strategy for the MAPA region, incorporating public comment as appropriate, and recommends that said document be forwarded to the appropriate state and federal agencies.

PASSED this 30th Day of January, 2014



Ron Kohn, Chairman
MAPA EDD Governing Board

(THIS PAGE IS INTENTIONALLY BLANK)

ABSTRACT

- TITLE:** MAPA Comprehensive Economic Development Strategy
- PROJECT COORDINATORS:** Greg Youell, Executive Director
Grant Anderson, Community/Economic Development Planner
- PLANNING AGENCY:** Omaha-Council Bluffs Metropolitan Area Planning Agency
- COMMITTEE LEADERSHIP:** MAPA EDD Strategy Committee
- OTHER STAFF ASSISTANCE:** John Bair, Graphics Specialist
Josh Corrigan, GIS Coordinator
Lynn Dittmer, Community/Economic Development Manager
Matt Roth, Community/Economic Development Planner
- SOURCE OF COPIES:** Metropolitan Area Planning Agency
2222 Cuming Street
Omaha, NE 68102
Phone: (402) 444-6866
Fax: (402) 951-6517
Email: mapa@mapacog.org
Website: www.mapacog.org
- DATE:** Winter 2014
- ABSTRACT:** The Comprehensive Economic Development Strategy (CEDS) for the MAPA Economic Development District presents an analysis of various economic trends in the area. Goals and strategies are developed based on that analysis and other available information. The goals and strategies will address the future development needs of the region.
- PRICE:** \$20.00- Bound paperback version
\$10.00- CD-ROM or DVD-ROM
- The MAPA CEDS can be downloaded electronically at <http://www.mapacog.org/ceds-plan>.

(THIS PAGE IS INTENTIONALLY BLANK)

TABLE OF CONTENTS

PAGE

SECTION I – THE MAPA ORGANIZATION & CEDS PROCESS

A. Introduction	2
B. Organization & Background of MAPA.....	3
C. Political Geography of the MAPA Region	6
D. CEDS Process	8
E. EDD Strategy Committee	9
F. Civil Rights	10
G. Economic Development Services of the MAPA Region	11
H. Economic Development Resources in the MAPA Region	15

SECTION II – MAPA REGION DEMOGRAPHICS & STATISTICS

A. Overview	21
B. Population	21
C. Households	26
D. Education	27
E. Labor Force & Employment.....	29
F. Transportation.....	34
G. Utilities	39
H. Agriculture.....	42
I. Natural Environment & Resources	44

SECTION III – ANALYSIS OF ECONOMIC CONDITIONS

A. Overview	48
B. EDA Required Performance Measures.....	48
C. Economic Indicators	49
Personal Income	49
Household Income.....	51
Poverty	53
Cost of Living.....	54
Housing	55
Retail Sales	59
D. Land Area & Land Use	60
E. Key Business/Industry Clusters.....	63
F. Opportunities & Challenges.....	65

SECTION IV – REGIONAL ECONOMIC PRIORITIES

A. CEDS Vision Statement	69
B. Economic Development Goals & Strategies	69
C. Programs & Projects	73

SECTION V – CEDS PLAN OF ACTION

A. Implementation Strategy	82
B. Community & Private Sector Involvement	83
C. Coordination with State Economic Development Priorities	83
D. Plan Evaluation & Program Monitoring.....	84

SECTION VI – DISASTER & ECONOMIC RECOVERY & RESILIENCY STRATEGY

A. Regional Recovery Strategy.....	86
------------------------------------	----

TABLES

1. Economic Development Incentive Programs	19
2. 2000 & 2010 Census Population Comparisons	21
3. 2000 & 2010 Census Population Comparisons for Cities and Villages	22
4. Incorporated/Unincorporated Population	23
5. Population by Age Distribution	23
6. Population by Race	25
7. 2010 Household Data.....	26
8. Public/Private School Districts & Enrollment.....	27
9. Post Secondary Education Institutions & Enrollment	28
10. Employment & Annual Wage.....	29
11. Jurisdictional Unemployment Rates	29
12. Number of Business Establishments	31
13. Top 50 MAPA Region Employers	31
14. Major Employers by County	32
15. Employment Distribution by Industry	33
16. Mainline Length by Federal Functional Classification	34
17. Airport Facilities.....	36
18. Commuter Means of Travel	37
19. Electric & Natural Gas Utility Providers.....	39
20. Average Retail Prices for Electrical Uses	39
21. Municipal Waterworks Characteristics (cities +1,000 in population).....	40
22. Municipal Wastewater Treatment Characteristics (cities +1,000 in population).....	40
23. 2007 Agriculture Census Statistics	42
24. Major Agriculture-Related Employers	43
25. Average Monthly Climate Data.....	44
26. Per Capita Income	49
27. Total Number & Percent of Individuals in Poverty, 2008-2011	53
28. Omaha-Council Bluffs MSA Cost of Living Index.....	54
29. Metropolitan Area Cost of Living Comparison.....	54
30. Housing Growth	55
31. Median Home Value.....	58
32. Cost of Living Comparison for Housing	58
33. Net Taxable Sales	59
34. Net Taxable Sales of MAPA Region's Largest Cities.....	59
35. Land Area & Population Density.....	60
36. Urbanized Area Land Growth & Population Density	60
37. Land Use Inventory	61
38. Economic Development Project Inventory	79
39. Implementation Activities.....	82

CHARTS

1. Age Distribution Comparison.....	24
2. Race Distribution Comparison.....	25
3. Educational Attainment, Population 25 Years & Over.....	28
4. Unemployment Rate Comparison.....	30
5. Distribution of Industry among Top 50 MAPA Region Employers	32

6. Market Value of Agriculture Production, 2002 & 2007 Comparison	42
7. Per Capita Personal Income Comparison.....	49
8. Median Household Income Comparison.....	51
9. Household Income Distribution.....	52
10. Annual Poverty Rate Trend, 2008-2011	53
11. Housing Growth Distribution.....	55
12. Age of Housing Stock.....	56
13. Recorded Residential Building Permits.....	56
14. Distribution of Occupied Housing	57
15. Percent of Occupied Housing.....	57
16. Active Urban Land Uses.....	61

MAPS

1. MAPA Region.....	4
2. Omaha, NE-Council Bluffs, IA MSA.....	5
3. MAPA Region Transportation Facilities	38
4. MAPA Region Water Sources	46
5. Economically Distressed Census Tracts.....	50
6. MAPA Region Land Use	62

(THIS PAGE IS INTENTIONALLY BLANK)

SECTION I
THE MAPA ORGANIZATION & CEDS PROCESS

INTRODUCTION

A comprehensive economic development strategy (CEDS) is designed to create an economic roadmap to diversify and strengthen regional economies through the collaboration of public and private sectors. The purpose of this CEDS is to establish a process that will help to create jobs, foster a more stable and diversified economy, and improve living conditions within the MAPA region. In addition, this CEDS should provide useful benchmarks by which the MAPA regional economy can evaluate opportunities with other regions in the national economy.

This CEDS document :

- Describes the challenges, opportunities and resources of the MAPA region; and
- Presents the MAPA region's goals and strategies; and
- Establishes priority programs and projects for implementation.

The Economic Development Administration Reform Act of 1998 identifies a CEDS as a requirement to apply for assistance under the Economic Development Administration's (EDA) Public Works and Economic Adjustment programs. In 2007 EDA designated MAPA as an Economic Development District (EDD). With this designation, MAPA is the principle planning organization for the region and is eligible for EDA planning investment assistance. MAPA is responsible for submitting a new CEDS to EDA at least every five years.

EDDs play a key role in local economic development. Instead of having to respond to individual requests from over 2,000 eligible county economic development organizations around the nation, EDDs assist EDA in establishing regional priorities for projects and investments. Boards comprised of local elected officials and private sector representatives from cities and counties govern these multi-county or other regional planning organizations.

This CEDS document should be readily accessible to the economic development stakeholders in the MAPA region. There should be a continuing program of communication and outreach that encourages broad-based public engagement, participation and commitment of partners. The general public, government decision makers, and business investors should be able to use this document as a guide to understanding the regional economy and to take action to improve it. The strategy should take into account and, where appropriate, incorporate other planning efforts in the region. Its quality should be judged by its usefulness as a tool for local decision-making.

ORGANIZATION & BACKGROUND OF THE OMAHA – COUNCIL BLUFFS METROPOLITAN AREA PLANNING AGENCY

The Omaha-Council Bluffs Metropolitan Area Planning Agency (MAPA) is a regional council of governments serving Douglas, Sarpy and Washington counties in Nebraska, and Mills and Pottawattamie counties in Iowa (see Map 1 on Page 4). These counties comprise the Omaha, NE-Council Bluffs, IA Metropolitan Statistical Area (MSA), along with Cass and Saunders counties in Nebraska and Harrison County in Iowa¹. A map of the entire MSA can be found on Page 5.

The MAPA staff consists of 15 full-time and 2 part-time employees. Professional planners of the agency provide assistance to local governments with transportation planning, economic and community development, specialized data services, grant administration, and administrative support for regional projects. MAPA's funding in FY 2013 came from the following sources: federal government (43%), state sources (34%), special projects (12%), member counties (7%), and community development contracts (4%).

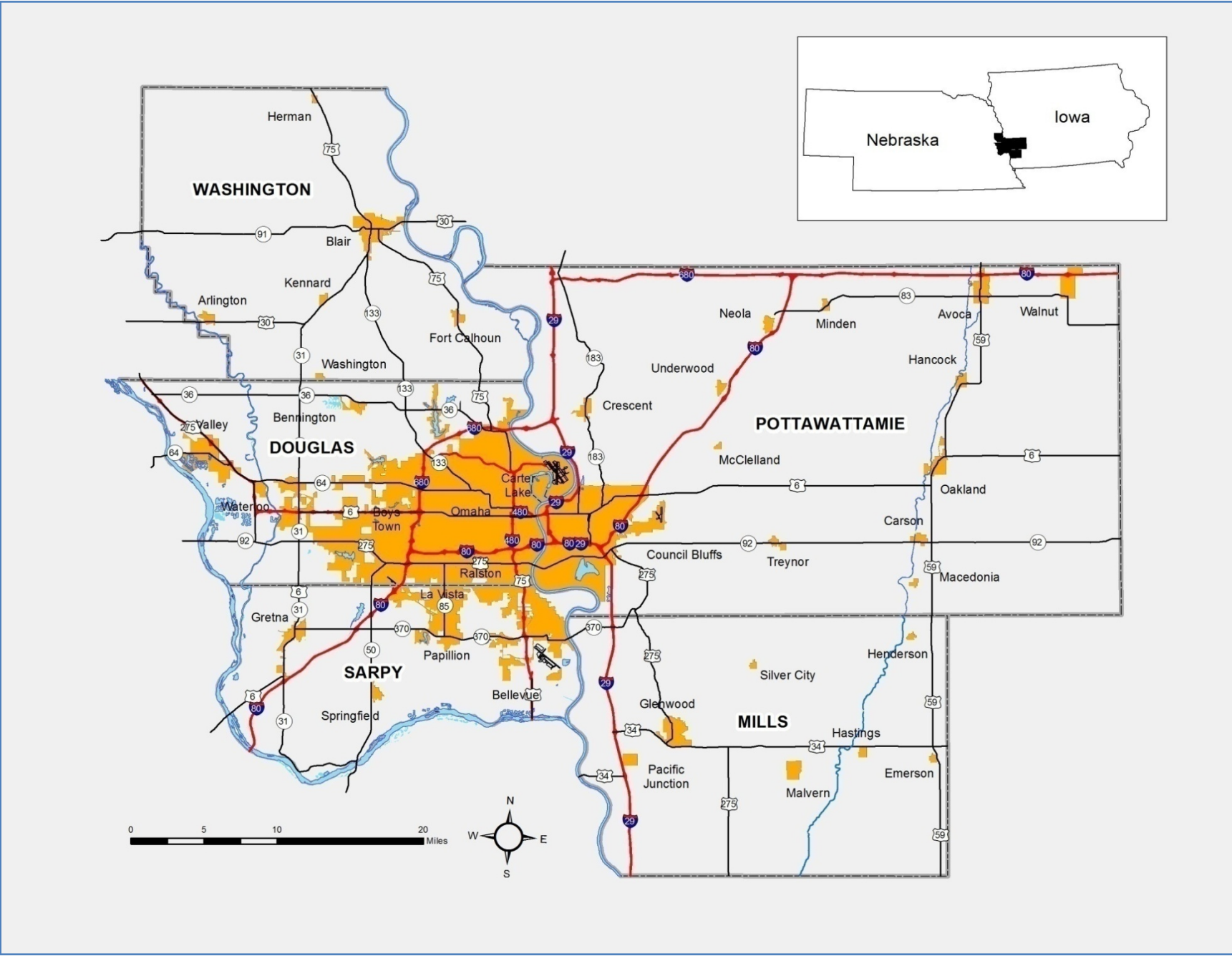
Since its inception in 1967, MAPA's mission has been to provide a forum for coordinating local planning and development activities. It brings local governments in the region together to address problems, which are regional in scope and which many times, cross-jurisdictional boundaries. When working with its member counties, communities, and special purpose entities on projects and programs, MAPA coordinates and consults with a wide network of public and private contacts throughout the region. These contacts include the staffs and elected officials of cities and counties, economic development departments in Nebraska and Iowa, state data centers in Nebraska and Iowa, local chambers of commerce, economic development organizations, natural resource districts, utility companies, public and private universities, and community colleges.

Today, more than ever, because of changes in the economy, industrial technology and world trade, governments in the region are being challenged to take a more active role in economic activities that influence community development. This has led to the need for professional assistance in developing and implementing programs to both preserve and expand existing businesses as well as to attract new investment. Coordinating these activities is vital in order to reduce duplication of services and to make efficient and effective use of regional resources.

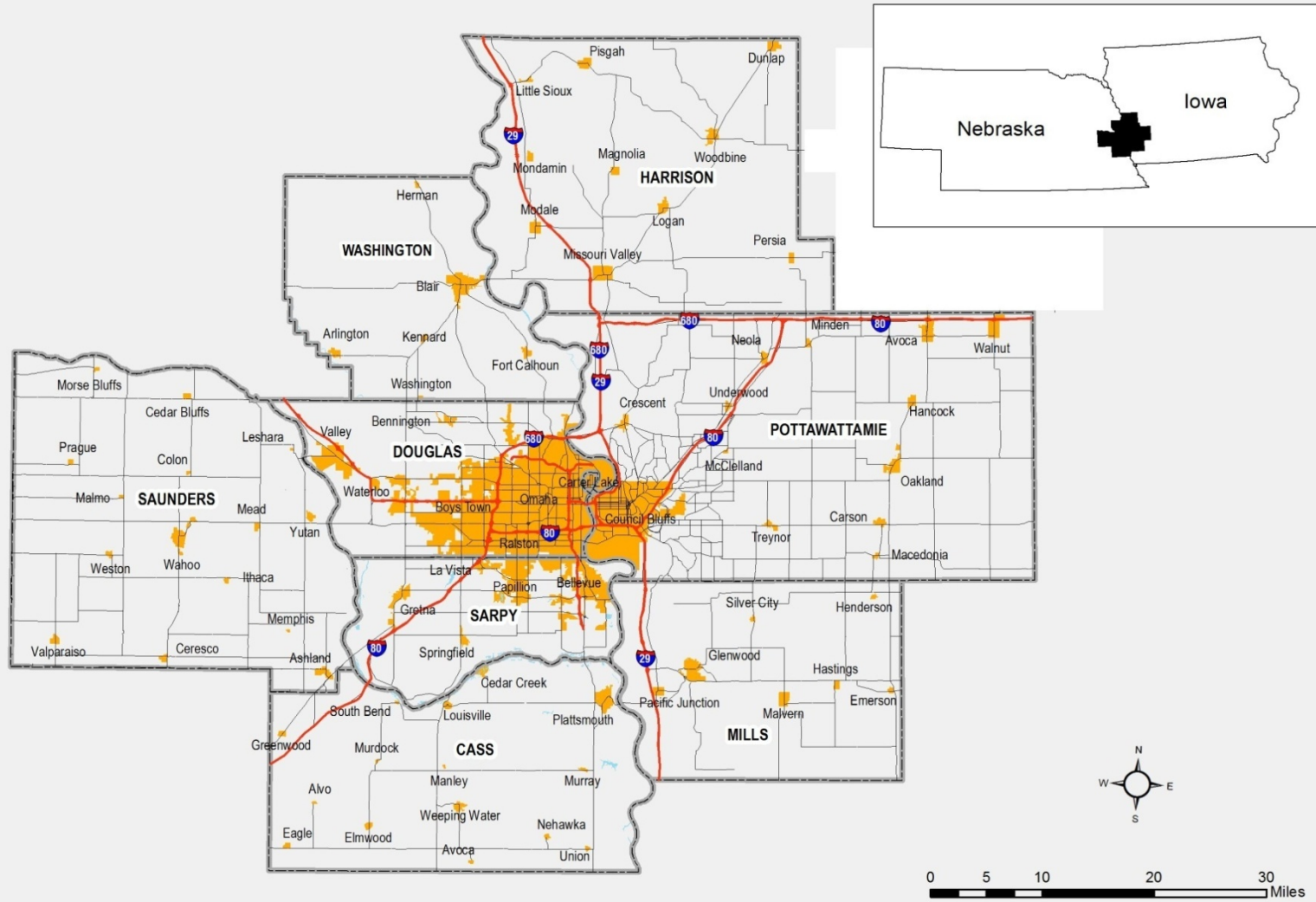
A number of organizations in the MAPA region address issues associated with economic development. The local chambers of commerce, county development organizations, utility companies, community colleges, economic development foundations, and others cooperate with one another on efforts that will make the MAPA region a vital, forward-looking area for development. MAPA works well with all these groups and others to assure open and appropriate communication, and to make sure that everyone has information about the variety of economic development activities available.

¹ Cass, Harrison and Saunders counties are not MAPA members.

MAP 1 – MAPA Region



MAP 2 – Omaha, NE-Council Bluffs, IA MSA



POLITICAL GEOGRAPHY OF THE MAPA REGION

The MAPA region has 63 members in five counties. Current membership consists of five counties, 38 towns, 20 special-purpose entities, and one city council. Each of the 63 members has representation on the Council of Officials. Special-purpose entities include:

Bellevue Public Schools	Millard Suburban Fire District
Council Bluffs Airport Authority	Omaha Airport Authority
Council Bluffs Planning Commission	Omaha Housing Authority
Fremont Public Schools	Omaha Planning Board
Golden Hills Resource Conservation & Development District	Omaha Public Power District
Iowa Western Community College	Papillion/La Vista Public Schools
Metro Transit	Papio-Missouri River Natural Resources District
Metropolitan Community College	Pony Creek Drainage District
Metropolitan Utilities District	Ralston Public Schools
Millard Public Schools	Valley Fire Protection District #5

MAPA is also the designated Metropolitan Planning Organization (MPO) for the urbanized portion of the Omaha-Council Bluffs Metropolitan Statistical Area (MSA) and as such prepares the Long-Range Transportation Plan for the MPO every five years and the annual Transportation Improvement Program.

The five counties vary in the degree to which they are positioned to address economic development issues, but all jurisdictions are represented by an economic development organization. The Greater Omaha Chamber of Commerce is the largest and most expansive organization in the MAPA region. The Omaha chamber represents the eight counties of the Omaha-Council Bluffs MSA but there are more locally-driven organizations in the five MAPA counties. The Gateway Development Corporation and Sarpy County Economic Development Corporation, both located in the offices of the Omaha chamber, work to recruit and develop commercial and industrial enterprises in Washington and Sarpy counties. Development organizations in the MAPA region's Iowa counties include the Council Bluffs Area Chamber of Commerce, the Greater Council Bluffs Regional Economic Development Partnership, the Western Iowa Development Association, and the Glenwood-Mills County Chamber of Commerce. A comprehensive list of MAPA region economic development organizations can be found on Pages 17 and 18.

The Omaha Airport Authority, a political subdivision of the City of Omaha, has no taxing authority, but is a positive influence on economic development since it must spend its revenue on maintenance, operation, and development of the airport. It has an "A1 Stable" rating from Moody's and an "A+ Stable" from Standard and Poor's. Metro Transit, which has taxing authority, is the local bus transportation provider in the metropolitan area.

In Nebraska, the state authorizes public power districts to negotiate rates to stimulate economic development as an inducement to attract major projects in the state. Such projects must meet certain energy, investment, and job creation thresholds. In Iowa, MidAmerican Energy, the energy provider in Mills and Pottawattamie counties, has consultants that provide assistance with site selection, building and site reports and tours, project incentives and financing programs, and project negotiation assistance.

Both community college districts serving the MAPA region have active economic development programs. Iowa Western Community College in Council Bluffs is involved in a number of activities that help to strengthen regional economic development, including the Iowa Western Small Business Development Center, the Entrepreneurial Center, the Iowa Jobs Training

Program, and the Industrial New Jobs Training Program. Metropolitan Community College's Workforce Development Institute in Omaha has programs committed to developing the region's workforce by partnering with businesses and industry to establish long-term relationships for continuous enhancement of employee skills. Since 1999, the University of Nebraska at Omaha's Peter Kiewit Institute for Information Science, Technology and Engineering has attracted high-tech business investment. The Peter Kiewit Institute develops and educates students for the technology and engineering sectors and also conducts research through academic programs.

THE CEDS PROCESS

The first MAPA region CEDS was developed in 2002. Subsequent updates followed in 2004, 2008 and this current version. MAPA began its first year in EDA's Partnership Planning program and was designated as an Economic Development District (EDD) in 2007. Shortly thereafter, MAPA's Board of Directors approved bylaws and board composition that provided formal appointment of the MAPA EDD Governing Board and Strategy Committee. MAPA began working with the Strategy Committee in conjunction with the 2008 CEDS update as required by EDA. The committee was and continues to be made up of individuals from the private sector (at least 51 percent) and other institutions (no more than 49 percent) including government, education, nonprofits, etc.

The 2014 CEDS revision was completed by the Strategy Committee and MAPA staff throughout 2013. The Strategy Committee met three times between June and August of that year to review content and make appropriate revisions. The Strategy Committee was also tasked with providing guidance and recommendations related to disaster and economic recovery and resiliency. Due to the increasing need for strategic planning and recovery given the rise of natural and man-made disasters, EDA now requires that all CEDS updates include a section that identifies pre-disaster preparedness and post-disaster planning implementation. This section should assist EDDs with a plan to mitigate and/or recover from a disaster. This newly included supplement can be found in Section VI. It is expected that this section will undergo periodic revisions as more data and input are obtained.

Prior to formal adoption, the CEDS was made available for public comment and review for 30 days beginning on December 30, 2013. Public notices were posted outside MAPA's offices and on the agency's website and social media accounts (Facebook and Twitter). Notices were also published in the official newspapers that cover the region. Strategy Committee members reviewed comments and made appropriate revisions as deemed necessary. The completed CEDS was approved by the MAPA EDD Governing Board by agenda action item on January 30, 2014.

In conjunction with the agency's Partnership Planning program and to ensure continued engagement in the regional planning process by the Strategy Committee, MAPA will submit an updated CEDS performance report to EDA on or before September 30 of each year, highlighting accomplishments and reflecting changes to regional economic development priorities. Within five years of EDA approval of this CEDS, the Strategy Committee and MAPA EDD Governing Board will complete a full revision in order to satisfy federal requirements.

EDD STRATEGY COMMITTEE

The MAPA EDD Strategy Committee was appointed by the MAPA EDD Governing Board in 2007 after the agency and its member counties received Economic Development District designation. The committee is responsible for reviewing the CEDS document and establishing goals and objectives, and will be charged with submitting annual CEDS updates to the MAPA EDD Governing Board. The 2014 MAPA CEDS was developed with leadership from the following committee:

Private Sector Representatives

Jeff Beals, President, Caldwell Banker World Group
Deborah Keating, Vice President-Community Development, First National Bank
Scott Keep, Vice-President, Metropolitan Utilities District
Randy Lenhoff, President, Seldin Company
Matt McCann, Corporate Marketing Manager, Lyman-Richey Corp.
Ron Tekippe (Chair), Vice President, HGM Associates
Larry Winum, President, Glenwood State Bank

Representatives of Other Economic Interests

Ann Birch, Community Development Director, City of La Vista, Nebraska
Jerry Deichert, Director, Center for Public Affairs and Research, University of Nebraska-Omaha
Winsley Durand, Minority Economic Development Director, Greater Omaha Chamber of Commerce

This core planning committee satisfies federal requirements through its broad representation of the economic interests of the region, involvement of private sector representatives, and inclusion of key delegates representing workforce, education, and minority interests. As required by EDA, at least 51 percent private sector stakeholders and no more than 49 percent of other stakeholders represent the Strategy Committee.

CIVIL RIGHTS

Minority and female representation on the MAPA EDD Governing Board is 6 percent and 26 percent, respectively. While MAPA cannot dictate to its members whom to appoint, it encourages sponsors to consider appointments of women and minorities when possible.

MAPA and the MAPA EDD are firmly committed to providing services and employment opportunities on a non-discriminatory basis. All programs are offered to all persons regardless of race, color, sex, age, national origin, religion, disability, political beliefs and marital or family status. The Board has adopted personnel policies which address equal opportunity and civil rights. MAPA actively encourages women, minorities, and low-to-moderate income individuals to become involved in its programs.

Persons with disabilities who require alternative means for communication of program information (Braille, large print, audiotape, etc.) should contact MAPA by phone at (402) 444-6866, by fax (402) 951-6517, or by email at mapa@mapacog.org. Normal business hours are 8:00 a.m. to 4:30 p.m. Central Standard Time.

To contact the United States Department of Commerce – Economic Development Administration, contact the Economic Development Representative at (515) 284-4746, or fax (515) 284-6641.

ECONOMIC DEVELOPMENT SERVICES OF THE MAPA REGION

DATA & INFORMATION SERVICES

Data and information services are critical to economic development activities because they provide detailed pictures of past, present, and projected trends for the MAPA region. Some of the information activities for which MAPA is most well known and for which MAPA's participation is sought after include:

Community Profiles

MAPA maintains community profiles and maps of jurisdictions/counties and communities based on census demographics and other sources of information. These profiles include population, race, age and sex, household and housing unit, income, educational attainment, and more.

Data and Information Distribution

MAPA acquires data from the United States Census Bureau and various other public and private agencies. This information ranges from brief summaries to detailed reports and is provided to jurisdictions, businesses, development personnel, not-for-profit agencies, and others.

Data Resources Committee

The Data Resources Committee is comprised of 20 regional data generators/providers to discuss regional data and its generation and dissemination. Reports are shared, presentations on the origination and generation of data are given, and discussions are held on how best to coordinate data services in the region. Being aware of available jurisdictional data allows all members to provide knowledgeable assistance for economic development projects.

Geographic Information Systems (GIS)

MAPA's GIS capabilities have played an important role in various economic and community development activities. GIS has performed detailed market studies for proposed developments, provided socio-economic characteristics of neighborhoods and their residents for grant writers and neighborhood planners, compiled comparative statistics profiling one area of the region to another, and provided population, race and Hispanic origin information for redistricting.

Nebraska GIS Association and Iowa Geographic Information Council

MAPA is a member of both of these groups and is actively involved with GIS practitioners in Nebraska and Iowa to assist, educate, coordinate and guide the implementation of development of geospatial information and related technologies. These technologies include, but are not limited to, GIS, the Internet, and global positioning technologies.

