



City of Grand Island

Tuesday, March 13, 2018

Council Session

Item C-1

Presentation of Veteran's Legacy Project Master Plan Phase 1 and 2

Council action will take place under Resolutions item I-3.

Staff Contact: Mayor Jeremy Jensen

Council Agenda Memo

From: Marlan Ferguson, City Administrator
Meeting: March 13, 2018
Subject: Veterans Legacy Project Master Plan
Presenter(s): Marlan Ferguson, City Administrator

Background

In 2016, the State of Nebraska conveyed to the City of Grand Island various tracts of real estate that were a part of the Central Nebraska Veterans Home. The property conveyed includes tracts north of Nebraska Highway 2 between Broadwell Avenue and Webb Road and South of Highway 281 as well as the agricultural lands south of Highway 2 and north of Capital Avenue. The City issued an RFP seeking proposals from a qualified consulting firm to assist in the development of a reuse plan for these lands. Olsson Associates was the chosen firm to assist in the development of the plan.

Discussion

The City of Grand Island, Nebraska has the opportunity to re-imagine what the Central Nebraska Veterans Home and surrounding 640 acres may become in the future. As such, Olsson Associates, Inc. and their partner Ochsner Hare and Hare underwent a master planning process, guided by input from project stakeholders, City staff members, and residents of Grand Island. This document details that master planning process, the basis for the master plan's recommendations, and the master plan itself. The plan is not a static document. While it was compiled as a reflection of existing conditions and stakeholders' and the public's interests at the time, the plan will have important implications for future site redevelopment, growth, and development projects. The resolution reflects the adoption of the Master Plan.

Alternatives

It appears that the Council has the following alternatives concerning the issue at hand. The Council may:

1. Adopt the Resolution authorizing the agreement with Olsson Associates, Inc.
2. Refer the issue to a Committee
3. Postpone the issue to future date
4. Take no action on the issue

Recommendation

City Administration recommends that the Council adopt the Resolution.

Sample Motion

Move to approve the resolution authorizing the Adoption of the Veterans Legacy Project Master Plan for the former Central Nebraska Veterans Home in Grand Island.



**VETERAN'S
LEGACY PROJECT**
MASTER PLAN

Embracing, Creating, and Preserving the Legacy of Heroes

March 13, 2018

Acknowledgments

A special thank you goes to everyone who participated in the planning process for the Veteran’s Legacy Project Master Plan. This plan was made possible by the contributions and insights of the residents, business persons, property owners, and representatives from various community groups and organizations.

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Consultant Team



with assistance from
Canyon Research Southwest, Inc.

Prompted by the relocation of the Central Nebraska Veterans Home, the City of Grand Island, Nebraska has the opportunity to re-imagine what the Central Nebraska Veterans Home and surrounding 640 acres may become in the future. As such, the land underwent a master planning process, guided by input from project stakeholders, City staff members, and residents of Grand Island.

This document details that master planning process, the basis for the master plan's recommendations, and the master plan itself.

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1.0

Introduction and History

Past, Present, and Future

The Grand Island Veterans Home, originally known as the Nebraska Soldiers and Sailors Home, opened in 1887. It was the first veterans' home in the State. Legislative Bill 247, passed on March 4, 1887, stipulated that not less than 640 acres be donated for the site of the Soldiers and Sailors Home. The chosen site was originally three miles north of Grand Island, bounded by Highway 281/Airport Road to the north, Broadwell Avenue to the east, Capital Avenue to the south, and Webb Road to the west.

This land was conveyed to the State of Nebraska in two parcels. Of the 640 acres, approximately 30 acres have been used to house veterans and their spouses over the past decades. The rest of the land has historically been used for agricultural and recreational uses.

The Home was originally established to house only Civil War veterans of the Union Army, but it was later decided that Confederate Army veterans were also allowed to reside in the Home. Subsequent laws were passed to expand eligibility to veterans from all wars and conflicts. In 1969, the official name changed to the "Nebraska Veterans Home," to reflect all branches of service.

Since that time, additional soldiers' homes have been established throughout the State, including those in Milford, Norfolk, Scottsbluff, and Omaha. Funding was eventually pulled for the home in Milford.

Today, agricultural and recreational uses still comprise the large majority of the acreage. Veterans' uses continue at what is referred to now as the Central Nebraska Veterans Home. This veterans' campus consists of multiple buildings, all which have housed veterans and provided support services. Other related uses occupy the southern half of the property, including the Veterans Cemetery on the southwest corner and the United Veterans Club and Veterans Park on the southeast corner of the site.

Given the age and condition of the current facilities, the Nebraska Department of Administrative Services and Department of Health and Human Services (operator of the Central Nebraska Veterans Home) found that the current Central Nebraska Veterans Home fails to meet current building standards, and that its design fundamentally conflicts with best practices listed in the Department of Veterans' Affairs' Community Living Centers Design Guide (June 2011). Therefore, the State determined that a new home should be built to meet the current Community Living Centers standards.

From there, the State appointed a selection committee to receive proposals from Nebraska communities to locate the new home. Following proposal review, the committee recommended a new location in Kearney to the Governor. The Governor accepted the recommendation of the committee.

Following the design process, the State sought construction bids for the new home. The new Central Nebraska Veterans Home is scheduled to open in the fall of 2018. Once opened, all veterans currently residing in the Grand Island home will transition to the Kearney home.

Site Conveyance

Given the fact that (1) the State currently owns and operates the Central Nebraska Veterans Home and surrounding 640 acres and (2) the campus holds historical and sentimental value, specifically to those residing in Grand Island, the State and the City of Grand Island entered into an agreement. Upon completion of the new Kearney home, the State intends to convey the Grand Island real estate (including the Veterans Home campus, Veterans Cemetery, and parking area leased to the United Veterans Club) and the agricultural and recreational lands currently leased to the City to the City.

The conveyance will happen in two phases:

- **Phase 1** - Agricultural land, Eagle Scout Park, and Veterans Sport Complex
- **Phase 2** - Land and building currently holding the Central Nebraska Veterans Home and Veterans Cemetery



Excerpt from Legislative Bill 247 *(passed on March 4, 1887)*

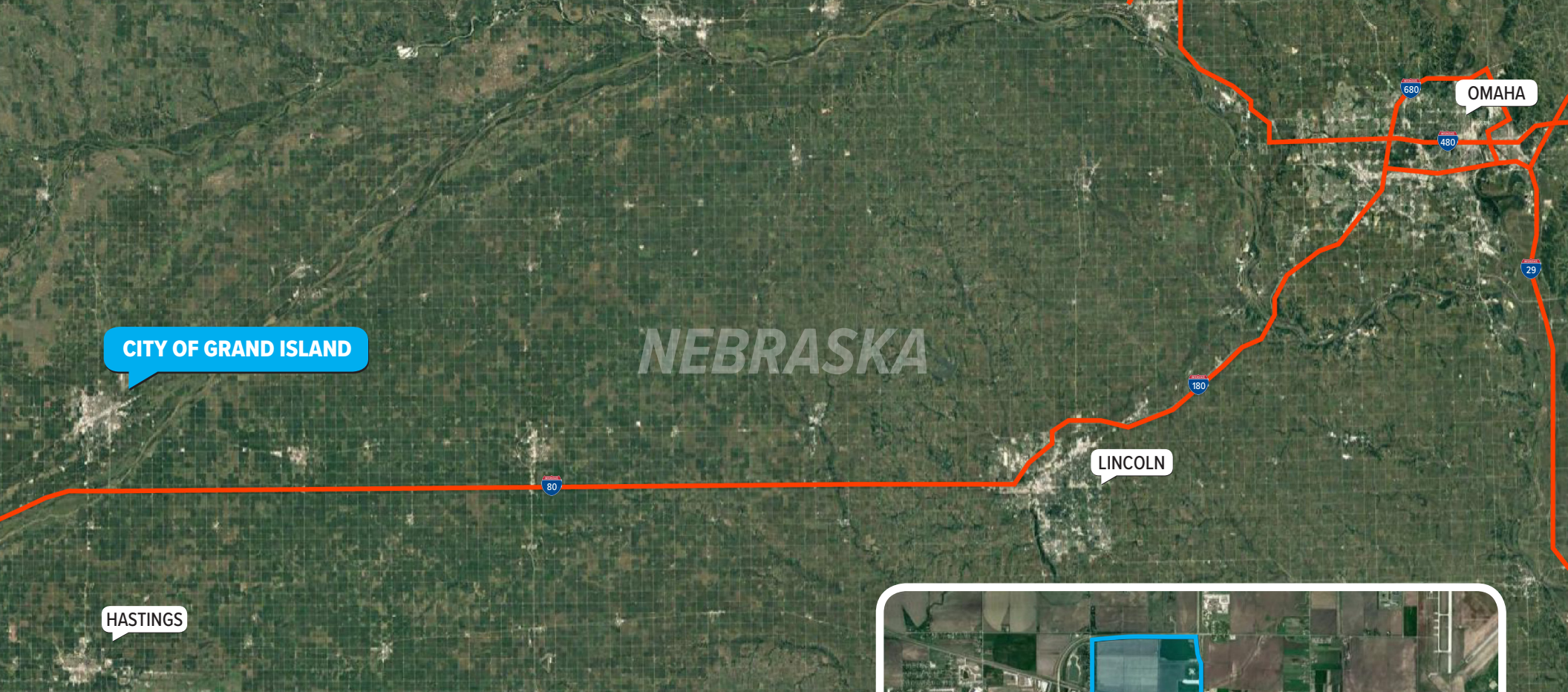
WHEREAS, There are many old soldiers in Nebraska who, from wounds or disabilities received while in the union army during the rebellion, are in the county poorhouses of this state; therefore be it

RESOLVED, That it is the sense of this Senate that a suitable building be erected and grounds provided for the care and comfort of the old soldiers of Nebraska in their declining years;

RESOLVED, That a committee of five be appointed to confer with a committee of the House on indigent soldiers and marines to take such actions as will look to the establishment of a State Soldiers' Home.

Image Credit: Nebraska Department of Health and Human Services
Sailors' and Soldiers' Home in 1905 (Full Page)
Sailors' and Soldiers' Home Administration Building Postcard (Small Left)
Sailors' and Soldiers' Home Postcard (Small Right)





Regional Setting

The City of Grand Island is located in central Nebraska, approximately 100 miles west of Lincoln, Nebraska and 140 miles southwest of Omaha, Nebraska. The community sits north of Interstate 80, is bisected diagonally by U.S. Route 30, and divided vertically by U.S. Route 281. Grand Island is often considered a hub of activity for central Nebraska, and specifically within its metropolitan statistical area (MSA). The MSA includes the counties of Hall, Hamilton, Howard, and Merrick.

Project Boundary

The project site is located on the very northern edge of Grand Island. In fact, City limits divides the site. As previously mentioned, the site is bounded by Highway 281/Airport Road to the north, Broadwell Avenue to the east, Capital Avenue to the south, and Webb Road to the west. The site is bisected diagonally by Old Highway 2 and the parallel BNSF railroad.



Grand Island, Nebraska

Purpose of the Plan

Given the size, importance, and current uses across all 640 acres, the City of Grand Island desired to develop a master plan for the revitalization and development of the former Central Nebraska Veterans Home land. This exciting time is building upon a collection of real assets within the project area, including the historic buildings, the veterans' legacy, and community recreational uses.

It is important to note that no changes will be proposed to the Veterans Cemetery and United Veterans Club properties.

This plan will be the City's official policy guide for the redevelopment and development of the project area, developed through the joint effort of City staff members, stakeholders, and members of the public. The plan presents a community vision for the future of the project area, outlining land uses, development opportunities, and circulation patterns to achieve that vision. It also defines the steps to ensure future success.

At its foundation, the plan acts as a uniting effort to create a single direction for the project area, based on public engagement, site analysis, market realities, and extensive research. The plan sets expectations, communicating to the development community the preferred types of uses and character.

The Planning Process

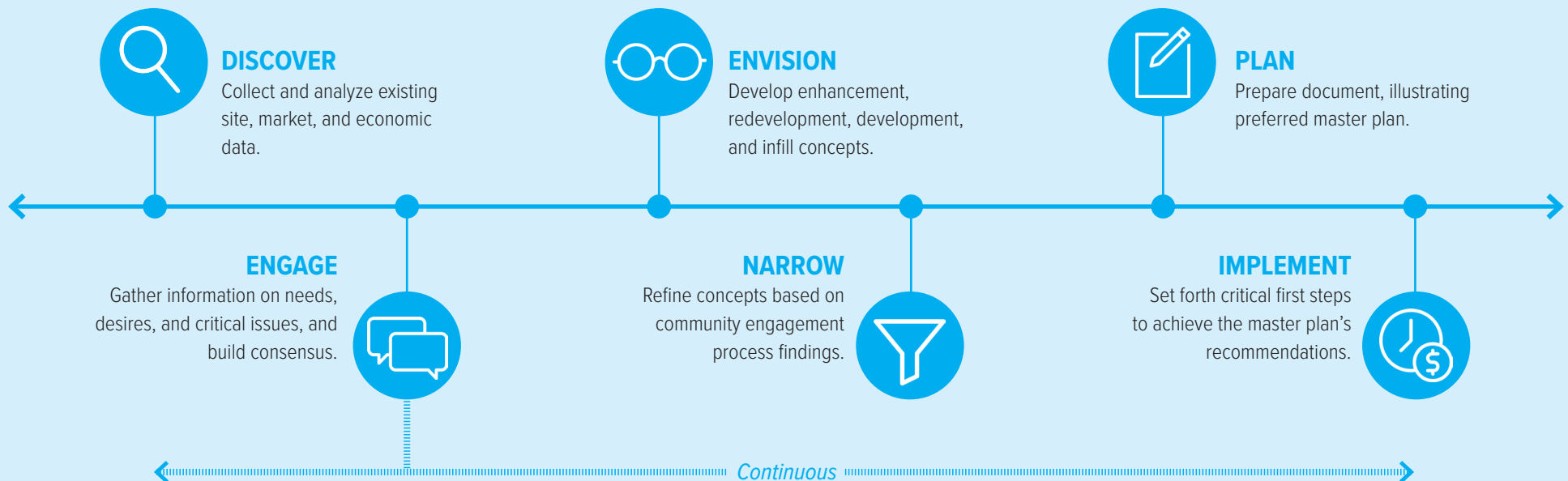
The planning process largely took place in 2017. The project team identified a six step process for development of the plan, including:

- Step 1: **Discover**
- Step 2: **Engage**
- Step 3: **Envision**
- Step 4: **Narrow**
- Step 5: **Plan**
- Step 6: **Implement**

The graphic below details this planning process, though it is important to understand that the planning process is not necessarily linear. It is infused with flexibility to be able to react to new information and changing circumstances. In general, each step builds on the one prior.

Public and stakeholder engagement was a core element of the plan's development. After the initial launch of the planning process, outreach events and tools were used throughout the planning process, including a project website, the City's social media accounts, in-person stakeholder sessions, and a public open house.

The Planning Process



Using and Maintaining the Plan

It is important to note that the plan is not a static document. While it was compiled as a reflection of existing conditions and stakeholders' and the public's interests at the time, the plan will have important implications for future site redevelopment, growth, and development projects.

If attitudes or economic and demographic conditions change, the plan must be revisited to ensure its continued relevance and usability. By reviewing the plan, and the context in which it was written, the project area's future success will continue to be in line with current stakeholder and public aspirations.

Reviewing the plan may be simplified by making it available online or in a public gathering place, such as the Grand Island Public Library, and by providing assistance to community members in understanding various aspects of the document. Issues with the plan as it is written may arise through these fluid review processes, ensuring that the plan is a "living" document.



Image Credit: City of Grand Island, NE
Veterans Athletic Complex Master Plan (Left)
Veterans Cemetery Master Plan (Right)

Existing Plans and Studies

There are multiple plans, studies, and regulations adopted by the City of Grand Island that have influenced development and growth in and around the project area. This section contains a brief summary of each, along with any findings important to the project area.

Veterans Athletic Complex Master Plan

The original Veterans Athletic Complex Master Plan (VACMP) began with the construction of four ballfields and parking. The second phase of the VACMP was approved by the City in April of 2017 and is now under construction. It includes six new softball fields, concessions and restrooms, additional parking, a park, and a splash pad. This plan fully integrates the VACMP and proposes expanding VACMP to include six large soccer fields, four futsal fields, a playground, and a fieldhouse.

Veterans Cemetery Master Plan

A Veterans Cemetery Master Plan (VCMP) was completed in 2016 to address the nearing capacity of the Grand Island Public Cemetery. This plan does not propose any changes to the Veterans Cemetery, but fully integrates the VCMP. As part of the VCMP, the City agreed to maintain the existing Veterans Cemetery and provide a buffer from surrounding land uses.

Community Housing Study with Strategies for Affordable Housing

A Community Housing Study was completed in 2014 to identify a housing profile and demand analysis for the City. The Study describes a Housing Action Plan, which identifies recommended housing projects and activities. This Study follows previous studies conducted in 1982, 2006, and 2009. The implementation period for this study is from July 2014 to July 2019.

While the Study does not specifically describe necessary residential development on the project site, it does include an exhibit from the City's current Comprehensive Plan. This exhibit shows approximately half of the project area (largely the western half) as an area for potential housing development.

Comprehensive Development Plan

The Comprehensive Development Plan (CDP) states that the majority of the project area should be developed as a public use (e.g., city offices, libraries, colleges, universities, fire stations, hospitals, etc.). This category is inherently flexible. Eagle Scout Lake and the surrounding park is designated for parks and recreational uses, noting that this area is environmentally sensitive. In addition, the CDP recommends a larger setback and higher landscaping enhancements along Highway 281 (Airport Road), as it serves as an entrance to Grand Island. Finally, the CDP sets forth a objective to preserve historic buildings, such as those within the Veterans Home campus.



2.0

Market and Site Conditions

The process of developing a master plan of this nature requires much thought and analysis of the project area's existing state and context. With this information, well-informed recommendations and implementation strategies that properly respond to current realities can be produced.

To achieve the necessary level of understanding, the planning team collected all relevant information and data, as it pertained to the existing conditions of the project area. Said information was collected from, but not limited to, the following resources:

- Site visits by the planning team
- Google Earth Pro and Google Maps
- City-provided GIS data
- City of Grand Island website (www.grand-island.com)
- The Grand Island Independent (www.theindependent.com)
- U.S. Census Bureau
- Esri Business Analyst
- U.S. Bureau of Labor Statistics
- Natural Resources Conservation Service (NRCS) Web Soil Survey

The **Market and Site Conditions** section serves as a baseline for recommendations provided in the Veteran's Legacy Project Master Plan.

*Note that the following section, **Engagement Process**, details additional information the planning team used during the creation of the master plan. Section 2.0 and 3.0 should be reviewed and weighed equally.*



Market Feasibility Study Findings

Canyon Research Southwest prepared a Market Feasibility Study that evaluated the market potential and redevelopment opportunities for all 640 acres of the project area. The following pages summarize the study findings and recommendations. The full Market Feasibility Study is provided as an appendix.

Economic and Demographic Indicators

A community's changing population, household types, age composition, educational attainment, and income levels impact the local housing and commercial real estate markets. Quantifying these characteristics help project future demand for commercial space and housing. To begin, the Grand Island metropolitan statistical area (MSA), which includes Howard, Merrick, Hall, and Hamilton Counties, was analyzed.

General findings for the MSA include:

- Changing population demographics, a growing senior population, and an above average share of households earning less than \$25,000 annually suggests a rising demand for affordable rental and for-sale housing and senior housing.
- The growth in move-up and luxury housing will be modest.
- The region's below average educational levels constrain attainable incomes, housing values, homeownership levels, and demand for commercial space.
- Job loss over the past decade constrains commercial and industrial space demand.
- The local economy is dominated by manufacturing, retail trade, and healthcare jobs with below average levels of professional jobs in finance, insurance, real estate, technical, and management fields.

Population Growth Trends

Population growth is a key component for generating continued demand for retail space as well as for-sale and rental housing.

Since 1990, the Grand Island MSA has experienced steady population growth. From 1990 to 2010 the metro population increased by 13.8 percent to 81,850 residents. The current population of the Grand Island MSA is 86,970, up 6.3 percent since 2010. By 2030 the population is projected to increase by 10.7 percent to 96,273 residents.

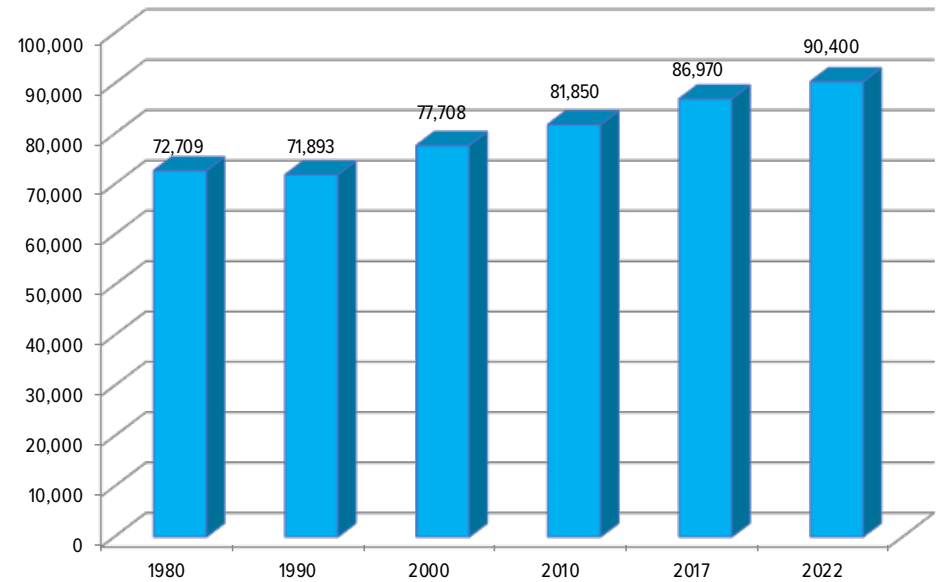
This population base is sufficient to support a diverse retail market with continued population growth fueling additional demand for retail goods and services, commercial space, and new residential housing units.

Household Composition

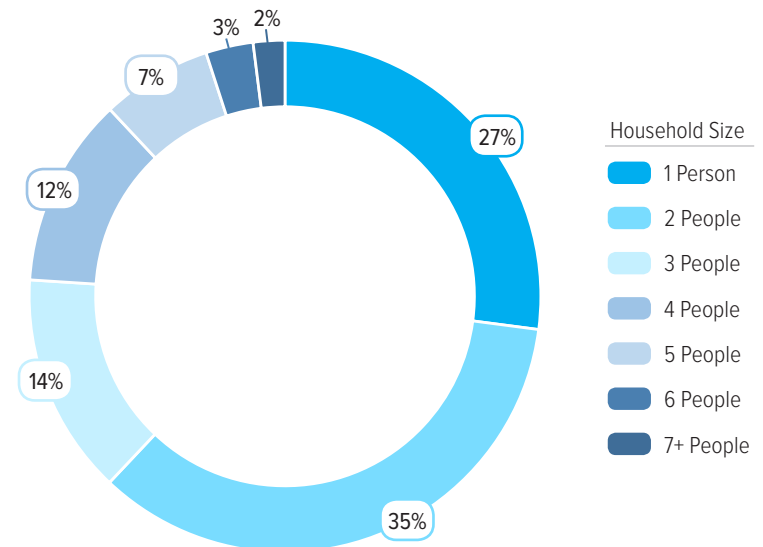
Household formation and the mix of household types have a direct impact on the composition of retail sales and housing types. According to the U.S. Census Bureau, during 2010 a reported 31,535 households resided in the Grand Island MSA with an average household size of 2.57 persons. Households with one person accounted for 27.1 percent of all households with 33.8 percent of households having children present. Married couple families accounted for 52.3 percent of all households, of which 23.1 percent had related children.

These market area household composition characteristics would suggest a propensity for detached single family housing and above average retail expenditures for household furnishings, groceries, clothing and accessories, sporting goods, books, and other family-related goods and services.

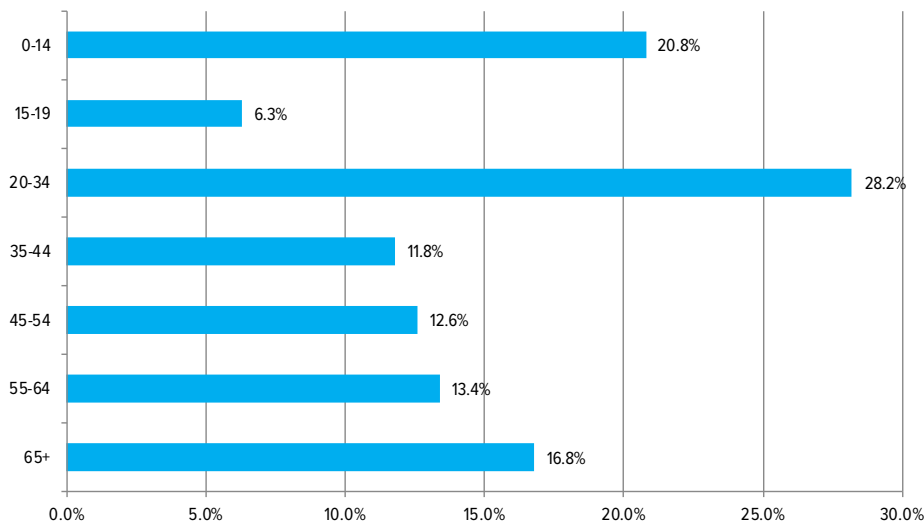
MSA Population Growth Trends



MSA Household Size Composition



MSA Population by Age



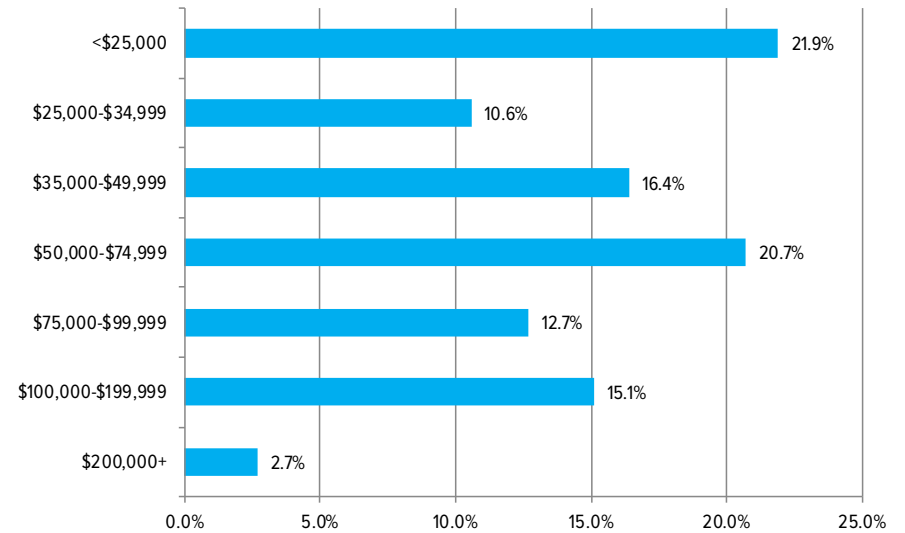
Population Age Distribution

Age is unquestionably an important factor in consumer identity, since consumption patterns and financial situation change significantly throughout an individual's lifetime. Change in the relative proportions of age groups in the Grand Island MSA is expected to have an important impact on the retailing and housing industries.

From 2017 through 2022, the Grand Island MSA population is forecast to grow by 3.9 percent, adding 3,430 new residents. Over the five-year time frame the number of young adults age 20 to 34 years is forecast to decline by 179 residents with the empty nester population declining by 459 residents. Absolute population gains are forecast to be the largest for the elderly (2,433 residents), children (638 residents), and family/working adults (629 residents).

These shifts in the age of the market area population will impact the future demand for retail goods, personal services, and housing.

MSA Households by Income



Household Income Distribution

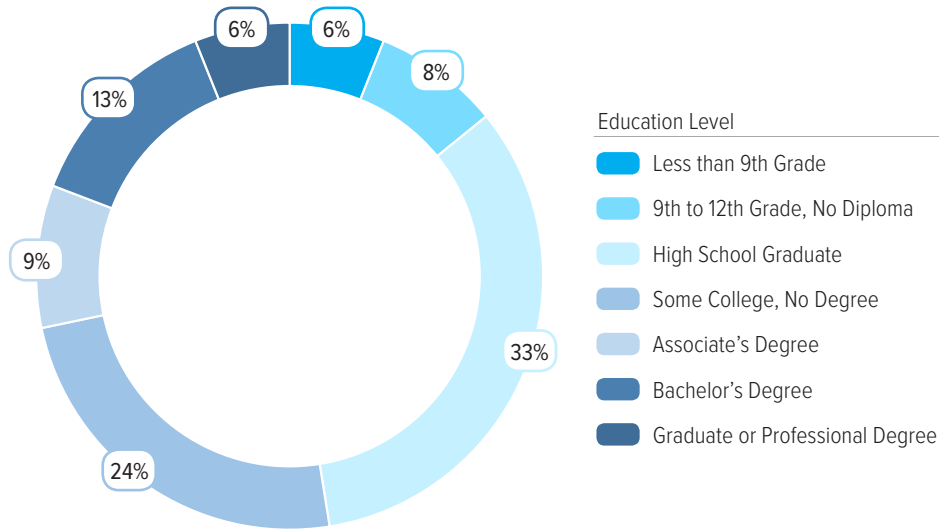
A market area's purchasing power is a function of consumer population and income levels. As a market area's incomes rise the more retail expenditures are supported.

The current median household income for the Grand Island MSA of \$66,245 exceeds both \$55,391 for Nebraska and \$55,775 for the United States. From 2017 to 2022 the forecast growth in Grand Island's median household income of 9.4 percent is expected to lag behind that of 14.5 percent for Nebraska as a whole. By 2022, the median household income for Grand Island and Nebraska are forecast to be similar.

High-income households with incomes of \$100,000 or more account for 15.8 percent of all households in the Grand Island MSA, compared to 23.3 percent of Nebraska households.

These high income households represent potential demand for luxury housing and the ability to support above average retail expenditures on such consumer items as food, personal services, apparel, household furnishings, entertainment, automobiles, and healthcare.

MSA Educational Attainment



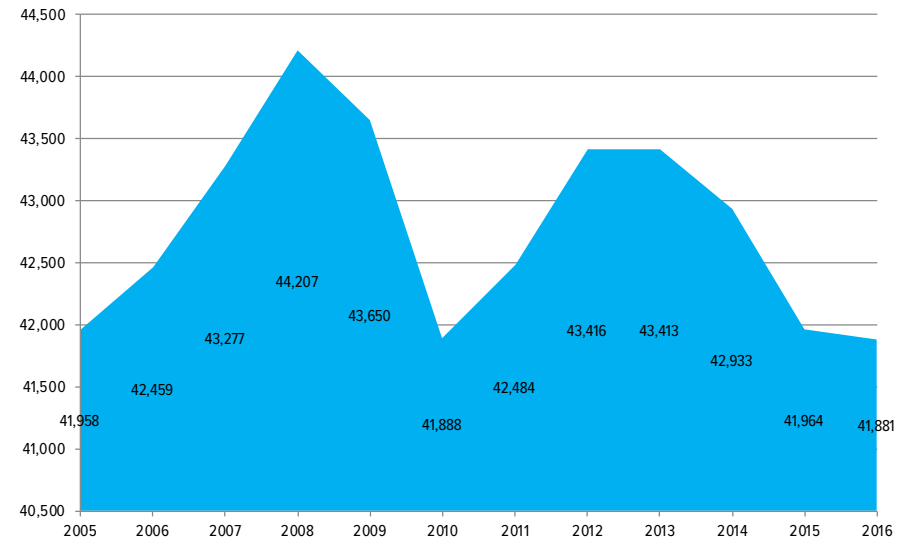
Educational Attainment

Higher educational levels for a market area population generally translate to higher income levels and retail expenditures. The demand for office space improves at higher educational attainment levels as more residents are more likely to be employed in professional service and medical professions.

When compared to the statewide average the Grand Island MSA population is less educated. To elaborate, 32.7 percent of Grand Island MSA residents age 25 years and over, a high school degree or GED is the highest level of educational attainment, compared to 26.7 percent for the State of Nebraska. A reported 20.0 percent of residents within the Grand Island MSA have attained a bachelor's or advanced degrees, compared to 30.6 percent statewide and 30.0 percent nationally.

The Grand Island MSA's below average educational attainment levels translate into lower than average wages, reduced retail expenditures, and below average spending on personal services, apparel, household furnishings, entertainment, automobiles, and healthcare. The educational attainment levels limit the demand for professional office space.

MSA Employment Growth



Employment Trends

Since gains in employment generally fuels growth in population, income, and retail expenditures, job growth is a reliable indicator of general economic conditions and demand for housing and commercial space.

After peaking in 2008, total employment in the Grand Island MSA declined during 2009 and 2010 in response to the national recession. Job growth rebounded from 2011 to 2013 but failed to match the pre-recession levels. Job loss resumed in 2014 and by 2016 total employment was at its lowest level since 2005. Stagnant or declining employment levels adversely impacts commercial and industrial space absorption.

Compared to the statewide employment composition, Hall County supports an above average share of construction, manufacturing, retail trade, and transportation and warehousing. Sectors that Hall County lags include finance, insurance, and real estate; professional, scientific, and technical services; management, administrative, and support services; and educational services.



Image Credit: Weber State Athletics

Athletic Facilities Market

The City of Grand Island operates the Veterans Athletic Complex within the northeast quadrant of the project area. The park features four baseball fields, three adult soccer fields, concessions, restrooms, and parking. Future expansion plans for the park call for the construction of additional baseball / softball, soccer fields, a splash pad, and futsal fields.

The Grand Island Parks and Recreation Department collectively operates 18 baseball / softball fields and four soccer fields. Based on standards published by the National Recreation and Park Association, Grand Island is under-supplied by five soccer fields with the supply-demand balance for baseball fields at equilibrium. The shortage of local soccer fields suggests the Veterans Athletic Complex can easily support the construction of additional soccer fields. While the national standards indicate no demand for additional baseball fields currently exists in Grand Island, the six planned new fields will enable the Veterans Athletic Complex to host local and regional baseball and softball tournaments, thus servicing an expanded geographic trade area. Therefore, the findings of this study conclude that sufficient demand exists to warrant the construction of additional ball and soccer fields within the Veterans Athletic Complex.



Image Credit: Sharky's Woodfired Mexican Grill

Competitive Retail Market

The project area is not located within one of Grand Island's existing commercial corridors. The Highway 281 corridor is positioned approximately one-quarter mile to the west and hosts several large-scale shopping centers occupied by prominent national retailers such as Walmart, Sam's Club, Dillard's, JC Penney, Sears, Best Buy, Kohl's, TJ Maxx, and Home Depot.

Grand Island serves as a regional shopping destination that supports well above average retail sales volumes. Throughout the past five fiscal years sales tax receipts collected by the City of Grand Island have increased by 12.6 percent. By fiscal year 2015-16 taxable receipts reached \$16.4 million, equating to taxable retail sales of approximately \$1.1 billion. Grand Island's pull factor is estimated at 2.02, translating into a retail sales capture at a rate equivalent to twice that of the statewide average. This pull factor suggests that Grand Island attracts half its customers and retail sales from outside City boundaries.

Despite a retail sales surplus, the Grand Island MSA is capable of supporting additional retail sales for several retail categories, including furniture; grocery stores; beer, wine, and liquor stores; health and personal care stores; jewelry and luggage stores; books and music stores; and food services and drinking places. Again, Grand Island's strong retail pull factor yields well above average retail sales volumes and the potential to support additional retail sales.

The Grand Island MSA trade area possesses a retail sales surplus of \$210 million, suggesting the inability to support additional new retail space supply. By 2030, despite a forecast growth in annual retail sales of over \$175 million, a continued retail surplus will restrict the ability to feasibly support additional construction of new commercial space.

The site evaluation determined that the project area is not an appropriate location for future anchored shopping center development. While the property offers the necessary size, visibility, accessibility, exposure, and trade area demographics, site characteristics that hamper the property as a viable anchored shopping center site include the absence of a commercial corridor location and the lack of section-line corner development sites. Viable retail formats associated with the Veterans Athletic Complex, lake and opens space network, and business park campus may include food and beverage establishments and business services housed in small freestanding retail buildings or incorporated into multi-tenant office and commercial buildings.



Image Credit: Heartland Awning & Design



Image Credit: Grange Castle Business Park



Image Credit: Grange Castle Business Park

Employment-Related Market

Employment-related businesses operating in the Grand Island MSA include 399 professional services businesses, 185 health services businesses, and 563 industrial-based businesses, accounting for 28.9 percent of all businesses. Collectively, these 1,147 employment-related businesses support 18,934 jobs, or 38.2 percent of the MSA total. Leading professional businesses in the Grand Island MSA include real estate, insurance, and banks and lending institutions. Industrial-based businesses include transportation, wholesale trade, manufacturing, communications, and utilities.

When compared to the State of Kansas, the Grand Island MSA supports an above average concentration of banking, manufacturing, and transportation businesses. The higher dependence on manufacturing and transportation stems from Grand Island's central location and convenient access to highways, rail, and air service. Those business sectors where Grand Island supports a below average percentage of businesses include insurance, real estate, and healthcare.

Six industrial parks are currently being actively marketed in the Grand Island area to prospective businesses. Approximately 200 acres remains available for future development within the two actively developing industrial parks with the four undeveloped parcels of industrial land collectively possessing approximately 1,500 acres of raw land. From 2017 through 2030 the Grand Island MSA is projected to support the demand for approximately 68,000 to 140,000 square feet of professional office space; 167,400 to 186,000 square feet of medical office space; and 985,000 to 1.18 million square feet of industrial space.

Future employment-related redevelopment opportunities for the project area include a master planned business park designed to support a mix of professional office, medical office, technology, commercial, and recreational uses. Such development would distinguish itself from active industrial parks in Grand Island by providing a more upscale urban environment capable of attracting higher value-added businesses. Benefits of the property for such employment-related development include sufficient land area to accommodate master planning, adequate access and infrastructure, and the ability of on-site land uses to enhance the attractiveness of the property to businesses.



Image Credit: Pham Structural Engineering

Residential Housing Market

The Grand Island MSA housing stock totals 36,023 dwelling units operating at an overall occupancy rate of 92.1 percent. Of the total housing stock, owner-occupied units account for 61.2 percent with renter-occupied at 30.9 percent. The Grand Island MSA's housing stock is relatively old with nearly two-thirds of the existing inventory built prior to 1960. The oldest housing built prior to 1940 accounts for 20 percent of the MSA's total housing stock, or 6,340 dwelling units. Newer housing built since 2010 represents just 4.0 percent of the MSA's total inventory.

The Grand Island MSA supports a strong demand for both owner-occupied and rental affordable housing. Nearly 45 percent of owner-occupied units possess a monthly cost of just \$300 to \$799 with just 6.3 percent having a monthly cost of \$2,000 or more. The average monthly cost for owner-occupied housing in the Grand Island MSA is just \$788. Rental housing in the Grand Island MSA supports even a higher percentage of affordable housing. Over two-thirds of all rental housing has monthly housing costs of under \$800, with a median cost of just \$682.

From 2017 through 2030 the Grand Island MSA population is forecast to increase by 9,303 residents, creating demand for 3,620 new units. Given household income levels and existing housing stock, the housing demand is estimated to be 65 percent owner-occupied and 35 percent renter-occupied. The project area possesses the location and site characteristics to facilitate construction of single family subdivisions and/or apartment communities.

Business Development Factors

Interviews were conducted with several local economic development, government, and real estate professionals to gain an understanding of the assets and opportunities and constraints and limitations in fostering business development in Grand Island. The table to the right summarizes the content of those interviews.

Business Development Factors	
Assets and Opportunities	Constraints and Limitations
Grand Island is the largest urban area in central / west Nebraska	Less educated population with a below average percentage of educated professional
Grand Island supports a strong existing industrial base	Low wages creates high demand for affordable housing and social services
Close proximity to several major metropolitan areas / markets	40 percent of high school students reside in households where English is a second language
Availability of economic incentives to businesses	Blue collar perception
Availability of Tax Increment Financing to assist development projects	Lack of a four-year university
Sufficient utility capacity and competitive costs	A low unemployment rate places a constraint on the available workforce
Productive workforce and low wages	Old housing stock with a limited inventory of quality for-sale housing priced from \$150,000 to \$250,000
Affordable cost of living	
Convenient availability of healthcare services	
Convenient access to highways, rail, and airport	
Good school system	
Strong retail market supporting national and regional retailers	
Large inventory of available industrial land	
Low housing costs for both owner-occupied and rental housing	
50+ mile radius trade area for employment, business, and shopping	
Presence of Career Pathways Institute that educates high school students in trades	
High real property taxes	

Recommended Land Use Mix

The project area's large inventory of land, location at the edge of urban growth, utility infrastructure in place, and existing buildings and recreational facilities create a unique opportunity to promote comprehensive planning and mixed-use development. The priority of the master plan should be to foster economic development through attracting more value-added enterprises and jobs.

The project area offers the locational and site characteristics to accommodate mixed-use development. Based on the findings of the Market Feasibility Study, **prospective land uses include an athletic complex, business park campus, educational campus, limited retail, and recreation/open space.**

A goal of the master plan should be to create a major sports and recreation complex capable of catering to local and regional soccer, baseball and softball teams, and leagues and tournaments, serving as an economic engine. The expansion of the athletic and support facilities will enable the facility to support an expanded geographic trade area and promote economic development. As part of the expansion plans, the existing lake should be enlarged and a trail network incorporated. These improvements will both enhance Grand Island's quality of life and create a unique setting for establishing employment-related uses on the property.

An opportunity exists to create a unique business park campus environment that elevates what currently exists in the market. The most suitable location for a business park campus is at the northwest quadrant of the project area, providing sufficient parcel size, adequate visibility, and convenient highway access. Expansion of the existing lake and trail network into the business park campus site will create a unique setting for employment-based development currently not available in the Grand Island MSA. Prospective tenants include professional office, medical office, light industrial, and limited retail businesses.

A possible goal of the master plan is to create an opportunity to link on-site educational training with employers and jobs. The benefits would include improving the workforce, retaining residents, and attracting new businesses. Attracting a four-year university campus onto the property may not be viable, but a small annex campus specializing on trades and next generation professions may be. The Career Pathways Institute trains high school students in a variety of trades and is an excellent example of the type of educational facility that could be expanded on at the property. An appropriate location for an educational campus would be along the north side of Capital Avenue immediately east of the Veterans Cemetery. Adaptive reuse of some of the existing buildings should also be evaluated.

The Market Feasibility Study determined that the project area is not an appropriate location for future anchored shopping center development. Viable retail formats associated with the Veterans Athletic Complex, lake and open space network, and business park campus may include food and beverage establishments and business services housed in small freestanding retail buildings or incorporated into multi-tenant office and commercial buildings.

The Community Housing Study with Strategies for Affordable Housing (2019) identified the project area as a potential housing development site. While the project area offers all the necessary locational and site characteristics to support residential development, this land use does not present the project area's highest-and-best use. As an option, as well as to allow for a flexible master plan, development parcels could be designed within the business park component that could be suitable for detached or attached housing should the long-term market demand dictate such uses.



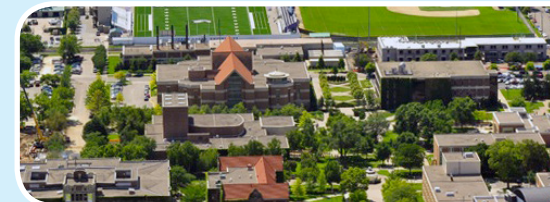
ATHLETIC COMPLEX

Image Credit: Olsson Associates



BUSINESS PARK CAMPUS

Image Credit: Great South Road



INNOVATION CAMPUS

Image Credit: Winona State University



LIMITED RETAIL

Image Credit: Google Earth Pro



RECREATION/OPEN SPACE

Image Credit: City of Weston, FL

Projected Absorption

A long-term development time horizon for the project area is anticipated given the large inventory of land. By providing a unique mixed-use setting the property could garner above average market shares of office, medical, and light industrial space absorption. Through 2030, the project area is forecast to absorb an estimated 122,000 to 195,000 square feet of commercial and light industrial space.

Near-term redevelopment opportunities include adaptive re-use of selective buildings on the Veterans Home campus, continued expansion of the Veterans Athletic Complex, and construction of an expanded lake system, open space, and trail network.

Forecast Commercial Space Absorption in Square Feet (2017 - 2030)		
	Moderate Scenario	Optimistic Scenario
Professional Office	13,600	35,000
Medical Office	33,500	46,500
Light Industrial	70,000	103,250
Retail	5,000	10,000
TOTALS	122,100	194,750

Site Analysis Findings

The project area’s existing conditions were examined utilizing data provided by the City of Grand Island and Natural Resources Conservation Service. Included in this review were land use, zoning, floodplain, soil, utility, ownership, and topography data. The following sections summarize the findings of this examination.

Existing Land Use

The character of the project area is primarily rural and agricultural, with approximately 305 acres of agricultural fields currently in production and 95 acres of open space. Parks and recreational uses make up approximately 94 acres, while veterans' uses, including the Veterans Cemetery, Veterans Home, United Veterans Club, and Veterans Park facilities, cover approximately 64 acres. An approximate 15-acre linear section along the western boundary contains 14 single-family residences.

