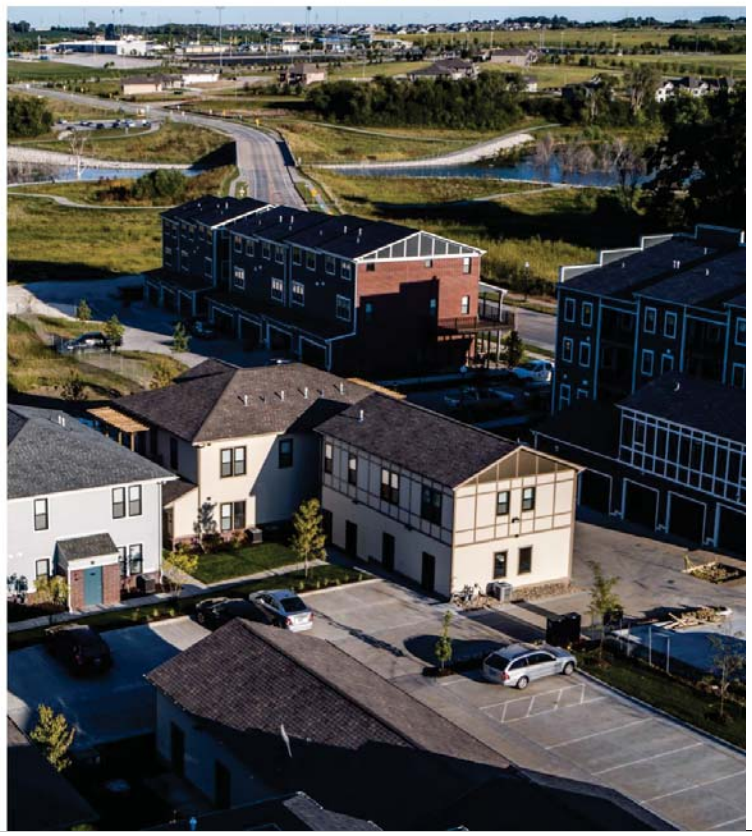
MAPA Regional Development Report

Regional Development Report

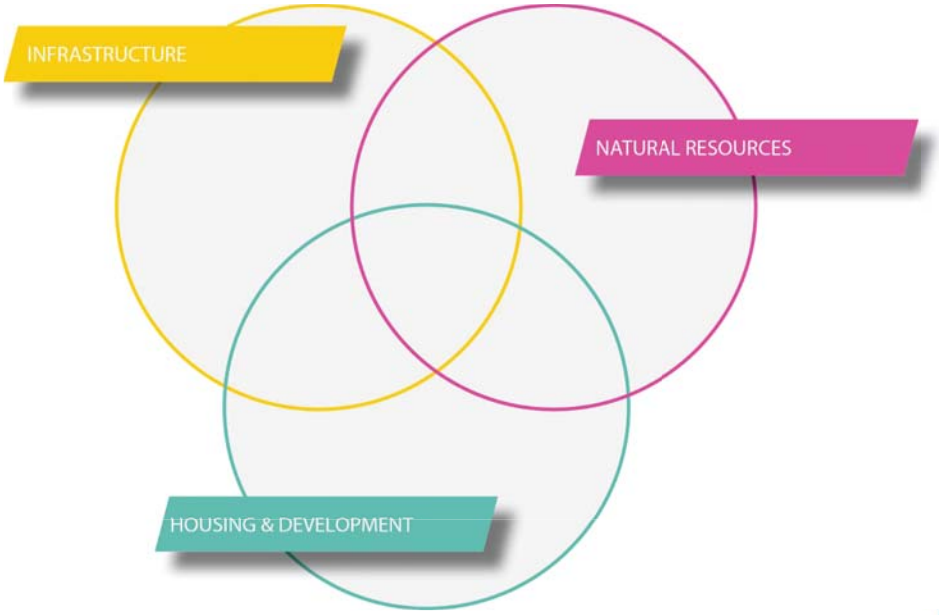
2010 - 2019

July 21, 2020



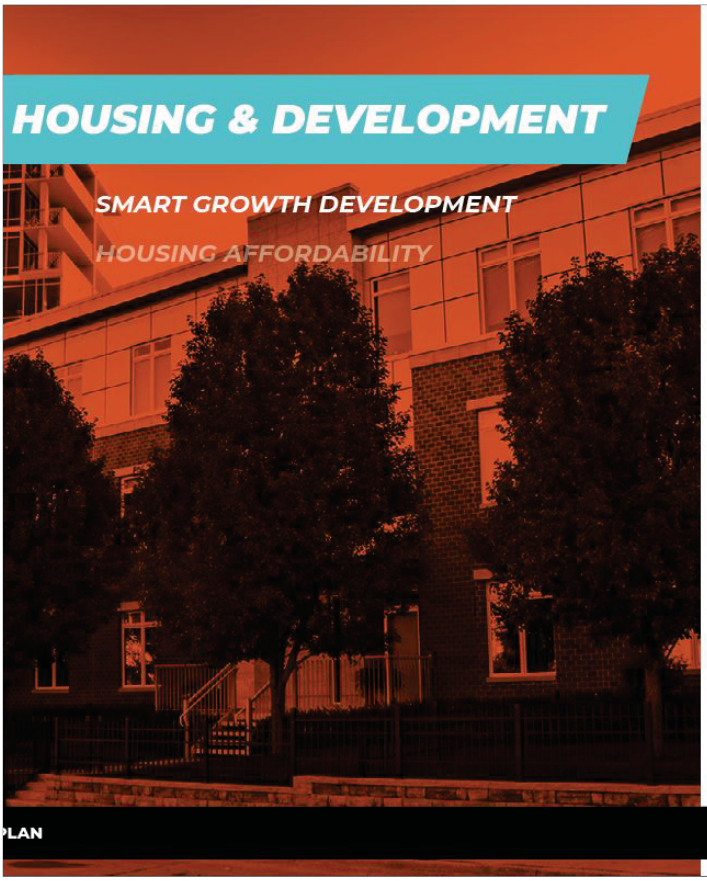
Background

- MAPA developed Heartland 2050 as part of The Sustainable Communities Regional Planning (SCRP) Grant Program
- Heartland 2050 Vision included key action steps to set up tools for monitoring growth
- Several years of work developing the data and tools to analysis land use changes
- Received lots of feedback about the importance of telling the story about costs



- The outline of the report follows the three areas of the Heartland 2050 Action Plan
- Key elements of the action plan follow the presentation of the data

Connect. Plan. Thrive.



SMART GROWTH DEVELOPMENT

ACTION

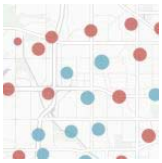
NEAR RANGE	MID RANGE	LONG RANGE
Map areas with infill opportunities in urban, suburban, and small communities Convene planners roundtable to assess regionally significant opportunities for smart growth	Conduct a code audit of local communities to identify regulatory barriers to infill development Research model ordinances and code Coordinate with local planning staff and civic organizations to develop a community engagement and education plan	Push for local adoption of zoning and building codes with greater flexibility for infill development (through MAPA Council of Officials)

PLAN

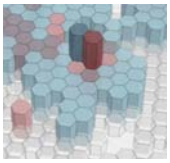
Heartland 2050

Story Map

- An ArcGIS Online Story Map was used to present the data
- Building on other regional demographic analysis the report links together key land use datasets:



Permit Data



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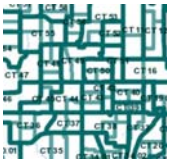