Douglas County GIS Technical Committee

As a sub-committee of the Nebraska GIS Association, this committee meets regularly to work on establishing a clearinghouse for all data in Douglas County.

Website (www.mapacog.org)

MAPA's website contains information on its services, links to other data sites, maps, publications, reports, and the latest census information for the MAPA region.

TECHNICAL ASSISTANCE

MAPA provides a wide range of technical assistance to its 63-member governments. MAPA prepares regulations and plans, writes and administers grants, conducts community surveys, staffs committees and boards, and provides other technical services in response to the needs of the region. Selected technical assistance activities include:

Community Surveys

MAPA assists communities in preparing surveys to obtain valuable citizen input and guidance on various topics and issues. Analysis and recommendations are presented to a variety of groups including the city councils of communities. Staff also assists with the implementation of any actions deemed feasible and necessary by local communities.

Comprehensive Planning and Zoning

MAPA assists communities with developments or updates of comprehensive plans. Goal-setting sessions are held with citizens, future development plans are discussed, and data are collected to analyze current conditions of a given community.

Grant Writing and Administration

Grant applications are prepared for Community Development Block Grant (CDBG) projects, economic development projects, planning assistance, housing rehabilitation, historic preservation, transportation mobility assistance, and more. Grant writing and administration includes data compilation, income surveys, site visits, environmental assessments, and coordination with community development staffs in Nebraska and Iowa.

Hazard Mitigation Planning

Jurisdictions throughout the country are required by Federal Emergency Management Agency (FEMA) to develop and maintain hazard mitigation plans to access Hazard Mitigation Grant Program (HMGP) funding. These plans, which have a life cycle of five years, require active participation of planning committees, in-depth review of past disaster or near-disaster events, establishment of mitigation goals and objectives, and a list of mitigation actions that, if implemented, can reduce or potentially eliminate the probability of hazards (or their impacts) in jurisdictions. MAPA has prepared these plans on a multi-jurisdictional level in both Mills and Pottawattamie counties with assistance from planning committees and local stakeholders.

Historic Preservation

MAPA has successfully assisted numerous communities apply for grants through the Historic Resource Development Program in Iowa. This program funds documentary collections, museums, and historic preservation projects that preserve, interpret, and educate the public about historical resources. Grants are extremely competitive and require extensive and thorough descriptions of projects.

Jurisdictional Redistricting

MAPA assists jurisdictions throughout the region in redistricting after decennial censuses to ensure voting precincts are balanced proportionately. MAPA last assisted with redistricting in conjunction with the 2010 Census.

Mapping Activities

MAPA creates maps for regional jurisdictions and businesses for a variety of projects and initiatives. MAPA frequently develops base maps, zoning maps, location maps, site plans for

grant applications, maps for comprehensive plans, demographic analysis maps, census data maps, transportation analysis maps, parking maps, and others as requested.

MetrO! Rideshare

MetrO! Rideshare is a publicly funded carpooling matching service for individuals who commute to, from, or within the five-county MAPA region. MetrO! Rideshare helps individuals find carpooling opportunities with other commuters on-line and assists employers with transportation programs.

Ordinance Codification

Existing community codebooks are revised and updated as necessary when communities have the need for change. MAPA provides this service to regional jurisdictions as requested.

TRANSPORTATION

MAPA serves as the Metropolitan Planning Organization (MPO) for Douglas and Sarpy counties in Nebraska and the western-most portion of Pottawattamie County in Iowa. Federal transportation legislation requires that MPOs produce a Long-Range Transportation Plan, Transportation Improvement Program, and a Unified Planning Work Program (annual description of work activities). These documents are important for economic development because they show traffic trends and changes, suggested or planned road improvements, and when certain work is scheduled to be completed.

Long Range Transportation Plan

MAPA prepares this plan every five years. This process includes collecting a wide range of data, and estimating future trips, road usage, and changes in origin and destination points. Multiple public meetings are held to gather input, both after the draft is completed and again when the report is final. After MAPA's Board of Directors, Federal Highway Administration and Federal Transit Administration accept the report, it becomes the transportation planning guide for the MPO. It is reviewed every year and amended as needed.

Transportation Improvement Program

MAPA prepares this document, which identifies all street, highway, transit, airport, and trail improvements programmed in MAPA's Transportation Study Area for a six-year period.

Metro Area Motorist Assist Program (MAMA)

MAMA is an incident management program used to provide responsive assistance to motorists on the freeway/principal arterial system in the Omaha metropolitan area. Emergency vans driven by volunteers are on the road five days a week during morning and evening rush hours. The program is monitored by MAPA and the Nebraska State Patrol.

Regional Planning Affiliation-18 (RPA-18)

The State of Iowa has 18 RPAs that provide transportation planning on a regional level outside urbanized areas. MAPA serves as the facilitator for RPA-18, which is comprised of Harrison, Mills, Pottawattamie (excluding Council Bluffs), and Shelby counties in southwest Iowa.

Transportation Technical Advisory Committee (TTAC)

TTAC is tasked to provide continuing, comprehensive and coordinated transportation planning. TTAC meets bi-monthly to discuss multimodal transportation issues in the MAPA region and to forward recommendations to the MAPA Board of Directors.

REGIONAL COORDINATION

MAPA provides a forum for discussion of development issues among jurisdictions and others within the region, thereby providing the opportunity for coordination and cooperation among numerous parties. Different jurisdictions use MAPA because it is a two-state agency that can develop and/or sponsor programs that help to improve efficiency, service and quality of life without the perception of bias. Some of these activities include:

Iowa Association of Regional Councils (IARC) and Nebraska Regional Organization of Councils (NROC)

IARC and NROC are the statewide associations for the Councils of Government in Iowa and Nebraska. Executive directors of the participating organizations make up the governing board membership of both associations. The Iowa and Nebraska associations assist their member agencies in promoting economic development and finding solutions to common problems. IARC and NROC also represent their member agencies before state and federal legislative entities.

MAPA Cooperative Purchasing Program

This program combines orders from MAPA members for goods and services and then purchases items in quantity at reduced prices. The program is open to any MAPA member. Purchases generally include office and computer supplies.

MAPA Project Review Committee

This committee exists in accordance with Executive Order 12372 to provide a voluntary intergovernmental review and comment process for federal and state aid applications that impact the MAPA region.

ECONOMIC DEVELOPMENT RESOURCES IN THE MAPA REGION

Governmental jurisdictions have a variety of resources available to them to promote economic development. Agencies from all levels of government have joined forces to provide these development resources to encourage existing business growth and development, and to attract business from other areas. Business development strategies include:

FEDERAL RESOURCES

Foreign Trade Zone: The City of Omaha is the only designated Foreign Trade Zone within the MAPA region. Companies importing dutiable product into Omaha can delay the payment of duties while the product remains within the zone. When the product is transferred into American commerce, the duty on the quantity of product released becomes due. This allows the conservation of working capital. Additionally, dutiable products can be imported and exported into a Foreign Trade Zone area without incurring the duty expense.

United States Customs: Ports of entry are responsible for processing conveyances, passengers, and all goods entering and exiting the U.S. The City of Omaha is the only port of entry within the MAPA region.

STATE RESOURCES

Community Development Block Grant (CDBG): CDBG funds are allocated to states on a formula basis by the United States Department of Housing and Urban Development (HUD). The CDBG program funds community development activities such as affordable housing, anti-poverty programs and infrastructure construction. Proposed CDBG projects must conform to at least one of three broad national priorities: benefit low-to-moderate income citizens, prevent or eliminate slum or blight, or address an urgent threat to health or welfare of a community for which other funding is not available. CDBG programs in Nebraska and Iowa are administered by the Nebraska Department of Economic Development and the Iowa Economic Development Authority, respectively. The cities of Bellevue, Council Bluffs and Omaha are classified as "Entitlement Communities." These jurisdictions receive allocated CDBG funds directly from HUD, not the states.

NEBRASKA RESOURCES

Nebraska Advantage Act: Provides a series of tax benefits to businesses in Nebraska. Those benefits include the Customized Job Training Program, Research and Development Tax Credits, Microenterprise Tax Credits, sales tax exemptions on machinery and equipment purchases, and property tax exemptions on inventory. Incentives vary by job creation targets and new investment levels, with different thresholds for rural business enterprises.

Customized Job Training Program: Provides employee training assistance to businesses that maintain, expand and diversify Nebraska's economic base. Training assistance is limited primarily to businesses engaged in activities that sell to non-Nebraska markets. Examples of eligible businesses include manufacturing, processing, distribution, and headquarter operations. Funding can only be used for training full-time employees not involved in administrative support, management or facilities maintenance.

Local Option Municipal Development Act: Authorizes incorporated cities and villages in Nebraska to collect and appropriate local tax dollars (sales and/or property) for economic development purposes. Local voters must first approve the use of local tax dollars before provisions of the plan are implemented.

IOWA RESOURCES

The Iowa Values Fund (IVF) is the state's 10-year economic development program designed to transform Iowa's economy by creating high quality jobs through business development and expansion. With a \$35 million dollar annual appropriation for business development and marketing, the IVF assists existing Iowa companies expand and attract new businesses to the state. A variety of business development programs are available through the IVF as listed below:

Community Economic Betterment Account / Economic Development Set-Aside: Provides financial assistance to companies that create new quality employment opportunities and/or retain existing jobs, and make new capital investment in Iowa. The set-aside program is targeted toward low- and moderate-income individuals.

Loan and Credit Guarantee Fund: Designed to assist businesses that might not have access to conventional financing. The fund provides lenders with additional security, thereby encouraging greater lender activity to Iowa businesses.

Value-Added Agricultural Products and Processes Financial Assistance Program: Provides support and business incentives to Iowa farmers and agribusiness entrepreneurs. The program is designed to speed the rate of agriculture-based innovations in food and fiber products, and to encourage organization of new ventures to produce those innovations.

High Quality Job Creation Program: Designed to promote the creation of quality jobs by assisting businesses locating, expanding or modernizing their facilities in Iowa through a package of tax credits, exemptions, and/or refunds to approved businesses.

Targeted Jobs Withholding Tax Credit Pilot Program: Allows the diversion of withholding funds paid by an employer to be matched by a designated "pilot" city to create economic incentives that can be directed toward the growth and expansion of targeted businesses located within Urban Renewal Areas.

Physical Infrastructure Assistance Program: Designed to financially assist capital-intensive infrastructure projects that create unique opportunities for quality, high-wage jobs and demonstrate a statewide impact. Iowa communities and new or existing businesses are eligible for assistance. This program may also be used to remediate contaminated sites that have potential development opportunities contingent on cleanup. Assistance is provided in the form of loans, forgivable loans and cost indemnification agreements.

Public Facilities Set-Aside: Provides financial assistance to cities with less than 50,000 in population and to counties for public infrastructure improvements that enable businesses to create new job opportunities. Projects that create manufacturing jobs, add value to Iowa resources and/or increase out-of-state exports are given priority. Eligible projects include adding or improving sanitary sewer systems, water systems, streets, roads, and storm sewers.

Iowa Industrial New Jobs Training Program: Provides no-cost or reduced-cost job-training services to new employees of eligible businesses through Iowa's community college system.

Iowa Jobs Training Program: Provides job training services to current employees of eligible businesses that are located in Iowa.

New Jobs Tax Credit: When businesses enter into an agreement under the Iowa New Jobs Training Program, they may qualify for this additional credit to their Iowa corporate income tax.

Targeted Small Business Program: Designed to create and expand minority- or women-owned businesses through direct loans.

Self-Employment Loan Program: Offers low-interest loans to low-income owners of new or expanding small businesses.

Entrepreneurs with Disabilities: Helps qualified business owners with disabilities establish, acquire, maintain or expand their small business by providing technical and financial assistance.

Assistive Device Tax Credit: Reduces taxes for small businesses that incur costs by making physical changes to the workplace to help employees or prospective employees with disabilities.

LOCAL RESOURCES

Revolving Loan Funds (RLF): The RLF is a valuable economic development tool that offers low or no interest loans to industrial, commercial, manufacturing, and service industries for expansion or diversification. Typically these projects include the retention and/or creation of jobs. Upon payback of the funds, principal and interest, they are returned to the RLF pool. These funds can then be “revolved” by loaning them to other projects.

Tax Increment Financing (TIF) Districts: TIF is available to communities in both Nebraska and Iowa. In Iowa, counties are allowed to utilize TIF as an economic development resource. During the years a TIF district is in effect, the property tax base or equalized assessed valuation is frozen. The potential increase in property tax revenue resulting from the increased value of the property after development is the tax increment. This increment can then be used to finance public sector costs associated with development and may be used to finance the private sector costs.

Table 1 on Page 19 identifies which jurisdictions offer RLF and TIF financing and other incentives.

Urban Revitalization (Tax Abatement): Provided to stabilize and revitalize areas by using economic incentives to attract new development and help existing businesses. These zones are set up by a city and are not subject to approval by the state.

LOCAL ECONOMIC DEVELOPMENT ENTITIES

The following are economic development entities sorted by county in the MAPA region.

Douglas County

- **Greater Omaha Chamber of Commerce:** Serves the eight-county Omaha-Council Bluffs Metropolitan Statistical Area.
- **Western Douglas County Chamber of Commerce:** Serves western Douglas County including the communities of Bennington, Waterloo, Valley, and west Omaha.
- **City of Omaha Economic Development:** The City of Omaha maintains economic development staff tasked with creating/retaining jobs and supporting/growing the local tax base.

Sarpy County

- **Bellevue Chamber of Commerce:** Exclusively serves the City of Bellevue.
- **Sarpy County Economic Development Corporation:** Serves Sarpy County and is located in the office of the Greater Omaha Chamber of Commerce.
- **Sarpy County Chamber of Commerce:** Serves greater Sarpy County and the communities of Bellevue, Gretna, La Vista, Papillion, and Springfield.

Washington County

- **Blair Area Chamber of Commerce:** Exclusively serves the City of Blair.
- **Gateway Development Corporation:** Serves Washington County and is located in the office of the Greater Omaha Chamber of Commerce.

Mills County

- **Glenwood Area Chamber of Commerce / Mills County Economic Development Foundation:** Both entities serve the Glenwood and greater Mills County areas.

Pottawattamie County

- **Council Bluffs Chamber of Commerce:** Serves the Council Bluffs area.
- **Pottawattamie County Growth Alliance:** Coordinates economic development efforts in the Council Bluffs area.
- **Western Iowa Development Association:** Assists individuals and businesses to locate and develop business opportunities in western Iowa.

Multi-County Entities in Iowa

- **Greater Council Bluffs Regional Economic Development Partnership:** Partnership of local government agencies, businesses and economic development groups that include the Pottawattamie County Growth Alliance, Glenwood/Mills County Economic Development Foundation, and Western Iowa Development Association.
- **Southwest Iowa Coalition:** Coalition of 16 southwest Iowa counties that operates a regional revolving loan fund and deals with issues relating to transportation, housing, telecommunications, tourism, value-added agriculture, rural water, workforce development, and regional marketing.

TABLE 1 – Economic Development Incentive Programs

Jurisdiction	Tax Increment Financing	Tax Credits/ Abatement	Revolving Loan Fund	Other
State of Nebraska		X		Various grant and loan programs
Douglas Co.	X			
Omaha	X		X	
Ralston	X		X	
Waterloo	X			
Sarpy Co.			X	
Bellevue	X		X	
La Vista			X	
Washington Co.			X	
Blair	X		X	
State of Iowa		X		Various grant and loan programs
Mills Co.	X			
Glenwood	X			
Malvern	X			
Pottawattamie Co.	X	X		5 Year Industrial Tax Exemption
Avoca	X	X		
Carson	X			
Carter Lake	X			
Council Bluffs	X	X		Enterprise Zone- Sales tax refunds on construction
Minden	X			
Neola	X			
Oakland	X			
Treynor	X			
Underwood	X		X	
Walnut	X			

Source: Local economic development agencies; individual communities

SECTION II

MAPA REGION DEMOGRAPHICS & STATISTICS

OVERVIEW

Economic development is an important element in planning. It is a tool used to foster job creation, increase wages and local tax bases, and strengthen the overall condition of the workforce. This section examines data and conditions useful in assessing the MAPA region's economy. Economic components discussed include population, education, labor force and employment, transportation, utilities, agriculture, and natural resources. There are a number of tables and charts in this section to enable readers to visualize the presented information.

POPULATION

2010 population data shows that the MAPA region experienced positive growth since the last decennial census in 2000. The region grew overall by 13.7 percent, or by 97,091 residents. All MAPA counties saw positive population growth but Sarpy County's was most dramatic with a 29.6 percent increase since 2000. Mills County, which is the least populous county in the region, had the most modest increase at 3.5 percent. Table 2 compares 2000 and 2010 census population counts for each county in the region, the MAPA region as a whole, the MSA, Nebraska and Iowa, and the U.S.

TABLE 2 – 2000 & 2010 Census Population Comparisons

Jurisdiction	2000 Population	2010 Population	2000 – 2010 # Change	2000 – 2010 % Change
Nebraska	1,711,263	1,826,341	115,078	6.7%
Douglas Co.	463,585	517,110	53,525	11.6%
Sarpy Co.	122,595	158,840	36,245	29.6%
Washington Co.	18,780	20,234	1,454	7.7%
Iowa	2,926,324	3,046,355	120,301	4.1%
Mills Co.	14,547	15,059	512	3.5%
Pottawattamie Co.	87,803	93,158	5,355	6.1%
MAPA Region	707,310	804,401	97,091	13.7%
Omaha NE-IA MSA	767,041	865,350	98,309	12.8%
U.S.	281,421,906	308,745,538	27,323,632	9.7%

Note: 49.3% of the MAPA region's total population is male; 50.7% is female
Source: U.S. Census Bureau

There are 38 cities or villages in the MAPA region. Table 3 shows the 2000 and 2010 population counts for those communities and the percent change. Population decline occurred in 16 communities, 12 of which are located in the region's Iowa counties.

TABLE 3 – 2000 & 2010 Census Population Comparisons for Cities & Villages

Jurisdiction		2000 Population	2010 Population	2000 – 2010 # Change	2000 – 2010 % Change
Douglas County	Bennington	937	1,458	521	55.6%
	Boys Town	818	745	(73)	(8.9%)
	Omaha*	390,007	408,958	18,951	4.9%
	Ralston	6,314	5,943	(371)	(5.9%)
	Valley	1,788	1,875	87	4.9%
	Waterloo	459	848	389	84.7%
Sarpy County	Bellevue	44,382	50,137	5,755	13.0%
	Gretna	2,355	4,441	2,086	88.6%
	La Vista	11,699	15,758	4,059	34.7%
	Papillion*	16,363	18,895	2,531	15.5%
	Springfield	1,450	1,529	79	5.4%
Washington County	Arlington	1,197	1,243	46	3.8%
	Blair*	7,512	7,990	478	6.4%
	Fort Calhoun	856	908	52	6.1%
	Herman	310	268	(42)	(13.5%)
	Kennard	371	361	(10)	(2.7%)
	Washington	126	150	24	19.0%
Mills County	Emerson	480	438	(42)	(8.8%)
	Glenwood*	5,358	5,269	(89)	(1.7%)
	Hastings	214	152	(62)	(29.0%)
	Henderson	171	185	14	8.2%
	Malvern	1,256	1,142	(114)	(9.1%)
	Pacific Junction	507	471	(36)	(7.1%)
	Silver City	259	245	(14)	(5.4%)
	Tabor (part)^	60	84	24	40.0%
Pottawattamie County	Avoca	1,610	1,506	(104)	(6.5%)
	Carson	668	812	144	21.6%
	Carter Lake	3,248	3,785	537	16.5%
	Council Bluffs*	58,268	62,230	3,962	6.8%
	Crescent	537	617	80	14.9%
	Hancock	207	196	(11)	(5.3%)
	Macedonia	325	246	(79)	(24.3%)
	McClelland	129	151	22	17.1%
	Minden	564	599	35	6.2%
	Neola	845	842	(3)	(0.4%)
	Oakland	1,487	1,527	40	2.7%
	Shelby (part)^	64	23	(41)	(64.1%)
	Treynor	950	919	(31)	(3.3%)
	Underwood	688	917	229	33.3%
Walnut	877	785	(92)	(10.5%)	

*County seat

^Portions of Tabor and Shelby extend into Mills and Pottawattamie counties but primarily exist in neighboring counties outside the MAPA region.

Source: U.S. Census Bureau

Though the region's population continues to trend upward, more people are locating to unincorporated areas. Roughly 24 percent of the region's residents live outside of urbanized areas, up 5 percent from 2000. Douglas County's population growth in 2010 largely occurred outside of Omaha and the other incorporated jurisdictions. Mills County, though not a highly urbanized county, actually had an incorporated population decline between 2000 and 2010. Only Pottawattamie County had a higher population growth rate in urbanized areas. See Table 4 below for incorporated-unincorporated growth trends by county.

TABLE 4 – Incorporated / Unincorporated Population

Jurisdiction	1990 Census	2000 Census	2010 Census	1990-2000 # Change	2000-2010 # Change	1990-2000 % Change	2000-2010 % Change
Douglas County							
Incorporated	347,267	406,385	419,827	59,188	13,442	17.0%	3.3%
Unincorporated	69,177	57,200	97,283	(11,977)	40,083	(17.3%)	70.1%
Sarpy County							
Incorporated	54,821	76,249	90,759	21,428	14,510	39.1%	19.0%
Unincorporated	47,762	46,346	68,081	(1,416)	21,735	(3.0%)	46.9%
Washington County							
Incorporated	9,438	10,372	10,920	934	548	9.9%	5.3%
Unincorporated	7,169	8,408	9,314	1,239	906	17.3%	10.8%
Mills County							
Incorporated	7,932	8,305	7,902	373	(403)	4.7%	(4.9%)
Unincorporated	5,270	6,242	7,157	972	915	18.4%	14.7%
Pottawattamie County							
Incorporated	66,068	70,467	75,132	4,300	4,665	6.5%	6.6%
Unincorporated	16,560	17,336	18,026	776	690	4.7%	3.9%

Source: U.S. Census Bureau

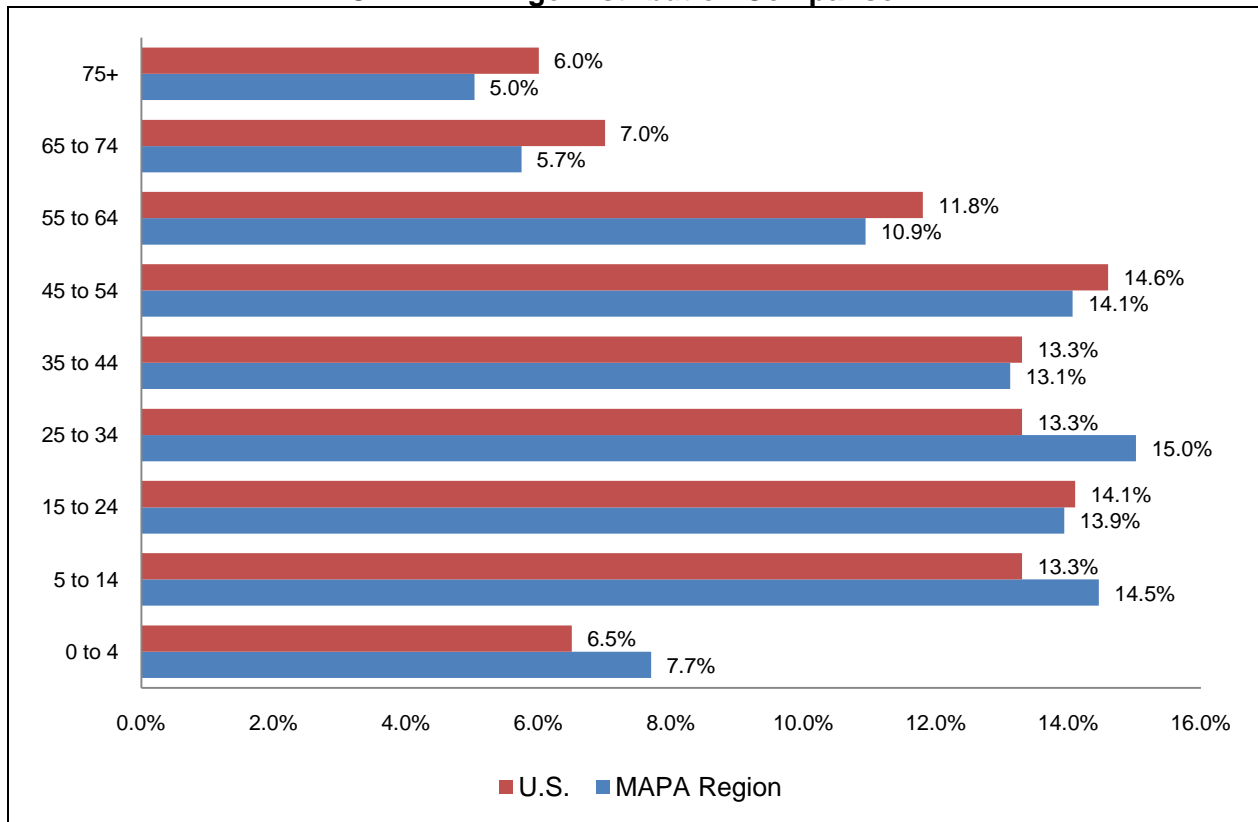
Table 5 below breaks out county population totals by age distribution. Chart 1 on the preceding page compares the age distribution of the MAPA region as a whole with the U.S.

TABLE 5 – Population by Age Distribution

Age Range	Douglas		Sarpy		Washington		Mills		Pottawattamie	
	#	%	#	%	#	%	#	%	#	%
75+	26,392	5.1%	5,396	3.4%	1,332	6.6%	919	6.1%	6,411	6.9%
65 to 74	28,483	5.5%	8,148	5.1%	1,509	7.5%	1,104	7.3%	6,922	7.4%
55 to 64	55,648	10.8%	15,562	9.8%	2,761	13.6%	2,260	15.0%	11,718	12.6%
45 to 54	70,478	13.6%	22,670	14.3%	3,399	16.8%	2,512	16.7%	14,068	15.1%
35 to 44	67,026	13.0%	22,796	14.4%	2,507	12.4%	1,911	12.7%	11,285	12.1%
25 to 34	81,193	15.7%	24,504	15.4%	2,010	9.9%	1,577	10.5%	11,547	12.4%
15 to 24	74,138	14.3%	21,139	13.3%	2,618	12.9%	1,665	11.1%	12,544	13.5%
5 to 14	73,761	14.2%	25,248	15.9%	2,903	14.3%	2,153	14.3%	12,345	13.3%
0 to 4	40,081	7.8%	13,377	8.4%	1,195	5.9%	958	6.4%	6,318	6.8%
Median Age	33.5		32.9		40.8		41.2		38.5	

Source: U.S. Census Bureau

CHART 1 – Age Distribution Comparison



Source: U.S. Census Bureau

Generally, the MAPA region is becoming more youthful. Individuals between the ages of 25 to 34 represent 15 percent of the region’s total population. The age cohorts of 4 and under and 5 to 14 have risen steadily, outpacing national trends. In addition, the MAPA region has a smaller proportion of individuals 65 years and over than the national average. The influx of youth can be partially attributed to individuals deciding to return home after time spent away in college or elsewhere. There is also quantitative and anecdotal evidence to suggest that younger couples are returning to the region to start families due to available job opportunities, low cost of living, and perceived intangibles such as high quality of life.

