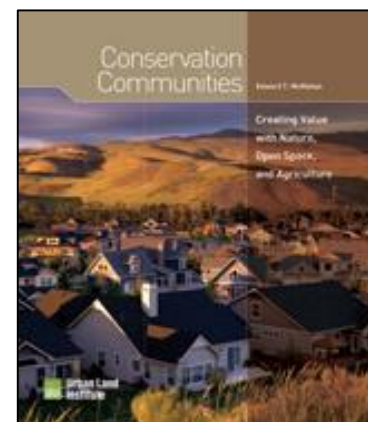


An Advisory Services Panel for Omaha, NE and Council Bluffs, IA



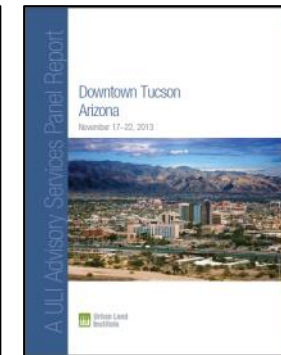
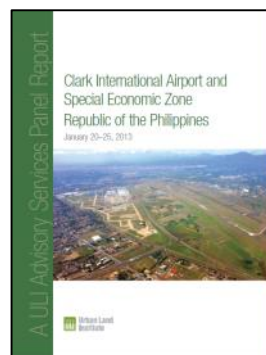
About the Urban Land Institute

- The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.
- ULI is a membership organization with nearly 32,000 members, worldwide representing the spectrum of real estate development, land use planning and financial disciplines, working in private enterprise and public service.
- What the Urban Land Institute does:
 - Conducts Research
 - Provides a forum for sharing of best practices
 - Writes, edits and publishes books and magazines
 - Organizes and conducts meetings
 - Directs outreach programs
 - Conducts Advisory Services Panels



The Advisory Services Program

- Since 1947
- 15 - 20 panels a year on a variety of land use subjects
- Provides independent, objective candid advice on important land use and real estate issues
- Process
 - Review background materials
 - Receive a sponsor presentation & tour
 - Conduct stakeholder interviews
 - Consider data, frame issues and write recommendations
 - Make presentation
 - Produce a final report



The Panel

- **Jim Cloar**
Downtown Advisory Services
Tampa, FL
- **Kevin Farrell**
Kevin Farrell Associates
Saint Louis, MO
- **Bob Lewis**
Development Strategies
Saint Louis, MO
- **Donna Lewis**
City of Mercer County
Trenton, NJ
- **Jan Minami**
AMI Concepts
Reedley, CA
- **Alan Mountjoy**
NBBJ
Boston, MA
- **Jeff Sanford**
Jeff Sanford Consulting
Memphis, TN
- **Marcia Tobin**
AECOM
Knoxville, TN



Thanks to the following sponsors:

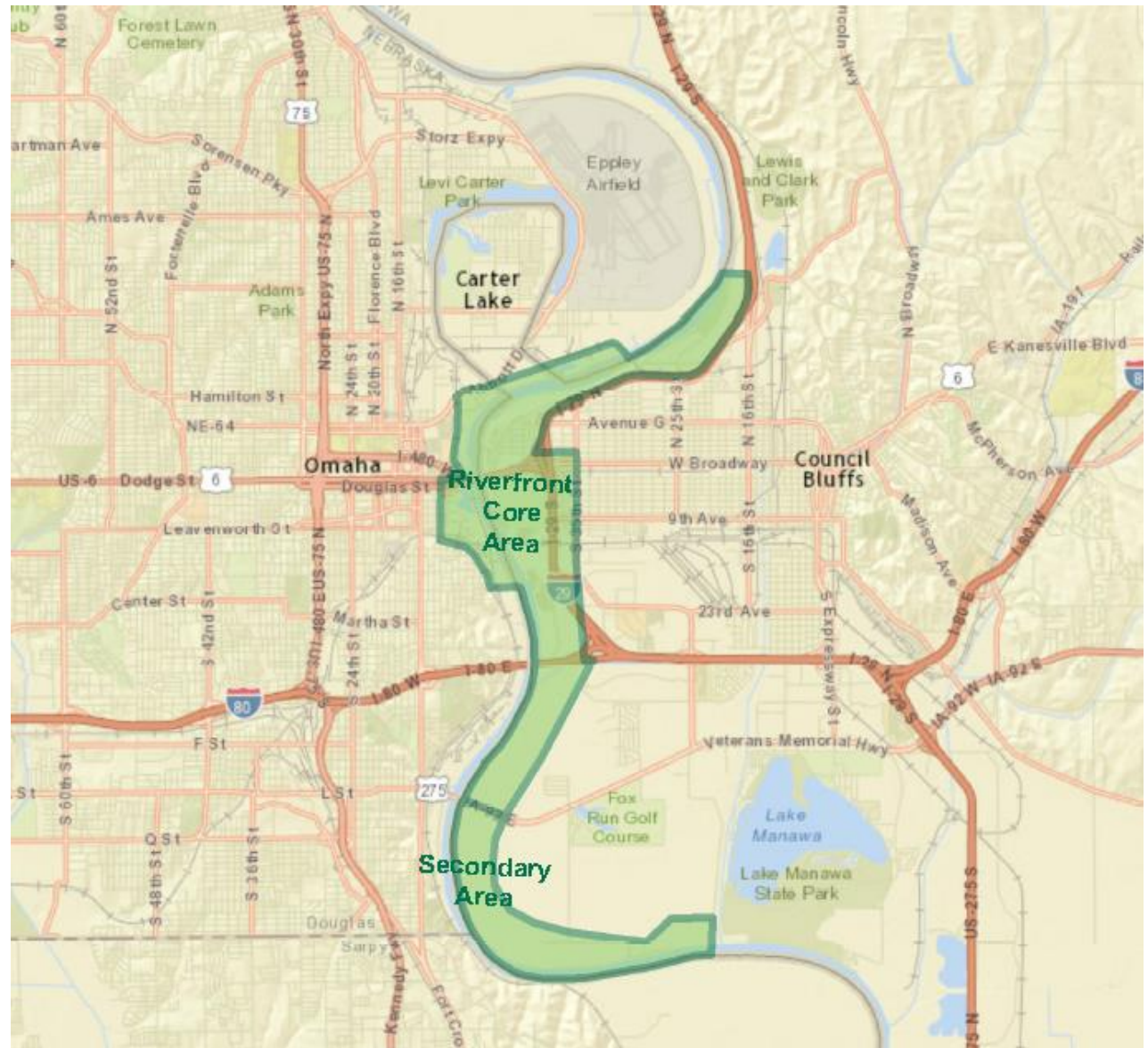
- City of Omaha
- City of Council Bluffs
- Greater Omaha Chamber of Commerce
- Omaha Convention and Visitors Bureau
- BNSF Railway
- ConAgra Foods
- Husch Blackwell
- Gallup
- Heistand Family Foundation
- Allen & Company
- MECA
- The Sherwood Foundation
- Back to the River
- Council Bluffs Chamber of Commerce
- Iowa West Foundation

Thank you to our stakeholder interviewees...

Brian Akert, Omaha Multisports Complex | David Arnold, StraightShot | Holly Barrett, Downtown Improvement District | Denise Bartels, Omaha Multisports Complex | Brook Bench, City of Omaha | Doug Bisson, HDR Engineering, Inc. | Mary Ann Borgeson, Douglas County Commission | Sara Boyd, Omaha Community Foundation | Michael Brannan, M/M Development | David Brown, Greater Omaha Chamber | Rose Brown, City of Council Bluffs | Tim Burke, OPPD | Steve Coufal, Eppley Airfield | Spencer Crews, Lauritzen Gardens | Nina Cudahy, City of Omaha | Hal Daub, HuschBlackwell | Lynn Dittmer, MAPA | Roger Dixon, MECA | Gregg Dress, Golf Central | Doug Drummey, CB Water Works Dept. | Pete Festersen, City of Omaha City Council | Bob Freeman, Fraser Stryker | Kristin Gochenour, Greater Omaha Chamber | Don Gross, City of Council Bluffs | Vic Gutman, VGA Group | Julie Harris, LiveWell Omaha | Todd Heistand, NuStyle Development | Trish Hoffman, Omaha Multisports Complex | Tim Holland, Omaha Multisports Complex | Mark Hughes | Rachel Jacobson, FilmStreams | Steve Jensen, City of Omaha | Troy Jerman, IA Dept. of Transportation | Chris Kircher, ConAgra | Murthy Koti, City of Omaha | Jim Krieger, Gallup | Rick Kubat, MUD | Lou Lamberty | Brian Leaders, National Park Services | Jasmyn LeFlore, Omaha Convention & Visitors Bureau | Brian Littler, Focal Realty | Gary Loop | John Lund, The Lund Company | Gayle Malmquist, The River, Inc. | Mike Mancuso, Mid-America Expo | Dana Markel, Omaha Convention & Visitors Bureau | Tom Markel, Storz Brewing | Ryan McClure, City of Omaha | Mike McMeekin, Lamp Rynearson | Derek Miller, City of Omaha | Ed Miller, Gallup | Jed Moulton, City of Omaha | Bob Mundt, CB Area Chamber of Commerce | Jay Noodle, Noddle Companies | Todd Pfitzer, City of Omaha | Ron Quinn, Tenaska | Greg Reeder, CB Public Works Dept. | Chris Rodgers, Douglas County Commission | Susannah Ross, Sasaki | Dave Roth, Eppley Airfield | Tim Schmitt, Eppley Airfield | Wendy Schultz, Chief of Staff, Council Bluffs | Cassie Seagren, City of Omaha | Donn Seidholz, NetJets | Kim Shafer, National Park Services | Pat Slaven, City of Omaha | Clint Sloss, MAPA | Connie Spellman, Omaha by Design | Mayor Jean Stothert | Kenley Sturdivant-Wilson, Kaneko | James Thele, City of Omaha | Randy Thelen, Greater Omaha Chamber | Pete Tulipana, Iowa West Foundation | Ben Turner, Heartland B-Cycle | Mayor Matt Walsh | Mayor Gerald Waltrip | Deborah Ward, Omaha Convention & Visitors Bureau | Tim Weander, Nebraska Dept. of Roads | Chad Weaver, City of Omaha | Sharon White, CB City Council | Randy Wilson | Greg Youell, MAPA | Jenny Zimmer, North Downtown Omaha Alliance

And everyone else

The Study Area



Principal Assignment

To realize the vision for the riverfront, the panel should address the following tasks and questions while thinking about short, medium, and long term practical applications:

- 1. Develop a concept that encourages the activation of the riverfront through coordination and implementation efforts with a regional focus (between 2 distinct cities, counties, and states.)**
- 2. Identify potential opportunities or barriers that promote or prevent activity from occurring along the riverfront.**
- 3. Determine potential events, projects, or development opportunities that would overcome obstacles and improve opportunities for activities and accessibility along the riverfront.**

'A River That Binds It'

- **Activate the riverfront**
- **Local awareness of mutual destiny**

Omaha

Council
Bluffs

Vision

- **An active, vital riverfront will be**
 - **Center of gravity**
 - **Connector**
 - **Community celebration**
 - **Economic development driver**
 - **Source of regional pride**



Presentation Outline

- Study Area and the assignment (Jim Cloar)
- Leveraging the Market (Bob Lewis)
- Core Principles (Kevin Farrell)
- Links to Opportunities (Marcia Tobin)
- Recommendations
 - Events (Jeff Sanford)
 - Experiencing the riverfront (Jan Minami)
 - Placemaking (Alan Mountjoy)
- Getting Started (Donna Lewis)
- Summary

Leveraging the Market to Activate the Riverfront

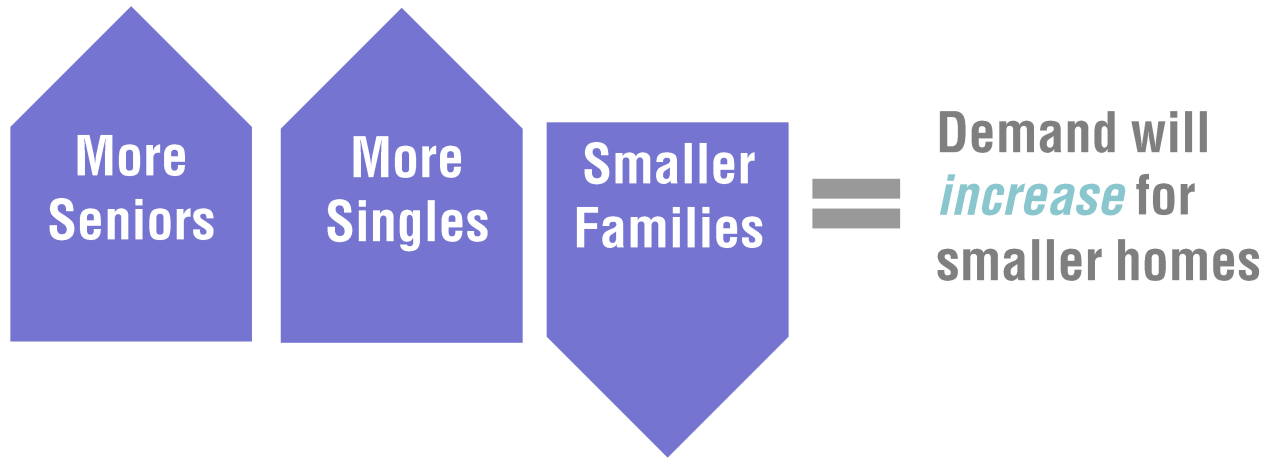
- 24/7 **RESIDENTS**: LIVING IN URBAN SETTINGS
 - Large, untapped market of “urban prospects”
 - In the metro area today and growth projections
 - Preference for urban settings (live, work, learn, play)
- 10/5 **EMPLOYEES**: WORKING IN URBAN SETTINGS
 - Employment growth favoring “urban prospects”
 - Think Millennials, Think creative class, Think experienced Boomers
 - A lot of them, increasingly well-educated, less auto-oriented
- 18/7 **VISITORS AND PATRONS**: PLAYING, SHOPPING, EATING, WORKING
 - Great potential for increasing riverfront demand
 - Hotel capacity to support more events
 - Better organized, more accessible attractions and activities

Market Overview: Metro Economic Rankings

- **60th most populated** metro in the USA (of 381)
 - 16 is Minneapolis
 - 19 is St. Louis
 - 21 is Denver
 - 30 is Kansas City
 - 59 is Albuquerque
 - 61 is Albany, NY
 - 84 is Wichita
 - 91 is Des Moines
- **Five *Fortune 500* Headquarters** – double the per capita “fair share”
- **47th highest per capita income**
- **37th highest per capita GMP** (gross metropolitan product)

National Demographic Shifts

Demographics are Changing



Households without children

1960	2025
52%	72%

Americans Turning 65 Each Year

1.5M	4.3M
2000	2025

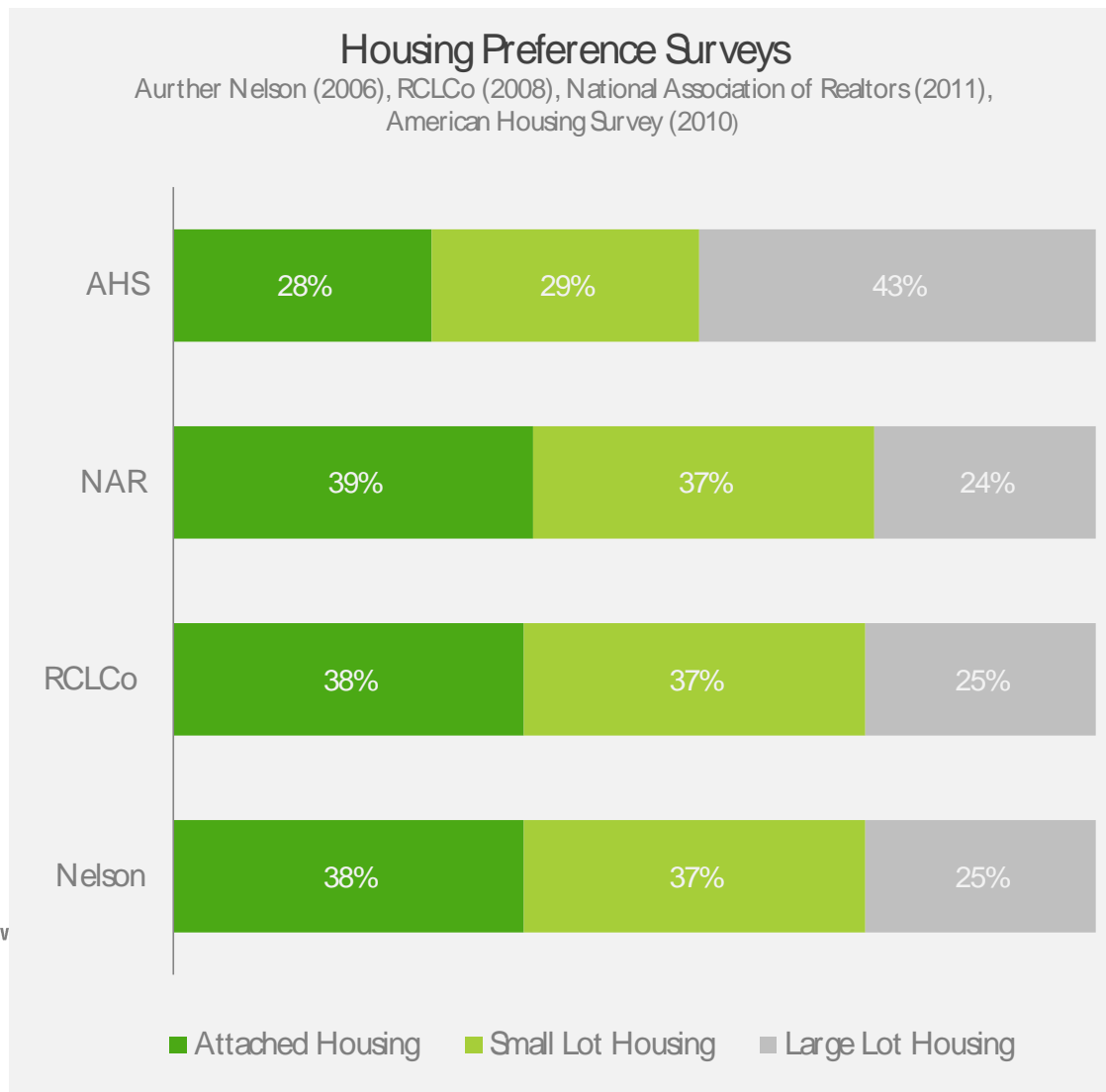
Source: Census for 1960 and 2000, 2025 adapted from Martha Farnsworth Riche, How Changes in the Nation's Age and Household Structure Will Reshape Housing Demand in the 21st Century, HUD (2003).