Census Data

Transportation

Natural Resources

HOUSING & DEVELOPMENT

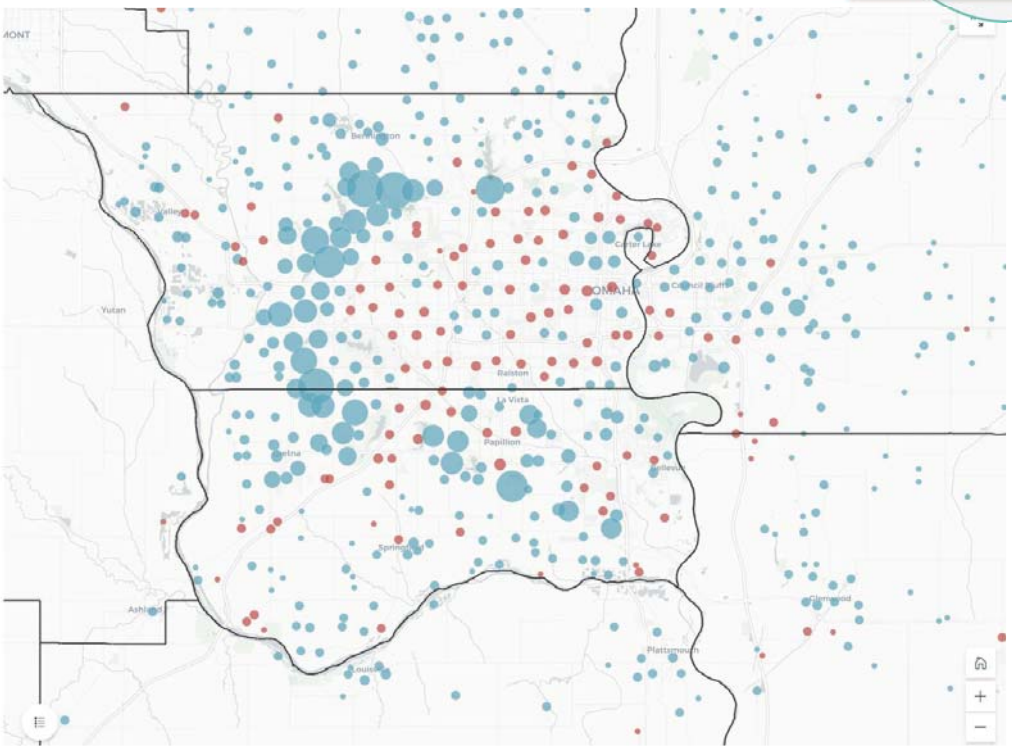
Permit Activity 2010 - 2019

Local governments approve permits for many activities, including the construction of new houses or businesses. Tracking these permits lets us understand changes to development over time throughout the region.

In partnership with the Greater Omaha Chamber of Commerce, MAPA locates permit activity throughout the region. Permits are provided by a number of jurisdictions in varying formats and classifications. As part of the locating process MAPA generalizes the classification to provide a regional view of the data.

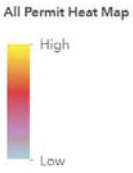
Monthly permit summaries by county are available from the Omaha Chamber here:

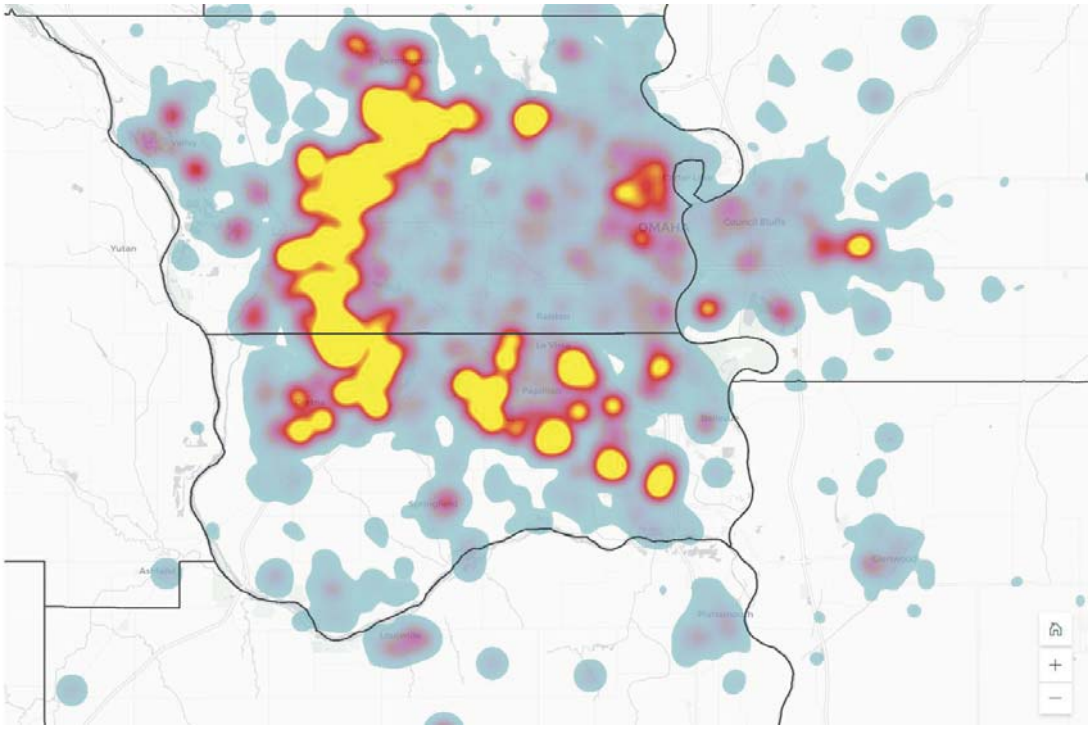
https://www.omahachamber.org/economic-development/regional-data/



Activity Heat Map

Permit activity can also be rendered as a heat map. Higher concentrations of permits appear brighter in this view to show where the most activity is occurring.