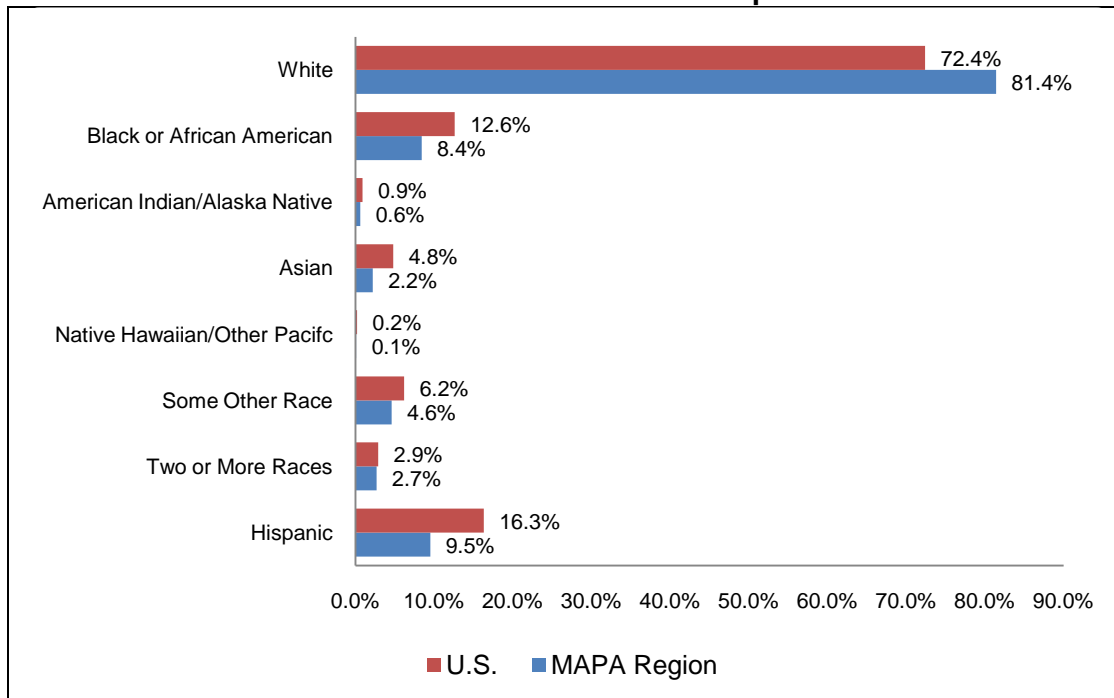
The MAPA region's population is predominately white with concentrations of minorities located in higher density urban areas. Table 6 shows the racial distribution of races for all MAPA counties. The MAPA region has a minority population of 18.6 percent, though 73.6 percent of minorities are located in the City of Omaha. The region as a whole has a Hispanic population of 9.5 percent, which almost doubled from 39,743 people in 2000 to 76,302 in 2010. All MAPA region counties had significant growth in their Hispanic populations during the last decennial census. Chart 2 provides an illustration of how the MAPA region's racial composition compares to the U.S.

TABLE 6 – Population by Race

Race	Douglas		Sarpy		Washington		Mills		Pottawattamie	
	#	%	#	%	#	%	#	%	#	%
White	395,025	76.4%	138,879	87.4%	19,673	97.2%	14,639	97.1%	86,558	92.9%
Black or African American	60,071	11.6%	6,321	4.0%	122	0.6%	57	0.4%	1,267	1.4%
Native American/Alaskan										
Native	3,731	0.7%	733	0.5%	44	0.2%	49	0.3%	441	0.5%
Asian	13,755	2.7%	3,353	2.1%	54	0.3%	55	0.4%	570	0.6%
Native Hawaiian/Other Pacific	394	0.1%	168	0.1%	8	0.0%	10	0.1%	27	0.0%
Some Other Race	29,645	5.7%	4,426	2.8%	136	0.7%	84	0.6%	2,525	2.7%
Two or More Races	14,489	2.8%	4,960	3.1%	197	1.0%	165	1.1%	1,770	1.9%
Hispanic	57,804	11.2%	11,569	7.3%	419	2.1%	359	2.4%	6,151	6.6%
Not Hispanic	459,309	88.8%	147,271	92.7%	19,815	97.9%	14,700	97.6%	87,007	93.4%

Source: U.S. Census Bureau

CHART 2 – Race Distribution Comparison



Source: U.S. Census Bureau

HOUSEHOLDS

A *household* is defined as including all people who occupy a housing unit as their usual place of residence. A *family household* is defined as a householder living with one or more people related by birth, marriage, or adoption. A *non-family household* is defined as a householder living alone or with nonrelatives only (e.g. foster children, domestic partners). Table 7 provides 2010 census household data by jurisdiction.

TABLE 7 – 2010 Household Data

Jurisdiction	Total Households	Family Households	% Family Household	Non-family Households	% Non-family Household	Average Household Size
U.S.	116,716,292	77,538,296	66.4%	39,177,996	33.6%	2.58
Nebraska	721,130	467,206	64.8%	253,924	35.2%	2.46
Douglas Co.	202,411	125,614	62.1%	76,797	37.9%	2.49
Sarpy Co.	58,102	42,509	73.2%	15,593	26.8%	2.71
Washington Co.	7,761	5,642	72.7%	2,119	27.3%	2.54
Iowa	1,221,576	790,034	64.7%	431,542	35.3%	2.41
Mills Co.	5,605	4,093	73.0%	1,512	27.0%	2.58
Pottawattamie Co.	36,775	24,515	66.7%	12,260	33.3%	2.48
MAPA Region	310,654	202,373	65.1%	108,281	34.9%	2.56

Source: U.S. Census Bureau

The proportion of family households in the MAPA region is slightly above the state rates of Nebraska and Iowa and slightly below the national average. The same is observable for average household size in the region. Of family households in the region, 48.7 percent have related children under 18 years of age. Rates of households with related children for each county are as follows: Douglas County (30.5%), Sarpy County (38.4%), Washington County (31.9%), Mills County (31.1%), and Pottawattamie County (28.3%).

Sarpy County has the highest proportion of family households with children in the region. This is likely attributed to the migration of families out of Omaha – Douglas County has the largest proportion of non-family households in the region at 37.9 percent, above state and national averages. Sarpy County’s growth in family households can be further quantified by the upswing in single-family homes (see “Housing” in Section III).

EDUCATION

In recent decades, the importance of education has increased in tandem with the growth of technology and knowledge-intensive activities. Perhaps more so than ever, an educated workforce is critical to the maintenance of a dynamic local economy and is an important aspect of local competitiveness. Local employers require access to a reliable and skilled workforce. For local governments, a well-trained and educated workforce is important in attracting potential employers that may be looking for communities in which to invest.

There are 24 public school districts in the MAPA region, both urban and rural. In addition, there are a number of parochial schools and a variety of post-secondary institutions. Table 8 below lists public and select private school districts in the MAPA region and enrollment figures over the last two academic years for those districts. Current enrollment figures of select post-secondary institutions are provided in Table 9.

TABLE 8 – Public / Private School Districts & Enrollment

School District	# Enrolled 2011-2012	# Enrolled 2012-2013	% Change
Douglas County			
Bennington Public Schools	1,490	1,585	6.4%
Douglas County West Community Schools	716	743	3.8%
Elkhorn Public Schools	6,059	6,459	6.6%
Millard Public Schools	23,068	23,395	1.4%
Omaha Public Schools	50,372	50,559	0.4%
Ralston Public Schools	3,103	3,135	1.0%
Westside Community Schools	5,964	6,051	1.5%
Sarpy County			
Bellevue Public Schools	9,987	10,066	0.8%
Gretna Public Schools	3,280	3,469	5.8%
Papillion-La Vista Public Schools	10,339	10,737	3.8%
Springfield Platteview Community Schools	1,026	1,021	(0.5%)
Washington County			
Arlington Public Schools	569	553	(2.8%)
Blair Community Schools	2,326	2,325	0.0%
Fort Calhoun Community Schools	588	614	4.4%
Mills County			
East Mills Community Schools	507	493	(2.8%)
Glenwood Community Schools	2,011	2,021	0.5%
Pottawattamie County			
A-H-S-T Community Schools	526	539	2.5%
Council Bluffs Community Schools	8,529	8,514	(0.2%)
Lewis Central Community Schools	3,075	3,087	0.4%
Riverside Community Schools	588	584	(0.7%)
Treynor Community Schools	758	774	2.1%
Tri-Center Community Schools	705	712	1.0%
Underwood Community Schools	755	739	(2.1%)
Walnut Community Schools	147	125	(15.0%)
Private/Parochial Schools			
Archdiocese of Omaha (Douglas & Sarpy counties*)	14,676	14,671	0.0%
Boys Town Schools (Omaha)	377	338	(10.3%)
Brownell Talbot Schools (Omaha)	457	433	(5.3%)
Concordia Lutheran Schools of Omaha	460	472	2.6%
Cornerstone Christian Schools (Bellevue)	139	220	58.3%
Omaha Christian Academy	262	285	8.8%
Saint Albert Catholic Schools (Council Bluffs)	Not available	727**	--

*Excludes schools that are not located in the MAPA region

**Number enrolled is from 2009-2010 academic year (no current enrollment data are available)

Source: Iowa Department of Education; Nebraska Department of Education; National Center for Education Statistics

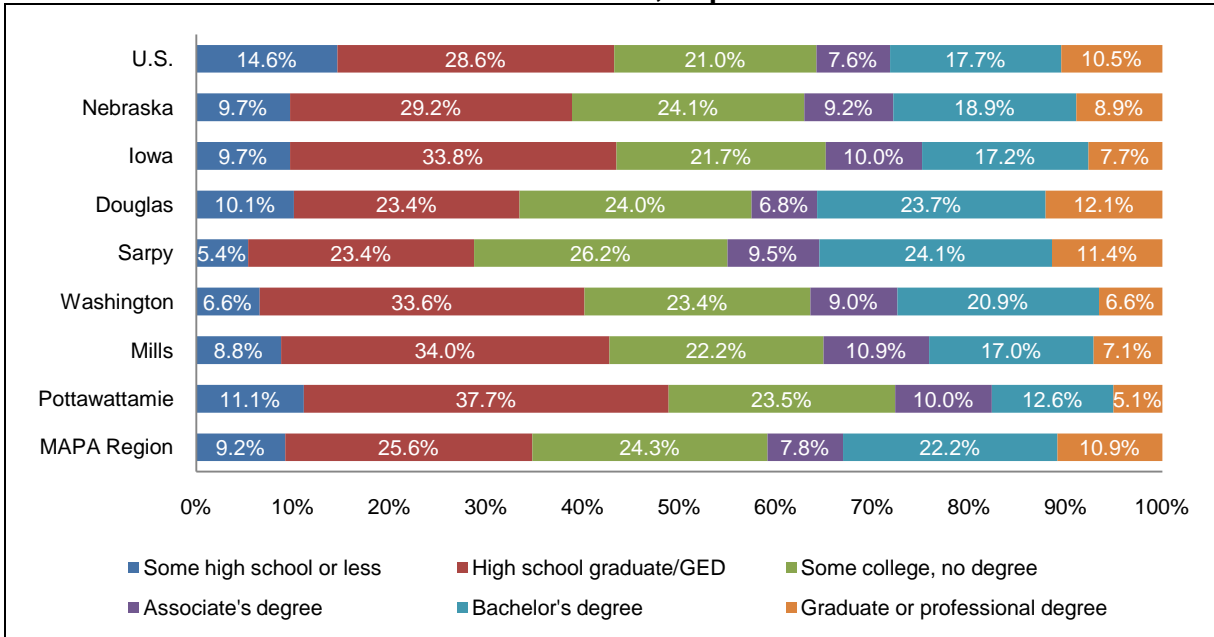
TABLE 9 – Post-Secondary Education Institutions & Enrollment

Institution	Location	# Enrolled Fall 2012
Not-for-profit		
Bellevue University	Bellevue	9,942
Clarkson College	Omaha	1,204
College of Saint Mary	Omaha	1,037
Creighton University	Omaha	7,736
Grace University	Omaha	439
Iowa Western Community College	Council Bluffs	7,367
Metropolitan Community College	Omaha	17,376
Nebraska Methodist College	Omaha	878
University of Nebraska at Omaha	Omaha	14,786
University of Nebraska Medical Center	Omaha	3,655
For-profit		
The Creative Center	Omaha	109
ITT Technical Institute	Omaha	597
Kaplan University	Omaha/Council Bluffs	865
University of Phoenix	Omaha	71
Vatterott College	Omaha	405

Source: National Center for Education Statistics

Educational attainment in the MAPA region is generally in line with national averages. For the population 25 years of age and over, 90.8 percent have attained at least a high school education or equivalent, higher than the national rate of 85.4 percent. The region's proportion of the population with at least a bachelor's degree, 33.1 percent, is also higher than the national rate of 28.2 percent. Chart 3 below illustrates educational attainment by jurisdiction.

CHART 3 – Educational Attainment, Population 25 Years & Over



Source: 2007-2011 American Community Survey 5-Year Estimates

Education levels correlate with per capita personal income levels and many jobs today require advanced skills to receive a higher wage. This is not to say that every individual needs to have an advanced education but the association is very real.

LABOR FORCE & EMPLOYMENT

Labor force is defined as the population of persons employed and those looking for and available to work. The total labor force in the MAPA region grew from 423,056 to 431,015, an increase of 1.8 percent between 2008 and 2012. Table 10 below shows employment totals and average annual pay in 2012, compared to the balance of the U.S.

TABLE 10 – Employment & Annual Wage

Jurisdiction	Labor Force	Employment	Average Annual Pay	% of U.S.
U.S.	154,975*	142,469*	\$49,289	100.0%
MAPA Region	431,015	411,923	\$40,676	82.5%
Douglas Co.	281,254	268,459	\$45,051	91.4%
Sarpy Co.	84,010	80,565	\$39,080	79.3%
Washington Co.	11,281	10,859	\$48,047	97.5%
Mills Co.	7,450	7,160	\$36,345	73.7%
Pottawattamie Co.	47,020	44,880	\$34,856	70.7%

*Number in thousands

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Douglas County constitutes 65.3 percent of the MAPA region's labor force. The remaining shares of the local labor force are as follows: Sarpy County (19.5%), Washington County (2.6%), Mills County (1.7%), and Pottawattamie County (10.9%).

Average annual pay for the region as a whole and all individual MAPA counties are below the national average. Due to the large number employed and concentration of diverse employment opportunities, Douglas County is closer to the national average than less urbanized counties. However, Washington County, which is largely rural, is the closest to the U.S. at 97.5 percent the national average. Washington County's high average annual pay is likely contributed to the presence of Cargill and Novozymes, two international companies that require highly trained and educated professionals.

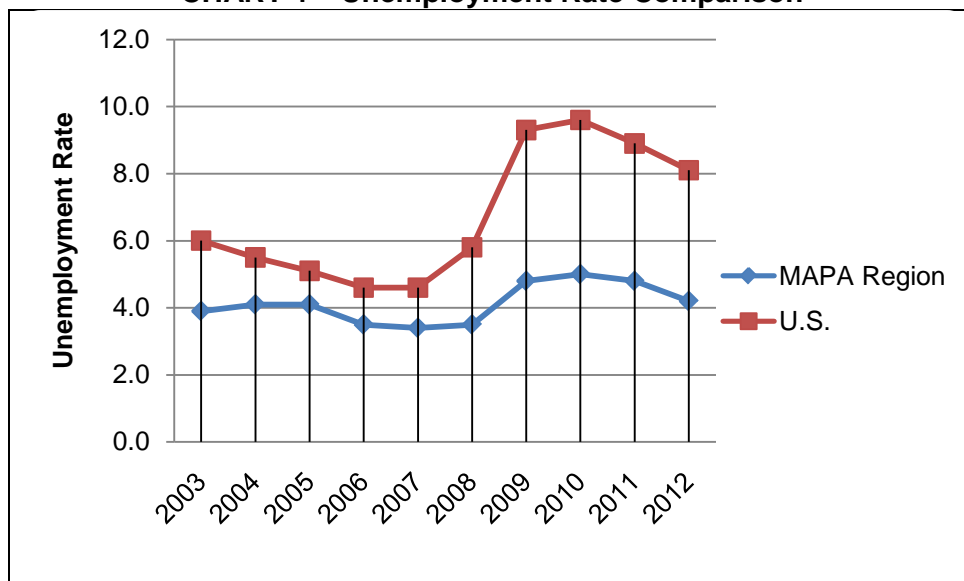
Table 11 shows unemployment rates by county in the MAPA region from 2009 to 2012. The MAPA region and all member counties experienced significantly lower unemployment rates in that period compared to national averages. Chart 4 illustrates that the region's low unemployment compared to U.S. has been a trend over time. The Omaha area has not experienced any dramatic spikes in unemployment, even when the national average hovered near 10 percent during the economic recession at the end of the last decade.

TABLE 11 – Jurisdictional Unemployment Rates

Jurisdiction	Unemployment Rate (%)			
	2009	2010	2011	2012
U.S.	9.3	9.6	8.9	8.1
Nebraska	4.7	4.7	4.4	3.9
Iowa	6.2	6.3	5.9	5.2
MAPA Region	5.0	5.2	5.0	4.4
Douglas Co.	5.2	5.4	5.1	4.5
Sarpy Co.	4.7	4.8	4.6	4.1
Washington Co.	4.6	4.8	4.5	3.7
Mills Co.	4.5	4.5	4.5	3.9
Pottawattamie Co.	5.0	5.3	5.2	4.6

Source: U.S. Bureau of Labor Statistics

CHART 4 – Unemployment Rate Comparison



Source: U.S. Bureau of Labor Statistics

Many mainstream economists have identified 4.0 percent unemployment as an acceptable level of unemployment. In nearly all economies, there will be some proportion of unemployable persons due to lack of education, criminal background, medical condition, and so on. What Chart 4 does not signify is the prevalence of underemployed workers in the Omaha area, those who are overqualified for their current positions or those who cannot find full-time work. Previous labor impact studies performed by the Greater Omaha Chamber of Commerce have shown underemployment in the Omaha area is between 20 to 25 percent.

Though the MAPA region as a whole has enjoyed historically low unemployment, much of North Omaha continues to endure significantly high unemployment and general economic distress despite the positive conditions and trends occurring elsewhere in the city and region. According to the 2011 American Community Survey, the average unemployment rate of 21 census tracts that comprise part of North Omaha is 16.8 percent². Of the 21 census tracts referenced, 6 tracts have over 20 percent unemployment. The high unemployment of the North Omaha area is often overlooked and clouded by the robust economic indicators in other areas of the city.

² The boundaries of North Omaha vary depending on the source. For the purpose of determining unemployment in North Omaha, the study area boundaries identified by Greater Omaha Chamber of Commerce's North Omaha Development Study (2007) were adopted. According to the study, North Omaha is bounded by Sorensen Parkway/Storz Expressway to the north, Cuming Street to the South, 52nd Street to the west, and 16th Street to the east.

Over 20,000 business establishments provide jobs throughout the MAPA region; Table 12 lists the number of business establishments by county (including payroll) in 1990 and 2010. Table 13 lists the top 50 employers in the region as identified by the Greater Omaha Chamber of Commerce. Each of the employers listed employs at least 1,000 persons.

TABLE 12 – Number of Business Establishments

Jurisdiction	1990		2010		% Change 1990-2010
	Number of Establishments	Payroll (\$1,000)	Number of Establishments	Payroll (\$1,000)	
Douglas Co.	12,450	4,854,691	14,962	13,363,227	20.2%
Sarpy Co.	1,429	422,303	3,125	1,431,710	118.7%
Washington Co.	411	52,277	537	232,525	30.7%
Mills Co.	230	47,492	290	58,093	26.1%
Pottawattamie Co.	1,782	349,807	1,998	925,999	12.1%
MAPA Region	16,302	5,726,570	20,912	16,011,554	28.3%

Source: U.S. Census Bureau, 2010 County Business Patterns; Greater Omaha Chamber of Commerce

TABLE 13 – Top 50 MAPA Region Employers

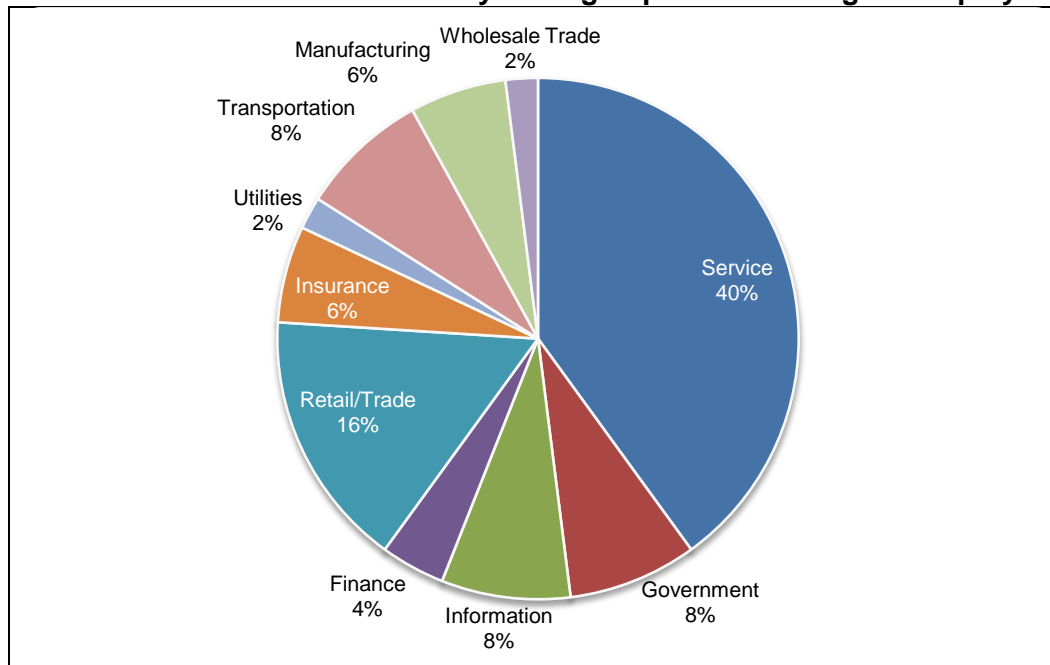
Employer	Product/Service	Industry
1. Offutt Air Force Base	National Security	Government
2. Alegent Creighton Health	Healthcare	Service
3. Omaha Public Schools	Education	Service
4. Methodist Health Center	Healthcare	Service
5. The Nebraska Medical Center	Healthcare	Service
6. University of Nebraska Medical Center	Healthcare	Service
7. First Data Corp.	Transaction Processing	Information
8. Union Pacific	Railroad	Transportation
9. Hy-Vee Inc.	Grocery Store	Retail Trade
10. First National Bank of Nebraska	Banking	Finance
11. West Corp.	Customer Service	Service
12. Walmart Stores	Department/Grocery Store	Retail Trade
13. ConAgra Foods	Food Products	Manufacturing
14. Mutual of Omaha	Insurance	Insurance
15. Creighton University	Education	Service
16. University of Nebraska at Omaha	Education	Service
17. Millard Public Schools	Education	Service
18. City of Omaha	Administration	Government
19. PayPal Inc.	Transaction Processing	Information
20. Omaha Public Power District	Energy	Utilities
21. Baker's Supermarkets Inc.	Grocery Store	Retail Trade
22. Omaha Steaks	Food Products	Retail Trade
23. Omaha World-Herald	Newspaper	Information
24. Target Stores District Office	Department/Grocery Store	Retail Trade
25. Douglas County	Administration	Government
26. Nebraska Furniture Mart	Furniture Store	Retail Trade
27. TD Ameritrade	Brokerage	Finance
28. Metropolitan Community College	Education	Service
29. Oriental Trading Co., Inc.	Party Supplies	Wholesale Trade
30. Omaha Airport Authority	Airport Management	Transportation
31. U.S. Postal Service- Omaha	Postal Service	Transportation
32. Simmonds Restaurant Management, Inc.	Restaurants	Service
33. Papillion-La Vista Schools	Education	Service
34. Children's Hospital & Medical Center	Hospitals	Service
35. Horseshoe Casino	Hotel & Gaming	Service

36. Valmont Industries	Equipment	Manufacturing
37. Boys Town	Residential Facility	Service
38. Bellevue Public Schools	Education	Service
39. Lozier Corp.	Retail Fixtures	Manufacturing
40. Werner Enterprises Inc.	Long Haul Trucking	Transportation
41. Ameristar Casino Hotel	Hotel & Gaming	Service
42. Godfather's Pizza Inc.	Restaurants	Service
43. Marriott Global Reservation & Customer Care	Travel Reservations	Service
44. CSG Systems International, Inc.	Data Solutions	Information
45. Walgreen's	Pharmacy	Retail Trade
46. Blue Cross & Blue Shield of Nebraska	Insurance	Insurance
47. Cutchall Management Co.	Restaurants	Service
48. Physicians Mutual	Insurance	Insurance
49. Sears	Department Store	Retail Trade
50. U.S. Army Corps of Engineers	Public Works	Government

Source: Greater Omaha Chamber of Commerce

Many of the companies/institutions listed above have had a constant presence on previous major employer listings, both for the MAPA region and the MSA. Healthcare, education and government are heavily represented. It is important to note that several of the area's top employers are tax exempt organizations (e.g. Offutt Air Force Base, public school districts, universities, utility districts, etc.) and therefore do not provide the jurisdictions they operate in any tax revenue. Distribution of industry among the top 50 MAPA region employers is illustrated in Chart 5.

CHART 5 – Distribution of Industry among Top 50 MAPA Region Employers



Source: Greater Omaha Chamber of Commerce

As Chart 5 above illustrates, service is the dominant industry of the region's major employers. Among the employers that are categorized in the service industry, 60 percent are affiliated with education or healthcare. Retail/trade is the second most prevalent source of employment in the region at 16 percent while finance, government, information, insurance, manufacturing, transportation, utilities, and wholesale trade constitute between 2 and 8 percent.

Table 14 lists the top 10 major employers for all five MAPA counties. Education and healthcare are heavily represented among the employers listed below, especially in Douglas County. The region's largest employer, Offutt Air Force Base, is located in Sarpy County. Washington County has three employers based in information/communications. Mills County has a high concentration of assisted living facilities which provide employment opportunities.

TABLE 14 – Major Employers by County

Douglas Co.	Sarpy Co.	Washington Co.	Mills Co.	Pottawattamie Co.*
Alegent Creighton Health	Offutt Air Force Base	Woodhouse Auto Group	Glenwood Resource Center	ConAgra Foods
Omaha Public Schools	PayPal Inc.	HunTel Systems, Inc.	Glenwood Community School District	Council Bluffs Community Schools
Methodist Health Center	Bellevue Public Schools	Cargill, Inc.	Five Star Quality Care	Hy-Vee Inc.
The Nebraska Medical Center	Werner Enterprises Inc.	Memorial Community Hospital & Health System	Bunge North America	Mercy Hospital
University of Nebraska Medical Center	Papillion-La Vista Public Schools	Wilkinson Industries	Mills Co.	Methodist Jennie Edmundson Hospital
First Data Corp.	Infogroup	Blair Community Schools	East Mills Community School District	MidAmerican Energy Company
Union Pacific	Bellevue University	Mid America Computer Corp.	Glen Haven & Linnwood Estates	OSI Industries
Hy-Vee Inc.	Ehrling Bergquist Clinic	CON-E-CO	Mills Co. YMCA & Community Center	Packers Sanitation Services
First National Bank	Hillcrest Health Systems	Great Plains Communications	A&M Green Power	Sapp Brothers Truck Stop Inc.
West Corp.	Oriental Trading Co. Inc.	Johansen Manor Retirement Community	On With Life	Walmart Stores

*Ranked alphabetically, not by number of employees

Source: Iowa Workforce Development; Gateway Economic Development Corporation; Greater Omaha Chamber of Commerce

Table 15 below compares employment distribution by industry for the Omaha-Council Bluffs MSA with the U.S. in total at the end of 2012. The Omaha-Council Bluffs region has a higher concentration of its employment in financial activities, 8.9 percent compared to 5.8 percent in the U.S. This is offset by a relatively smaller share of total employment in manufacturing (6.7% vs. 8.9%) and government (14.0% vs. 16.4%) sectors. Otherwise, the region's employment distribution by industry is generally in line with the U.S.