Existing Zoning

The project area falls within two zoning districts. North of Old Highway 2, the property area is zoned LLR Large Lot Residential, while south, the property is zoned RO Residential Office. The intent of the RO zone is to provide the highest density of residential uses, as well as office, personal services, and professional uses. The intent of the LLR zone is to provide for a transition from rural to urban uses; it permits residential dwellings at a maximum density of two dwelling units per acre, as well

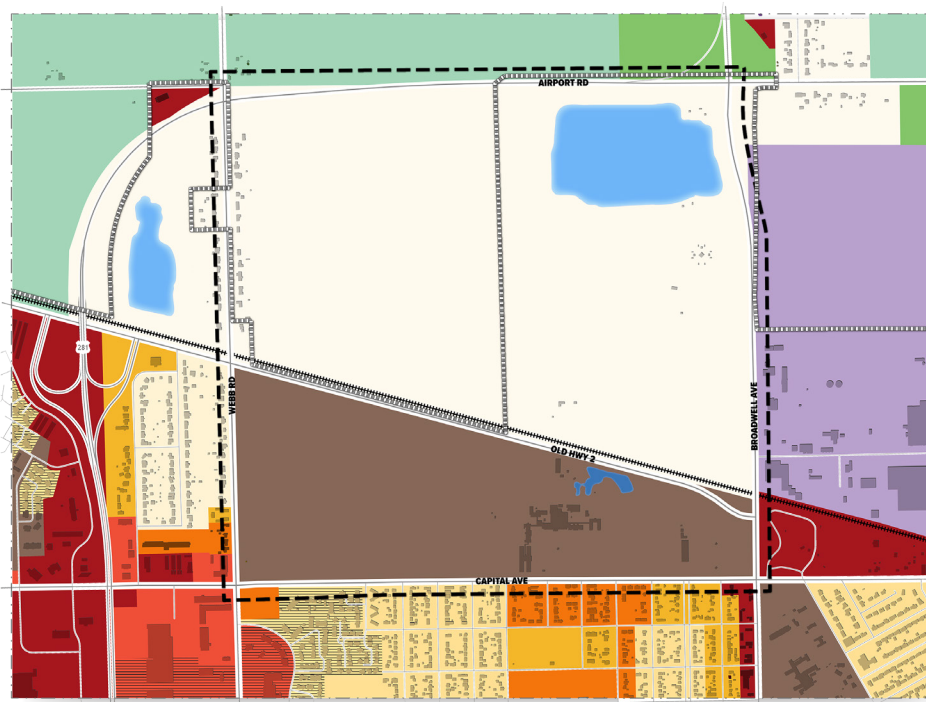
as other open space and recreational activities. Currently, all uses are conforming, given the fact that public parks and recreational areas are permitted uses within both zoning districts.

Future Land Use

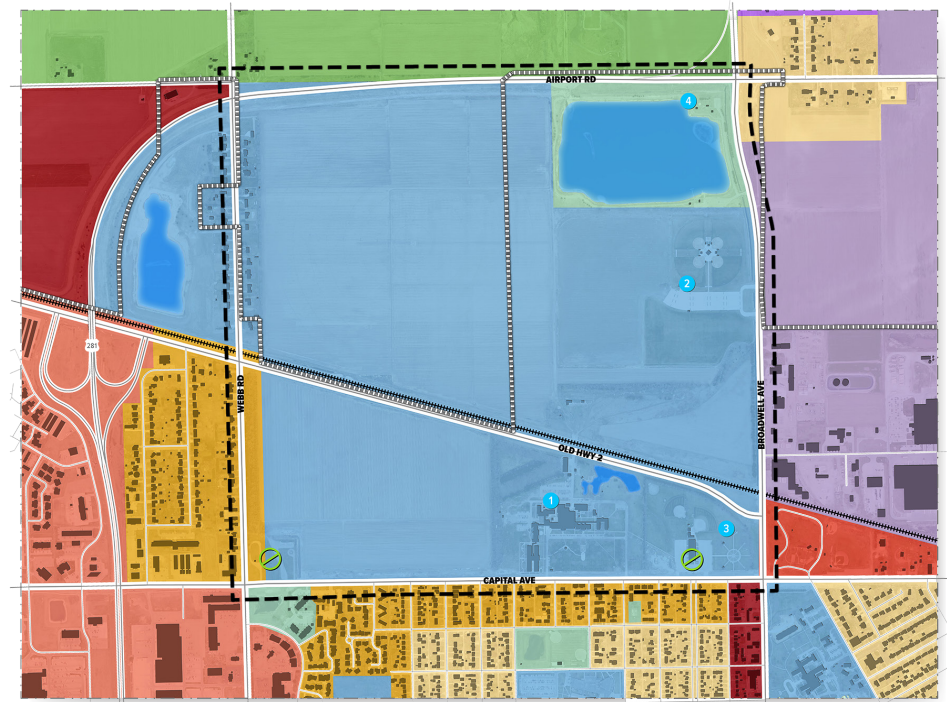
Currently, the project area is planned to be a public use in the future. This can include institutional and public parks and recreational uses. A small, approximate eight-acre linear section along the western boundary of the project area, south of Old Highway 2, is

planned to be Medium Residential to Office in the future. In this situation, it is perhaps more important to understand adjacent properties' future uses to ensure compatibility with any land use changes to the project area. The project area abuts Medium Residential to Office uses on much of its eastern and southern boundaries, and Manufacturing and Transitional Agriculture uses on its northern and western boundaries. Pockets of Mixed Use Commercial and General Commercial are located at the project area's southwestern corner.

Existing Zoning Districts



Future Land Use (Based on City's Future Land Use Plan) and Places of Interest



Veteran's Legacy Project Master Plan

Floodplain Restrictions

The project area falls almost entirely into the 100-year floodplain (Zone A or AE). This constraint is known and understood by the City of Grand Island, as it is a common development constraint faced by the City. Discussions prior to this planning process involved the idea of transferring fill from the property directly north of Airport Road to achieve necessary elevations within the project area, in order to remove parcels from the floodplain as development occurs.

There are two main water bodies within the project area: Eagle Scout Lake (northeastern corner of the site) and a small fishing lake north of the Veterans Home campus, in the southeastern quadrant of the project area.

Soil Types

According to the NRCS Web Soil Survey, there are nine distinct soil types within the project area. Soil types are differentiated by physical, chemical, and biological characteristics such as texture, structure, density, PH, and organic

matter. These soil properties influence the development of building sites, including the design, construction, performance, and maintenance of structures.

The majority of the soil on site consists of Wood River Silt Loam (0-1% slopes), also with sizable portions of Hall Silt Loam, Sandy Substratum (0-1% slopes), Wood River-Silver Creek Fine Sandy Loam (0-2% slopes), Wood River-Silver Creek Silt Loam (0-1% slopes), and Ortello Fine Sandy Loam, Silty Substratum (0-3% slopes).

According to the NRCS, the Wood River Silt Loam is somewhat limited for construction of structures with basements and very limited for construction of small commercial buildings. These limitations are due to a high shrink-swell factor. This soil type is also very limited for the construction of local roads and streets due to its large shrink-swell factor and low strength.

Before any construction occurs within the project area, it is recommended that a detailed soil report is prepared and that soil preparation/amendment recommendations are followed.

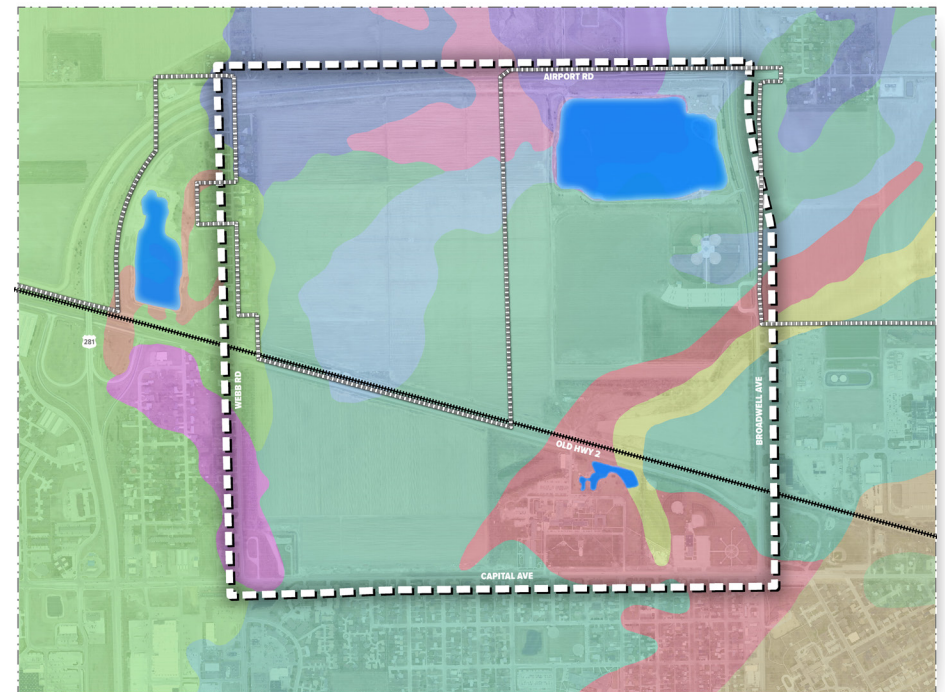
Floodplain



- Special Flood Hazard Area (Zone A or AE)
- City Limits
- Railroad
- Project Boundary



Soil Types



- | | | |
|--|---|--|
| Wood River Silt Loam | Silver Creek Silt Loam, Saline-Alkali Complex | Gayville Loam |
| Wood River-Silver Creek Silt Loam | Brocksburg Loam | Hall Silt Loam, Sandy Substratum |
| O'Neill & Pivot Loams | Ortello Fine Sandy Loam, Silty Substratum | Valentine Loamy Fine Sand, Loamy Substratum |
| Hall, Eroded Hobbs, Occasionally Flooded, Silt Loams | Wood River-Silver Creek Fine Sandy Loam | |
| Jansen Fine Sandy Loam, Overblown, Levelled | | |
- City Limits
 - Railroad
 - Project Boundary



Topography

In general, the project area is relatively flat. The highest elevation is 1,872 feet above sea level, occurring at the southwestern corner of the project area (Veterans Cemetery), at the intersection of Capital Avenue and Webb Road. The lowest elevation is 1,852 above sea level, along Eagle Scout Lake. Given these elevations, the maximum variation in grade across the project area is 20 feet.

Moving from the east to the west, the project area gains elevation. The far western edge of the project area, containing residences, a tree line, and the Veterans Cemetery, features the highest elevations (1,864-1,872 feet above sea level). The Veterans Home property sits at 1,864-1,866 feet above sea level.

The majority of the project area is at 1,862-1,864 feet above sea level. Given these elevations, topographical concerns will likely be limited during construction.

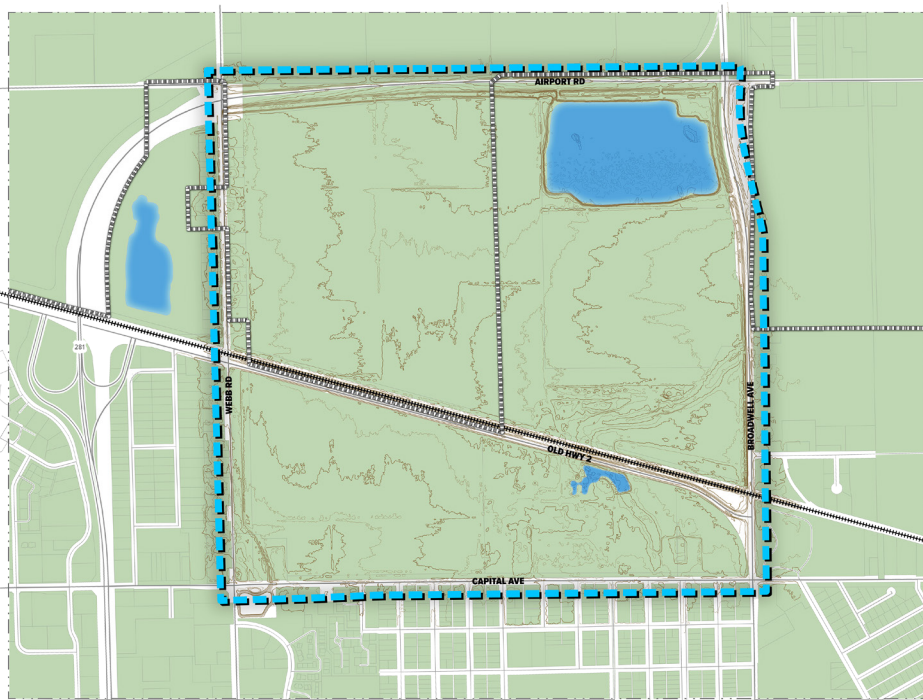
Property Ownership

The project area is owned by 18 different parties, including private residential property owners, institutions, and jurisdictions. The majority of the project area is owned by the City of Grand Island. In fact, the City currently owns over 75 percent of the project area. The City's ownership will increase once the State of Nebraska transfers the Veterans Home property to the City.

The State of Nebraska Soldiers Home currently owns the Veterans Cemetery and the property upon which the Veterans Home campus sits. The other sizable portion of the project area (southeastern corner of the project area) is owned by Hall County. The Veterans Park is situated on this County land, though it should be noted that the land directly under the United Veterans Club's buildings is owned by the United Veterans Club.

Therefore, few ownership interests exist within the greater project area.

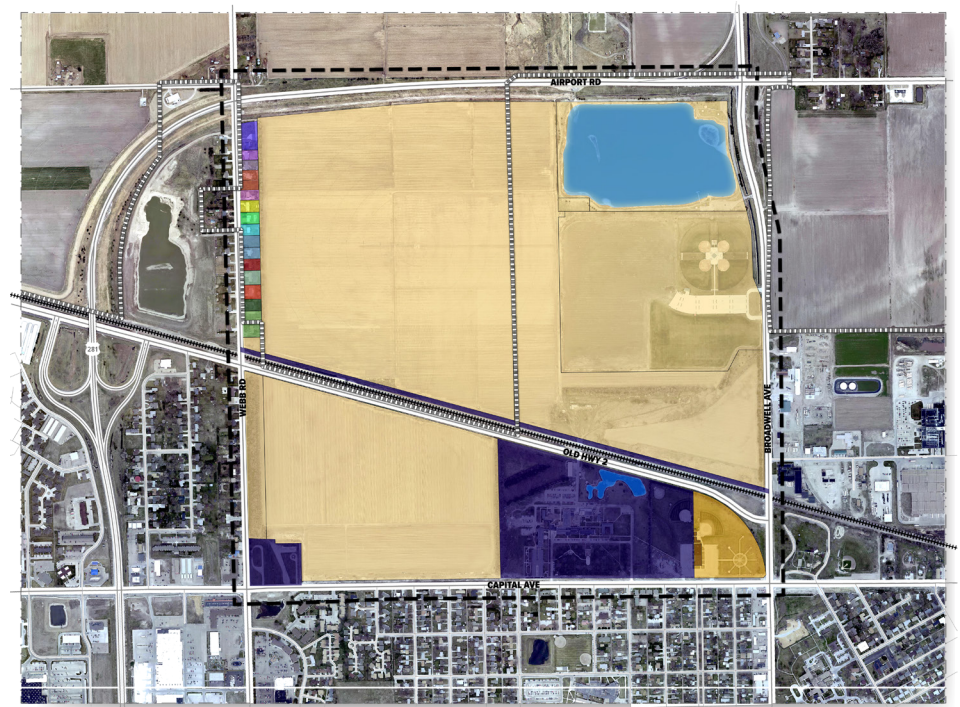
Topography



- 1 ft. Topographic Contour
- 2 ft. Topographic Contour
- City Limits
- Railroad
- Project Boundary



Property Ownership



- | | | |
|------------------------|------------------------------|-----------------------------|
| Alvin and Teresa Avery | Sheri Payne | Allen and Carol Lee Swanson |
| Patrick Baker | James and Jacqueline Rudnick | United Veterans Club |
| Golda Bockbrader | Layton and Sandra Schlotfeld | Van Vohland |
| City of Grand Island | Craig and Darlene Schoneberg | Kevin and Susan Vollmer |
| Hall County | State of NE Soldiers Home | City Limits |
| Jeannine Engle | Virginia Stevens | Railroad |
| Timothy Jakubowski | | Project Boundary |
| Amy Norton | | |



Utilities and Infrastructure

Water Distribution System

The project area is surrounded by City-owned water main on all four sides. There is a 20-inch distribution main along Webb Road on the west side of the property, a 14-inch main along Highway 281 on the north side, and an 18-inch main on the south side along Capital Avenue. The east side of Broadwell Avenue has water mains ranging in size from six inches to 12 inches from the existing ball fields south to Capital Avenue; however, a 12-inch main loop runs 1,200 feet east of Broadwell, which could be utilized if necessary. There are currently several fire hydrants and services along these water mains. Existing water mains are accessible to the project area and have capacity to serve future development.

Sanitary Collection System

Running along the south edge of the project area is a 48-inch sanitary trunk line that is approximately 19 feet deep. An 18-inch sanitary stub out has already been installed at the southeast corner of the project area at Broadwell Avenue to serve future development north of the train tracks. Two 12-inch stubs are located on the south end of the project area along Capital Avenue and have the capacity to serve the project area south of the tracks, as well as part of the development north of the tracks. There is existing sanitary sewer along the east and west sides of the project area that is currently serving existing residential and industrial users and should not be considered for this development.

Electrical Utility Service

There are existing 13.8 kV overhead full feeder distribution lines along the perimeter of the project area that have the capability to serve future development within the project area.

Storm Sewer System

Moore's Creek drain way (shown in the image below), which eventually outlets into Eagle Scout Lake, runs along the north side of the project area. This drain way is the current outlet for much of the storm water from northwest Grand Island. Along Capital Avenue is an existing 48-inch trunk sewer line that has adequate capacity to serve the needs of the development south of the train tracks. Along Broadwell Avenue is the Capital Avenue outfall ditch that can serve future outlet facilities, but currently operates close to capacity. In general, overland stormwater flow across the project area is from the southwest to northeast; therefore, future stormwater improvements should be planned accordingly.



Image Credit: Google Earth Pro

3.0 Engagement Process

Quick Facts

Public Survey

When: June 23, 2017-July 23, 2017
Where: www.GrandIslandVetsPlan.com
What: 10-question survey
Who: 184 respondents

Charrette

When: July 26-28, 2017
Where: Grand Island Utilities Department
What: 6 Stakeholder Sessions + 4 Closed Planning Sessions
Who: Approximately 35 stakeholders

Public Open House

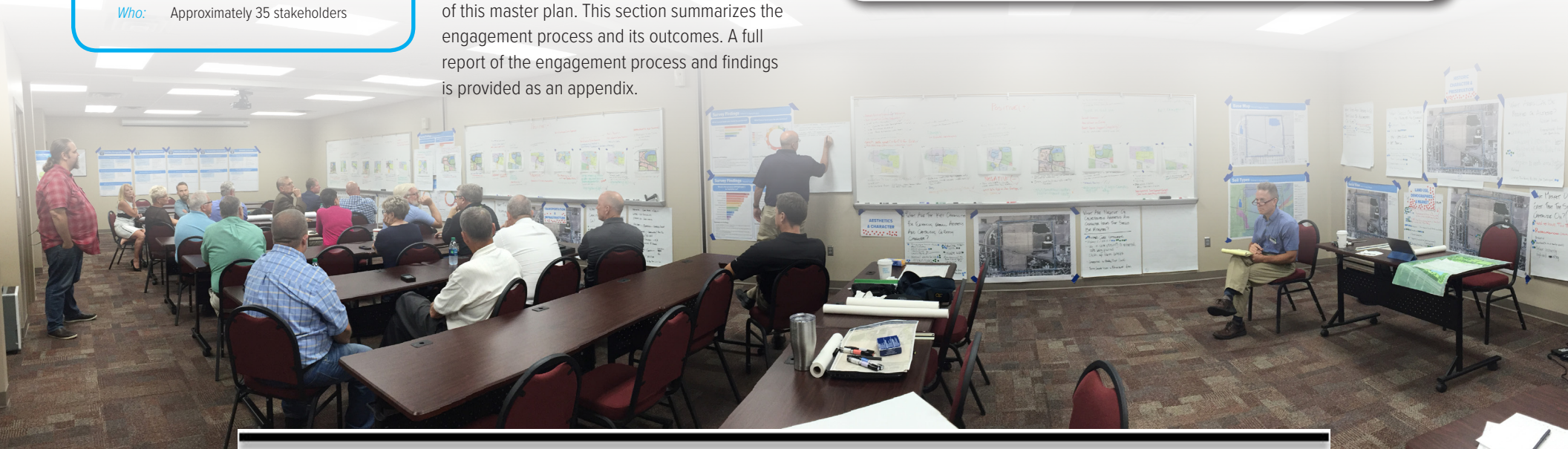
When: July 27, 2017
Where: Bosselman Conference Center
What: Review and comment stations
Who: Approximately 110 attendees

Master Plan Presentation

When: November 1, 2017
Where: Grand Island Utilities Department
What: 1 Presentation
Who: Approximately 35 stakeholders

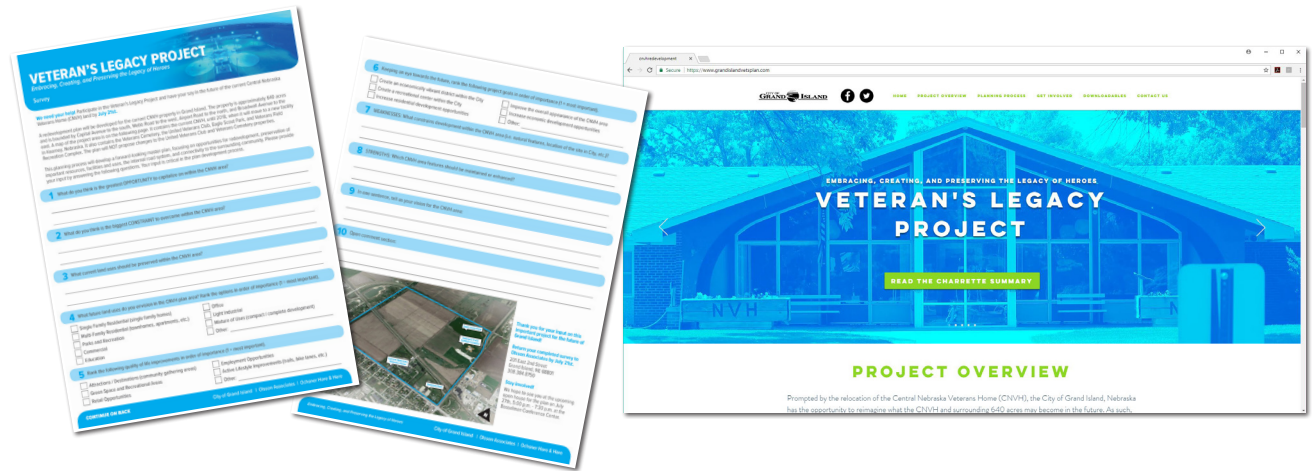
Fruitful and meaningful community engagement lies at the heart of every successful planning effort. The conversation between those that have a technical and an objective understanding of the project area and those with on-the-ground knowledge should be ongoing throughout the planning process. This engagement process should be collaborative, personal, and involve much listening by both parties. In the end, a solid plan is developed with the community, and not just for it.

This master plan was developed with a core group of stakeholders and members of the Grand Island community. Through a series of meetings, open interviews, and a charrette, the planning team was able to work with the community on the thoughts, ideas, and comments that became the recommendations of this master plan. This section summarizes the engagement process and its outcomes. A full report of the engagement process and findings is provided as an appendix.

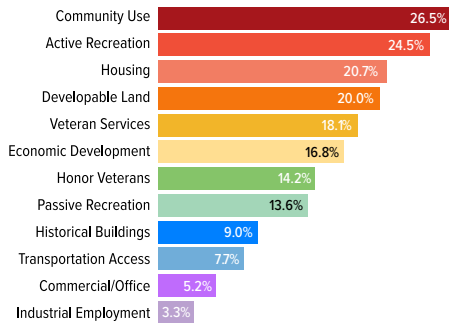


Public Survey

In order to provide context for the stakeholders and public, the planning team created a survey (both online and on paper) that asked participants about the issues and opportunities and their values for the project area. In total, 184 surveys were completed. The following text and graphics illustrate the survey findings:



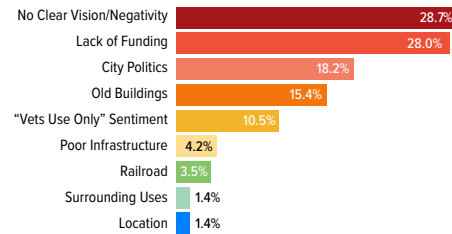
1 What is the greatest OPPORTUNITY to capitalize on?



Summary of Findings

- To survey respondents, the greatest opportunity within the project area is to make a space useable and enjoyed by the entire community.
- Following closely behind, increased and enhanced active recreation opportunities are preferred.
- Increased (affordable) housing options for veterans and Grand Island residents alike was the third most noted opportunity.
- While noted, increased industrial space and associated employment opportunities were mentioned infrequently.

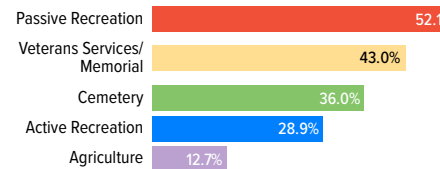
2 What is the biggest CONSTRAINT to overcome?



Summary of Findings

- The lack of a clear and unified vision for the project area, as well as the negativity surrounding the relocation of the Veterans Home, is the largest constraint on the project.
- Following closely behind, a lack of funding was noted as a constraint to overcome.
- It is important to note that perceived City politics and distrust of elected officials is a project constraint; 18.2 percent of the responses mentioned City politics.
- In general, the surrounding uses and location of the site are suitable.

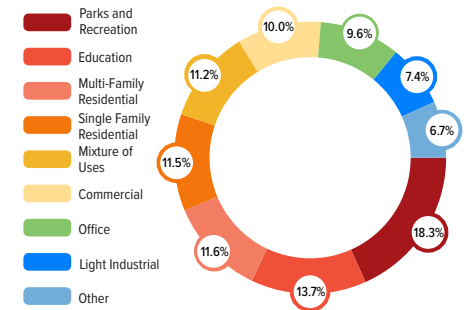
3 What current land uses should be preserved?



Summary of Findings

- The current passive recreation opportunities, including the lake, green space, etc., are the most valuable to survey respondents.
- Following closely behind, the current veteran services offered and veteran memorials should be preserved, according to survey respondents.
- While agriculture was noted as an important land use to preserve in 12.7 percent of the responses, it was mentioned infrequently.

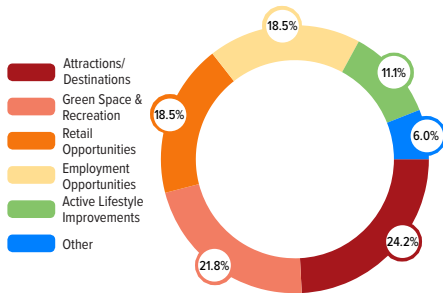
4 What future land uses do you envision?



Summary of Findings

- Parks and recreation is the most envisioned land use within the project area.
- Following parks and recreation, education (either high school or college-level) is a highly preferred land use.
- Light industrial is the least preferred land use.
- "Other" responses primarily include the following:
 - Agriculture
 - Technology
 - Veteran only housing and services

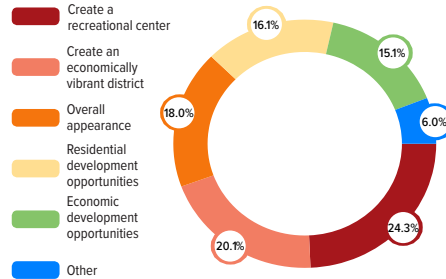
5 Rank the following quality of life improvements.



Summary of Findings

- Survey respondents most want more attractions and destinations within the project area; community gathering areas are desired.
- Similar to other findings, survey respondents hope for more green space and recreational opportunities.
- “Other” responses primarily include the following:
 - Formal education opportunities
 - Veteran only housing and services development
 - Affordable housing options

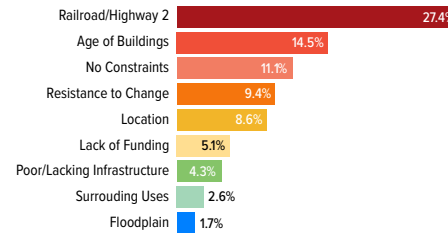
6 Keeping an eye toward the future, rank the following project goals.



Summary of Findings

- Survey respondents prioritized the creation of a recreational center within Grand Island, following closely by the creation of an economically vibrant district within the City.
- Pure economic development is the least important project goal to survey respondents.
- “Other” responses primarily include the following:
 - Increase educational opportunities
 - Increase veteran services and memorials
 - Install clean technologies

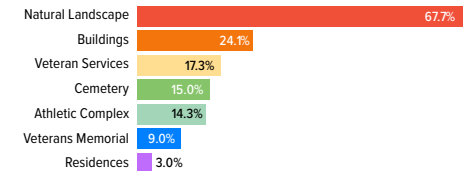
7 WEAKNESSES: What constrains development?



Summary of Findings

- The largest development constraint is railroad / Highway 2 that divides the project area.
- While some of the buildings may be reused and renovated, the overall age of the buildings presents high costs.
- It should be noted that 11.1 percent of the responses to this question stated that the site is ready for development and that no constraints are present.

8 STRENGTHS: Which area features should be maintained or enhanced?



Summary of Findings

- The natural landscape and associated features (green space, lake, etc.) is the most important project area feature to maintain and enhance, by far.
- Survey respondents find value in the existing buildings; opportunities for reuse/renovation will likely be supported by survey respondents.
- In general, the existing residences within the project area are not critical to maintain and enhance, though their future should be discussed.



Charrette + Public Open House

Before a master plan's vision can be crafted, it is important to meet with stakeholders and members of the public to ensure that the preliminary planning recommendations and current understanding of the project area are in line with their knowledge and desires. The charrette provided this opportunity.

A charrette advances the master planning process, narrowing in on preferred concepts as determined by the stakeholders, City staff members, and the public. Over this three-day period the planning team met multiple times with stakeholders, once with city staff members and infrastructure partners, and once with the public to gather insight on their overall vision for the project area, programming preferences, and critical aspects to the master plan.

For clarity's sake, discussions were divided into five topics:

- Land Use, Demographics, and Market
- Historic Character and Preservation
- Development and Redevelopment
- Aesthetics and Character
- Transportation and Infrastructure

In preparation for the charrette, the planning team prepared site analysis maps, created a project website and public survey, gathered preliminary demographic and economic data, and visited the project area. This information provided the necessary context for the planning team to ask the right questions, in order to unveil the consensus-driven vision for the project area.

Between each session with the stakeholder groups, the public, and the City and infrastructure partners group, the planning team was able to digest, summarize, and alter the concepts according to feedback received.

Through the charrette, the planning team—in partnership with the stakeholders and public—was able to achieve the following goals:

- Clarify key issues and common concerns
- Identify positive site features
- Explore various master plan concepts and associated elements
- Narrow concepts to final concepts through prioritization exercises and consensus building

What's the purpose of a charrette?

1 Assemble

Assemble key decision makers, such as City staff members, elected officials, business owners, real estate developers, veterans, etc.

2 Collaborate

Collaborate with the decision makers in information sharing about the project area, iterative design concepts, and feedback and revisions.

3 Finetune

Finetune the master plan concept through strategic conversations with stakeholders, the public, and the City.

4 Create

Create a community-driven, realistic plan, grounded in market and economic reality.

Issue Identification and Priorities

The first exercise focused on visioning and the identification of issues and opportunities within the project area. Stakeholders were divided into five groups and responded to various topical questions. Then, the stakeholders prioritized the topics of discussion and, second, their responses to each question. Members of the public responded to the same questions during the public open house. The following paragraphs detail the stakeholders' and public's priorities, in order of prioritized topics (note: *Transportation and Infrastructure* and *Historic Character and Preservation* tied as topics of importance).

1 Land Use, Demographics, and Market

When asked about appropriate uses for the project area, stakeholders prioritized secondary educational uses, employment and recreational opportunities, and a cemetery expansion. Participants at the open house responded similarly, mentioning the need for employment, educational, and recreational opportunities, though the majority of participants stated that these uses should be primarily for veterans and their families.

Keeping the larger community's needs in mind, stakeholders found that housing and a hotel / convention center could be accommodated within the project area. Open house participants primarily mentioned housing for veterans.

Finally, when asked about market opportunities that the project area's redevelopment could capitalize on, stakeholders prioritized an educational campus.

2 Development and Redevelopment

As key redevelopment and development opportunities, stakeholders prioritized higher education uses (specifically for the Veterans Home campus) and a fieldhouse / aquatic center (north of Old Highway 2). Open house participants repeatedly mentioned housing for veterans, but also enhancing Veterans Park as a memorial to veterans. The development of a multi-use area, including recreational, office, housing, and open space uses was also recorded.

When asked about key hurdles to the project area's development and redevelopment, stakeholders noted the community's lack of consensus and the floodplain development constraint. Open house participants noted similar hurdles, including a lack of funding and a distrust of public officials.

3 Transportation and Infrastructure

Stakeholders stated that a pedestrian bridge to connect the southern half of the project area to the northern half of the project area was missing, and functions as a site insufficiency. The public mentioned the railroad traffic as a site insufficiency.

When asked about what existing transportation and infrastructure capacities can be capitalized on, stakeholders noted potential construction of a Custer Avenue overpass with pedestrian access, and the surrounding utility infrastructure. The public also noted connections with hike and bike trails and existing public transit routes.

3 Historic Character and Preservation

When discussing historic character and preservation, stakeholders focused on enhancement and protection of the cemetery and the Veterans Home (as a tribute to the veterans and to maintain the character of the project area). Open house participants similarly want to see the historic buildings across the campus and the fishing lake preserved.

Stakeholders hope to see a northern extension of the hike and bike trails, as well as reuse of existing buildings. The open house participants noted that the Veterans Athletic Complex could be enlarged, as well as the cemetery (for veterans' use only). Mixed responses surrounded the agricultural land; some open house participants stated that it should be developed to increase the tax base, while others thought that it should be left alone, using the revenue to fund veterans' affairs.

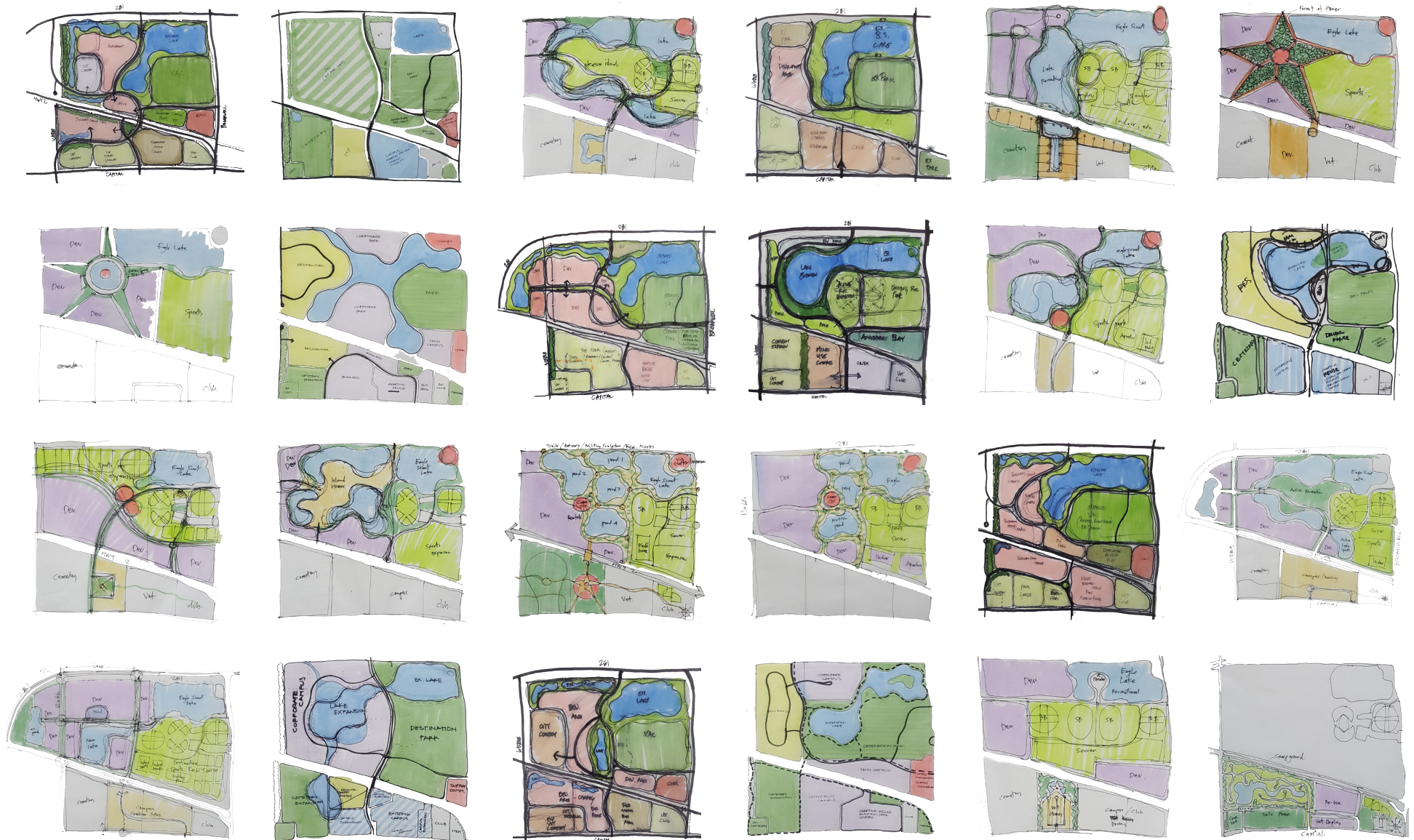
4 Aesthetics and Character

Stakeholders identified multiple opportunities to enhance the overall aesthetics and character of the project area. The development of an amphitheater and expansion of the hike and bike trail network were prioritized as key enhancement opportunities. Open house participants primarily mentioned maintenance and enhancement of the fishing lake, Veterans Park, and the landscaping throughout the project area.

When asked about objectionable aesthetics and character features that should be mitigated, stakeholders prioritized Old Highway 2 / railroad and enhancements to Moore's Creek.

Concept Exploration

During a closed planning session during day two, the planning team developed 24 initial master plan sketches. Stakeholders provided feedback on the initial sketches, allowing the planning team to further refine them before the public open house later that evening. The public was asked to review and provide comments on each of the 24 concepts. The public's response to the concepts is detailed in the Engagement Process and Findings Appendix.



Summarized Stakeholder Findings

After the stakeholders reviewed all 24 initial sketches, the planning team led a discussion about the stakeholders' preferred features to be included in the final master plan concept. The following list and the public feedback provided the necessary direction for the planning team to narrow the master plan concepts.

- **Interconnected water spaces** that are not choppy and that are attractive for business development and active recreation
- **Waterway views** that are shared by all users (land development parcels, roadways, and park development)
- **Separation of parks from education;** keep each in their own respective area (north and south)
- **Easy site access north of Highway 2** and its borrowed open space views
- **Non-residential development** that is incorporated with water
- **Development with maintenance requirements and development costs in mind**
- **Individual tract development** that avoids choppy development styles
- **Fieldhouse development** within the athletic field complex
- **Keeping Custer Avenue out of parcel north of Highway 2** to maintain southern half of property's continuity
- **Pedestrian bridge** to tie the north and south property together
- **Linked trail systems with homage to veterans** through the use of stations
- **Open northern half of property** for development

Concept Narrowing and Prioritization

With the public's comments in mind, stakeholders voted for their favorite concepts in an effort to identify the common, liked features. Then, the planning team further analyzed the three concepts that received the highest number of votes and prepared three narrowed concepts from which the final master plan was created. The three graphics that follow represent these narrowed concepts. The final set of stakeholder comments regarding each narrowed concept is provided, as well.

Narrowed Concept #1



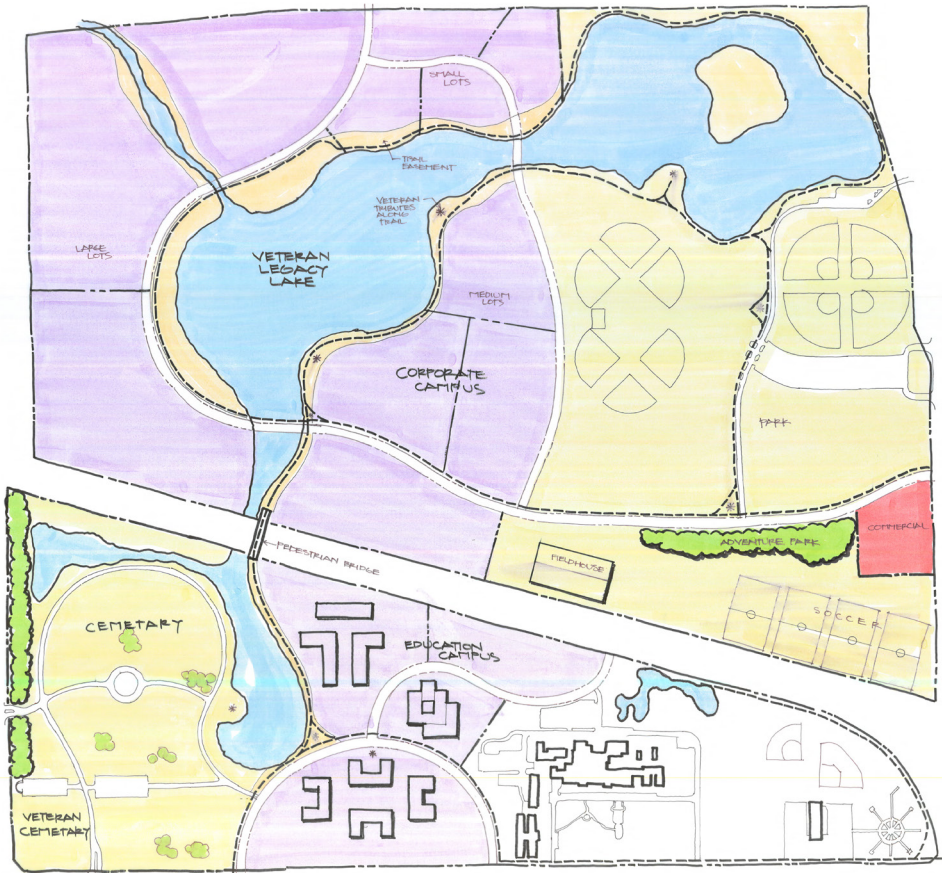
Like

- Developing both sides of Webb Road
- Active waterway
- Multiple memorial points instead of a singular memorial site
- Boathouse restaurant
- Water layout
- Aquatics and fieldhouse
- Efficient sports and recreation layout
- Recreation focus
- Amount of green space

Dislike

- Moved homes
- Development west of Webb Road
- Amount of shoreline to maintain
- Size of lake
- No pedestrian overpass
- Lazy lake concept
- Seems to be most expensive option

Narrowed Concept #2



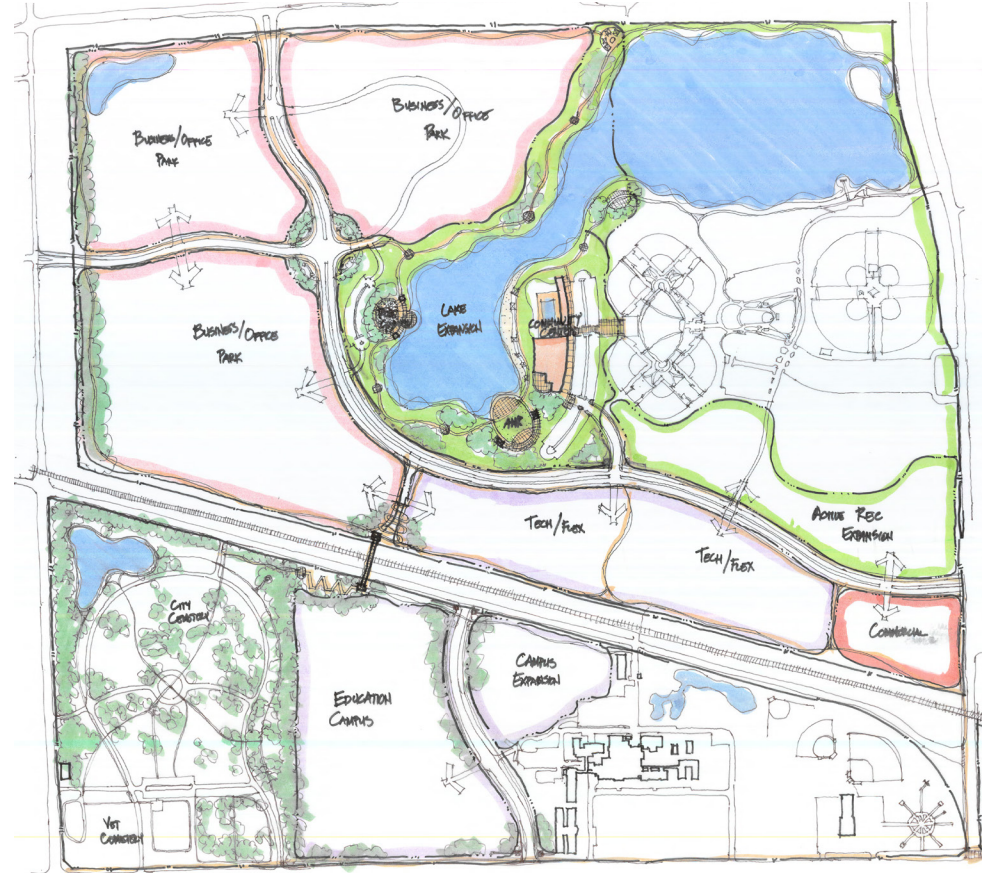
Like

- Variety of options
- Cemetery design that honors veterans
- Educational campus layout
- North / south water flow
- Pedestrian bridge
- Support commercial
- Balance of tax revenue generating properties and green space

Dislike

- Lack of green space
- Location of fieldhouse and aquatics center
- Distance between soccer fields and baseball fields

Narrowed Concept #3



Like

- Appropriate lake size for business park use
- Community center, amphitheater, and garden
- Use of water and site layout
- Income from development opportunities
- Business park concept
- Pedestrian bridge
- Educational campus for four-year liberal arts college
- Cemetery
- Balance of development, education, and green space
- Water wrapped around athletic complex
- Soccer fields
- East / west connection along Broadwell Avenue

Dislike

- Missing housing
- The only way to enjoy is with a drive or long bike ride

Master Plan Presentation

As the final step in the engagement process, the planning team presented one final master plan to the stakeholders, which was narrowed from the three previously presented master plans. The planning team walked through the plan document, explained the master plan details, and asked the stakeholders what was missing from the master plan.

Stakeholders' primary concerns revolved around the public beach and the lack of a competitive indoor pool facility. Concerns were raised that a public beach proposed nearby the community center may pose potential safety issues. Rather, stakeholders requested that the area be utilized strictly as a water access point for kayak, canoe, and paddleboat users. Note that water access will also be available at the proposed boathouse.

To ensure that the project area has a strong regional draw for a variety of sporting and recreational events, stakeholders requested the addition of a natatorium to host competitive water-based sport events.