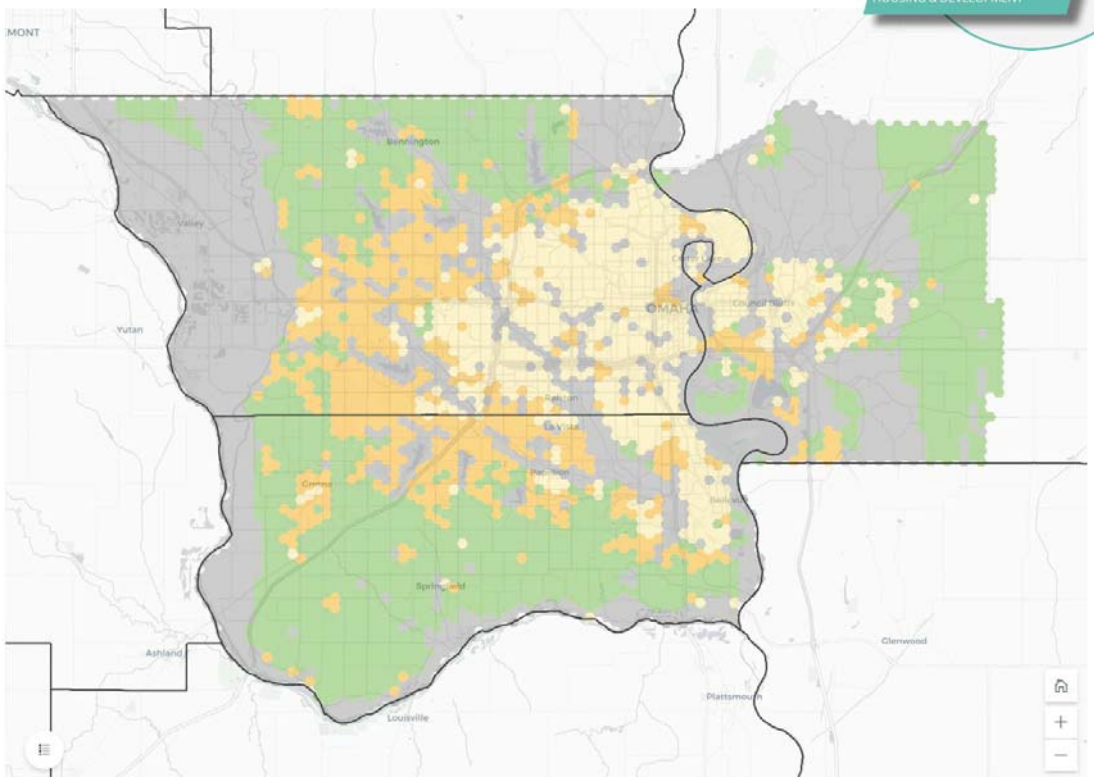
HOUSING & DEVELOPMENT

Land Consumption

While tracking development over time provides an overview of activity, understanding the total amount of land consumed by this development is very important. Using parcel data, we classified the available land area and calculated how it developed over time.

As of 2019, the total land consumed by these uses is summarized below:

- **Developed Area** - 112,988 acres
- **Constrained Area** - 174,328 acres
- **Greenfield Area** - 146,094 acres



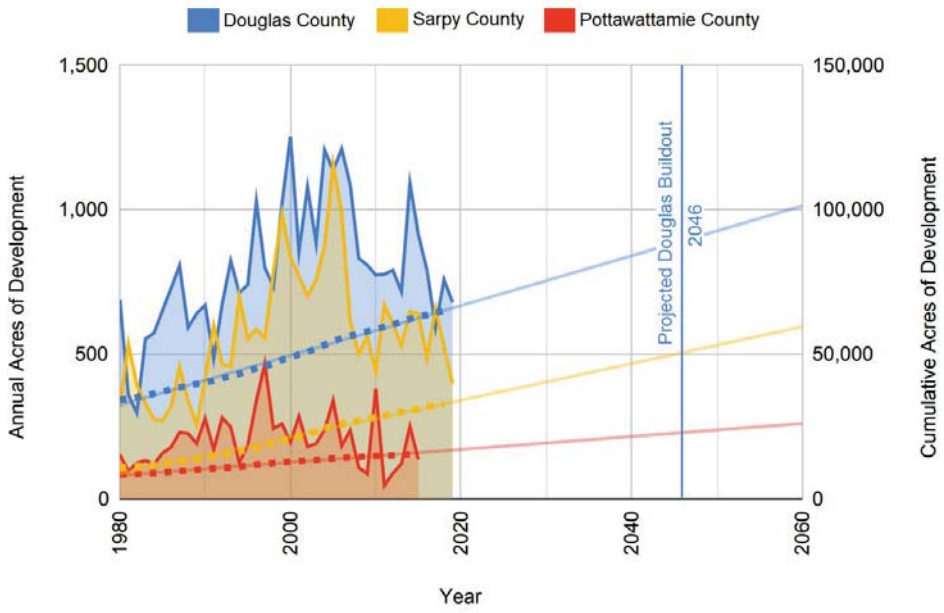
Projected Growth

Since 1980 development has fluctuated at the county level. The annual acres of development shown on the left side of the chart follow many past national economic trends, most notably the housing crisis in 2008. Annual development activity has not yet returned to the levels seen prior to this recession.

In spite of these fluctuations, cumulative development (shown on the right side of the chart) has seen a steady increase over time. Projecting this development outward and applying the linear trend to Greenfield Areas in the region we can forecast when the available land will be consumed.