TABLE 15 – Employment Distribution by Industry

Industry	Omaha-Council Bluffs MSA		U.S.	
	# of Jobs*	Rate	# of Jobs*	Rate
Construction	21,110	4.5%	6,492	4.9%
Manufacturing	31,336	6.7%	11,919	8.9%
Trade, Transportation & Utilities	93,771	20.1%	25,516	19.1%
Information	11,381	2.4%	2,678	2.0%
Financial Activities	41,551	8.9%	7,786	5.8%
Professional & Business Services	66,675	14.3%	17,930	13.4%
Education & Healthcare Services	73,085	15.6%	20,319	15.2%
Leisure & Hospitality	45,635	9.8%	13,746	10.3%
Other Services	17,390	3.7%	5,437	4.1%
Government	65,532	14.0%	21,917	16.4%
Total Nonfarm Employment	467,466	100.0%	133,740	100.0%

*Number of jobs in thousands

Source: U.S. Bureau of Labor Statistics; Nebraska Department of Labor, Current Employment Statistics

TRANSPORTATION

The MAPA region is served by an adequate, multi-modal transportation system to provide internal travel to and from the daily destinations of its citizens, as well as regional and national connectivity for the transfer of goods, services and people. A map for major modes of transportation throughout the region can be found on Page 38.

Highway Transportation

The MAPA region has two major interstate highways, two interstate beltways, six U.S. Highways, 23 Nebraska and Iowa-designated routes, and a system of arterial and collector streets. This network of streets serves as the surface transportation system of the MAPA Transportation Study Area.

Interstate System

East-to-west interstate access is provided by Interstate 80, which connects the Omaha-Council Bluffs area to both the Atlantic and Pacific coasts. North-to-south interstate access is provided by Interstate 29, which runs from the Canadian border to Interstate 35 in Kansas City, Missouri. Omaha is also served by Interstate 480, which operates as an interior loop through the downtown areas of Omaha and Council Bluffs. Interstate 680 acts as an intermediate loop for the Omaha area and provides a northern cut-off for north and southbound traffic from I-80 to I-29.

Principal Highways / Major Street System

The MAPA region is served by US-6, US-30, US-34, US-59, US-75, and US-275. These highways supplement the interstate corridors as access routes to employment and commercial areas. There are nine Nebraska and six Iowa state highways that serve the MAPA region.

TABLE 16 – Mainline Length by Federal Functional Classification

Jurisdiction	PRINCIPAL ARTERIALS		Minor Arterials	Collectors	Local	Total Miles
	Interstate	Other				
Douglas Co.	29.3	172.6	192.8	258.3	1,586.3	2,239.2
Sarpy Co.	16.2	51.6	48.2	153.6	565.2	834.8
Washington Co.	0.0	34.0	43.1	147.3	521.1	745.3
Pottawattamie Co.	77.6	25.8	72.0	586.2	949.3	1,710.9
Mills Co.	18.1	44.4	21.8	245.7	478.9	809.1
TOTAL	141.3	328.4	377.9	1,391.1	4,100.7	6,339.3

Note: Numbers represent length in miles (to the nearest tenth)
Source: MAPA Transportation Department

Major Bridges

The MAPA region is a bi-state region separated by the Missouri River. Seven Missouri River bridges provide connectivity between Nebraska and Iowa in the MAPA region:

- I-480 Bridge is an eight-lane structure
- I-80 Bridge is an eight-lane structure
- I-680 Bridge is a four-lane structure
- US-275 Bridge (Veterans Memorial) is a two-lane structure
- NE-370 Bridge (Bellevue) is a two-lane toll bridge
- US-30 is a two-lane structure
- US-34 Bridge is a two-lane toll bridge that connects Mills County, Iowa with Cass County, Nebraska. This bridge will be replaced by a new four-lane structure that will open in 2014.

The Platte River flows south along the western edge of Douglas county and south and east through Sarpy County. Crossings on the Platte River include:

- I-80 is a six-lane structure
- US-6 is a two-lane structure
- US-75 is a four-lane structure
- NE-50 is a two-lane structure
- NE-64 is a two-lane structure
- NE-92 is a two-lane structure

Public Transit

The bulk of public transit service in the MAPA region is provided by three principal organizations: Transit Authority of the City of Omaha, a.k.a. Metro Transit (formerly Metro Area Transit), Southwest Iowa Transit Agency (SWITA), and the Eastern Nebraska Office on Aging (ENOA). Public transit is also provided by various public, semi-public and private operators in the MAPA region. A list of these agencies and organizations can be found in the MAPA Job Access Reverse Commute (JARC) Plan.

Metro Transit provides commuter and fixed route bus services in Omaha city limits and contracted services for the cities of Council Bluffs, Iowa and Bellevue, La Vista, Papillion, and Ralston, Nebraska. The fixed route service is supported by ADA complementary para-transit van service operating in an area of three-quarter miles of existing bus routes.

The current fixed-route system provided by Metro Transit services a majority of the employers in the Omaha area. Of the 10,000 plus employers identified in the 1997 MAPA employment file, 7,893 (77.5 percent) are within one-quarter mile of a Metro Transit fixed-route line. These employers provide jobs for 78.5 percent of all employees in the Omaha area.

Rural transit in Mills and Pottawattamie counties is provided by SWITA. Much of the service is concentrated on helping rural residents access social services. Service is door-to-door and is offered weekdays, 7:00 a.m. to 6:00 p.m., but service outside of normal hours can be arranged.

The ENOA transportation system provides a demand-response system operating Monday through Friday, 8:00 a.m. to 4:00 p.m. This service is limited to rural areas of Cass, Dodge, Douglas, Sarpy, and Washington counties. No service is provided within or between points in Bellevue, La Vista, Omaha, Papillion, or the urban designated portion of northeast Sarpy County.

There are currently several challenges associated with the state of transit in the MAPA region. First, on a regional basis, there is a distinct mix among urban, suburban, and rural constituencies with divergent transit needs. A single solution most likely will not appease all interested users. Second, existing systems have proven historically to be very rigid, despite efforts of transit officials to implement more flexible options to increase ridership. As a result, there are numerous for-profit and non-profit enterprises offering alternative public transportation in the region. In recent years, efforts have been made to coordinate all public and private transit entities to maximize usefulness to customers, but the measurable outcomes of those efforts are yet to be realized.

Other issues with the existing transit system have yet to be addressed. While it is stated above that over three-quarters of employers and employees are within one-quarter mile of a transit route, shifts in development activity and major job centers in the region have not been

accounted for, and many local developers point to a disconnect among transit routes, laborshed concentrations, and emerging job centers as a key economic development challenge in the MAPA region. Concurrently, Metro Transit's funding authority is somewhat geographically constrained. The agency must strike a delicate balance between providing an essential public service and working to accommodate regional economic development.

Water, Air, Rail and Other Transportation Services

There are diverse active transportation corridors in the MAPA region. These systems, individually and collectively, provide interstate connections for the movement of people and goods into and through the MAPA region. These transportation systems complement the existing highway and transit systems in the MAPA region and provide various options for multi-modal transfer of goods, services and people.

Water

The Missouri River is used to move goods from the farm fields and processing plants of the Upper Missouri River Valley to the Mississippi River and ports beyond. Private entities in Council Bluffs, Iowa and Blair, Nebraska operate barge terminal facilities on the Missouri River. The City of Omaha maintains and operates a city dock facility north of the downtown area. Recreational boating interests are served by a series of public and private marinas in Bellevue, Blair, Council Bluffs, and Omaha.

Air

Eppley Airfield, operated by the Omaha Airport Authority, is the region's primary commercial and general aviation airport. Commercial flights are offered through six national airline groups. In 2012 Eppley Airfield serviced 4.1 million passengers and transported 90 million pounds of cargo. Air transportation facilities are also located in Blair, Council Bluffs, Millard, and North Omaha (see Table 17 below).

TABLE 17 – Airport Facilities

Airport Facility Name	Facility Type	Runway Length/ Surface Type	Hours of Operation
Omaha Eppley	Commercial	9,502 ft concrete/asphalt	ALL
	General Aviation	8,153 ft concrete/asphalt	
		8,500 ft concrete	
Omaha Millard	Reliever	3,801 ft concrete	6:00 a.m. – 10:00 p.m.
Council Bluffs Municipal	General Aviation	5,500 ft concrete	Dawn – Dusk
Blair Municipal	General Aviation	4,100 ft concrete	7:00 a.m. – 7:00 p.m.
		4,200 ft concrete	
North Omaha (private)	General Aviation	2,480 ft concrete	Dawn – Dusk

Source: Individual airports facilities

Rail

The Union Pacific and Burlington Northern-Santa Fe railroads operate and maintain approximately 200 miles of rail in the MAPA region. The Burlington Northern-Santa Fe line is part of the United States Department of Defense Strategic Rail Corridor Network and carries the Amtrak passenger rail service. Amtrak's California Zephyr, which connects Chicago to the San Francisco Bay area, passes through the MAPA region and stops in Omaha. Iowa Interstate Railroad and Chicago Central and Pacific Railroad Company provide regional and line-haul services for various products (agricultural products, chemical aggregates, metals, forest products, machinery, etc.) to several locations in the Midwest.

Other Transportation

Regional Bus Service – Burlington Trailways operates and maintains a bus terminal located in downtown Omaha. The bus line takes passengers to 42 Midwestern cities, including Chicago, Denver and Indianapolis. Affordable bus service to and from Chicago (with stops in Des Moines and Iowa City) is also available through Megabus. Arrivals and departures occur twice daily.

Trails – There are approximately 70 miles of mainline, connector and spur trails linking major points of recreation in the MAPA region. The Wabash Trace and the American Discovery Trail, both in the MAPA region, offer regional connections to surrounding states. The trail system in the Nebraska portion of the MAPA region mainly follows the Papio Creek system and runs northwest to southeast.

The Bob Kerrey Pedestrian Bridge is a 3,000-foot long footbridge across the Missouri River between Omaha’s riverfront and River’s Edge Park in Council Bluffs. The bridge, which opened in 2008, is the only pedestrian and bicycle crossing that connects Nebraska and Iowa.

Commuting

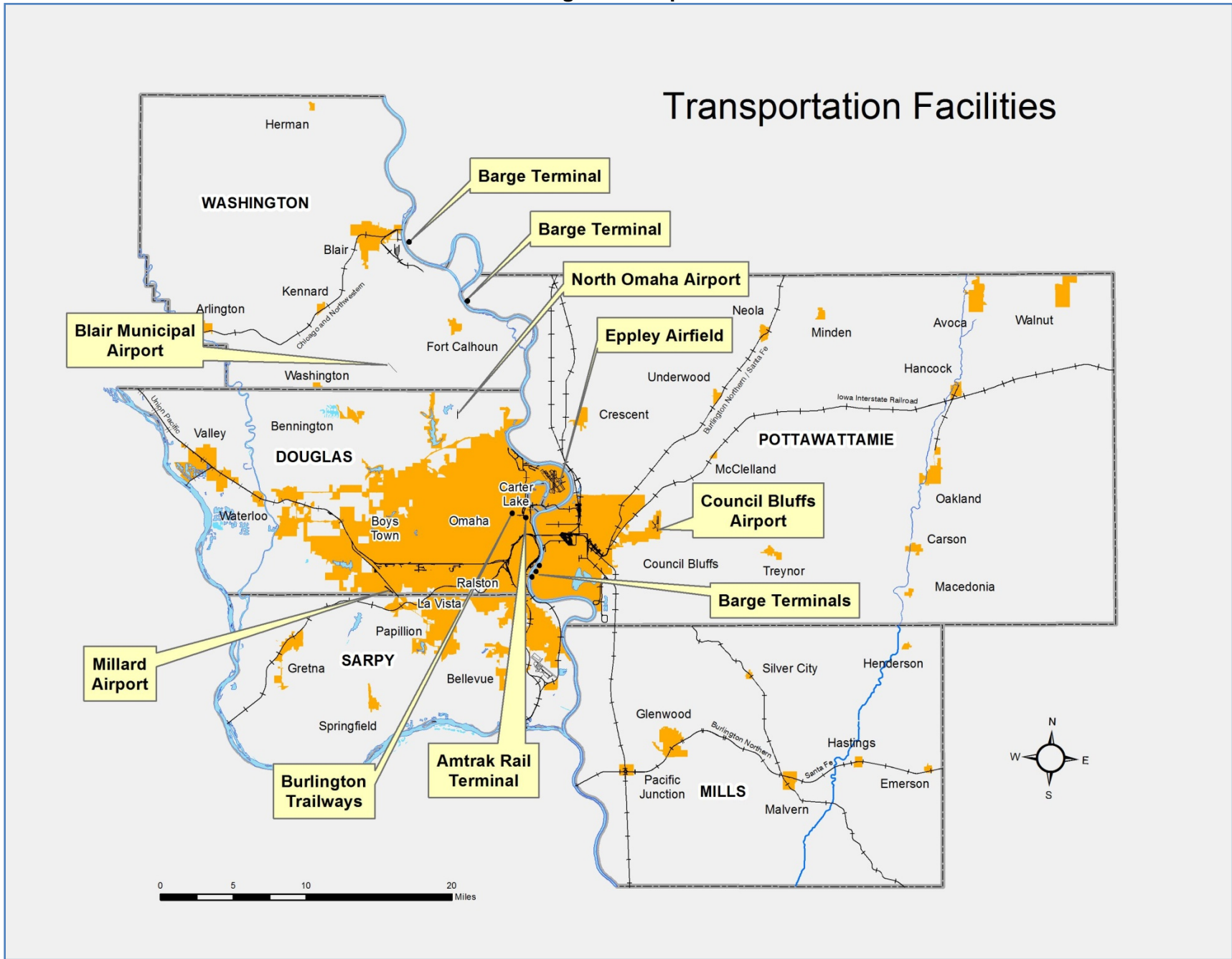
People in the MAPA region generally use personal automobiles to commute to and from work. According to the 2011 American Community Survey, 82.7 percent of workers 16 years of age and over drive alone to work and 9.8 percent carpool. Less than one percent of commuters utilize public transportation, though there are no public transportation alternatives for residents in the region’s rural counties. The proportion of workers utilizing public transportation in Omaha alone is only 1.4 percent, below the national average of 5 percent. In short, commuters in the MAPA region are largely reliant on personal modes of transportation. Table 18 below breaks out commuter means of travel by jurisdiction.

TABLE 18 – Commuter Means of Travel

Commuter Means of Travel	Douglas	Sarpy	Washington	Mills	Pottawattamie	MAPA Region	Omaha
Drives alone	81.7%	86.2%	82.5%	77.1%	82.6%	82.7%	80.3%
Carpools	10.3%	8.3%	7.7%	12.3%	10.1%	9.8%	11.1%
Public transportation	1.2%	0.3%	0.1%	0.0%	0.6%	0.9%	1.4%
Walks	2.3%	1.0%	2.2%	3.3%	1.8%	2.0%	2.8%
Other means	1.0%	0.8%	0.8%	0.8%	0.7%	0.9%	1.0%
Works from home	3.5%	3.4%	6.6%	6.4%	4.1%	3.7%	3.3%
Mean travel time (minutes)	18.5	20.1	22.7	24.9	20.3	21.3	17.8

Source: 2007-2011 American Community Survey 5-Year Estimates

MAP 3 – MAPA Region Transportation Facilities



UTILITIES

Energy

Located across two states, the MAPA region is served by a variety of utility providers. In the region's Nebraska counties, electricity, gas and water/wastewater services are largely provided by two public utility entities, Omaha Public Power District (OPPD) and Metropolitan Utilities District (MUD). Both entities are publicly owned and governed by publically-elected boards that set rates and policies. OPPD and MUD are two of the largest public utility providers in the U.S. In the region's Iowa counties, utilities are provided by private companies that include Black Hills Energy and MidAmerican Energy. Rural portions of Pottawattamie County are served by two regional electric cooperatives. Table 19 lists electric and natural gas providers by county in the region.

TABLE 19 – Electric & Natural Gas Utility Providers

Jurisdiction	Electric	Natural Gas
Douglas Co.	OPPD	MUD
Sarpy Co.	OPPD	MUD
Washington Co.	OPPD	Black Hills Energy; MUD
Mills Co.	MidAmerican Energy	MidAmerican Energy; Black Hills Energy
Pottawattamie Co.	MidAmerican Energy; Nishna Valley Regional Electric Cooperative (REC); Harrison County REC	MidAmerican Energy; Black Hills Energy

Source: Individual utility providers

Electric rates in the MAPA region are typically lower than the national average. Table 20 lists average retail prices (in cents per kWh) for industrial, commercial and residential uses in the region compared to the U.S. averages.

TABLE 20 – Average Retail Prices for Electrical Uses

Average Retail Price (cents/kWh)			
	Industrial	Commercial	Residential
MidAmerican Energy (IA)	4.29	6.76	8.83
OPPD (NE)	5.38	8.40	10.12
National average	8.36	10.56	11.42

Source: Energy Information Administration, Form-861 (2012)

Water Supply and Distribution

The two major water service providers in the MAPA region are MUD and Council Bluffs Water Works. MUD serves the cities of Omaha, Bellevue, Bennington, La Vista, and Ralston, Nebraska and Carter Lake, Iowa. Council Bluffs Water Works serves the cities of Council Bluffs and Crescent; Council Bluffs Water Works also provides water to Regional Rural Water for distribution to Underwood and McClelland. The remaining cities in the MAPA region draw their water supply from well or river sources and are operated and maintained at the municipal level. Table 21 provides waterworks characteristics for cities in the region over 1,000 in population.

TABLE 21– Municipal Waterworks Characteristics (cities +1,000 in population)

Municipality	Treatment Capacity (GPD [^])	Average Demand (GPD)	Peak Demand (GPD)	Storage Capacity (gal)	Water Source
Arlington, NE	1,000,000	170,000	400,000	300,000	Wells
Avoca, IA	600,000	215,300	348,200	280,000	Wells
Blair, NE*	14,000,000	7,500,000	8,000,000	1,800,000	River
Council Bluffs, IA*	20,000,000	11,303,000	18,470,000	13,600,000	River/Wells
Glenwood, IA*	2,400,000	900,000	1,600,000	2,150,000	Wells
Gretna, NE	N/A	844,000	1,285,000	500,000	Wells
Malvern, IA	N/A	120,000	170,000	250,000	Wells
Oakland, IA*	840,000	500,000	700,000	600,000	Wells
Omaha, NE*	234,000,000	97,000,000	223,000,000	116,000,000	River/Wells
Papillion, NE	15,000,000	2,642,000	7,700,000	6,000,000	Wells
Springfield, NE	N/A	163,300	281,000	500,000	Wells
Valley, NE	2,800,000	275,100	772,000	750,000	Wells

[^]Gallons per day

*Serves other communities not listed

Source: Individual municipalities; Western Iowa Development Association

Wastewater Treatment

Nearly all communities in the MAPA region have public wastewater treatment facilities. The types of treatment systems vary. Generally, the treatment systems in smaller communities are more likely to be near or over design capacity compared to the systems of larger cities. Facilities that are near or over design capacity are limited in their ability to handle additional growth caused by economic development. Capacity and treatment characteristics for select cities over 1,000 in population are outlined in the following table.

TABLE 22 – Municipal Wastewater Treatment Characteristics (cities +1,000 in population)

Municipality	Design Capacity (GPD [^])	Average Load (GPD)	Peak Load (GPD)	Treatment Type
Arlington, NE	165,000	130,000	180,000	Secondary
Avoca, IA	255,000	193,000	251,000	Primary
Bellevue, NE	4,000,000	1,200,000	1,480,000	Activated Sludge
Blair, NE	2,000,000	1,000,000	1,200,000	Activated Sludge
Council Bluffs, IA	16,300,000	7,000,000	9,000,000	Trickling Filter/Activated Sludge
Glenwood, IA*	1,800,000	750,000	1,200,000	Rotating Biological Contactor
Malvern, IA	248,000	195,000	492,000	Lagoons
Oakland, IA	330,000	150,000	382,000	Lagoons
Omaha, NE*	116,000,000	90,000,000	Unknown	Secondary
Springfield, NE	220,000	161,000	208,500	Activate Sludge
Valley, NE	550,000	428,000	900,000	Rotating Biological Contactor

[^]Gallons per day

*Serves other communities not listed

Source: Individual municipalities; Western Iowa Development Association

The City of Omaha’s wastewater treatment system is the largest in the MAPA region. This system also serves Bennington, Carter Lake, Gretna, La Vista, Papillion, Ralston, and a portion of Bellevue. Omaha has been mandated by the Environmental Protection Agency (EPA) to

implement controls and infrastructure improvements that will reduce the annual number of combined sewer overflows (storm water mixed with raw sewage that flows into the Missouri River). This is an unfunded mandate by EPA and currently the program is funded through 30-year revenue bonds and incremental sewer rate increases for residential and commercial customers. Implementation began in 2010 and work should continue until 2024. It is estimated that the total project will cost \$2 billion (2012 dollars).

Telecommunications

Cable, telephone and Internet in the MAPA region are provided by a variety of private companies and cooperatives. The two largest providers in the region are CenturyLink and Cox Communications and both companies provide service (with some overlap) in the urban areas of Douglas, Pottawattamie and Sarpy counties. Service outside the urbanized area is distributed by approximately a dozen providers.

Convenient access to high-speed broadband capabilities and gaps in service are issues for rural areas of the MAPA region due to low consumer density. And though broadband is readily available in denser urban areas, the concentration of data centers and broadband dependent industries in the region puts pressure on existing networks.

AGRICULTURE

Agriculture is prevalent in all MAPA counties as the region is located in Nebraska and Iowa, two of the nation's leading agriculture-producing states. Farmland constitutes approximately 78 percent of the region's total land use (see land use inventory on Page 62). Table 23 provides agriculture statistics for the MAPA counties and region as a whole. In 2007, the most recent Agriculture Census, there was a total of 1,085,298 acres of farmland in the MAPA region with an average farm size of 344 acres. The average sale per farm was \$179,865, below the averages of Nebraska and Iowa. Much of the region's farmland and total agriculture production is concentrated in Pottawattamie County.

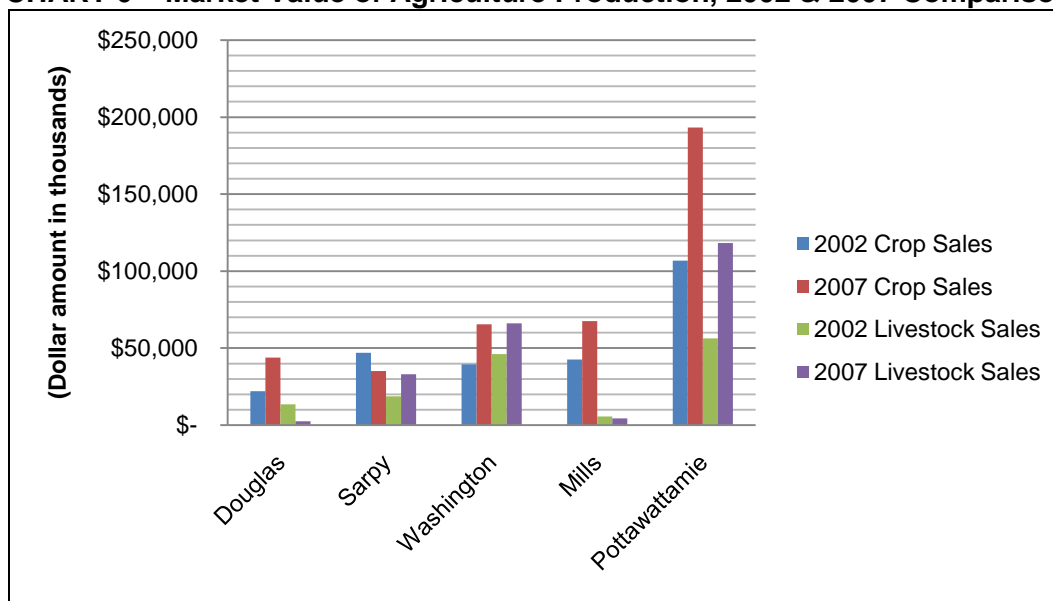
TABLE 23 – 2007 Agriculture Census Statistics

Jurisdiction	Number of Farms	Acres of Farmland	Average Farm Size	Total Sales	Average Sales/Farm
Douglas Co.	362	84,374	233	\$46,340,000	\$128,012
Sarpy Co.	360	100,835	280	\$68,104,000	\$189,178
Washington Co.	762	217,306	285	\$131,435,000	\$172,487
Mills Co.	511	196,840	385	\$71,878,000	\$140,662
Pottawattamie Co.	1,158	485,943	420	\$311,485,000	\$268,985
MAPA Region	3,153	1,085,298	344	\$629,242,000	\$179,865

Source: U.S. Department of Agriculture, Census of Agriculture (2007)

The number of farm sales for crops and livestock in the MAPA region rose 57 and 59 percent between 2002 and 2007. Pottawattamie County leads the region in agriculture production by a wide margin and had the largest rate of growth between 2002 and 2007 at 91 percent; Sarpy County had the region's smallest rate of growth in that period, less than 4 percent. Not surprisingly, agriculture production in the region is least concentrated in the counties that mostly comprise the urban core, Douglas and Sarpy counties. Chart 6 below shows the growth of total crop and livestock sales per county between 2002 and 2007.

CHART 6 – Market Value of Agriculture Production, 2002 & 2007 Comparison



Source: U.S. Department of Agriculture, Census of Agriculture (2002 & 2007)

Agriculture and related enterprises are major sources of employment in the region, especially in rural areas. However, fewer people are needed on farms as agriculture technology improves. Many of the region's agriculture jobs are now found in major manufacturing operations such as Cargill, ConAgra Foods and Bungee North America. Table 24 lists the largest agriculture-related employers in the MAPA region, according to the Greater Omaha Chamber of Commerce's top 100 listing of major employers for the Omaha-Council Bluffs MSA.