National Housing Preferences Shift

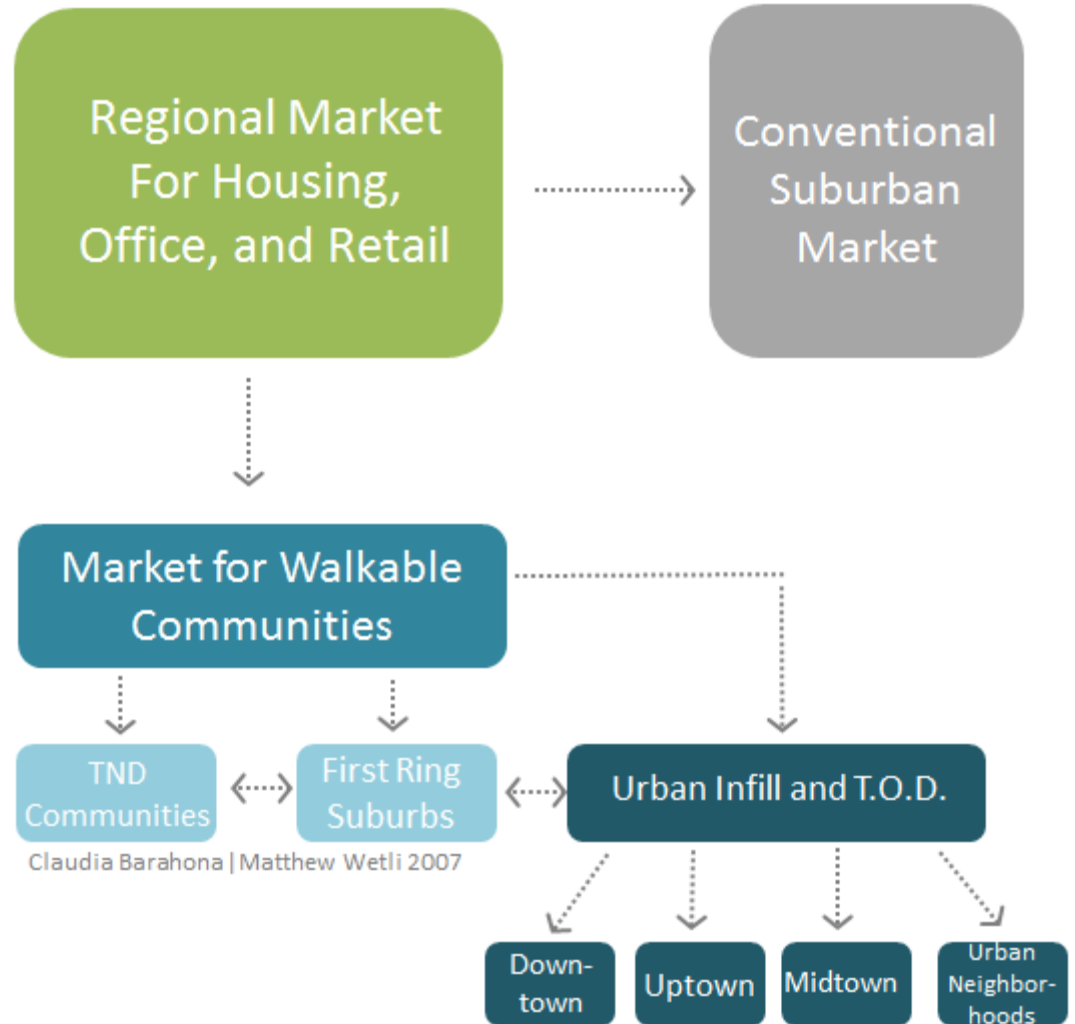
Housing Preferences are Changing:

- More Segmented
- Greater Mix of Uses*
- One-third of suburbanites would prefer to live somewhere walkable**
- 80 million Millennials: 88% want to be in an urban setting***

* National Association of Realtors: The 2011 Community Preference Survey
 ** SMARTRAQ 2007
 *** No McMansions for Millennials, WSI, January 13, 2011



Combining the Shifts: Segmented Demand



Claudia Barahona | Matthew Wetli 2007

Market Overview: Household Demographics

- **Who would live:**
 - Downtown?
 - Along the Urban River?
- **Urban “Prospects”**
 - Urban Professionals
 - Displaced Urbanites
 - College Students



Urban Professionals



Laptops & Lattes



Urban Chic



Metropolitans



Trendsetters



Metro Renters

Displaced Urbanites



Connoisseurs



In Style



**Prosperous
Empty Nesters**



Young & Restless

College Students



College Towns



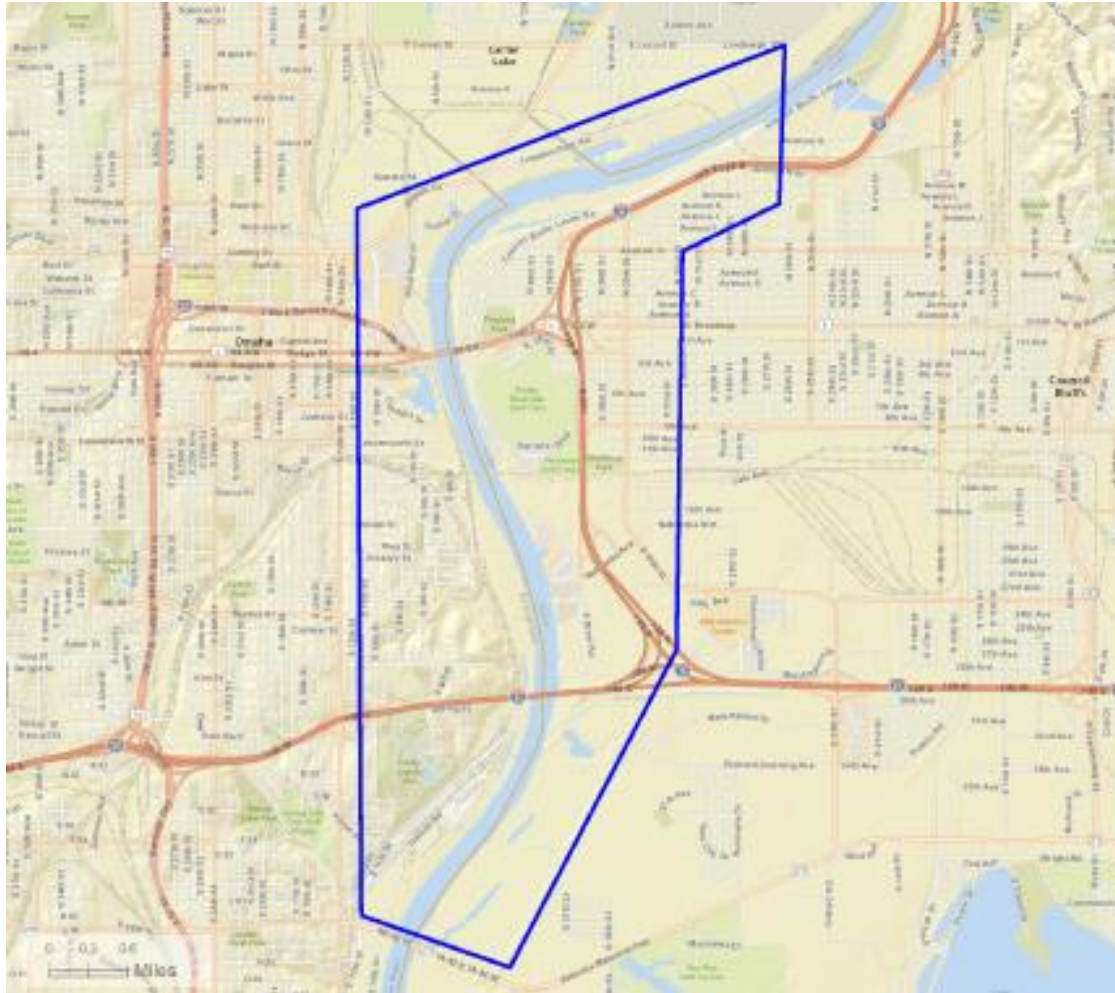
Dorms to Diplomas

**11 of 65 “Tapestry” demographic segments:
URBAN PROSPECTS**

Urban Prospect Households: Broad Characteristics

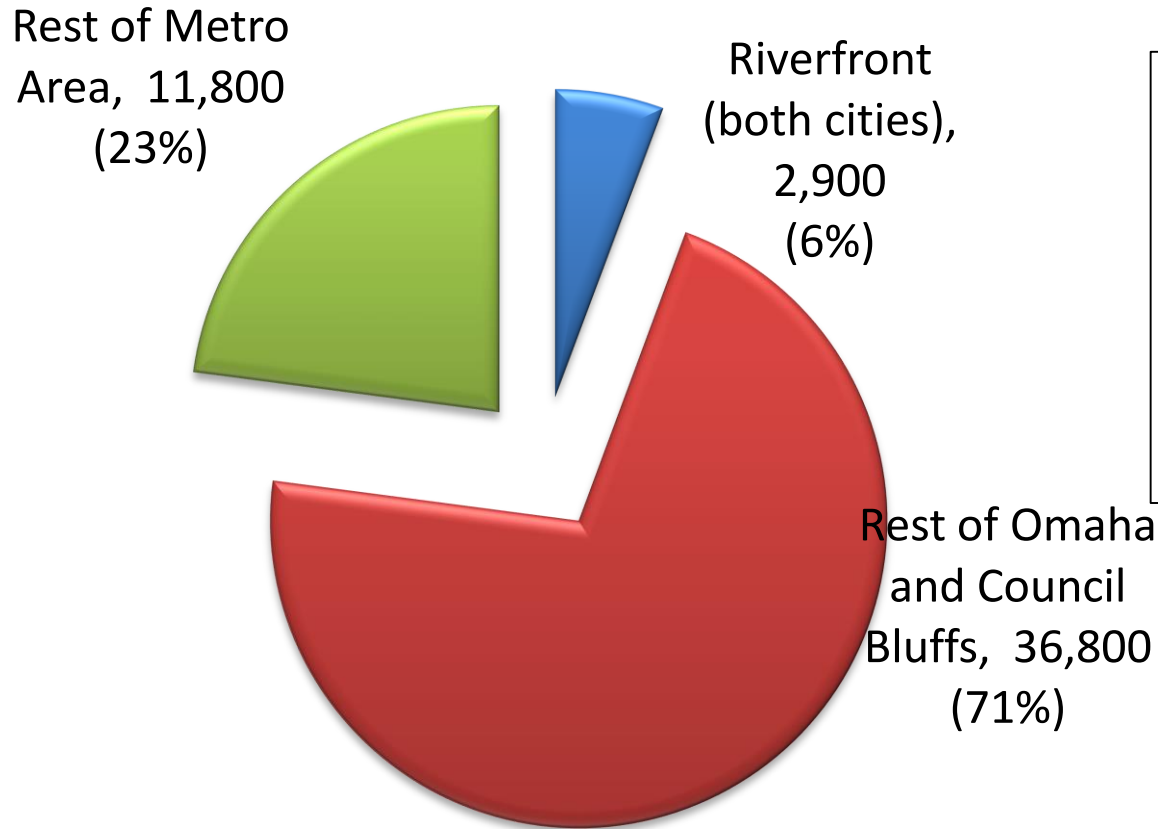
- Few or no children
- Single, newly married, or older empty nesters
- Well educated; information tech savvy
- Relatively high per capita income (or college students)
- Transit riders/low automobile usage
- Physically active, even if just “dog walkers”
- Propensity toward multi-family housing
- Propensity toward older city housing or new housing in older suburbs
- Active in community/volunteering

Urban Prospect Households: Riverfront, Cities, Metro Area



Statistical area for
Riverfront metrics

Urban Prospect Households: Riverfront, Cities, Metro Area



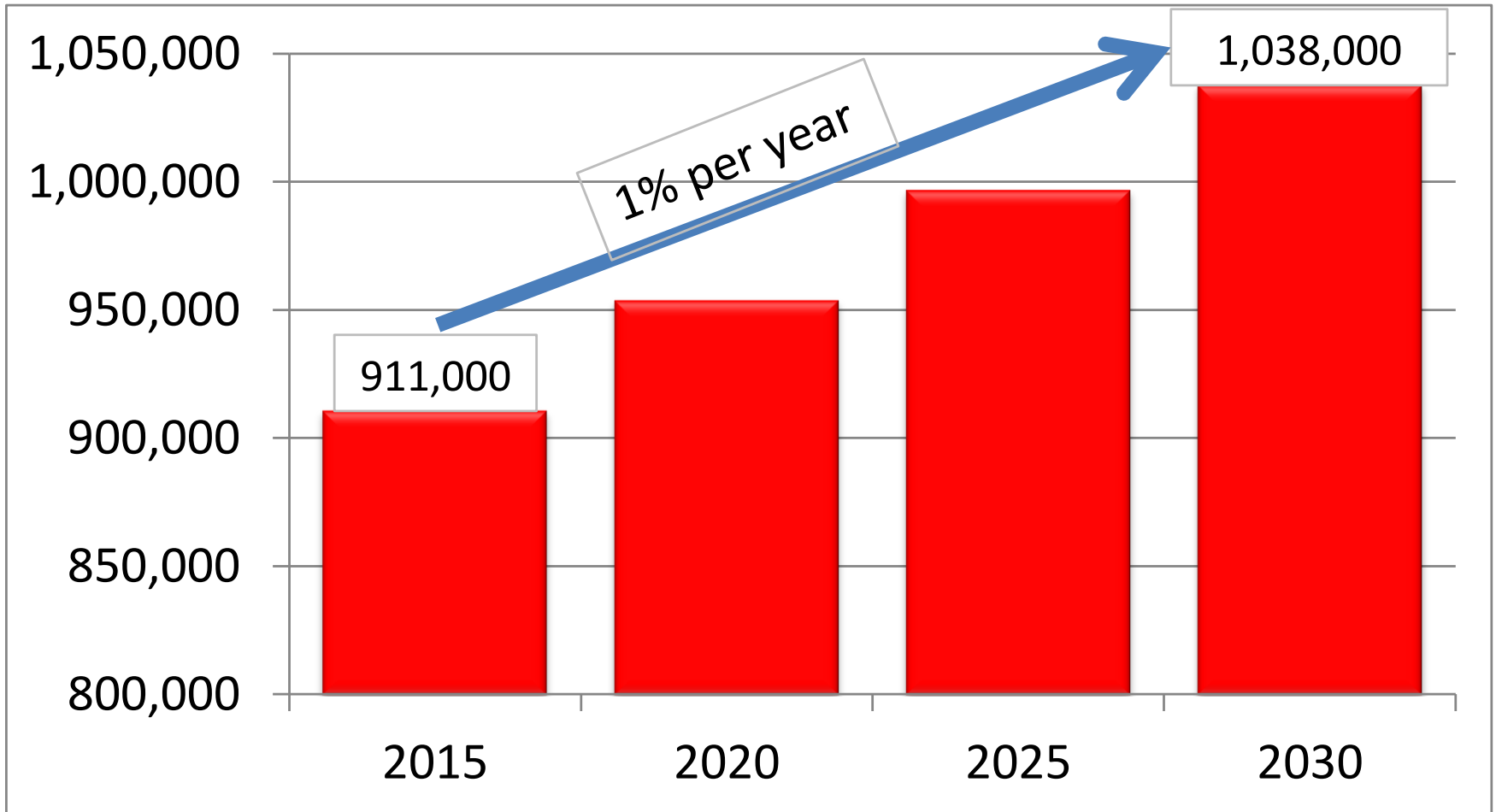
**There's a lot of
market out
there!**

TOTAL: 51,500

46% of current Riverfront residents
20% of all other Omaha and Council Bluffs residents
8% of all other metro area residents

Population Projections to 2030

Sources: U of Nebraska, Woods & Poole, Development Strategies



**Next 15 Years:
127,000 more residents**

**50,000 more households
(7,500 "urban prospects")**

Employment in Metropolitan Area, 2030



675,000 to 725,000

BASED ON POPULATION GROWTH

- 2012 Jobs = 576,000
 - 65% of Population
 - Accounts for multiple job holders
 - Accounts for non-residents commuting in
- 2030 Population = 1,038,200
 - 65% = 675,000 (increase of 99,000)
 - Increasing share of “urban professionals” and “downtown” kinds of households

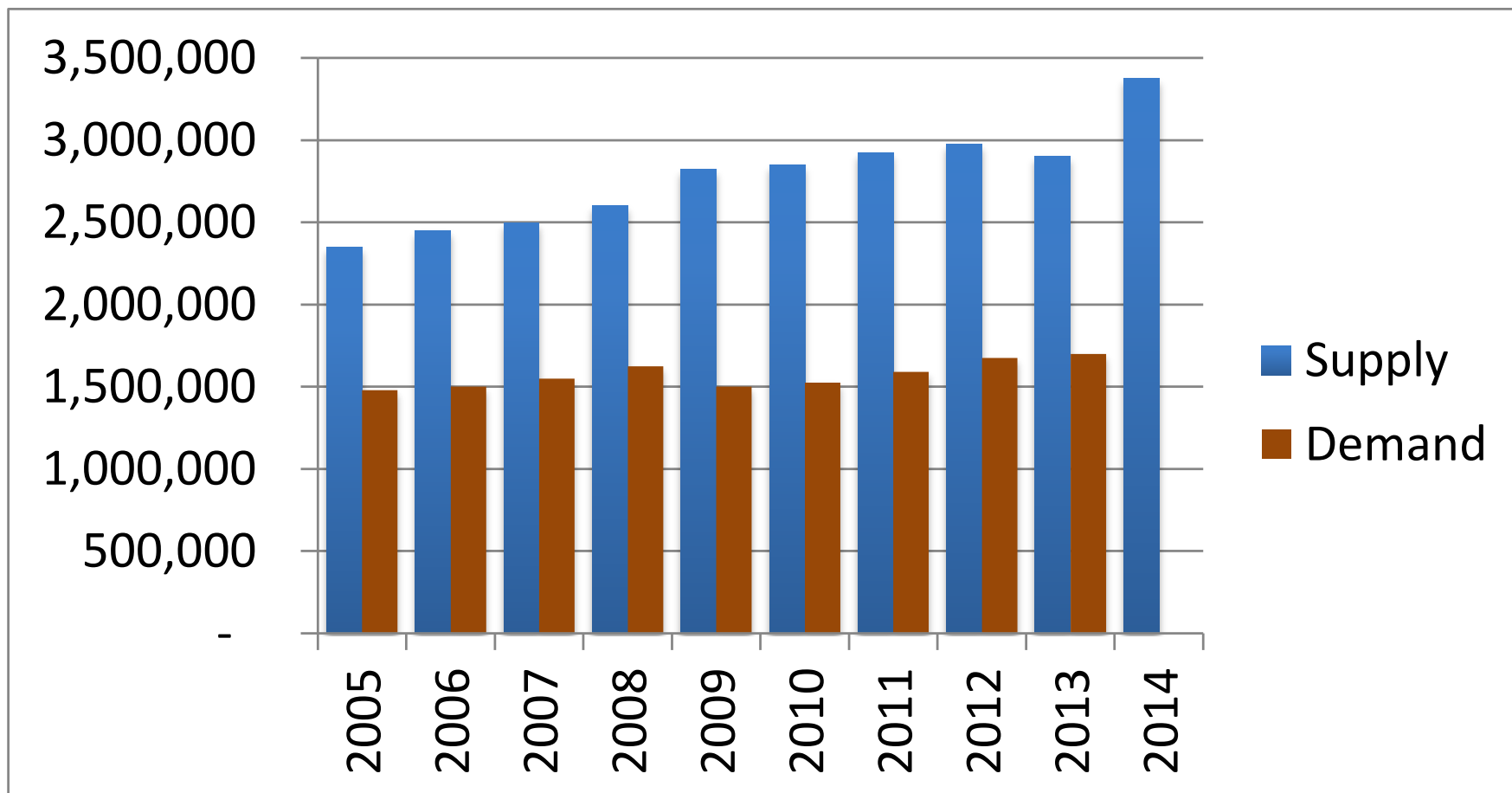


BASED ON UNL PROJECTIONS

- 2012 Jobs = 576,000
- Annual Average Employment Growth
 - 2010 to 2020 1.5%
 - 2020 to 2030 1.2%
- 2030 Employment = 722,500

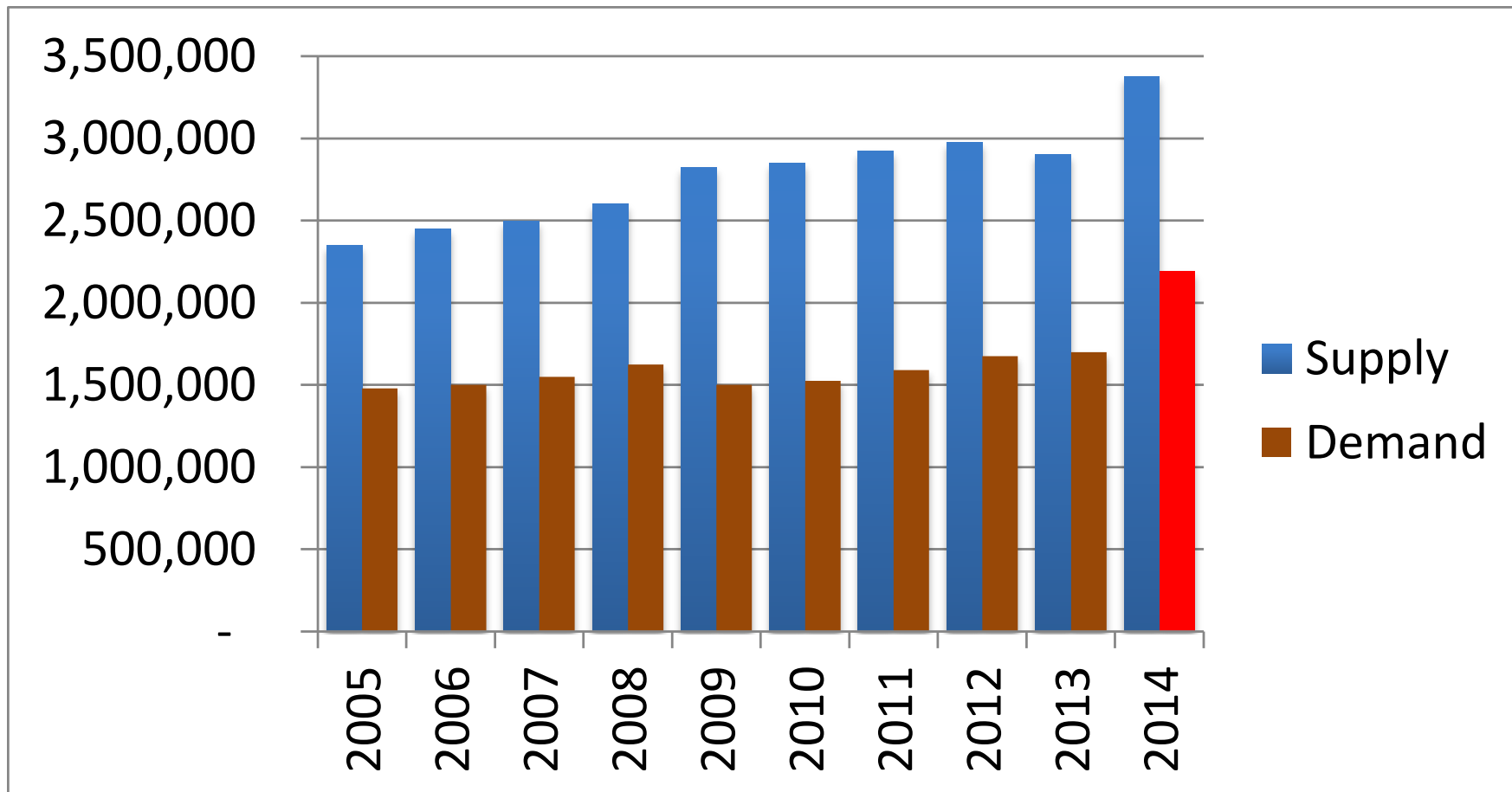
**Net Additional Jobs:
100,000 to 150,000**

Visitor Potential: Filling up those Hotels!