If we only developed remaining greenfield areas, Douglas County would be built out fully by 2046. Sarpy County, the fastest developing county in the region, would reach build out by 2078.

Our analysis looked only at the portion of Pottawattamie County within MAPAs Transportation Management Area. The projection for this portion is 2149 but it is likely that other parts of the county would attract some of that development prior to reaching full build out.



HOUSING & DEVELOPMENT

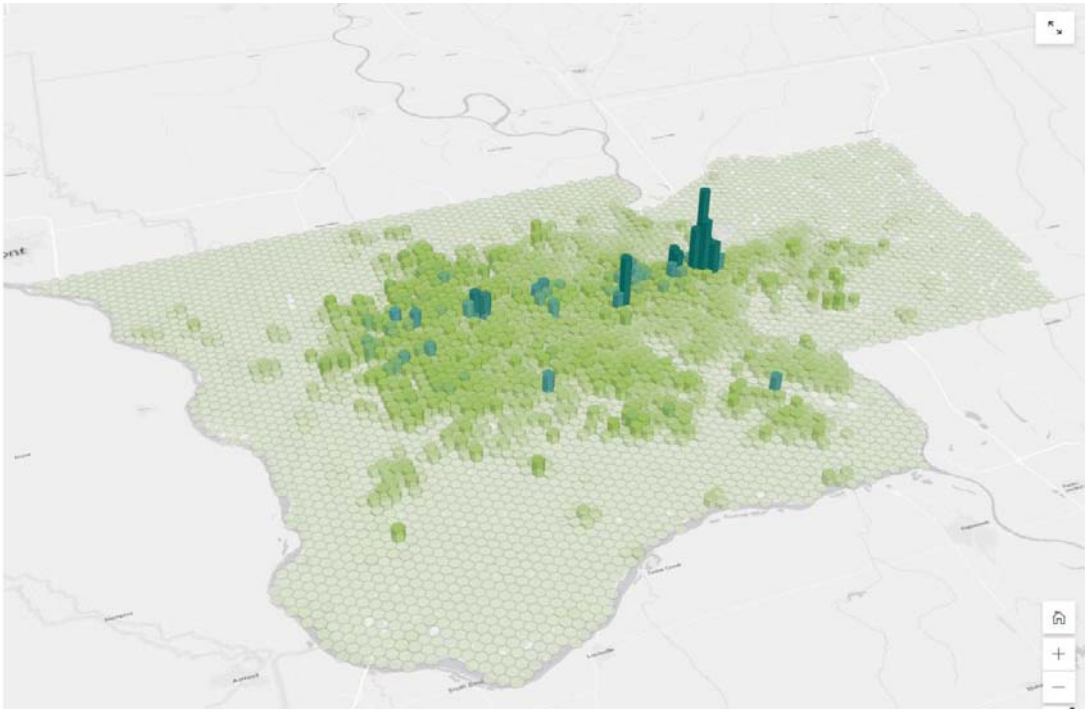
Value of Development

One important function of development is its impact on the tax base of communities. Local governments maintain records of each parcel's "assessed value" to levy property taxes that support important local services.

As new areas are developed, new services and infrastructure often need to be provided. The value of development influences the fiscal impact of land use on local governments.

The taxable value of a location divided by the amount of land it consumes in acres is its **taxable value per acre**. This measures its value relative to locations with differing development patterns.

This analysis has been conducted by many regions, including similar work done for the Des Moines area (see Greater Des Moines: Mapping the Dollars and Sense of Land Use — January 2016.)