TABLE 24 – Major Agriculture-Related Employers

Area Rank*	Employer	Number Employed	Product/Service	Industry
13	ConAgra Foods	2,500-4,999	Food Products	Manufacturing
22	Omaha Steaks	1,000-2,499	Food Products	Retail Trade
63	Nebraska Beef	500-999	Meat Processing	Manufacturing
77	Greater Omaha Packing Co.	500-999	Meat Processing	Manufacturing
79	Tyson Foods, Inc.	500-999	Meat Processing	Manufacturing
87	Kellogg Co.	500-999	Food Products	Manufacturing
96	Oakland Foods LLC	500-999	Meat Processing	Manufacturing

*Rankings as of April 8, 2013

Source: Greater Omaha Chamber of Commerce

NATURAL ENVIRONMENT & RESOURCES

Climate

The MAPA region is centered almost geographically in the interior plains of North America and is located within a transitional area between a generally humid climate to the east and an arid climate to the west. The area is not directly influenced by the presence of mountains, oceans or large inland bodies of water that serve as climatic buffers. This combination of transitional location and lack of climatic buffers result in the region's large range of climatic extremes and rapid changes in weather conditions. The relatively unimpeded invasion of large air masses of differing character is commonplace and often causes extreme weather events.

The MAPA region has a continental climate with relatively warm, humid summers and cold, dry winters. Most precipitation occurs during April through September in the form of showers or thunderstorms in the evening hours. Average annual rainfall is 30.4 inches and average annual snowfall is 27.6 inches. Average monthly climate data for the region are provided in Table 25.

TABLE 25 – Average Monthly Climate Data (Omaha Eppley Airfield)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Average high temperature (F)	31.6	37.3	49.2	63.5	74.0	83.5	87.7	85.5	77.2	65.9	49.4	36.0
Average low temperature (F)	12.1	17.6	27.8	40.1	51.4	61.4	66.6	64.2	54.0	42.1	29.0	17.3
Average participation (in.)	0.78	0.92	1.89	2.92	4.55	4.10	3.77	3.91	3.05	2.13	1.49	0.90
Average total snowfall (in.)	6.8	6.2	5.3	0.8	0.0	0.0	0.0	0.0	0.0	0.3	2.4	5.7

Note: Period of record is 06/01/1948 to 03/31/2013
Source: High Plains Regional Climate Center

Soil

The MAPA region is in the Great Plains region of the United States. The soils of the region have developed on the rolling hills of eastern Nebraska and western Iowa and formed in three kinds of parent material: Peoria Loess and younger loess, glacial till, and alluvium. The soils on the bottom land in the valleys of the Elkhorn, Missouri and Platte rivers formed in alluvium. This alluvium ranges from clay to sand and is commonly stratified. The composition of soils in the MAPA region, and the Midwest in general, is highly conducive to agriculture.

Soil in the urbanized portion of the MAPA region has endured contamination resulting from heavy industry. From the 1870s until the late 1990s, Asarco, a lead-refining plant, operated on 23 acres along the Missouri River near downtown Omaha. Lead and other heavy metals were emitted into the air and deposited on the ground surface during the plant's operation.

In 1998 the Omaha City Council solicited assistance from EPA to address problems with lead contamination. Soil testing of approximately 22,000 residential properties revealed widespread lead contamination over eastern Omaha. Lead is classified by EPA as a probable human carcinogen and is a cumulative toxicant. The contamination area was added to the National Priorities List by EPA in 2003. The impacted area covers approximately 17,921 acres (27.0 square miles). Cleanup is still underway and there is currently no fixed end date for cleanup activities.

In 2011 the Omaha Brownfields Coalition, consisting of MAPA, Metropolitan Community College and the Papio-Missouri River Natural Resources District, was formed under a grant from EPA to

address brownfields in a portion of the South Omaha Redevelopment Area (SORA). In addition to the 237 state-documented spill sites, there are at least 500 known or suspected contaminant releases in the SORA. Almost half of the area's residents are Hispanic or Latino, and 16.6 percent of residents live below the poverty level. Grant funds are being used to perform 30 Phase I and 10 Phase II environmental site assessments for properties that are likely to have hazardous substance and/or petroleum contamination. Grant funds are also reserved for cleanup planning, public health screenings and community outreach activities. The Omaha Brownfields Coalition will remain in effect until fall of 2014.

Water Sources

Water sources exist in the MAPA region in the forms of major rivers, lakes and numerous streams. The Missouri River is the region's largest and most heavily used water resource, both commercially and recreationally. The Elkhorn, Nishnabotna and Platte rivers also traverse the region. Carter Lake and Lake Manawa are the region's two largest lakes, both formed by separate Missouri River floods that occurred in the late 1800s. A map of the region's water sources can be found on the proceeding page.

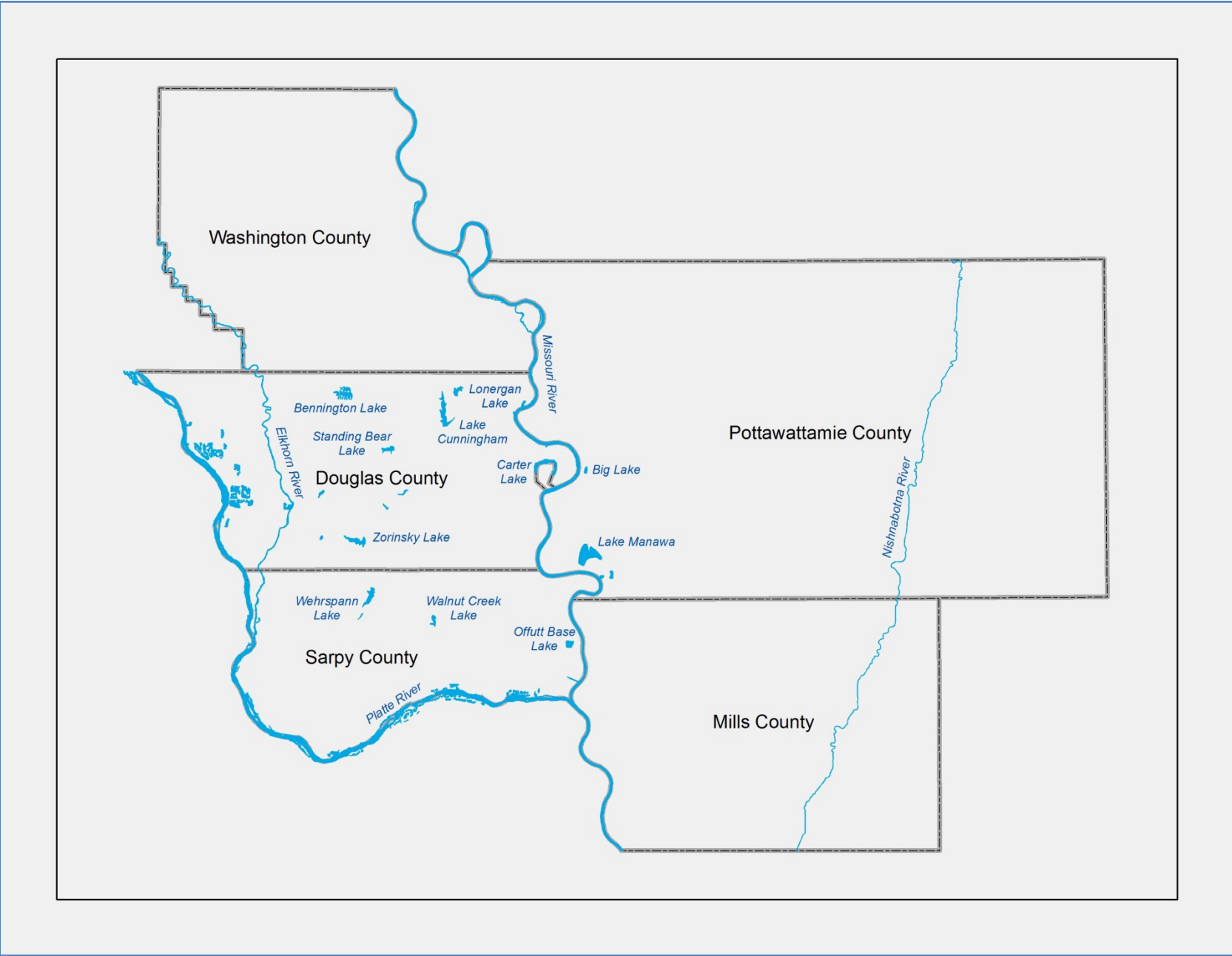
Floodplains and Flooding

The Papio-Missouri River Natural Resources District in Nebraska and Golden Hills Resource Conservation and Development in Iowa work to conserve, manage and enhance the natural resources in the region, including land that is located in flood hazard areas.

Flood hazard mitigation is accomplished in different ways, including channelization and dam rehabilitation projects, and by the purchase of properties located in the floodplain. "Buyout" programs, as are commonly referred, acquire properties in flood hazard areas and remove or demolish any structural properties. Once properties are acquired and structures are removed, land is restored to green space with restrictions on development put in place. Buyout programs were implemented with FEMA assistance as a result of two separate Missouri River floods in 1993 and 2011. Programs as a result of the 2011 flood are currently in progress in Pottawattamie and Sarpy counties.

Both floods were historic but the 2011 flood was unprecedented for several reasons. Heavy rains and delayed snow melt in the upper river basin forced the U.S. Army Corps of Engineers to release record amounts of water from its network of dams. From June through September, portions of all five MAPA counties were inundated with water. Though levees did not fail, they were significantly strained by the record length of inundation. Several bridges and portions of Interstates 29 and 680 were closed off during the flood's duration. Other critical facilities in the region were hindered. The grounds of the Fort Calhoun Nuclear Generating Station were inundated, though the plant was in shutdown mode for nonrelated reasons. Eppley Airfield in Omaha had to expend massive resources to keep floodwaters at bay.

MAP 4 – MAPA Region Water Sources



SECTION III
ANALYSIS OF ECONOMIC CONDITIONS

OVERVIEW

The following discussion of key economic indicators is presented to summarize recent trends in the regional economy. This information, taken together with the demographic and background statistics presented in Section II, provides further analysis of the local environment and allows for meaningful discussion and assessment of regional economic development opportunities and challenges.

EDA REQUIRED PERFORMANCE INDICATORS

The performance measures below are provided as part of the CEDS reporting requirements from EDA. The results are based on information routinely tracked as part of the CEDS process. The following sections of this document provide additional detail related to each performance measure. These sections should be reviewed annually to fully comprehend the socioeconomic condition and economic development initiatives of the MAPA region.

- I. Number of jobs created and/or retained in the region:** For the 2013 fiscal year, records from the key economic development entities in the region show their efforts helped create/and or retain an estimated 4,266 jobs since the last CEDS Progress Report. Business restructuring and closings resulted in the loss of 739 jobs during that same period.
- II. Number and types of investment in the region:** Local government records indicate 355 locally significant economic development related projects were completed in the region since the last CEDS Progress Report. Projects included public works improvements, downtown redevelopment, quality of life enhancements, and significant retail/commercial developments.
- III. Amount of private sector investment in the region:** Local government records show that there has been approximately \$1.34 billion in private investments to economic development projects in the region since the last CEDS Progress Report.
- IV. Economic changes in the region:** The region's economy continues expanding steadily with measured growth in total employment, labor force, and retail sales. Key challenges will be stimulating redevelopment, providing access to emerging job centers for unemployed and underemployed workers, and improving public transportation.

ECONOMIC INDICATORS

Personal Income

According to the 2011 American Community Survey, the MAPA region has an average per capita income³ of \$27,818, 99.7 percent the national average. No county in the MAPA region has an average per capita income below 80 percent the U.S. average, which is the eligibility threshold for EDA assistance. However, there are census tracts, largely in Omaha and Bellevue, where the per capita income is at 80 percent or below the national average. Map 5 on Page 50 identifies the location of economically distressed census tracts in the region.

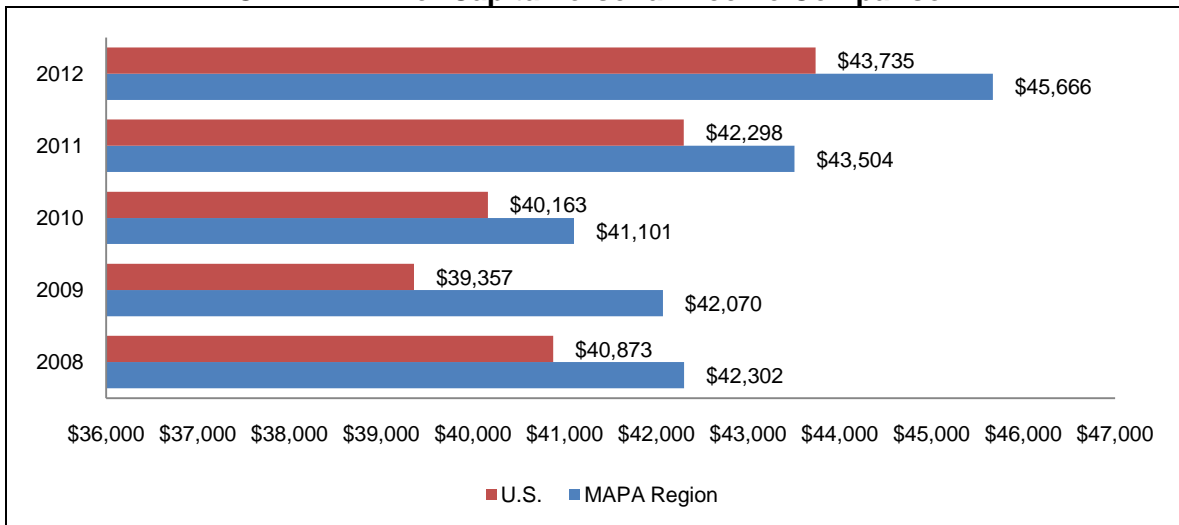
TABLE 26 – Per Capita Income (PCI)

Jurisdiction	2011 PCI	% of U.S. Average
U.S.	\$27,915	100.0%
Nebraska	\$26,113	93.5%
Douglas Co.	\$28,910	103.6%
Sary Co.	\$29,610	106.1%
Washington Co.	\$28,829	103.3%
Iowa	\$26,110	93.5%
Mills Co.	\$27,099	97.1%
Pottawattamie Co.	\$24,644	88.3%
MAPA Region	\$27,818	99.7%

Source: 2007-2011 American Community Survey 5-Year Estimates

Another indicator used to assess local and regional economies is per capita personal income⁴. The MAPA region has had an above average per capita personal income over the last five years, ranging from 102 to 107 percent the U.S. average. Chart 7 below shows the trend between 2008 and 2012.

CHART 7 – Per Capita Personal Income Comparison

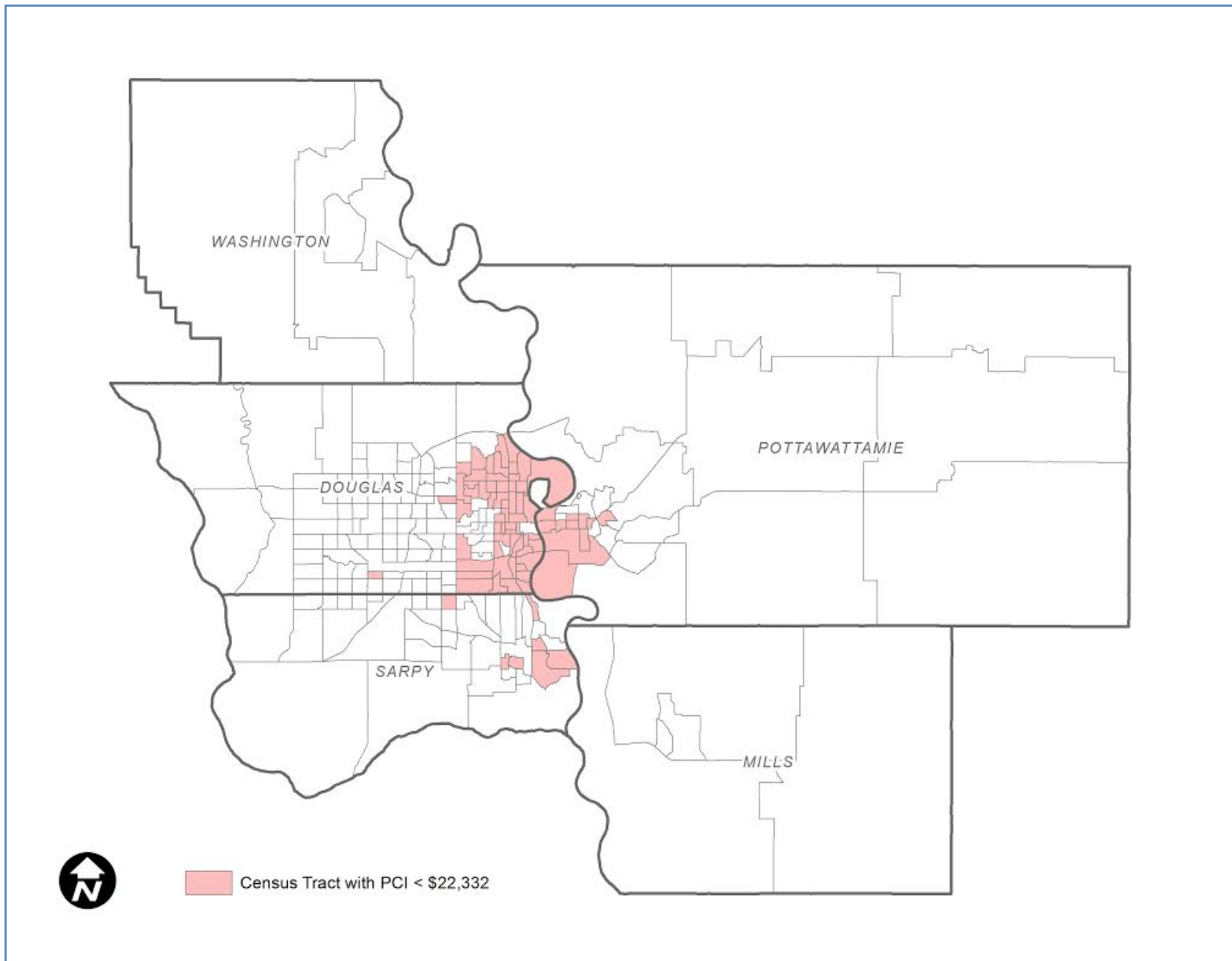


Source: Bureau of Economic Analysis

³ Per capita income is the mean income computed for every man, woman and child in a particular group including those living in groups quarters. The U.S. Census Bureau counts money income before taxes or other deductions. Per capita income is derived by dividing the aggregate income of a group (e.g. a county) by the total population in that group.

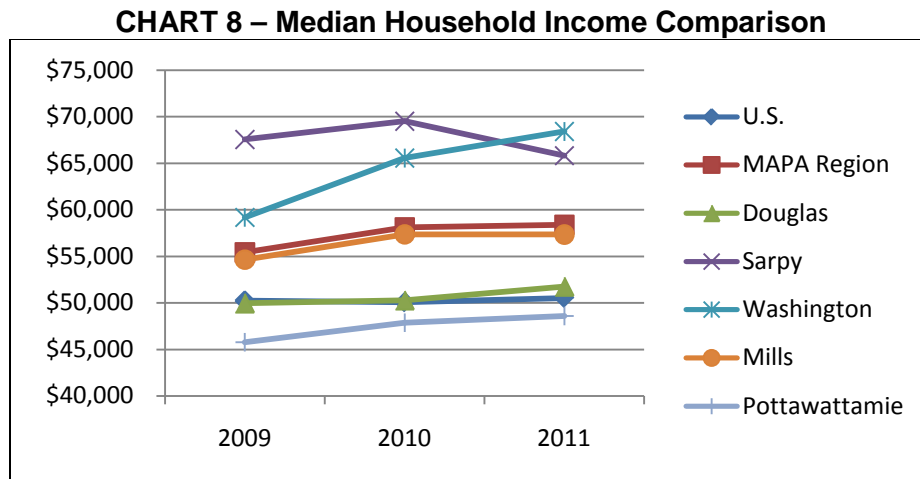
⁴ Per capita personal income includes some items not counted by the U.S. Census Bureau such as "in kind" income received by non-profit institutions, the value of services and other financial intermediaries rendered to people without the assessment of specific charges, and Medicare payments.

MAP 5 – Economically Distressed Census Tracts



Household Income

Household income is a measure of the combined incomes of all people sharing a particular household or place of residence. It includes every form of income (e.g. salaries and wages, retirement income, investment gains, etc.) and it is used as an indicator for the monetary well-being of citizens in a defined area. In recent years the MAPA region has enjoyed a median household income above the U.S. average, according to data collected by the United States Census Bureau's Small Area Income and Poverty Estimates. Chart 8 shows the trends in median household income for the U.S., MAPA region, and individual MAPA counties from 2009 to 2011, the most current year data are available.

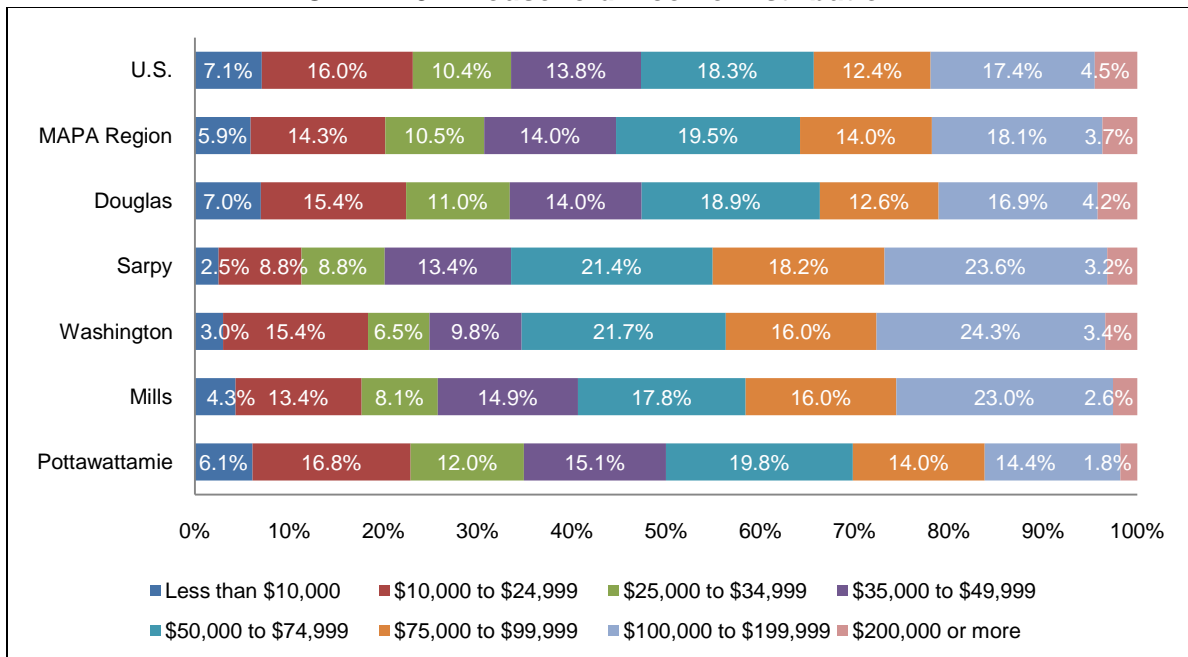


Source: U.S. Census Bureau, Small Area Income and Poverty Estimates

Washington County's median household income rose significantly from 2009 to 2011, increasing from under \$60,000 to over \$68,000, surpassing Sarpy County for the region's top household income. Douglas County's household income from 2009 to 2011 generally corresponded with the U.S. in that same period. Pottawattamie County's household income gradually increased but remained below the national and regional marks.

Household income data are collected and divided according to income thresholds by the United States Census Bureau and American Community Survey. According to the 2011 American Community Survey, the slight majority of U.S. households, 18.3 percent, have an income of \$50,000 to \$74,999. This is true for the region as a whole and Douglas and Pottawattamie counties, but Mills, Sarpy and Washington counties have larger proportions of households earning \$100,000 to \$199,999. Chart 9 shows the distribution of household income for the U.S., MAPA region, and all MAPA counties.

CHART 9 – Household Income Distribution



Source: 2007-2011 American Community Survey 5-Year Estimates

Poverty

According to the United States Census Bureau’s Small Area Income and Poverty Estimates, the MAPA region has had a lower than average rate of poverty compared to the U.S. going back to 2008. However, Douglas and Pottawattamie counties have consistently had poverty rates above the regional average and the average of their respective states. Much of the poverty in Douglas and Pottawattamie counties can be located in the urbanized area, mainly eastern Omaha and western Council Bluffs. Poverty in these areas is attributed to low personal income referenced on Pages 49 and 50.

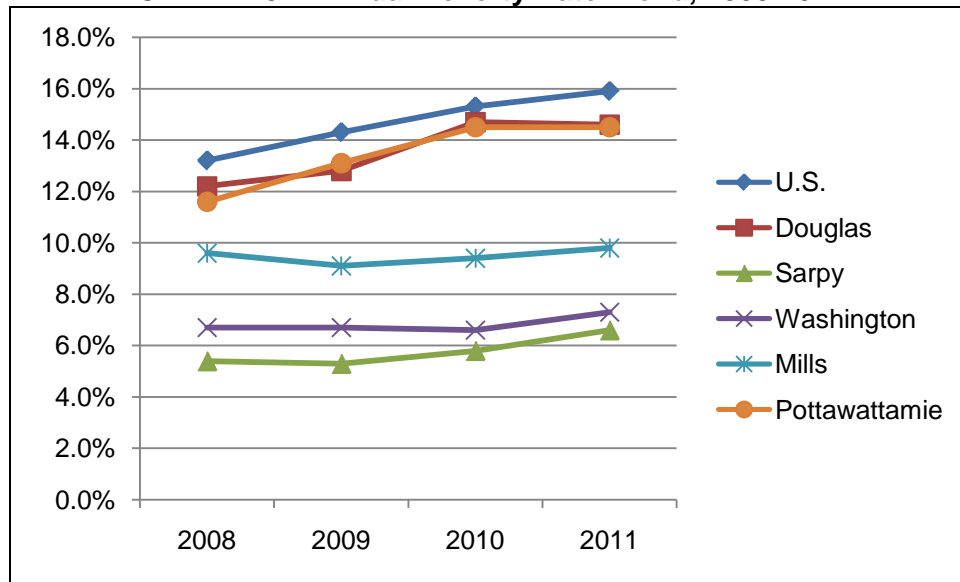
Table 27 lists the number of persons in poverty and the percent of the total population for the U.S., Nebraska and Iowa, MAPA counties, and the region in total from 2008 through 2011. Chart 10 shows the trend of poverty rates for the counties compared to the U.S. during the same period of time. Sarpy and Washington counties have had the lowest rates of poverty in the MAPA region, both below the eight percent mark. Mills County’s rate has remained relatively fixed at over nine percent.

TABLE 27 – Total Number & Percent of Individuals in Poverty, 2008-2011

Jurisdiction	2008		2009		2010		2011	
	# in Poverty	% in Poverty	# in Poverty	% in Poverty	# in Poverty	% in Poverty	# in Poverty	% in Poverty
U.S.	39,108	13.2%	42,868,163	14.3%	46,215,956	15.3%	48,452,035	15.9%
Nebraska	186,480	10.8%	212,312	12.2%	224,530	12.6%	230,003	12.9%
Douglas Co.	59,511	12.2%	63,394	12.8%	74,253	14.7%	74,975	14.6%
Sarpy Co.	7,971	5.4%	7,996	5.3%	9,188	5.8%	10,632	6.6%
Washington Co.	1,296	6.7%	1,278	6.7%	1,300	6.6%	1,433	7.3%
Iowa	331,057	11.4%	342,309	11.8%	368,965	12.5%	376,300	12.7%
Mills Co.	1,406	9.6%	1,320	9.1%	1,364	9.4%	1,420	9.8%
Pottawattamie Co.	10,128	11.6%	11,485	13.1%	13,219	14.5%	13,205	14.5%
MAPA Region	756,705	10.6%	767,386	11.1%	789,399	12.6%	799,806	12.7%

Source: U.S. Census Bureau, Small Area Income and Poverty Estimates

CHART 10 – Annual Poverty Rate Trend, 2008-2011



Source: U.S. Census Bureau, Small Area Income and Poverty Estimates

Cost of Living

The Cost of Living Index (COLI), formerly the American Chamber of Commerce Research Association, or ACCRA, conducts a quarterly cost of living survey for hundreds of metropolitan areas, including the Omaha-Council Bluffs MSA. COLI measures relative price levels for consumer goods and services in participating cities, as compared with the national average of 100. The Greater Omaha Chamber of Commerce regularly monitors COLI.