Stakeholders had general concerns about providing enough parking for the multiple uses within the project area. In addition, discussion about a possible public education process about the difference between light industrial and industrial/heavy industrial uses took place. Various stakeholders want community members to understand the difference in uses, making it clear that heavy manufacturing is not proposed within the project area.

To end, the planning team led a discussion about implementation to gain a clear understanding of the stakeholders take on the following questions:

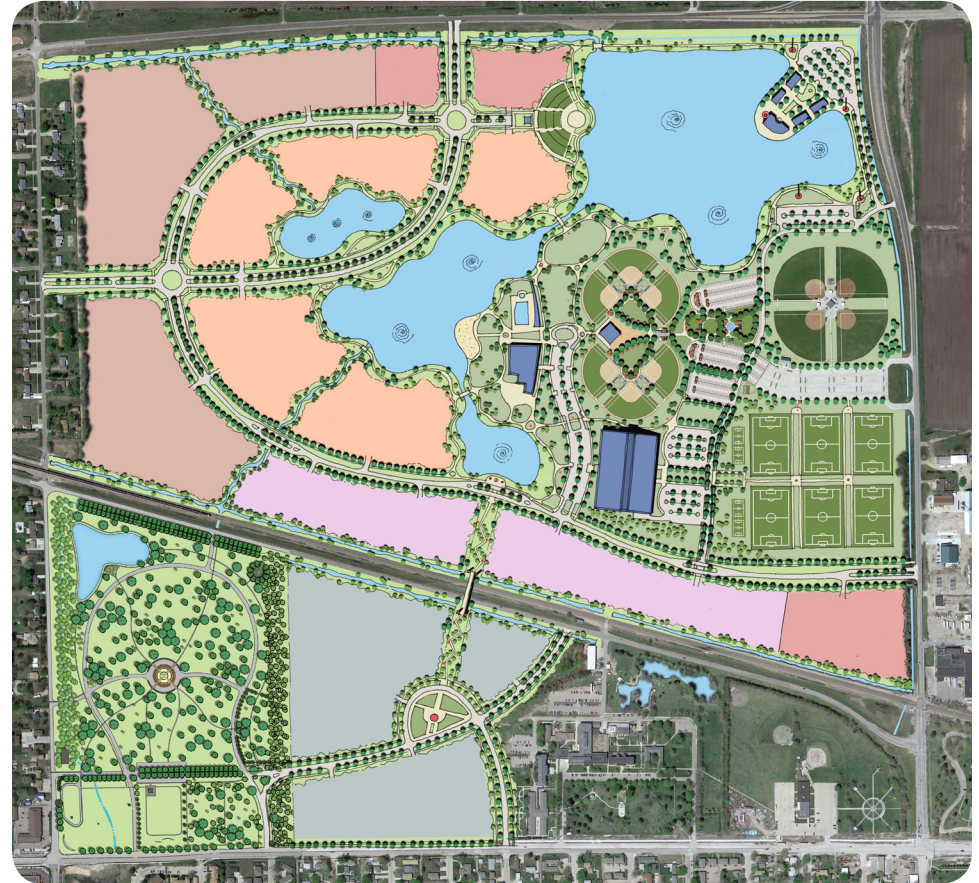
- Of what is proposed in the master plan, what is easy to implement?
- What stands in the way of implementation?

Stakeholders stated that the ballfields, including the existing/planned expansion of softball fields, the splash pad, and the soccer fields, would be the easiest to implement, as construction was already taking place at the Veterans Athletic Complex. Secondly, the full expansion of Eagle Scout Lake, despite its cost, was viewed as an easily-supportable improvement. Other easily-implementable items included:

- Boathouse and surrounding restaurants
- Webb Road and Broadwell Avenue railroad quiet zone
- Pattern book to guide the look, feel, and branding of the project area
- Neighborhood Commercial site at the intersection of Broadwell Avenue and the proposed entrance north of the railroad
- Fieldhouse

Stakeholders also noted several items that must be overcome to begin implementation, including the following:

Presented Master Plan *(Review Purposes Only - Not Final)*



- Selling the overall master plan to the entire community and the development community
- Developers' expectation that sites will be "shovel ready"
- Ensuring enough private development to then fund more public infrastructure
- Pro formas that work
- Need for wide-reaching marketing plan
- Lack of public dollars
- Future use of the Veterans Home buildings

4.0

Master Plan

The previous sections of this plan were compiled to explain the project area's strengths, weaknesses, opportunities, and constraints. Ultimately, the final master plan was developed in light of this information. This section integrates the varying viewpoints of the public, City staff members, and the stakeholder group into a comprehensive vision for the project area. The textual, visual, and graphical recommendations that follow will serve as a guide for the future development, redevelopment, reuse of the project area.

Planning Objectives Overview

At first look, the project area offers a range of land use, redevelopment, and development possibilities, given its large size (640 acres). Furthermore, much of the land is undeveloped. Therefore, the guiding factor upon which this plan is based is not existing circulation patterns or existing architectural structures, but rather a desire to acknowledge and honor veterans at a proper scale, while also balancing the community's need for quality of life enhancements and economic development opportunities.

The plan envisions new and enhanced veterans' memorials, new community gathering spaces, attractive development opportunities, enhanced natural assets, and increased interaction with nature through a trail system and recreational opportunities.

Though initially viewed as a site constraint, Old Highway 2 and the parallel railroad offer a practical and tangible way to divide the project area into two different subareas: north and south.

North Subarea

The overall planning objective for the North Subarea is to create a connected, multi-use, multi-user, and active atmosphere, with a regional draw.

The North Subarea is largely undeveloped, creating a unique opportunity to define the City's edge and implement community desires for economic development and parks and recreational enhancements. The existing recreational uses, including Eagle Scout Lake / Park and the Veterans Athletic Complex will be enhanced and capitalized on.

The North and South Subarea will be knit together physically with a pedestrian bridge, but also thematically with a "Local Heroes Trail System" throughout the North Subarea and multiple references and memorials to veterans and their service in the South Subarea.

South Subarea

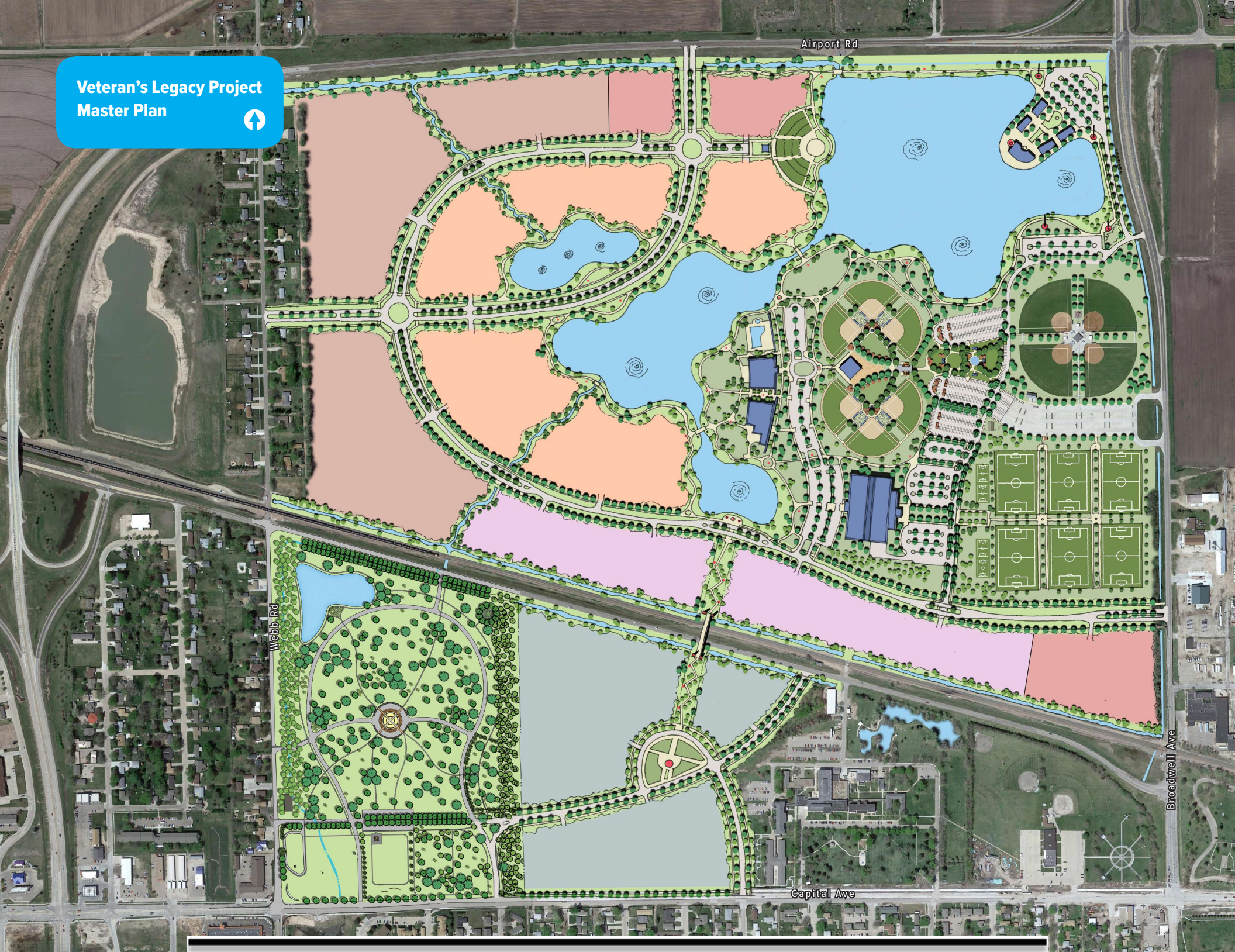
The overall planning objective for the South Subarea is to honor and memorialize veterans, while meeting community educational and programming needs.



The South Subarea will continue to be defined by the Veterans Cemetery (in line with the Veterans Cemetery Master Plan), the United Veterans Club, and Veterans Park. The existing Veterans Home campus buildings are important community and historic assets. As such, their use can be re-imagined as a way to honor the history, enliven the space, and provide for economic development.

Stakeholders and community members repeatedly mentioned the need for educational space, whether it be a trade school or a satellite campus of a four-year university. The campus-like nature of the Veterans Home was noted as a clear opportunity for this sort of educational development, even permitting future campus expansion to the west (Innovation Campus land use).

Veteran's Legacy Project
Master Plan



Land Use and Zoning

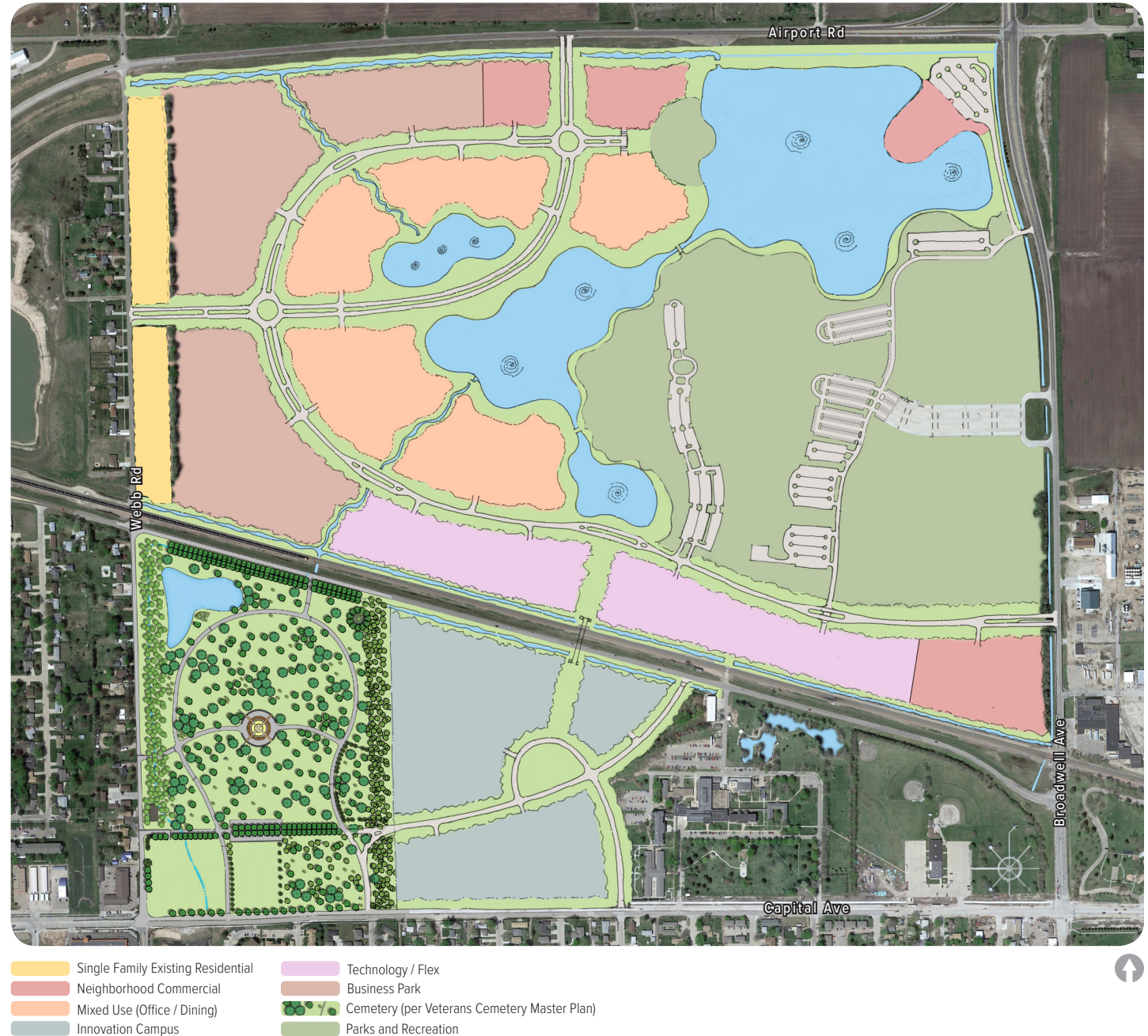
Land use and zoning designations are critical tools when guiding the density and type of development within the project area. The compatibility of designated land uses and the underlying zoning districts must be regularly evaluated to ensure that (1) the desired style of development is possible and that (2) the community's needs are met through the current regulations.

The creation of a Future Land Use Framework is an essential step in the planning process, as it provides the general plan for future development, redevelopment, and reuse projects, including those that will serve to increase Grand Island's tax base, honor the veterans, and/or create a recreational hub for community members and the region. Multiple development and reuse public and private projects exist, given the vast amount of undeveloped land and the existing uses, such as the Veterans Cemetery and Eagle Scout Lake, which provide character to capitalize on.

Following the Future Land Use Framework is a description and illustration of the future land uses, as well as suggested zoning changes. Ultimate zoning changes will depend on the eventual site and building design; the "suggested zoning changes" are based solely on general zoning district intent in an effort to pair complementary land uses and zoning districts.

For additional description and precedent imagery of the uses highlighted in the Future Land Use Framework, review the Master Plan Details.

Future Land Use Framework



Single Family Existing Residential

This land use is defined by its longstanding single family, large lot residences along the urban fringe. These types of residences act as a transition from rural to urban uses. No changes to the current residences are proposed in this master plan, as their compatibility can be maintained through landscape and architectural screening as the parcels to the east develop.

If this use were to experience disinvestment, higher density residential for employees within the project area or expansion of the business park to the east would be appropriate.

Current Zoning: LLR Large Lot Residential
Suggested Zoning: No change recommended

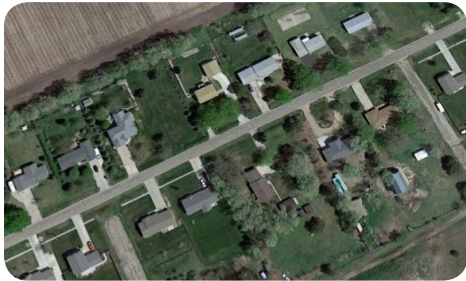


Image Credit: Google Earth Pro



Image Credit: Community Development Strategies

Neighborhood Commercial

This land use is defined by smaller-scale businesses and convenient shopping facilities, typically serving one neighborhood, and in this case, the project area. These areas serve as anchors of commercial and social activity, providing daily and convenient goods and services to nearby residents or employees. Pharmacies, banks, convenience stores, stand-alone restaurants, and professional offices are examples of businesses that would be compatible with the surrounding recreational and employment centers.

The purpose of this land use is to provide services and shopping facilities in close proximity to residences and businesses.

Current Zoning: LLR Large Lot Residential
Suggested Zoning: B-2 General Business



Image Credit: Google Earth Pro



Image Credit: Google Earth Pro

Mixed Use (Office / Dining)

This land use is defined by a mixture of mixed use buildings of varying scales (dining on the first floor and office on upper floors) and standalone offices and dining establishments in a walkable environment. The buildings should be architecturally complementary and oriented toward the water, with clear pedestrian access to the trail system. The adjacent water and recreational opportunities will provide employees with activity options, encouraging an active lifestyle.

The purpose of this land use is to provide dining for employees and surrounding residents and quality, professional office space. This combination will activate the project area throughout the day.

Current Zoning: LLR Large Lot Residential
Suggested Zoning: B-2 General Business



Image Credit: The Pulse



Image Credit: Colorado Group

Innovation Campus

This land use is flexible, but differs from Technology / Flex. Innovation Campus should provide smaller office suites (within a larger building), capable of serving tenants with minimal space requirements. An educational campus, with a focus on math, science, or information technology, would also be appropriate. The campus should be pedestrian-oriented and accessible to green space.

The purpose of this land is to provide space for small-scale businesses, start-ups, co-working, community programming, or an educational and/or skills training campus. This land use will provide entrepreneurs with a right-sized space to begin their ventures utilizing shared resources and with minimal costs.

Current Zoning: RO Residential Office
Suggested Zoning: No change recommended



Image Credit: Nebraska Today



Image Credit: Cambridge Innovation Center

Veteran's Legacy Project Master Plan

Technology / Flex

This land use is defined by its ability to accommodate larger and smaller employers, including light industry and office uses. This land use can take on a variety of forms, from single story buildings to three story buildings. High intensity industrial uses are not suggested for this category, such as large factories producing high levels of noise, traffic, and pollution.

This category is inherently flexible, allowing for a wide variety of uses, such medical, research, and technology. It is important that building design, materials, parking, lighting, and connectivity to the larger master planned area are considered with this use to maintain compatibility with surrounding uses.

Current Zoning: LLR Large Lot Residential
Suggested Zoning: M-1 Light Industrial



Image Credit: ESA, Space in Images



Image Credit: Clark Nexsen

Business Park

This land use is similar to Technology / Flex in that it can accommodate large and small employers, but differs in the fact that the buildings are primarily multi-story (less than four), rather than primarily single-story. Large-scale industrial or residential uses are inappropriate; this land use serves commercial purposes. Buildings should be architecturally complementary and oriented toward the water, with access to the trail system.

The project area's clear access to main roadways, highways, and interstates will benefit this use as a employment center with a regional business and employee draw. The purpose of this land use is to provide a high quality, amenity-rich corporate campus environment.

Current Zoning: LLR Large Lot Residential
Suggested Zoning: B-2 General Business



Image Credit: Heliviz



Image Credit: Sonata Crew

Cemetery (Public)

This land use is defined by its ability to accommodate veterans' and the greater community's need for a cemetery expansion. This public use is largely defined by the previous planning effort: Veterans Cemetery Master Plan. The details of this land use are further defined within that document.

The purpose of this land use is to continue honoring veterans through separate burial grounds and memorials, while also meeting the community's need for a public cemetery expansion. This use should be buffered from all other uses (visibly and audibly) to maintain its sacred character. Enhanced vehicular and pedestrian connectivity (through pathways and narrow roadways) is necessary.

Current Zoning: RO Residential Office
Suggested Zoning: No change recommended



Image Credit: New Hampshire State Veterans Cemetery



Image Credit: Visit Nebraska

Parks and Recreation

This land use is defined by a mixture of green space, multi-scale parks, passive recreation, and active recreation. Included in this land use is the planned expansion of the Veterans Athletic Complex, a large expansion and enhancement of Eagle Scout Lake / Park, a trail system, an amphitheater, a community center, a natatorium, and a fieldhouse. This is a multipurpose, predominant use within the project area.

The purpose of this land use is to provide a community active and passive recreational center for Grand Island and the region. This land use will also provide amenities and views for surrounding uses, increasing the aesthetic appeal and property value for those uses.

Current Zoning: LLR Large Lot Residential
Suggested Zoning: No change recommended



Image Credit: The City of Grand Island, Nebraska



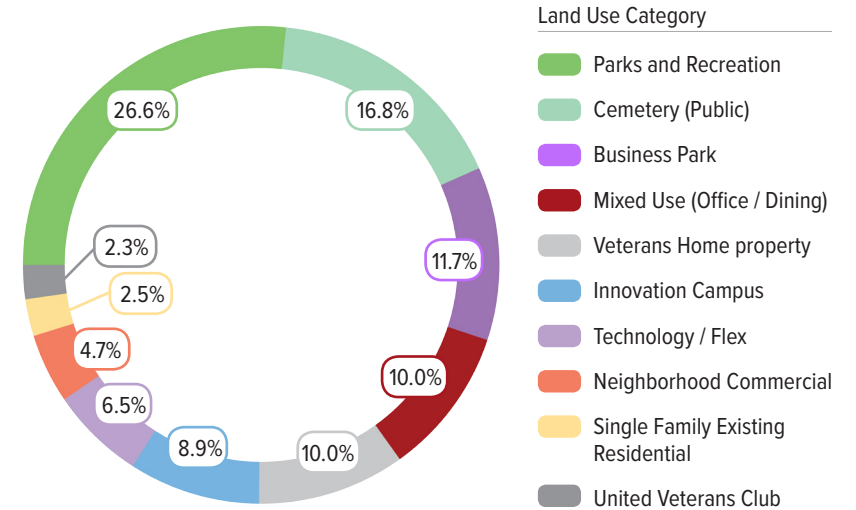
Image Credit: The City of Gilbert, Arizona

Proposed Land Uses by Acreage (Excluding Right-of-Way, Water Bodies, and Easements)

	<i>Acreage</i>	<i>Percentage of Total</i>
Parks and Recreation	114	26.6%
Cemetery (Public)	72	16.8%
Business Park	50	11.7%
Mixed Use (Office / Dining)	43	10.0%
Veterans Home property	43	10.0%
Innovation Campus	38	8.9%
Technology / Flex	28	6.5%
Neighborhood Commercial	20	4.7%
Single Family Existing Residential	11	2.5%
* United Veterans Club (no proposed changes)	10	2.3%
	429	100%

* **NOTE:** This plan does not recommend any changes to the United Veterans Club property.

Proposed Land Use by Percentage of Total Area



Connectivity

Transportation and land use are interconnected, and therefore, must be planned in accordance with each other to ensure a connected and vibrant variety of uses within the project area. Each mode of transportation, including bikes, pedestrians, public transit, and vehicles, must be carefully considered and planned for as development occurs.

This is especially relevant as the project area is (partly) envisioned as a regional recreational destination, which must be accessible and safe for all users. On the other side, the project area will become a mixed use commercial and educational area. Business is often attracted to areas with a strong pedestrian focus and that are clearly accessible, as such an environment is all the more enticing to an employee.

The Connectivity Framework specifically considers the needs of pedestrians, bicyclists, and vehicles and recommends multiple improvements to better design for a walkable, bike-able, mixed use area. As the public transportation system further develops in Grand Island, public transit stops should be integrated into the project area, as well, where demand exists.

For a description and precedent imagery of the items highlighted in the Connectivity Framework, review the Master Plan Details.

Connectivity Framework



Utilities and Infrastructure

Utility improvements, while costly, can dramatically alter the functionality and physical characteristics of an area. Such improvements, with the appropriate capacity to serve the desired development, will be necessary within the project area through implementation. The following sections detail these necessary improvements.

Water Distribution System

The existing water system is sufficient to serve any development that may occur throughout the project area. Additional crossings at the railroad tracks will not be necessary. As the project area develops, water main loops should be constructed along the road right-of-way. Water main sizes should be 10 inches to 12 inches in diameter, and fire hydrant spacing should be approximately 500 feet.

Sanitary Sewer System

Extending the 18-inch sanitary sewer trunk line along Broadwell Avenue under the railroad tracks will need to be the first priority for extension of the sanitary sewer system. Once under the railroad, this trunk line should be routed west through the development within the street right-of-way. Pipe sizes can be decreased as the sewer extends from the east side of the development to the northwest. Trunk line sizes are estimated to be between 8 inches and 12 inches in diameter. South of the railroad, the existing 12-inch sanitary sewer service stubs along Capital Avenue can be utilized to serve this area.

Electrical Utility Service

The project area is large and will likely require an additional 13.8 kV full capacity distribution line splitting the project area with 200 amp branch lines splitting off. Future electrical lines should be run underground in the proposed street right-of-ways to serve the development. Proposed roadways should have street lights that follow Grand Island's standard cross sections.

Storm Sewer System

Existing storm sewer systems surrounding the project area are operating at or near capacity. To offset the increased demand for storm sewer associated with future development, additional storm water storage needs to be planned. Expanding Eagle Scout Lake accomplishes this need for the portion of the development north of the railroad. This lake expansion will not only provide some of the needed storm water storage, but will also serve as additional recreational facilities within the development. Additional storm water storage is also planned south of the railroad near Webb Road. This detention will help slow the storm water runoff from the cemetery portion of the development.

The City of Grand Island owns a tract of land north of Highway 281. This parcel of land is perfectly located to be developed in to a large detention cell similar to Eagle Scout Lake that can help manage stormwater from Moore's Creek drain way. Not only will the project area benefit from additional detention, but excavations from the proposed cell may also be used for fill throughout the project area.

It is anticipated that the developed area will be served by reinforced concrete storm sewer pipe ranging in size from 15 inches to 36 inches in diameter. These storm sewer pipes along with curb and area inlets should be constructed within the street right-of-way and should outlet into the proposed storage/detention areas. An additional storm sewer crossing under the railroad may be necessary toward the center of the project area to connect the South Subarea to the expanded Eagle Scout Lake.

Master Plan Details

To provide an additional level of detail each annotated master plan feature is described and illustrated through the use of precedent imagery on the following pages.

Proposed Improvements/Uses

- A** Boathouse / Restaurants
- B** New / Expanded Parking
- C** Existing Baseball / Softball Fields
- D** Splash Park (in progress)
- E** Youth Ballfields (in progress)
- F** Expanded Soccer Complex
- G** Fieldhouse
- H** Neighborhood Commercial Land Use
- I** Technology / Flex Land Use
- J** Pedestrian Overpass
- K** Business Park Land Use
- L** Existing Single Family Residential Land Use
- M** Mixed Use (Office / Dining) Land Use
- N** Amphitheater / Entertainment Area
- O** Community Center
- P** Active Open Water Recreation / Lake Expansion
- Q** Monument / Central Commons
- R** Innovation Campus Land Use
- S** Veterans Cemetery Expansion
- T** Historic Veterans Home Campus
- U** United Veterans Club
- V** Linear Water Park
- W** Local Heroes Trail System
- X** Water Feature
- Y** Site Entry Monument / Drive
- Z** Lake Boulevard
- AA** Lake Overlook
- BB** Natatorium

Annotated Veteran's Legacy Project Master Plan

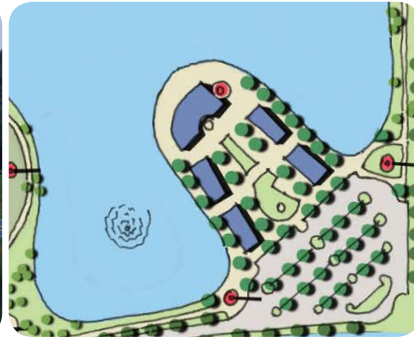


A Boathouse / Restaurants

A boathouse with nearby fine dining restaurants will activate the northeastern corner of the project area and serve as a welcoming, quality gateway into Grand Island. The boathouse should be oriented toward the expanded Eagle Scout Lake and integrate multiple public gathering spaces along the water and trail system. Canoes, paddleboats, and kayaks should be available for rent by the public at the boathouse. As such, the boathouse site should include docks for easy public access to the water.



Image Credit: The Knot



B New / Expanded Parking

New and/or expanded parking should be strategically located and designed. Parking lots should not be open seas of asphalt; rather, curbed landscaped islands should be installed at the ends of each row of brightly painted parking stalls. Curb cuts should be installed in the islands, to allow for stormwater conveyance and improved water quality through vegetation filtering. Parking lots should be screened from public view along all roadways through the use of landscaping, berms, hedge plantings, and shrubs. Clearly marked or parking island pedestrian pathways should be provided within large parking lots for safety.



Image Credit: The Fair Hope Times

C Existing Baseball / Softball Fields

The existing baseball / softball fields within the Veterans Athletic Complex should be properly maintained and updated when necessary in order to remain a regional destination. The fields are currently being connected with a pedestrian walkway on the west to the new youth ball fields, in line with the Veterans Sport Complex Master Plan. Site furnishings, including lighting, should be consistent throughout the entire Veterans Athletic Complex. Long range tournament complex upgrades include the addition of warning tracks in the playing field area and enhancing the sidewalk entry from the south parking lot.



Image Credit: The City of Grand Island, Nebraska

D Splash Park (in progress)

A splash park, currently under construction, will be located centrally within the Veterans Athletic Complex. Splash parks are recreational areas designed for interactive water play and do not have open basins of standing water. The splash park will be integrated with a variety of colorful in-ground and aboveground features, including sprays, squirts, mists, dumps, shoots, and water "sheets." The splash park will provide a family friendly activity, specifically for younger children during sporting events.



Image Credit: JTV

E Youth Ballfields (in progress)

Six new youth softball / baseball fields are currently under construction as part of the Veterans Athletic Complex phase two expansion effort. These ball fields should be properly maintained in order for the Complex to remain and grow as a regional destination. The fields should be connected into the proposed trail system, to ensure all destinations are connected within the project area. The new fields should be developed in line with the Veterans Sport Complex Master Plan, with a keen focus on landscaping enhancements and shade structures. Site furnishings, including lighting, should be consistent throughout the entire Complex.

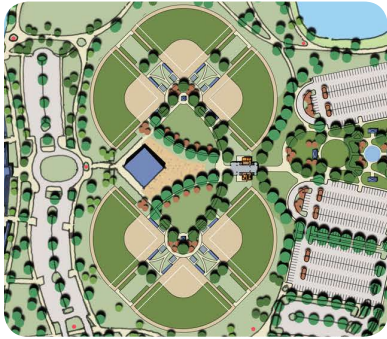


Image Credit: Sports Planning Guide

G Fieldhouse

A new community fieldhouse with flexible multipurpose sports courts should be constructed within the Veterans Athletic Complex to provide space for indoor recreational activities, such as basketball, volleyball, soccer, or rock climbing, that can take place throughout the year. The fieldhouse should be large enough to host regional-level sports tournaments to enhance the Veterans Athletic Complex as a destination. The fieldhouse should be well integrated into the site, through convenient vehicular and pedestrian access, and the building should architecturally complement the community center.



Image Credit: Archinect



F Expanded Soccer Complex

Six new soccer fields and four new futsal fields will be constructed directly south of the existing baseball / softball fields. The new soccer complex should be developed in line with the Veterans Athletic Complex Master Plan, and allow adequate space for regional tournaments. The proposed trail system should wrap around the soccer fields, allowing for pedestrian access from all sides. This expanded design would be a regional tournament style upgrade to the existing soccer complex already in use in this location.



Image Credit: Visit KC



H Neighborhood Commercial Land Use

Four neighborhood commercial areas are proposed. Examples of appropriate formats include fast casual dining options, professional office space, or small-scale retailers or service providers (i.e., pharmacies, banks, convenience stores, etc.) within small commercial centers or standalone buildings. Buildings should be constructed with quality materials and oriented toward the roadway and have welcoming and defined entrances, articulated facades and roofs, highly transparent store fronts, and landscaping (at the base of buildings and within the parking lots). Parking should be located to the side or rear of the building(s) when possible.



Image Credit: Ziegler Cooper Architects

I Technology / Flex Land Use

Technology / flex land uses should be located along the southern border of the North Subarea. Appropriate building sizes and formats include one to three story buildings, oriented as a small-scale campus or business park, utilizing shared parking and access drives. With this set-up, this land use can accommodate large or small employers. A wide variety of uses are permitted, including medical, research, or technology. High intensity industrial uses are not suggested due to the use's proximity to residential and recreational uses. Building and site design (materials, parking, lighting, and connectivity to surrounding uses) must be considered.



Image Credit: St. John Properties

K Business Park Land Use

A high quality, amenity-rich corporate business park should be located within the western section of the North Subarea to take advantage of the access to main roadways and the highway and interstate system. This land use is similar to Technology / Flex in that it can accommodate large and small employers, but differs in the fact that the buildings should be primarily multi-story (less than four). Large-scale industrial or residential uses are inappropriate; this land use should serve commercial (mainly office) purposes. Buildings should be architecturally complementary and oriented toward the water, with access to the trail system.



Image Credit: Oxford Business Park

J Pedestrian Overpass

A pedestrian overpass connecting the North and South Subarea should be constructed to link the innovation campus to the larger commercial uses in the North Subarea. The overpass will mitigate connection concerns caused by Old Highway 2 and the railroad. The pedestrian overpass should be ADA accessible and visually appealing. The overpass design should encompass the desired quality and character of the project area. The overpass will practically and safely link the neighborhoods south of Capital Avenue to the proposed active recreation community center by way of the proposed trail system.



Image Credit: Google Earth Pro



L Existing Single Family Residential Land Use

No changes to the current residences are proposed in this master plan. Though, to maintain compatibility, the residences should be buffered through landscape and architectural screening as the business park parcels to the east develop. The homes should be maintained properly, as they act as a transition from rural to urban uses and as an entrance to Grand Island. If the existing residences were to experience disinvestment, development of higher density residential for employees within the project area or an expansion of the business park to the east would be appropriate in this area.



Image Credit: Google Earth Pro

M Mixed Use (Office / Dining) Land Use

Mixed (office / dining) uses should be located in the central area of the North Subarea, oriented toward and around the lake. This use should take advantage of the proximity to the lake by providing multiple pedestrian water access points, multiple outdoor public gathering areas with views of the water, and highly transparent buildings. The mixed use buildings of varying scales (dining on the first floor and office on upper floors), walkable environment, and adjacent recreational opportunities will heighten quality of life, activate the project area day and night, and provide high quality professional office space and dining variety to Grand Island.



Image Credit: Gresham Smith

O Community Center

A community center should be constructed in the central area of the North Subarea. The community center building and site should be architecturally appealing through facade and roof articulation, high transparency, proper lighting, and environmentally-sensitive landscaping. The community center should provide a variety of uses, such as exercise facilities, community multi-use rooms, office and programming space, restrooms, a community kitchen, and an outdoor event space. The community center should be “home base” for the larger recreational area, with staff providing information on recreational opportunities, rentals, and events.



Image Credit: Social Work Degree Center

N Amphitheater / Entertainment Area

A new amphitheater should be terraced into the hillside from the roadway to Eagle Scout Lake. The terraces should have built-in bench style seating, accessible paths and stairways, and a raised platform. The amphitheater should be oriented toward Eagle Scout Lake, providing a natural, appealing backdrop for events. The amphitheater should be surrounded by environmentally-sensitive landscaping to provide greenery and color throughout the year and be near to the mixed use (office / dining) area that could include restaurants with patios overlooking the lake, small-scale retailers, and hotel accommodations (if demand arises).



Image Credit: BDC Network

P Active Open Water Recreation / Lake Expansion

Eagle Scout Lake should be expanded to two large open water areas connected by a narrower waterway and two smaller open water areas. Pedestrian bridges should be constructed over the narrow waterways to connect the trail system. Various water access points should be provided to allow users to load their kayaks, canoes, paddleboats, and more into the water. Primary access points should be located at the community center and boathouse. Narrow streams of water should flow from Eagle Scout Lake to the linear water park in the South Subarea and to Moore's Creek on the northern boundary of the project area.



Image Credit: Old Town Canoe

Q Monument / Central Commons

A monument honoring veterans and their service should be constructed in the center of the innovation campus, within the middle of a “central commons” to ensure visibility from all angles. As such, the monument should be visually appealing from all sides, properly lit (lighting equipment hidden from public view), and structurally sound. Pedestrian walkways should lead to the monument. The monument should be surrounded by various plantings that provide greenery and color throughout the year. Site furnishings, including benches and trash and recycling receptacles should be provided to allow users time to relax and reflect.



Image Credit: City of Green, Ohio



S Veterans Cemetery Expansion

This master plan fully incorporates the Veterans Cemetery Master Plan. This cemetery should serve the needs of veterans, as well as community members. The Veterans Cemetery Master Plan acknowledges the growing need for community cemetery space, but ensures a buffer from the surrounding residential and campus uses through the use of dense tree lines and clear cemetery entry points. The proposed lake within the Veterans Cemetery should be connected to the proposed linear water park and as part of the overall site stormwater system.



Image Credit: Veterans Cemetery Master Plan

R Innovation Campus Land Use

An innovation campus should be located in the South Subarea, west of the historic Veterans Home campus. The innovation campus can fill multiple community needs. Therefore, it should provide smaller office suites (within a larger building), for start-ups, co-working, or community programming and education. An educational campus, with a focus on math, science, or information technology, would also be appropriate, and could be an expansion area for the potential educational campus to the east. This campus should be walkable and tie into the North Subarea by way of the pedestrian bridge.



Image Credit: Evolo

T Historic Veterans Home Campus

The historic Veterans Home campus buildings and general layout should be preserved and reused as a (1) community education and programming center or (2) a postsecondary educational campus. A community education and programming center could provide specialized skills/trade training for veterans and interested community members. A small annex campus of a larger university specializing in next generation professions would be a suitable use as well. The Career Pathways Institute trains students in a variety of trades and is an example of the type of educational facility that could be expanded on the historic campus.



U United Veterans Club

No changes are proposed to the United Veterans Club building or site. This building functions as a community gathering space and should be properly maintained and buffered from incompatible uses. If it will exist in the future, various building and site improvements could enhance the visual appeal and serve to modernize the building and site. These enhancements could include parking lot islands, landscaping along the right-of-way, base landscaping along the building, and an updated wall and monument sign, though such enhancements are not part of this master plan.



Image Credit: Google Earth Pro

W Local Heroes Trail System

A “Local Heroes Trail System” should be constructed to link points of interest, including the community center, fieldhouse, amphitheater, boathouse, sports fields, and the innovation campus (by way of the pedestrian overpass). The trail system should run alongside the expanded Eagle Scout Lake and feature various scales of monuments (shown as red dots) that recognize and educate on veterans’ service or Grand Island and/or regional heroes. The trail should be paved (with an environmentally-friendly and sustainable surface) and 10 feet wide to permit space for pedestrians and bicyclists.

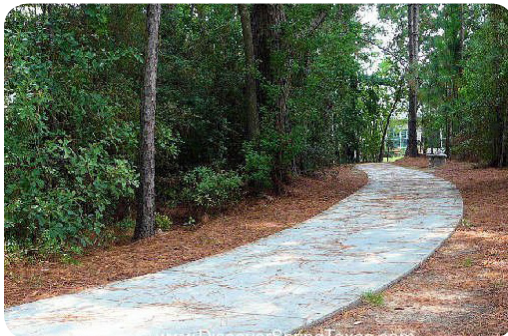


Image Credit: Discover Spring Texas



V Linear Water Park

A linear water park should be created along the northern boundary of the South Subarea, and accessible from the expanded cemetery. The linear park should include a trail parallel to the small stream and be shaded by dense tree cover to allow for pleasant recreation and to block road noise from the adjacent Old Highway 2 and railroad. Benches and trash and recycling receptacles should be placed along the trail. The trail should connect back to the sidewalk system within the cemetery, as well as to the pedestrian bridge.



Image Credit: Proto Photo

X Water Feature

Water features should be included in the proposed Eagle Scout Lake expansion with the goal of water movement (for the health of the lake) and visual appeal. The water features should vary in scale and design (i.e., different numbers and heights of water columns), but should be of such a height that is easily visible, specifically from the boathouse / restaurant, amphitheater, and mixed use (office / dining) buildings. It is important that the water features not be exposed to high winds. In general, the height and “throw” radius of the jets should not be higher than the distance between the nozzle and the nearest edge of the lake.



Image Credit: KC Fountains

Y Site Entry Monument / Drive

Three major site entry points are proposed in the North Subarea, and one in the South Subarea. These entries should be accented with large decorative monument signs, constructed of masonry and surrounded by colorful plantings. The entry drives should be separated by a landscaped median, complete with trees, attractive groundcover, and shrubs that provide for color throughout the year.



AA Lake Overlook

A lake overlook should be incorporated into the Local Heroes Trail System north of the existing ball fields and integrated with a new expanded parking lot. The overlook should include a raised deck with safety railing directly off of the trail system. The overlook should be furnished with picnic tables, benches, small covered pavilions, and/or trash and recycling receptacles to allow for gatherings, such as a parties. The overlook should tie into the planned veterans' monument.



Image Credit: Positively Potts Town



Z Lake Boulevard

A "lake boulevard" should be constructed as the new primary roadway through the North Subarea. The boulevard should begin at the west entry monument, head east, and then gently curve to the north Airport Road entry monument. The roadway should be wide enough to incorporate a landscaped median along its entire length, include bike lanes and street trees, and have a speed limit of no greater than 30 miles per hour to ensure the safety of pedestrians and bicyclists. The roadway should take advantage of adjacent water, providing overlooking views of the water features. Two roundabouts should be incorporated into this roadway, as well.



Image Credit: Sharper Homes

BB Natatorium

A natatorium should be built to provide space for various indoor swimming activities, including competitions in different sports (swimming, diving, water polo, etc.) of different levels and recreational and therapeutic swimming. The natatorium should be designed to meet the needs of the determined user base, though a competition regulation pool should be constructed to continue to grow the project area as a regional recreational destination. The natatorium should feature convenient vehicular and pedestrian access by constructing a new parking lot and the building should architecturally complement the community center and fieldhouse.



Image Credit: Breslin Architects



5.0

Implementation

Grand Island has the opportunity to create a quality, amenity-rich, mixed use center and a recreational hub that serves as a welcoming gateway into the community. To take full advantage of the land conveyance by the State, Grand Island must personally invest and guide private investment in the project area through policies and projects that support the defined vision for the project area. Implementation of the Veteran's Legacy Project Master Plan will occur incrementally, as various projects are undertaken individually. The following implementation plan outlines these policies and projects that must work in concert to achieve the set forth vision.

An implementation plan provides recommendations to help City staff members, stakeholders, and elected officials make long- and short-term decisions to complete the master plan. The implementation plan provides insights on decision making, funding, marketing and communications, budget estimates, phasing, and priority projects. With these insights, the implementation plan can be used as a daily reference tool to evaluate projects to be constructed, their costs, their timing, their importance, and the evaluation of new projects not contemplated or included in the master planning process.

The four following overarching elements should be kept in mind when implementing the plan:

- **Day-to-Day Use**

The Veteran's Legacy Project Master Plan should be used on a day-to-day basis, as the official policy guide for land use, development, reuse, and reinvestment in the project area. The plan should be regularly consulted by elected officials and City staff members to review and evaluate proposals for improvement and development within the project area. Further, Grand Island's various service providers, community organizations, and institutions should utilize the plan to guide facilities, infrastructure, and programming as it is related to the project area.

- **Cooperation and Collaboration**

Complete implementation of the plan will require a high level of trust, cooperation, and focused attention between the private sector, community members, stakeholders, elected officials, and City staff members—all whom must advance the plan together. Though, the City should be the leader in promoting this cooperation and collaboration to implement the plan. The City should actively work with and encourage developers and the business community to undertake improvements set forth in the plan.

- **Communication and Education**

The planning process for the Veteran's Legacy Project Master Plan has facilitated a considerable amount of public and stakeholder outreach through in-person events and a website, keeping community members involved and informed of the plan's development. Building on these efforts and to ensure that community members understand the plan's recommendations and the future vision for the project area, the plan should be made available online for free. Hard copies of the plan should be available at City Hall and the Grand Island Public Library. If questions arise, contact information should be available alongside the online and paper versions of the plan. Additionally, major milestones should be covered in the media.

Equally important is the education of newly elected officials. A full review and explanation of the plan and its current stage of implementation should be provided to each newly elected official.

- **Regular Review and Update**

The plan is a foundational document, as it contains recommendations that were made at the time of its creation based upon existing conditions, market analysis, and stakeholder and public input. This planning process set a clear direction for the future of the project area. Though, it is important to acknowledge that the plan cannot anticipate all of the unforeseen changes that could occur in the City's finances; the local, regional, and national economy; construction practices, or even social changes. The plan must be nimble and able to react to these changes; the plan must be a "living document." A living document can and should be continually reviewed, edited, and updated to meet the changing needs of the City. The plan provides overall direction and goals, but its relevance must be verified continually.

Although a proposal to update the plan can be brought forth at any time, the City should regularly undertake a systematic review of the plan every two to three years. This review should align with the preparation of the annual City budget and the Capital Improvement Plan. That way, recommendations in the plan can be incorporated as an upcoming commitment for the next fiscal year.

Next Steps

Section 5.0 Implementation outlines dictates a clear strategy for moving the plan forward into reality. This section includes three general next steps, which should be started immediately to achieve visible gains and create a strong atmosphere capable of development as opportunities arise. The steps are as follows:

1. Align City Policies and Regulations
2. Prepare Additional Planning, Design, and Engineering Documents
3. Complete Priority Projects

A time frame, responsible entity, and cost impact are provided for each implementation task. These items are explained as follows:

- **Time Frame:** A general time frame is provided for each implementation task. Generally, low-cost strategies with simple implementation steps are planned for the immediate future.
 - *Immediately* - (Start within 1 year) Low cost, ease of implementation, directly advances other strategies, or addresses critical issues
 - *Short-Term* - (1-5 years) Fairly significant costs, but with planning can be implemented within this time frame
- **Responsible Entities:** Responsible entities are assigned to each of the implementation tasks. The identified organization, entity, or department is either currently involved with similar projects or possesses the capability and/or authority to implement such strategies. The City, specifically the Regional Planning Department and City Council, will likely be involved in a majority of the implementation tasks. Outside expertise, such as consultancies skilled in planning, engineering, and design will also be necessary.
- **Ease of Implementation:** The ease of implementation is indicated by a grade scale from “A” to “C.” This category is a collective indicator of the anticipated level of effort by City staff members, property owners, partnering agencies, cost and budget considerations, and general stakeholder desire.
 - *A* - Tasks that require policy changes or partnerships with limited outside funding requirements and can largely be done in-house
 - *B* - Tasks that require relatively affordable consulting services, infrastructure improvements, and/or multi-agency coordination
 - *C* - Tasks that require high levels of planning, engineering, or design and infrastructure expansion with significant investment

Align City Policies and Regulation

The following summarized administrative and regulatory actions should be completed by the City within the proposed time frames with full assistance of the identified responsible entities. In general, these changes can be completed in a short time frame and rely on little funding allocation.