- Average Annual Occupancy (2005-2013): 58%
- Peak (2008) 63%
- Trough (2009) 53%

Visitor Potential: Filling up those Hotels!



- Assumed 2014 Occupancy 65%
 - Equivalent to Council Bluffs 2013
- Additional Visitors 500,000
- Additional Spending \$70 million

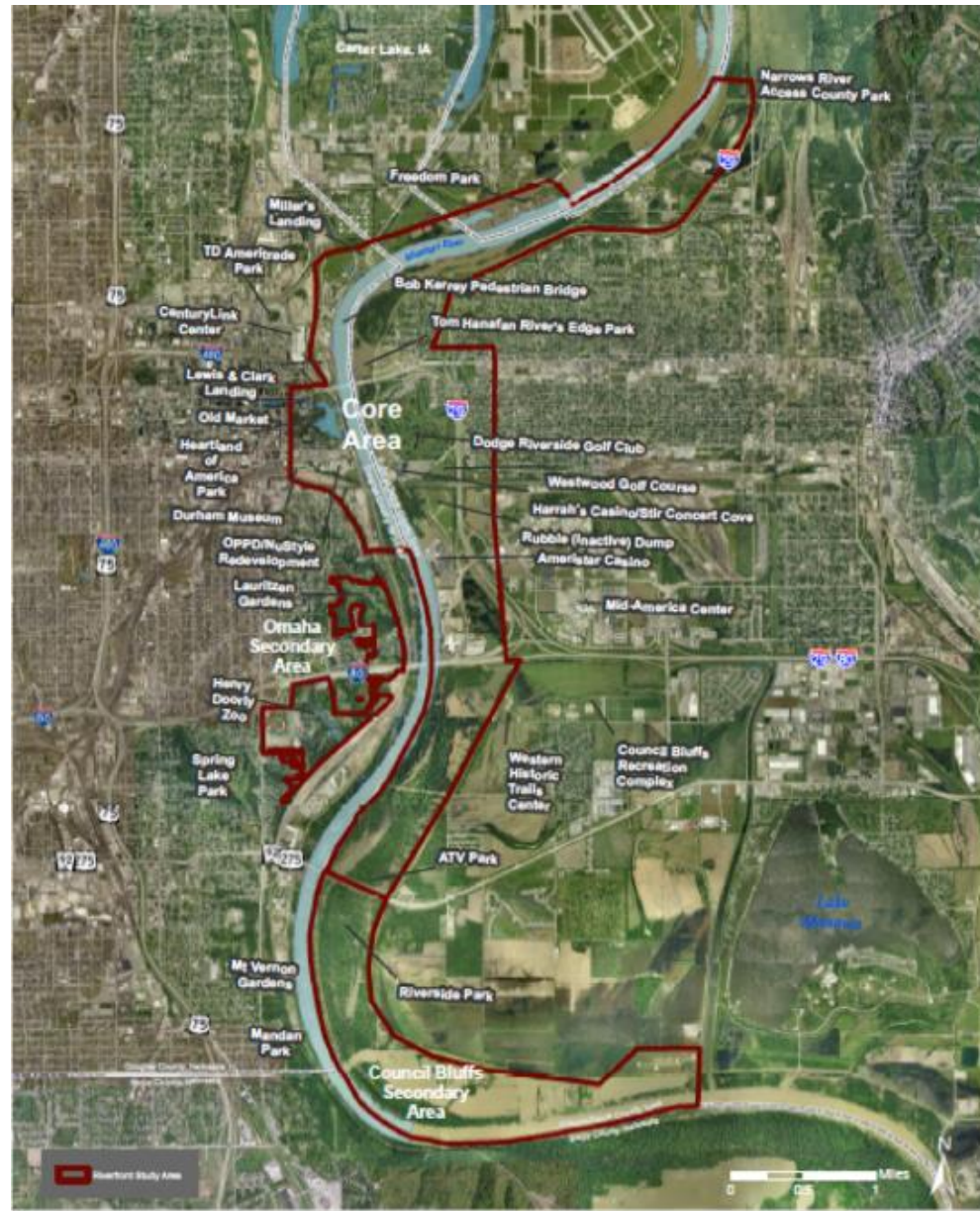
**And that's just
Douglas County!**

Market Overview: Activating the Riverfront

- 24/7 **RESIDENTS**: LIVING IN URBAN SETTINGS
 - Potential market of **50,000 to 57,000 households** by 2030
- 10/5 **EMPLOYEES**: WORKING IN URBAN SETTINGS
 - Potential net growth of **100,000 to 150,000 employees** by 2030
- 12/7 **VISITORS AND PATRONS**: PLAYING, SHOPPING, EATING, LEARNING
 - Potential growth of **500,000 visitor days** *per year*

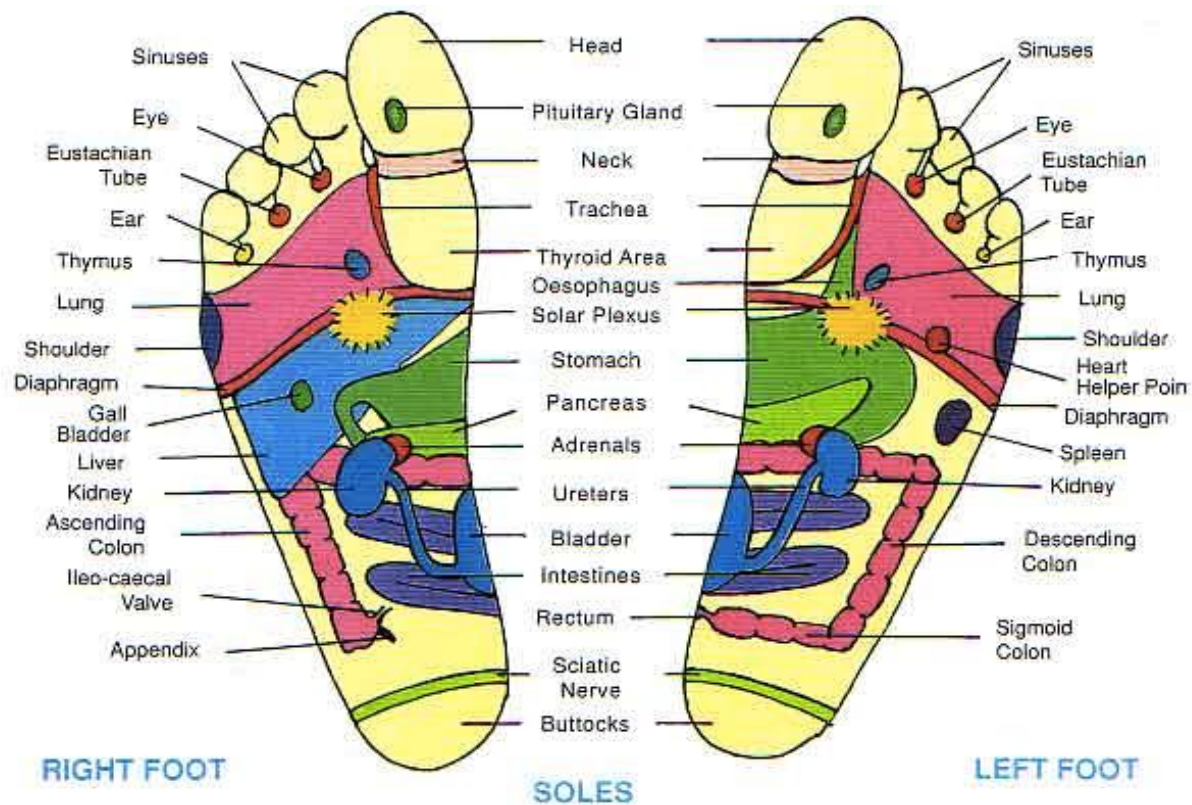
Market is an OPPORTUNITY, not a limitation.

Core Principles



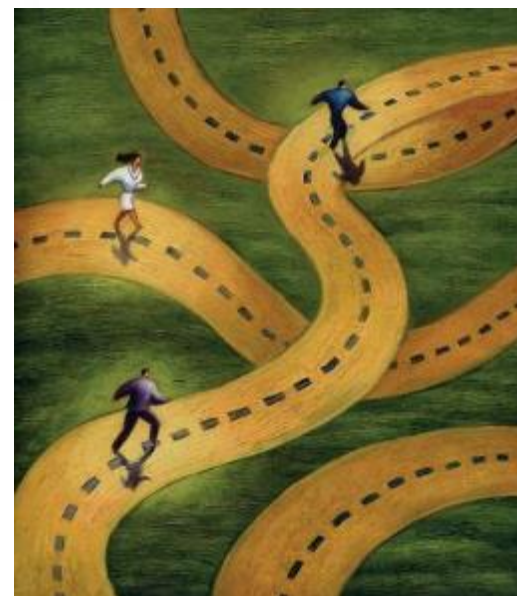
Core Principles

ONE RIVERFRONT



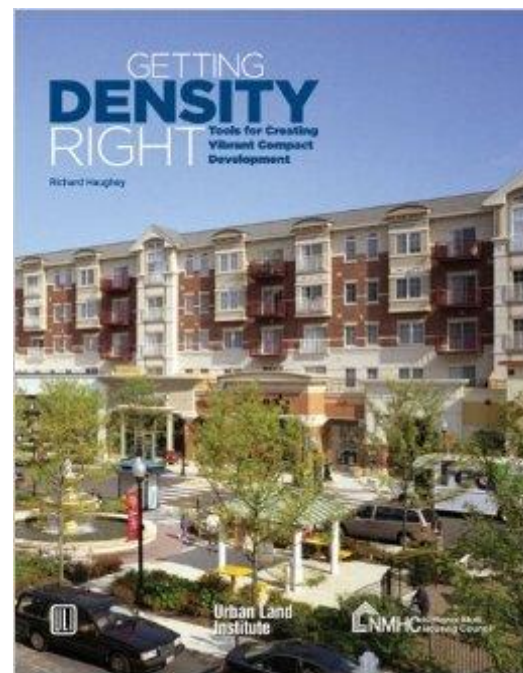
Core Principles

CONNECTIVITY



Core Principles

DENSITY



Core Principles

MIXED USE



Core Principles

DESIGN AND SCALE



Core Principles

EXPERIENCE THE RIVER

FALL IN LOVE... AGAIN



Core Principles

REMEMBER THE FUTURE



Core Principles

One Riverfront



Connectivity

Density

Mixed Uses

Design & Scale

Experience the River

Remember the Future

Understanding your region

Links to opportunities



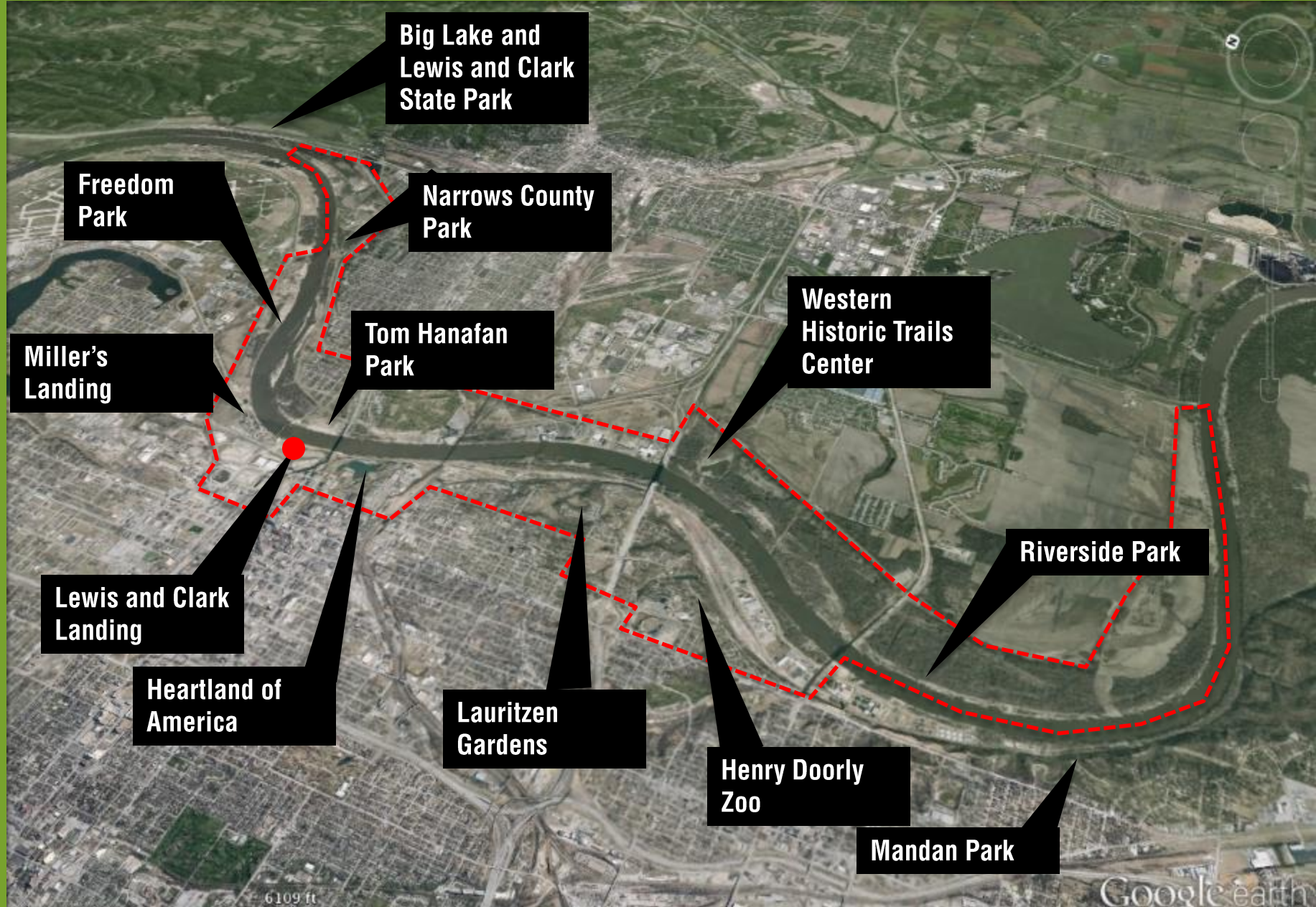






Photo credit: Sasaki

Use challenges to guide your priorities

- Weak connections
- Why go to the riverfront?
- River power
- Contamination legacy
- Strong connections to waterfront
- Improve attractions and activities
- Improve trail and river access





Tom Hanafan Park

Lewis and Clark Landing

Events

Programmed events are important in activating and animating riverfronts: events give people a reason to come to a river.

- Omaha and Council Bluffs blessed with many events, many venues
- Doesn't mean all is well
- **On the Omaha side it's been reported that:**
 - Some events outgrowing available riverfront space
 - Cost to rent public venues and parking costs are problems
 - Heartland America Park and Lewis & Clark Landing short on electrical and water infrastructure
 - Some small events can't operate in shadow of large events
 - Natural and manmade barriers limit connectivity to river
 - Aksarben Village is popular alternative venue

Events

On the Council Bluffs side we heard:

- Lack of calendar coordination with Omaha can cause schedule conflicts and decreased attendance at Nebraska-side events
- Without regular coordination between cities danger of duplication of venues, unnecessary competition
- Casino support of entertainment and events will remain - if the casino business itself stays strong
- Center of city not near river



Events

To address obstacles facing special events on the river, it is strongly suggested that, on the Omaha side:

- City consider reduced event venue rental fees, making capital infrastructure improvements, and reviewing competitiveness of its parking charges
- Evaluation of all city owned riverfront properties should be conducted to insure highest and best uses
- Ongoing discussions should be held among public and private event producers and organizations to insure all events are leveraged to maximum economic benefit of all
- Efforts should continue to solve connectivity problems, and to address lack of transportation along Riverfront



Events

To address obstacles facing events on or near the river, it is recommended that, on the Council Bluff's side:

Efforts continue to develop events that will survive ups and downs of casino industry

Efforts be undertaken to create new connections to river



For the benefit of both cities:

- Agree to coordinated scheduling of events, maximize attendance on both sides
- Agree to coordinate approaches to venue development, prevent costly duplications
- Consider joint new national-level festival:
 - Memphis in May International Festival
 - Spoleto in Charleston
 - southxsouthwest



Experiencing the Riverfront



Who

- Locals
- Regional visitors
- Tourists

Experiencing the Riverfront



Experiencing the Riverfront



- Relax and enjoy
- Get active
- On the water



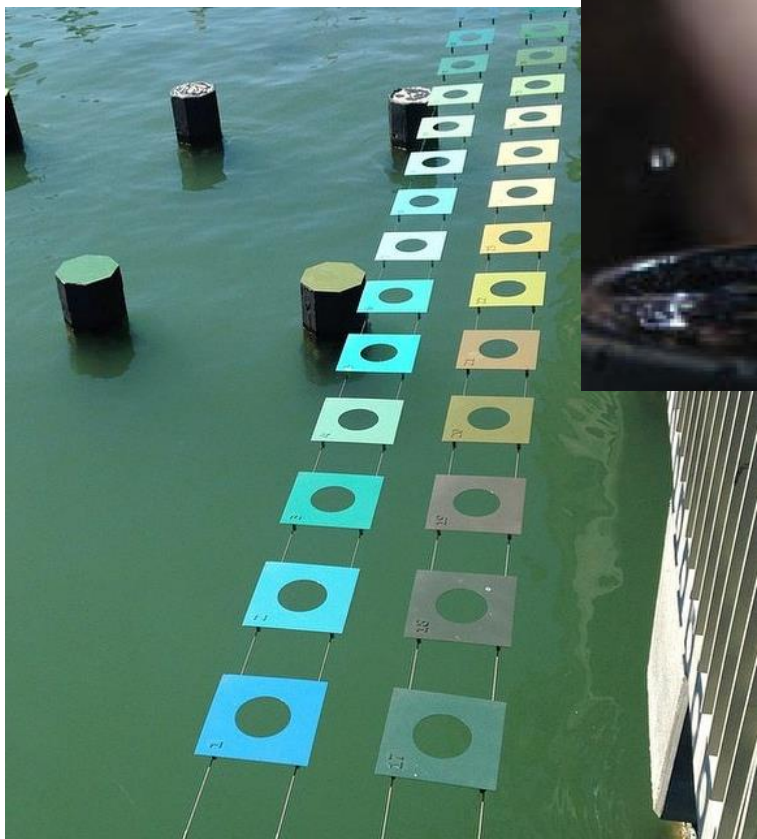
Discovering the Riverfront



- Professional Signage



Exploring the River - Science



Possible Partners

- Nebraska Wildlife Rehab
- Children's Museum
- Universities
- Area schools
- Nonprofits/foundations

Exploring the River – Natural Environment



Possible Partners

- Lauritzen Gardens
- Henry Doorly Zoo and Aquarium
- Creighton Green Jays
- UN-Omaha undergraduate and graduate research
- Area schools
- Nonprofits/foundations

Exploring the River – History



Possible Partners

- Durham Museum
- Union Pacific Railroad Museum
- Universities
- Area schools
- Nonprofits/foundations