The Omaha area has historically maintained a low cost of living and there are no indications that the trend will reverse in the foreseeable future. Table 28 below shows the 2012 annual Omaha-Council Bluffs MSA cost of living index for select goods and services. Table 29 compares the Omaha area's cost of living with other U.S. metropolitan areas.

TABLE 28 – Omaha-Council Bluffs MSA Cost of Living Index

Cost of Living Index (National average equals 100)	
All Items	89.6
Grocery	94.4
Housing	80.8
Utilities	89.9
Transportation	96.6
Healthcare	99.0
Miscellaneous Good & Services	89.6

Source: Greater Omaha Chamber of Commerce

TABLE 29 – Metropolitan Area Cost of Living Comparison

Metropolitan Area	General Composite Index
New York, NY	225.3
San Francisco, CA	163.3
Washington, DC	144.7
San Diego, CA	131.8
Los Angeles, CA	130.8
Philadelphia, PA	122.8
Chicago, IL	117.1
Seattle, WA	115.2
Miami, FL	109.0
Minneapolis, MN	108.7
Denver, CO	104.5
Cleveland, OH	101.6
Kansas City, MO-KS	99.5
Dallas, TX	98.9
Las Vegas, NV	98.2
Detroit, MI	97.0
Atlanta, GA	96.9
Phoenix, AZ	96.8
Austin, TX	95.6
Salt Lake City, UT	95.2
St. Louis, MO-IL	91.5
Raleigh, NC	90.8
Oklahoma City, OK	90.8
Des Moines, IA	90.2
Omaha, NE	89.6

Source: Greater Omaha Chamber of Commerce

Housing

Growth in housing throughout the MAPA region has been driven by single-family residential structures. The early concentration of housing and the built environment in the region's urban core has given way to lower-density development and decentralization. In Omaha alone, between 1960 and 1990, the physical footprint expanded 100 percent for an 11 percent gain in population. Table 30 and the proceeding chart below show housing growth trends from 1950 to 2010. Growth occurred at a much higher rate in the 1950s and 1960s as a result of the post-World War II baby boom.

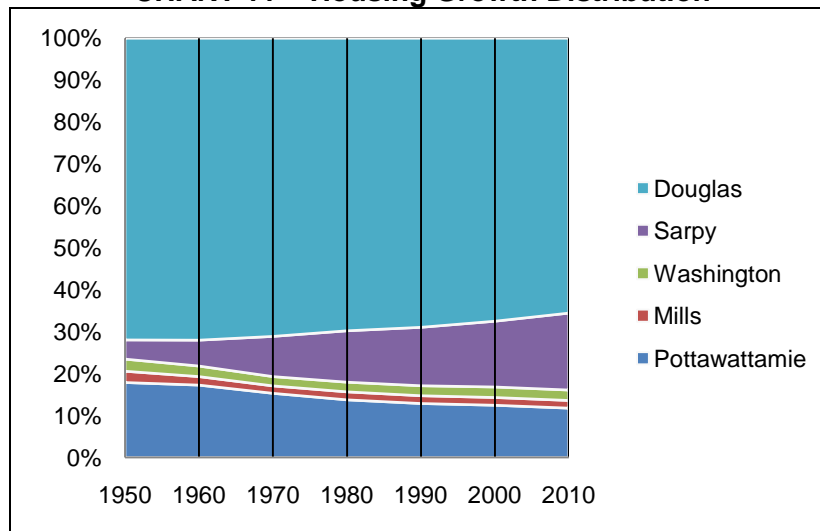
TABLE 30 – Housing Growth

Decade	Beginning Inventory	Ending Inventory	Net Growth	Growth Rate
1950 1959	72,560	107,187	34,627	47.7%
1960 1969	107,187	150,845	43,658	40.7%
1970 1979	150,845	204,951	54,106	35.9%
1980 1989	204,951	238,843	33,892	16.5%
1990 1999	238,843	281,870	43,027	18.0%
2000 2010	281,870	332,537	50,667	18.0%

Source: 2007-2011 American Community Survey 5-Year Estimates

In total, there were 335,186 housing units in the MAPA region according to the 2010 census, 92.7 percent (or 310,654) of which were occupied. The regional vacancy rate in 2010 was 7.3 percent, below the averages of Iowa, Nebraska and the U.S. Vacancy rates for the MAPA counties are as follows: Douglas County (7.8%), Sarpy County (6.2%), Washington County (6.5%), Mills County (8.3%), and Pottawattamie County (6.5%).

CHART 11 – Housing Growth Distribution

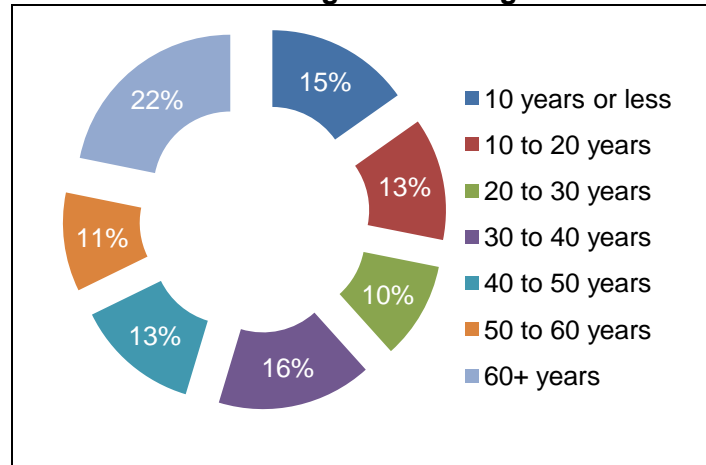


Source: 2007-2011 American Community Survey 5-Year Estimates

Douglas County maintains 65.5 percent of the MAPA region's housing stock. As Chart 11 above illustrates, housing in Sarpy County is growing at a higher rate than other MAPA member counties, and comprises a larger proportion of the region's housing stock over time. From 2000 to 2010, housing in Sarpy County grew by 53.6 percent while the remaining region grew by 5.6 percent. Sarpy County's growth reflects the preference for single-family housing, which is difficult to develop at scale in established urban areas.

Age of housing in the MAPA region is fairly evenly distributed. Approximately 54 percent of housing stock is under 40 years old. Above average housing growth occurred in the 1970s and in the 2000s. Chart 12 shows the housing distribution of the region by age.

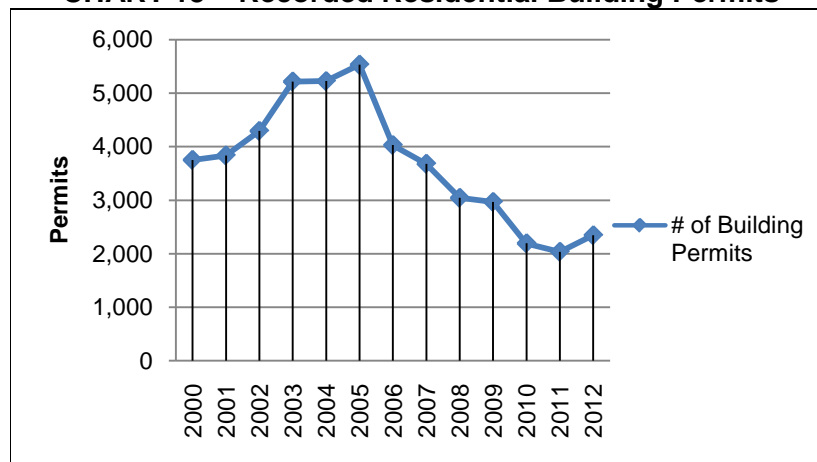
CHART 12 – Age of Housing Stock



Source: 2007-2011 American Community Survey 5-Year Estimates

The United States Census Bureau collects residential building permit data on a monthly and annual basis based on a statistical sample. Chart 13 illustrates the trend in building permits for the MAPA region from 2000 to 2012 based on the Census Bureau’s Building Permits Survey. Building permits gradually climbed in the early 2000s, peaking in 2005. After 2005 the region experienced six consecutive years of declining residential building permits. The decline likely began as a result of the national economic recession that began in late 2008/early 2009. Positive growth occurred in 2012 and it is believed by many in the Omaha area housing and lending fields that the upswing should continue in the near foreseeable future.

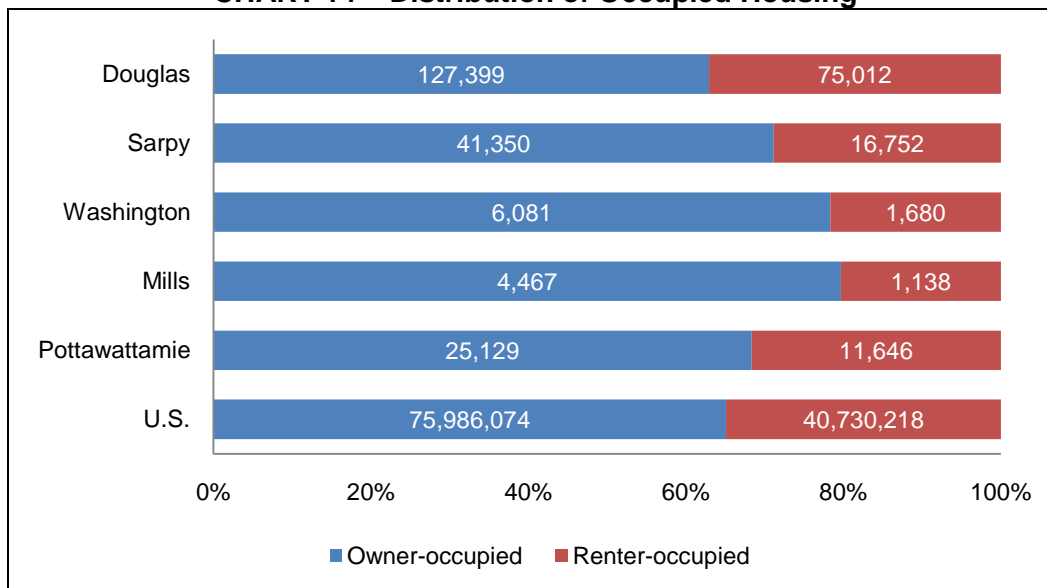
CHART 13 – Recorded Residential Building Permits



Source: U.S. Census Bureau, Building Permits Survey

Of the 310,654 occupied housing units in the MAPA region, 65.8 percent are owner-occupied, which is in line with the national average. Washington County and Mills County, the region's most rural counties, have the highest rates of owner-occupied housing. Douglas County, the most urban county, has the smallest rate of owner-occupied homes in the region at 62.9 percent. Chart 14 shows the number and percentage of owner and renter-occupied housing by county.

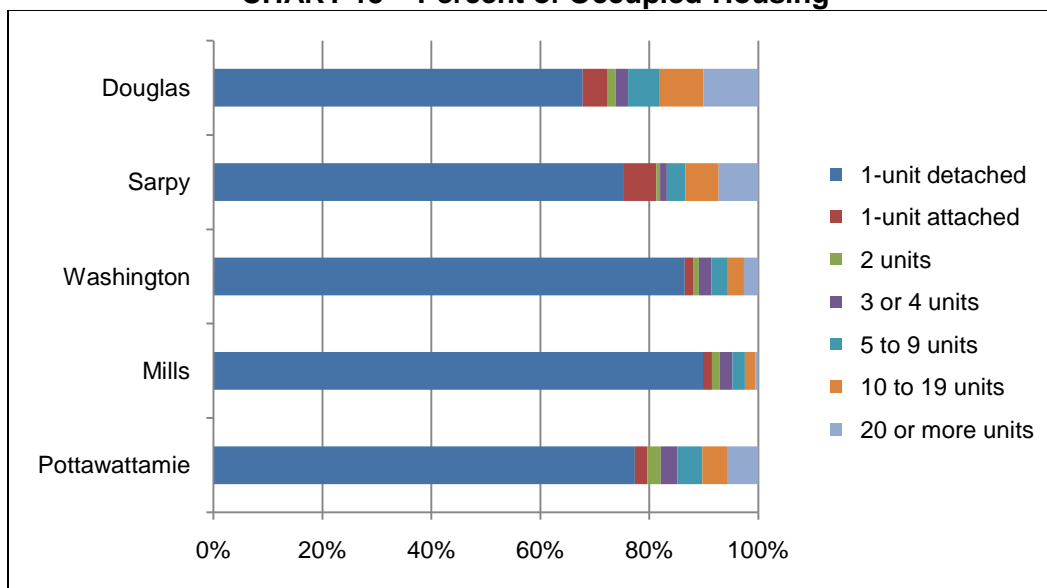
CHART 14 – Distribution of Occupied Housing



Source: U.S. Census Bureau

Chart 15 shows the percent of owner-occupied housing units based on American Community Survey data. Detached single-family homes comprise at least 75 percent of owner-occupied housing in four out of five counties in the MAPA region; Douglas County's rate is 67.8 percent.

CHART 15 – Percent of Occupied-Housing



Source: 2007-2011 American Community Survey 5-Year Estimates

Median home values have risen steadily throughout the MAPA region in the last decade. The median value for owner-occupied homes in the region is \$150,200 according to the American Community Survey, a 48.7 percent increase since 2000. Median home values are listed by county in the region from 1990 to 2010 in Table 31. Moreover, housing costs have historically been lower than other metropolitan regions, both regionally and nationally. Table 32 shows the cost of living for housing for the Omaha-Council Bluffs MSA compared to other select metropolitan areas.

TABLE 31 – Median Home Value

Jurisdiction	1990	2000	2010	1990-2000 % Change	2000-2010 % Change
Douglas Co.	\$59,900	\$100,800	\$142,400	68.3%	41.3%
Sarpy Co.	\$66,900	\$112,100	\$160,800	67.6%	43.4%
Washington Co.	\$58,200	\$114,300	\$172,900	96.4%	51.3%
Mills Co.	\$47,000	\$92,900	\$147,900	97.7%	59.2%
Pottawattamie Co.	\$46,900	\$84,900	\$127,000	81.0%	49.6%
MAPA Region	\$55,780	\$101,000	\$150,200	81.1%	48.7%

Source: U.S. Census Bureau; 2007-2011 American Community Survey 5-Year Estimates

TABLE 32 – Cost of Living Comparison for Housing

Metropolitan Area	Housing
New York, NY	454.1
San Francisco, CA	294.8
Los Angeles, CA	169.9
Chicago, IL	137.2
Minneapolis, MN	118.3
Denver, CO	115.2
Kansas City, MO-KS	93.1
Des Moines, IA	87.5
Oklahoma City, OK	86.8
Omaha, NE	80.8
Dallas, TX	76.1
St. Louis, MO-IL	74.2

Source: Greater Omaha Chamber of Commerce

Retail Sales

Retail sales in the MAPA region have continued to increase in recent years, though there have been a few exceptions. Douglas County, due to Omaha, has the region's largest retail market and retail tax base. Though Douglas County dominates the local retail market, Sarpy County has developed a strong and more self sufficient retail base in recent years with the addition of large outlet malls and retail centers. Table 33 below lists net taxable sales in the region by jurisdiction over the last three years and the percent change over time.

TABLE 33 – Net Taxable Sales

Jurisdiction	2010	2011	2012	2010-2011 % Change	2011-2012 % Change
Douglas Co.	\$7,884,002,093	\$8,213,178,329	\$8,165,469,737	4.2%	(0.6%)
Sarpy Co.	\$1,073,751,329	\$1,118,043,437	\$1,316,902,534	4.1%	17.8%
Washington Co.	\$119,740,990	\$127,005,231	\$147,838,236	6.1%	16.4%
Mills Co.	\$54,481,761	\$61,126,702	\$68,526,045	12.2%	12.1%
Pottawattamie Co.	\$1,102,616,112	\$997,225,688	\$1,103,978,385	(9.6%)	10.7%
MAPA Region	\$10,234,592,285	\$10,516,579,387	\$10,802,714,937	2.8%	2.7%

Source: Iowa Department of Revenue; Nebraska Department of Revenue

Sarpy and Washington counties had significant increases of their taxable sales in 2012. Pottawattamie County's turnaround is also significant in that the county experienced a significant loss in taxable sales in 2011. It is highly likely that a factor in the county's decline that year was the Missouri River flood. Regions along the river were inundated with floodwaters for a period of approximately four months. Transportation routes, especially in Pottawattamie County, were closed for most of the summer and there is no doubt that those closures impacted commerce.

Taxable sales of counties are generated primarily in the incorporated cities where retail clusters exist along major thoroughfares or in commercial zones. Table 34 lists the net taxable sales for the five largest cities in the region from 2010 to 2012 and the percent change over that time. The contribution of taxable sales from cities to their counties is also represented by percentage.

TABLE 34 – Net Taxable Sales of MAPA Region's Largest Cities

Jurisdiction	2010	2011	2012	2010-2011 % Change	2011-2012 % Change
Bellevue, NE	\$370,150,069	\$368,118,292	\$382,235,888	(0.5%)	3.8%
% of Sarpy Co.	34.5%	32.9%	29.0%		
Council Bluffs, IA	\$915,044,160	\$905,082,718	\$1,006,817,745	(1.1%)	11.2%
% of Pottawattamie Co.	83.0%	90.8%	91.2%		
La Vista, NE	\$174,451,981	\$186,820,517	\$200,843,094	7.1%	7.5%
% of Sarpy Co.	16.2%	16.7%	15.3%		
Omaha, NE	\$7,780,810,843	\$7,933,415,301	\$8,045,616,771	2.0%	1.4%
% of Douglas Co.	98.7%	96.6%	98.5%		
Papillion, NE	\$344,899,977	\$359,372,357	\$506,081,900	4.2%	40.8%
% of Sarpy Co.	32.1%	32.1%	38.4%		

Source: Iowa Department of Revenue; Nebraska Department of Revenue

Omaha's taxable sales have remained steady in the last three years and continue to comprise the vast majority of total taxable sales in Douglas County and the MAPA region. Papillion's growth was exceptionally robust in 2012, gaining 40.8 percent since 2011. Papillion is increasingly becoming a major retail center in both Sarpy County and the region. In summary, Omaha will continue to be the region's primary retail hub but other jurisdictions are putting greater emphasis on retail development.

LAND AREA & LAND USE

The MAPA region makes up an area of 2,345 square miles. Pottawattamie County is the largest County, comprising over 40 percent of land area in the region; Mills County is the smallest County, comprising approximately 10 percent of land. There are roughly 343 persons per square mile in the region according to the 2010 census, which is an increase of 14.1 percent since 2000. Table 35 provides 2000 and 2010 land area and population density data for select jurisdictions.

TABLE 35 – Land Area & Population Density

Jurisdiction	Land Area (Square Miles)	2000 Persons per Square Mile	2010 Persons per Square Mile	2000-2010 % Change
U.S.	3,531,905.43	79.6	87.4	9.8%
Nebraska	76,824.17	22.3	23.8	6.7%
Douglas Co.	328.46	1,400.6	1,574.4	12.4%
Sarpy Co.	238.99	509.3	664.6	30.5%
Washington Co.	389.96	48.1	51.9	7.9%
Iowa	55,857.13	52.4	54.5	4.0%
Mills Co.	437.44	33.3	34.4	3.3%
Pottawattamie Co.	950.28	91.9	98.0	6.6%
MAPA Region	2,345.13	300.5	343.01	14.1%

Source, U.S. Census Bureau

Though population density in the MAPA region is increasing at the county level, it is actually declining in the area that makes up the urban core. The largest and most urbanized cities in the region – Bellevue, Council Bluffs, La Vista, Omaha, and Papillion – all had land area growth between 2000 and 2010, but only Council Bluffs had an increase in population density. Sarpy County had the most significant decrease in population density at 25 percent. Land area and population trends for the aforementioned cities are outlined on Table 36.

TABLE 36 – Urbanized Area Land Growth & Population Density

Jurisdiction	2000-2010 Land Area Growth (Square Miles)	2000 Persons per Square Mile	2010 Persons per Square Mile	% Change
Bellevue, NE	2.59	3,346.4	3,162.8	(5.5%)
Council Bluffs, IA	1.37	1,471.4	1,518.8	3.2%
La Vista, NE	1.44	4,144.8	3,681.8	(11.2%)
Omaha, NE	11.39	3,370.7	3,217.9	(4.5%)
Papillion, NE	2.28	3,927.9	2,928.4	(25.4%)

Source, U.S. Census Bureau

The region in total has experienced positive population growth in the last decade, but as was discussed briefly on Pages 21 and 23, that growth is largely occurring in unincorporated areas and new subdivisions. The availability of open land and costs to develop such land have not yet reached tipping points to dissuade local jurisdictions and developers from continuing to grow along urban fringes. This is not to say infill development is not occurring in the urbanized area, but land use data and trends over time show continued outward expansion. New development on vacant and agriculture lands should continue in the near foreseeable future.

The MAPA region is distinguished by two distinct patterns of land use. Within the urban core of the region, residential development is relatively dense, with commercial and industrial development occurring along major transportation routes and at key intersections. In unincorporated areas and smaller rural communities, land use patterns follow a more traditional agricultural pattern, with lower density in residential development, highway and corridor commercial land uses, and higher concentrations of open space and agricultural uses. Map 6 on Page 62 illustrates land use by type throughout the MAPA region and Table 37 lists the approximate percentage of acreage by type for all MAPA counties. What is readily apparent is how much farm/agriculture uses dominate.

TABLE 37 – Land Use Inventory

Type	Douglas	Sarpy	Washington	Mills	Pottawattamie
Farm	40.7%	61.6%	81.1%	85.4%	89.5%
Open Space*	10.3%	8.8%	7.6%	8.3%	2.6%
Vacant	6.4%	7.0%	1.0%	0.8%	1.0%
Single-family	24.0%	13.4%	8.3%	4.0%	4.3%
Multi-family	2.1%	1.2%	0.0%	0.0%	0.1%
Commercial	3.8%	1.7%	0.2%	0.2%	0.4%
Industrial	2.1%	1.4%	0.6%	0.2%	0.2%
Public**	4.5%	2.9%	0.3%	0.4%	0.9%
Highway/Logistics/Utilities	6.1%	2.0%	0.8%	0.7%	1.1%
Total Acres in Use	188,486	142,924	245,968	581,186	281,341

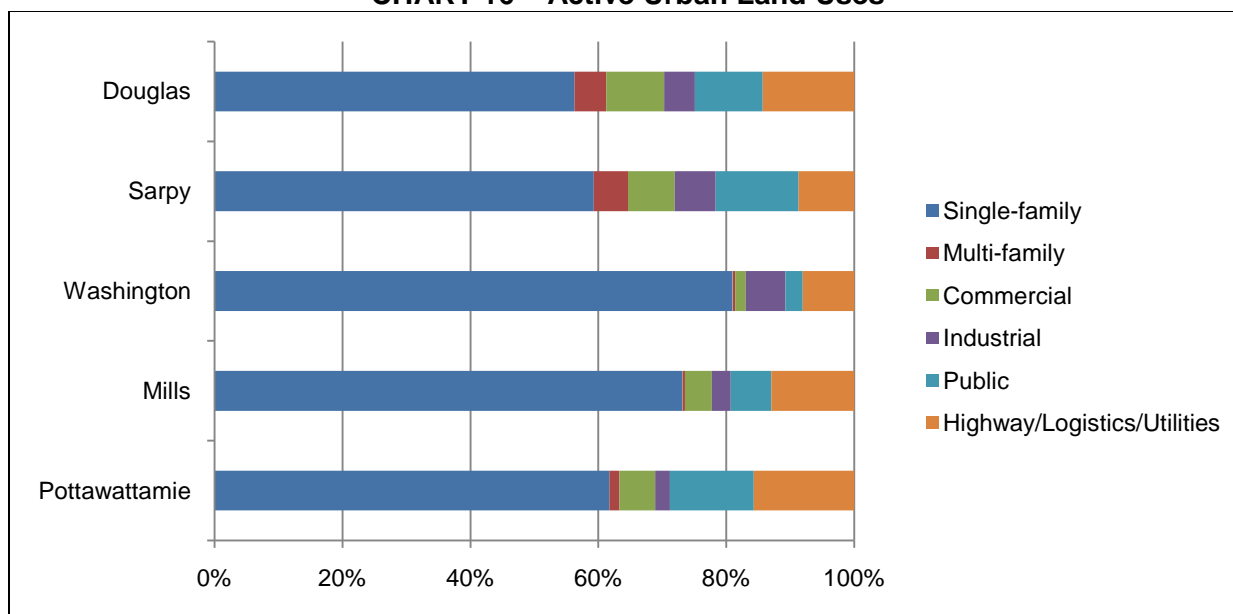
**"Open Space" refers to land that is undeveloped, in a natural condition, and not used for recreation.