Adopt the Master Plan

The Veteran's Legacy Project Master Plan should be adopted by the Grand Island City Council as the City's official policy guide for land use, development, and capital improvements within the project area. It is essential that the plan be used by City staff members when reviewing and evaluating all proposals for improvement within the project area. This document should be adopted as a subarea plan.

Time Frame: Immediately
Responsible Entities: Regional Planning Department, Regional Planning Commission, City Council
Ease of Implementation: A

Amend Relevant Ordinances and Plans

Once the Veteran's Legacy Project Master Plan is adopted, the City should conduct a full review of the City's current development controls, including zoning, subdivision regulations, and other related codes and ordinances. It is critical that all development controls are consistent with and complement the Veteran's Legacy Project Master Plan. Following the review, the City should amend affected ordinances and plans so that they align with the vision and recommendations of this plan and to ensure the City's existing development regulations do not restrict desired uses and improvements within the project area. The update process should include a review of the following documents, but is not limited to:

- Grand Island Comprehensive Development Plan (2004)
- Figure 13B Future Land Use Northwest Quadrant, located in Grand Island Comprehensive Development Plan (2004)
- Chapter 36 Zoning Regulations, located in Grand Island City Code
- Generalized Zoning Map
- Capital Improvement Plan (2017-2022)

Time Frame: Immediately
Responsible Entities: Regional Planning Department, Regional Planning Commission, City Council
Ease of Implementation: A

Prepare Additional Planning, Design, and Engineering Documents

The following plans, studies, and guidelines should be developed to further the recommendations of the plan. Many of the plan, studies, and guidelines will reference the Veteran's Legacy Project Master Plan, and as such, should be implemented in concert.

Develop Design Standards

A design standards document should be prepared for the entire project area to ensure the site is developed with quality and connectivity in mind. Design standards should be enforced through the creation of an overlay district, adopted as part of the official zoning code. The standards should detail requirements for architectural and site design, improvements within the public right-of-way, signage (wayfinding and site signage), and connectivity. Clear and highly illustrative standards will become increasingly critical as multiple developers and businesses inhabit the site. The design standards document should be used throughout the development review process.

The design standards document should be completed and adopted prior to the design of any new buildings, sites, or signs within the project area, as both the City-led improvements and private development should meet the same standards to ensure a unified character.

Time Frame: Short-Term
Responsible Entities: Regional Planning Department, Consultant, Public Works Department, Regional Planning Commission, City Council, Parks and Recreation Department
Ease of Implementation: B

Prepare a Strategic Business Recruitment Plan

The project area has the ability to support a wide mixture of uses and will become increasingly attractive as the recreational amenities are added. Therefore, these planned uses should be encouraged and incentivized to locate within the project area.

In order to take tactical steps toward attracting these businesses and necessary investors and developers, a strategic business recruitment plan should be developed. This plan will guide the City or a designated leadership body/director through promotional efforts.

The plan should detail methods to strengthen connections with the business and development community, while also bolstering the project area's image and appeal through the addition of recreational amenities, necessary infrastructure, and financial incentives. The plan should highlight the available land, planned amenities, the overall master plan concept, community buy-in, City support, and available work force and financial incentives in order to attract both local and out-of-market businesses, investors, and developers.

The plan's goal should be to create an environment that attracts high value, quality new business, fosters innovation and entrepreneurship, and encourages job growth by emphasizing the project area's and Grand Island's strengths, commitment, and preparedness. The plan should also outline various recruitment tools, including a website that could include a mapping system that details available development sites, featured properties, navigable site analysis maps, and incentive areas.

It is important that the plan target multiple industries by developing a comprehensive, flexible, and creative tool set. Examples of these tools development review fast-tracking or business counseling. Regulatory, physical, financial, and market-based incentives and resources should be paired to create cohesive, enticing strategies.

Time Frame: Immediately

Responsible Entities: Regional Planning Department, City Administration, Finance Department, Regional Planning Commission, City Council, Parks and Recreation Department

Ease of Implementation: B

Prepare a Promotional Campaign

To supplement this the strategic business recruitment plan, a promotional campaign should be undertaken. Strategic marketing and promotion is critical to the realization of the plan. As such, the promotional campaign should: (1) attract both local and regional visitors; (2) improve business and property owner confidence in the long-term future of the project area; and (3) act as a promotional tool for recruiting new business, investors, and developers.

As part of the promotional campaign, a coordinated effort is needed to clearly address the project area's image, brand, and marketing program. As the project area develops, this will become increasingly important, as outreach broadens to the region; the message must be controlled and united. Elements including the development's name, logo, correspondence materials, newsletters, social media, and website should all be coordinated and designed as a family of materials utilizing the same formats, logo, colors, and message.

Physical improvements should also be included in the campaign. These improvements will likely include uniform wayfinding, modern entry monuments, and more. These improvements must be bold, visible, and send a clear message of investment and vibrancy. Both these physical improvements and the nonphysical should be showcased through the use and maintenance of a project area website, social media platforms, and print material distributed through multiple communication lines. As previously mentioned, these materials must conform to the defined branding standards.

Finally, new development within the project area will likely be a hard sell to an uneducated public. As part of the promotional campaign, City staff members should create a targeted public education plan and welcome one-on-one discussions with community members. When the community understands the long-term benefits of added employment and recreational opportunities and a heightened tax base, they themselves will become champions of this plan.

Time Frame: Immediately

Responsible Entities: Regional Planning Department, Marketing Consultant, Public Works Department, Regional Planning Commission, City Council, Parks and Recreation Department

Ease of Implementation: B

Prepare a Utilities and Infrastructure Improvements Plan

Utility and infrastructure improvements, while expensive, will dramatically alter the project area's functionality and physical characteristics. Because the North Subarea is largely undeveloped, utility and infrastructure improvements are necessary to encourage development and investment. As such, a strategic utilities and infrastructure improvements plan should be created to guide the improvements and ensure they are adequate and appropriate.

The plan should be based first on the recommendations within the Utilities and Infrastructure section of Section 4.0 Master Plan and second, on additional utilities and infrastructure analysis and design. The plan should prioritize such capital improvements within the project area; it should align with the proposed phasing plan.

The detailed improvements should include designs and locations of water main loops, fire hydrants, sanitary sewer trunk lines, street lights, underground electrical lines, stormwater detention, and storm sewer pipes. In addition, the plan should clearly outline roadway and sidewalk and trail designs to ensure that the needs of pedestrians, bicyclists, and automobiles are safely met.

Time Frame: Immediately

Responsible Entities: Utilities Department, Public Works Department, Fire Department, Regional Planning Department, Consultant, Emergency Management Department, Regional Planning Commission, City Council, Parks and Recreation Department

Ease of Implementation: B

Conduct a Lake Expansion Feasibility Study

The proposed expansion of Eagle Scout Lake is a critical piece to the project's area's development and character. To ensure the complete viability of the lake expansion, the City should conduct a lake expansion feasibility study to determine the technical specifications of the lake's expansion and the required consulting services, engineering, construction, maintenance, and associated financial resources to make it a reality. The study should also detail the operations and management of the lake to gain a better understanding of the staff time and yearly resource allocations necessary to maintain the lake's health.

A cost/benefit analysis should be a part of the feasibility study, though it is important to note that while the lake expansion will provide the necessary fill to remove the developable parcels out of the regulatory floodplain, the ultimate purpose of the lake expansion is to create a recreational hub for the region and to increase users' quality of life, which can be difficult to quantify.

Time Frame: Immediately

Responsible Entities: Public Works Department, Regional Planning Department, Consultant, Regional Planning Commission, City Council, Parks and Recreation Department

Ease of Implementation: B

Prepare an Annexation Plan

Municipalities of the first class are allowed to annex any contiguous or adjacent lands, lots, tracts, streets, or highways that are urban or suburban in character per section 16-117 of the Nebraska State Statute. The current City limits are shown in the graphic below; the majority of the project area falls within the City of Grand Island already, while most of the western portion of the North Subarea does not.

The annexation plan should detail the resolution that states the City's intent to annex and plan for the extension of City services to the land. The time, date, and location of the public hearing regarding the proposed

annexation and a legal description of the proposed annexation land should also be included in the annexation plan. Furthermore, the plan should state (1) the estimated cost impact of providing the City services; (2) the method of finance and maintenance of the services; (3) the timetable for the extension of services; and (4) a scaled map delineating all boundaries in question and proposed and the proposed land uses.

The annexation plan should fully reference this master plan.

Time Frame: Immediately
Responsible Entities: Regional Planning Department, Utilities Department, Regional Planning Commission, City Council
Ease of Implementation: A



Complete Priority Projects

The following projects are recommended as priority projects for two reasons: they are either manageable and/or highly visible. Through coordination with various agencies, community groups, and the private development community, each project has great potential to excite community members and spur private investment.

It is important to note that the following projects have been designated as a priority due to their high visibility, the entities involved, or their ability to excite the community and build momentum, not because of their cost. Following the lake expansion, the priority projects are in no particular order.

1 Lake Expansion

The expansion of Eagle Scout Lake is perhaps the most transformative recommendation of this master plan. Throughout the engagement process, the importance of recreational opportunities was repeatedly mentioned. The lake expansion and associated trail system provides active and passive recreational opportunities not currently conveniently available to Grand Island residents, such as kayaking and canoeing.

It is important to note that the lake expansion will also provide fill to elevate the proposed development sites up out of the regulatory floodplain. Similarly, the lake expansion also will act as the initial stormwater management for the project area.

As a priority project, the lake should be expanded in full at one time, as shown in the phasing plan. As part of this expansion, the two proposed pedestrian bridges should be

constructed, as well as the part of the Local Heroes Trail System directly surrounding the proposed lake expansion. The remainder of the Local Heroes Trail System should be completed as funding permits.

Note that with a phased approach to the lake's expansion, its impact as an attractive business recruitment opportunity and recreational amenity will be limited.

Time Frame: Short-Term
Responsible Entities: Regional Planning Department, Utilities Department, Public Works Department, Fire Department, Consultant, Emergency Management Department, Parks and Recreation Department, Regional Planning Commission, City Council
Ease of Implementation: C

2 Boathouse

The boathouse will activate the northeastern corner of the project area and play an important welcoming role to the project area, and Grand Island as a whole. For this reason, it is critical that the boathouse's building, site, and signage design set the level of expected quality within the project area, including elements such as varied and preferred exterior building materials (i.e., masonry), interesting fenestration patterns and proportions, high transparency, complementary site furnishings, landscaped parking lot medians, defined pedestrian walkways, and more.

The boathouse should be constructed during the expansion of Eagle Scout Lake, and should take advantage of the water views by incorporating floor to ceiling windows in the building design when possible. In addition, a community deck should be constructed along the backside of the boathouse so that patrons can sit and enjoy the water views outdoors.

The boathouse should also include a kayak, canoe, and paddleboat rental area and water loading docks for recreational users. The boathouse should function as one of the primary water entry areas, alongside the community center.

To complement the boathouse, a community plaza with associated restaurant pads should be constructed between the boathouse and the new parking lot. This plaza should be made of stamped concrete or pavers and accented with landscape beds and site furnishings. The architecture of the restaurants should complement that of the boathouse.

A key consideration for this project will be the boathouse's maintenance and operations plan.

Time Frame: Short-Term

Responsible Entities: Building Department, Parks and Recreation Department, Regional Planning Department, Utilities Department, Public Works Department, Fire Department, Consultant, Emergency Management Department, Regional Planning Commission, City Council

Ease of Implementation: C

3 Fieldhouse and Natatorium

The City should work to identify a private developer for the proposed fieldhouse in order to provide indoor, year-round recreational space for community members and the region. The availability of indoor, tournament space will expand the recreational geographic draw for Grand Island. The fieldhouse should be privately developed, operated, and maintained.

The multi-purpose fieldhouse, shown at 100,000 square feet, should function as one part of the expanded Veterans Athletic Complex and be designed to handle both youth and adult casual and tournament-level events. At least eight indoor basketball courts, which can

be converted into 10 volleyball courts, should be included. The inclusion of a rock climbing wall, batting cages, an elevated running/walking track, and the ability to transform the courts into a turf area for soccer should also be considered.

Facilities such as restrooms, concessions, and administration offices should be provided within the fieldhouse.

To complement the fieldhouse, a natatorium, shown at 19,000 square feet, should be constructed directly north of the new community center to provide space for indoor swimming. It is recommended to construct a 25-meter pool with a diving well to accommodate most levels of swimming meets. Facilities such as concessions, restrooms, and locker rooms should be provided within the natatorium. The natatorium should be constructed by use of creative financing partnerships.

Both the fieldhouse and natatorium should be well integrated into the project area, with convenient vehicular and pedestrian access points, and the buildings should architecturally complement the community center and each other.

The wide variety of indoor sporting options provided within the project area will serve to activate the area all year round and act as a destination for regional patrons.

Time Frame: Short-Term

Responsible Entities: Building Department, Parks and Recreation Department, Regional Planning Department, Utilities Department, Public Works Department, Fire Department, Consultant, Emergency Management Department, Finance Department, Regional Planning Commission, City Council

Ease of Implementation: C

4 Pattern Book

As a priority, a signage and monumentation pattern book should be developed in order to not miss opportunities to unify the project area through complementary, high quality signage. A guide should be developed that directs the size and aesthetic of all signage types.

The preferred materials, dimensions, text font and size, lighting, base and buffer landscaping styles should each be detailed textually and graphically for each signage type. Signage types will include, but should not be limited to primary entry points, primary intersection signage, multiple sizes of monument signs, wall signs, and wayfinding signage.

The pattern book will not be regulatory in nature, though it will serve as a marketing tool for the project area, assuring the development community that a plan is in place and development and standards are high. The pattern book concepts and direction should be fully integrated into the signage section within the Design Standards, previously described.

Time Frame: Immediately

Responsible Entities: Regional Planning Department, Public Works Department, Consultant, Regional Planning Commission, City Council

Ease of Implementation: B

5 "H" Pad Site Preparation and Marketing

The Neighborhood Commercial "H" pad site should be prioritized and readied for development due to its manageable size and location. Given the planned and currently expanding recreational uses in close proximity, this pad site should be developed as support commercial, likely as a fast casual dining option or a small-scale retailer or service provider (i.e., pharmacy, bank, convenience store, or gas station). Uses such as these will begin to activate the project area, requiring little/first phases of infrastructure.

The City should construct the necessary infrastructure to access the pad site and prepare the site for development by placing fill, completing rough grading, and ensuring sewer and water hook-ups are in place.

To market the site, the City should promote the site via the City website, consider an incentive package, and develop inroads with the development community. As an incentive, a preliminary site plan concept could be developed.

The buildings should be constructed with quality materials, be oriented toward the roadway, and have welcoming and defined entrances, articulated facades and roofs, highly transparent store fronts, and landscaping (at the base of buildings and within the parking lots). Parking should be located to the side or rear of the building(s) when possible.

Time Frame: Short-Term

Responsible Entities: Regional Planning Department, Public Works Department, Utilities Department, Finance Department, Consultant, Regional Planning Commission, City Council

Ease of Implementation: B

6 Quiet Zone Establishment

As a relatively simple method to increase the project's area attractiveness to developers, the City should work with the Federal Railroad Administration to establish a quiet zone for both at-grade railroad crossings within the project area (Broadwell Avenue and Webb Road).

Under the Train Horn Rule, locomotive engineers must start to sound train horns at least 15 seconds in advance of all public grade crossings. While a necessary safety precaution, the horn can act as noise pollution, limiting the site's attractiveness to developers. Without undertaking a massive infrastructure investment, such as that associated to the construction of an elevated crossing to eliminate this noise pollution, Grand Island should establish a new quiet zone.

Regulations and instructions related to this endeavor are located on the Federal Railroad Administration's website (<https://www.fra.dot.gov/eLib/Details/L03055>). It is important to note that a new quiet zone must (1) be at least one-half mile in length along the railroad tracks and (2) have, at a minimum, flashing lights and gates in place at each public crossing. These crossings must also be equipped with constant warning time devices and power out indicators.

Time Frame: Short-Term

Responsible Entities: Regional Planning Department, Public Works Department, Utilities Department, Finance Department, Consultant, Regional Planning Commission, City Council

Ease of Implementation: A

7 Existing Residential Buffer

While the business park land use will likely not begin implementation until Phase 7, it is critical to begin widening and densifying the tree line between the future business park land uses and the existing residences along the eastern boundary of the project area within the first year to ensure adequate growth between the dissimilar uses.

The existing tree line is not seamless; the agricultural land planned for business park land uses is visible from several of the existing residences.

Multiple benefits arise from widening and densifying the tree line, including tree protection, preservation, and enhancement, as well as a strengthened shield to block potential light or noise. Trees themselves provide a wide variety of benefits to communities, such as cleaner air, increased oxygen levels, and decreased soil erosion.

It is important that the tree line visually and audibly block the business park development year-round. As a general rule, tree species chosen for screening purposes should reach a mature height of at least 20 feet.

Time Frame: Immediately

Responsible Entities: Regional Planning Department, Parks and Recreation Department, Public Works Department, Utilities Department, Regional Planning Commission, City Council

Ease of Implementation: A

8 Project Marketing Package

To begin educating the development community about the master plan and coming public improvements, the City should develop a complete marketing package. This package should align with the promotional campaign and strategic business recruitment plan, utilizing the same branding, logo, format, and message, though its target audience should be the development community.

Therefore, the marketing package should focus on the master plan itself, available development sites, planned infrastructure improvements, potential available incentives, and the pattern book. The marketing package should be developed for the ultimate purpose of recruiting new business, investors, and developers. In essence, the marketing package should be an easily distributable packet that fully describes the master plan, its intent, time line, and ways to get involved and invested in the project.

The marketing package should be available online and in print, and distributed through multiple communication lines. The marketing package should be created as part of the strategic business recruitment plan.

Time Frame: Immediately

Responsible Entities: Regional Planning Department, City Administration, Finance Department, Regional Planning Commission, Consultant, City Council, Parks and Recreation Department

Ease of Implementation: B



Project Coordinator *Strategic Hire*

As a final note, the City should consider employing a project coordinator for the Veteran's Legacy Project Master Plan. The project coordinator's primary responsibility would be to advance the plan's recommendations. This person should have significant economic development and organizational leadership experience. The project coordinator would take direction from the Regional Planning Department, City Council, or City Administration and present updates, budgets, and ongoing projects related to the Veteran's Legacy Project Master Plan at City Council meetings.

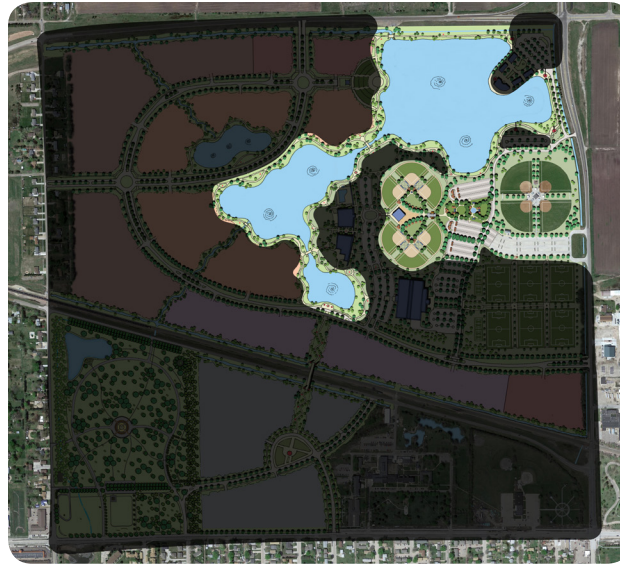
Without a project coordinator, ownership of the plan will be limited to current City staff member time and resources.

Master Plan Phasing

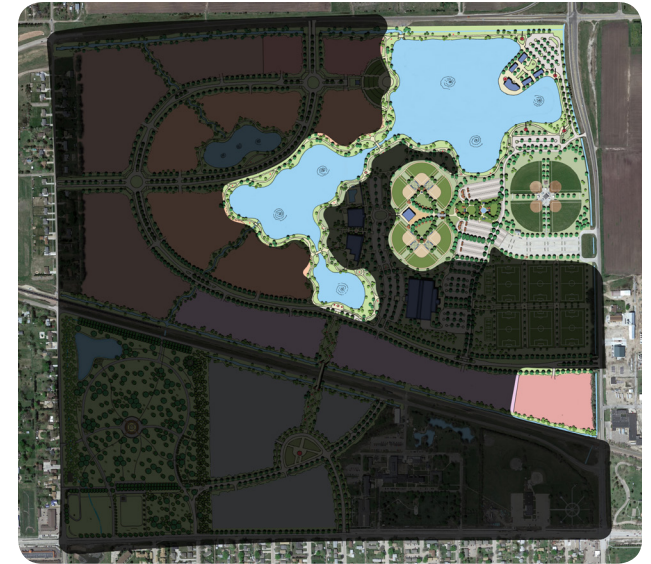
The following phasing graphics demonstrate the order in which the project should be implemented. The phasing graphics should be reviewed in line with the probable cost information that follows this section in order to understand the financial considerations associated to each phase.

It is important to note that Eagle Scout Lake should be fully expanded in the first phase. The lake expansion project plays a critical role in the master plan, serving as both an amenity for surrounding development and as a regionally-used recreational opportunity. Earthwork from the lake expansion also creates developable land, as described in the master plan.

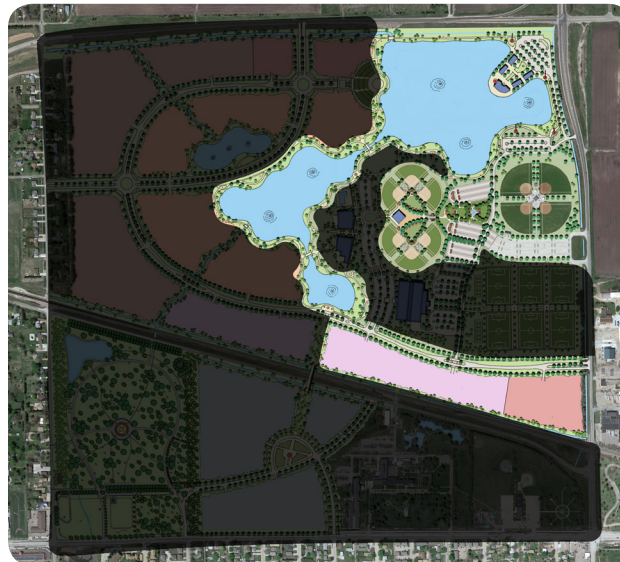
In general, the phasing follows the construction of the new roadway, starting at the new proposed entry point to the North Subarea along Broadwell Avenue. Sites should be developed along both sides of the new roadway as it moves to the west, north, and back to the east.



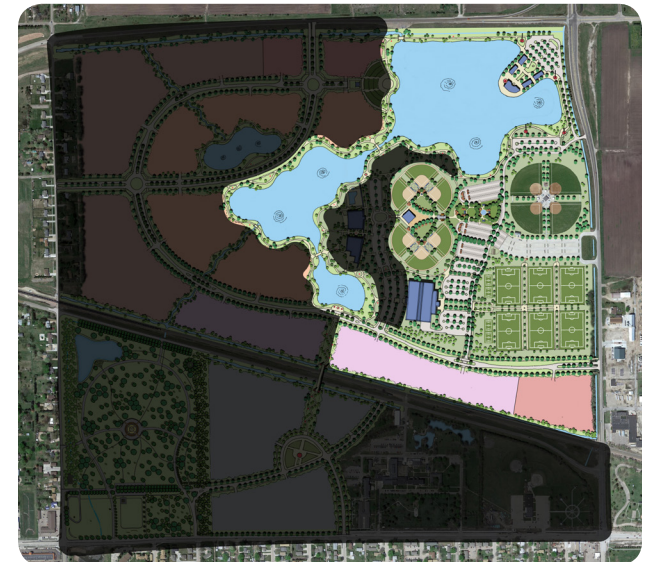
Phase 1



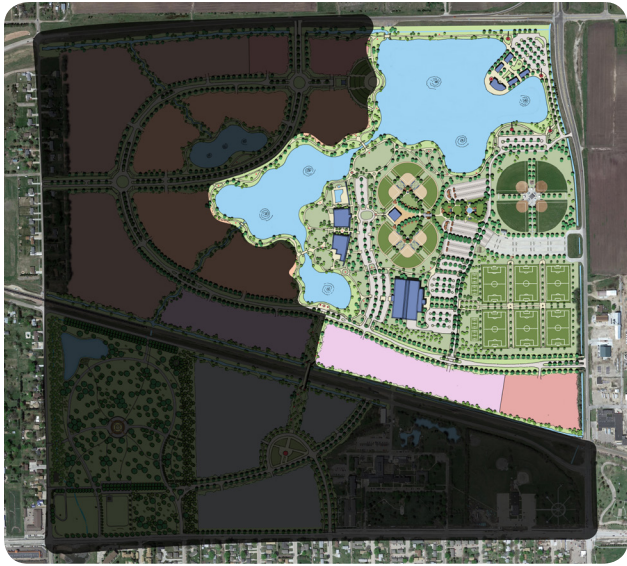
Phase 2



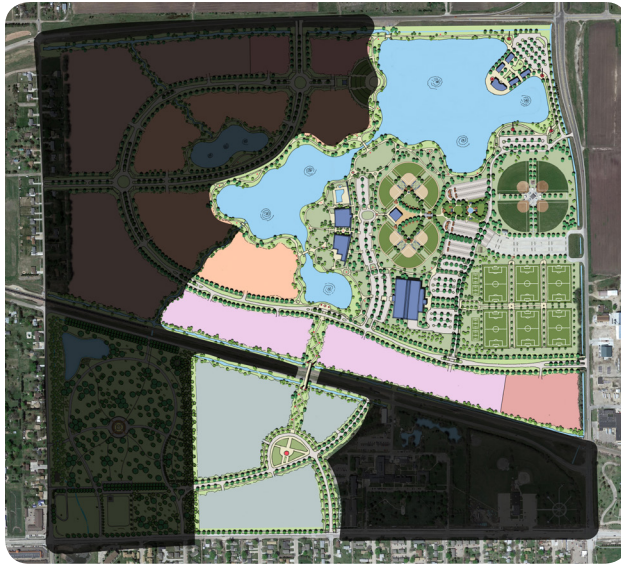
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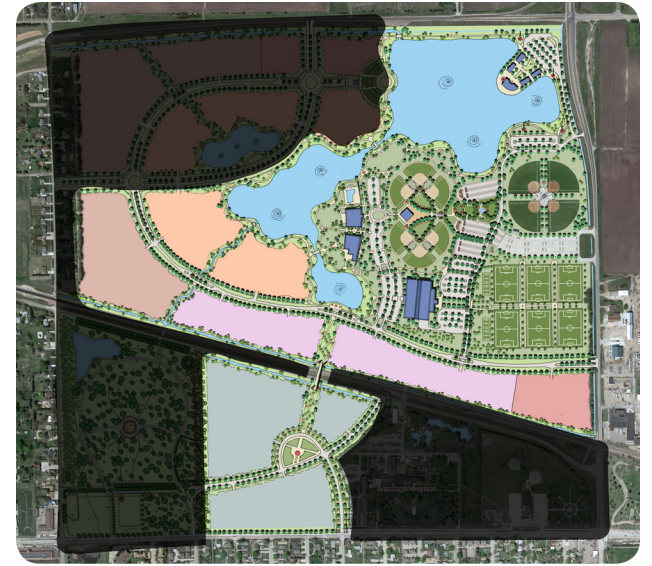
Phase 4



Phase 5



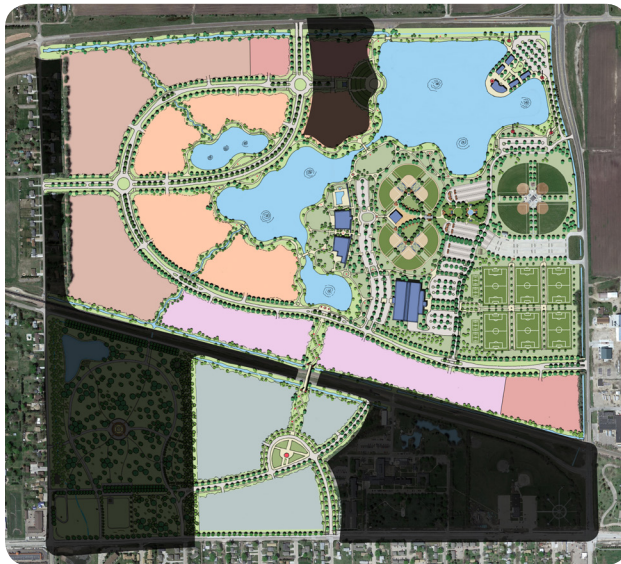
Phase 6



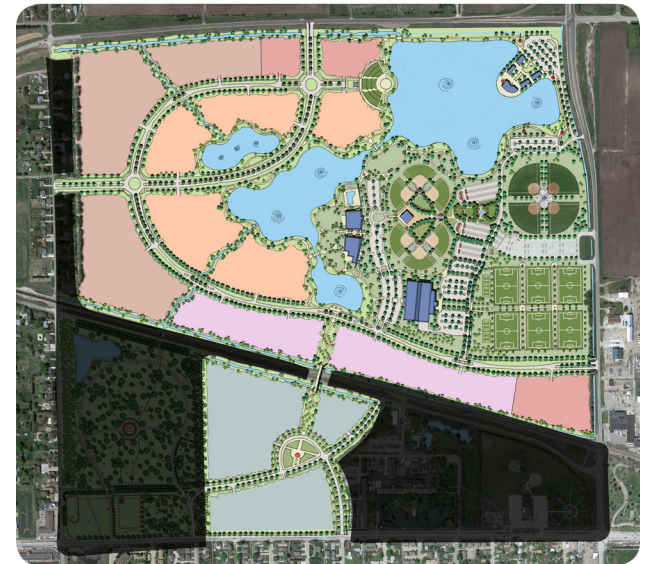
Phase 7



Phase 8



Phase 9



Phase 10

Opinion of Probable Cost

Preliminary opinions of probable cost for the proposed and primarily public improvements are provided, broken down by each of the 10 phases.

Only construction costs are provided; the costs that follow do not include soft costs, including professional fees, testing, permits, or furnishings. All costs are in 2017 dollars.

<i>Description</i>	<i>Quantity</i>	<i>Unit</i>	<i>Unit Price</i>	<i>Total</i>
Phase 1				
Existing Baseball Fields	Existing	Existing	Existing	-
Ballfields	Under Contract	Under Contract	Under Contract	-
Ballfield Parking	Under Contract	Under Contract	Under Contract	-
Splash Park	Under Contract	Under Contract	Under Contract	-
Lake Expansion	800,000	CY	\$8.00	\$6,400,000.00
Local Heroes Trail System	5,500	LF	\$60.00	\$330,000.00
Water Features	1	LS	\$250,000.00	\$250,000.00
				\$6,980,000.00
Phase 2				
Boathouse / Restaurants / Plaza and Utilities	1	LS	\$20,000,000.00	\$20,000,000.00
Boathouse Parking	9,600	SY	\$70.00	\$672,000.00
Sanitary up to Boathouse	5,000	LF	\$85.00	\$425,000.00
Site Entry / Drive	455	LF	\$450.00	\$204,750.00
Public Roadway and Utilities	285	LF	\$400.00	\$114,000.00
Lake Overlook	1	LS	\$100,000.00	\$100,000.00
Lake Overlook Parking	5,000	SY	\$70.00	\$350,000.00
				\$21,865,750.00
Phase 3				
Public Roadway and Utilities	1,700	LF	\$400.00	\$680,000.00
				\$680,000.00

<i>Description</i>	<i>Quantity</i>	<i>Unit</i>	<i>Unit Price</i>	<i>Total</i>
Phase 4				
Expanded Soccer	1	LS	\$6,000,000.00	\$6,000,000.00
Futsal Fields	1	LS	\$250,000.00	\$250,000.00
Fieldhouse	1	LS	\$18,000,000.00	\$18,000,000.00
Fieldhouse Parking	11,500	SY	\$60.00	\$690,000.00
				\$24,940,000.00
Phase 5				
Community Center	1	LS	\$12,000,000.00	\$12,000,000.00
Outdoor Swimming Pool	1	LS	\$3,000,000.00	\$3,000,000.00
Natatorium	1	LS	\$14,000,000.00	\$14,000,000.00
Community Center Parking / Drive	14,000	SY	\$60.00	\$840,000.00
Community Center Utilities	1,000	LF	\$100.00	\$100,000.00
				\$29,840,000.00
Phase 6				
Public Roadway and Utilities	1,225	LF	\$400.00	\$490,000.00
Pedestrian Overpass	1	LS	\$4,000,000.00	\$4,000,000.00
Linear Water Park	1,800	LF	\$150.00	\$270,000.00
Public Roadway and Utilities	2,550	LF	\$400.00	\$1,020,000.00
Monument / Central Commons	1	LS	\$350,000.00	\$350,000.00
				\$6,130,000.00

<i>Description</i>	<i>Quantity</i>	<i>Unit</i>	<i>Unit Price</i>	<i>Total</i>
Phase 7				
Public Roadway and Utilities	1,000	LF	\$400.00	\$400,000.00
				\$400,000.00
Phase 8				
Site Entry / Drive	600	LF	\$400.00	\$240,000.00
Site Entry / Roundabout	1	LS	\$450,000.00	\$450,000.00
Public Roadway and Utilities	850	LF	\$400.00	\$340,000.00
Secondary Lake Expansion	77,000	CY	\$8.00	\$616,000.00
Water Features	1	LS	\$80,000.00	\$80,000.00
				\$1,726,000.00
Phase 9				
Site Entry / Drive	450	LF	\$400.00	\$180,000.00
Site Entry / Roundabout	1	LS	\$450,000.00	\$450,000.00
Public Roadway and Utilities	1,100	LF	\$400.00	\$440,000.00
Lake Boulevard	2,000	LF	\$300.00	\$600,000.00
				\$1,670,000.00
Phase 10				
Public Roadway and Utilities	400	LF	\$400.00	\$160,000.00
Amphitheater	1	LS	\$1,000,000.00	\$1,000,000.00
				\$1,160,000.00
GRAND TOTAL				\$95,391,750.00

Role of the Private Sector

The role of the private sector in the project area's eventual development is critical. The private sector must be invited into the development process and fully aware of the vision for the project area. The plan relies largely on the private sector to implement many of the land uses.

Therefore, the significant public investments that are planned for the project area must be widely advertised. Public infrastructure and projects can guide private investment. To this end, the City should develop communication inroads to the regional, and even national, development community and provide regular updates on planned, in-progress, and completed projects. Practically, the City should invite the development community to any related project meetings and advertise successes on the website.

Additionally, the City should identify potential development incentives to incentivize private development within the project area, such as tax-increment financing and tax abatement.

Closing

Implementation is arguably the most important step in the planning process, though it should not be a debilitating one. It is critical to take steps weekly to maintain and build momentum surrounding the plan. Without action, the plan will sit on the shelf. Therefore, it is vital to remain engaged with the stakeholders that guided the development of this plan. With continued engagement and frequent action, regardless of the size, the project area will become a bustling, recreational hub that Grand Island will be proud of.

Appendix A

Public Engagement Process and Findings

Prompted by the relocation of the Central Nebraska Veterans Home, the City of Grand Island, Nebraska has the opportunity to reimagine what the Central Nebraska Veterans Home and surrounding 640 acres may become in the future. As such, the land is now undergoing a master planning process, guided by input from project stakeholders, City staff, and residents of Grand Island.

This document details an integral part of the master planning process: the charrette.

Contents

Project Background	4	Existing Conditions Findings	8	Charrette Findings	14
Charrette Process	6	<i>Public Survey</i>		<i>Issue Identification and Priorities</i>	
Day One		<i>Preliminary Demographic and Economic Findings</i>		<i>Concept Exploration</i>	
Day Two		<i>Existing Site Conditions</i>		<i>Concept Narrowing</i>	
Day Three					



Project Background

In 1887, 640 acres, bounded by Highway 281/Airport Road to the north, Broadwell Avenue to the east, Capital Avenue to the south, and Webb Road to the west, were conveyed to the State of Nebraska in two parcels. Of the 640 acres, approximately 30 acres have been used to house veterans and their spouses over the past decades at what was originally known as the Nebraska Soldiers' and Sailors' Home. The rest of the land has historically been used for agricultural and recreational uses.

Today, agricultural and recreational uses still comprise the large majority of the acreage. Veterans' uses continue at what is referred to now as the Central Nebraska Veterans Home. This veterans' campus consists of multiple buildings, all which have housed veterans and provided support services. Other related uses occupy the southern half of the property, including the Veterans Cemetery on the southwest corner and the United Veterans Club and Veterans Park on the southeast corner of the site.

Given the age and condition of the current facilities, the Nebraska Department of Administrative Services and Department of Health and Human Services (operator of the Central Nebraska Veterans Home) found that the current Central Nebraska Veterans Home fails to meet current building standards, and that its design fundamentally conflicts with best practices listed in the Department of Veterans' Affairs' *Community Living Centers Design Guide* (June 2011). Therefore, the State determined that a new home should be built to meet the current Community Living Centers standards.

From there, the State appointed a selection committee to receive proposals from communities to locate the new home. Following proposal review, the committee recommended a new location in Kearney to the Governor. The Governor accepted the recommendation of the committee.

Following the design process, the State sought construction bids for the new home. The new Central Nebraska Veterans Home is scheduled to open in the fall of 2018. Once opened, all veterans currently residing in the Grand Island home will transition to the Kearney home.

Given the fact that (1) the State currently owns and operates the Central Nebraska Veterans Home and surrounding 640 acres and (2) the campus holds historical and sentimental value, specifically to those residing in Grand Island, the State and the City of Grand Island entered into an agreement. Upon completion of the new home, the State intends to convey the Grand Island real estate (including the Veterans Home Campus, Veterans Cemetery, and parking area leased to the United Veterans Club) and the agricultural and recreational lands currently leased to the City.

The conveyance will happen in two phases:

- **Phase 1** - Agricultural land, Eagle Scout Park, and Veterans Sport Complex
- **Phase 2** - Land and building currently holding the Central Nebraska Veterans Home and Veterans Cemetery

Given the size, importance, and current uses across all 640 acres, the City of Grand Island desires to develop a master plan for the revitalization and development of the former Central Nebraska Veterans Home land. **It is important to note that no changes will be proposed to the Veterans Cemetery and United Veterans Club properties.**

Additionally, two adjacent properties are included in the study: (1) the Stahla property, which is located directly north of Highway 281; and (2) Ashley Park. While major changes will not be proposed to either above mentioned property, the Stahla property may be used as off-site detention, a source of borrow material for construction, or as an extension of the City's hike/bike trail network. Ashley Park's recreational uses offer the potential to tie into the larger redevelopment of the project land.

To move the project forward, the City of Grand Island contracted with nationally-recognized multidisciplinary engineering firm, Olsson Associates, and its design studio, Ochsner Hare & Hare (planning team). The master plan will address the potential of the following uses:

- Continued use of the Central Nebraska Veterans Home property
- New residential and/or medical uses
- Use by other public agencies
- Redevelopment into new commercial, industrial, recreational, and/or residential uses
- Uses that commemorate or memorialize the service and/or history of State veterans (museum, interpretive center, active use of cemetery)
- No new suitable use



Charrette Process

Before a master plan's vision can be crafted, it is important to meet with stakeholders and members of the public to ensure that the preliminary planning recommendations and current understanding of the project area are in line with their knowledge and desires. As an integral step in the master planning process, a charrette was held by the planning team on July 26-28, 2017 at the City of Grand Island Utilities Department Building and Bosselman Conference Center.

A charrette advances the master planning process, narrowing in on preferred redevelopment concepts as determined by the stakeholders, City staff, and the public. Over this three-day period the planning team met multiple times with stakeholders, once with city staff and infrastructure partners, and once with the public to gather insight on their overall vision for the project area, programming preferences, and critical aspects to the master plan.

In preparation for the charrette, the planning team prepared site analysis maps, created a project website and public survey, gathered preliminary demographic and economic data, and visited the project area. This information provided the necessary context for the planning team to ask the right questions, in order to unveil the consensus-driven vision for

the project area. Between each session with the stakeholder groups, the public, and the City and infrastructure partners group, the planning team was able to digest, summarize, and alter the concepts according to feedback received. The schedule of events is detailed in the graphic on the following page.

With the history of the site in mind and public survey results analyzed, the planning team was able to engage the stakeholders, public, and the City and achieve the following goals:

- Clarify key issues and common concerns
- Identify positive site features
- Explore various master plan concepts and associated elements
- Narrow concepts to final concepts through prioritization exercises and consensus building

Day One

The charrette began with a presentation detailing the project background, public survey findings, preliminary demographic, economic, and market findings, the planning team's efforts to date, and an overview of the charrette. From there, the group completed a series of visioning exercises generally focused

on identifying the opportunities and constraints within the project area. For clarity's sake, the discussions were divided into the topics as follows:

- Land Use, Demographics, and Market
- Historic Character and Preservation
- Development and Redevelopment
- Aesthetics and Character
- Transportation and Infrastructure

The planning team split the stakeholders into five small groups and asked the groups to cycle through each station, answering specific questions related to each topic. Their responses were recorded on large post-it sheets for everyone to see. This way, each person could visibly see the thought process; this is a critical element of a charrette. Once the initial information was gathered, stakeholders completed a prioritization exercise with the use of dot stickers. Each stakeholder was provided with dot stickers, first, to place on the topic(s) they found most critical to the project area, and second, to place on the responses they agreed with most for each question.

What's the purpose of a charrette?

1 Assemble

Assemble key decision makers, such as City staff, elected officials, business owners, real estate developers, veterans, etc.

2 Collaborate

Collaborate with the decision makers in information sharing about the project area, iterative design concepts, and feedback and revisions.

3 Finetune

Finetune the master plan concept through strategic conversations with stakeholders, the public, and the City.

4 Create

Create a community-driven, realistic plan, grounded in market and economic reality.

Another way to assess a group’s opinion on a certain topic is through the use of word clouds. The stakeholders were asked to respond to two questions: (1) What are the top three site constraints to overcome? and (2) What are the top three site opportunities that should be maintained and/or enhanced? With the responses, the planning team generated two word clouds. Word clouds serve as a visualization tool; more prominence is given to repeated words. They are a useful communication and consensus-building tool as they identify similar threads of thought.

The City staff and infrastructure partners review session focused on the surrounding transportation network, site circulation, infrastructure needs within the site, and upcoming and applicable capital improvement projects.

Day Two

To begin day two, the planning team presented the findings from the previous day’s prioritization exercises. Stakeholders were asked to confirm the priorities. The primary activity scheduled for day two was initial concept development. The planning team had ample closed studio time to create master plan concepts.

After the morning closed studio session, stakeholders were asked to review all 24 concepts and provide feedback on what they liked and did not like. The planning team used the feedback to further refine the concepts during the afternoon’s closed design studio.

To finish the day, members of the community were invited to the Bosselman Conference Center. The open house was publicized on the City’s website, the project website, and in the Grand Island Independent. Approximately 110 community members attended the open house.

The open house was setup in a circular fashion, allowing attendees to start on one side of the room and work their way around the room, station to station. The stations were as follows:

- Project Overview
- Site Analysis Maps
- Survey Findings
- Questions by Topic
- Sketch Concepts Review

Each member of the public was greeted by a member of the planning team and asked to sign in and was given a direction sheet. As the event was informal, the planning team floated around the room to clarify information, answer questions, and gather additional input through written comments and one-on-one or group conversations. Several stakeholders and City officials were in attendance, as well, in order to help explain the stations and answer any questions.

Public feedback was plentiful. While topics of interest and conversation were mixed, the necessity of reserving land for veterans’ use was a sentiment shared by many attendees.

Day Three

The last day of the charrette began with a review of the public open house findings with the stakeholders. Given that information, stakeholders were given six dot stickers and asked to vote for their favorite concepts and provide additional comments.

During the closed studio session the planning team assessed the prioritized concepts and proceeded to create three large-scale final concepts that integrated the preferred features from each concept.

The final session of the charrette provided time for the stakeholders to review each of the three final concepts and provide final comments and direction.

Schedule of Events

Day One - Wednesday, July 26

- | | |
|----------|--|
| 9 - 11 | Kick Off Session, Programming, Visioning
<i>(Stakeholders)</i> |
| 1 - 5 | Open Design Studio - Brainstorming, Comment Review, Existing Analysis <i>(Earlier participants are free to come and go and discuss other ideas.)</i> |
| 2 - 3:30 | City Staff and Infrastructure Partners Review
<i>(Invited Session)</i> |
| 5 - 6 | Review the Day – Non-Structured Open Session
<i>(Stakeholders)</i> |

Day Two - Thursday, July 27

- | | |
|----------|--|
| 8 - 9 | Programming, Prioritization, Site Analysis Review
<i>(Stakeholders)</i> |
| 9 - 12 | Design Studio - Concept Development <i>(Closed)</i> |
| 12 - 1 | Initial Concept Review <i>(Stakeholders)</i> |
| 2 - 5 | Design Studio - Concept Development <i>(Closed)</i> |
| 5 - 7:30 | Public Open House |

Day Three - Friday, July 28

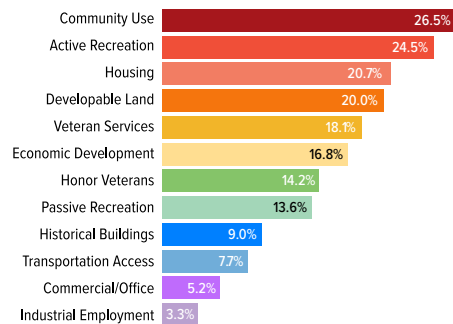
- | | |
|----------|--|
| 8 - 9 | Concept Narrowing <i>(Stakeholders)</i> |
| 9 - 12 | Design Studio - Final Concept Development
<i>(Closed)</i> |
| 1 - 4 | Design Studio - Final Concept Development
<i>(Closed)</i> |
| 3:30 - 5 | Final Concept Review <i>(Stakeholders)</i> |

Existing Conditions Findings

Public Survey

In order to provide context for the stakeholders and public, the planning team created a survey that asked participants about the issues and opportunities and their values for the project area, to be completed by July 23. The survey was open for approximately one month. Respondents could take the survey on the project website or pick up paper copies at the library, Olsson Associates' office, and City Hall. The survey was advertised in the Grand Island Independent, on the project website, and on the City's website. The response rate was high. In total, 184 surveys were completed. Of the 184, 164 were completed online and 20 paper surveys were returned. The following text and graphics illustrate the survey findings:

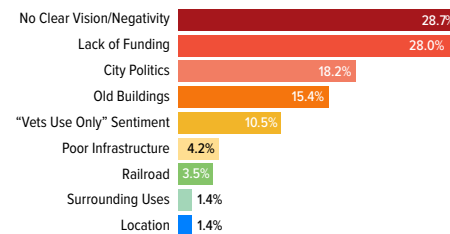
1 What is the greatest OPPORTUNITY to capitalize on?