Exploring the River – Arts and Culture



Possible Partners

- Old Market Galleries
- Universities
- Area schools
- Nonprofits/foundations

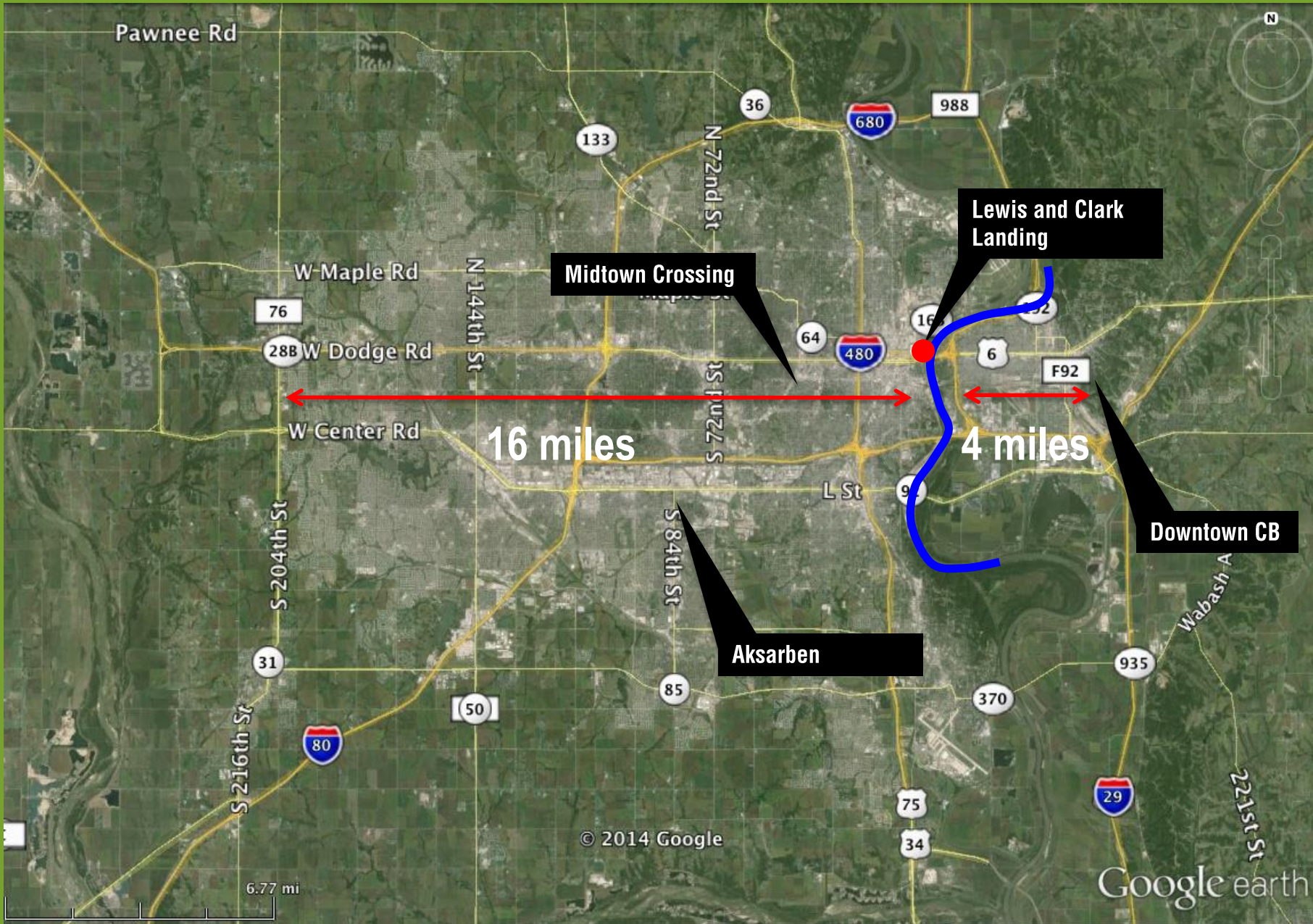


Experiencing the Riverfront

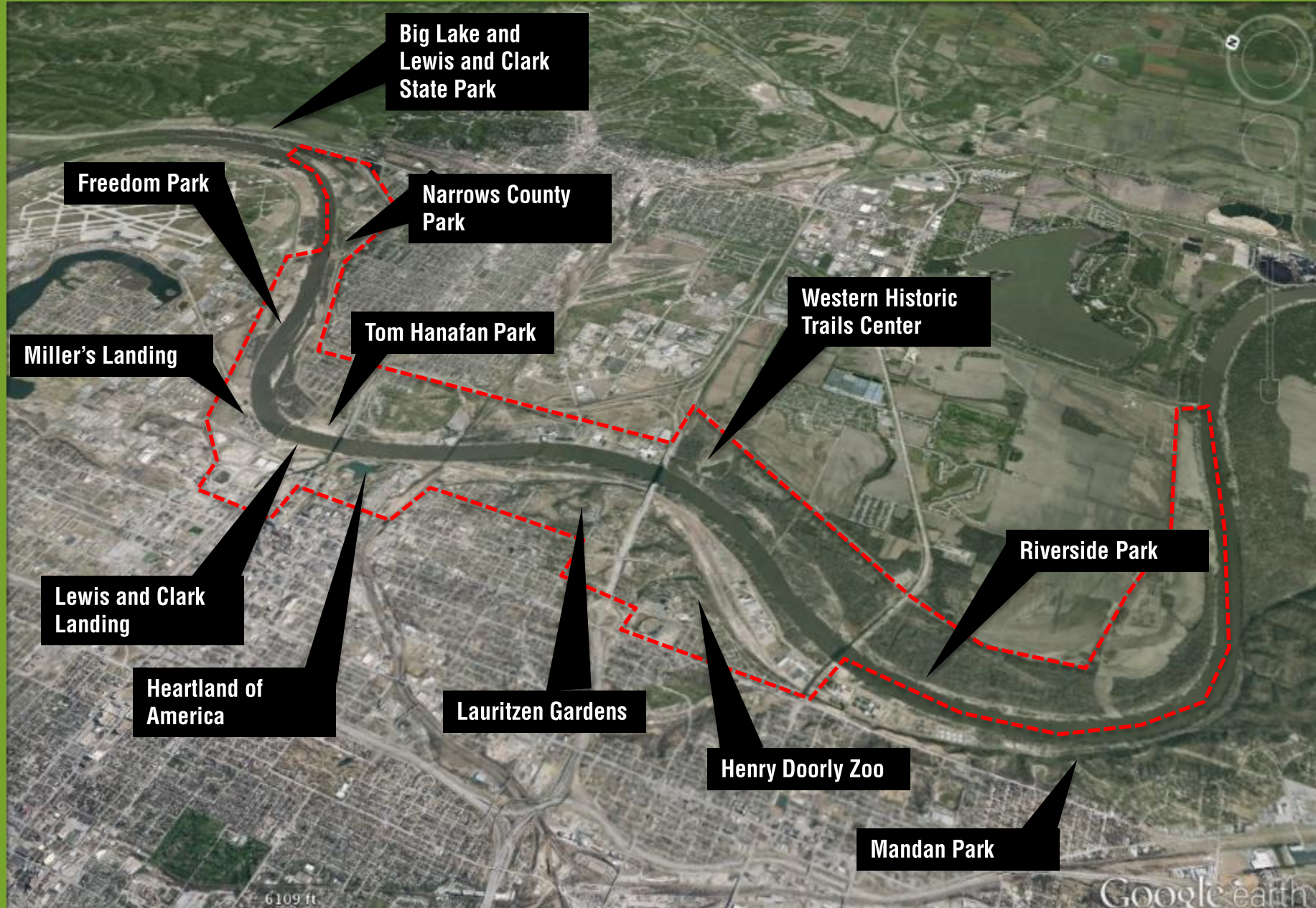
**“Successful riverfront development
doesn’t have to start on a grand scale.**

**Sometimes the smallest projects are the
most potent.”**

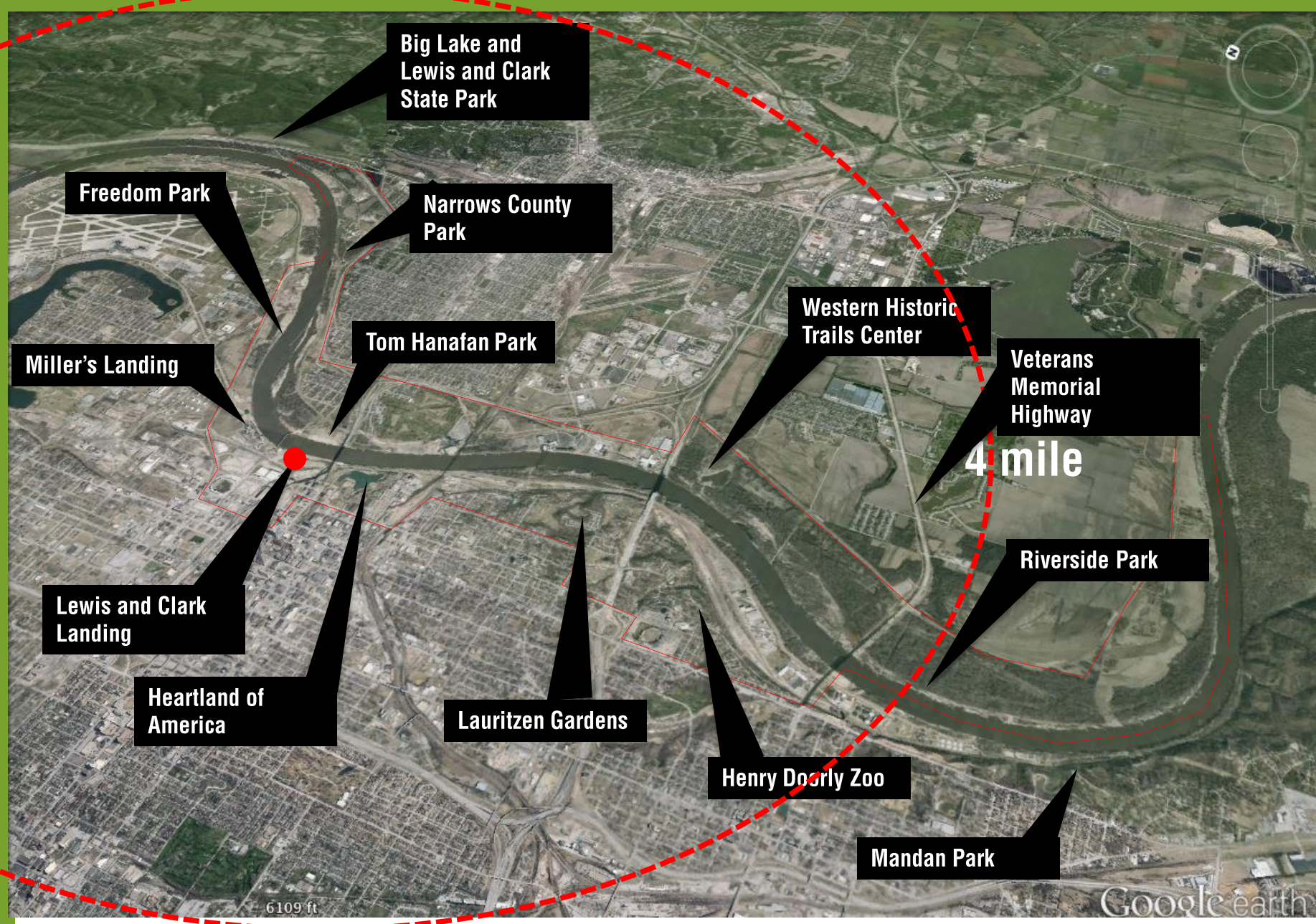
- RIVERLIFE



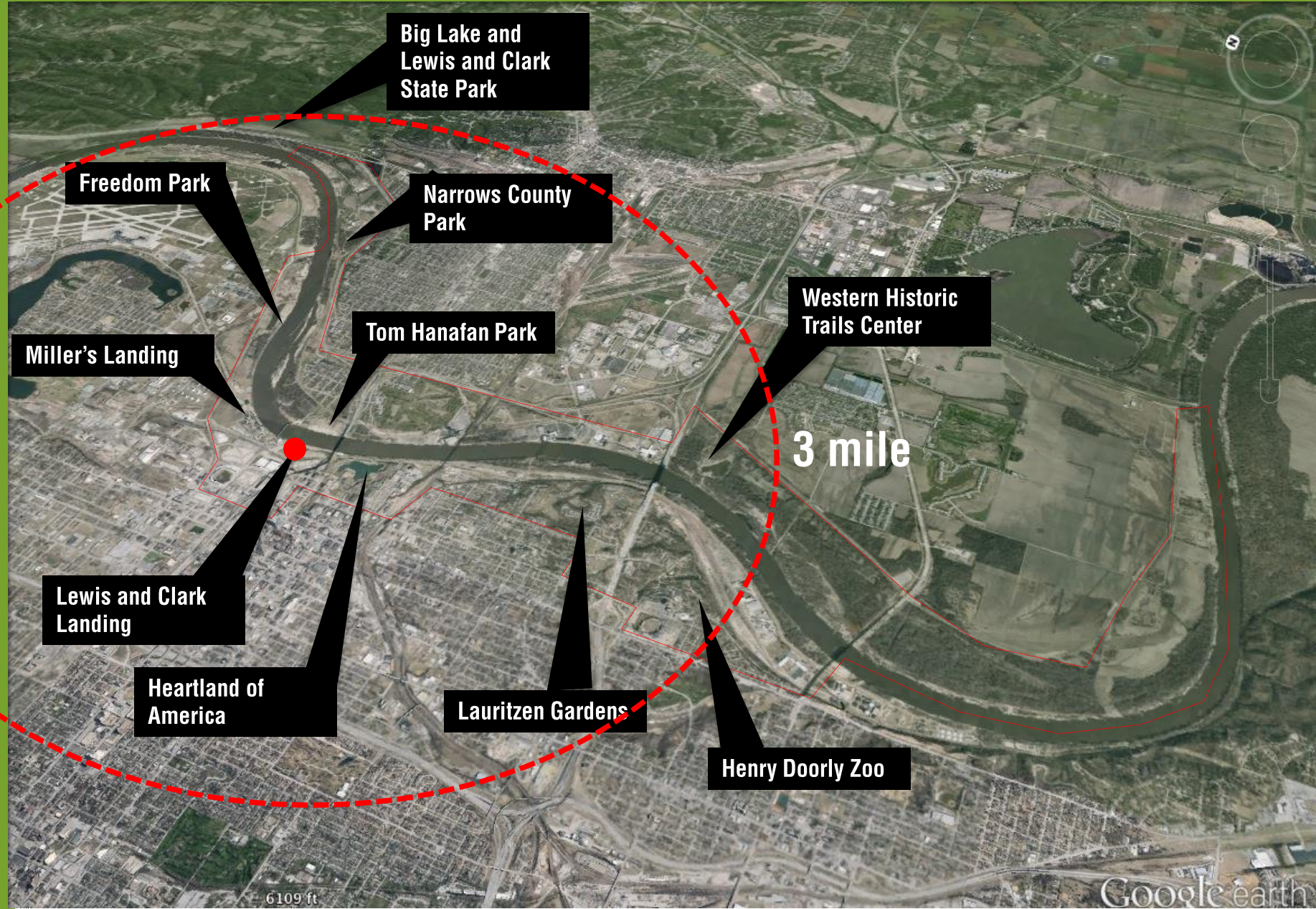
Competing venues to the riverfront



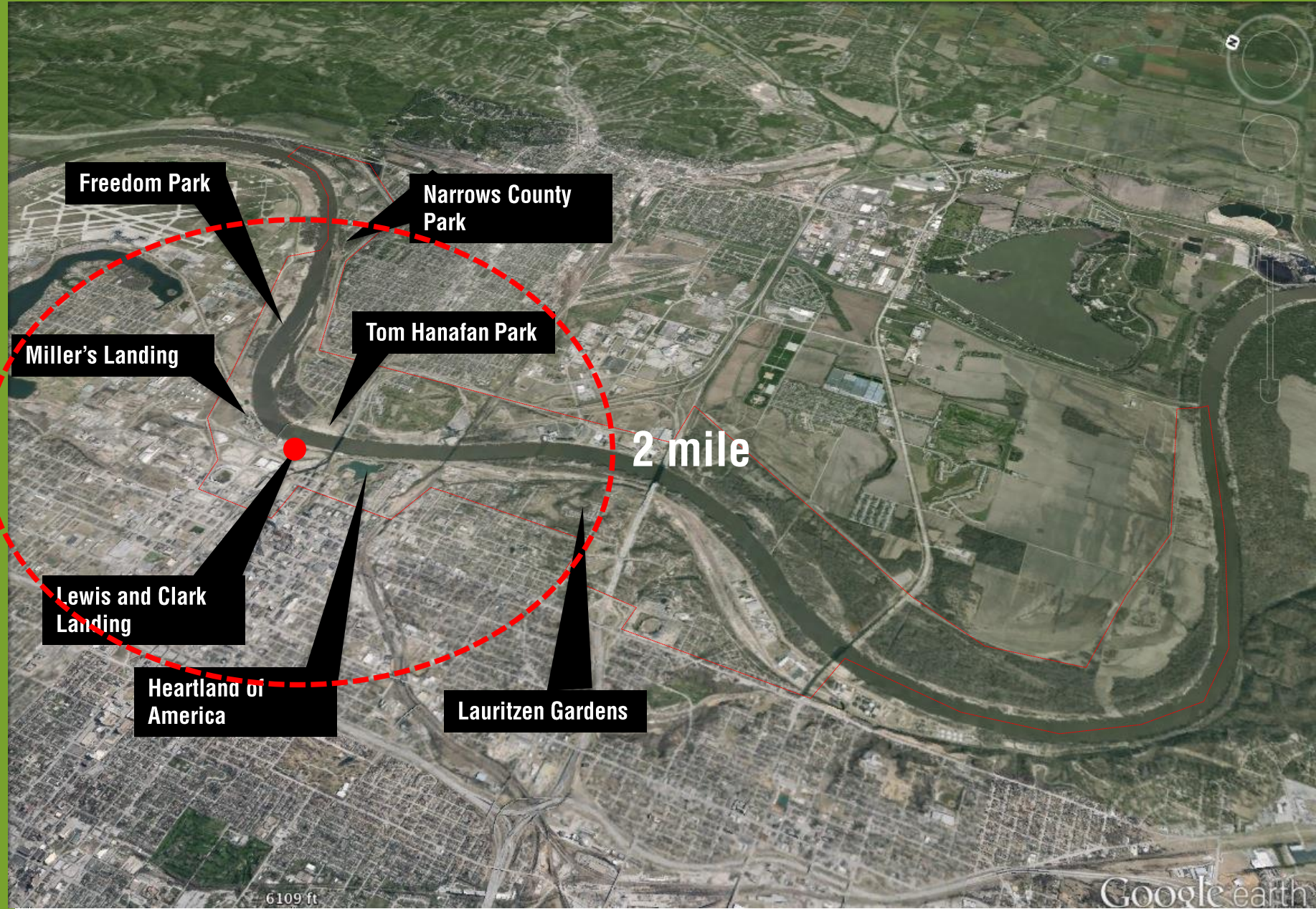
20 miles of riverfronts



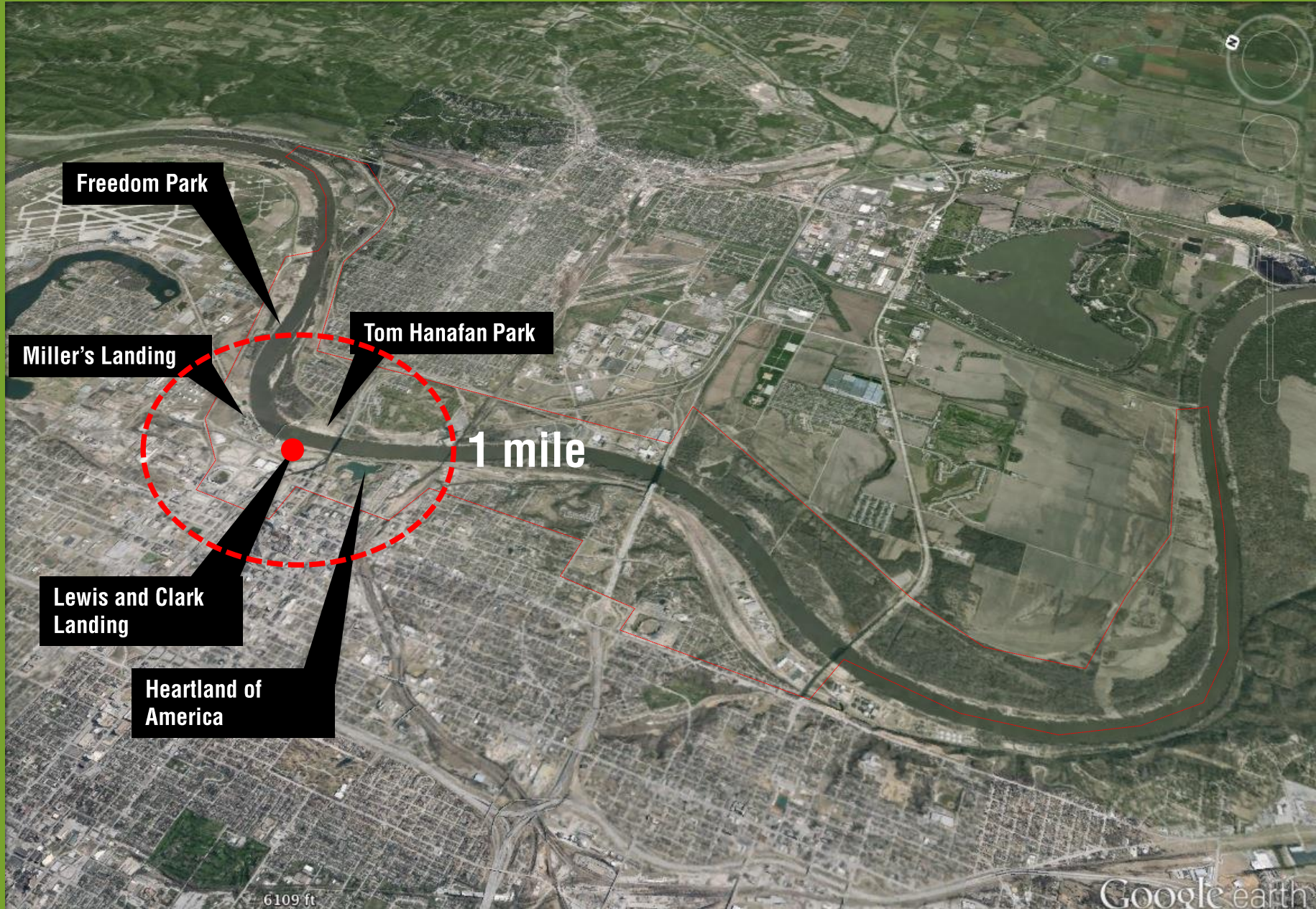
Within a 4 mile radius of Lewis and Clark Landing