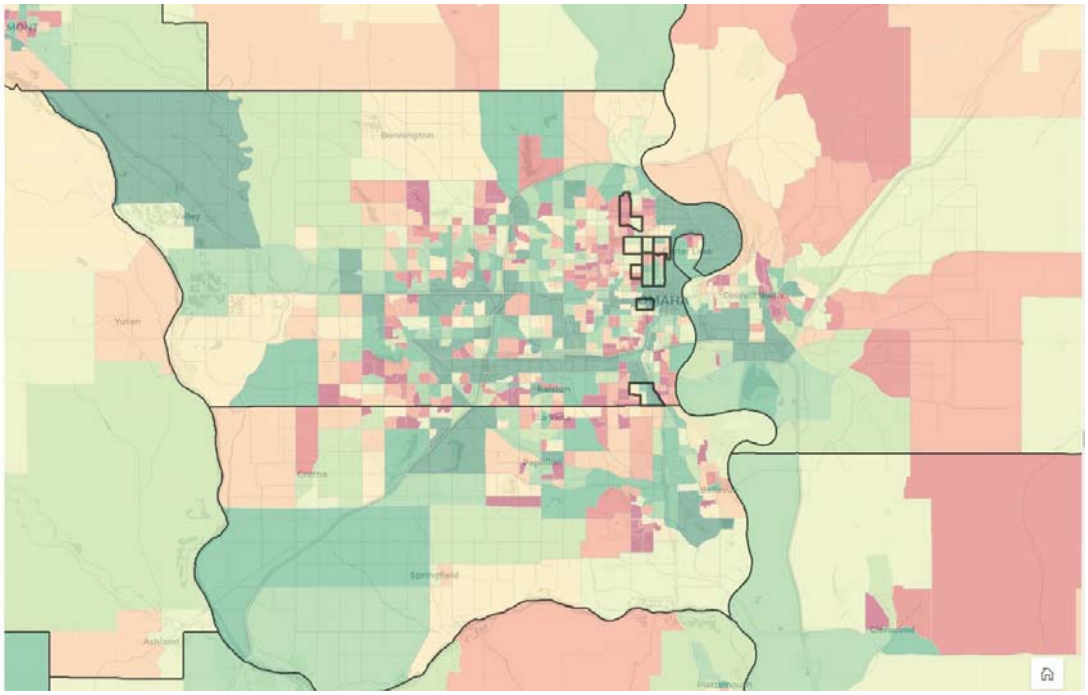
Regional Accessibility

Our transportation system exists to connect people to the destinations that matter in their lives. Accessibility is a measurement of how easy it is for people to reach those destinations in a certain amount of time.

We rely on accessibility to measure how effectively our land use decisions and transportation investments connect people to these important opportunities (like jobs).

This map shows the Department of Housing and Urban Development (HUD) Jobs Proximity Index. Values are percentile ranked with values ranging from 0 to 100. The higher the index value, the better the access to employment opportunities for residents in a neighborhood.

Racially or Ethnically Concentrated Areas of Poverty (R/ECAPs)



INFRASTRUCTURE

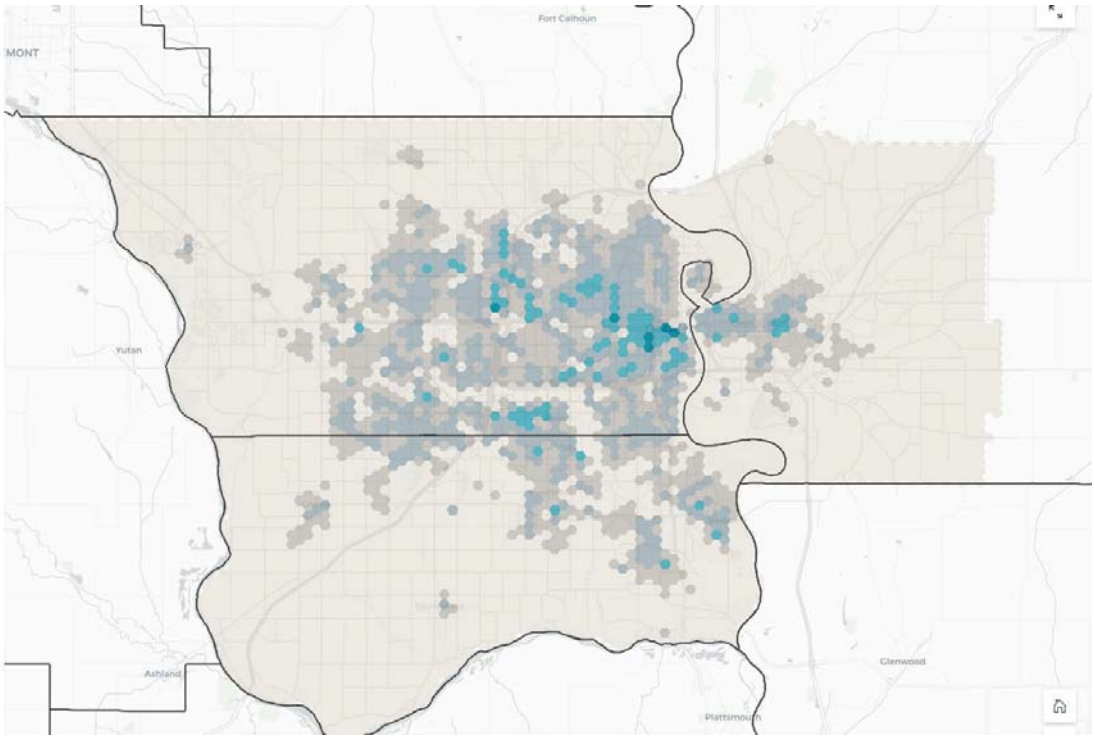
Regional Infrastructure Cost

We have observed a relationship between the amount of infrastructure provided to neighborhoods throughout our region and the amount of people served by those investments.

The density of development determines how many people are served by the streets, sewers, and other elements of infrastructure needed to support businesses and homes. These decisions about how our communities develop are crucial to ensure we can provide and maintain this infrastructure efficiently into the future.