Summary of Findings

- To survey respondents, the greatest opportunity on the project site is to make a space useable and enjoyed by the entire community.
- Following closely behind, increased and enhanced active recreation opportunities are preferred.
- Increased (affordable) housing options for veterans and Grand Island residents alike were the third most noted opportunity.
- While noted, increased industrial space and associated employment opportunities were mentioned infrequently.

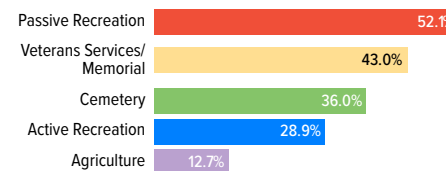
2 What is the biggest CONSTRAINT to overcome?



Summary of Findings

- The lack of a clear and unified vision for the project area, as well as the negativity surrounding the relocation of the Veteran's Home, is the largest constraint on the project.
- Following closely behind, a lack of funding was noted as a constraint to overcome.
- It is important to note that perceived City politics and distrust of elected officials is a project constraint; 18.2% of the responses received mentioned City politics.
- In general, the surrounding uses and location of the site are suitable.

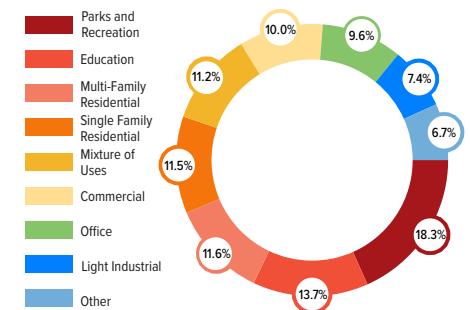
3 What current land uses should be preserved?



Summary of Findings

- The current passive recreation opportunities, including the lake, green space, etc., are the most valuable to survey respondents.
- Following closely behind, the current veteran services offered and veteran memorials should be preserved, according to survey respondents.
- While agriculture was noted as an important land use to preserve in 12.7% of the responses, it was mentioned infrequently.

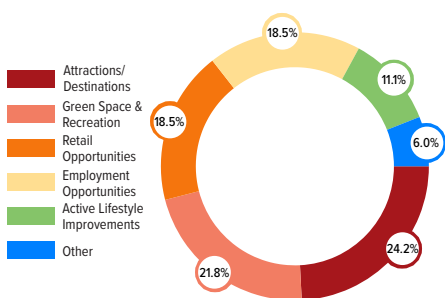
4 What future land uses do you envision?



Summary of Findings

- Parks and recreation is the most envisioned land use within the project area.
- Following parks and recreation, education (either high school or college-level) is a highly preferred land use.
- Light industrial is the least preferred land use.
- "Other" responses primarily include the following:
 - Agriculture
 - Technology
 - Veteran only housing and services

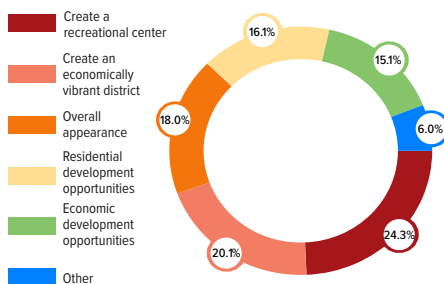
5 Rank the following quality of life improvements.



Summary of Findings

- Survey respondents most want more attractions and destinations within the project area; community gathering areas are desired.
- Similar to other findings, survey respondents hope for more green space and recreational opportunities.
- “Other” responses primarily include the following:
 - Formal education opportunities
 - Veteran only housing and services development
 - Affordable housing options

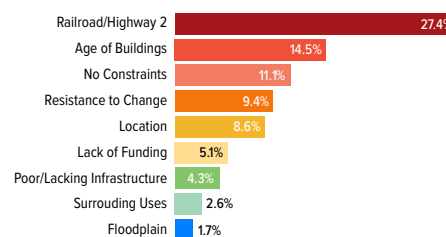
6 Keeping an eye toward the future, rank the following project goals.



Summary of Findings

- Survey respondents prioritized the creation of a recreational center within Grand Island, following closely by the creation of a economically vibrant district within the City.
- Pure economic development is the least important project goal to survey respondents.
- “Other” responses primarily include the following:
 - Increase educational opportunities
 - Increase veteran services and memorials
 - Install clean technologies

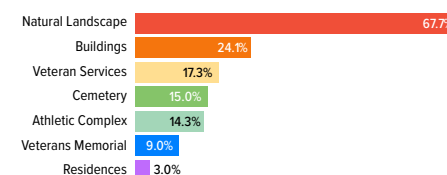
7 WEAKNESSES: What constrains development?



Summary of Findings

- The largest development constraint is railroad / Highway 2 that divides the project area.
- While some of the buildings may be reused and renovated, the overall age of the buildings presents high costs.
- It should be noted that 11.1% of the responses to this question stated that the site is ready for development and that no constraints are present.

8 STRENGTHS: Which area features should be maintained or enhanced?



Summary of Findings

- The natural landscape and associated features (green space, lake, etc.) is the most important project area feature to maintain and enhance, by far.
- Survey respondents find value in the existing buildings; opportunities for reuse/renovation will likely be supported by survey respondents.
- In general, the existing residences within the project area are not critical to maintain and enhance, though their future should be discussed.

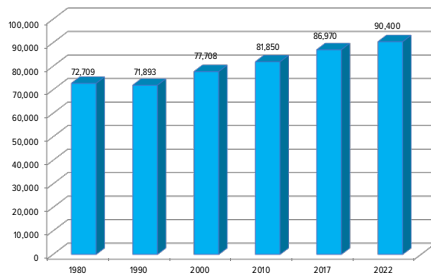
Preliminary Demographic and Economic Findings

A preliminary analysis of Grand Island's demographic and economic trends was conducted prior to the charrette to provide further context to stakeholders during visioning and design discussions. This way, a common starting point was provided for developing policy recommendations. The following demographic and economic overview is a summary of a more detailed market analysis that will be conducted and integrated into the final plan. At this stage, the following sections assess current trends and market implications.

This preliminary analysis documents trends at the City and metropolitan statistical area level to form a better understanding of Grand Island's competitive position within the market. The data for this preliminary analysis was gathered from a variety of sources, including the U.S. Census Bureau, Esri Business Analyst, the City of Grand Island, and the U.S. Bureau of Labor Statistics. The following text and graphics illustrate the preliminary demographic and economic findings:

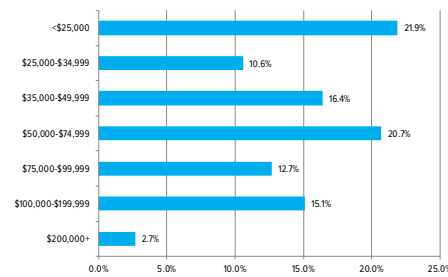
Metropolitan Statistical Area (Hall, Hamilton, Howard, and Merrick Counties)

MSA Population Growth Trends



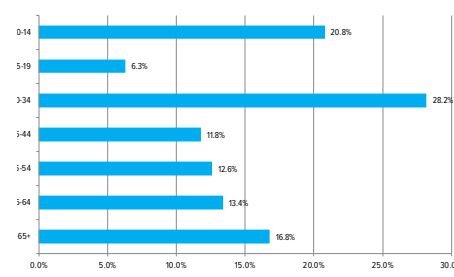
- From 1990 to 2017 the MSA population increased by nearly 21%, adding over 15,000 new residents.
- Over the next five years the MSA population is forecast to increase by 3.9% to 90,400 residents.

MSA Households by Income



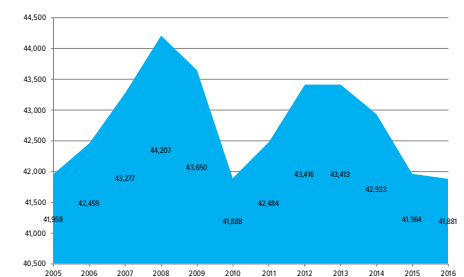
- The average household income for the Grand Island MSA of \$66,245 compares favorably to \$52,680 for Nebraska and \$55,775 for the United States.
- High-income households with incomes of \$100,000 or more account for 15.8% of all households and represent potential demand for luxury housing and retail goods and services.
- Households with incomes of less than \$25,000 account for 21.9% of all households, suggesting a need for affordable housing.

MSA Population by Age



- The average age of the Grand Island MSA population is 38.8 years.
- The large adolescent population generates demand for groceries, clothing, sports apparel, and electronics.
- The large Millennial population provides demand for rental housing, clothing, electronics, entertainment, and eating and drinking establishments.
- Adults ages 35 to 54 years are in their peak spending years particularly for housing, home furnishings, home improvements, clothing, and entertainment.
- The baby boomer market provides opportunities for home downsizing, restaurants, entertainment, and travel.
- The large 65+ population creates a need for affordable senior housing and healthcare.

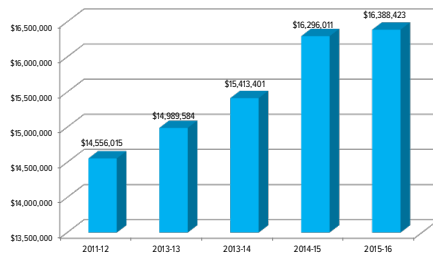
MSA Employment Growth



- After peaking in 2008, total employment in the Grand Island MSA declined during 2009 and 2010 in response to the national recession.
- Job growth rebounded from 2011 to 2013 but failed to match the pre-recession levels.
- Job loss resumed in 2014 and by 2016 total employment was at its lowest level since 2005.
- Stagnant employment levels adversely impacts commercial and industrial space absorption.

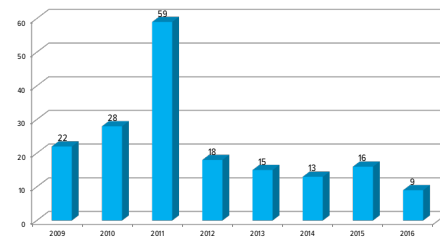
Grand Island, Nebraska

Grand Island FY Sales Tax Receipts



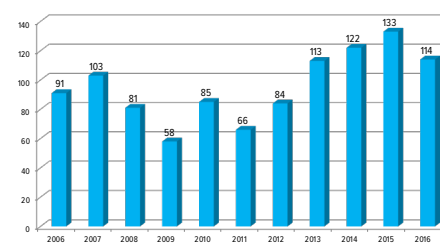
- From FY 2011-12 through FY 2015-16 sales tax receipts for the City of Grand Island increased by 12.6%.
- Through the first eight months of FY 2016-17 sales tax receipts were up just 0.49% over the same 8-month timeframe during the prior fiscal year.

Grand Island New Commercial Construction Permit Volumes; 2009 - 2016



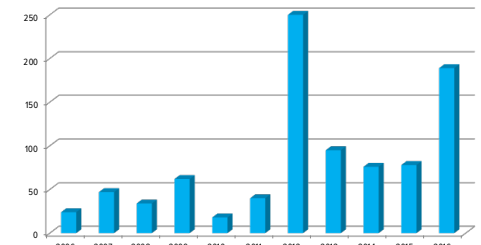
- From 2009 through 2016 new commercial construction peaked in 2011 when 59 permits were issued.
- Since 2011 new commercial construction volumes have declined steadily reaching a low of just nine permits issued in 2016.

Grand Island Single Family Home Construction Permits Issued; 2006 - 2016



- From 2012 through 2015 the City of Grand Island new housing market was on the rebound peaking in 2015 when 133 homes were permitted for construction.
- During 2016 new single family home construction declined 14.3 percent to a total of 114 dwelling units permitted.
- During the first half of 2017 a total of 45 single family homes were permitted for construction, down 23.7 percent from the first half of 2016.

Grand Island Multi-Family Residential Units Permitted for Construction; 2006 - 2016



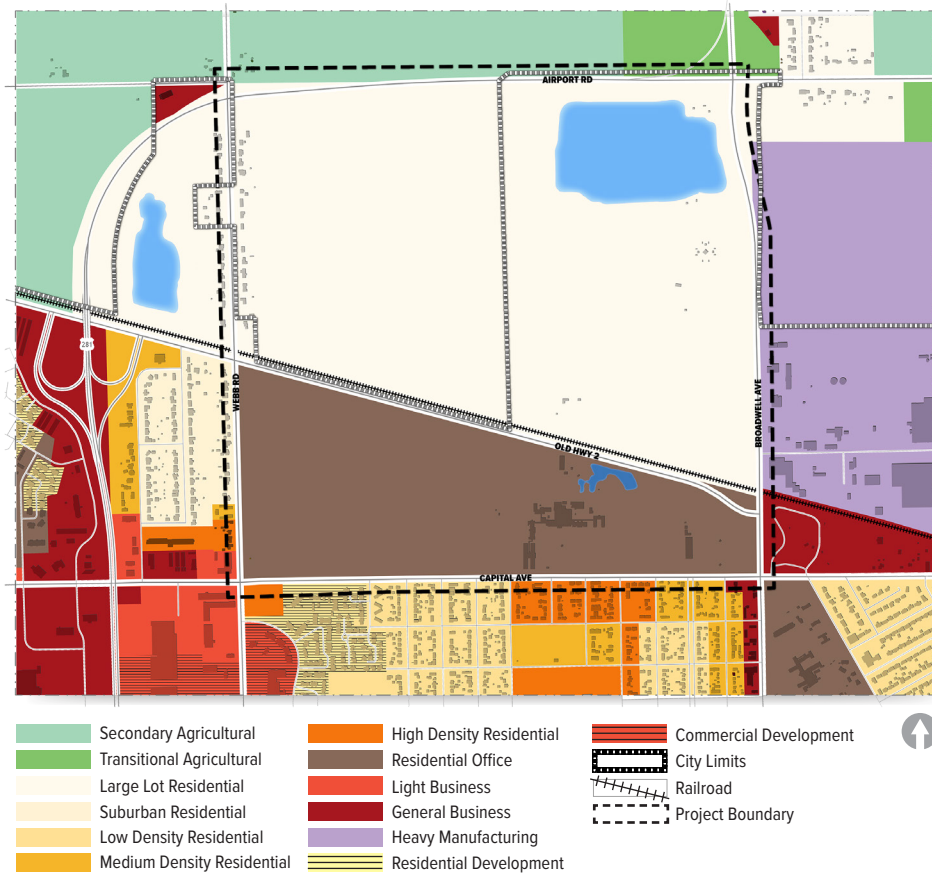
- From 2012 through 2016 the City of Grand Island experienced a boom in the construction of multi-family housing with a total of 688 dwelling units permitted for construction.
- Through the first half of 2017 new construction activity remained strong with 74 multi-family units being issued building permits.

Existing Site Conditions

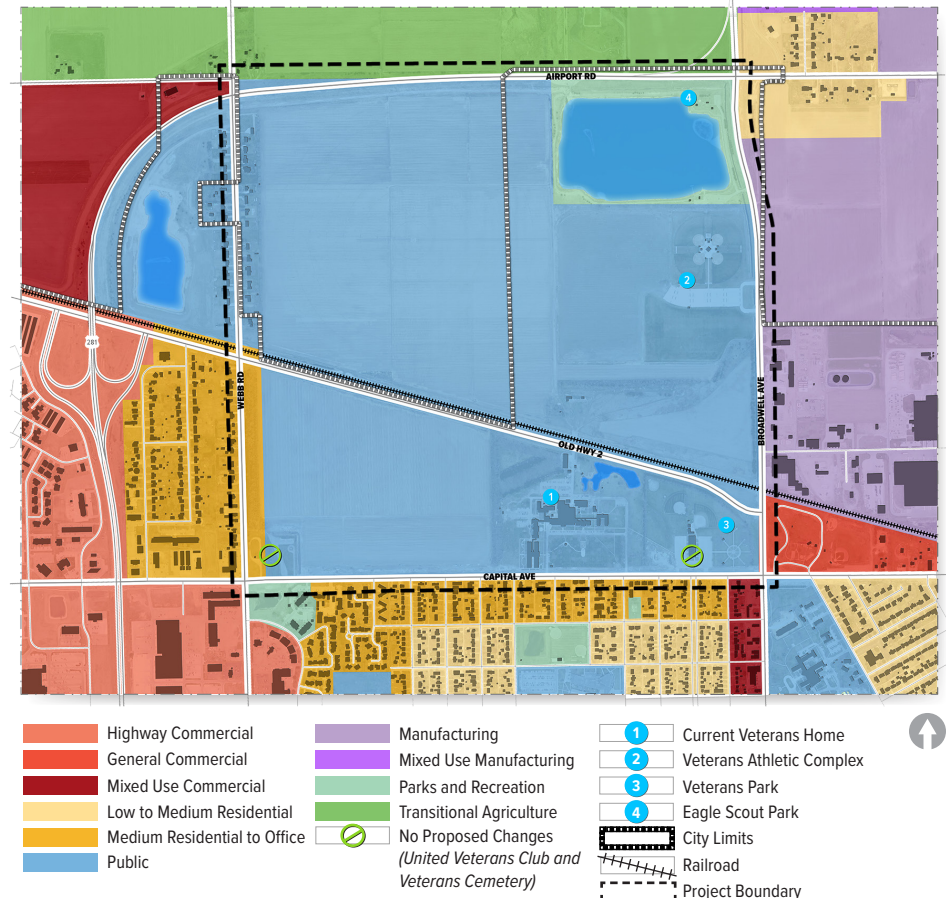
A preliminary analysis of the project area's existing conditions, including existing zoning, future land use (based on the City's future plan use plan), floodplain, topography, parcels, and soil data, was conducted prior to the charrette to provide further context to the planning team and stakeholders. The full series of existing conditions maps and associated analysis will be included in the final plan. The maps below provide an abbreviated summary of the data to be provided in the full Existing Conditions chapter of the master plan. Key items of note include:

- **Existing Zoning Districts** The project area is currently zoned for Large Lot Residential and Residential Office; the site is surrounded by a mixture of business, residential, recreational, agricultural, and manufacturing uses.
- **Future Land Use and Places of Interest** The project area is currently envisioned completely as a public use.
- **Floodplain** Almost the entire project area falls within the Special Flood Hazard Area, which is a major development restriction.

Existing Zoning Districts



Future Land Use (Based on City's Future Land Use Plan) and Places of Interest



Floodplain



- Special Flood Hazard Area (Zone A or AE)
- City Limits
- Railroad
- Project Boundary



Veterans Cemetery Master Plan



A Veterans Cemetery Master Plan (VCMP) was completed in 2016 to address the nearing capacity of the Grand Island Public Cemetery. This plan does not propose any changes to the Veterans Cemetery, but largely will integrate the VCMP. As part of the VCMP, the City agreed to maintain existing the Veterans Cemetery and provide a buffer from surrounding land uses.

Veterans Sport Complex Master Plan



A Veterans Sports Complex Master Plan (VSCMP) was recently completed. The first phase was approved by the City in April 2017. The VSCMP proposes six softball fields, concessions and restrooms, and a splash pad. This plan will largely integrate the VSCMP.

Charrette Findings

Issue Identification and Priorities

As previously mentioned, the first exercise on day one of the charrette was focused on visioning and the identification of issues and opportunities within the project area. The planning team asked stakeholders to break out into five groups and move station to station to respond to various topical questions. Later in the day, the stakeholders were instructed to first prioritize the topics of discussion and then their responses to each question. The following tables detail the findings, and the results of the prioritization exercises following the initial exercise.

Topics by Priority

- 1** Land Use, Demographics, and Market
- 2** Development and Redevelopment
- 3** Transportation and Infrastructure
- 3** Historic Character and Preservation
- 4** Aesthetics and Character

Tie {

1 Land Use, Demographics, and Market

What uses are appropriate?

1 Secondary educational campus (school of math, science, and IT)	19	2 Cemetery expansion	10
1 Job creation (replacement of Veterans Home jobs with other higher paying jobs)	19	3 Residential - "new urbanism" style, mixed use, walkable	6
2 Use farm ground west of fields to increase tax base	10	Hospitality accommodations 1 (hotel for tournament / restaurants)	1
2 Recreation	10	Revenue generation	0

What uses are needed in Grand Island that could be accommodated on the site?

1 Housing	4	Higher paying jobs	1
2 Hotel / convention center (southeast corner near sports complex)	3	Specialty university	0
3 Quality of life	2	Research and development	0
3 Agriculture research	2	IT	0
Recreational opportunities (lazy river for kayaking, link to Eagle Scout Park)	1		

What market opportunities exist that the site could capitalize on?

1 Educational (tie in with nearby schools)	5	Recreation can create tax base through tourism	1
2 Need to have tax base created here	4	High end dining	0
3 Cyber security	2	Residential	0

2 Development and Redevelopment

What are the key redevelopment and development opportunities?

1 Higher education	19	Proximity (schools, residential, etc.)	2
2 Fieldhouse / aquatic center	14	Job creation (replacement of lost Veterans home jobs)	1
3 IT School (such as NE School of Science and Mathematics and Technology)	12	Accessibility (to the south)	0
3 Housing	12	State funds set aside for demolition	0
Schools / education	8	Industrial development northwest to Eagle Scout Lake	0
Commercial development consistent with area and needs	5	Western Nebraska Agriculture Campus	0
History of being a Veterans Home	3		

What are the key hurdles to development and redevelopment?

1 Community in fighting, getting to consensus, breaking grudges	5	History of being a Veterans Home	0
2 Groundwater / floodplain	3	RDX plume	0
2 Timing	3	Infrastructure	0
3 Railroad / Highway 2	1	Current projects (patchwork)	0
3 Broadwell expansion (4 lanes?)	1	Limited to Veterans' uses, theme, and legacy	0

3 Transportation and Infrastructure

What transportation and infrastructure needs or insufficiencies exist (to or on the site)?

1 Pedestrian bridge to ball fields, etc.	11	Webb Rd. / Highway 2 intersection (lack of stacking before railroad tracks)	1
2 Custer Ave. overpass with pedestrian	7	North / south roads (in area and surrounding)	0
3 Railroad impact mitigation (elevated? sound barriers?)	2	Expansion of infrastructure utilities north of railroad	0
3 Funding	2	Broadwell Ave. improvement north of railroad	0
Highway 2 impact mitigation	1		

What existing transportation and infrastructure capacities can be capitalized on?

1 Custer Ave. overpass with pedestrian	9	3 Capital Ave. and Broadwell Ave. improvements	1
2 Surrounding utility infrastructure	2	Expansion of hike/bike trail	0

3 Historic Character and Preservation

What should be preserved or protected and enhanced?

1 Cemetery	9	Veterans Park	1
2 Veterans Home / tribute / character	5	Recreation areas (Eagle Scout Park and ballfield complex)	1
3 VFW / United Veterans Club	4	Memorial spaces (wall, etc.)	1
3 Pond / landscaping	4	Military monuments / equipment	0
Existing buildings (opportunities available for funding, such as Historic Tax Credits 40%)	3	Development prioritized by existing infrastructure (sewer, water, streets)	0

What areas can be modified or altered?

1 Northern extension of hike/ bike trails	7	Overpass to north area / Eagle Scout ballfields	0
2 Existing building reuse	2	Railroad	0
3 Drainageways	1	Adjacent areas	0
Corn fields	0	Recreational areas (lakes, sport fields)	0
Highway 2 (relocate)	0		

4 Aesthetics and Character

What are the key opportunities for enhancing overall aesthetics and creating and capitalizing on existing character?

1 Amphitheater	11	United Veterans Club	0
2 Hike/bike trails	8	Recreational opportunities	0
3 Green space	7	Flags	0
Additional activities for lake	3	Northern area of site	0
Park at Eagle Scout Park	2	Redevelopment south of Capital Ave.	0
GIVH grounds	2	Webb Rd.	0
Tribute wall	2	West of lake area	0
Cemetery	0		

What are negative or objectionable aesthetics and character issues that should be mitigated?

1 Highway 2 / Railroad	8	Clean up farm areas	0
2 Moore's Creek enhancements	2	Commercial to south and east	0
Agriculture close to enhanced area	0	Boring concrete slabs in prominent areas	0

Word Clouds

The final exercise on day one was the creation of word clouds. Words clouds were created for both of the following questions. They largely served as a summary of the day's discussions.

What are the top 3 site constraints to overcome?



What are the top 3 site opportunities that should be maintained and/or enhanced?



Concept Exploration

Day two focused on initial concept development and the public open house. During the morning closed studio time, the planning team developed 24 initial master plan sketches. Stakeholders provided feedback on the initial sketches over lunch, allowing the planning team to further refine them before the public open house. The public was asked to review each of the 24 concepts, and respond to the the same issue identification and priority questions that the stakeholders were asked during day one. The public's responses to those questions are detailed on pages 21-22.

Sketch Concepts Stakeholder and Public Findings

To record day two, each sketch concept is shown with the stakeholders' and the public's comments as follows. A summarized list of stakeholder preferences is provided after.

1

Stakeholder Comments

- Nice water features
- Development ground
- Nice blend of uses
- Worth trying to close Webb RR crossing (I like the diverted road)
- Good traffic movements
- Business near Veterans Cemetery
- Mitigate reliance on Custer St. = more traffic by senior high to south
- Not enough land for cemetery
- City cemetery north of Veterans seems like it would increase maintenance costs

Public Sentiment

- Veterans Cemetery should be for veterans only; no City cemetery on this site
- No commercial or office
- No more ball parks or fields
- It makes sense to add a City cemetery space while keeping a separate area for veterans

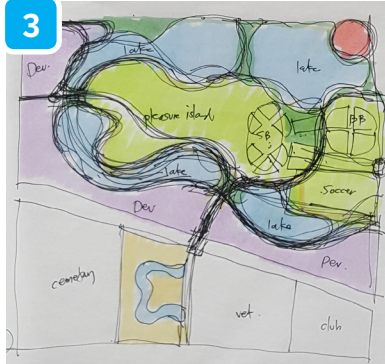
2

Stakeholder Comments

- Recreational facilities fit together
- Agriculture - possible development
- Adaptive reuse possibilities
- Agriculture use is use of potential
- Is RV park economically viable?
- Already have manufacturing parks
- Custer Ave. cut through traffic

Public Sentiment

- Farm the land
- No manufacturing
- No bigger lake or fields
- Like the parks
- Football stadium
- Sell the land and build hospice care center for veterans
- Define support commercial

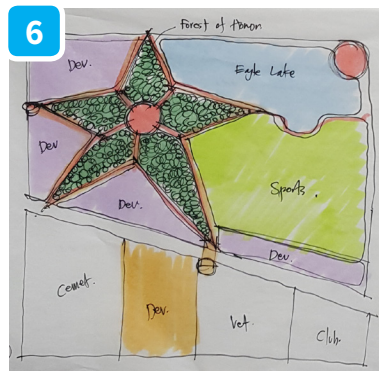


Stakeholder Comments

- Like lakefront development
- Financially supports green space maintenance
- Connected waterways
- Water around business development
- South water feature is maintenance issue

Public Sentiment

- Great idea, like the water
- Expand cemetery, no more parks
- No City cemetery (x4)
- Like it - "Pleasure Island" and more development
- Land belongs to the veterans; let them decide



Stakeholder Comments

- Like the star idea (though maybe not so large)
- Seems maintenance expensive
- Star idea is too big
- Decades before trees grow

Public Sentiment

- Memorial park
- No expanding sports fields
- Expand sports fields
- Wrong - what is develop?
- No City cemetery
- How about tiny homes for veterans and assisted living?
- Put ball field east of the fairgrounds, at the parking lot; leave the Vets ground

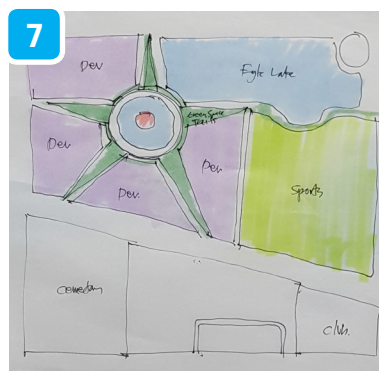


Stakeholder Comments

- Like water features
- RV Park
- Education campus on south side of Hwy. 2
- Not reliant on Custer overpass
- Education campus
- Little corporate/business land for revenue enhancement

Public Sentiment

- Love the lake expansion and green space (x2)
- Not enough development
- No shopping or strip malls
- No City cemetery; define development (x3)
- Like educational space (x2)
- Expand sports complex; No RV

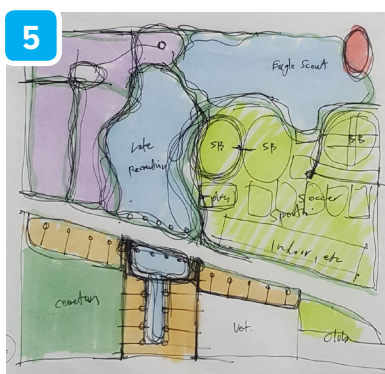


Stakeholder Comments

- Less traffic
- Maintains theme to honor vets
- Unified space for expanded existing campus
- No vehicular routes between star prongs
- Too much space devoted to star
- Park space is sports only - no passive

Public Sentiment

- Like the star
- This land belongs to the veterans, let them decide
- No City cemetery
- This is wrong



Stakeholder Comments

- Nice sports areas
- No education space
- Little passive recreation
- Lake is surrounded by roads

Public Sentiment

- No more sports fields (x6)
- Big lake yes! (x2)
- No City cemetery (x2)
- No mini malls



Stakeholder Comments

- Like revenue/develop opportunities
- Nice water space
- Reliant on outer thoroughfares
- Water amenity for many uses at once
- No access from south to corporate park from Hwy. 2
- Lose rec space
- Don't like south residential near cemetery
- Think business use need to go north of Hwy. 2 to preserve home property and surrounding area
- Loss of park/rec space

Public Sentiment

- Good mix uses, good vision
- No (x13)
- Great possibilities
- I don't like this expect for Veterans Cemetery expansion
- No residential or commercial
- Best design for entire community
- Too much residential
- Keep the agriculture land in production
- I like the variety of uses, just think original buildings should be kept as much as possible



Stakeholder Comments

- + Not dependant on overpass (Custer over Hwy. 2)
- + Like the Broadwell-Webb connection and Custer connection to Hwy. 2
- Agriculture use is use of potential
- Is RV park economically viable?
- Good water features
- Nice use of space and extension to the west
- Already have manufacturing parks
- Custer Ave. cut through traffic

Public Sentiment

- No / don't like this (x2)
- Interesting concept with south developed for veterans and north for long term community benefit
- Has potential
- Yes, love it!
- How does this honor vets? (x3)
- Like the connection of Webb and Broadwell, and Capital and Old Hwy. 2



Stakeholder Comments

- + RV park!
- + Like lake expansion to the west
- Bigger this lake the better!
- Need more development space
- High maintenance costs
- Balance water (borrow) with fill sites

Public Sentiment

- No way!
- Housing for vets
- Too much park / not enough development
- No City cemetery (x2)
- Like this one!
- We don't need another campus, we need something fun for vets no matter what their age
- Love the water and green space!
- Good mixed use concept; use excavated material to buffer rail line
- Lake big enough



Stakeholder Comments

- + Nice balance of development and sports
- + Inviting commercial development
- Nice layout, especially recreation
- Dependent on Custer overpass
- Too much water

Public Sentiment

- Housing for vets (x9)
- Vet's club; vet's home reuse
- Like expanded water and connection to Webb
- No City cemetery



Stakeholder Comments

- + Shape of lake
- Grand Island
- Pigeon holes education area no room to grow
- Too much water
- No business/commercial area

Public Sentiment

- The only thing for the veterans is the club and cemetery
- A museum honoring all veterans (Civil War to present)
- Do not expand ball fields; expand Veterans cemetery
- How does an RV park enhance these grounds?
- Needs more business/commercial development
- No City cemetery
- None of these are for vets!

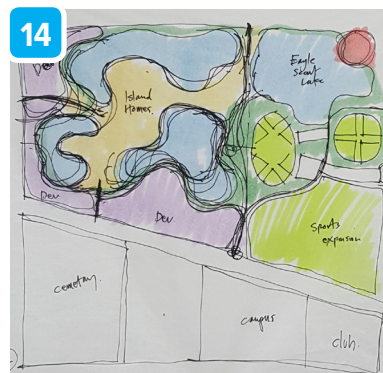


Stakeholder Comments

- + Like the development areas accessible to the highway
- Hancock St. is not a thoroughfare

Public Sentiment

- None of the above
- Use the original buildings for vets
- Too many sports complexes
- Big sports complex
- No City cemetery
- Too many recreational sketches



Stakeholder Comments

- + Island water
- + Not reliant upon Custer expansion
- Too much water
- Not enough taxable development
- Don't like island homes

Public Sentiment

- Remember the vets who fought for us (x2)
- Vets only (x4)
- Do the right thing for the vets and the right revenue
- None of this (x2)
- No more development



15

Stakeholder Comments

- Star (maybe not in that location)
 - Not reliant on Custer expansion
 - Community center - fieldhouse campus (includes library)
-
- Large amount of recreation and water = less direct revenue producing opportunities
 - Too much water
 - Segregation of water

Public Sentiment

- Too many ponds (x2)
- Farm ground for income for vets land (x2)
- No (x2)
- Vets only (x3)
- None of these sketches pertain to veterans!
- Star = Vets memorial park
- Like the idea of expanding the Vet's memorial throughout entire development
- Love the ponds and green space; not sure about the development