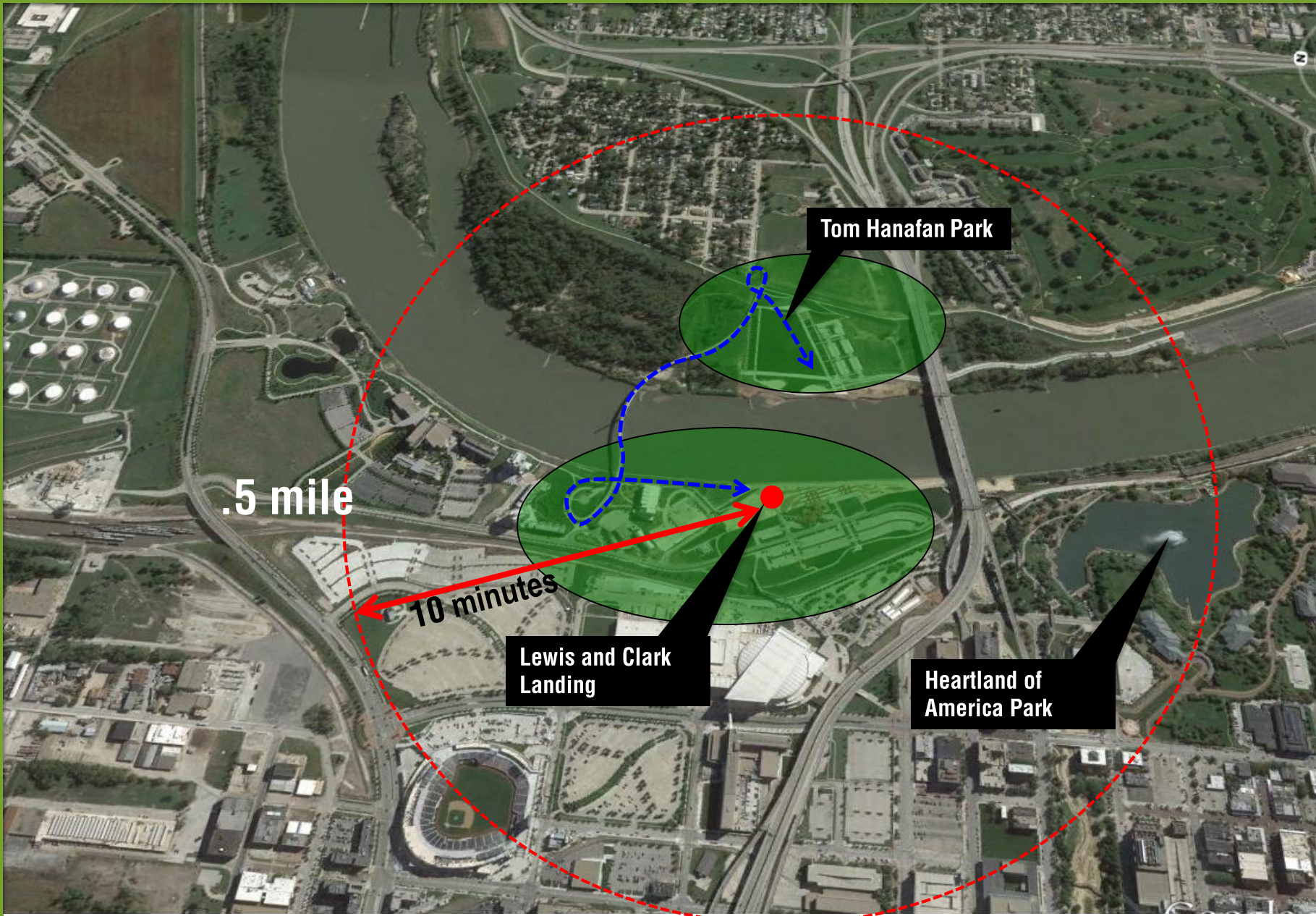
Within a 3 mile radius of Lewis and Clark Landing

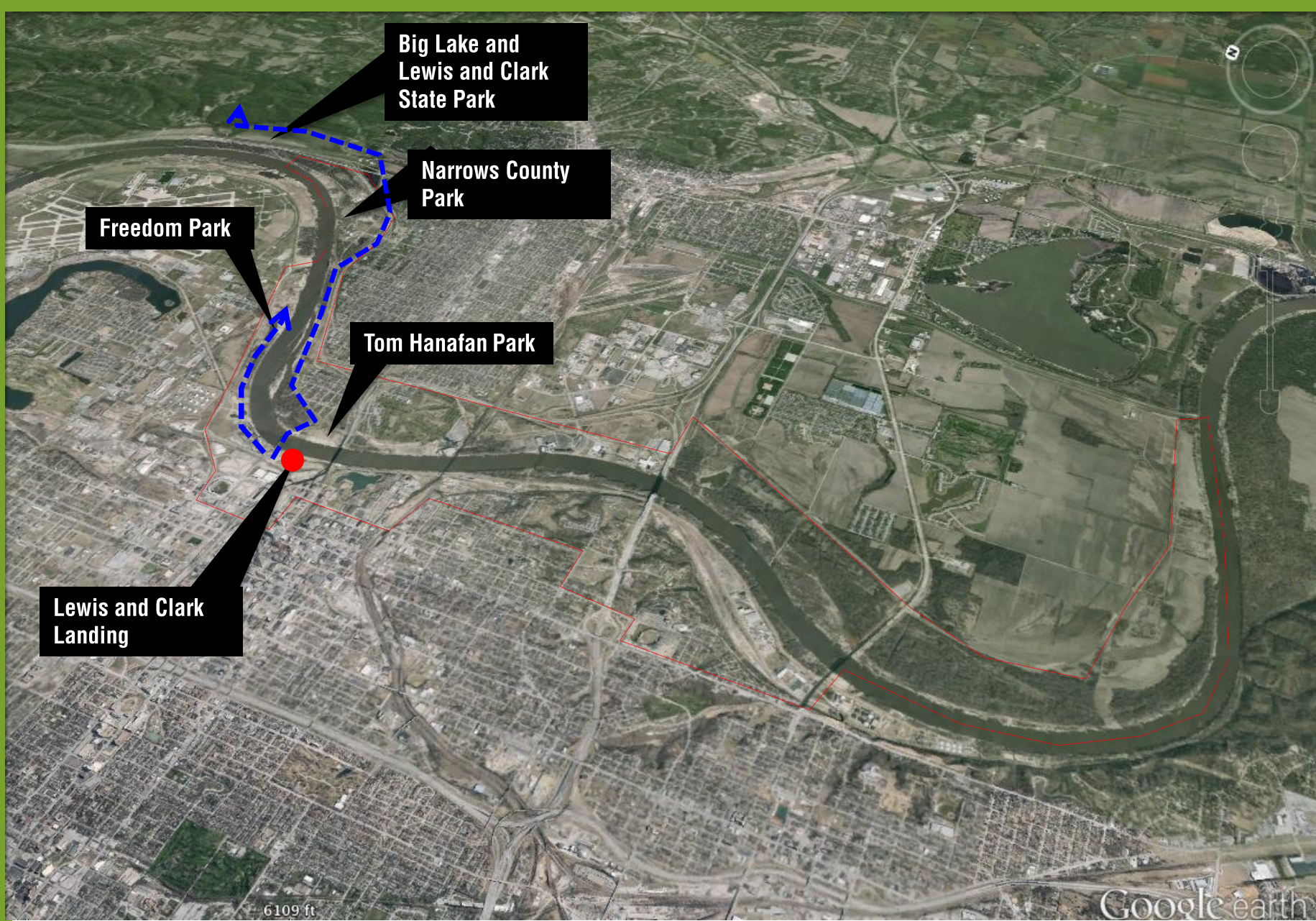


Within a 2 mile radius of Lewis and Clark Landing



Within a 1 mile radius of Lewis and Clark Landing

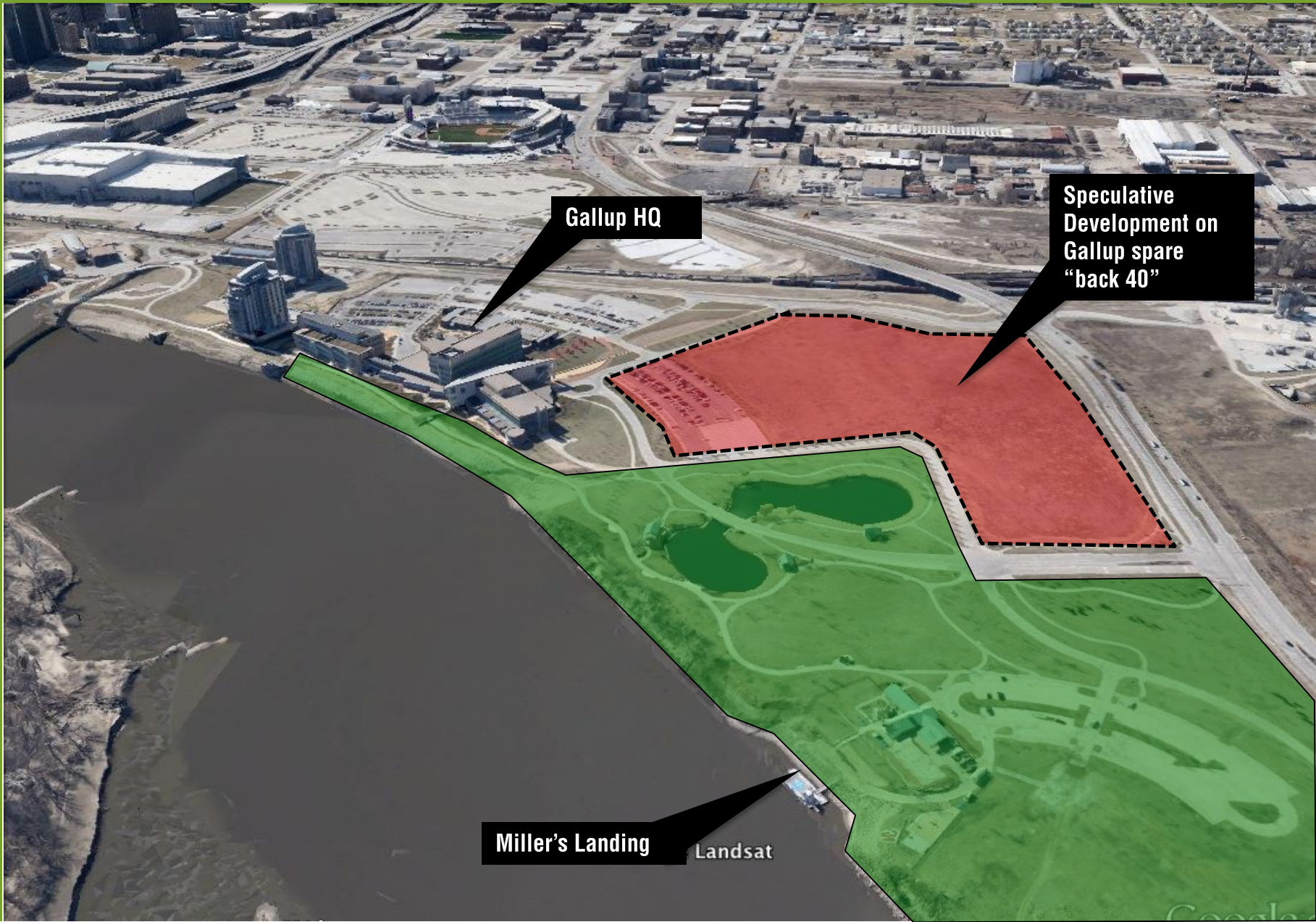




6109 ft

Google earth

A trip upriver (6 miles roundtrip)



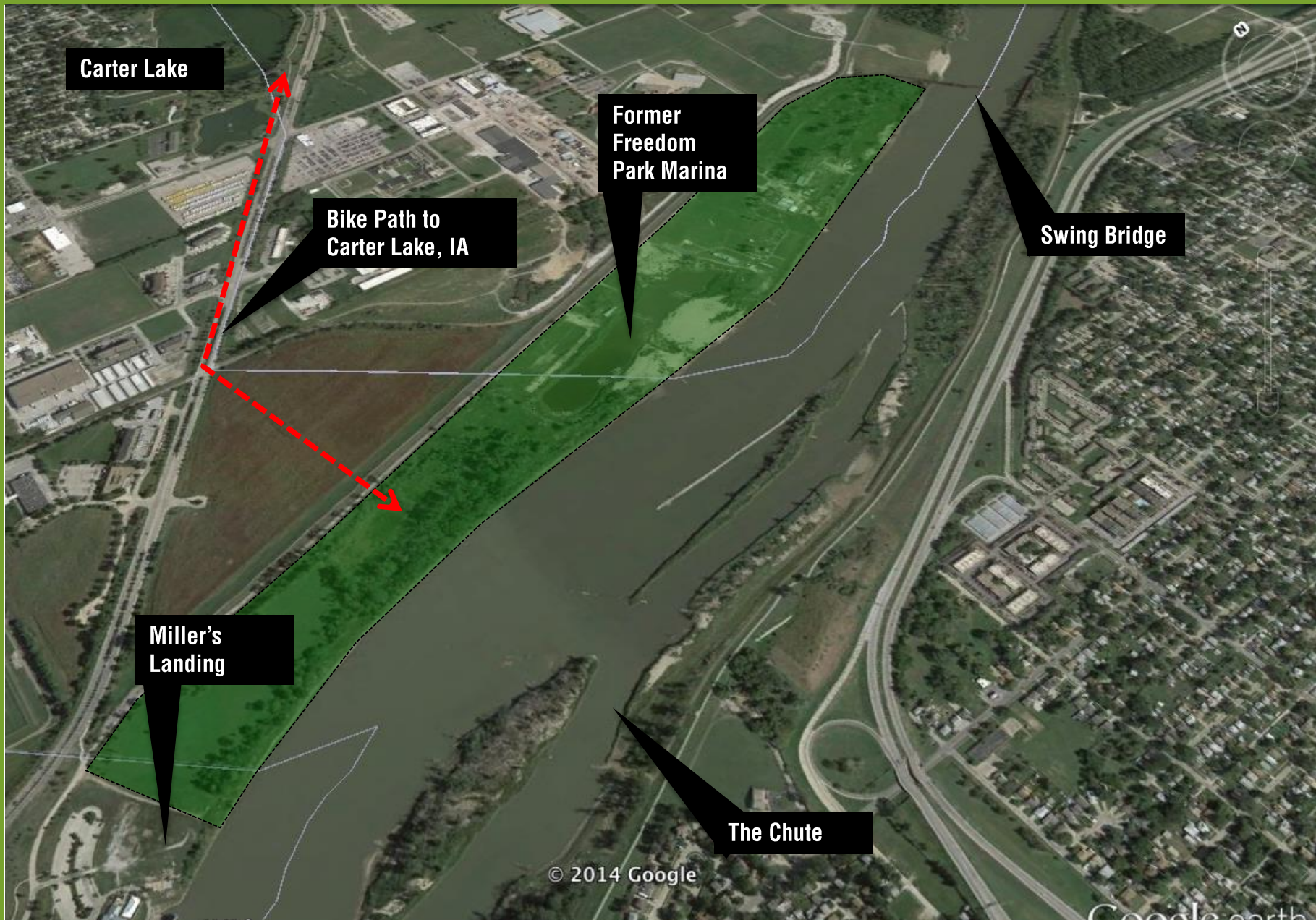
Gallup HQ

Speculative
Development on
Gallup spare
"back 40"