This map shows existing residential development density from low to high. The darker areas indicate higher levels of density.

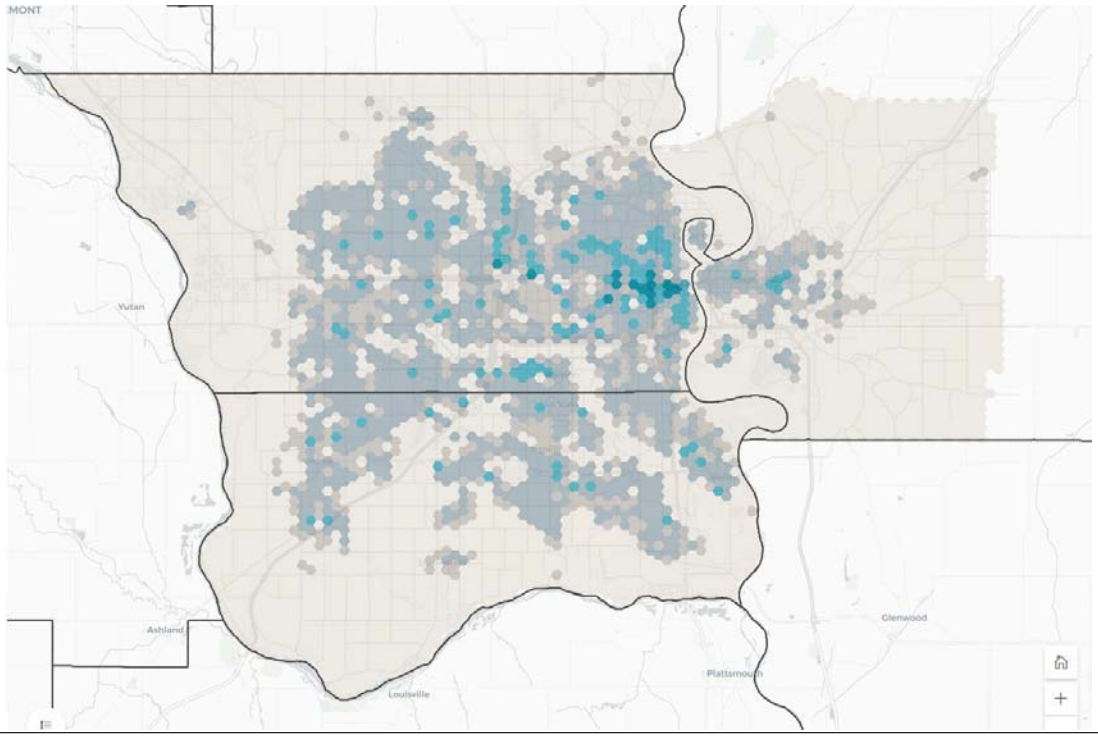
Housing Unit Density
- High Density
- Medium Density
- Low Density
- Very Low Density
- Marginal Development



Future Growth

This map shows our anticipated future residential land use that was developed for the Heartland 2050 vision. In this scenario, the footprint of our region's development grows overall. However, the development that does occur is more compact than the sprawling, trend scenario and communities in the region take advantage of many redevelopment and infill opportunities.

MAPA has developed multiple future land use scenarios for the region that range from sprawling to dense conditions.



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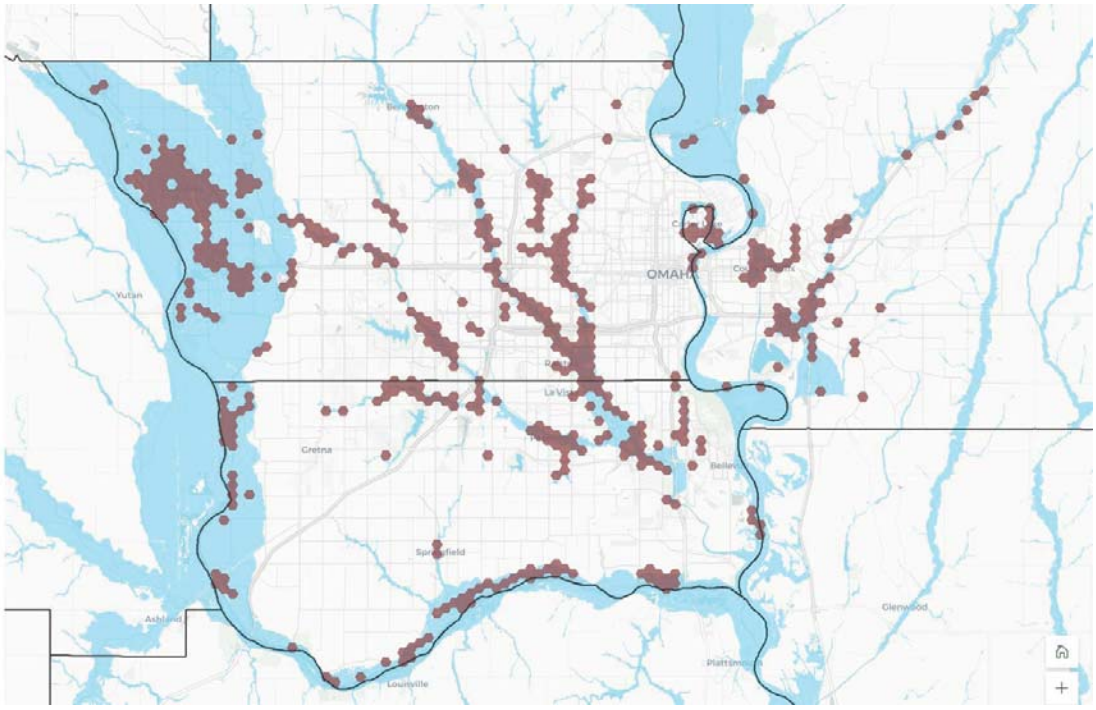
Value of Areas at Risk