16

Stakeholder Comments

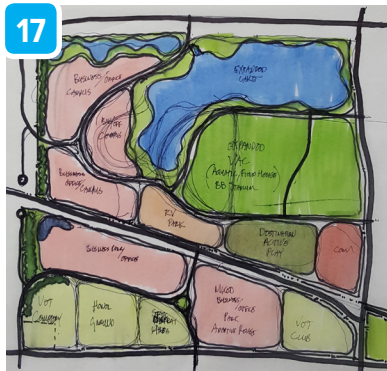
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graph LR
 Pros[+] --- P1[Pool aquatics]
 Pros --- P2[Not reliant on Custer expansion]
 Pros --- P3[Community center]
 Cons[-] --- C1[Want water connected]
 Cons --- C2[Too much water]
 Cons --- C3[Cannot do that many pits]
 Cons --- C4[281 frontage mostly lakes]
 Cons --- C5[Segregation of water]

```
- Pros**
- Pool aquatics
  - Not reliant on Custer expansion
  - Community center
- Cons**
- Want water connected
  - Too much water
  - Cannot do that many pits
  - 281 frontage mostly lakes
  - Segregation of water

## Public Sentiment

- Vets only (x2)
- Too many isolated bodies of water (x3)
- Give the property to the vets
- Keep the fields in production
- Too much recreation
- No way (x3)
- I like the recreation for residents and visitors



## 17

## Stakeholder Comments

- Appropriate water feature
  - Opportunity to develop tracts as need arises
  - Good connectivity
  - Expand lakes

---

  - No Grand Island cemetery expansion
  - RV park
  - RV park next to business/commercial space
  - No residential

## Public Sentiment

- No (x7)
- Yes!
- Like the connectivity and mixed uses
- Good use for the community
- Vets need housing and job skills
- This looks like a recreation park - for vets?
- A lot of possibilities
- Expand vets cemetery for all veterans. Do not put offices or businesses on this land.
- No more parks
- Good expanded lake
- Have a veterans education so they can use and learn a trait



## 18

## Stakeholder Comments

- Expands existing campus for education
  - Not reliant on Custer expansion
  - Good water recreation
  - Corporate/bus. development
  - Like frontage roads
  - Like park extension into lakes
  - True mixed uses
  - Distinction between N/S areas
  - South lake good fit for fill for fields
  - All development has water view  
  - Would like to see Custer go to Hwy. 2
  - Too much water
  - Do not like Custer access - High School, Central Catholic, and Walnut (too much traffic load)

## Public Sentiment

- Nothing for the vets (x5)
- Vets only
- Love it!
- Good access and rec areas
- No City cemetery for this site; use site for all ages of vets
- All parks! No parks!
- Increase cemetery for vets, also housing; forget development and water lakes



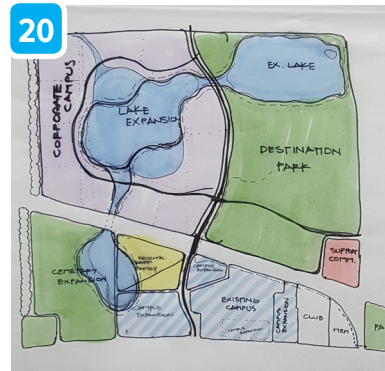
## 19

### Stakeholder Comments

- |   |                                                                                                                     |                                                                                               |
|---|---------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| + | <ul style="list-style-type: none"> <li>• Good water recreation</li> <li>• Corporate business development</li> </ul> | <ul style="list-style-type: none"> <li>• Expanded, uninterrupted campus</li> </ul>            |
| - | <ul style="list-style-type: none"> <li>• Parks are restricted</li> <li>• Overpass could create</li> </ul>           | <ul style="list-style-type: none"> <li>• Boxy</li> <li>• Above grade rail crossing</li> </ul> |

## Public Sentiment

- No (x2)
- No more sports (x2)
- Vets only
- Make vets cemetery bigger
- If this is for high dollar housing that is not needed; maybe duplexes for veterans with a rec center for vets
- Looks functional and viable
- Great concept
- Campus for vets
- Rec park out



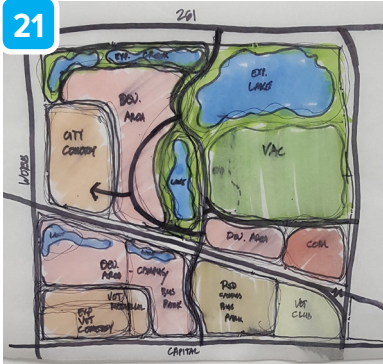
## 20

### Stakeholder Comments

- Nice mix of uses
  - Lake access off 281 is good
  - Lake expansion to the west as a big body of water
  - Good north/south flow
  - Good west/east use
  - Thru north/south traffic could create undesired thru traffic
  - West lake water versus development frontage

## Public Sentiment

- Cemetery for vets only
- Vets only
- No parks
- Perfect!
- It would seem like this is way too much of an area for a lake
- No way!
- I like it too!
- No lake expansion or destination park



### Stakeholder Comments

- + None listed
- Don't care for broken up water space (not good for water recreation)
- State just built new veterans cemetery (no need!)
- Split cemeteries and water = higher maintenance costs

### Public Sentiment

- No!
- No City cemetery (x2)
- Vets only (x2)
- Good use of expanded ponds and connections
- Keep things for vets south of highway
- This land belongs to the vets

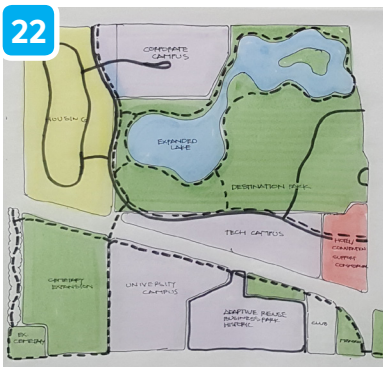


### Stakeholder Comments

- + None listed
- Want more water than this
- Development needs a better view than sports fields
- Segregated development concepts (vets south, everything else north)

### Public Sentiment

- Too many sports fields (x4)
- No City cemetery (x2)
- No (x2)
- No development
- No more parks please
- Like the memorial
- Let's build a technology park. Work with UNL on Business Development park.



### Stakeholder Comments

- + Like the expanded water
- + Good trail connection (could be fitness trail with veterans memorial)
- + Good mixed use
- + Grand campus
- Not reliant on Custer
- Event space support (hospitality)
- Like the pedestrian connection over railroad
- Need market study to see if hotel/convention center is viable venture
- Limited corporate/business for economic impact
- Too much housing
- Tech campus and university campus split... why?

### Public Sentiment

- This is terrific
- No City cemetery (x5)
- Vets only
- Perfect!
- Good trail system; utilize trails to expand vets memorial
- Good use of Hwy. 281 as entrance to community



### Stakeholder Comments

- + Campground a good idea with pedestrian bridge
- Need to connect
- RV? campground
- Does a campground pay for itself? Economically viable?

### Public Sentiment

- No campground (x2)
- No; vets only (x5)
- A campground might be good if needed. We do have a Hall County park for camping.

## Summarized Stakeholder Findings

To end the last stakeholder meeting of day two, the planning team led a discussion about the stakeholders' preferred features to be included in the final master plan concept. The following list and the public feedback provided the necessary direction for the planning team to narrow the master plan concepts.

- **Interconnected water spaces** that are not choppy and that are attractive for business development and active recreation
- **Waterway views** that are shared by all users (land development parcels, roadways, and park development)
- **Separation of parks from education**; keep each in their own respective area (north and south)
- **Easy site access north of Highway 2** and its borrowed open space views
- **Non-residential development** that is incorporated with water
- **Development with maintenance requirements and development costs in mind**
- **Individual tract development** that avoids choppy development styles
- **Fieldhouse development** within the athletic field complex
- **Keeping Custer Avenue out of parcel north of Highway 2** to maintain southern half of property's continuity
- **Pedestrian bridge** to tie the north and south property together
- **Linked trail systems with homage to veterans** through the use of stations
- **Open northern half of property** for development

## Additional Public Response

The public was asked to respond to the same topical questions that the stakeholders were asked during day one's exercises. The complete record of their responses is provided as follows.

### What uses are appropriate on site (all 640 acres)?

- A memorial park
- Community for veterans; dance hall; vote open to the public; pay reasonable price
- It doesn't belong to anyone but the veterans!
- Vet's housing, job retraining and resource center, vet's services, employment for vets
- I feel that since we are talking 640 acres of sacred grounds it should be kept as an assisted living facility
- Aquatic park; high school for math/science and technology
- Housing for low income veterans; \$600.00 per month is too high
- Use for educational for veterans; increase cemetery
- Leave the farm ground alone (it's income); a fishing pond for vets and family; large pond for fishing
- All but manufacturing
- Let's let vets have 2 acres to build on homes
- It should be used to benefit the veterans!!!
- Grand Island Military Academy, mostly rich brat kids who need discipline, show respect, a high academics, grooming, and house keeping, parents visit, spend money, tell friends, brochures about Grand Island, Nebraska; kids get good resume; reputation spreads around world
- With housing need to see rehab center for returning and current veterans.
- A memorial park is the only appropriate use
- Since it is set in concrete anyway, build residential sites - stop expanding to the west; we vets were screwed by Governor Heineman
- Education to include veterans. Veterans housing and veterans services.
- Maybe some could be used for low income vets or homeless vets
- Enlarge sports complex; museum for vets; enlarge cemetery
- Use buildings for vet housing, tech training; farm the agriculture land; use the profits to keep funding the projects
- Annex of City cemetery
- For veteran use only!!
- Only veteran uses. Farm the existing acres. Use the cemetery for vets. Maintain Park and Club ground.
- Low cost housing for veterans
- This land belongs to the Veterans only; let them decide not City
- RV park with lake for pull-in and reserved area for veterans
- Higher education with other mixed uses; great opportunity for a gateway project.
- Farm income can support the veterans ongoing
- Keep farm ground in production; most vets do not play soccer or baseball; use for home development
- Housing for vets, some type of shopping for them and maybe vocational training for returning vets

### What uses are missing from the Grand Island area that could be accommodated on site?

- High end business/commercial park; lake/water sports
- I think a special school for advanced high school students specializing in chemistry, math
- Large football stadium with adequate parking
- This land is to be used for another national cemetery for veterans!
- Renovate the buildings, dorms, med care, bowling alley
- Veterans input!
- Open minded thinking
- Small assisted living housing for vet for handicapped
- Military museum, vet's housing, large memorial
- Technology park with good paying jobs
- Low cost housing for veterans
- If Custer Ave. went north and was connected to Webb Rd. north of the cemetery, the 1/2 of the frontage along Capital Ave. could be developed as a running course in partnership with GIPS.
- Affordable housing for veterans, educational training for vets
- Center to address veterans physical needs as well as emotional needs
- Handicapped accessible park areas
- We need housing especially for veterans. This is a perfect area for that.
- Small apartments for vets
- RV park
- Higher education
- Housing for family, job opportunities for vets, build houses using vets to learn a skill
- Veteran apartments

### What are the key development and redevelopment opportunities?

- The wishes of the veterans
- Post secondary education
- Has any thought been given to providing housing for veterans or at least to giving any age of veterans priority for such housing
- We need our vets here in Grand Island with an assisted living facility
- Save historical buildings and make a museum of them
- Planned multiuse park - recreation, office, green space, veteran's legacy
- High school academy
- Keeping the veterans in mind since the land was originally given to the State for the veterans home
- Memorial park and housing or rehab center for veterans
- Go big or go home - make it a massive memorial park with a very large lake
- Walkable downtown type area like the Lincoln Haymarket
- Expanding Veterans Sport Complex
- Keep the vets home here. Show your support.
- It seems the City can't wait to get its hands on this ground. Now we veterans know how the American Indians must have felt!
- Missing middle housing
- Have a memorial park between Veterans Home and cemetery to honor WWI, WWII, Korean, Vietnam, and all other veterans
- The existing veterans home buildings should be added to the National Registry and not touched
- Save the historic buildings! Save the lake! Save the campus! Build housing exclusively for veterans, homeless, disabled, or elderly vets.
- Veteran housing
- Veteran - exercise and fishing facility, homeless and half way housing
- Save the campus with the buildings and walkways, reuse as much as possible for direct services affecting veterans! Honor the past of the home
- Please keep the historic buildings
- Veterans home land is for the veterans period! Make it into a home for homeless veterans and disabled veterans.
- Use it as a veterans training center for new skills
- Affordable housing
- Higher education with mixed uses with expanded veterans memorial
- Capturing the Hwy 281 frontage and entrance into the City
- Develop veterans education center; keep Memorial park and Vets Club.

### What are the key hurdles to development and redevelopment?

- City and budget
- The Mayor and City Council
- Lack of funding
- The Mayor
- Tunnel vision
- Listen to what the people want
- Overcome the EDC's desire to develop and commercialize
- Listen to what the people want as we are speaking for our veterans
- City forming a committee with veterans to listen to the veterans
- Biggest hurdle is the City administration not listening to the veterans
- We need to listen to the veterans; instead of these capital interests
- We have scads of youth ballfields in town of several various games. We don't need more!!
- Politics - the vets decide how to use the area for vets
- Not looking at the big picture
- Short sightedness
- We need to listen to the veterans
- Thinking too small and short term; think big and long term
- Who is going to pay for upkeep? No money!
- The City is the hurdle!
- We had a very difficult time finding out about this meeting - called the mayor's office and the Veteran's service office, but they had to both call me back - they didn't know.

#### Are there infrastructure deficiencies that need to be addressed to develop the 640 acre site?

- There isn't 640 acres; use this land as was purposed for veterans land
- The veterans cemetery should be increased
- This land is to be returned to whose donated the land or the use by veterans, a cemetery for vets only!
- None that should deter a long range plan
- If they do divide into streets they should be named after veterans conflicts.
- Use rent to pay expenses
- Road access; RR traffic
- The dead veterans died thinking they would have a place forever. Given to Veterans for veterans.
- Use the rent of the field to help keep the home and keep running for future, etc.
- Don't need rec, need things housing national cemetery
- Overcoming the BNR

#### What are the opportunities for enhancing aesthetics and character of the site?

- Improving the lake area. Improve landscaping at Veterans Memorial Cemetery.
- Make Capital Ave. affected into Soldiers' and Sailors' Parkway
- Clean up lake and leave for all the veterans to use for fishing
- Memorial park honoring the veterans with statues
- Housing built by vets
- Enhance the Veterans Sport Complex
- Housing for homeless vets; job opportunities for vets
- Building a Grand Island version of New York's Central Park; no commercial development!
- Better rail line
- Use complex for education and housing of veterans
- Remove obsolete buildings
- Keep out vets who don't want to go to Kearney here; assist living for them
- Housing for 1/2 way and homeless vets

#### What site areas can or should be developed, changed, or altered?

- All but cemetery, vets club, and as much of the vets home property as possible
- Enlarge sports complex, football stadium, adequate parking
- Our veterans would love to learn a trait and learn how to help out with building a home for the homeless
- Bigger cemetery for all veterans
- Development for housing poor and homeless
- Lake could be opened up to all veterans
- No development for commercial or residential
- All areas for betterment of vets
- Use the area that the vets home is and have it developed for housing with an emphasis for housing for veterans
- All areas should be used for benefits of all veterans!
- The farm land space is enormous and makes sense to be developed in any way that will increase tax base which will serve veterans and all community.
- Only for veterans. Apartments - small "club" in the middle
- The land could expand for the cemetery for vets to be buried there.
- None
- Mixed use development - housing, office, commercial, recreational
- Housing, job training, family housing
- We need an assisted living facility for the vets
- Needs to stay for veterans needs
- None of it.

#### Are there infrastructure and transportation opportunities that should be capitalized on?

- Busing for veterans, not the handy bus
- Extend Custer Ave. to at least Hwy. 2. Then connect Custer to Webb, north of the cemetery. Possible name for that connection would be "Grand Island Home Ave."
- Love to see City public transport addressed
- Hike and bike trails
- Give it to the veterans. The farm income can help support the cost of operations.
- Can a service be offered to provide veterans a ride to visit friends in Kearney and provide rides from Kearney to the clinic in Grand Island?
- Moving GIHS ball stadium, soccer for visiting teams; wonderful. GIHS is landlocked and growing every year.

#### Are there objectionable or negative views or character that should be mitigated?

- City reflection of the land (i.e., low income residential)
- We need to use the soccer fields that were purchased specifically and our tax dollars for the expansion of the City cemetery. Not veterans ground!
- We expected some sort of organized meeting/presentation. How many times do we have to say this should be for the vets
- No more ball fields. Develop what you have not on the back of the veterans.

#### What areas on site should be protected, preserved, or enhanced?

- All
- The whole area - land, buildings, etc. should be used by vets for vets. Retraining tech job skills, house them there
- All of it!
- All for veterans
- This land and buildings should be for the veterans!
- All about veterans
- For veterans use only, not ball fields
- What do the veterans want to do?
- Use some of the existing buildings for homeless vets!
- All the historic buildings
- Cemetery, Veterans Club, county memorial
- Farm ground should be left for income for the property
- It should all be done according to what veterans want
- The Pershing Building, the lake, the gazebo
- Veteran's Cemetery larger
- Make the lake larger, many trees
- Vets cemetery, all else for community
- Use some buildings for homeless vets, preserve some buildings as part of a veteran's museum (of Neb.), preserve everything for the vet's use
- Vet's club, cemetery, existing campus
- Veteran's Sport Complex
- The frontage should be as open as possible so the cemetery comes into view for drivers heading west. City cemetery expansion could begin north of a connection between Custer and Webb, north of the memorial cemetery

## Concept Narrowing

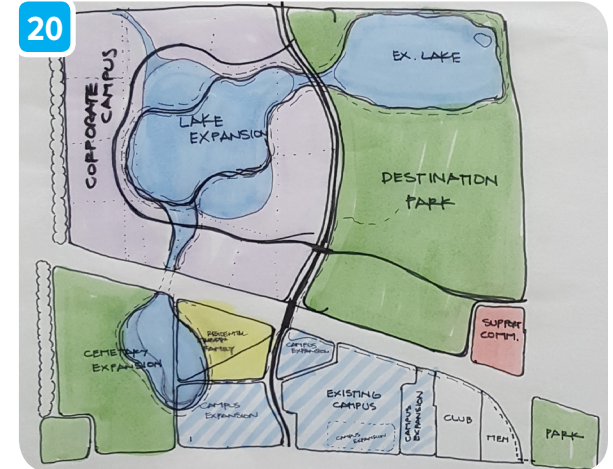
### Concept Prioritization

Day three began with a summary of the public open house by reviewing the public's post-its notes placed on each of the 24 concepts. With those comments in mind, the stakeholders were provided with six dot stickers and asked to vote for their favorite concepts. The results of that voting exercise are summarized below.

As shown in *Stakeholder Prioritized Concepts*, the top three preferred concepts were Concept #22, #18, and #20. They are shown below:

#### Stakeholder Prioritized Concepts

| Concept Number | Number of Votes |
|----------------|-----------------|
| 22             | 21              |
| 18             | 21              |
| 20             | 15              |
| 13             | 5               |
| 17             | 5               |
| 16             | 3               |
| 19             | 3               |
| 10             | 3               |
| 4              | 3               |
| 3              | 2               |
| 5              | 2               |
| 15             | 2               |
| 9              | 1               |
| 12             | 1               |
| 1              | 0               |
| 2              | 0               |
| 6              | 0               |
| 7              | 0               |
| 8              | 0               |
| 11             | 0               |
| 14             | 0               |
| 21             | 0               |
| 23             | 0               |
| 24             | 0               |



## Narrowed Concepts

The planning team assessed the prioritized concepts and proceeded to create three large-scale final concepts that integrated the preferred features from each concept. As the final session, stakeholders evaluated the three narrowed concepts and provided comments via sticky notes. The comments are listed by each concept.



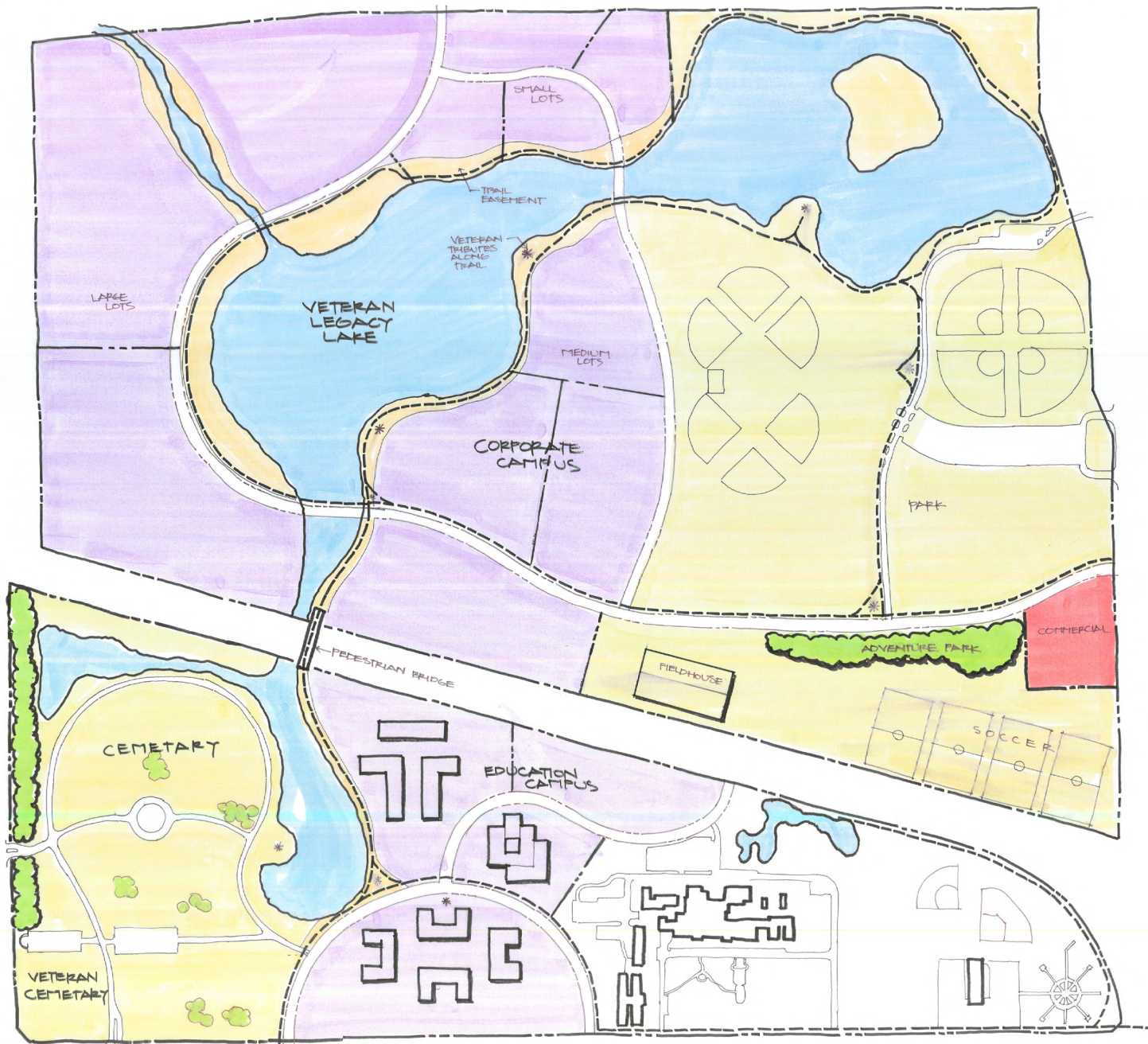
### Like

- Developing both sides of Webb Rd.
- Active waterway
- Multiple memorial points instead of a singular memorial site
- Boathouse restaurant
- Water layout
- Aquatics and fieldhouse
- Efficient sports and recreation layout
- Recreation focus
- Amount of green space

### Dislike

- Moved homes
- Development west of Webb Rd.
- Amount of shoreline to maintain
- Size of lake
- No pedestrian overpass
- Lazy lake concept
- Seems to be most expensive option

## Narrowed Charrette Concept #1



#### Like

- Variety of options
- Cemetery design that honors veterans
- Educational campus layout
- North/south water flow
- Pedestrian bridge
- Support commercial
- Balance of tax revenue generating properties and green space

#### Dislike

- Lack of green space
- Location of fieldhouse and aquatics center
- Distance between soccer fields and baseball fields

### Narrowed Charrette Concept #2



#### Like

- Appropriate lake size for commercial business park use
- Good use of community center, amphitheater, and rose garden
- Use of water and site layout
- Income from development opportunities
- Business park concept
- Pedestrian bridge
- Educational campus for potential four year liberal arts college
- Cemetery
- Balance of development, education, and green space
- Water wrapped around athletic complex
- Soccer fields
- East/west connection along Broadwell Ave.

#### Dislike

- Missing housing
- The only way to enjoy is with a drive or long bike ride

### Narrowed Charrette Concept #3

## Appendix B

# Market Feasibility Study

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**CANYON RESEARCH SOUTHWEST, INC.**

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COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

**MARKET FEASIBILITY STUDY  
GRAND ISLAND VETERANS' HOME PROPERTY  
CAPITAL AND BROADWELL AVENUES  
GRAND ISLAND, NEBRASKA**

November 2017

**MARKET FEASIBILITY STUDY  
GRAND ISLAND VETERANS' HOME PROPERTY  
CAPITAL AND BROADWELL AVENUES  
GRAND ISLAND, NEBRASKA**

November 2017

Prepared for:

Olsson Associates, Inc. dba Ochsner Hare & Hare, LLC  
1801 McGee Street, Suite 101  
Kansas City, MO 64108

Prepared by:

Canyon Research Southwest, Inc.  
475 Ellicott Street #301  
Buffalo, NY 14203

PR# 17-08-02

475 ELLICOTT STREET #301 / BUFFALO, NY 14203 / (716) 551-0655

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**CANYON RESEARCH SOUTHWEST, INC.**

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COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

November 7, 2017

Ken Boone  
Olsson Associates, Inc. dba Ochsner Hare & Hare, LLC  
1801 McGee Street, Suite 101  
Kansas City, MO 64108

RE: Market Feasibility Study  
Grand Island Veterans' Home Redevelopment; Grand Island, Nebraska

Mr. Boone;

The City of Grand Island, Nebraska has retained Olsson Associates, Inc. ("Olsson") dba Ochsner Hare & Hare, LLC to design a *Master Plan* for the redevelopment of the Grand Island Veterans' Home located at 2300 West Capital Avenue. The Grand Island Veterans' Home, originally known as the Nebraska Soldiers and Sailors Home, opened in 1887 and was the first Veterans' home in Nebraska. The Nebraska Department of Health & Human Services is currently under construction on a new Veterans' Home in Kearney, Nebraska and when completed the Grand Island Veterans' home will close with the property conveyed back to the City of Grand Island.

As a sub-consultant to Olsson, Canyon Research Southwest has prepared a *Market Feasibility Study* that evaluated the market potential and redevelopment opportunities for the 640-acre property. Attached is a summary of study findings and recommendations for your review.

Upon review of the report, should any questions arise or additional information requested, contact me directly at (716) 551-0655.

Respectfully submitted,

**CANYON RESEARCH SOUTHWEST, INC.**

Eric S. Lander, Principal

475 ELLICOTT STREET #301 / BUFFALO, NY 14203 / (716) 551-0655

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## SUMMARY OF MAJOR FINDINGS

The City of Grand Island, Nebraska has retained Olsson Associates, Inc. (“Olsson”) dba Ochsner Hare & Hare, LLC to design a *Master Plan* for the redevelopment of the Grand Island Veterans’ Home located at 2300 West Capital Avenue. The Nebraska Department of Health & Human Services is currently under construction on a new Veteran’s Home in Kearney, Nebraska and when completed the Grand Island Veterans’ home will close with the property conveyed back to the City of Grand Island.

To assist in the master planning process Canyon Research Southwest has prepared a *Market Feasibility Study* that evaluates the market potential and redevelopment opportunities for the 640-acre property. The report’s major findings are summarized in the text below.

### **Economic and Demographic Indicators**

The City of Grand Island is a rural community located in central Nebraska. A community’s changing population, household types, age composition, educational attainment, and income levels have a significant impact on the local housing and commercial real estate markets.

Demographic characteristics for the Grand Island MSA were provided by Esri Business Analyst, a national demographic research firm. Quantifying these demographic characteristics will assist in projecting the future demand for commercial space and residential housing.

The Grand Island MSA’s changing population demographics, growing senior population, and above average share of households earning less than \$25,000 annually suggests a rising demand for affordable rental and for-sale housing and senior housing. The growth in move-up and luxury housing will be modest. The region’s below average educational levels place constraints on attainable incomes, housing values, homeownership levels, and demand for commercial space.

The loss in jobs over the past decade within the Grand Island MSA has placed a constraint on the demand for commercial and industrial space. The local economy is dominated by manufacturing, retail trade, and healthcare jobs with well below average levels of professional jobs in finance, insurance, real estate, technical, and management fields. The Veterans Home property has the opportunity to create a business park environment currently unavailable in the Grand Island area with the potential to attract more value added businesses and jobs.

### **Population Growth Trends**

Population growth is a key component for generating continued demand for retail space as well as for-sale and rental housing.

Since 1990, the Grand Island MSA has experienced steady population growth. From 1990 to 2010 the metro population increased by 13.8 percent to 81,850 residents. The current population of the Grand Island MSA is 86,970, up 6.3 percent since 2010. By 2030 the population is projected to increase by 10.7 percent to 96,273 residents. This population base is sufficient to

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support a diverse retail market with continued population growth fueling additional demand for retail goods and services, commercial space as well as new residential housing units.

### **Household Composition**

Household formation and the mix of household types have a direct impact on the composition of retail sales and housing types. According to the U.S. Census Bureau, during 2010 a reported 31,535 households resided in the Grand Island MSA with an average household size of 2.57 persons. Households with one person accounted for 27.1 percent of all households with 33.8 percent of households having children present. Married couple families accounted for 52.3 percent of all households, of which 23.1 percent had related children.

These market area household composition characteristics would suggest a propensity for detached single family housing and above average retail expenditures for household furnishings, groceries, clothing and accessories, sporting goods, books and other family-related goods and services.

### **Population Age Distribution**

Age is unquestionably an important factor in consumer identity, since consumption patterns and financial situation change significantly throughout an individual’s lifetime. Change in the relative proportions of age groups in the Grand Island MSA is expected to have an important impact on the retailing and housing industries.

From 2017 through 2022, the Grand Island MSA population is forecast to grow by 3.9 percent, adding 3,430 new residents. Over the five year timeframe the number of young adults age 20 to 34 years is forecast to decline by 179 residents with the empty nester population declining by 459 residents. Absolute population gains are forecast to be the largest for the elderly (2,433 residents), children (638 residents), and family/working adults (629 residents). These shifts in the age of the market area population will impact the future demand for retail goods, personal services, and housing.

### **Household Income Distribution**

A market area’s purchasing power is a function of consumer population and income levels. As a market area’s incomes rise the more retail expenditures are supported.

The current median household income for the Grand Island MSA of \$66,245 exceeds both \$55,391 for Nebraska and \$55,775 for the United States. From 2017 to 2022 the forecast growth in Grand Island’s median household income of 9.4 percent is expected to lag behind that of 14.5 percent for Nebraska as a whole. By 2022, the median household income for Grand Island and Nebraska are forecast to be similar.

High-income households with incomes of \$100,000 or more account for 15.8 percent of all households in the Grand Island MSA, compared to 23.3 percent of Nebraska households. These high income households represent potential demand for luxury housing and the ability to support above average retail expenditures on such consumer items as food, personal services, apparel, household furnishings, entertainment, automobiles and healthcare.

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### **Educational Attainment**

Higher educational levels for a market area population generally translate to higher income levels and retail expenditures. The demand for office space improves at higher educational attainment levels as more residents are more likely to be employed in professional service and medical professions.

When compared to the statewide average the Grand Island MSA population is less educated. To elaborate, 32.7 percent of Grand Island MSA residents age 25 years and over, a high school degree or GED is the highest level of educational attainment, compared to 26.7 percent for the State of Nebraska. A reported 20.0 percent of residents within the Grand Island MSA have attained a bachelor's or advanced degrees, compared to 30.6 percent statewide and 30.0 percent nationally.

The Grand Island MSA's below average educational attainment levels translate into lower than average wages, reduced retail expenditures, and below average spending on such retail categories as personal services, apparel, household furnishings, entertainment, automobiles and healthcare. The educational attainment levels may also limit the demand for professional office space.

### **Employment Trends**

Since gains in employment generally fuels growth in population, income and retail expenditures, job growth is a reliable indicator of general economic conditions and demand for housing and commercial space.

After peaking in 2008, total employment in the Grand Island MSA declined during 2009 and 2010 in response to the national recession. Job growth rebounded from 2011 to 2013 but failed to match the pre-recession levels. Job loss resumed in 2014 and by 2016 total employment was at its lowest level since 2005. Stagnant or declining employment levels adversely impacts commercial and industrial space absorption.

Compared to the statewide employment composition, Hall County supports an above average share of construction; manufacturing; retail trade; and transportation and warehousing. Sectors that Hall County lags include finance, insurance and real estate; professional, scientific and technical services; management, administrative and support services; and educational services.

### **Athletic Facilities Market**

The City of Grand Island operates the Veterans Athletic Complex within the northeast quadrant of the Veterans' Home property. The park features four baseball fields, three adult soccer fields, concessions, restrooms, and parking. Future expansion plans for the park call for the construction of additional baseball and soccer fields.

The Grand Island Parks & Recreation collectively operates 18 baseball/softball fields and four soccer fields. Based on standards published by the National Recreation and Park Association, Grand Island is under-supplied by five soccer fields with the supply-demand balance for baseball fields at equilibrium. The shortage of local soccer fields suggests the Veterans Athletic Complex can easily support the construction of additional soccer fields. While the national standards

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indicate no demand for additional baseball fields currently exists in Grand Island, the six planned new fields will enable the Veterans Athletic Complex to host local and regional baseball and softball tournaments, thus servicing an expanded geographic trade area. Therefore, the findings of this study conclude that sufficient demand exists to warrant the construction of additional baseball and soccer fields within the Veterans Athletic Complex.

### **Competitive Retail Market**

The Veterans' Home property is not located within one of Grand Island's existing commercial corridors. The Highway 281 corridor is positioned approximately one-quarter mile to the west that hosts several large-scale shopping centers occupied by such prominent national retailers as Walmart, Sam's Club, Dillard's, JC Penney, Sears, Best Buy, Kohl's, and TJ Maxx, Home Depot.

Grand Island serves as a regional shopping destination that supports well above average retail sales volumes. Throughout the past five fiscal years sales tax receipts collected by the City of Grand Island have increased by 12.6 percent. By fiscal year 2015-16 taxable receipts reached \$16.4 million, equating to taxable retail sales of approximately \$1.1 billion.

Grand Island's pull factor is estimated at 2.02, translating into a retail sales capture at a rate equivalent to twice that of the statewide average. This pull factor suggests that Grand Island attracts half its customers and retail sales from outside the city boundaries.

Despite a retail sales surplus, the Grand Island MSA is capable of supporting additional retail sales for several retail categories. Within the Grand Island MSA those retail categories capable of supporting additional sales include furniture; grocery stores; beer, wine, and liquor stores; health and personal care stores; jewelry and luggage stores; books and music stores; and food services and drinking places. Again, Grand Island's strong retail pull factor yields well above average retail sales volumes and the potential to support additional retail sales.

The Grand Island MSA trade area possesses a retail sales surplus of \$210 million, suggesting the inability to support additional new retail space supply. By 2030, despite a forecast growth in annual retail sales of over \$175 million, a continued retail surplus will restrict the ability to feasibly support additional construction of new commercial space.

The site evaluation determined that the Veterans' Home property is not an appropriate location for future anchored shopping center development. While the property offers the necessary size, visibility, accessibility, exposure, and trade area demographics, site characteristics that hamper the property as a viable anchored shopping center site include the absence of a commercial corridor location and the lack of section-line corner development sites. Viable retail formats associated with the Veterans' Athletic Complex, lake and opens space network, and business park campus may include food and beverage establishments and businesses services housed in small freestanding retail buildings or incorporated into multi-tenant office and commercial buildings.

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## **Employment-Related Market**

Employment-related businesses operating in the Grand Island MSA include 399 professional services businesses, 185 health services businesses, and 563 industrial-based businesses, accounting for 28.9 percent of all businesses. Collectively, these 1,147 employment-related businesses support 18,934 jobs, or 38.2 percent of the MSA total. Leading professional businesses in the Grand Island MSA include real estate, insurance, and banks and lending institutions. Industrial-based businesses include transportation, wholesale trade, manufacturing, communications, and utilities.

When compared to the State of Kansas, the Grand Island MSA supports an above average concentration of banking, manufacturing, and transportation businesses. The higher dependence on manufacturing and transportation stems from Grand Island's central location and convenient access to highways, rail, and air service. Those business sectors where the Grand Island supports a below average percentage of businesses include insurance, real estate, and healthcare.

Six industrial parks are currently being actively marketed in the Grand Island area to prospective businesses. Approximately 200 acres remains available for future development within the two actively developing industrial parks with the four undeveloped parcels of industrial land collectively possessing approximately 1,500 acres of raw land.

From 2017 through 2030 the Grand Island MSA is projected to support the demand for approximately 68,000 to 140,000 square feet of professional office space; 167,400 to 186,000 square feet of medical office space; and 985,000 to 1.18 million square feet of industrial space.

Future employment-related redevelopment opportunities for the Veterans' Home property include a master planned business park designed to support a mix of professional office, medical office, technology, commercial, and recreational uses. Such development would distinguish itself from active industrial parks in Grand Island by providing a more upscale urban environment capable of attracting higher value-added businesses. Benefits of the property for such employment-related development include sufficient land area to accommodate master planning, adequate access and infrastructure, and the ability of on-site land uses to enhance the attractiveness of the property to businesses.

## **Residential Housing Market**

The Grand Island MSA housing stock totals 36,023 dwelling units operating at an overall occupancy rate of 92.1 percent. Of the total housing stock owner-occupied units account for 61.2 percent with renter-occupied at 30.9 percent.

The Grand Island MSA's housing stock is relatively old with nearly two-thirds of the existing inventory built prior to 1960. The oldest housing built prior to 1940 accounts for 20 percent of the MSA's total housing stock, or 6,340 dwelling units. Newer housing built since 2010 represents just 4.0 percent of the MSA's total inventory, or only 1,268 dwelling units.

The Grand Island MSA supports a strong demand for affordable housing for both owner-occupied and rental housing. Nearly 45 percent of owner-occupied housing units possess a monthly cost of just \$300 to \$799 with just 6.3 percent having a cost of \$2,000 or more per

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month. The average monthly cost for owner-occupied housing in the Grand Island MSA is just \$788. Rental housing in the Grand Island MSA supports even a higher percentage of affordable housing. Over two-thirds of all rental housing possesses monthly housing costs of under \$800. The median renter-occupied housing cost is just \$682.

From 2017 through 2030 the Grand Island MSA population is forecast to increase by 9,303 residents, equating to the demand for 3,620 new occupied housing units. Given the region's household income levels and existing housing stock, the housing demand is estimated to be segmented 65 percent owner-occupied and 35 percent renter-occupied.

The Veterans' Home property possesses the location and site characteristics to facilitate construction of single family subdivisions and/or apartment communities. The demographic characteristics within the Grand Island MSA are also representative of the primary target market for both for-sale and rental housing.

## **Study Conclusions and Recommendations**

Based on the findings of the *Market Feasibility Study*, potential redevelopment opportunities for the Veterans' Home property are identified. Study recommendations include the following:

- Identify appropriate mix of land uses that could take advantage of site's location, physical characteristics, and existing land uses; and
- Quantify reasonably achievable absorption rates for new development.

## **Recommended Land Use Mix**

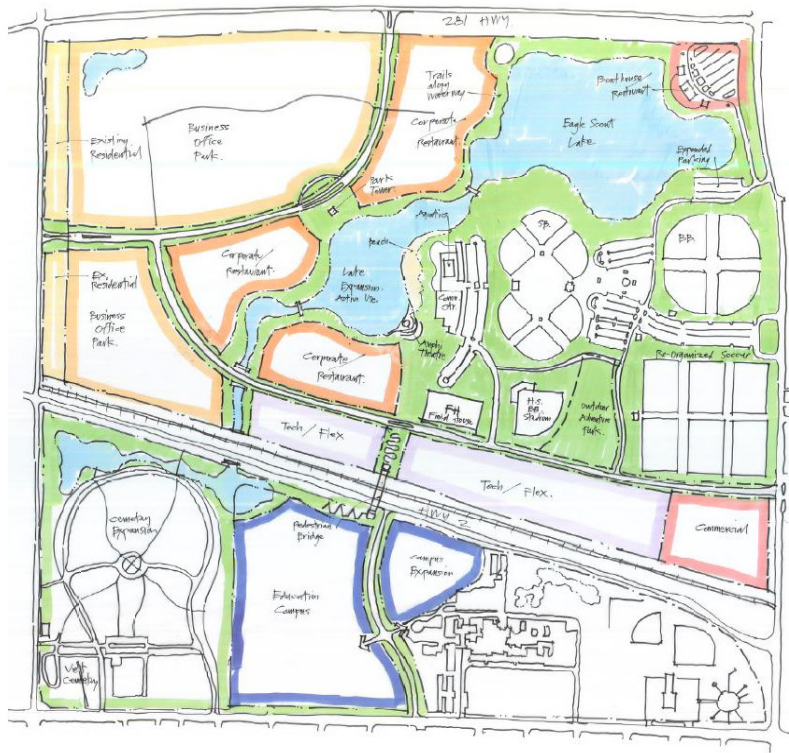
The Veterans' Home property's large inventory of land, location at the edge of urban growth, utility infrastructure in place, and existing buildings and recreational facilities create a unique opportunity to promote comprehensive planning and mixed-use development. The priority of the master plan should be to foster economic development through attracting more value added enterprises and jobs. The conceptual plan outlined on the following page provides a context from which to discuss the land use recommendations for the Veterans' Home property.

The Veterans' Home property offers the locational and site characteristics to accommodate mixed-use development. Based on the findings of the *Market Feasibility Study* prospective land uses include an athletic complex, business park campus, educational campus, limited retail, and recreation/open space.

A goal of the master plan should be to create a major sports and recreation complex capable of catering to local and regional soccer, baseball and softball teams, leagues and tournaments, serving as an economic engine. The Veterans' Athletic Complex's master plan calling for expansion of the athletic and support facilities will enable the facility to support an expanded geographic trade area and promote economic development. As part of the expansion plans the existing lake should be enlarged and a trail network incorporated. These improvements will both enhance Grand Island's quality of life, but create a unique setting for establishing employment-related uses on the property.

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Excellent opportunity to create a unique business park campus environment that elevates what currently exists in the market. The most suitable location for a business park campus is at the northwest quadrant of the property, providing sufficient parcel size, adequate visibility, and convenient access to U.S. Highway 281. Expansion of the existing lake and addition of a trail network into the business park campus site will create a unique setting for employment-based development currently not available in the Grand Island MSA. Prospective tenants would include professional office, medical office, light industrial, and limited retail businesses.

A possible goal of the Veterans' Home master plan is to create an opportunity to link on-site educational training with employers and jobs. The benefits would include improving the workforce, retaining residents, and attracting new businesses. Attracting a 4-year university campus onto the property may not be viable, but a small annex campus specializing on trades and next generation professions may be. The Career Pathways Institute trains high school students in a variety of trades and is an excellent example of the type of educational facility that could be expanded on at the property. An appropriate location for an educational campus would

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be along the north side of Capital Avenue immediately east of the Veterans' Cemetery. Adaptive re-use of some of the existing buildings should also be evaluated.

The *Market Feasibility Study* determined that the Veterans' Home property is not an appropriate location for future anchored shopping center development. Viable retail formats associated with the Veterans' Athletic Complex, lake and open space network, and business park campus may include food and beverage establishments and businesses services housed in small freestanding retail buildings or incorporated into multi-tenant office and commercial buildings.

The *Community Housing Study with Strategies for Affordable Housing 2019* identified the Veterans' Home property as a potential housing development site. While the Veterans' Home property offers all the necessary locational and site characteristics to support residential development, this land use does not present the property's highest-and-best use. As an option as well as to allow for a flexible master plan, development parcels could be designed within the business park component that could be suitable for detached or attached housing should the long-term market demand dictate such uses.

### Projected Absorption

A long-term development time horizon for the Veterans' Home property is anticipated given the large inventory of land. By providing a unique mixed-use setting the Veterans' Home property could garner above average market shares of office, medical, and light industrial space absorption. Through 2030, the Veterans' Home property is forecast to absorb an estimated 122,000 to 195,000 square feet of commercial and light industrial space.

**Forecast Commercial Space Absorption  
Veterans' Home Property; 2017-2030**

|                     | Moderate<br>Scenario | Optimistic<br>Scenario |
|---------------------|----------------------|------------------------|
| Professional Office | 13,600               | 35,000                 |
| Medical Office      | 33,500               | 46,500                 |
| Light Industrial    | 70,000               | 103,250                |
| Retail              | 5,000                | 10,000                 |
| Totals              | 122,100              | 194,750                |

Near-term redevelopment opportunities include adaptive re-use of selective buildings on the Veteran's Home campus, continued expansion of the Veterans' Athletic Complex, and construction of an expanded lake system, open space, and trail network.

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**MARKET FEASIBILITY STUDY  
GRAND ISLAND VETERANS HOME PROPERTY  
CAPITAL AND BROADWELL AVENUES  
GRAND ISLAND, NEBRASKA**

November 2017

## INTRODUCTION

Canyon Research Southwest has prepared the attached *Market Feasibility Study* that evaluates the market area demographic and competitive real estate environment influencing future redevelopment of the Grand Island Veterans' Home in Grand Island, Nebraska.

### **Study Objective and Scope of Work**

The City of Grand Island, Nebraska has retained Olsson Associates, Inc. ("Olsson") dba Ochsner Hare & Hare, LLC to develop a *Master Plan* for the redevelopment of the 640-acre Grand Island Veterans' Home located at 2300 West Capital Avenue.

As a sub-consultant, Canyon Research Southwest, Inc. has prepared a *Market Feasibility Study* evaluating future commercial, employment, residential, and recreational redevelopment opportunities for the Veterans' Home property. The study includes a Demographic Analysis of the surrounding market area as well as a Market Analysis examining the directly competitive residential, commercial, industrial, and recreational market trends.

The *Demographic Analysis* is designed to assist in quantifying future demand for both housing and commercial space. Examples of demographic characteristics discussed include population growth, household composition, age distribution, household income, and educational attainment.

The *Market Analysis* portion of the report evaluated directly competitive recreational, retail, employment, and residential market trends impacting the Veterans' Home property. The market trends for each prospective land use were evaluated by identifying directly competitive properties, quantifying such market forces as the current inventory of housing units and commercial space, construction activity, and development trends. The study also quantified the market area's short-term need for additional housing units and commercial/industrial space to determine the ability of the Veterans' Home property to support future real estate development. A site evaluation was conducted to determine the Veterans' Home property's ability to accommodate recreational, commercial, industrial, and residential development formats.

Based on the findings of the *Market Feasibility Study*, potential redevelopment opportunities for the 640-acre Veterans' Home property are identified. Study recommendations include the following:

- Identify appropriate mix of land uses that could take advantage of site's location, physical characteristics, and existing land uses; and
- Quantify reasonably achievable absorption rates for new development given current directly competitive market trends.

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## Property Description

The Veterans' Home property consists of approximately 640 acres of land located at the northern boundary of the city at the northwest corner of Capital and Broadwell Avenues in Grand Island, Nebraska. The property is bounded by Airport Road to the north, Capital Avenue to the south, Broadwell Avenue to the east and Webb Road to the west. Capital Avenue is a major arterial improved with four lanes of traffic, a left turn lane, curb and gutters, sidewalks, and overhead lighting. Old Highway 2 runs through the property. An aerial photographic on page 3 illustrates the land uses on and surrounding the Veterans' Home property.

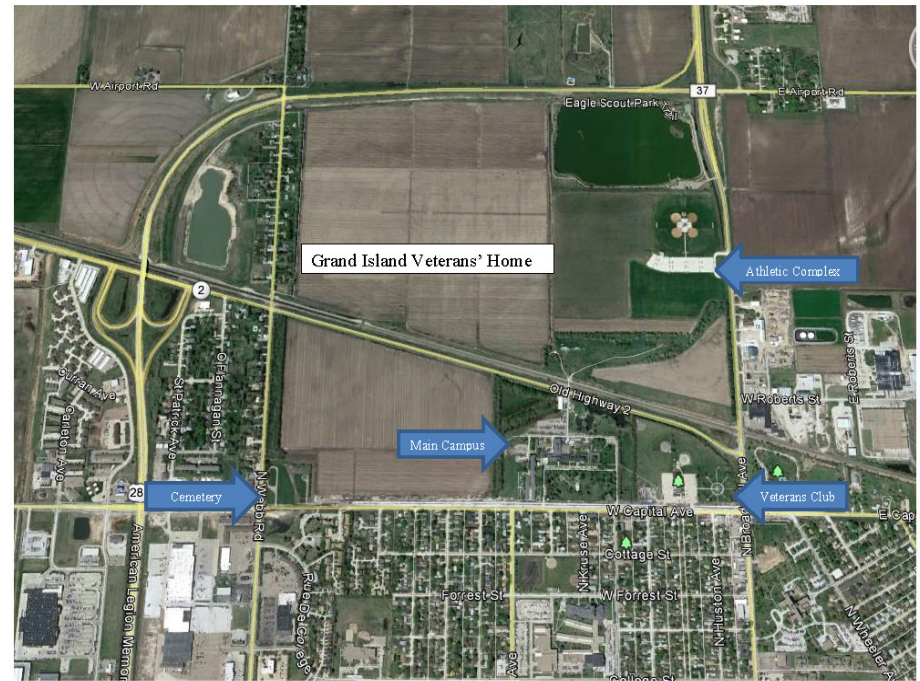
Much of the Veterans' Home property is vacant and undeveloped. Existing development on the property includes the main campus, surrounded by the Veterans' Club, Veterans' Cemetery, and Veterans Athletic Complex.

The main campus supports a host of medical and residential buildings constructed during various phases since 1887. Accessed from Capital Avenue via a loop road (American Avenue, Old Glory Road, and Soldiers & Sailors Road), principal buildings on the main campus include two single-story buildings, 3-story administration building, and 3-story Phillips/WWII Memorial along the north side of Old Glory Road and the 3-story Pershing residence hall and 1-story Anderson building (Alzheimer's unit) along the west side of American Avenue. Open space is located on the inside of the ring road and on the south side of Old Highway 2.

The Veterans Club is located at the northwest corner of Capital and Broadwell Avenues while the Veterans Cemetery is located at the northeast corner of Capital Avenue and Webb Road.

The City of Grand Island operates the Veterans Athletic Complex within the northeast quadrant of the Veterans' Home property. The park features four baseball/softball fields, three adult soccer fields, concessions, restrooms, and parking. Future expansion plans for the park call for the construction of additional baseball/softball fields and adult soccer fields. A pond is present at the southwest corner of Airport Road and Broadwell Avenue.

The Grand Island VA Medical Center is located at the southeast corner of Capital and Broadwell Avenues and includes a Community Living Center, Residential Substance Abuse Unit and a Community-Based Outpatient Clinic. The Community Living Center is a 65-bed facility. Services provided by the Community Living Center include extended care, rehabilitation, geriatric care, palliative care, respite care, supportive/restorative and long-term care, and general nursing home care.



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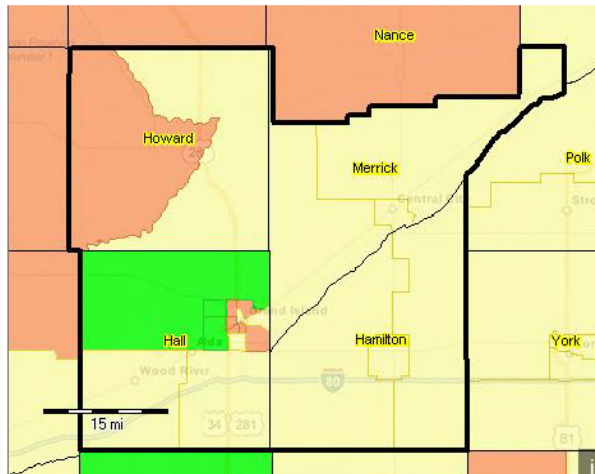
## ECONOMIC AND DEMOGRAPHIC ANALYSIS

This section of the report examines the economic and demographic factors impacting real estate development trends for the market area surrounding the Veterans' Home property. It includes an analysis of population growth trends and projections, household composition, age distribution, household income, educational attainment, and employment trends. Current demographic trends and 5-year demographic projections were provided by Esri Business Analyst, a national demographic research firm. Quantifying these economic and demographic characteristics will assist in projecting the future demand for commercial space and housing units in the market area.

### Market Area Defined

In order to examine the Veterans' Home property's prospective commercial and residential development opportunities a market area economic and demographic analysis was prepared. Market areas are usually divided into three categories or zones of influence, including primary, secondary and tertiary. Demographic characteristics immediately surrounding a site have the greatest impact of supportable real estate development patterns, with the level of influence diminishing gradually as the distance increases.

For the purpose of evaluating the Veterans' Home property's real estate development potential the market area is defined as the Grand Island MSA comprised of four counties including Hall, Hamilton, Howards, and Merrick. Market area demographic characteristics are summarized in the table on page 5.



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### Grand Island MSA Demographic Trends

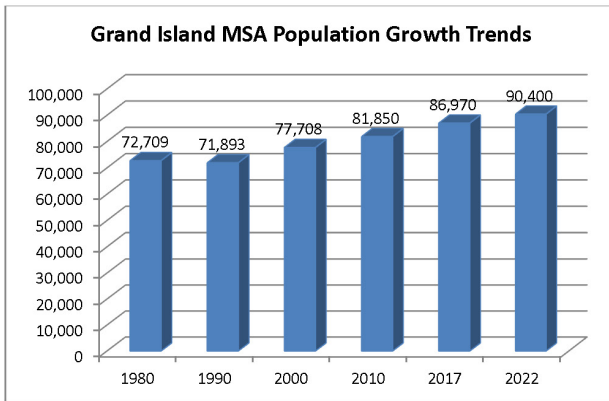
| Demographic Characteristic                                   | Demographic Characteristic |
|--------------------------------------------------------------|----------------------------|
| <b>Population</b>                                            |                            |