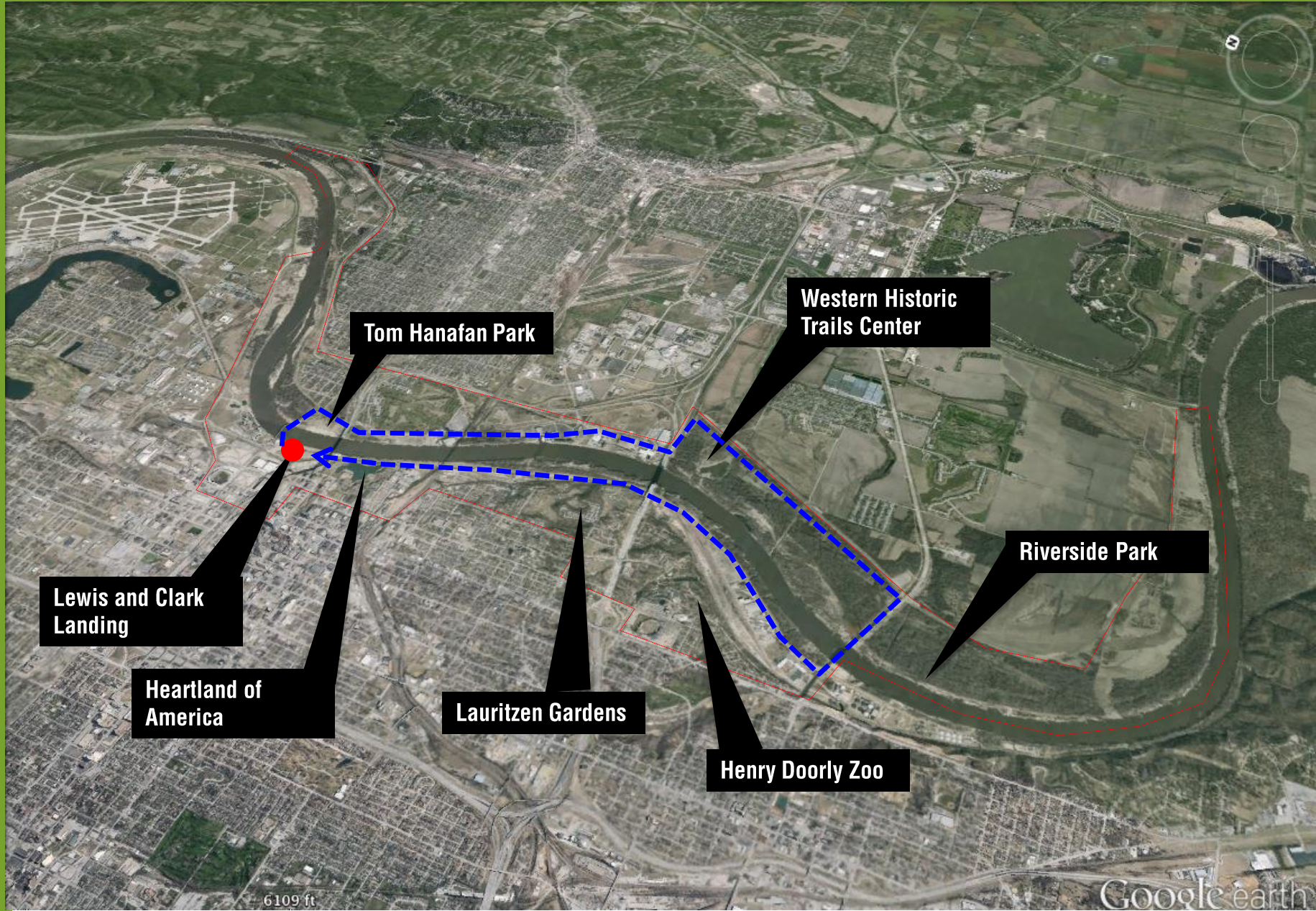
Miller's Landing

Landsat









Lewis and Clark Landing

Heartland of America

Tom Hanafan Park

Lauritzen Gardens

Henry Doorly Zoo

Western Historic Trails Center

Riverside Park

6109 ft

Google earth



River Restoration

Residential development

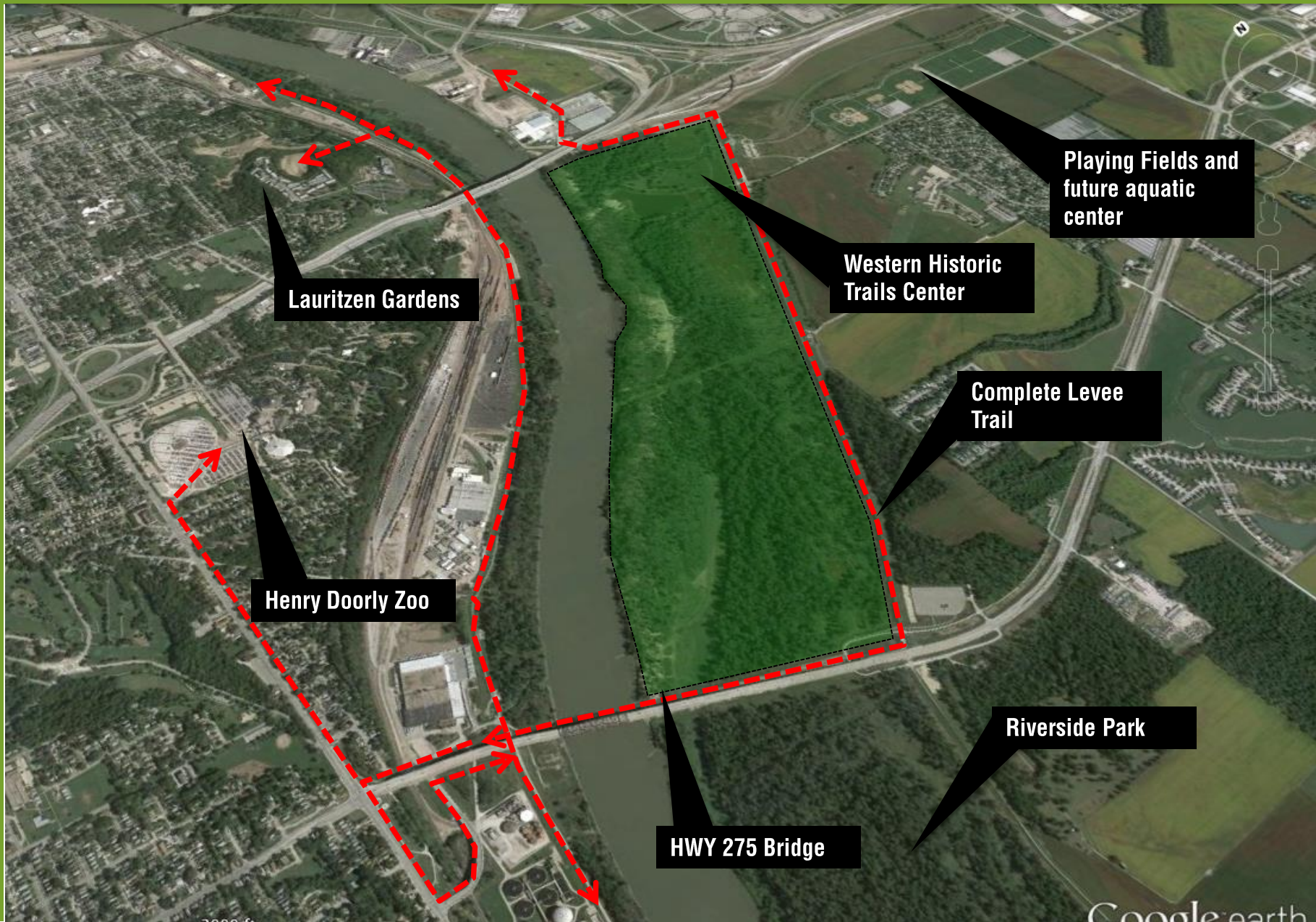
Gravel Pile

Harrah's Casino

Ameristar Casino

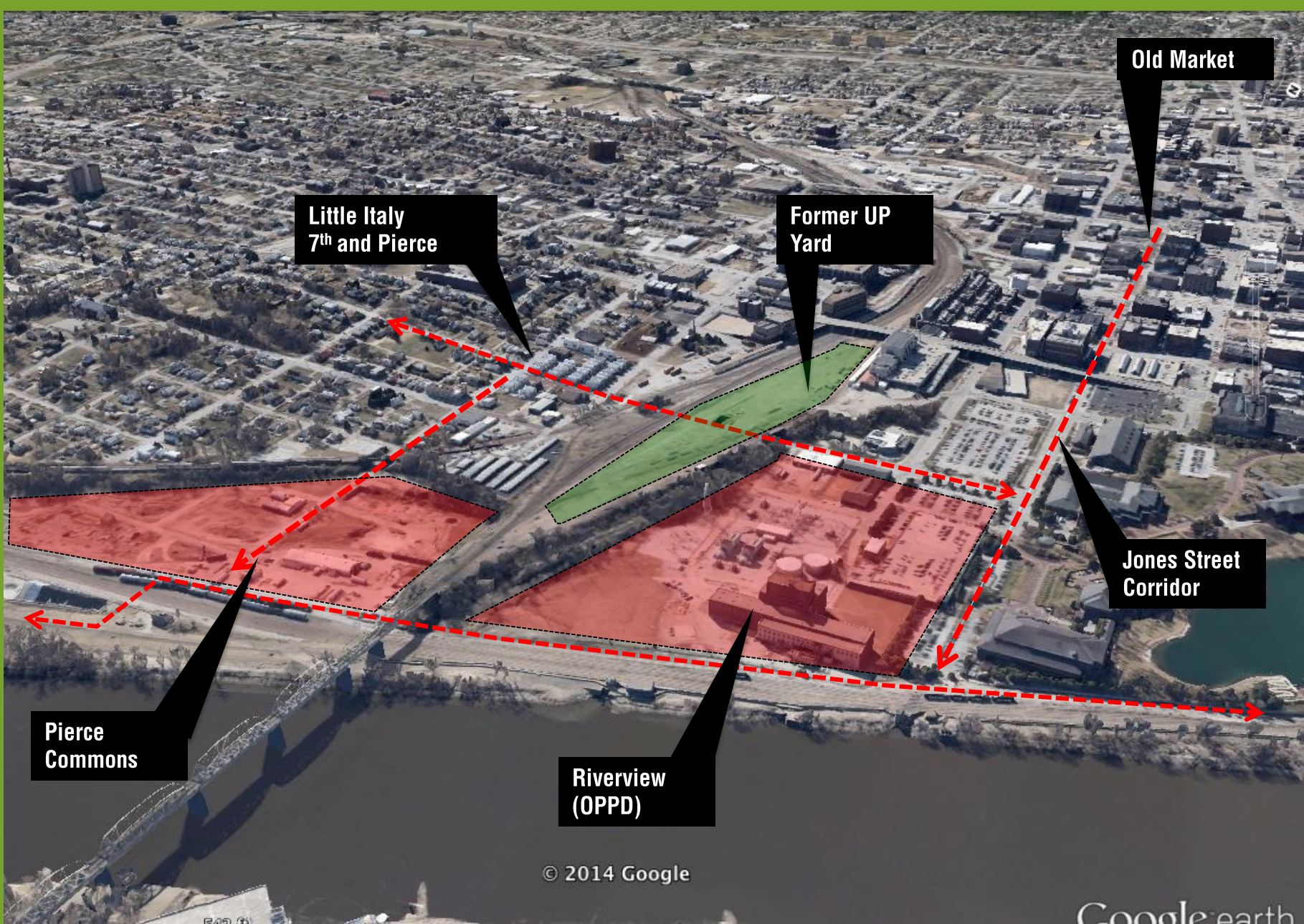
© 2014 Google

Google e



2000 ft

Google earth



Little Italy
7th and Pierce

Former UP
Yard

Old Market

Jones Street
Corridor

Pierce
Commons

Riverview
(OPPD)

© 2014 Google

Google earth



Lewis and Clark Landing

Image Landsat

Google earth

41°15'54.37" N 95°55'09.40" W elev 987 ft eye alt 8288 ft



Downtown

5 minutes

.25 mile

Lewis and Clark Landing

1834
Old Market

Image Landsat

Google earth

41°15'54.37" N 95°55'09.40" W elev 987 ft eye alt 8288 ft



Downtown

10 minutes

.5 mile

Lewis and Clark Landing

1834 Old Market

Image Landsat

Google earth

1993

41°15'54.37" N 95°55'09.40" W elev 987 ft eye alt 8288 ft



Downtown

15 minutes

Lewis and Clark Landing

.75 mile

Image Landsat

Old Market

1834

1993

41°15'54.37" N 95°55'09.40" W elev 987 ft eye alt 8288 ft

Google earth



**Lewis and Clark
Landing**

10 minutes

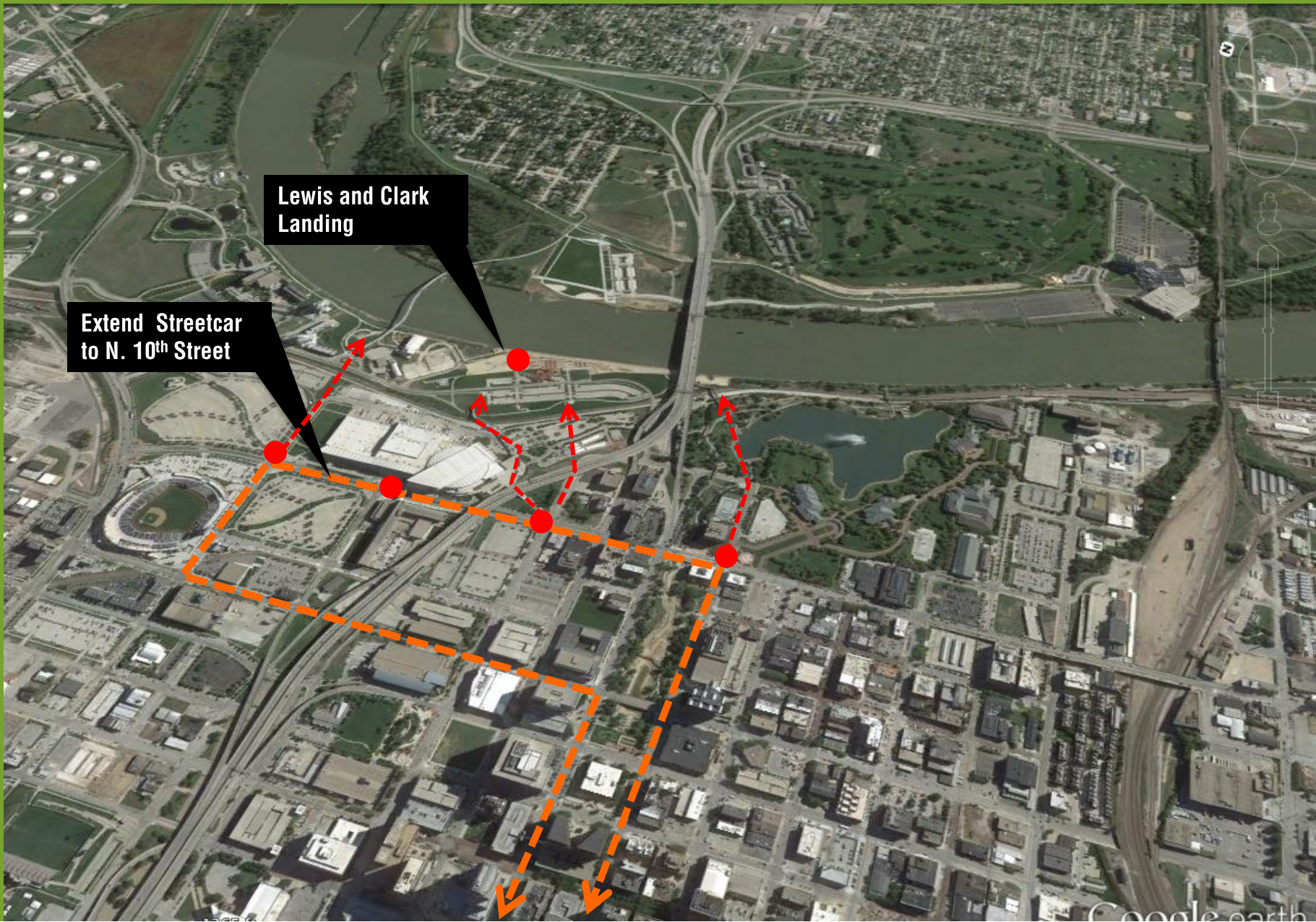
.5 mile

Image Landsat

Google earth

1993

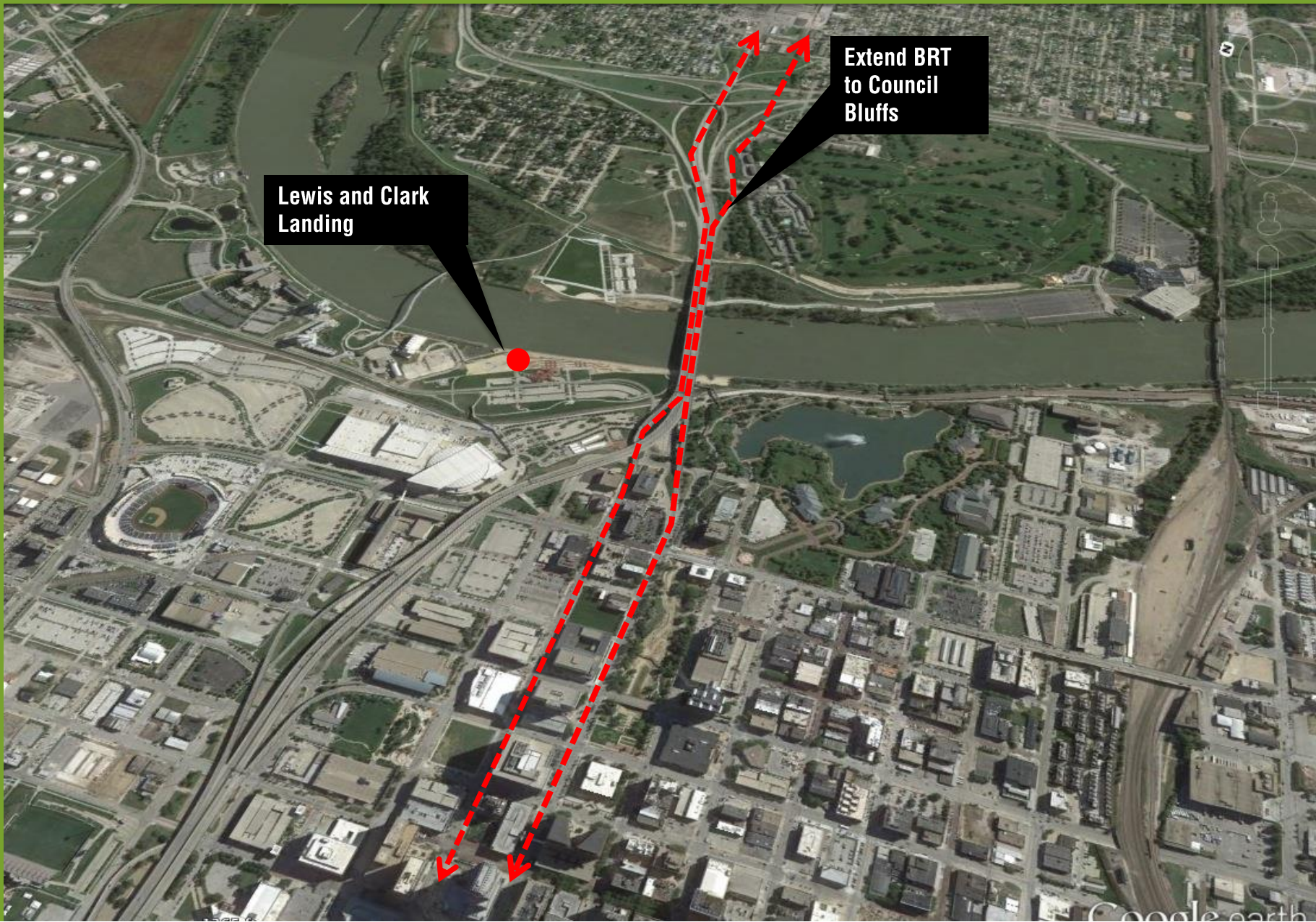
41°15'54.37" N 95°55'09.40" W elev 987 ft eye alt 8288 ft