This map includes grids with commercial and residential parcels that are within flood areas. The 1% annual chance flood areas are based on elevation modeling and the presence of flood control structures but only estimate the location of areas that could be impacted.

Within the metro area we estimate that approximately $3.3 billion in property value is at risk of flooding.



Developed Flood Areas

NFHL
NHLD Raster
1% Annual Chance

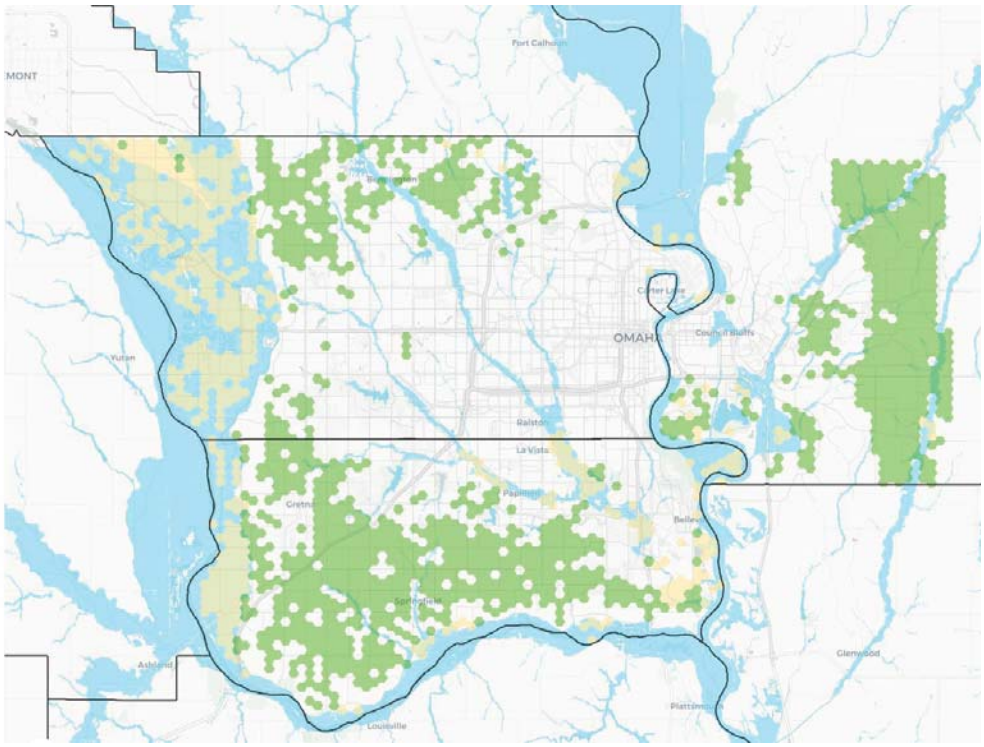
NATURAL RESOURCES

Prime Farmland

The USDA classifies land by soil type through their Natural Resource Conservation Service (NRCS). Using soil composition, slope, and the presence of flooding they rate agricultural acres across the country to identify areas that are highly suitable for farming. These areas are referred to as Prime Farmland.

Much of the metro area once represented some of the most suitable farmland in the country. These conditions still exist in greenfield areas and when drained, in flood prone areas. In developable areas prime farmland conditions exist in:

- 49% of Douglas County greenfield acres
- 65% of Sarpy County greenfield acres
- 82% of Pottawattamie County greenfield acres



Prime Farmland
Prime Farmland
Prime If Drained

NFHL
NHLD Raster
1% Annual Chance

Next Steps

- Released to public in 2020 at:

  http://development.mapacog.org/
- Currently updating with 2020 data
- Adding an Affordable Housing analysis
- Expanding Equity analysis

Questions?