| 2010 Census                                                  | 81,850                     |
| 2017 Estimate                                                | 86,970                     |
| 2022 Forecast                                                | 90,400                     |
| <b>Households by Type (2010)</b>                             |                            |
| Total Households                                             | 31,535                     |
| Family Households                                            | 67.5%                      |
| Married Couple Family                                        | 53.2%                      |
| With Own Children                                            | 23.1%                      |
| Other Family (No Spouse Present)                             | 14.3%                      |
| With Own Children                                            | 10.1%                      |
| Nonfamily Households                                         | 5.4%                       |
| <b>Distribution of Population by Age (2017)</b>              |                            |
| 0-14 Years                                                   | 18,194                     |
| 15-19 Years                                                  | 5,448                      |
| 20-34 Years                                                  | 15,837                     |
| 35-44 Years                                                  | 10,278                     |
| 45-64 Years                                                  | 22,617                     |
| 65+ Years                                                    | 14,596                     |
| <b>Distribution in Household Income (2017)</b>               |                            |
| Less than \$15,000                                           | 10.3%                      |
| \$15,000 - \$24,999                                          | 11.6%                      |
| \$25,000 - \$34,999                                          | 10.6%                      |
| \$35,000 - \$49,999                                          | 16.4%                      |
| \$50,000 - \$74,999                                          | 20.7%                      |
| \$75,000 - \$99,999                                          | 12.7%                      |
| \$100,000 - \$149,999                                        | 10.7%                      |
| \$150,000 - \$199,999                                        | 3.4%                       |
| \$200,000+                                                   | 2.7%                       |
| Median Household Income                                      | \$50,882                   |
| <b>Educational Attainment for Residents 25+ Years (2017)</b> |                            |
| Total                                                        | 58,385                     |
| Less than 9th Grade                                          | 6.0%                       |
| 9th - 12th Grade, No Diploma                                 | 7.5%                       |
| High School Graduate                                         | 29.7%                      |
| GED/Alternative Credential                                   | 3.0%                       |
| Some College, No Degree                                      | 24.2%                      |
| Associate Degree                                             | 9.6%                       |
| Bachelor's Degree                                            | 13.5%                      |
| Graduate/Professional Degree                                 | 6.5%                       |

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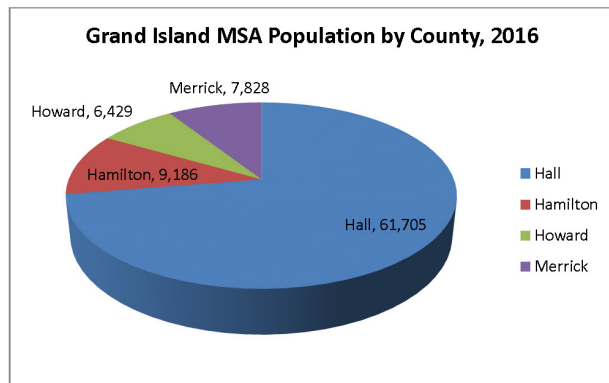
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## Population Growth Trends

Population growth is a key component for generating continued demand for commercial space and housing. Since 1990, the Grand Island MSA has experienced steady population growth. From 1990 to 2010 the metro population increased by 13.8 percent to 81,850 residents. The current population of the Grand Island MSA is 86,970, up 6.3 percent since 2010. By 2022 the population is projected to increase by 3.9 percent to 90,400 residents. This population base is sufficient to support a diverse retail market with continued population growth fueling additional demand for retail goods and services, commercial space as well as new residential housing units.



With 61,705 residents, Hall County supports over 72% of the Grand Island MSA population. Hamilton County is the second largest population center with 9,186 residents, or nearly 11% of the MSA population.



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## Household Composition

Household formation and the mix of household types have a direct impact on the composition of retail sales and housing types. According to the U.S. Census Bureau, during 2010 a reported 31,535 households resided in the Grand Island MSA with an average household size of 2.57 persons. Households with one person accounted for 27.1 percent of all households with 33.8 percent of households having children present. Married couple families accounted for 52.3 percent of all households, of which 23.1 percent had related children.

When compared to statewide averages, the Grand Island MSA population possesses a below average number of one person households and above average number of married couple households with children present.

These market area household composition characteristics would suggest a propensity for detached single family housing and above average retail expenditures for household furnishings, groceries, clothing and accessories, sporting goods, books and other family-related goods and services.

### **Grand Island MSA Households by Type – 2010**

| Household Type                   | Grand Island MSA | % of Total    |
|----------------------------------|------------------|---------------|
| Households with 1 Person         | 8,546            | 27.1%         |
| Households with 2+ People        | 22,989           | 72.9%         |
| <b>Total Households</b>          | <b>31,535</b>    | <b>100.0%</b> |
| Family Households                | 21,286           | 67.5%         |
| Married Couple Family            | 16,493           | 52.3%         |
| With Own Children                | 7,285            | 23.1%         |
| Other Family (No Spouse Present) | 4,509            | 14.3%         |
| With Own Children                | 3,185            | 10.1%         |
| Nonfamily Households             | 1,703            | 5.4%          |
| All Households with Children     | 10,659           | 33.8%         |
| Multigenerational Households     | 851              | 2.7%          |
| Unmarried Partner Households     | 2,050            | 6.5%          |
| Average Household Size           | 2.57             |               |
| Average Family Size              | 3.14             |               |

Source: Esri Business Analyst.

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## Population Age Distribution

The Grand Island MSA population for 2017 and 2022 are summarized in the table below by six primary age groups, including children (0-14 years), adolescent (15-19 years), young adults (20 to 34 years), family/working adults (35-44 years), empty nesters (45-64 years) and elderly (65+ years). Each of the six age groups possesses distinctively different consumption and housing needs.

**Grand Island MSA Distribution of Population by Age**

| Age Group               | 2017<br>Estimate | % of<br>Total | 2022<br>Forecast | % of<br>Total | 2017-22<br>Change | %<br>Change |
|-------------------------|------------------|---------------|------------------|---------------|-------------------|-------------|
| <b>Grand Island MSA</b> |                  |               |                  |               |                   |             |
| 0-14 Years              | 18,194           | 20.9%         | 18,832           | 20.8%         | 638               | 3.5%        |
| 15-19 Years             | 5,448            | 6.3%          | 5,816            | 6.4%          | 368               | 6.8%        |
| 20-34 Years             | 15,837           | 18.2%         | 15,658           | 17.3%         | -179              | -1.1%       |
| 35-44 Years             | 10,278           | 11.8%         | 10,907           | 12.1%         | 629               | 6.1%        |
| 45-64 Years             | 22,617           | 26.0%         | 22,158           | 24.5%         | -459              | -2.0%       |
| 65+ Years               | 14,596           | 16.8%         | 17,029           | 18.8%         | 2,433             | 16.7%       |
| <b>Totals</b>           | <b>86,970</b>    | <b>100.0%</b> | <b>90,400</b>    | <b>100.0%</b> | <b>8,765</b>      | <b>3.9%</b> |

Source: Esri Business Analyst.

Age is unquestionably an important factor in consumer identity, since consumption patterns and financial situation change significantly throughout an individual's lifetime. Change in the relative proportions of age groups throughout the United States is expected to have an important impact on the retailing and housing industries.

From 2017 through 2022, the Grand Island MSA population is forecast to grow by 3.9 percent, adding 3,430 new residents. Over the five year timeframe the number of young adults age 20 to 34 years is forecast to decline by 179 residents with the empty nester population declining by 459 residents. Absolute population gains are forecast to be the largest for the elderly (2,433 residents), children (638 residents), and family/working adults (629 residents). These shifts in the age of the market area population will impact the future demand for retail goods, personal services, and housing.

Children ages 0 to 14 years aren't generally consumers per say, but their presence within a household generates retail expenditures on such items as apparel and accessories, groceries, and consumer electronics. From 2017 to 2022 the population of children ages 0 to 14 years residing in the Grand Island MSA is forecast to increase by 638 residents. By 2022, children are estimate to be the second largest demographic group within the Grand Island MSA with 18,832 residents, representing a significant consumer group.

The adolescent population ages 15 to 19 is key for supporting the sales of apparel and accessories, groceries, sporting goods, music, consumer electronics, eating and drinking places, and general merchandise. By 2022, an estimated 5,816 adolescents will reside within the Grand Island MSA, up 6.8 percent of the current level.

Young adults aged 20 to 34 years generally are either college aged or are new to the workforce. These tech savvy young adults are heavy consumers of electronics, apparel and accessories, entertainment, and rental housing. By 2022, the young adult population within the Grand Island MSA is forecast to decline by 179 residents to a 17.3 percent market share. Despite the decline in population young adults will continue to be major consumers of retail goods and rental housing.

The population ages 35 to 44 are in their child raising and principal consumer years, with expenditures favoring hardware; furniture and home furnishings; home electronics; department stores; and eating and drinking places. This age group is more tech savvy than the baby boomer generation and is more apt to participate in online shopping. By 2022, the population of this age group within the Grand Island MSA is forecast to increase by 629 residents which is expected to have a positive impact on sales of home furnishings and entertainment. By 2022, this age group will account for 12.1 percent of the market area population.

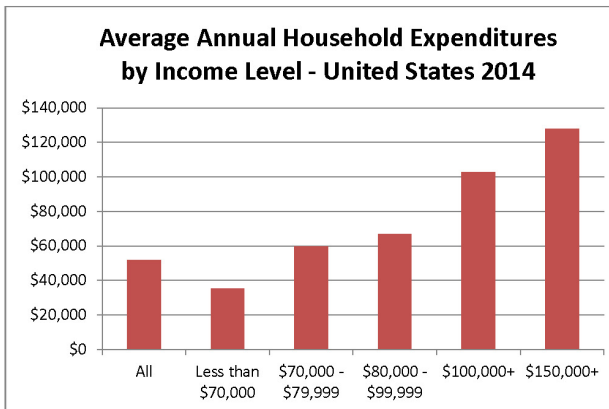
Among the six major age groups, those ages 35 to 64 possess the highest incomes and per capita consumer spending levels. According to the U.S. Department of Labor, people ages 35 to 64 possess an annual income 51 percent greater than those under the age of 35 years.

From 2017 to 2022 the population of empty nesters ages 45 to 64 years within the Grand Island MSA is forecast to decline by 459 residents. People aged 45+ years are generally less consumers of apparel, consumer electronics, furniture, home furnishings and entertainment than are younger consumers.

According to the U.S. Department of Labor, per capita retail expenditures by seniors 65+ years old is 18 percent lower than those under the age of 35 years and 41 percent lower than people ages 35 to 64 years. From 2017 to 2022 the population of residents 65+ years of age within the Grand Island MSA is forecast to increase by 16.7 percent, adding 2,433 residents. The growing senior population will generate increased demand for medical goods and services as well as senior housing.

## Household Income Distribution

A market area's purchasing power is a function of consumer population and income levels. According to the U.S. Census Bureau *Average Annual Expenditures of all Consumer Units by Income Level 2014*, average annual expenditures increased from \$35,438 for incomes of less than \$70,000 to a high of \$127,836 for incomes exceeding \$150,000. Therefore, it can be concluded that as a market area's incomes rise the more retail expenditures are supported.



The table on the following page summarizes household income estimates for the Grand Island MSA published by Esri Business Analyst.

Esri Business Analyst estimated the current median household income for the Grand Island MSA of \$66,245 exceeds both \$55,391 for Nebraska and \$55,775 for the United States. The higher income levels may result in above average per capita retail expenditures. However, the Grand Island MSA's average household income lags behind both the state and national averages.

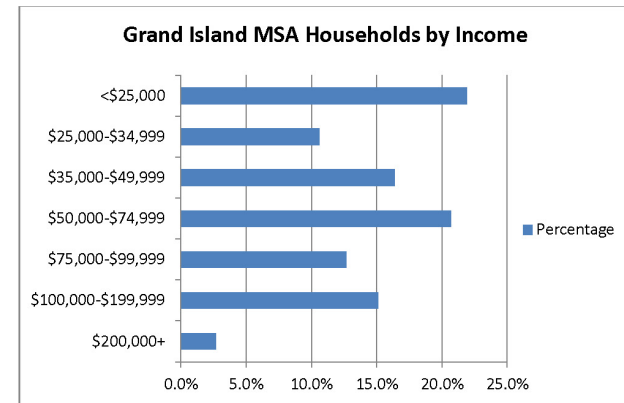
High-income households with incomes of \$100,000 or more account for 15.8% of all households in the Grand Island MSA and represent potential demand for luxury housing and retail goods and services. Households with incomes of less than \$25,000 account for 21.9% of all households, suggesting a need for affordable housing. By comparison, 23.3 percent of Nebraska households possess incomes of \$100,000 or more with 19.0 percent of households earning less than \$25,000 annually.

From 2017 to 2022 the forecast growth in Grand Island's median household income of 9.4 percent is expected to lag behind that of 14.5 percent for Nebraska as a whole. By 2022, the median household income for Grand Island and Nebraska are forecast to be similar.

## Grand Island MSA Distribution in Household Income

| Income Bracket           | 2017 Estimate | % of Total | 2022 Projection | % of Total | % Change 2017-2022 |
|--------------------------|---------------|------------|-----------------|------------|--------------------|
| <b>Grand Island MSA</b>  |               |            |                 |            |                    |
| Less than \$15,000       | 1,680         | 6.3%       | 1,551           | 5.5%       | -7.7%              |
| \$15,000 - \$24,999      | 1,815         | 6.8%       | 1,313           | 4.6%       | -27.7%             |
| \$25,000 - \$34,999      | 2,100         | 7.9%       | 1,772           | 6.3%       | -15.6%             |
| \$35,000 - \$49,999      | 4,624         | 17.4%      | 4,499           | 15.9%      | -2.7%              |
| \$50,000 - \$74,999      | 7,113         | 26.7%      | 7,737           | 27.3%      | 8.8%               |
| \$75,000 - \$99,999      | 4,227         | 15.9%      | 5,035           | 17.8%      | 19.1%              |
| \$100,000 - \$149,999    | 3,510         | 13.2%      | 4,490           | 15.9%      | 27.9%              |
| \$150,000 - \$199,999    | 992           | 3.7%       | 1,295           | 4.6%       | 30.5%              |
| \$200,000+               | 541           | 2.0%       | 626             | 2.2%       | 15.7%              |
| Median Household Income  | \$57,998      |            | \$63,464        |            | 9.4%               |
| Average Household Income | \$70,466      |            | \$77,906        |            | 10.6%              |
| Per Capita Income        | \$26,455      |            | \$29,334        |            | 10.9%              |
| <b>Nebraska</b>          |               |            |                 |            |                    |
| Median Household Income  | \$55,391      |            | \$63,450        |            | 14.5%              |
| Average Household Income | \$74,318      |            | \$85,353        |            | 14.8%              |
| Per Capita Income        | \$29,563      |            | \$33,870        |            | 14.6%              |

Source: U.S. Census Bureau and Esri Business Analyst.



## Educational Attainment

Education levels of an area's labor pool are becoming increasingly important in the ability to attract and retain knowledge-based industries as well as the ability to support above average wages. The table below provides current educational attainment levels for both the Grand Island MSA and State of Nebraska provided by Esri Business Analyst.

**Grand Island MSA  
Educational Attainment for Residents 25+ Years**

| Educational Attainment         | Grand Island MSA | State of Nebraska |
|--------------------------------|------------------|-------------------|
| Total Population 25+ Years Old | 58,385           |                   |
| Less than 9th Grade            | 6.0%             | 3.7%              |
| 9th to 12th Grade, No Diploma  | 7.5%             | 5.0%              |
| High School Graduate           | 29.7%            | 23.3%             |
| GED / Alternative Credential   | 3.0%             | 3.4%              |
| Some College, No Degree        | 24.2%            | 23.8%             |
| Associate Degree               | 9.6%             | 10.2%             |
| Bachelor's Degree              | 13.5%            | 19.8%             |
| Graduate / Professional Degree | 6.5%             | 10.8%             |

Higher educational levels for a market area population generally translate to higher income levels and retail expenditures. The demand for office space improves at higher educational attainment levels as more residents are more likely to be employed in professional service and medical professions.

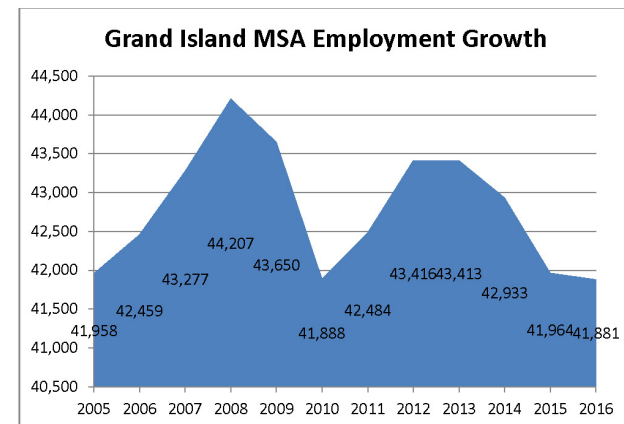
When compared to the statewide average the Grand Island MSA population is less educated. To elaborate, 32.7 percent of Grand Island MSA residents age 25 years and over, a high school degree or GED is the highest level of educational attainment, compared to 26.7 percent for the State of Nebraska. A reported 20.0 percent of residents within the Grand Island MSA have attained a bachelor's or advanced degrees, compared to 30.6 percent statewide and 30.0 percent nationally.

The Grand Island MSA's below average educational attainment levels translate into lower than average wages, reduced retail expenditures, and below average spending on such retail categories as personal services, apparel, household furnishings, entertainment, automobiles and healthcare. The educational attainment levels may also limit the demand for professional office space.

## Employment Trends

Since gains in employment generally fuels growth in population, income and retail expenditures, job growth is a reliable indicator of general economic conditions and demand for housing and commercial space. Typically, households prefer to live near work for convenience. Affordable housing costs, reduced commute times and superior quality of life can also motivate employees to relocate from elsewhere in a metropolitan area to the community where job exists.

According to statistics published by the U.S. Bureau of Labor Statistics, after peaking in 2008, total employment in the Grand Island MSA declined during 2009 and 2010 in response to the national recession. Job growth rebounded from 2011 to 2013 but failed to match the pre-recession levels. Job loss resumed in 2014 and by 2016 total employment was at its lowest level since 2005. Stagnant or declining employment levels adversely impacts commercial and industrial space absorption.



According to the *County Business Patterns 2015* published by the U.S. Census Bureau, during 2015 the leading employment sectors in Hall County included manufacturing (6,936 jobs); retail trade (5,189 jobs); health and social services (4,236 jobs); and accommodations and food services (2,718 jobs).

#### Hall County, MO Employment by NAICS Code; 2015

| Industry Classification                                 | # of Jobs     | % of Total | Nebraska Average |
|---------------------------------------------------------|---------------|------------|------------------|
| <b>Total Employment All Sectors</b>                     | <b>30,377</b> |            | <b>870,279</b>   |
| Agriculture, forestry, fishing and hunting, and mining  | --            | 0.00%      | 0.14%            |
| Construction                                            | 1,720         | 5.66%      | 5.14%            |
| Utilities                                               | --            | --         | 0.11%            |
| Manufacturing                                           | 6,936         | 22.83%     | 10.70%           |
| Wholesale trade                                         | 1,568         | 5.16%      | 4.87%            |
| Retail trade                                            | 5,189         | 17.08%     | 12.97%           |
| Transportation and warehousing                          | 1,593         | 5.24%      | 3.40%            |
| Information                                             | 305           | 1.00%      | 2.41%            |
| Finance, insurance, real estate, and rental and leasing | 1,525         | 5.46%      | 8.41%            |
| Professional, scientific and technical services         | 640           | 2.11%      | 11.37%           |
| Management, administrative and support services         | 1,518         | 5.00%      | 9.34%            |
| Health and social services                              | 4,236         | 13.94%     | 14.42%           |
| Arts, entertainment and recreation                      | 430           | 1.24%      | 1.63%            |
| Educational services                                    | 240           | 0.80%      | 2.16%            |
| Accommodations and food services                        | 2,718         | 8.95%      | 8.54%            |
| Other services (except public administration)           | 1,597         | 5.26%      | 4.23%            |

Source: U.S. Census Bureau.

Compared to the statewide employment composition, Hall County supports an above average share of construction; manufacturing; retail trade; and transportation and warehousing. Sectors that Hall County lags include finance, insurance and real estate; professional, scientific and technical services; management, administrative and support services; and educational services.

## Business Development Factors

Interviews were conducted with several local economic development, government, and real estate professionals to gain an understanding of the assets/opportunities and constraints/limitations in fostering business development in Grand Island. The bullet points below summarize the content of those interviews.

### Assets / Opportunities

- Grand Island is the largest urban area in central/west Nebraska;
- Grand Island supports a strong existing industrial base;
- Close proximity to several major metropolitan areas/markets;
- The availability of economic incentives to businesses;
- Availability of Tax Increment Financing to assist development projects;
- Sufficient utility capacity and competitive costs;
- A productive workforce and low wages;
- Affordable cost of living;
- Convenient availability of healthcare services;
- Convenient access to highways, rail, and airport;
- Good school system;
- Strong retail market supporting national and regional retailers;
- Large inventory of available industrial land;
- Low housing costs for both owner-occupied and rental housing;
- Grand Island supports a 50+ mile radius trade area for employment, business, and shopping;
- Presence of Career Pathways Institute that educates high school students in trades; and
- High real property taxes.

## **Constraints / Limitations**

- Less educated population with a below average percentage of educated professional;
- Low wages creates high demand for affordable housing and social services;
- 40% of high school students reside in households where English is a second language;
- Blue collar perception;
- The lack of a 4-year university;
- A low unemployment rate places a constraint on the available workforce; and
- Grand Island suffers from an old housing stock with a limited inventory of quality for-sale housing priced from \$150,000 to \$250,000;

Grand Island possesses ample advantages for attracting businesses, jobs, and development activity. The large manufacturing base is a favorable asset for attracting additional industry. Other community assets include convenient access, affordable cost of living, large inventory of available industrial land, adequate public utilities, availability of economic incentives, and presence of medical services. Challenges facing future economic development of Grand Island include a less educated workforce, lack of a 4-year university, and a low unemployment rate that places constraints on the available labor force.

## **Conclusions**

The City of Grand Island is a rural community located in central Nebraska. A community's changing population, household types, age composition, educational attainment, and income levels have a significant impact on the local housing and commercial real estate markets.

The Grand Island MSA's changing population demographics, large senior population, and above below average share of households earning less than \$25,000 annually suggests a rising demand for affordable rental and for-sale housing and senior housing. The growth in move-up and luxury housing will be modest. The region's below average educational levels place constraints on attainable incomes, housing values, homeownership levels, and demand for commercial property.

The loss in jobs over the past decade within the Grand Island MSA has placed a constraint on the demand for commercial and industrial space. The local economy is dominated by manufacturing, retail trade, and healthcare jobs with well below average levels of professional jobs in finance, insurance, real estate, technical, and management fields. The Veterans Home property has the opportunity to create a business park environment currently unavailable in the Grand Island area with the potential to attract more value added businesses.

## **MARKET ANALYSIS**

The *Market Analysis* portion of the study evaluated directly competitive residential, commercial, industrial, and recreational market trends impacting the Veterans' Home property. The market trends for each prospective land use were evaluated and the market area's long-term need for additional housing units and commercial/industrial space was quantified to determine the ability of the Veterans' Home property to support future real estate development. A site evaluation was conducted to determine the Veterans' Home property's ability to accommodate residential, commercial, industrial, and recreational development formats.

## **Athletic Facilities Market Analysis**

The City of Grand Island operates the Veterans Athletic Complex within the northeast quadrant of the Veterans' Home property. The park features four baseball fields, three adult soccer fields, concessions, restrooms, and parking. Future expansion plans for the park call for the construction of additional baseball and soccer fields. This section of the report provides statistics on sports participation in the United States, an inventory of athletic facilities operated by the Grand Island Parks & Recreation Department, and a facilities need assessment based on the *Park, Recreation, Open Space & Greenway Guidelines* published by the National Recreation and Park Association.

## **Sports Participation**

The vast majority of Americans participate in some fitness or recreational physical activity. The Physical Activity Council released the *2011 Sports, Fitness and Recreation Participation Overview Report* based on a survey that measured participation in 117 sports, fitness and recreation activities. The report concluded that 76 percent of Americans age six and over (216.5 million people). The report also determined that many Americans engaged in socially based exercise activities at health clubs.

The table on the following page identifies 10-year trends in sports participation among Americans seven years of age and older as reported by the National Sporting Goods Association Sports Participation in 2010. During 2010 those sports and recreation activities enjoying the highest level of participation included exercising walking (114.1 million); aerobic exercising (58.6 million); running/jogging (49.4 million); bicycle riding (39.3 million); exercising with equipment (38.6 million); and hiking (32.5 million). Sports and recreational activities that showed the greatest gains in participation from 2000 to 2010 included running/jogging (57.4%); tennis (45.7%); exercise walking (25.4%); and exercising with equipment (20.1%).

Those sports and recreational activities that will be expanded within the Veterans Athletic Complex are highlighted in gray. Participation levels in 2010 were reported at nearly 14.1 million for soccer, 14.7 million for baseball, and 8.4 million for slow pitch softball. These participation rates bode well for the need/demand for the athletic facilities planned for expansion of the Veterans Athletic Complex.

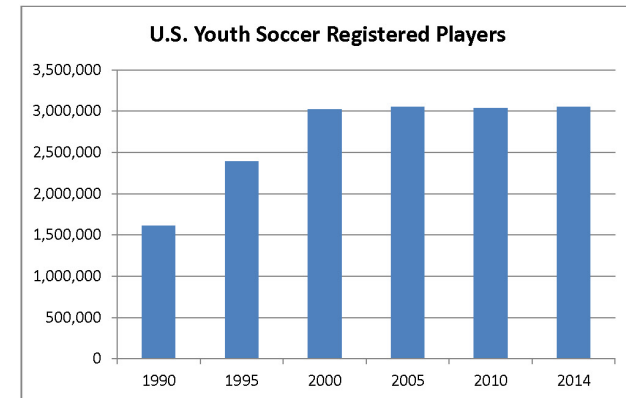
### Ten-Year History of Sports Participation Among Americans Seven Years of Age and Older

| Sport                        | Participation (in 000's) |               | % Change      |
|------------------------------|--------------------------|---------------|---------------|
|                              | 2010                     | 2000          |               |
| Exercise Walking             | 114,068                  | 90,982        | 25.4%         |
| Exercising with Equipment    | 38,618                   | 32,144        | 20.1%         |
| Swimming                     | 17,145                   | 16,141        | -1.7%         |
| Camping                      | 30,996                   |               |               |
| Bicycle Riding               | 39,320                   |               |               |
| Bowling                      | 55,877                   | 51,938        | 7.6%          |
| Aerobic Exercising           | 58,648                   | 55,960        | 4.8%          |
| Hiking (Day)                 | 32,496                   | 30,051        | 8.1%          |
| Running/Jogging              | 49,408                   | 31,398        | 57.4%         |
| Fishing                      | 38,860                   | 43,696        | -11.1%        |
| Weight Lifting               | 27,339                   | 24,800        | 10.8%         |
| Basketball                   | 26,304                   | 26,215        | 0.3%          |
| Billiards/Pool               | 39,385                   | 46,336        | -15.0%        |
| Golf                         | 26,122                   | 28,844        | -9.4%         |
| Yoga                         | 21,886                   |               |               |
| Sailing                      | 3,869                    | 4,405         | -12.2%        |
| Hunting and Firearms         | 18,212                   |               |               |
| <b>Soccer</b>                | <b>14,075</b>            |               |               |
| Table Tennis                 | 19,446                   | 12,712        | 53.0%         |
| <b>Baseball</b>              | <b>14,661</b>            | <b>15,848</b> | <b>-8.1%</b>  |
| Tennis                       | 18,903                   | 12,974        | 45.7%         |
| Backpack                     | 8,349                    | 6,637         | 9.2%          |
| <b>Softball (Slow Pitch)</b> | <b>8,429</b>             | <b>13,577</b> | <b>-37.9%</b> |
| Volleyball (Court)           | 7,346                    |               |               |
| Football (Tackle)            | 6,905                    | 8,229         | -16.1%        |
| Skateboarding                | 6,808                    | 9,859         | -30.9%        |
| In-Line Roller Skating       | 7,980                    | 21,912        | -63.3%        |
| Alpine Skiing                | 11,504                   |               |               |
| Mountain Biking              | 7,161                    |               |               |
| Archery                      | 6,319                    | 6,285         | 0.5%          |
| Snowboarding                 | 8,196                    |               |               |
| Kayaking                     | 6,465                    |               |               |
| Hunting with Bow & Arrow     | 3,908                    | 4,633         | -15.6%        |
| Water Skiing                 | 4,836                    | 8,768         | -44.8%        |
| Gymnastics                   | 4,815                    | 4,876         | -1.2%         |
| Ice Hockey                   | 2,145                    | 2,432         | -11.8%        |
| Wrestling                    | 2,089                    | 3,743         | -44.2%        |
| Cross Country Skiing         | 4,530                    |               |               |

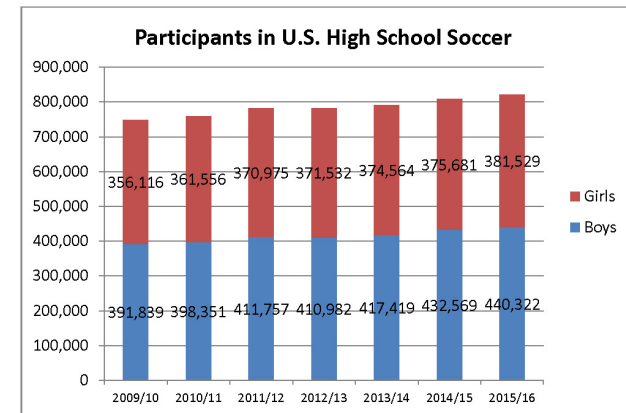
Source: National Sporting Goods Association Sports Participation in 2010.

### Soccer Participation

Over the past 25 years soccer participation in America has grown significantly and now trails only football, baseball, and basketball in nearly all statistical measures of popularity. According to *FIFA World Football Big Count*, nearly 24.5 million people play soccer at some level in the United States, second only to China. U.S. Youth Soccer published that 3,055,148 youth players officially registered with U.S. Soccer in 2014, up 89 percent since 1990. During 2014, 21,787 players in Nebraska were registered with U.S. Youth Soccer.



According to Statista, the number of participants in United States high school soccer increased from 747,955 in 2009-10 to 821,851 by 2015-16, an increase of 9.9 percent. Boy's high school soccer participation during this seven year period rose by 12.4 percent.



The increasing popularity of soccer and high participation rates in the United States bodes well for the potential of building and supporting the soccer facilities planned for the Veterans Athletic Complex.

### **Baseball and Softball Participation**

Research conducted by the Sports and Fitness Industry Association (SFIA) revealed that during 2016 baseball and softball had nearly 25 million combined individuals participating in the sports. This is the highest participation number of any sport in the United States. SFIA also reported that during 2016, overall baseball participation increased by 7.7 percent and slow-pitch softball participation increased by 8.1 percent, with casual participation in both baseball and slow-pitch softball showing the highest growth.

### **Existing Athletic Facilities**

The Grand Island Parks & Recreation Department was consulted to identify public athletic facilities in Grand Island. As summarized in the table below, the twelve existing athletic facilities operated by Grand Island Parks & Recreation collectively include 18 baseball/softball fields, four soccer fields, eight basketball courts, 16 tennis courts, and four volleyball courts.

**Grand Island Parks & Recreation Athletic Facilities**

| Park Facility             | Baseball Fields | Soccer Fields | Basketball Courts | Tennis Courts | Volleyball Courts |
|---------------------------|-----------------|---------------|-------------------|---------------|-------------------|
| Ashley Park               | 1               |               |                   |               |                   |
| Buechler Park             |                 |               |                   | 2             |                   |
| Cedar Hills Park          |                 |               | 1                 |               |                   |
| Community Fieldhouse      |                 | 1             | 2                 |               | 4                 |
| George Park               | 4               |               | 1                 | 2             |                   |
| Grace Park                | 1               |               |                   | 2             |                   |
| Lions Club Park           |                 |               | 1                 |               |                   |
| Pier Park                 | 2               |               |                   | 2             |                   |
| Ryder Park                | 6               |               |                   | 5             |                   |
| Sothman Park              |                 |               | 2                 | 1             |                   |
| Stolley Park              |                 |               | 1                 | 2             |                   |
| Veterans Athletic Complex | 4               | 3             |                   |               |                   |
| <b>Totals</b>             | <b>18</b>       | <b>4</b>      | <b>8</b>          | <b>16</b>     | <b>4</b>          |

Source: Grand Island Parks & Recreation.

### **Facilities Needs Assessment**

The Veterans Athletic Complex is designed for the construction of additional baseball and soccer fields. The lighting for the baseball fields has already been installed.

National standards are useful to ensure a minimum standard is achieved in the provision of parks and recreation areas. The *Park, Recreation, Open Space and Greenway Guidelines* published by the National Recreation and Park Association ("NRPA") are the most commonly used spatial and need standards for determining the needs and design of recreational facilities. The standards are based on a national survey of American municipalities of all sizes and geographic regions. These standards provide a measure for determining the amount of park and recreation space required to meet the needs and desires of residents and visitors.

Facility needs assessment is quantified based on the number of facilities per 1,000 residents. According to the *Park, Recreation, Open Space and Greenway Guidelines* athletic facility need standards include 1.0 baseball per 10,000 residents and 1.0 soccer field per 10,000 residents.

The 2017 population of Hall County is estimated at 61,705 people. Grand Island serves as central Nebraska's principal economic and retail center. Esri Business Analyst estimates the current population on the Grand Island MSA at 86,970 residents. Based on the *Park, Recreation, Open Space and Greenway Guidelines* the trade area can currently support 18 baseball fields, nine soccer fields, 18 basketball courts, 44 tennis courts, and 18 volleyball courts. These demand forecasts do not take into consideration tournament play originating from outside of the Grand Island MSA.

The existing supply of athletic facilities in Grand Island was compared to facility needs standards to determine whether additional athletic facilities can be supported. As the table below illustrates, Grand Island is under-supplied by five soccer fields, ten basketball courts, 28 tennis courts, and 18 volleyball courts. The shortage of local soccer fields suggests the Veterans Athletic Complex can easily support the construction of additional soccer fields. While the national standards indicate no demand for additional baseball fields currently exists in Grand Island, the six planned new fields will enable the Veterans Athletic Complex to host local and regional baseball and softball tournaments, thus servicing an expanded geographic trade area. Therefore, the findings of this study conclude that sufficient demand exists to warrant the construction of additional baseball and soccer fields within the Veterans Athletic Complex.

**Grand Island Sports Facilities Supply/Demand Analysis**

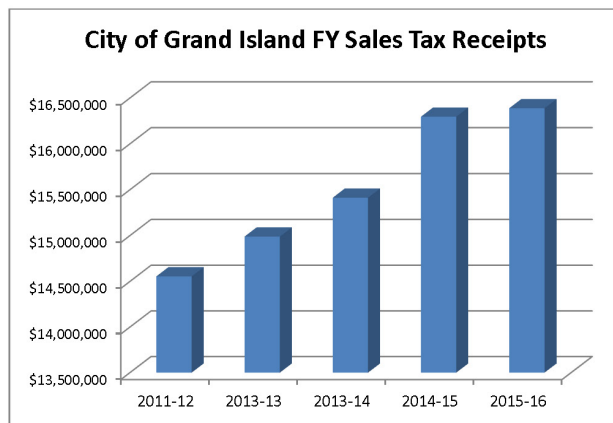
| Athletic Facility | Existing Facilities | Demand Standard | Trade Area Population | Supportable Facilities | Surplus/ Shortage |
|-------------------|---------------------|-----------------|-----------------------|------------------------|-------------------|
| Baseball Field    | 18                  | 1 per 5,000     | 86,970                | 18                     | 0                 |
| Soccer Field      | 4                   | 1 per 10,000    | 86,970                | 9                      | -5                |
| Basketball Court  | 8                   | 1 per 5,000     | 86,970                | 18                     | -10               |
| Tennis Court      | 16                  | 1 per 2,000     | 86,970                | 44                     | -28               |
| Volleyball Court  | 4                   | 1 per 5,000     | 86,970                | 18                     | -14               |

## Retail Market Analysis

The *Retail Market Analysis* portion of the report evaluates directly competitive retail market trends impacting the Veterans Home property, with the intent of quantifying future demand for commercial space and identifying possible redevelopment opportunities.

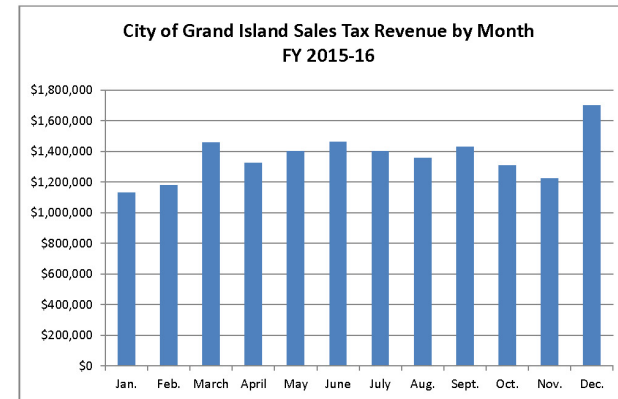
### Grand Island Retail Market Overview

The City of Grand Island provided actual sales tax receipts for fiscal years 2011-2012 through 2016-2017. The bar chart below provides an illustration of historical fiscal year trends in the City's sales tax receipts.



Throughout the past five fiscal years sales tax receipts collected by the City of Grand Island have increased by 12.6 percent. Sales tax collections for the City of Grand Island were reported at approximately \$14.6 million in fiscal year 2011-12. By fiscal year 2015-16 taxable receipts reached a high of \$16.4 million. Through the first eight months of fiscal year 2016-17 sales tax receipts were up just 0.49 percent over the same 8-month timeframe during the prior fiscal year. The steady gains in sales tax collections are an indication of Grand Island's regional retail draw.

Historically retail sales volumes in the City of Grand Island have remained relatively stable throughout the year. The bar chart on the following page depicts monthly sales tax collections for fiscal year 2015-16 (accounts for a 2-month lag from the month the sales taxes are collected and the month they are received by the City). On a quarterly basis there was little variation in sales tax collections ranging from a low of \$3.8 million during the first quarter (23.0% annual share) to a high of \$4.24 million during the fourth quarter (25.9% annual share) which is the traditional holiday season marked by above average retail sales. December generated the highest sales tax collections of \$1.7 million.



The City of Grand Island supports two principal retail corridors. Locust Avenue south of Bismark Road represents the older commercial corridor featuring a mix of chain restaurants, strip centers, and hotels. Highway 281 on the far west side of Grand Island from U.S. Highway 30 north to Capital Avenue represents the new retail corridor with large-scale shopping centers such as Northwest Commons, Eagle Run, Grand Corners, and Conestoga Mall anchored by national big-box retailers. Notable retailers operating along Highway 281 include Walmart, Sam's Club, Dillard's, JC Penney, Sears, Best Buy, Kohl's, TJ Maxx, Home Depot, and Menards. While some redevelopment activity has occurred along the south Locust Avenue Corridor, the Highway 281 corridor remains the preferred location for new retailers entering the Grand Island market.

### Highway 281 Corridor Major Retailers

| Department Stores | Major Anchors | Junior Anchors        | Restaurant Chains  |
|-------------------|---------------|-----------------------|--------------------|
| Dillard's         | Walmart       | Dick's Sporting Goods | Applebee's         |
| JC Penney         | Sam's Club    | Hibbett Sports        | Buffalo Wild Wings |
| Sears             | Home Depot    | Petco                 | Perkins            |
| Younkers          | Menard's      | Kohl's                | Red Lobster        |
|                   |               | TJ Maxx               | Ruby Tuesday       |
|                   |               | Gordmans              | Sonic              |
|                   |               | Golf USA              | Taco Bell          |
|                   |               | Ashley Homestore      | Texas Roadhouse    |
|                   |               | Best Buy              | Wendy's            |
|                   |               | Burlington            |                    |
|                   |               | Hobby Lobby           |                    |
|                   |               | Office Max            |                    |

Located on Highway 281 between State Street and Capital Avenue, Northwest Commons is a redevelopment of the original enclosed Grand Island Mall. In addition to three new outparcels, the development includes in excess of 150,000 square feet of junior anchor and shops space designed with a “main street” layout. The center is anchored by Dick’s Sporting Goods, Hibbett Sports, Shopko, Petco, Harbor freight, and Burlington (coming soon).

The Eagle Run shopping center at Highway 281 and Faidley Avenue is anchored by Home Depot and Gordmans, and Ashley Homestore. Outparcels are occupied by Buffalo Wild Wings, Olive Garden, Panda Express, Panera Bread, and Ruby Tuesday.

The 545,000 square foot Conestoga Mall located at Highway 281 and 13<sup>th</sup> Street is anchored by Dillard’s, JC Penney, Sears, Younkers, and Best Buy. Conestoga Mall is the largest regional mall between Lincoln, Nebraska and Denver, Colorado, attracting 3.7 million shoppers annually.

**Trade Area Capture**

Information about a community’s retail trade area can help assess the ability of local merchants to attract and capture the retail business of local residents. The trade area capture (“TAC”) is an estimate of the number of people who shop in the local area during a certain period. TAC assumes that local residents will buy goods at the same rate as the state average, and that the only force that causes a variation in spending patterns is income. The formula for calculating TAC is:

$$TAC = \frac{\text{Community's Actual Retail Sales}}{\text{State Per Capita Sales} \times \text{Community's Per Capita Income} / \text{State Per Capita Income}}$$

If the TAC estimate is larger than the community’s population two explanations are possible: 1) the community is attracting customers outside its boundaries or 2) residents of the community are spending more than the state average. If the estimate is smaller than the community’s population: 1) the community is losing its customers to other regions for retail purchases or 2) residents of the community are spending less than the state average.

According to the U.S. Census Bureau, Grand Island’s July 1, 2016 population was estimated at 51,517 residents with a per capita income of \$23,144. Annual retail sales and population levels equate to per capita sales for Grand Island of \$27,662.

The U.S. Census estimated the July 1, 2016 population for Nebraska at 1,907,116 residents, per capita income of \$27,822, and per capita retail sales of \$16,422.

$$\text{Trade Area Capture} = \frac{\$1,425,080,239}{\$16,422 \times (\$23,144 / \$27,822)} = 104,319 \text{ Residents}$$

The City of Grand Island’s resident population of 51,517 and estimated TAC of 104,319 residents illustrates the city’s regional retail draw. Grand Island’s large concentration of big-box retailers that operate along the Highway 281 corridor and distance to alternative shopping destinations in Lincoln and Omaha accounts for the high trade area capture.

**Retail Pull Factor**

Pull factors (“PF”) measure a community’s ability to attract shoppers, residents and non-residents alike, to make retail purchases within the community. A pull factor is a measure of the strength of a community’s retail trade, based on a comparison of local spending in relation to that of a wider geographic area (e.g. the state), with a measure of 1.0 representing a perfect balance. A pull factor greater than 1.0 indicates that the community is pulling in retail sales from beyond its boundaries and the balance of trade is favorable. Alternatively, a pull factor less than 1.0 indicates that the community is not capturing local shoppers and is experiencing retail sales leakage. Pull factors are calculated by dividing the TAC by the community’s population.

$$PF = \frac{\text{Trade Area Capture}}{\text{Community Population}}$$

Grand Island’s pull factor was calculated by dividing the TAC population of 104,319 by the estimated resident population of 51,517. The net result is a pull factor of 2.02, translating into a retail sales capture at a rate equivalent to twice that of the statewide average. This pull factor suggests that Grand Island attracts half its customers and retail sales from outside the city boundaries.

**Retail Sales Gap Analysis**

The *Retail MarketPlace Profile* published by Esri Business Analyst identifies opportunities for additional retail store types in the Grand Island MSA. The report data is derived from two major sources. The demand data is derived from the Consumer Expenditure Survey published by the U.S. Bureau of Labor Statistics while the supply data is provided by the Census of Retail trade. Retail establishments are classified into 27 industry groups in the retail trade sector and four industry groups within the food services and drinking establishments. The difference between demand and supply represents the opportunity gap or surplus available for each retail category in the specified reporting geography. When the demand is greater than the supply there is an opportunity gap for that retail category. A positive value signifies an opportunity gap, while a negative value signifies a surplus.

The *Retail MarketPlace Profile* indicates that the Grand Island MSA supports a retail sales surplus of approximately \$437 million. The surplus in sales is a result of the Highway 281 corridor’s large inventory of retail space and strong regional draw, and does not suggest additional sales aren’t supportable. The estimated retail potential and actual retail sales by retail category for the Grand Island MSA are identified in the table on the following page.

**Opportunity Gap by Retail Category  
Grand Island MSA, Nebraska**

|                                         | Demand<br>(Retail Potential) | Supply<br>(Retail Sales) | Retail<br>Gap/Surplus |
|-----------------------------------------|------------------------------|--------------------------|-----------------------|
| Total Retail Trade                      | \$1,027,016,240              | \$1,463,620,066          | <b>-\$436,603,826</b> |
| Total Retail Trade and Food & Drink     | \$1,127,729,576              | \$1,559,380,349          | <b>-\$431,650,773</b> |
| Total Food & Drink                      | \$100,713,336                | \$95,760,283             | <b>\$4,953,053</b>    |
| <b>Industry Group (Leakage/Surplus)</b> |                              |                          |                       |
| Furniture                               | \$19,397,443                 | \$15,915,443             | <b>\$3,482,000</b>    |
| Home Furnishings                        | \$6,481,679                  | \$9,515,591              | <b>-\$3,033,912</b>   |
| Electronics & Appliances                | \$36,835,098                 | \$46,083,830             | <b>-\$9,248,732</b>   |
| Building Materials                      | \$65,726,407                 | \$117,209,142            | <b>-\$51,482,735</b>  |
| Lawn & Garden                           | \$7,712,884                  | \$12,703,525             | <b>-\$4,990,641</b>   |
| Grocery Stores                          | \$168,272,493                | \$86,413,383             | <b>\$81,859,110</b>   |
| Beer, Wine & Liquor                     | \$9,579,765                  | \$4,850,962              | <b>\$4,728,803</b>    |
| Health & Personal Care                  | \$64,312,581                 | \$50,240,028             | <b>\$14,072,553</b>   |
| Clothing Stores                         | \$23,596,661                 | \$25,673,575             | <b>-\$2,076,914</b>   |
| Shoes Stores                            | \$4,733,021                  | \$10,130,295             | <b>-\$5,397,274</b>   |
| Jewelry & Luggage                       | \$7,327,707                  | \$4,629,363              | <b>\$2,698,344</b>    |
| Books & Music Stores                    | \$3,698,805                  | \$0                      | <b>\$3,698,805</b>    |
| Department Stores                       | \$132,543,952                | \$155,239,188            | <b>-\$22,695,236</b>  |
| Florists                                | \$1,705,447                  | \$2,704,038              | <b>-\$998,591</b>     |
| Office Supplies                         | \$12,119,009                 | \$5,800,511              | <b>\$6,318,498</b>    |
| Food Services & Drinking Places         | \$100,713,336                | \$95,760,283             | <b>\$4,953,053</b>    |

Within the Grand Island MSA those retail categories capable of supporting additional sales include furniture; grocery stores; beer, wine, and liquor stores; health and personal care stores; jewelry and luggage stores; books and music stores; and food services and drinking places. Again, Grand Island's strong retail pull factor yields well above average retail sales volumes and the potential to support additional retail sales.

**Retail Space Demand Estimates**

A *Retail Market Analysis* quantifies a particular trade area's potential to increase its inventory of occupied shop space over a specified period of time. This section of the study provides retail space demand estimates from 2017 to 2030 for the Grand Island MSA.

Supportable retail sales are a function of consumer population and income levels. A trade area's total income is calculated by multiplying the total trade area population by the per capita personal income. Purchasing power, or total sales potential of the trade area, is then quantified by applying average retail expenditures as a percentage of total income.