Extend Streetcar to N. 10th Street

Lewis and Clark Landing

Google earth



Lewis and Clark Landing

Extend BRT to Council Bluffs

Google earth



Lewis and Clark Landing

~1 mile



Lewis and Clark Landing

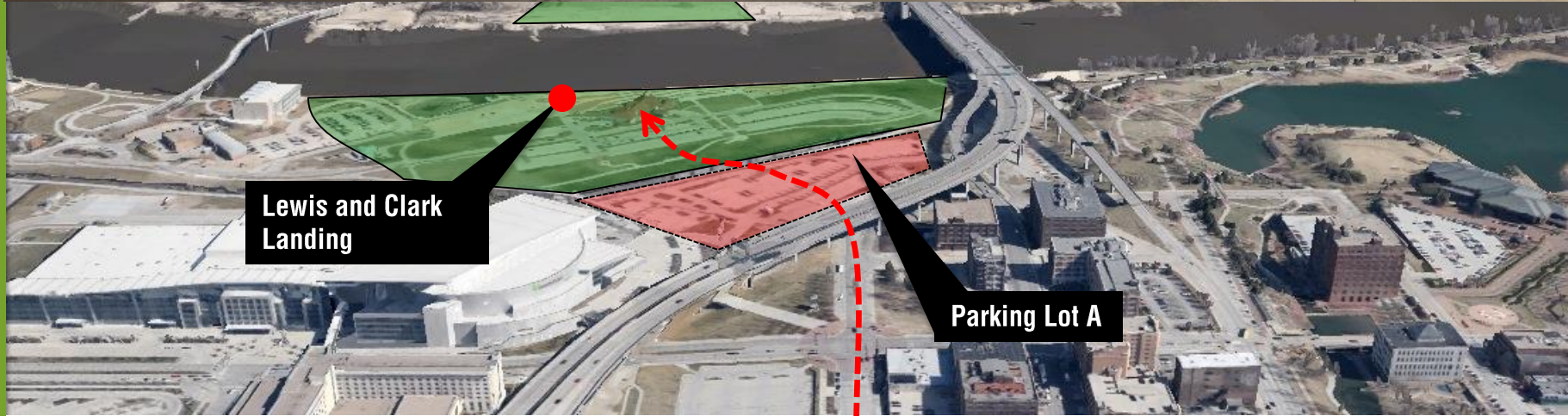
~1 mile



Lewis and Clark Landing

Capitol Street Development

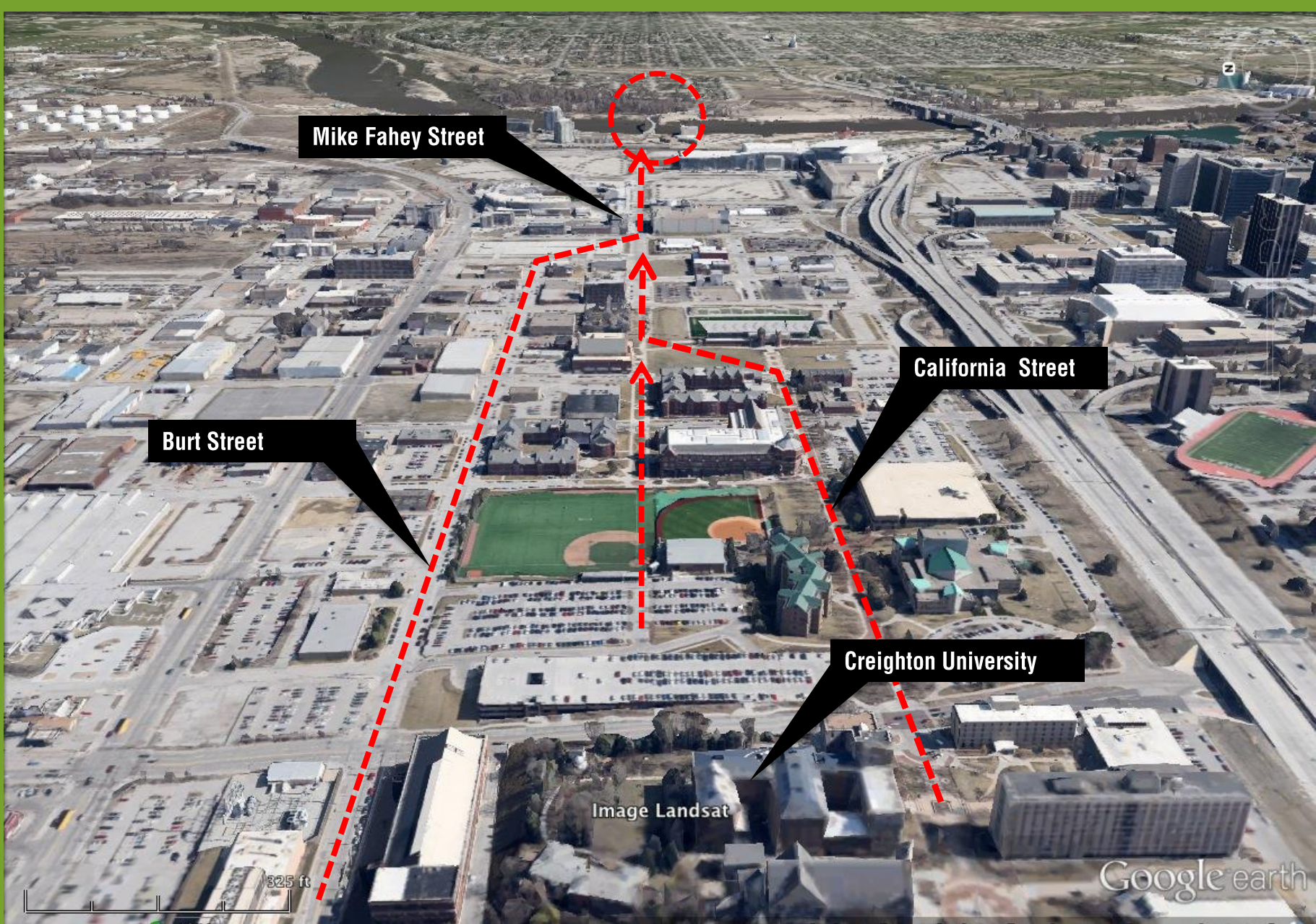
Image Landsat

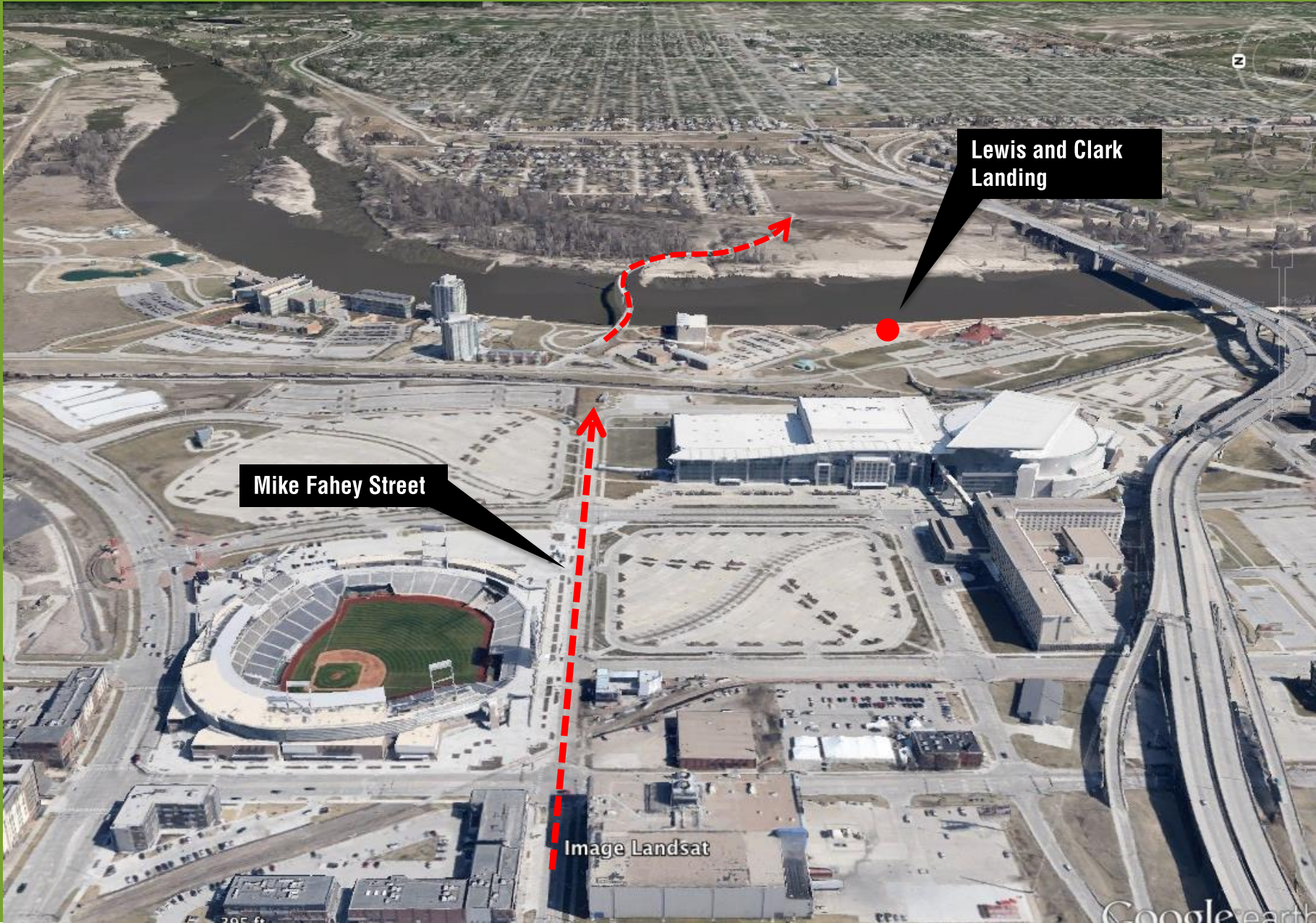




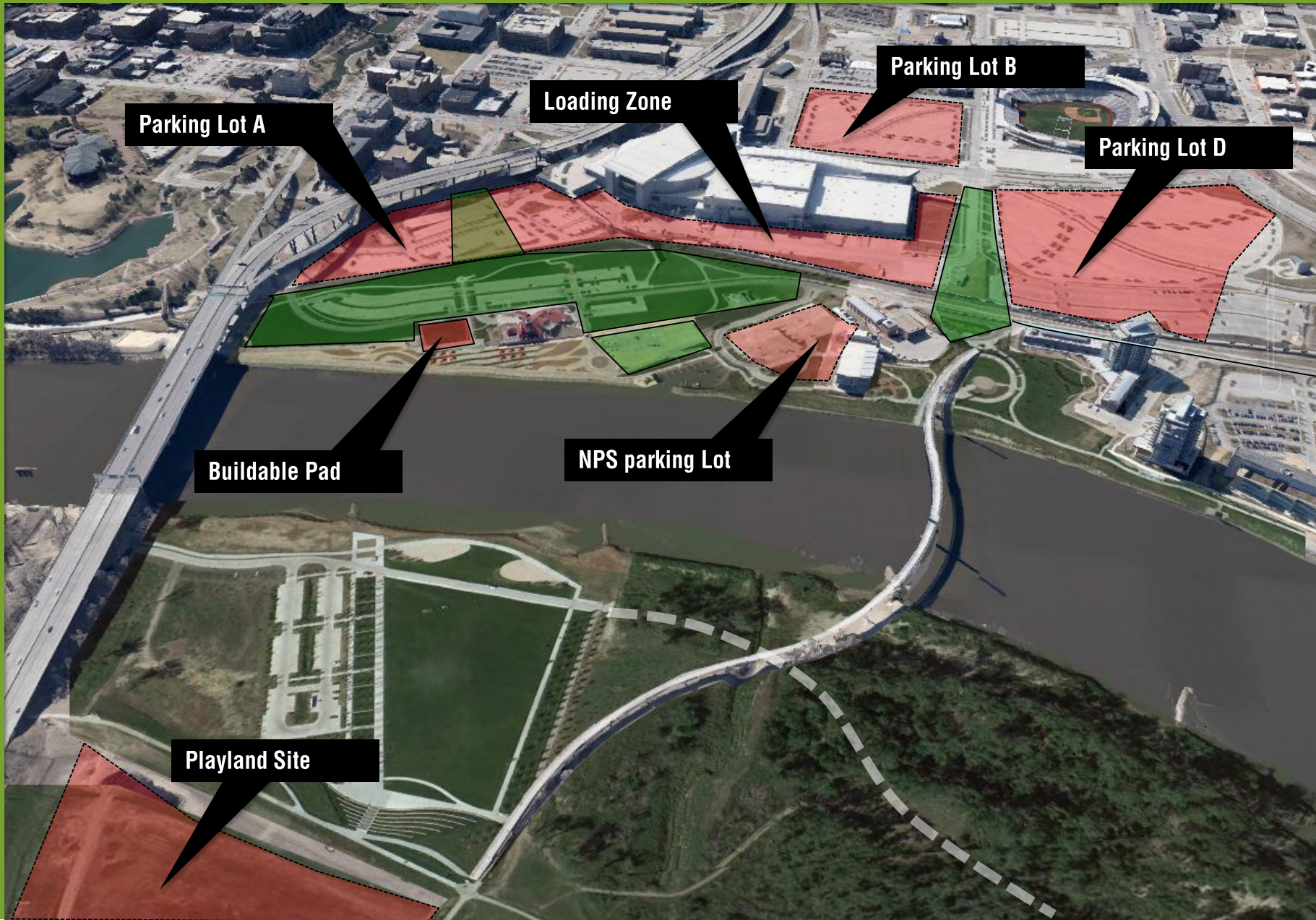
Parking Lot A

Lewis and Clark
Landing









Parking Lot A

Loading Zone

Parking Lot B

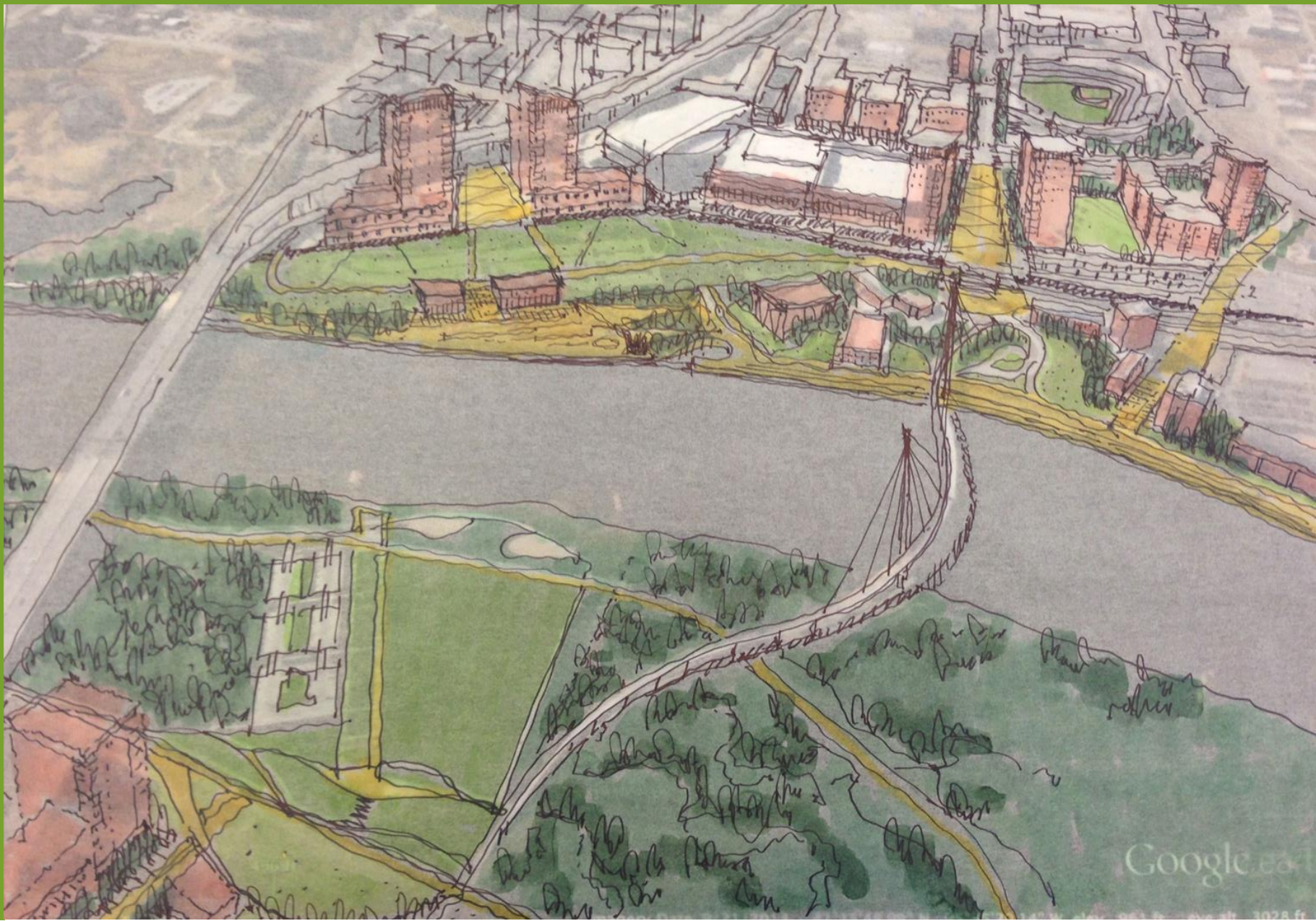
Parking Lot D

Buildable Pad

NPS parking Lot

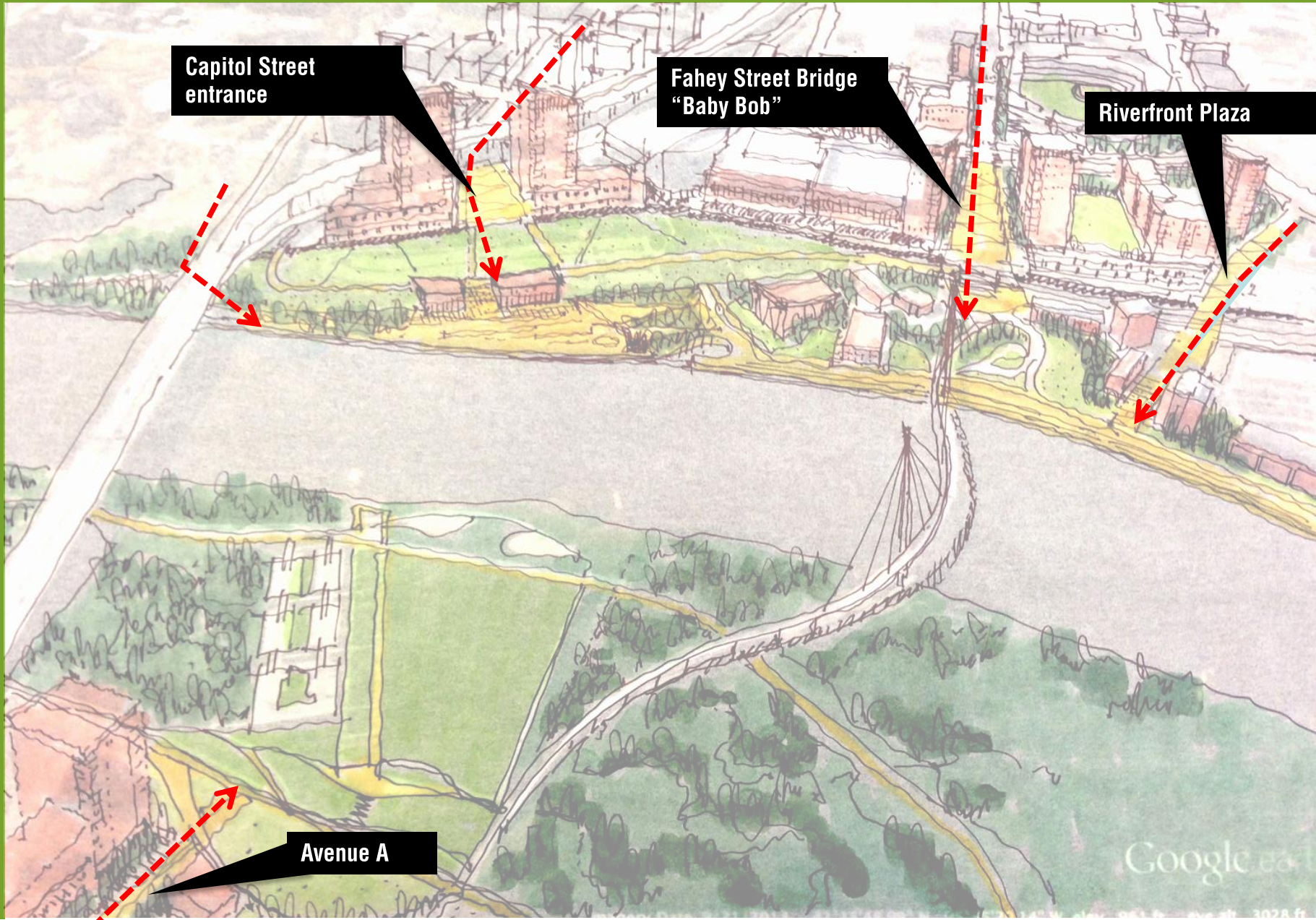
Playland Site





Google Earth

2028 ft

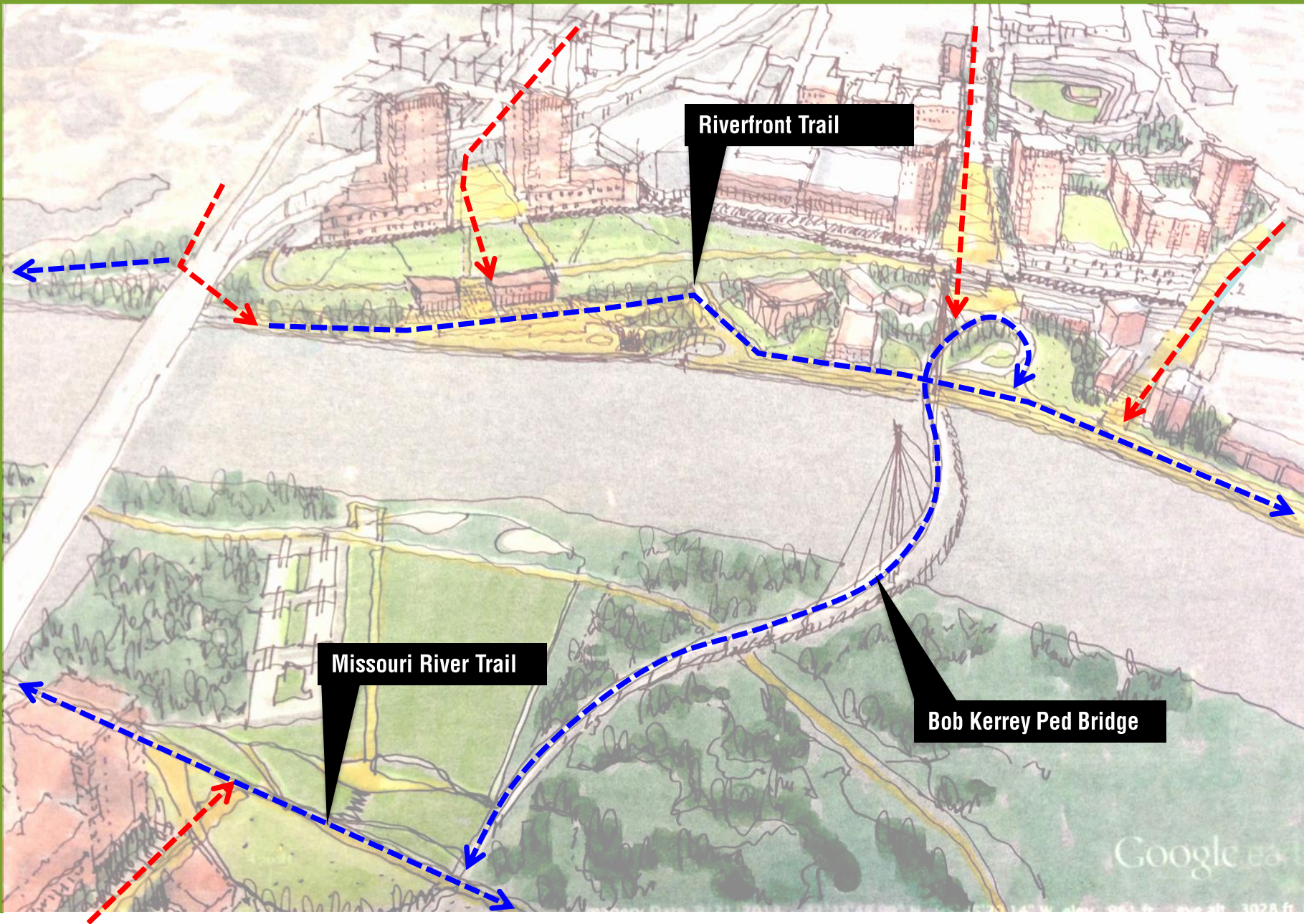


Capitol Street entrance

Fahey Street Bridge "Baby Bob"