***"Public" refers to all uses that are open to the public – libraries, community centers, parks, etc.

Source: MAPA Land Use Crosswalk from individual county assessor data

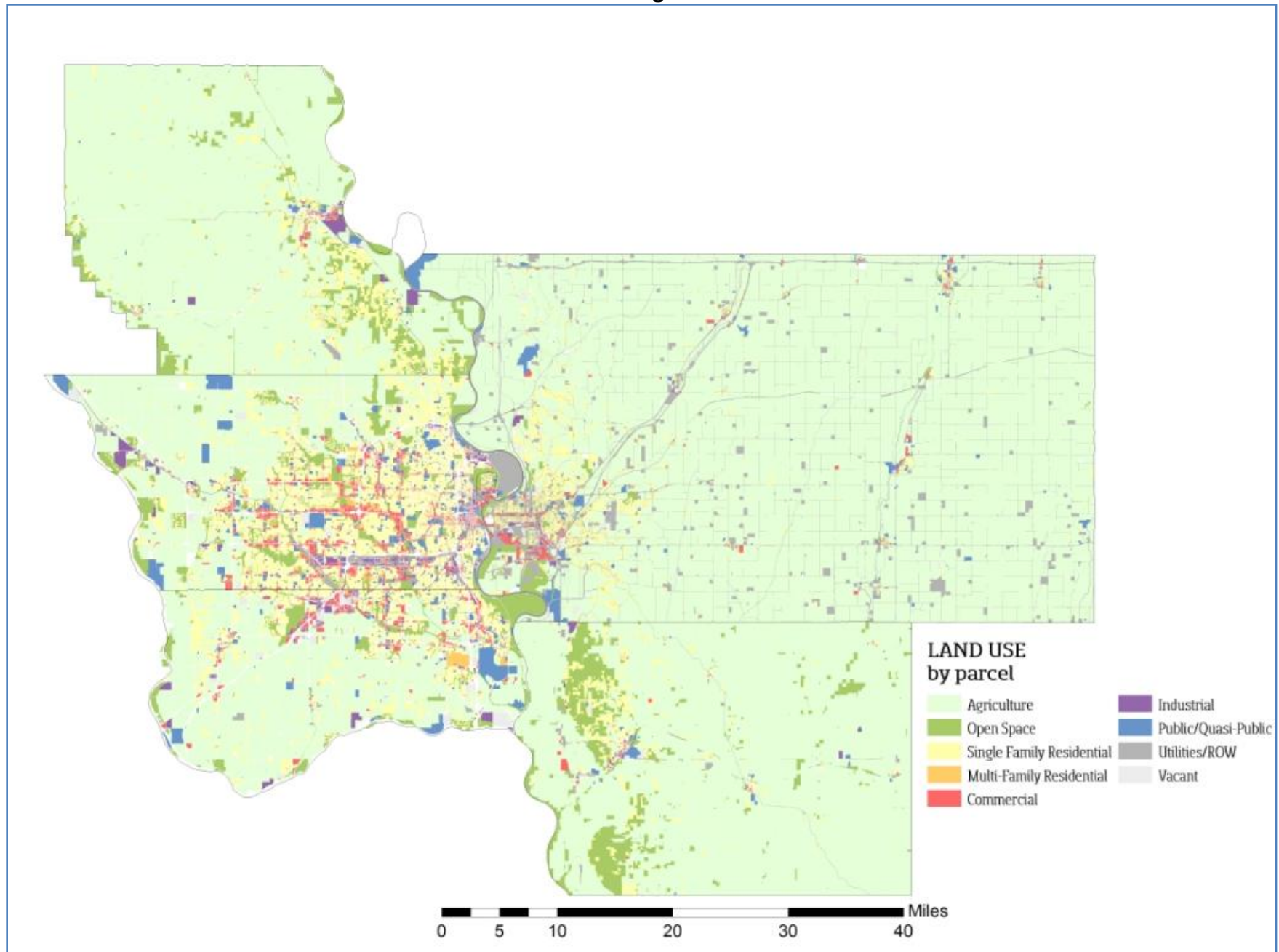
When looking at land that constitutes non-agriculture uses, single-family residential accounts for over half, and well over half in many cases, of such parcels. Chart 16 shows the distribution of active urban land uses by county.

CHART 16 – Active Urban Land Uses



Source: MAPA Land Use Crosswalk from individual county assessor data

MAP 6 – MAPA Region Land Use



KEY BUSINESS / INDUSTRY CLUSTERS

The overall economy of the MAPA region is highly diversified, thanks largely to regional assets including central location, availability and cost of energy and labor, quality of labor force, and affordable cost of living. While business and industry in the region take many forms, most of the enterprises and key production in the MAPA region can be associated with one of the following industry clusters listed below.

- **Bioscience:** The MAPA region is home to approximately 20 bioscience companies and two university research centers – University of Nebraska Medical Center and Creighton University. The region's Midwestern location has helped it create a niche in biofuels. Cargill, for instance, has a \$1 billion biofuels operation in Washington County.
- **Data Centers:** The MAPA region is home to several large data centers and information-assurance operations including CenturyLink, ConAgra Foods, Fidelity Investments, First Data, Google, PayPal, TD Ameritrade, Union Pacific, Yahoo!, and Verizon. In addition, United States Strategic Command (StratCom), the national command and control center for strategic forces around the globe, is operated at Offutt Air Force Base.
- **Defense Industry:** The MAPA region is home to Offutt Air Force Base, which houses StratCom, U.S. Air Force Weather Agency and the 55th Wing of the U.S. Air Force. The military/defense presence in the region has attracted numerous nationally recognized high-tech defense contractors to the area including Northrup Grumman, Lockheed Martin and Boeing, among others. There are approximately 10,000 military and civilian personnel working at Offutt and roughly 4,500 jobs attributed to the base's operation.
- **Financial / Insurance Services:** First National Bank, the nation's largest privately held bank holding company, is based in Omaha. Three Fortune 500/1000 companies anchored in the financial and insurance sectors are also located in the region: Berkshire Hathaway, Mutual of Omaha and TD Ameritrade. The local financial industry is supplemented by venture capital companies, investment banks and trading organizations.
- **Food Processing / Packaging:** The MAPA region benefits from being in the middle of the country's food production pipeline. Companies like ConAgra Foods, Omaha Steaks and Kellogg's maintain large operations in the region.
- **Headquarters:** There are five Fortune 500 companies headquartered in Omaha: Berkshire Hathaway, Union Pacific Railroad, ConAgra Foods, Kiewit, and Mutual of Omaha. In addition, there are five Fortune 1000 companies headquartered locally: Green Plains Renewable Energy, TD Ameritrade, Valmont Industries, Werner Enterprises, and West Corporation. More than 50 Fortune 500/1000 companies maintain major manufacturing plants or service operations in the region.
- **Information Technology (IT):** The region houses several operations and IT facilities for international corporations such as Yahoo! and Google. The Peter Kiewit Institute located on the campus of the University of Nebraska at Omaha offers a degree program for Information Science and Technology. The presence of the institute affords local companies the luxury of having ready access to highly trained and well-educated prospective employees with skills in computer science, management information systems and general IT.

- **Manufacturing:** Reliable and competitively priced energy, centralized location in the U.S., and quality transportation access account for a strong manufacturing industry in the MAPA region. The sector employees nearly 57,000 people within a 60 minute drive of Omaha. The area's manufacturing base is comprised of agriculture-related hardware, food products, chemicals and fuels, and finished goods.
- **Retail Development:** The MAPA region has an abundance of retail options, both high-end and economy priced. Higher density, pedestrian friendly outlet malls have become more prevalent in the region in the last five to ten years, deviating from the previous trend of "big-box" or "superstore" developments.
- **Transportation and Distribution:** Major U.S. markets that can be reached by automobile in a day's drive from the MAPA region include Chicago, Denver, Kansas City, Minneapolis, and St. Louis. Other markets on both U.S. coasts and Canada and Mexico can be reached from the Omaha area in two to three days via interstate and rail. The MAPA region is strategically located both nationally and throughout North America, which is advantageous for locally based transportation and distribution firms like Union Pacific and Werner Enterprises.

OPPORTUNITIES & CHALLENGES

Changing social, economic and political characteristics of the MAPA region provide opportunities as well as challenges that must be resolved to enhance economic development. The following opportunities and challenges were developed from analysis of available data, discussions with local economic development experts and stakeholders, and other sources.

Opportunities

- Financial institutions have substantial funds available to invest in area projects. These could be further enhanced by maintaining and expanding leveraging programs and by guarantees from the public sector.
- Local organizations have economic development data and resources for job training and retraining to assist in business start-ups and expansions.
- The area has a highly productive, well-trained labor force.
- The Greater Omaha Chamber of Commerce, Council Bluffs Chamber of Commerce and other economic development organizations, with support from their respective states of operation, serve as vehicles to assist local economic development projects.
- Quality educational institutions, recreational facilities and cultural activities offer a satisfying quality of life for area residents. Convention capacity, professional and amateur sports, plus tourism attractions and events draw large numbers of visitors to the region. The City of Omaha has been home to several National Collegiate Athletic Association (NCAA) championship events and maintains a continuous, long-term relationship with the NCAA as the home of the College World Series.
- Manufacturing technology partnerships are available to assist existing small and medium-sized manufacturers understand and implement plant automation and management techniques.
- An economic development network exists and includes a public/private cooperative for unified marketing of the area.
- There is a good working relationship with state level economic development agencies in both Nebraska and Iowa.
- Cost of living is below the national average and below the averages of regions of similar size and demographics.
- The area boasts an extensive transportation network that includes state and interstate highways and rail and barge networks.
- Eppley Airfield has capacity to continue to expand both passenger and cargo service. Passenger service is provided to both coasts with some direct flights. Additional general aviation services are available at airports in Blair, Council Bluffs and Millard.
- Services for international trade, such as Foreign Trade Zone No. 19, are available.
- There is an abundance of treated water sources, and adequate water treatment capacity exists to serve the needs of people and industry.
- The governmental entities in the MAPA region support cooperative agreements for services and commodities including police and emergency medical response, joint purchasing, exchange of water and sewer resources, and shared river access and use.
- Energy services are abundant and reasonably priced.
- New industrial sites and existing buildings are available at a variety of locations within the region.
- Financial resources to assist businesses such as revolving loan programs, tax increment financing and SBA programs are available.
- The MAPA region is situated in the center of four major markets: Chicago, Denver, Kansas City, and Minneapolis.

- Offutt Air Force Base, home of the United States Strategic Command (StratCom), is one of the region's largest employers and provides opportunities for state-of-the-art manufacturing and service and supply contracts for local businesses.
- The region is home to five Fortune 500 companies, all located in Omaha: Berkshire Hathaway, ConAgra Foods, Mutual of Omaha, Peter Kiewit Sons', and Union Pacific.
- The Missouri River and adjacent lands continue to be a recreational, historical and economic resource for the region.
- The region is nationally recognized for its advanced telecommunications infrastructure.
- The MAPA region has low overall housing costs, both renter and owner occupied, compared to the rest of the nation.
- The presence of I-80 and I-29 provide continued opportunities for various developments in jurisdictions where those corridors traverse.
- There are strong philanthropic resources across the MAPA region that aid in social and economic development.
- The MAPA region's largest state institution, the University of Nebraska at Omaha, offers in-state tuition rates to prospective students in portions of western Iowa.
- Alternative trade training is offered by the MAPA region's two community colleges.

Challenges

- Infrastructure in many parts of the region is inadequate to support new businesses and business expansion. Bridge capacity is also a concern with the number of commuters who travel between Nebraska and Iowa.
- The lack of large incentive packages and venture capital programs place the region at a competitive disadvantage in attracting outside investment.
- Lead cleanup sites in eastern Douglas County pose environmental concerns.
- Doing business and providing services in two states can be challenging; intergovernmental cooperation is required.
- There is limited availability of industrial park space and state-of-the-art industrial areas/buildings, particularly large-scale industrial sites served by rail.
- The number of direct (non-stop) flights to select destinations reduces the attractiveness of the region to companies with heavy U.S. travel requirements.
- Brownfields development and wetland mitigation often increase delays and costs for developers.
- The periodic threat to Offutt Air Force Base as a result of Base Realignment and Closure (BRAC) is a potential concern for citizens, communities and businesses that have a stake in the base's continued operation.
- There is a lack of affordable housing throughout the region, especially where new job centers are located.
- The lack of westward mass transportation routes in the Omaha area is a detriment to those looking for work outside of eastern regions of the city. Current public transportation efforts in the region suffer from fragmented leadership from several competing public and private interests.
- There is limited mixed development housing in the MAPA region, which would help eliminate low-income pockets.
- Sewer rates are increasing regularly due to EPA's mandate that Omaha remediate combined sewer overflows. These rate increases pose a potential hardship to lower-income residents and may dissuade industries from maintaining or relocating operations in the region.

- There is a disconnect between current job training needs and offerings in the region, both in area high schools and colleges/universities- current job training is not matching the skills needed for 21st century jobs.
- Housing costs are not in tune with current working wages, and there is a disconnect between housing costs and actual values.
- Long-term water supply/rights continue to be an issue in portions of the MAPA region, considering the importance of agriculture to the local economy.
- Immigrants with professional skills and backgrounds have difficulty finding opportunities in the MAPA region. Cultural and language barriers contribute to the problem, but social factors are largely responsible for this challenge.
- There is a continued lack of resources (i.e. microlending) and incentives for small businesses.
- Technology services are improving, but reliability and affordability of high-speed internet and other telecommunications services in rural areas remains an issue.
- Economic conditions and competing business ventures have created redevelopment challenges in several areas of the region, including the Crossroads Mall area in central Omaha, the South 84th street corridor in La Vista, and the Fort Crook Road corridor in Bellevue.
- Most economic incentives available in the region are relatively rigid and do not adequately address economic development needs in distressed areas. The absence of enterprise zone benefits in Nebraska and the inability to create Sales Tax Increment Finance districts in the region are two examples of potential incentives that could yield significant benefits in areas where private investment is more difficult to attract.
- The region is not immune to business closures and struggles encountered by small businesses.
- The challenges of an aging workforce are looming in the MAPA region. Over the next several years, it is anticipated that the number of workers leaving the labor force will equal, if not exceed the number of new entrants, creating staffing capacity concerns and gaps in organizational leadership.

SECTION IV
REGIONAL ECONOMIC PRIORITIES

CEDS VISION STATEMENT

The MAPA region is a dynamic, five-county, two-state region embracing growth and diversity where we enjoy a safe, family-friendly, and healthy lifestyle. The MAPA region will build upon the region's economic strengths to stimulate local economies, sustain the positive economic momentum of today and help the region withstand the inevitable economic downturns. The region will work to minimize poverty, especially in distressed areas in the region. The MAPA CEDS reflects the region's goal to implement a successful economic development planning process that addresses its economic problems and uses its resources to fulfill its economic potential.

ECONOMIC DEVELOPMENT GOALS & STRATEGIES

Economic development goals and strategies for the MAPA region are found below. The MAPA EDD Strategy Committee developed these goals and strategies based on the opportunities and constraints found within the region, and based on information found in capital improvement plans, strategic plans, and comprehensive plans prepared by member jurisdictions. The order in which they are numbered does not imply importance by ranking.

GOAL A: RETAIN BUSINESS AND INDUSTRY AND ENCOURAGE EXPANSION.

Strategies:

- 1) Assist the various area chambers and economic development groups in their respective surveys of existing businesses and industries to determine expansion plans and projected employment and training needs. Encourage all agencies to work together with businesses. Acquaint managers with available assistance programs.
- 2) Assist in the promotion of financial, management and training assistance programs available through small business development centers, community colleges, and public and private resources.
- 3) Actively work to make available local, state and federal resources for business expansion/retention programs in the region.
- 4) Encourage local businesses to promote the area and persuade associated businesses to locate in the region.
- 5) Provide additional resources for identification, acquisition and development of industrial sites.

GOAL B: EXPAND THE MANUFACTURING BASE AND DIVERSIFY INTO OTHER ECONOMIC SECTORS.

Strategies:

- 1) Assess the region's resources, advantages and limitations as a guide to determine appropriate opportunities for new and existing businesses.
- 2) Inventory types of goods and services provided by local businesses and continue to provide information to promote and expand marketing opportunities.
- 3) Continue to work with existing economic development organizations to market assistance programs for new and existing businesses.
- 4) Continue developing local capacity to assist new and existing business efforts in the areas of infrastructure improvement, telecommunications, construction, fixed assets and working capital financing.

- 5) Encourage development and marketing of large-scale regional industrial parks and regional business/technology parks.
- 6) Identify local, state, federal and private funding sources for capital improvements, advertising and promotion of the area.
- 7) Promote use of local and state financing tools to assist in attraction of prospective employers and expansion of existing business.
- 8) Continue redevelopment of riverfront on both sides of the Missouri River.
- 9) Support and encourage small business entrepreneurship.
- 10) Actively support efforts to assemble necessary land for redevelopment activities in identified job centers.
- 11) Support development of policies and financial tools that balance the economic feasibility of pursuing redevelopment as an alternative to new development on urban fringes.

GOAL C: PROVIDE MORE OPPORTUNITIES FOR GROWTH AND REDEVELOPMENT IN AREAS OF THE REGION EXPERIENCING RELATIVELY HIGH POVERTY RATES, UNEMPLOYMENT RATES, DISINVESTMENT, LACK OF PRIVATE INVESTMENT, AND ENVIRONMENTAL CHALLENGES.

Strategies:

- 1) Identify areas subject to proposed disinvestment and work with businesses to determine problems and provide assistance or incentives that will help them to stay and grow in their current locations rather than leave the area.
- 2) Work with businesses in these areas to determine their labor needs so that training programs can be developed at local schools and training centers.
- 3) Develop data to target areas that are underserved with opportunities for jobs, especially jobs that pay a living wage.
- 4) Seek out and provide information to businesses whose work could be done in underserved areas by local labor.
- 5) Improve viability of commercial and retail enterprises in distressed areas.
- 6) Encourage the use of policies and/or incentives that redevelop brownfields or environmentally challenged sites to make best use of existing infrastructure.

GOAL D: PROVIDE INFRASTRUCTURE, INCLUDING STATE-OF-THE-ART TECHNOLOGY, TO SUPPORT BUSINESS GROWTH AND EXPANSION.

Strategies:

- 1) Inventory infrastructure to determine capabilities and limitations for business growth.
- 2) Pursue funding sources for construction, maintenance and expansion activities.
- 3) Prepare regional capital improvement plan and map.

- 4) Encourage regional collaboration to improve infrastructure capacity.
- 5) Identify and develop “shovel-ready” sites for economic development activity.

GOAL E: ENHANCE PUBLIC-PRIVATE PARTNERSHIPS TO ADDRESS ECONOMIC DEVELOPMENT NEEDS IN THE REGION.

Strategies:

- 1) Improve intergovernmental cooperation in economic development among local, regional, state, and federal levels.
- 2) Expand use of revolving loan fund programs and encourage economic opportunities for minority and women-owned businesses.
- 3) Encourage local governments to work together to develop an Industrial Site Readiness Plan for prospective development.
- 4) Promote involvement of private organizations and individuals in devising economic development strategies. Improve access to and awareness of processes by private organizations, regardless of their level of direct investment in projects.
- 5) Assist developments with permitting process to encourage sequential permitting. Work with local, state and federal agencies to find a way to streamline their procedures.
- 6) Help economic development organizations finance and administer job training and other forms of assistance to businesses locating in the region.
- 7) Assist various groups involved in economic development in accessing workforce information and in the design of effective programs.
- 8) Support initiatives and programs that train, retrain and upgrade skills of area employees in order to broaden the skill set of the region’s workforce.
- 9) Encourage increased investment by private and philanthropic entities in economic development activities.

GOAL F: PROMOTE QUALITY OF LIFE OPPORTUNITIES.

Strategies:

- 1) Publicize educational, recreational, cultural and other quality of life opportunities to residents as well as to potential employers and employees.
- 2) Facilitate coordination of quality of life services and programs.
- 3) Promote efforts to expand availability of housing, especially affordable housing.
- 4) Increase availability of public transportation.
- 5) Increase availability and quality of area health care facilities.

GOAL G: STRENGTHEN ECONOMIC PLANNING AND MANAGEMENT CAPABILITIES OF RURAL LOCAL UNITS OF GOVERNMENT IN THE REGION.

Strategies:

- 1) Continue development and support of long-term economic strategies for rural revitalization.
- 2) Collect information on area trends and conditions to determine needs and respond to changes.
- 3) Provide technical assistance as requested.
- 4) Encourage ongoing training for local elected officials and appointees to maximize effective planning and economic development practices throughout the region.

GOAL H: DEVELOP A REGIONAL DEVELOPMENT / REDEVELOPMENT ACTION PLAN.

Strategies:

- 1) Identify areas for re-development and sources of funding assistance.
- 2) Develop a regional GIS database.
- 3) Encourage periodic updates of local comprehensive/development plans.
- 4) Develop regional transportation and land use maps.

GOAL J: IMPROVE TRANSPORTATION ACCESSIBILITY IN THE MAPA REGION.

Strategies:

- 1) Improve public transportation access to emerging job centers.
- 2) Encourage use of mass transit to improve job access from distressed areas with concentrations of underemployed workers.
- 3) Update public transportation networks to reflect shifts in demographics and demand for transit services.

PROGRAMS & PROJECTS

The MAPA CEDS establishes priority programs and projects for implementation. The CEDS is a prerequisite to qualify for assistance under EDA's Public Works, Economic Adjustment and Planning programs. Numerous individuals and groups, both public and private, at the regional, county, city and neighborhood levels are involved in economic development within the MAPA region.

Criteria for Selecting Priority Projects

The following questions serve as the guideline to assist in the rating of projects and to determine the relative importance of each one.

1. How many permanent and part-time jobs are directly created and/or retained within the region as a result of this project?
2. What will the direct economic impact of the project be for the local jurisdiction and the MAPA region?
3. Is there a clearly demonstrated need for the project?
4. Are there matching funds for the project?
5. Has the preliminary engineering been completed?
6. Is the project located in an area suffering from high levels of economic distress?
7. Is the project prioritized by another program or jurisdiction?
8. What are the indirect economic and job creation benefits to be realized as a result of this project?
9. Will the project enhance the attractiveness of the region or improve the "quality of life" in the region?
10. Is there a strong local commitment to the project?
11. Which CEDS goals or objectives will be addressed upon the completion of this project?

These criteria are purposely broad to provide flexibility of the prioritization process and, thus, allow local input and permit subjective contributions. The CEDS Committee evaluated the projects and rated them through consensus at their meetings after each solicited input from their respective jurisdictions and organizations.

The section below contains a list of priority projects and an inventory of anticipated economic development projects throughout the region. The Economic Development Project List contains all identified projects designed to spur economic development in the region. The projects were collected from local governments in the region and from EDD Strategy Committee representatives, which determined the jurisdictional need for projects, the timeframe for initiation and/or completion, the estimated costs for each project, and potential funding sources. Each project meets one or more of the CEDS goals for the region listed on Pages 69 through 72. The priority list was developed based on submitted projects and the criteria for judging projects.

Priority Projects – 2014

The following priority projects were selected by the Strategy Committee after review of submitted local jurisdictional projects for the current or upcoming project year. Fourteen projects were selected for this plan update based on the previously outlined criteria. Identified projects are not ranked in any particular order.

Project: Interstate 29 South Economic Development Corridor

Jurisdiction(s): *Mills County, Pottawattamie County, City of Council Bluffs*

Goal and Strategy: *Goal B, Strategies 4 & 5; Goal D, Strategies 2 & 5*

Project Overview: Project stakeholders have completed an infrastructure and land use study of a large area extending from the Highway 275 south to the Highway 370 interchange on Interstate 29 in Mills County to determine the development potential of the area and to determine requirements for storm water management in the corridor. The study revealed high potential for successful industrial development in the area but also indicated that infrastructure would cost approximately \$70 million for plan implementation. This project would be included as a segment on the East Beltway in Pottawattamie County and would provide the region with large industrial sites with rail and interstate access. Evidence of overall corridor potential can be found with developments in progress on land deemed currently ready for use, as three value-added agriculture ventures, a Google data storage facility, and an energy generation facility are already locating in the corridor. Overall, this project will add 2,000 acres of industrial land to the MAPA region.

Project: U.S. Highway 34 Bridge Corridor Development

Jurisdiction(s): *Mills County, Sarpy County*

Goal and Strategy: *Goal B, Strategy 4; Goal D, Strategy 4; Goal J, Strategy 3*

Project Overview: Over the last several years, local governments in Nebraska and Iowa and the transportation agencies of both states have collaborated to pursue funding for a new bridge over the Missouri River that would provide a more direct connection between U.S. Highway 34 in southwest Iowa and southern Sarpy County. Construction of the four-lane, \$137 million bridge began in 2010 and is expected to be completed by spring of 2014. Completion of the project will improve traffic flow and create economic development opportunities throughout southwest Iowa and southern Sarpy County, as well as aid in the creation of the proposed Mills County regional port authority.

In conjunction with construction of the new bridge, public and private stakeholders in southwest Iowa are reviewing the feasibility of a regional port authority in Mills County. Port authorities, which are quasi-governmental special purpose districts, operate transportation terminals and provide storage and security for industrial and manufacturing enterprises. The State of Iowa passed legislation in 2005 that allows for entities such as port authorities to be established, but there is no such district within the MAPA region. Mills County possesses advantages that would make the development of a port authority worth considering, which include proximity to major rail networks, Interstate 29, and the Missouri River. The initial findings of the Gateway Commerce Port Authority Study in Pottawattamie County state that the cost of such a project over the next 30 years would approach \$1.5 billion. However, a port authority could bring tens of thousands of jobs and attract significant financial investment to the region. Mills County would benefit from a port authority study, but additional site-specific recommendations and general marketing and site development strategies for the new U.S. 34 corridor still need to be developed.

Project: Platteview Road Corridor and PCS Nitrogen Site Redevelopment

Jurisdiction(s): *Sarpy County*

Goal and Strategy: *Goal B, Strategy 5; Goal C, Strategy 6; Goal D, Strategy 5*

Project Overview: The Platteview Road corridor, located immediately west of the new U.S. 34 bridge and near U.S. 75, has been identified regionally as a prime area for industrial development. This area is considered prime because it could accommodate rail infrastructure, greater traffic volume and industrial uses. The new U.S. 34 bridge is spurring economic development proposals, and Sarpy County and its cities are working to develop sub-area plans

to be integrated into local comprehensive plans in order to determine best land uses in the corridor.

A key industrial site in this area is the now closed PCS Nitrogen Plant south of Bellevue. The site has been identified by the Sarpy County Economic Development Corporation as a prime site for brownfields redevelopment and new industrial activity based on a number of factors, including proximity to key transportation corridors and availability of rail service. Following land assembly and brownfields mitigation activities, it is anticipated that 1,000 acres of land would be available for a combination of wetlands restoration, wildlife habitat restoration, and rail-served industrial activity. Environmental studies, including an EPA-funded study, concluded that land surrounding the former plant site is safe and clear for redevelopment. The preliminary cost estimate for site acquisition and development is \$25 million.

Project: Joint Wastewater Projects

Jurisdiction(s): *Sarpy County, City of Omaha*

Goal and Strategy: *Goal D, Strategy 4*

Project Overview: Numerous efforts are in progress to regionalize the provision of wastewater treatment services in the MAPA region. The most significant regional wastewater initiative is being undertaken in Sarpy County, where planning is ongoing on a regional wastewater system that will serve three watersheds covering nearly half the county's land area, a large percentage of which is presently not developed. Cost estimates for infrastructure, including interim wastewater facilities, exceed \$180 million, with implementation planned in phases over the next 20 years.

Additionally, the City of Omaha developed a Long Term Control Plan (LTCP) that addresses the water quality and human health concerns associated with Combined Sewer Overflows, or CSOs. The combined sewer system is generally located between the Missouri River and 72nd Street, ranging from Harrison Street to the south to I-680 to the north. It includes over 51 square miles (33,000 acres and 7,300 blocks) and 32 CSO outfalls. The city, under orders from state and federal regulatory agencies, is working to construct new separated sewer pipes and various water distribution and treatment systems. Control projects are currently underway in phases, though implementation of the LTCP will not be finalized until October 2024. The total project cost is \$1.7 billion.

Project: Heartland 2050 Regional Vision

Jurisdiction(s): *Omaha-Council Bluffs MSA, including cities, counties, non-profits, public housing agencies, economic developers, etc.*

Goal and Strategy: *Goal E, Strategies 1 & 4*

Project Overview: MAPA is in the intermediate stages of assessing the long-range future of the MAPA region and the greater Omaha-Council Bluffs metropolitan area. The goal is to work with citizens, local governments, civic leaders, educators, business owners, and others to envision growth and development in the next 37 years to 2050. MAPA and partners are leading a regional visioning process to identify issues and opportunities facing the region. This visioning endeavor will hopefully guide future development proactively rather than reactively.

Heartland 2050 is being funded largely by a \$2.045 million grant through the Office for Sustainable Communities, a partnership between HUD, DOT and EPA. MAPA is implementing the project using the framework set forth by the Office for Sustainable Communities and other best practices, which includes scenario modeling and values laddering. Project implementation began in 2011 and a regional vision for the eight-county MSA should be completed in 2014.