Riverfront Plaza

Avenue A

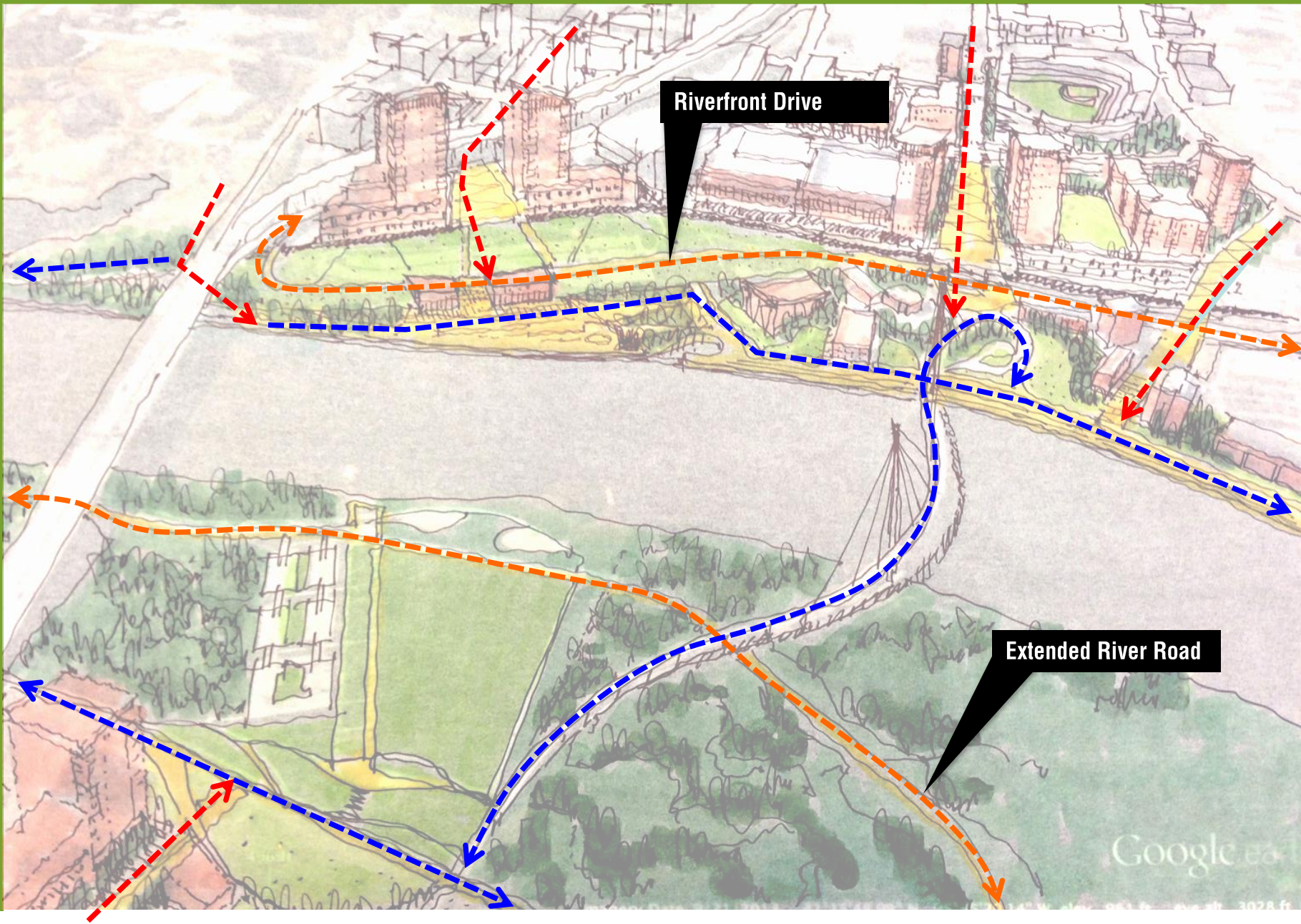


Riverfront Trail

Missouri River Trail

Bob Kerrey Ped Bridge

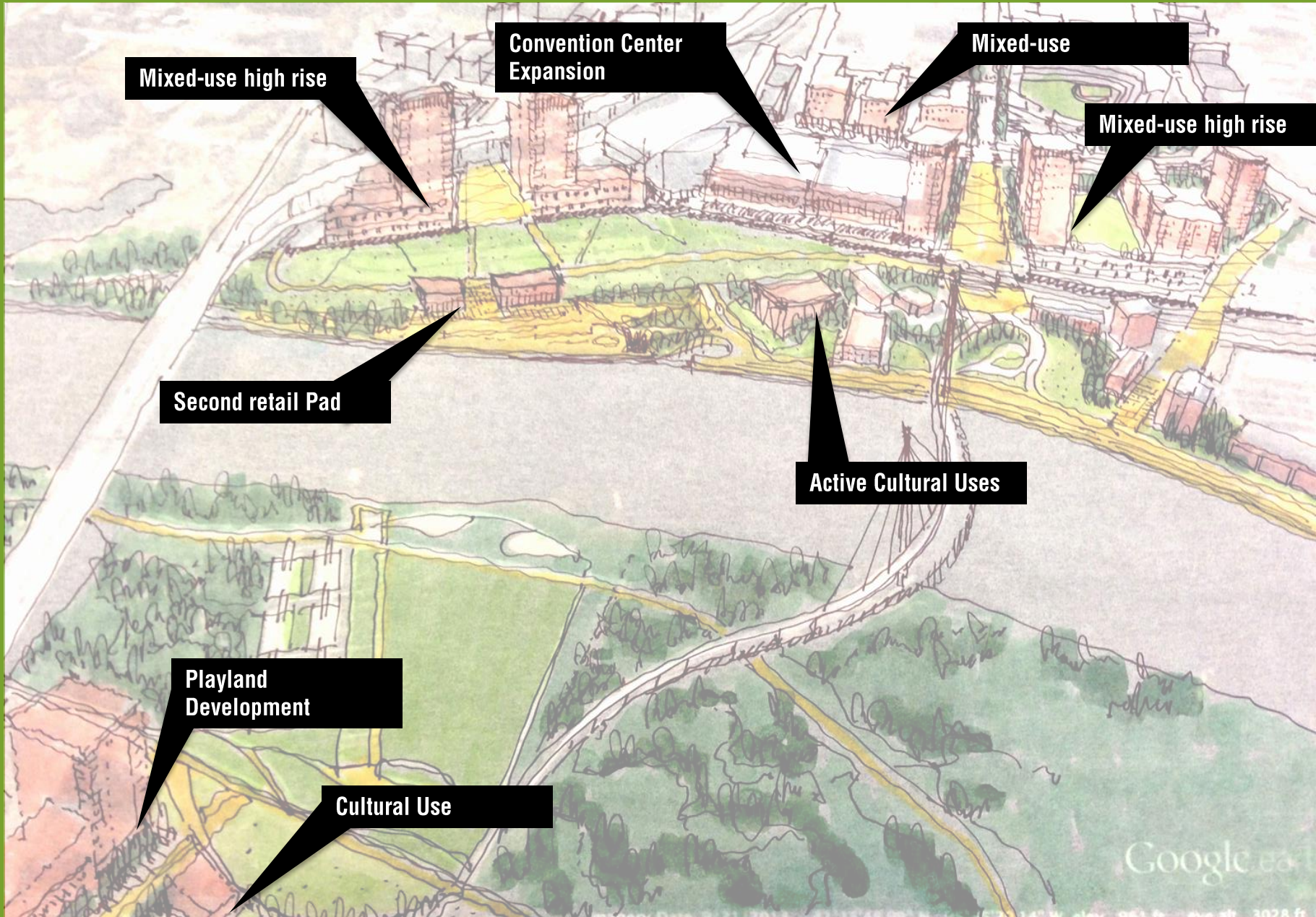
Google Earth



Riverfront Drive

Extended River Road

Google Earth



Mixed-use high rise

Convention Center Expansion

Mixed-use

Mixed-use high rise

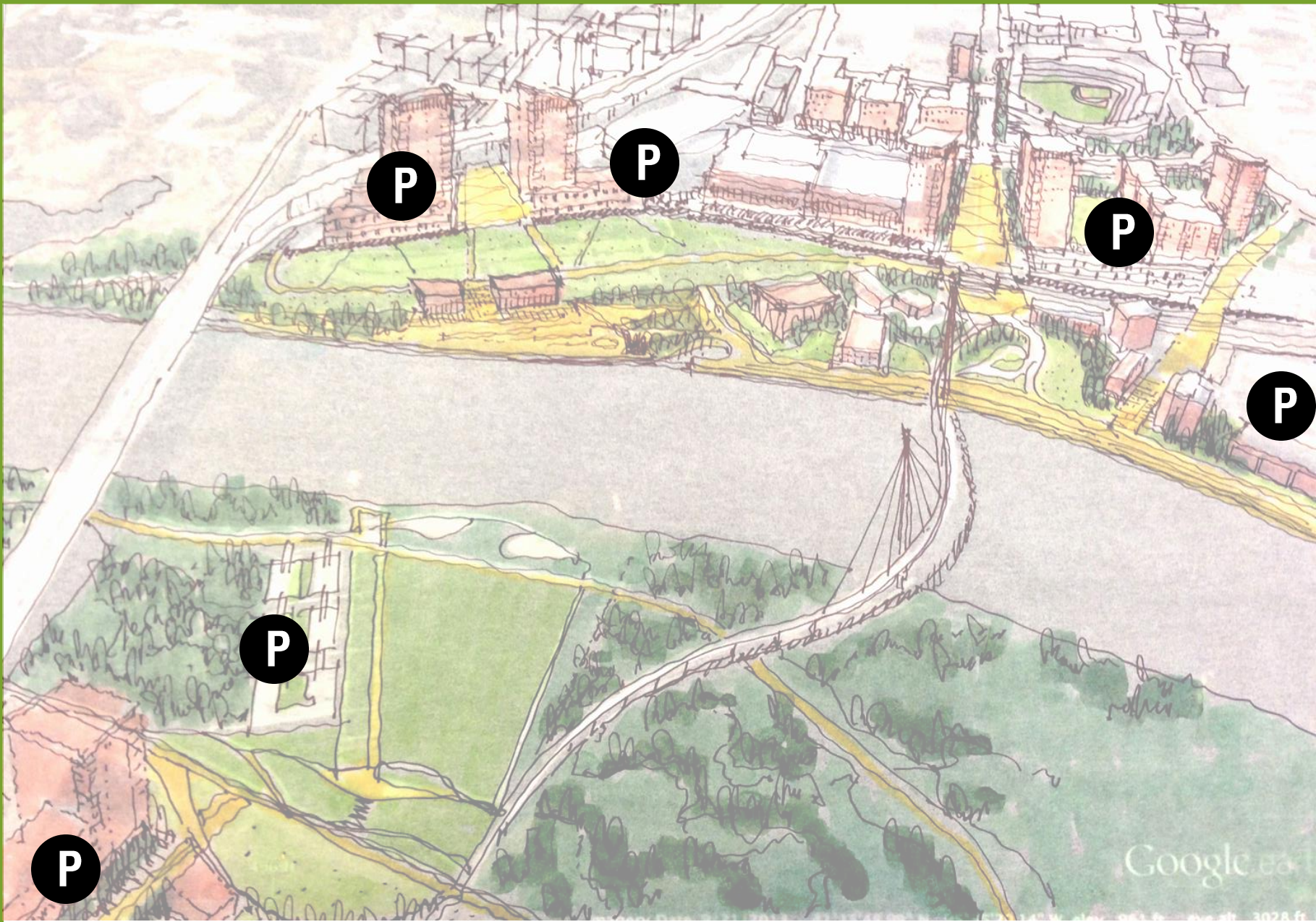
Second retail Pad

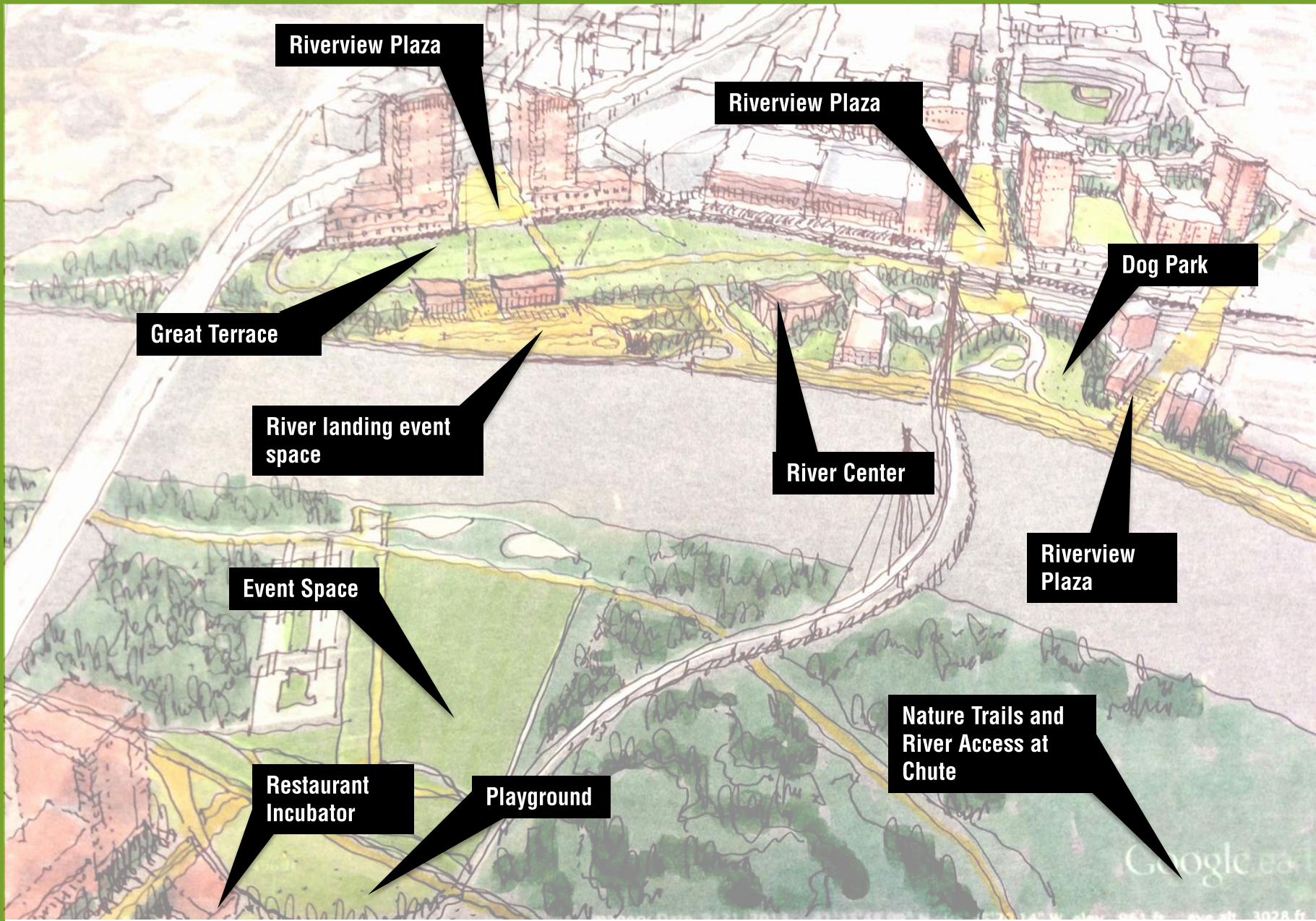
Active Cultural Uses

Playland Development

Cultural Use

Google Earth





Riverview Plaza

Riverview Plaza

Great Terrace

Dog Park

River landing event space

River Center

Event Space

Riverview Plaza

Restaurant Incubator

Playground

Nature Trails and River Access at Chute

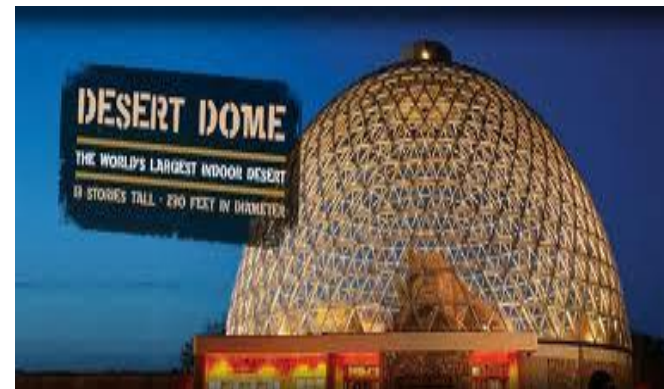
Google Earth



Missouri River Commons

Getting Started

- Density in addition to destination venues will help make Missouri River Commons a year round, every day place.
- Filling in the gaps between the large structures with connective tissue will strengthen venues large and small

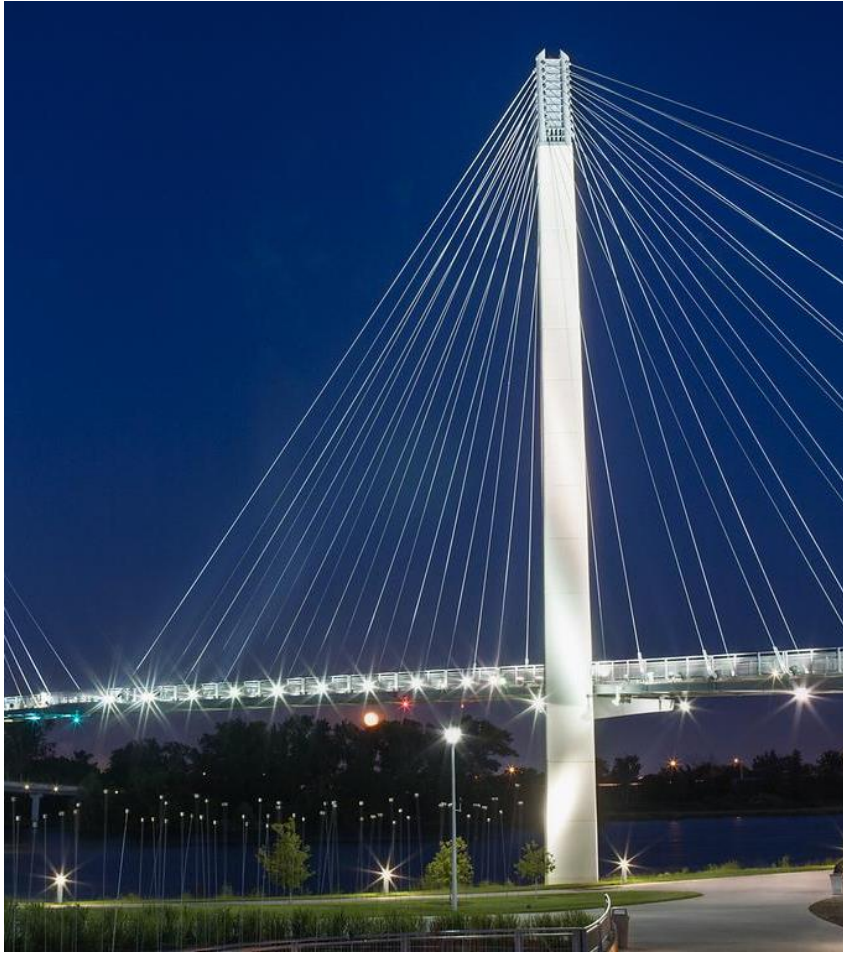


Getting Started

- More everyday activities will make the riverfront more alive, attract more people and ultimately attract more events.
- It doesn't need to be summer for outdoor play.



Getting Started



- Improving access and connectivity to the neighborhoods will increase eyes on the park.
- Will improve physical and social relationships

Getting Started

Tom Hanafan's Rivers Edge Park
MECA Taste of Omaha
Henry Doorly Zoo and Aquarium
Back to the River
Omaha Convention and Visitors Bureau Heistand Family Foundation
Lewis and Clark Landing
The Sherwood Foundation Miller's Landing
Bob Kerrey Pedestrian Bridge ConAgra Foods Gallup
Husch Blackwell City of Omaha
Heartland of America Park and Fountain
The Durham Museum CenturyLink Center
Iowa West Foundation
TD Ameritrade Park
City of Council Bluffs Allen & Company
Greater Omaha Chamber of Commerce
Council Bluffs Chamber of Commerce

Getting Started



- Engage everyone
- Don't wait!
- Meet early and often
- Focused and ongoing organizational infrastructure
- Implement

Final Thoughts

Stewardship

- Focused
- Ongoing

Roles

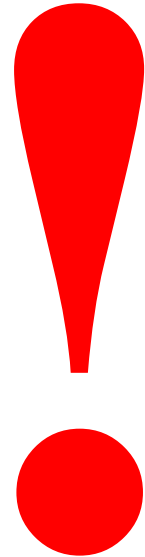
- Facilitation / collaboration
- Joint venturing
- Planning
- Funding



Final Thoughts

The time is now

- Pedestrian Bridge
- Cooperative Mayors
- Economic Development Partnership
- CVBs



WE DON'T COAST™

It's time to tell the world.



QUESTIONS?