Project: South Omaha Development Project Implementation

Jurisdiction(s): *City of Omaha*

Goal and Strategy: *Goal B, Strategy 11; Goal C, Strategy 5*

Project Overview: The South Omaha Development Project is a collaborative effort among the Omaha Chamber, Latino Center of the Midlands, business leaders, and other key stakeholders to develop a business investment strategy for the next 20 years. Goals of the South Omaha Project include attracting and retaining businesses and residents, strengthening South Omaha's regional role, and capitalizing on South Omaha's unique history and culture. The South Omaha study area is bordered by Center Street (potentially Leavenworth Street) on the north, Harrison Street on the south, 42nd Street on the west, and the Missouri River on the east. Following completion of the development plan for the area, one of the first implementation steps is to complete cleanup of deteriorating sites.

The Omaha Brownfields Coalition, consisting of MAPA, Metropolitan Community College, and the Pappas-Missouri River Natural Resources District, has been awarded an \$835,000 Brownfields Assessment Grant from EPA to address risks and development needs in a portion of the South Omaha Redevelopment Area (SORA). The grant allows coalition partners, along with the Omaha Chamber's South Omaha Development Project and numerous community organizations, to take significant steps to address South Omaha brownfields, which are properties where known or suspected hazardous substances, pollutants or contaminants are present. The properties often become blighted as real or perceived contamination prevents investment and redevelopment.

Project: South 24th Street Corridor Development – Council Bluffs

Jurisdiction(s): *City of Council Bluffs*

Goal and Strategy: *Goal B, Strategies 7 & 11; Goal D, Strategies 2 & 5*

Project Overview: Building on current retail and commercial development projects along the western portion of the city's I-80 corridor, Council Bluffs seeks to improve traffic flow and safety to this emerging commercial gateway. The final phase, estimated at \$6.3 million, will be completed in 2013. Project activities include roadway improvements and acquisition and redevelopment of older properties north of I-80. Completion of this project will facilitate continued development of the Marketplace shopping area, commercial properties near the Mid-America Center, and several other properties prime for retail and commercial growth.

Project: University of Nebraska Medical Center Expansion / Potential Saddle Creek Road Relocation

Jurisdiction(s): *City of Omaha, University of Nebraska Medical Center*

Goal and Strategy: *Goal B, Strategies 8 and 11*

Project Overview: The Saddle Creek Road Relocation Feasibility Study analyzed potential options for relocating Saddle Creek Road between Leavenworth and Cuming Streets. Traffic congestion and flooding from heavy rains are detrimental to development activity and property values in the area. Two options were identified in the study: Option 1 would move Saddle Creek Road to a location immediately west of and parallel to the swale. Option 2 would move Saddle Creek Road farther to the west than Option 1 and provide the opportunity for an expanded contiguous campus for UNMC. Both alternatives address flooding issues, provide a green space and trail, improve traffic flow, improve pedestrian safety, and could serve as a catalyst for redevelopment. UNMC has begun implementation of a 10-year, \$250 million expansion and the addition of a new \$370 million cancer treatment and research center. At some point UNMC will require additional land that is safe and viable for new construction.

Project: Dana College Campus Redevelopment

Jurisdiction(s): *City of Blair*

Goal and Strategy: *Goal C, Strategy 1*

Project Overview: In 2010 Dana College was forced to close after the institution lost its regional accreditation following the purchase by a group of investors. Hundreds of students and faculty were forced to leave the area to attend other colleges or find different opportunities. Many local employers lost seasonal and part-time employees who attended the college.

Midland University, located in Fremont, Nebraska, acquired the 151-acre campus in July 2013. Midland University intends to reopen the Dana College campus as a satellite institution in the next two to three years. A capital campaign has been launched to raise \$11 million for deferred maintenance and start-up costs. Completion of the capital campaign along with approval from the university's accrediting commission will be required before the campus can open the door to students in the fall of 2015 or 2016.

Project: StratCom Headquarters

Jurisdiction(s): *Sarpy County, City of Bellevue, Offutt Air Force Base*

Goal and Strategy: *Goal A, Strategy 6*

Project Overview: U.S. Strategic Command (StratCom) is currently constructing a new 915,876-square-foot headquarter facility to accommodate current and expanding duties, which include nuclear defense, space and cyberspace monitoring, missile defense, intelligence, reconnaissance, and surveillance. StratCom's current headquarters, built in 1957, has become increasingly antiquated and can no longer support the variety of advanced technological support systems. Completion of the \$524 million project, not counting hundreds of millions of dollars for technology, is expected in 2016. The Air Force has estimated that the project will provide 400 construction jobs and an additional 100 support jobs during the building process. The implementation of this project has solidified the continued presence of Offutt and StratCom in the metropolitan area for the foreseeable future. Offutt is the area's largest employer, providing an estimated \$2.5 billion annual economic impact.

Project: Crossroads Village

Jurisdiction(s): *City of Omaha*

Goal and Strategy: *Goal B, Strategies 7 & 11; Goal C, Strategy 5*

Project Overview: Crossroads Mall, which opened in 1960, will be mostly demolished and replaced by an open-air shopping center with 60 to 80 new stores, 200,000 square feet of office space, a 135-room hotel, a public library, and a two-acre public park. Over the years, Crossroads Mall has experienced a high vacancy rate (currently near 70 percent) due to the proliferation of other malls and shopping centers. The \$350 million project will reconfigure and be contained on most of the existing mall's 45 acres, and the City of Omaha has taken steps to make the area eligible for tax credits. The location of Crossroads Mall is considered prime by city and economic development officials due to its centralized location. Implementation of the project is scheduled for April 2015.

Project: Vision 84 Redevelopment

Jurisdiction(s): *Sarpy County, City of La Vista*

Goal and Strategy: *Goal B, Strategy 11; Goal C, Strategy 5*

Project Overview: In 2009 the City of La Vista conducted a visioning process titled "Vision 84" to determine the feasibility of redeveloping South 84th Street. For much of the city's history, this one-mile stretch of commercial land represented the community's central business district. Changes in the regional retail market in recent years resulted in the closure of three "big box" retailers along 84th Street, leaving nearly 300,000 square feet of vacant retail space. The Vision

84 process was undertaken to determine the best use of that vacated space and also to develop a strategy that would trigger redevelopment in advance of further economic decline in the area. The resulting plan recommends conversion of the commercial corridor into a more mixed-use development. Key impediments to implementation of the vision include property acquisition costs, width and classification of 84th Street, and the need to further refine the strategy to attract developers. Overall, the project will cost tens of millions of dollars and will require a significant public-private partnership over the next 10 to 20 years for the vision to be fully realized.

Project: Missouri River Levee Accreditation

Jurisdiction(s): *Mills County, City of Council Bluffs*

Goal and Strategy: *Goal B, Strategies 5 & 8*

Project Overview: The 2011 Missouri River flood placed significant strain on levees for approximately four months. There are levees adjacent to the Missouri River that require re-certification from FEMA, but levee managers do not have the resources or capabilities to implement re-certification. The re-certification process is costly and time consuming (likely four years or more). In Council Bluffs alone, the cost to pay for re-certification is \$34 to \$62 million. The implications of unaccredited levees include mandatory purchase of flood insurance for any federally backed loan and development restrictions in the floodplain.

Project: Ames-Locust Industrial Park

Jurisdiction(s): *City of Omaha*

Goal and Strategy: *Goal A, Strategy 5*

Project Overview: There is a proposal in the City of Omaha's Capital Improvement Program to develop an industrial park between Ames Avenue and Locust Street, near railroad tracks that run east of North 16th Street. The proposed development would be the Omaha area's first industrial park in roughly a decade. The Ames-Locust Industrial Park would stretch across 60 to 70 acres and is projected to cost \$8.7 million. The site is ideally located in the city as it is close to interstates and rail lines. The project, if fully realized, could be a boon to an area of Omaha and the MAPA region that has experienced long-term economic disinvestment and has a large segment of people in need of jobs.

Project: North Omaha Village Zone Revitalization Plan

Jurisdiction(s): *City of Omaha*

Goal and Strategy: *Goal B, Strategy 11; Goal C, Strategy 5*

Project Overview: In 2011 the Omaha Planning Board and City Council unanimously approved the North Omaha Village Zone Revitalization Plan to become part of the City of Omaha Master Plan. The plan identifies iconic and transformational projects that have the potential to be catalysts for revitalization in North Omaha. The plan is a collaboration of numerous partners including the Empowerment Network, Alliance Building Communities, Nebraska Investment Finance Authority, among others. The following areas are identified as key nodes of opportunity: 16th and Cuming, 24th and Lake, 30th and Lake/Parker, and Malcolm X/Adams Park. These zones have unique economic, historical and cultural characteristics from which to plan and implement progressive redevelopment initiatives.

TABLE 38 – Economic Development Project Inventory (Announced Projects Only)

Project	Jurisdiction	New or Expanding	Estimated Completion Date	Estimated Cost	Anticipated Economic Development Outcomes
Douglas County					
Doane College- Opening of Omaha campus	Omaha	New	January 2014		New post-secondary education institution
Fairbanks Building	Omaha	New	January 2014	\$2.6 million	12 new apartments & mixed-use space
Old Mill Rehabilitation	Omaha	New	February 2014	\$6.3 million	50 added jobs
Children’s Respite Care Center	Omaha	New	February 2014	\$6.5 million	
Loveland Centre	Omaha	New	March 2014		44,000 sq-ft retail/restaurant development
UNO- Community Engagement Center	UNO	Expanding	March 2014	\$24 million	
Tenaska, Inc.	Omaha	New	April 2014	\$20 million	100 added jobs
1501 Jackson- Mixed-use development	Omaha	New	May 2014	\$14 million	New mixed-use development
H&M- Retail store at Westroads Mall	Omaha	New	May 2014		50 added jobs
Methodist Hospital- New Surgical Center	Omaha	New	May 2014	\$75 million	
Westroads Mall- Renovation & updates	Omaha	Expanding	May 2014		Multi-million dollar renovation of major retail center
Gordmans- HQ construction at Aksarben Village	Omaha	New	June 2014	\$28 million	100,000 sq-ft headquarter facility
Madonna School- New addition	Omaha	Expanding	July 2014	\$4.3 million	
Lauritzen Gardens- Conservatory construction	Omaha	New	August 2014	\$20 million	
Walmart Neighborhood Market	Omaha	New	September 2014		Redevelopment of formerly vacant retail site
Lerner Building	Omaha	New	October 2014	\$5.48 million	
Nelnet Inc.- Customer care center	Omaha	New	December 2014		250 added jobs
Prime Communications	Omaha	Expanding	February 2015		50 added jobs
Girls Inc.- Gym & health center	Omaha	Expanding	March 2015	\$15 million	
The Travelers Companies, Inc.- Data center	Omaha	New	April 2015	\$200 million	30 added jobs
Multi-sport complex at Tranquility Park	Omaha	New	July 2015		Proposed 80-acre multi-sport complex
UNMC – New College of Pharmacy & Center for Drug Discovery building	UNMC	New	July 2015	\$35 million	
Madonna Rehabilitation Hospital – West Omaha facility	Omaha	New	August 2015	\$60 million	800 added jobs
KETV relocation to Burlington Station	Omaha	Expanding	September 2015		Renovation of historic building
Together Omaha- Headquarter renovation	Omaha	Expanding	December 2015	\$2.3 million	
DirectCall	Omaha	Expanding	December 2016		100 added jobs
Waitt Plaza at Aksarben Village	Omaha	New	2016	\$50 million	8-story office building with retail space
Sarpy County					
Fidelity Investments- Data center	Papillion	New	March 2014	\$200 million	
Pediatric Therapy Center	Papillion	Expanding	May 2014		10 added jobs
Fontenelle Forest Nature Center	Bellevue	Expanding	October 2014	\$1 million	
U.S. Strategic Command- HQ construction – Phase 1	Offutt AFB	New	September 2016	\$120 million	
Clearwater Estates- New housing development	Bellevue	New	December 2016		Construction of 136 estate-sized homes

Washington County					
Little Blossoms Child Care & Preschool	Blair	New	March 2014	\$1.1 million	3-4 added jobs
Blair Community Library & Technology Center	Blair	Expanding	December 2015	\$4.6 million	
Mills County					
Bomgaars- Retail store	Glenwood	New	April 2014	\$1.5 million	20 added jobs
Mills County Jail	Glenwood	New	June 2014	\$6.4 million	11 added jobs
Pottawattamie County					
Google- Server farm	Council Bluffs	Expanding	March 2014	\$200 million	
Treynor Family Recreation Complex	Treynor	New	June 2014	\$3.2 million	
Bluffs Towers- Renovations	Council Bluffs	Expanding	July 2014	\$5.1 million	
Playland Park	Council Bluffs	New	August 2015	\$60 million	25-acre mixed-use development

SECTION V
CEDS PLAN OF ACTION

IMPLEMENTATION STRATEGY

The assessment of current economic conditions and identification of key economic development projects is critical to the usefulness of the CEDS and the planning process, but implementation can prove to be challenging. The Strategy Committee realizes that its influence and that of the MAPA EDD Governing Board is restricted with respect to legislative and executive authority needed to initiate and finance the physical projects identified. However, MAPA and its members can offer written support and assistance with identification of potential partnerships needed to expedite implementation of those projects, and can assist communities through advocacy of projects identified by local leaders and included herein.

However, MAPA is positioned to take a more active role in the implementation of non-physical projects and programs in the region. Many of the goals and strategies identified by the Strategy Committee and its constituents can be best addressed through collaboration and strategic planning initiatives. The following table lists potential or planned economic development planning initiatives in the MAPA region, along with corresponding CEDS goals and key partners for implementation.

TABLE 39 – Implementation Activities

Goals: (A) Retain / Expand Business & Industry; (B) Diversify Regional Economy; (C) Redevelopment & Revitalization; (D) Infrastructure; (E) Public / Private Partnerships; (F) Quality of Life; (G) Build Capacity in Rural Governments; (H) Regional Planning Coordination; (J) Transportation Accessibility				
Goal	Project/Program	Implementation Timeframe	Key Partners	EDA Assistance
A	Development of Local Business Incubators (Physical and virtual)	2011-2014	Iowa Western Community College, Metropolitan Community College, Regional Small Business Development Centers	TA, Planning
B	Regional Jobs and Innovation Accelerator Program Implementation	2011-2014	City of Omaha, Omaha Chamber of Commerce,	TA, Economic Adjustment
C	Coordination of MAPA Brownfields Coalition	2011-2014	MAPA, Metropolitan Community College, Papio-NRD, City of Omaha, Douglas County, Omaha Chamber of Commerce, EPA	
C	Neighborhood Business District Strategic Plan	Ongoing	Omaha Chamber of Commerce, Local Neighborhood Associations	TA, Planning
D	Long Range Transportation Planning	Ongoing	MAPA, Iowa DOT, NE Dept. of Roads, FHWA, FTA	
D	Identify & Assemble Land for 150-Acre Power Park	2014-2016	Sarpy County Economic Development Corporation (EDC)	TA, Public Works
D	Identify & Assemble Land for 250-Acre Rail-Served Industrial Park	2014-2016	Sarpy County EDC	TA, Public Works
D	Identify & Assemble Land for 250-Acre Warehouse / Distribution Site	2014-2016	Sarpy County EDC	TA, Public Works
D	Identify Space / Buildings for Manufacturing & Industrial Use in North Omaha	2014-2016	MAPA, Omaha Economic Development Corporation, Omaha Chamber of Commerce	TA, Planning, Public Works
D	Development of Airport II Industrial Park	2014-2019	City of Omaha, Omaha Chamber of Commerce	TA, Public Works
D	Carter Lake Storm Sewer Project	2012-2014	City of Carter Lake	Economic Adjustment
D	Council Bluffs Pump Station Project	2012-2014	City of Council Bluffs	Economic Adjustment

D	Pottawattamie County Levee District Formation Feasibility Study	2012-2014	Pottawattamie County Board of Supervisors	Economic Adjustment
D	Mills County Levee Accreditation Study	2012-2014	Mills County Board of Supervisors; Mills County Economic Development Foundation	Economic Adjustment
E	Regional Economic Development Forums	Ongoing	MAPA, Economic Development Staff, City Staff, Developers, Consultants	TA, Planning
F	Support Planning & Development of Regional Trails	Ongoing	MAPA, Iowa DOT, Iowa DNR, NE Game & Parks, NE Dept. of Roads, Private Foundations	
G	Coordinate Nebraska / Iowa Regional Orthophotography Consortium (NIROC)	Ongoing	MAPA, City and County Governments	TA
H	MAPA Community / Economic Development Website Management	Ongoing	MAPA, Member Agencies	TA
H	Long Range Regional Vision	Ongoing	MAPA, Member Agencies	TA, Planning
J	Regional Transit Study	Ongoing	MAPA, Metro Transit, City of Omaha	

COMMUNITY & PRIVATE SECTOR INVOLVEMENT

The process of establishing the MAPA EDD and developing the CEDS for the region has been successful largely due to contributions from community and private sector leaders. In order for the MAPA EDD to function efficiently and effectively, and to create a coordinated economic development dialogue, continued involvement of the Strategy Committee and MAPA staff as facilitators will be critical. Many of the activities identified by the MAPA EDD in its Partnership Planning program scope of work will aid in the gathering and sharing of information leading to collaboration across jurisdictional boundaries.

With respect to implementation of specific projects and plans, many of the physical projects listed in the CEDS cannot be completed without private investment or public/private partnerships. More importantly, the completion of significant local and regional planning initiatives cannot be successful without input and participation from citizens and business leaders. Transparency in processes and in public notification will be encouraged and facilitated by MAPA staff whenever possible.

COORDINATION WITH STATE ECONOMIC DEVELOPMENT PRIORITIES

Projects and planning activities included in the CEDS complement state economic development priorities in both Nebraska and Iowa. While there are some distinctions between the specific goals in Nebraska and Iowa, both states seek an environment of competitiveness and prosperity for its residents and businesses.

The State of Nebraska lists the following priorities for community and economic development:

- Strengthen Nebraska communities through community development programs and services, which provide a stable platform for economic development.
- Foster the competitiveness of Nebraska's business and industrial sector- and as a result- assist in the economic development of Nebraska's communities and people.

The State of Iowa's 2010 Strategic Plan lists economic development priorities as follows:

- Increase the state's workforce population by 310,000 people
- Connect every community in Iowa with broadband high-speed Internet service

- Establish Iowa as the Life Sciences Capital of the World through reinvention of agriculture
- Create destination attractions that provide opportunities for recreation and entertainment
- Increase wages and worker income
- Enhance the growth and learning of Iowa's youngest residents

PLAN EVALUATION & PROGRAM MONITORING

The MAPA EDD Strategy Committee is responsible for monitoring and updating the CEDS, and will assume responsibility for regular evaluation of both the plan and the projects recommended. The CEDS will be reviewed and updated annually at a minimum, with more frequent updates if significant changes in the regional economy warrant further consideration. This annual monitoring and evaluation will determine progress made in addressing the goals and strategies outlined in the plan. Goals and strategies may also need to be revised to ensure they continue to meet the needs of the MAPA region. Every five years the plan will be fully revised to ensure accuracy of the information it contains. It is suggested that the Strategy Committee, or one similar, be convened to complete this task.

While the MAPA EDD Governing Board and Strategy Committee provide the best source of continuity in local leadership, as well as the necessary authority to ensure active implementation of planning initiatives and activities, significant input shall be obtained from interested citizens and neighboring jurisdictions. In conducting periodic evaluations of the CEDS, the Strategy Committee will first consider any material changes to data in the adopted document, such as the release of new demographic information. Once those tasks are completed, the Strategy Committee will evaluate its list of goals, strategies, and projects, making revisions to account for completed projects and outcomes achieved. The Strategy Committee will reevaluate projects that have not been implemented or bypassed entirely and determine if they should continue to be represented in the CEDS. To ensure continued public participation, notice of the annual review should be published in area newspapers and interested citizens will be allowed reasonable opportunity to review and provide comments.

SECTION VI

DISASTER & ECONOMIC RECOVERY & RESILIENCY STRATEGY

REGIONAL RECOVERY STRATEGY

The purpose of the Regional Recovery Strategy is to provide guidance to jurisdictions in the MAPA region when they face the challenges of long-term recovery from a disaster, both natural and man-made in nature. Individual jurisdictions should consider the appropriateness of suggested strategies to both the geographic location and nature of the disaster. Due to the uniqueness of individual communities and disaster types, the strategy should be considered a template and not a finite document.

The Regional Recovery Strategy is organized into four stages, beginning with the initial response through long-term recovery. The strategy contains four recovery components: *Coordination*, *Housing*, *Infrastructure*, and *Business*. Not every stage will include all recovery components. Each component provides recovery goals, sample strategies, and suggested responsible agencies. Goals may be regional or local depending on responsible parties.

STAGE I – IMMEDIATE ACTION & COORDINATION

Coordination

Goal: Communicate progress regularly.

Strategy: Establish a public information officer to serve as the single point of contact and to communicate disaster-related information to the public.

Responsible Parties: City Council and/or County Board

Housing

Goal: Determine housing alternatives for displaced residents.

Strategy: Create an inventory of hotels and motels, apartments, and lease properties.

Responsible Parties: Convention and visitors bureaus; local community organizations

Infrastructure

Goal: Ensure public safety by securing infrastructure.

Strategy: Repair or mitigate damage to affected transportation and utility infrastructure.

Responsible Parties: City and/or County; NE/IA Department of Natural Resources; NE/IA Department of Transportation; NE/IA departments of economic development

STAGE II – SHORT-TERM RECOVERY

Coordination

Goal: Encourage a coordinated, community-wide recovery strategy.

Strategy: Establish a recovery committee to provide overall guidance and coordination to recovery efforts.

Responsible Parties: City Council and/or County Board

Goal: Ensure efficient use and maximization of available resources.

Strategy: Develop a comprehensive recovery financing plan that identifies potential funding sources.

Responsible Parties: Local recovery committee; MAPA

Strategy: Maximize coordination with nonprofit and faith-based organizations.

Responsible Parties: City Council and/or County Board; local recovery committee

Housing

Goal: Ensure adequate housing alternatives for displaced residents.

Strategy: Secure temporary, portable housing.

Responsible Parties: City and/or County; FEMA

Goal: Stabilize existing housing stock.

Strategy: Provide assistance to homeowners and landlords for repair of residential units damaged in a disaster.

Responsible Parties: FEMA; HUD

Business

Goal: Assess extent and severity of disaster impacts to businesses.

Strategy: Develop a standardized reporting mechanism to distribute to disaster affected businesses.

Responsible Parties: City and/or County; local chambers of commerce; MAPA

STAGE III – BUSINESS RECOVERY & REVITALIZATION

Business

Goal: Ensure the availability of resources and support services for affected, existing businesses.

Strategy: Capitalize Revolving Loan Fund for business assistance.

Responsible Parties: City and/or County; MAPA; local financial institutions; local chambers of commerce; EDA

STAGE IV – LONG-TERM RECOVERY

Coordination

Goal: Encourage multi-jurisdictional planning, recovery, and mitigation.

Strategy: Utilize multi-jurisdictional planning that addresses development in and around the disaster area.

Responsible Parties: City and/or County; MAPA; FEMA

Housing

Goal: Encourage replacement and new housing development.

Strategy: Establish new housing construction programs, both single-family and multi-family.

Responsible Parties: City and/or County; NE/IA finance authorities; local housing trust funds; local financial institutions

Goal: Foster housing recovery that is sustainable, inclusive, and meets the unique characteristics of the jurisdiction.

Strategy: Encourage green building in construction/reconstruction and smart growth development in land use practices.

Responsible Parties: Land use administrators and development officials; NE/IA finance authorities

Infrastructure

Goal: Encourage recovery that is sustainable and disaster resilient.

Strategy: Rebuild damaged infrastructure to more resilient standards and according to methods that minimize or eliminate adverse impacts.

Responsible Parties: City and/or County; NE/IA Department of Natural Resources; FEMA

Strategy: Consider relocation of critical assets to less hazard-prone areas.
Responsible Parties: City and/or County; local utilities; NE/IA Department of Natural Resources; FEMA

Strategy: Protect natural areas inside the floodplain from future development.
Responsible Parties: City and/or County; NE/IA Department of Natural Resources

Business

Goal: Encourage businesses to adopt disaster planning principals.

Strategy: Reach out to businesses to explain benefits of disaster and continuity planning.

Responsible Parties: Local chambers of commerce; MAPA

Important Information for Individuals & Businesses

While the above recovery strategy is constructed with municipalities and counties in mind, individual residents and businesses usually require additional information and resources. Information on such services is usually provided by local media and contained in the recovery documents and publications of the various public and private agencies. To assist jurisdictions acquire such services, this section provides basic information and appropriate contacts for individuals and businesses.

Following a disaster, individuals and businesses should ensure their immediate health and safety. Any damages to property that are life threatening, harmful, or may become harmful, need to be removed and made safe. Individuals and businesses should file a claim with their insurance company as soon as possible. As long as it is safe to do so, residents are strongly encouraged to take pictures to document personal property damage, including, but not limited to: structural damage to property, damage to appliances, damage to personal belongings, damage to vehicles, and damage to utilities. Furthermore, while the list of eligible and ineligible recovery expenses may change over time, receipts will almost always be required to obtain reimbursement for such expenses.

Individuals and businesses should stay apprised of local newspaper, radio, and television news stations for disaster recovery-related information. Individuals can always contact their local county emergency management office for relevant information and assistance options.

Local Emergency Management Agency Contacts:

Douglas County, (402) 444-5040, <http://www.co.douglas.ne.us/county/dcema/>

Sarpy County, (402) 593-5785, <http://www.sarpy.com/ema/>

Washington County, (402) 727-2785, <http://www.region5-6.org/default.asp>

Mills County, (712) 527-3643, <http://www.millscoia.us/Offices/ems/index.htm>

Pottawattamie County, (712) 328-5777, <http://www.pottcounty.com/departments/emergency-management/overview/>

Disaster Declarations & FEMA

After a disaster, the Governor will make a proclamation regarding whether affected counties are eligible for any State Individual Assistance Programs. Once the Governor has proclaimed a disaster in a county, the county emergency management office will begin collecting damage figures from individuals and businesses to forward to FEMA. FEMA will then make a determination on whether the damage sustained warrants a Presidential Disaster Declaration. If

a county has been determined eligible for Individual Assistance, citizens may then go through the process of applying for funds.

The following is a general list of the requirements to be eligible for disaster assistance programs:

- FEMA award letter
- Copy of driver's license or other legal form of identification
- Documentation of any monetary award received or claim that has been denied
- Cost estimates for proposed necessary and reasonable repairs
- Receipts and other documentation of out-of-pocket expenses

To apply for FEMA individual or public assistance programs, call (800) 621-3362 from 7 a.m. until 10 p.m., or (800) 462-7585 for those with hearing or speech impairments, or apply online at www.disasterassistance.gov.

Business Programs through the SBA

Businesses with unmet needs are encouraged to register for the United States Small Business Association (SBA) loan program. SBA's disaster loans are the primary form of federal assistance for the recovery of non-farm, private sector disaster losses. Financial assistance is generally available in the form of low-interest, long-term loans.

To apply for the U.S. Small Business Administration contact:

SBA Answer Desk: 1-800-U-ASK-SBA (1-800-827-5722)

Send emails to: answerdesk@sba.gov

Mail to: 409 3rd Street SW, Washington, DC 20416

www.sba.gov/services/disasterassistance

(END OF DOCUMENT)