Esri Business Analyst estimated the current Grand Island MSA population at 86,970 residents and per capita income at \$25,596, yielding total personal income of approximately \$2.2 billion. Based on the U.S. retail and food services (excluding automobile and parts sales) spending rate equivalent to 30 percent of total personal income as reported by the *U.S. Census Bureau Annual Retail Trade Survey*, retail sales supportable by Grand Island MSA residents are estimated at approximately \$244 million annually. By applying the FY 2016 retail pull factor for Grand Island of 2.02, retail sales attributed to both residents and out-of-town visitors are estimated at approximately \$1.35 billion.

Retail sales for the Grand Island MSA trade area are estimated at approximately \$1.56 billion in 2016, translating into retail sales surplus of \$210 million and the inability to support additional new retail space supply. By 2030, despite a forecast growth in annual retail sales of over \$175 million, a retail surplus estimated at \$35 million will continue to restrict the ability to feasibly support additional construction of new commercial space over the next five years.

**Estimated Retail Space Demand; 2017 - 2022  
Grand Island MSA Trade Area**

| Retail Sales Formula                                                  | 2017                     | Growth<br>2017-22     |
|-----------------------------------------------------------------------|--------------------------|-----------------------|
| Resident Population                                                   | 86,970                   | 9,303                 |
| Per Capita Income                                                     | \$25,596                 | \$31,056              |
| Total Gross Personal Income                                           | \$2,226,084              | \$288,913,968         |
| % Income Spent on Goods & Food Services                               | 0.30                     | 0.30                  |
| Supportable Non-Automotive Retail Sales by Grand Island MSA Residents | \$667,825,236            | \$86,674,190          |
| Grand Island FY 2016 Retail Full Factor                               | 2.02                     | 2.02                  |
| Supportable Retail Sales by Out-of-Town Visitors                      | \$681,181,741            | \$88,407,675          |
| Total Supportable Non-Automotive Retail Sales                         | \$1,349,006,977          | \$175,081,865         |
| Less: CY 2016 Grand Island MSA Non-Automotive Retail Sales            | <b>(\$1,559,380,349)</b> |                       |
| Potential Capture of Additional Non-Automotive Retail Sales           | <b>(\$210,373,372)</b>   | <b>(\$35,291,507)</b> |
| Average Retail Sales Per Sq. Ft.                                      | \$225                    | \$273                 |
| <b>Supportable Additional Retail Space (Sq. Ft.)</b>                  | <b>0</b>                 | <b>0</b>              |

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## **Site Evaluation**

Retail developers and major retailers evaluate potential sites based on a series of site specific criteria. Common selection criteria when evaluating prospective development sites include parcel size, visibility and exposure, accessibility, traffic counts, trade area demographics, and direct competition. Using these site selection criteria the Veterans' Home property was evaluated for the potential for support retail development.

### **Parcel Size**

The Veterans' Home property consists of approximately 640 acres of land. Based on retail format criteria published by the International Council of Shopping Centers the property possesses sufficient size to accommodate development of a wide variety of shopping center formats, including strip center, neighborhood center, community center, and power center. The constraint in facilitating anchored shopping center development is that all four section-line corners possess existing land uses that will remain, including the Veterans' Cemetery at the corner of Capital Avenue and Webb Road, the Veterans' Club at Capital Avenue and Broadwell Avenue, a pond/lake at Airport Road and Broadwell Avenue, and single family housing at Airport Road and Webb Road. Old Highway 2 through the property also does not provide a viable development site for an anchored shopping center.

### **Visibility**

Visibility and exposure have a significant influence on a shopping center's achievable retail sales volumes. All shopping center types should possess major arterial frontage with lifestyle and power centers preferring a freeway or highway location. National and regional big-box retailer, restaurant, convenience store and bank chains also require major arterial frontage.

The Veterans' Home property occupies a full section of land bounded by four major arterials, including Airport Road to the north, Capital Avenue to the south, Broadwell Avenue to the east, and Webb Road to the west. In addition, Old Highway 2 runs east-west through the center of the property. Frontage onto these major arterial roads will provide the Veterans' Home property with the necessary visibility and exposure to accommodate construction of a variety of anchored shopping center formats.

### **Accessibility**

Strip centers and outparcels rely on an efficient local transportation network that typically includes a mix of major and minor arterial streets.

The Veterans' Home property location via the adjacent major arterial roads and Highway 281 one-quarter mile to the west provides the necessary local and on-site access to support anchored shopping center development.

## **Traffic Counts**

The vehicular traffic counts on arterial streets that flow past the site are important when evaluating a potential lifestyle center site. Average daily traffic counts for 2013 reported by the Nebraska Department of Transportation past the Veterans' Home property are 8,935 to 9,270 vehicles on Capital Avenue between Webb Road and Broadwell Avenue; 4,640 vehicles on Broadwell Avenue north of Capital Avenue; and 1,890 vehicles on Webb Road north of Capital Avenue.

### **Trade Area Demographics**

The Grand Island MSA supports a current population of 86,970 residents and a median household income of \$50,882. The large and growing adolescent population is sufficient for supporting the sales of apparel and accessories; groceries; sporting goods; music; home electronics; eating and drinking places; and general merchandise. The large population ages 25 to 44 are in their principal consumer years, favors hardware; furniture and home furnishings; home electronics; department stores; and eating and drinking places. The growing senior population generates demand for medical goods and services. Over 30 percent of households earn \$75,000 or more per year that is ideal for supporting above average per capita retail sales. These consumption patterns and demographic characteristics bode well for the potential of Grand Island to support a diverse retail market.

### **Competition**

The Veterans' Home property is located with the City of Grand Island that serves as central Nebraska's principal retail destination. Highway 281 located just west of the Veterans' Home property is the city's premiere retail corridor housing such major national retailers as Walmart, Sam's Club, Kohl's, JC Penney, Sears, Dick's Sporting Goods, Home Depot, Menard's, Best Buy, and TJ Maxx.

### **Conclusions**

The site evaluation determined that the Veterans' Home property is not an appropriate location for future anchored shopping center development. While the property offers the necessary size, visibility, accessibility, exposure, and trade area demographics, site characteristics that hamper the property as a viable anchored shopping center site include the absence of a commercial corridor location and the lack of section-line corner development sites. Viable retail formats associated with the Veterans' Athletic Complex and a possible on-site business park would be limited to food and beverage and businesses services housed in small freestanding retail buildings or incorporated into multi-tenant office and light industrial buildings.

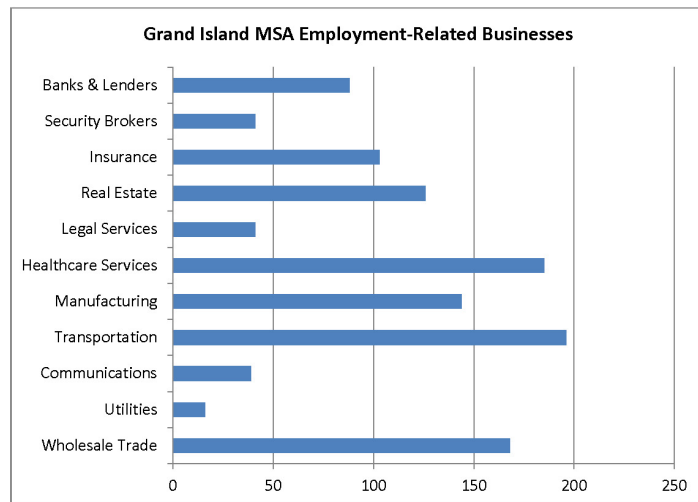
## Employment Market Analysis

This section of the study evaluates directly competitive employment-related market conditions in the Grand Island by identifying the mix of office and industrial businesses operating in the primary market area; quantifying employment-related space demand; and evaluating prospective development sites. The goal is to identify current and future opportunities to support employment-related development at the Veterans' Home property.

### Employment-Related Business Mix

According to *Esri Business Analyst*, a total of 3,975 businesses operate within the Grand Island MSA employing 49,588 workers. For the purpose of this analysis employment-related businesses are defined as professional services, healthcare services, and industrial-related businesses.

Employment-related businesses operating in the Grand Island MSA include 399 professional services businesses, 185 health services businesses, and 563 industrial-based businesses, accounting for 28.9 percent of all businesses. Collectively, these 1,147 employment-related businesses support 18,934 jobs, or 38.2 percent of the MSA total. Leading professional businesses in the Grand Island MSA include real estate, insurance, and banks and lending institutions. Industrial-based businesses include transportation, wholesale trade, manufacturing, communications, and utilities.



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The table below provides a comparison of the primary market area's professional, healthcare and industrial business mix by NAICS Code with that of the State of Nebraska. An estimated 28.9 percent of all businesses operating in the Grand Island MSA are employment-related, compared to 29.0 percent for the State of Nebraska.

When compared to the State of Kansas, the Grand Island MSA supports an above average concentration of banking, manufacturing, and transportation businesses. The higher dependence on manufacturing and transportation stems from Grand Island's central location and convenient access to highways, rail, and air service. Those business sectors where the Grand Island supports a below average percentage of businesses include insurance, real estate, and healthcare.

### Comparison of Employment-Related Business Mix Grand Island MSA vs. State of Nebraska

| NAICS Code                            | Grand Island MSA |              | State of Nebraska |              |
|---------------------------------------|------------------|--------------|-------------------|--------------|
|                                       | # of Businesses  | % of Total   | # of Businesses   | % of Total   |
| <b>Professional Office Businesses</b> |                  |              |                   |              |
| Banks & Lending Institutions          | 88               | 2.2%         | 1,619             | 2.0%         |
| Securities                            | 41               | 1.0%         | 879               | 1.1%         |
| Insurance                             | 103              | 2.6%         | 2,268             | 2.8%         |
| Real Estate                           | 126              | 3.2%         | 2,821             | 3.5%         |
| Legal Services                        | 41               | 1.0%         | 1,045             | 1.3%         |
| <b>Medical Office Businesses</b>      |                  |              |                   |              |
| Healthcare Services                   | 185              | 4.7%         | 4,520             | 5.6%         |
| <b>Industrial-Related Businesses</b>  |                  |              |                   |              |
| Manufacturing                         | 144              | 3.6%         | 2,483             | 3.1%         |
| Transportation                        | 196              | 4.9%         | 3,046             | 3.8%         |
| Communications                        | 39               | 1.0%         | 725               | 0.9%         |
| Utilities                             | 16               | 0.4%         | 471               | 0.6%         |
| Wholesale Trade                       | 168              | 4.2%         | 3,493             | 4.3%         |
| <b>Totals</b>                         | <b>1,147</b>     | <b>28.9%</b> | <b>23,370</b>     | <b>29.0%</b> |

Source: Esri Business Analyst.

The Grand Island MSA supports several key industries, including transload and logistics, distribution and warehousing, manufacturing, and agriculture and agribusiness.

Grand Island's central location within the United States and convenient highway and rail access provides opportunities for transload and logistics operations. Major hubs such as Chicago, Dallas, Denver, Minneapolis, and St. Louis can be reached by vehicle within one business day and by railroad within two to five days. Central Nebraska Transload, GIX Logistics, Grand Island Express, and Sunrise Express are examples of transloading and logistics companies operating in the Grand Island MSA.

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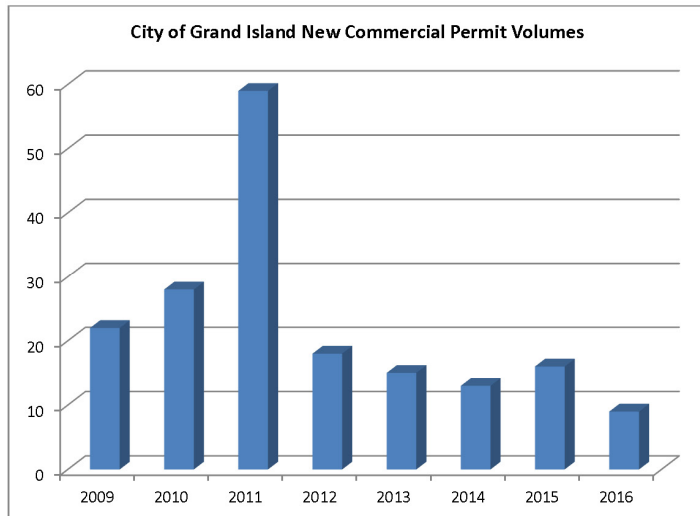
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For the same reasons that the Grand Island MSA supports transloading and logistics operations distribution and warehousing companies play a major role in the local economy. Eagle Distributing, Nebraskaland Distributors, TOBA Inc., the Thompson Company, FedEx, and Eakes Office Plus are examples of distribution centers in Grand Island.

Manufacturing represents a growing segment of the Grand Island MSA economy. Notable manufacturing companies operating in the Grand Island MSA include JBS, Hornady Manufacturing, Chief Industries, and McCain Foods.

The largest private-sector employers in Grand Island include JBS (3,200 employees), CHI Health St. Francis (1,300 employees), Hornady Manufacturing (751 employees), CNH Industrial America (722 employees), Walmart (662 employees), Chief Industries (650 employees), McCain Foods (550 employees), and Principal (484 employees).

To illustrate the level of recent employment-related construction activity annual trends in commercial building permit activity are depicted in the bar chart below. It must be noted that the commercial building permit activity also includes retail businesses. From 2009 through 2016 new commercial construction peaked in 2011 when 59 permits were issued. Since 2011 new commercial construction volumes have declined steadily reaching a low of just nine permits issued in 2016.



## **Industrial and Business Parks**

Several active and proposed industrial parks operate within the Grand Island MSA. Business parks featuring an integrated master plan featuring a mix of light industrial, flex space, office space, and common area amenities currently do not exist in the Grand Island MSA. The text to follow identifies active and proposed industrial parks in the Grand Island area.

### **Platte Valley Industrial Park**

Located at the northeast corner of U.S. Highway 281 and Wildwood Drive at the south end of Grand Island, the Platte Valley Industrial Park is owned by the Grand Island Area Economic Development Corporation. The industrial park is improved with roads and utilities with 16 businesses in operation, including Eagle Distributing, Nebraskaland Distributors, Nebraska Truck Center, Cleary Building Corporation and Midway Wholesale. Three lots totaling 18.24 acres remain available for sale and development within the Platte Valley Industrial Park.

### **Platte Valley Industrial Park East**

Also owned by the Grand Island Area Economic Development Corporation, the Platte Valley Industrial Park East is located immediately adjacent to the Platte Valley Industrial Park. City infrastructure such as water, sewer, electricity and a paved road are available to the 433-acre parcel, but the site has yet to be subdivided and improved with on-site streets and utilities. Rail lined serviced by Union Pacific Railroad are adjacent to the site allowing for rail expansion and utilization. The property has been declared blighted and substandard, allowing for the use of tax increment financing. Henricks has purchased a 20-acre parcel within the park and is planning a 60,000 square foot building.

### **Platte Valley Industrial Park Homestead**

Across the street from the Platte Valley Industrial Park East is the 158-acre Homestead property. City infrastructure is also available to the property which is currently under agricultural use.

### **Cornhusker Industrial Park**

The Grand Island Area Economic Development Corporation has ownership of this 260-acre parcel located outside of the Grand Island city limits approximately a 15 minute drive west of downtown. The property is the former site of the Cornhusker Army Ammunition Plant and is currently under agricultural use. The site is serviced by both the Burlington Northern Santa Fe and Union Pacific rail roads with a short line connecting the two.

### **Energy Park**

The Southern Power District owns 652 acres available for development at the former Cornhusker Ammunition Plant located on West Old Potash Highway two miles west of Grand Island. The property has been cleaned up by the U.S. Army Corps of Engineers. The Southern Power District's vision is to develop the property with companies that possess significant energy needs.

### **Airport Business and Technology Park**

The Hall County Airport Authority is owner of the Airport Business and Technology Park located adjacent to the Central Nebraska Regional Airport. On-site infrastructure is in place and rail service to the property is provided by Union Pacific. The park is currently home to over 20 businesses. Approximately 185 acres of land remains available for development within the Airport Business and Technology Park.

To conclude, six industrial parks are currently being actively marketed in the Grand Island area to prospective businesses. The Platte Valley Industrial Park and the Airport Business and Technology are the only properties that have been subdivided, improved and house businesses. Both are standard industrial parks with no comprehensive planning, mixed-use development, or common amenities. Approximately 200 acres remains available for future development within these two industrial parks. The four undeveloped parcels of industrial land in the Grand Island area collectively possess approximately 1,500 acres of raw land.

### **Forecast Space Demand**

Professional office, medical office, and industrial space demand projections for the Grand Island MSA through the year 2030 provide an understanding of future market conditions directly impacting the feasibility of new employment-related development supportable on the Veterans' Home property.

#### **Professional Office Space**

The demand for professional office space is closely correlated with expansion in office space using employment sectors. Future demand for professional office space was forecast utilizing an occupational employment-driven model. This model was designed using the variables of increased employment in categories of economic activity typically associated with demand for office space and average space requirements per employee. A share of regional demand is assigned to the submarket (and specific project) on the basis of location, competition, access, project scale, etc.

The U.S. Department of Labor defines office employment as jobs in the information, financial activities, and professional and business services industries. According to the *County Business Pattern* published by the U.S. Census Bureau, as of July 2015 employment in Hall County for the office using sectors of information; finance, insurance and real estate; legal; professional, scientific and technical services; management; and administrative and support services was reported at 3,988 jobs, or 13.1 percent of total employment. According to the *Business Summary Report* published by Esri Business Analyst, the office-based jobs currently account for 13.4 percent of the Grand Island MSA employment, or 6,653 jobs.

According to the *County Business Patterns* from 2002 through 2015 the Grand Island MSA added just 325 new office-related sector jobs. Hall County accounted for over 83 percent of the MSA office-related job growth over the 14 year timeframe. Based on these historic employment trends, forecast population growth and demographic characteristics, from 2017 through 2030 office-related job growth in the Grand Island MSA is projected to increase at an average annual rate of 0.5 to 1.0 percent, yielding approximately 340 to 700 new jobs.

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### **Office-Based Employment Trends Grand Island MSA; 2002 to 2015**

| Employment Sector        | Employment |       |          |
|--------------------------|------------|-------|----------|
|                          | 2002       | 2015  | Variance |
| Information              | 527        | 312   | -215     |
| Finance & Insurance      | 1,843      | 1,546 | -297     |
| Real Estate              | 185        | 346   | 161      |
| Professional Services    | 624        | 803   | 179      |
| Management               | 0          | 119   | 119      |
| Administrative & Support | 1,149      | 1,527 | 378      |
| Totals                   | 4,328      | 4,653 | 325      |

Source: County Business Patterns, U.S. Census Bureau.

Office space demand created by the future growth in office-related employment was forecast by applying standard job creation ratio outlined in the *Development Impact Assessment Handbook* published by the Urban Land Institute ("ULI") of 1.0 job per 250 square feet of office space. This job creation rates account for both owner-occupied and speculative office space. Recent office space planning trends has resulted in a decline in the average space per employee of approximately 200 square feet.

Based on a per capita space requirement of 200 square feet, from 2017 through 2030 office-related job growth in the Grand Island MSA is projected to support the demand for approximately 68,000 to 140,000 square feet of both owner-occupied and speculative office space. The table below depicts the professional office space demand projections for the Grand Island MSA through 2030.

### **Forecast Professional Office Space Demand Grand Island MSA; 2017 to 2030**

|                                   | Moderate<br>Scenario |        | Optimistic<br>Scenario |
|-----------------------------------|----------------------|--------|------------------------|
|                                   |                      |        |                        |
| Grand Island MSA                  |                      |        |                        |
| Office-Related Employment Growth  |                      | 340    | 700                    |
| Net Office Space Demand (Sq. Ft.) |                      | 68,000 | 140,000                |
|                                   |                      |        |                        |

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### Medical Office Space

Strong demand for medical services has created a boom in medical office buildings that carried beyond the peaking of the traditional commercial office market in 2007. Medical office construction has spilled over into fast-growing suburbs and has followed the outmigration of hospitals and the growth in outpatient facilities. Indeed, medical office buildings are somewhat tethered to hospital facilities providing convenience for physicians and patients alike. The demand for new medical office space is also being driven by advances in medical technology that require infrastructure not available in many existing office buildings.

Medical office space demand is a function of expansion in medical practices and associated needs, which is related to growth in population. While population growth trends are associated with economic trends, the fluctuations are less pronounced and demand for this market segment is considered to be less cyclical. The demand for medical office space is typically highly specific geographically, with healthcare services gravitating to locations at or near hospitals.

Demand for medical office space is forecast via a methodology that includes a determination of medical employment per capita for the trade area which is then multiplied by the average square footage required per medical employee to derive a total medical office square footage per capita coefficient. This local area coefficient is applied to current (future) estimates of area population to generate an estimate of current (future) medical space demand, excluding demand related to acute care hospitals and other more specialized surgical centers.

According to the *Business Summary Report* published by Esri Business Analyst, current healthcare employment in the Grand Island MSA totals 6,765 jobs, or 13.6 percent of total employment. Esri Business Analyst forecasts the Grand Island MSA's current resident population of 86,970 people to reach 90,400 by 2022. The *Development Impact Assessment Handbook* publishes a job creation rate of 1.0 job per 250 square feet of medical office space. These economic indicators translate to an average of 19.4 square feet of medical office space per every resident of the Grand Island MSA. For the purpose of this report, a per capita rate of 18 to 20 square feet was utilized.

The Grand Island MSA population is forecast to increase by 9,300 residents through 2030, generating the demand for an estimated 167,400 to 186,000 square feet of medical office space.

**Forecast Medical Office Space Demand  
Grand Island MSA; 2017 to 2030**

|                                       | Moderate<br>Scenario | Optimistic<br>Scenario |
|---------------------------------------|----------------------|------------------------|
| <b>Grand Island MSA</b>               |                      |                        |
| Forecast Population Growth            | 9,300                | 9,300                  |
| Medical Office Space Demand (Sq. Ft.) | 167,400              | 186,000                |
|                                       |                      |                        |

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### Industrial Space

The demand for industrial space is a function of employment, investment and technology. The U.S. Department of Labor defines industrial employment as jobs in the manufacturing, wholesale trade, and transportation and warehousing industries.

According to the *Business Summary Report* published by Esri Business Analyst, industrial-based jobs currently account for 19.4 percent of the Grand Island MSA employment, or 9,617 jobs.

The majority of the region's industrial-based employment is located in the City of Grand Island (Hall County). To illustrate, according to the *County Business Patterns 2015* published by the U.S. Census Bureau, during 2015 in Hall County the manufacturing, wholesale trade, and transportation and warehousing sectors accounted for one-third of total employment.

According to the *County Business Patterns* from 2002 through 2015 the Grand Island MSA County added 1,725 new industrial-based jobs. Hall County accounted for all the job growth, adding 1,932 industrial based jobs over the 14-year timeframe. Based on these historic employment trends, forecast population growth, and demographic characteristics, from 2017 through 2030 industrial-based job growth in the Grand Island MSA is projected to increase at an average annual rate of 1.1 percent to 1.3 percent, yielding approximately 1,970 to 2,360 new jobs.

**Industrial-Based Employment Trends  
Grand Island MSA; 2002 to 2015**

| Employment Sector            | Employment    |               |              |
|------------------------------|---------------|---------------|--------------|
|                              | 2002          | 2015          | Variance     |
| Manufacturing                | 6,887         | 7,816         | 929          |
| Transportation & Warehousing | 1,205         | 1,877         | 672          |
| Wholesale Trade              | 2,083         | 2,207         | 124          |
| <b>Totals</b>                | <b>10,175</b> | <b>11,900</b> | <b>1,725</b> |

Source: County Business Patterns, U.S. Census Bureau.

Space demand created by the future growth in industrial-related employment was forecast by applying standard job creation ratio of 1.0 job per 500 square feet of industrial park space. This job creation rates account for both owner-occupied and speculative industrial space.

Based on a per capita space requirement of 2,500 square feet, from 2017 through 2030 industrial-based job growth in the Grand Island MSA is projected to support the demand for approximately 985,000 to 1,180,000 square feet of both owner-occupied and speculative industrial space.

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**Industrial Space Demand Forecasts  
Grand Island MSA; 2017 to 2030**

|                                    | Moderate<br>Scenario | Optimistic<br>Scenario |
|------------------------------------|----------------------|------------------------|
| <b>Grand Island MSA</b>            |                      |                        |
| Industrial-Based Employment Growth | 1,970                | 2,360                  |
| Industrial Space Demand (Sq. Ft.)  | 985,000              | 1,180,000              |
|                                    |                      |                        |

### Site Evaluation

A feasible employment-related development site possesses the following characteristics: excellent location and access; appropriate parcel size and shape; availability to a large and diverse labor pool; proximity to customers; and compatibility with surrounding land uses. Suburban office development tends to gravitate to convenient freeway locations and/or mixed-use environments that provide the needed support services (i.e., restaurants, retail goods, lodging and entertainment) and prestigious business image. Industrial development also tends to concentrate along freeway corridors and rail lines. Medical office building development tends to concentrate adjacent to major hospitals. The Veterans' Home property has been evaluated for its potential to support employment-related development.

### Location and Access

The Veterans' Home property is located at the northern edge of Grand Island in the path of urban growth. Despite convenient access to U.S. Highway 281, the property's northern location places constraints for attracting manufacturing, distribution, and warehousing companies. The southern portion of Grand Island remains the area's dominant industrial location given the convenient access to Interstate 80 and rail service. The property location as a technology and office business location is suitable, particularly if a business park environment is created. The property's close proximity to the Veterans' Hospital is not expected to generate significant demand for on-site medical uses.

The U.S. Highway 281 retail corridor is located one-quarter mile to the west providing convenient access to shopping, entertainment, and personal and business services. Both for-sale and rental housing is available within the immediate neighborhood.

Vehicular access to the property is excellent with on-site access provided by the adjacent major arterial street with regional access provided via U.S. Highway 281 and Interstate 80. The Central Nebraska Regional Airport is also within convenient access providing both commercial and private air service.

### Site Characteristics

As a prospective employment-related development site the Veterans' Home property benefits from a large inventory of land, availability of infrastructure, presence of adjacent major arterial roads, and on-site recreational uses. The property's large inventory of land provides the opportunity to support mixed-use development within a master planned setting.

### Access to Labor

The Grand Island MSA is the largest population and business center in central Nebraska supporting a population of 86,970 and a workforce of over 30,000. The current employment composition favors manufacturing, distribution, and warehousing positions. The Grand Island MSA supports below average levels of professional and medical services employment. The local population is also on average less educated than the state and national norms. There is no 4-year accredited university in Grand Island.

### Proximity to Customers

Grand Island's central location within the United States and convenient highway and rail access provides opportunities for transload and logistics operations. Major hubs such as Chicago, Dallas, Denver, Minneapolis, and St. Louis can be reached by vehicle within one business day.

### Adjacent Land Uses

The Veterans' Home property is surrounded by a mix of land uses including attached and detached housing, medical, retail and recreational. The land uses that will have the greatest impact on the development potential for the property are actually located on-site. The Veterans' Athletic Complex provides the opportunity to construction additional sports and recreation facilities. The ability to expand the existing water feature will create the opportunity to provide for a desirable common amenity for more intense urban uses such as technology and professional office buildings. The potential re-use of some of the existing buildings on the Veterans' Home campus should be evaluated with potential uses including educational, medical and housing.

### Conclusions

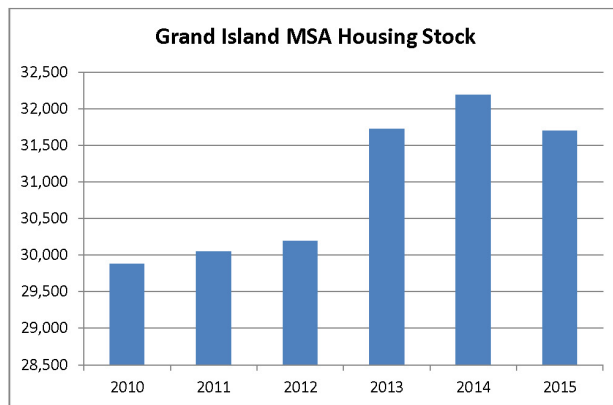
Future employment-related redevelopment opportunities for the Veterans' Home property include a master planned business park designed to support a mix of professional office, medical office, technology, commercial, and recreational uses. Such development would distinguish itself from active industrial parks in Grand Island by providing a more upscale urban environment capable of attracting higher value-added businesses. Benefits of the property for such employment-related development include sufficient land area to accommodate master planning, adequate access and infrastructure, and the ability of on-site land uses to enhance the attractiveness of the property to businesses.

## Residential Housing Market Analysis

This section of the report evaluates the Grand Island MSA's existing housing stock by identifying such characteristics as total inventory of dwelling units, occupancies, age and type of the existing housing inventory as well as recent trends in new home construction activity. The goal is to identify current and future opportunities to support new housing stock in Grand Island.

### Housing Stock Characteristics

The 2010 Census reported the Grand Island MSA housing stock at 30,198 dwelling units, with 92.6 percent of the housing stock occupied and 7.4 percent vacant. According to the *American Community Survey*, from the 2010 Census through 2015 the Grand Island MSA's housing stock increased to 31,703 dwelling units.



The table on the following page compares the age of the Grand Island MSA housing stock with that of the State of Nebraska as reported by the *2015 American Community Survey* published by the U.S. Census Bureau. The Grand Island MSA's housing stock is relatively old with nearly two-thirds of the existing inventory built prior to 1960. The oldest housing built prior to 1940 accounts for 20 percent of the MSA's total housing stock, or 6,340 dwelling units. Newer housing built since 2010 represents just 4.0 percent of the MSA's total inventory, or only 1,268 dwelling units.

The age of the Grand Island MSA's housing stock is relatively consistent with that of the State of Nebraska. While the Grand Island MSA possesses a slightly larger share of homes built since 2010, its stock of housing built prior to 1960 represents a larger share.

### Housing Stock by Year Built Grand Island MSA vs. Nebraska

| Year Structure Built       | Grand Island MSA | Nebraska       |
|----------------------------|------------------|----------------|
| <b>Total Housing Units</b> |                  | <b>744,159</b> |
| Built 2014 or Later        | 0.6%             | 0.5%           |
| Built 2010 to 2013         | 3.4%             | 2.9%           |
| Built 2000 to 2009         | 10.3%            | 12.2%          |
| Built 1980 to 1999         | 21.3%            | 22.1%          |
| Built 1960 to 1979         | 27.0%            | 27.4%          |
| Built 1940 to 1959         | 17.3%            | 14.9%          |
| Built 1939 or Earlier      | 20.0%            | 19.9%          |

Source: U.S. Census.

The table below identifies the Grand Island MSA's housing stock by unit type as reported by the *2015 American Community Survey*. The Grand Island MSA's housing stock is dominated by detached single family homes that account for 72.6 percent of the total inventory. This preference for detached housing is more common in outlying and rural areas.

### Grand Island MSA Occupied Housing Stock by Type – 2015

| Units in Structure                     | # of Units | % of Total    | Nebraska %    |
|----------------------------------------|------------|---------------|---------------|
| 1-Unit, Detached                       | 23,016     | 72.6%         | 73.6%         |
| 1-Unit, Attached                       | 1,553      | 4.9%          | 3.9%          |
| 2 Units                                | 761        | 2.4%          | 1.8%          |
| 3 or 4 Units                           | 1,427      | 4.5%          | 2.5%          |
| 5 to 9 Units                           | 1,300      | 4.1%          | 4.1%          |
| 10 or more                             | 1,934      | 6.1%          | 11.2%         |
| Mobile Home and other Types of Housing | 1,712      | 5.4%          | 2.9%          |
| <b>Total Housing Units</b>             |            | <b>100.0%</b> | <b>100.0%</b> |

Source: U.S. Census Bureau.

Another common characteristic of outlying and rural area's housing mix is a modest inventory of multi-family housing units. Grand Island MSA multi-family structures with 10 or more dwelling units account for just 6.1 percent of the total housing stock, compared to 11.2 percent for all of Nebraska. The Grand Island MSA's share of mobile homes and other housing types is nearly twice that of the statewide average.

As indicated by the table below, homeowners in the Grand Island MSA are more likely to occupy detached single family housing while renters generally occupy multi-family housing.

**Grand Island MSA Occupied Housing Stock by Type – 2015  
Owner-Occupied vs. Renter-Occupied Housing**

| Housing Type                  | MSA Total     | Owner-Occupied | Renter-Occupied |
|-------------------------------|---------------|----------------|-----------------|
| <b>Occupied Housing Units</b> | <b>31,703</b> | <b>20,507</b>  | <b>11,196</b>   |
| Units in Structure            |               |                |                 |
| 1-Unit, Detached              | 72.6%         | 92.9%          | 35.5%           |
| 1-Unit, Attached              | 4.9%          | 2.1%           | 10.1%           |
| 2 Units                       | 2.4%          | 0.7%           | 5.5%            |
| 3 to 4 Units                  | 4.5%          | 0.3%           | 12.1%           |
| 5 to 9 Units                  | 4.1%          | 0.0%           | 11.7%           |
| 10+ Units                     | 6.1%          | 0.2%           | 16.9%           |
| Mobile Home or Other          | 5.4%          | 3.8%           | 8.3%            |

Source: American Community Survey 2015.

For 2015, the U.S. Census Bureau estimated that 20,507 owner-occupied housing units in the Grand Island MSA were occupied. Detached single family homes accounted for 92.9 percent of all occupied owner-occupied housing units. Meanwhile, an estimated 11,196 rental housing units were occupied. Renters were much less likely to occupy detached single family homes accounting for 35.5 percent of all occupied rental units.

Properties with 10+ rental units were the most popular attached housing product for renters accounting for 16.9 percent of all renter-occupied units. Properties with 3 to 4 dwelling units account for 12.1 percent of all renter-occupied units. Meanwhile, structures with 5 to 9 rental units accounted for 11.7 percent of all renter-occupied units.

The table of the following page segments monthly housing costs in the Grand Island MSA for both homeowners and renters as provided by the American Community Survey 2015. The data illustrates a strong demand for affordable housing for both owner-occupied and rental housing. For owner-occupied housing units nearly 45 percent of the occupied inventory possesses a cost of just \$300 to \$799 per month. Just 6.3 percent of owner-occupied housing has a cost of \$2,000 or more per month. The average monthly cost for owner-occupied housing in the Grand Island MSA is just \$788.

Rental housing in the Grand Island MSA supports a much higher percentage of affordable housing. Over two-thirds of all rental housing possesses monthly housing costs of under \$800. The median renter-occupied housing cost is just \$682.

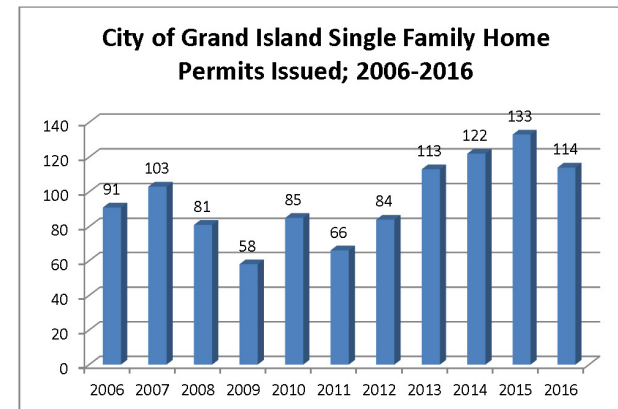
**Grand Island MSA Monthly Housing Costs – 2015  
Owner-Occupied vs. Renter-Occupied Housing**

| Housing Type                  | MSA Total     | Owner-Occupied | Renter-Occupied |
|-------------------------------|---------------|----------------|-----------------|
| <b>Occupied Housing Units</b> | <b>31,703</b> | <b>20,507</b>  | <b>11,196</b>   |
| Less than \$300               | 5.9%          | 6.5%           | 4.8%            |
| \$300 to \$499                | 17.7%         | 21.4%          | 11.1%           |
| \$500 to \$799                | 32.0%         | 23.2%          | 48.2%           |
| \$800 to \$999                | 14.5%         | 11.1%          | 20.6%           |
| \$1,000 to \$1,499            | 17.0%         | 22.1%          | 7.5%            |
| \$1,500 to \$1,999            | 6.1%          | 9.3%           | 0.3%            |
| \$2,000 to \$2,499            | 4.3%          | 5.1%           | 2.8%            |
| \$2,500 to \$2,999            | 0.5%          | 0.6%           | 0.4%            |
| \$3,000 or more               | 0.4%          | 0.6%           | 0.0%            |

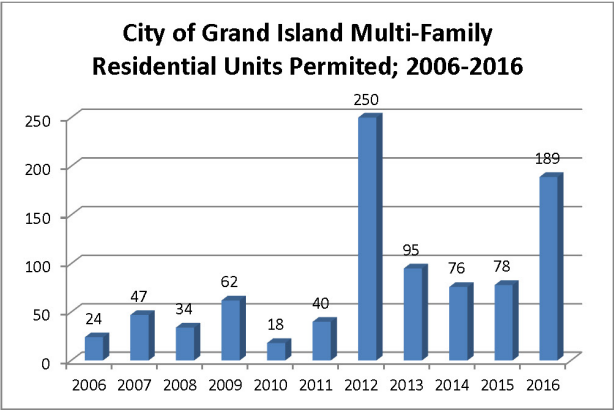
Source: American Community Survey 2015.

The Grand Island MSA's current demographics and mix of housing suggests that additional emphasis must be placed on affordable multi-family rental and for-sale housing that is needed to foster a more diverse housing market that meets the needs of a wider range of household types.

Since 2006, the City of Grand Island has supported an active new home construction market. Following a slight downturn in single family home construction from 2008 through 2011, by 2012 the new housing market was on the rebound peaking in 2015 with 133 homes permitted for construction. During 2016 new single family home construction declined 14.3 percent to a total of 114 dwelling units permitted. During the first half of 2017 a total of 45 single family homes were permitted for construction, down 23.7 percent from the first half of 2016.



From 2012 through 2016 the City of Grand Island experienced a boom in the construction of multi-family housing with a total of 688 dwelling units permitted for construction. Through the first half of 2017 new construction activity remained strong with 74 multi-family units being issued building permits.



Three large-scale apartment properties are currently under construction within the City of Grand Island.

The Lund Company is developing The Sterling Apartments located at 3721 West Capital Avenue just west of U.S. Highway 281 at the north end of Grand Island. The 3-story residential buildings include studio, 1-, 2- and 3-bedroom apartment models renting for \$690 to \$1,310 per month. Community amenities include garages, elevators, clubhouse, business center, fitness center, and swimming pool. Some of the residential buildings are completed and occupied.

Talon Apartment are under construction at the northeast corner of Locust Street and U.S. Highway 34 in the southern edge of Grand Island. Two, 3-story building are completed with 1- and 2-bedroom units renting for \$745 to \$845 per month. Buildings on the north end of the property now under construction are renting for \$745 to \$995 per month. The property includes detached garages.

Hoppe Homes is under construction on East Park on Stuhr Apartments located on the west side of Stuhr Road north of Bismark Road on the east side of Grand Island. Seven, 2-story residential buildings are under construction totaling 88 apartment units.

**Forecast Housing Demand**

Residential housing demand estimates for the Grand Island MSA through the year 2030 were forecast based on anticipated demographic and economic trends for the community. Key input to the model includes historical patterns in annual residential building permit activity and projected population and household growth, average household formation rates, households by income levels, and population by age. Demographic characteristics for the Grand Island MSA through 2022 were provided by Esri Business Analyst, a leading provider of global demographic and economic data.

According to the 2010 Census, the Grand Island MSA maintained 34,166 residential housing units, operating at an overall occupancy rate of 92.3 percent. The occupied housing units included 21,420 owner-occupied units and 10,115 renter-occupied units. A total of 2,631 vacant housing units were reported.

By 2017, the Grand Island MSA’s housing stock was estimated at 36,073 dwelling units, an increase of 1,907 housing units over the 2010 Census. The share of renter-occupied housing units increased to 30.9 percent, representing an increase of 1,036 occupied housing units. The share of owner-occupied housing units declined to 61.2 percent with 655 dwelling units absorbed since the 2010 Census.

Esri Business Analyst estimates that from 2017 through 2022 the Grand Island MSA will support 1,215 additional occupied housing units. Through 2022, the renter-occupied housing units stock will continue to capture an increasing share of the housing market. By 2022, renter-occupied housing is forecast to account for 31.0 percent of all housing units with owner-occupied housing accounting for 61.1 percent. Therefore, by 2022 the mix of housing demand is estimated at 22,858 owner-occupied units and 11,583 rental units.

**Forecast Housing Demand by Product Type  
Grand Island MSA; 2017-2022**

|                        | Census 2010 |            | 2017 Estimate |            | 2022 Forecast |            |
|------------------------|-------------|------------|---------------|------------|---------------|------------|
|                        | # of Units  | % of Total | # of Units    | % of Total | # of Units    | % of Total |
| Total Housing Units    | 34,166      | 100.0%     | 36,073        | 100.0%     | 37,398        | 100.0%     |
| Occupied Housing Units | 31,535      | 92.3%      | 33,226        | 92.1%      | 34,441        | 92.1%      |
| Owner-Occupied         | 21,420      | 62.7%      | 22,075        | 62.1%      | 22,858        | 61.1%      |
| Renter-Occupied        | 10,115      | 29.6%      | 11,151        | 30.9%      | 11,583        | 31.0%      |
| Vacant Housing Units   | 2,631       | 7.7%       | 2,847         | 7.9%       | 2,957         | 7.9%       |

Source: U.S. Census Bureau and Esri .

From 2017 through 2030 the Grand Island MSA population is forecast to increase by 9,303 residents, equating to the demand for 3,620 new occupied housing units. Given the region’s household income levels and existing housing stock, the housing demand is estimated to be segmented 65 percent owner-occupied and 35 percent renter-occupied.

## **Site Evaluation**

The Veterans' Home property was evaluated for the ability to facilitate development of residential housing based on the following site criteria: physical attributes of the site; visibility and exposure; access; and proximity to housing demand generators and services.

### **Physical Attributes**

A potential large-scale single family subdivision or apartment site should be fully serviced utilities available. A prospective single family subdivision site should possess the size to accommodate a minimum of 50 housing units with the presence of a natural tree cover or water features desirable in creating value. For a prospective apartment site a rectangular shape with the capacity to facilitate a minimum of 100 dwelling units is desirable to promote efficient and financially viable land planning.

The Veterans' Home property offers the necessary infrastructure, parcel size, and dimensions to facilitate construction of either a large-scale single family subdivision or apartment community. The ability to expand the existing water feature and create an open space network would create a unique setting for residential development.

### **Visibility and Exposure**

Potential large-scale single family subdivision and apartment sites should possess visibility via a major arterial so that an adequate marketing window can be provided. High traffic counts past the site also improve the site's market exposure.

The Veterans' Home property is surrounded by four major arterial streets and bisected by a highway, providing the necessary visibility and exposure to accommodate construction of a large-scale single family subdivision and apartment community.

### **Accessibility**

Regional, local and on-site vehicular access is important when assessing a prospective large-scale single family home subdivision or apartment site.

The Veterans' Home property benefits from excellent regional, neighborhood and on-site access via a transportation network that features a mix of freeways, highways and major arterial streets. Direct on-site access is provided via four adjacent major arterial streets and Old Highway 2.

### **Proximity to Housing Demand Generators**

Close proximity to such housing demand generators as employment centers, colleges and urban cores is critical when evaluating a potential apartment site. Grand Island supports a large employment base that in turn attracts a resident population and demand for for-sale and rental housing.

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## **Availability of Community Services**

A prospective residential development site should afford convenient access to such community services as shopping, dining, entertainment, recreation and schools.

Shopping, dining, entertainment, recreation and schools are conveniently located in close proximity to the Veterans' Home property. The property's close proximity to the U.S. Highway 281 corridor provides convenient vehicular access to restaurants, banking, grocery shopping, and a wide selection of retail goods and services.

## **Conclusions**

The Veterans' Home property possesses the location and site characteristics to facilitate construction of a large-scale single family subdivision and/or apartment community, including the necessary parcel size, infrastructure, access, visibility, and proximity to shopping, dining, entertainment, recreation, and employment. The demographic characteristics within the Grand Island MSA are also representative of the primary target market for both for-sale and rental housing.

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## STUDY RECOMMENDATIONS

The primary objective of the *Market Feasibility Study* was to evaluate future commercial, employment, residential, and recreational redevelopment opportunities for the 640-acre Veterans' Home property located at the northwest corner of Capital and Broadwell Avenues in Grand Island, Nebraska. Based on the study findings potential redevelopment opportunities for the Veterans' Home property were identified. Study recommendations include the following:

- Identify appropriate mix of land uses that could take advantage of site's location, physical characteristics, and existing land uses; and
- Quantify reasonably achievable absorption rates for new development given current directly competitive market trends.

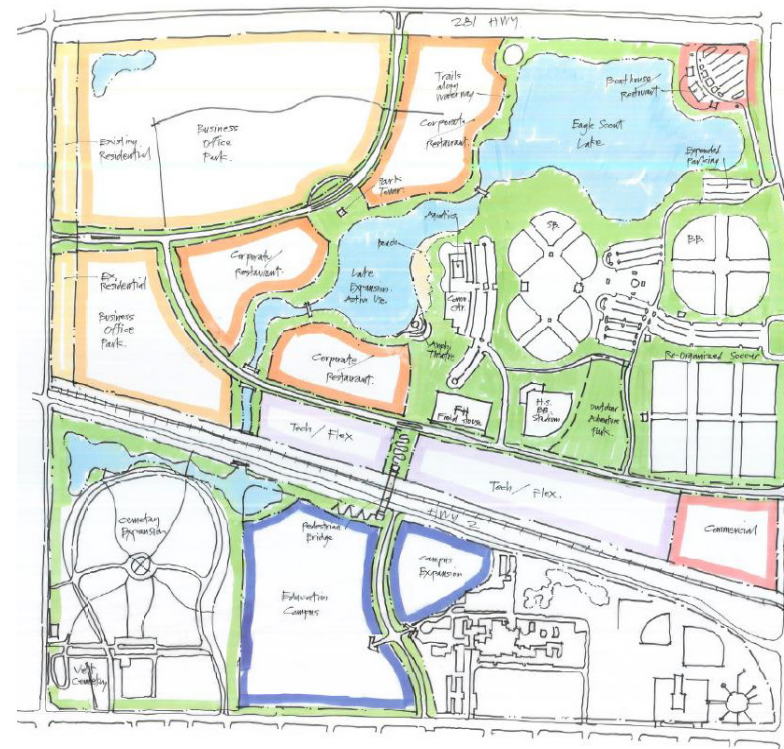
### Recommended Land Use Mix

The Veterans' Home property's large inventory of land, location at the edge of urban growth, utility infrastructure in place, and existing buildings and recreational facilities create a unique opportunity to promote comprehensive planning and mixed-use development. The priority of the master plan should be to foster economic development through attracting more value added enterprises and jobs. The conceptual plan outlined on the following page provides a context from which to discuss the land use recommendations for the Veterans' Home property.

The Veterans' Home property offers the locational and site characteristics to accommodate mixed-use development. Based on the findings of the *Market Feasibility Study* prospective land uses include an athletic complex, business park campus, educational campus, limited retail, and recreation/open space.

Create a major sports and recreation complex capable of catering to local and regional soccer, baseball and softball teams, leagues and tournaments, serving as an economic engine. The Veterans' Athletic Complex located at the northeast quadrant of the property features baseball and soccer fields. The park's master plan calls for expansion of the athletic and support facilities. The expansion will enable the Veterans Athletic Complex to host local and regional baseball and softball tournaments, thus servicing an expanded geographic trade area and promoting economic development. As part of the expansion plans the existing lake should be enlarged and a trail network incorporated. These improvements will both enhance Grand Island's quality of life, but create a unique setting for establishing employment-related uses on the property.

Excellent opportunity to create a unique business park campus environment that elevates what currently exists in the market. The most suitable location for a business park campus is at the northwest quadrant of the property, providing sufficient parcel size, adequate visibility, and convenient access to U.S. Highway 281. Expansion of the existing lake and addition of a trail network into the business park campus site will create a unique setting for employment-based development currently not available in the Grand Island MSA. Prospective tenants would include professional office, medical office, light industrial, and limited retail businesses.



A possible goal of the Veterans' Home master plan is to create an opportunity to link on-site educational training with employers and jobs. The benefits would include improving the workforce, retaining residents, and attracting new businesses. A common disadvantage discussed by stakeholders was the absence of a 4-year university in Grand Island. Attracting a 4-year university campus onto the property may not be viable, but a small annex campus specializing on trades and next generation professions could be. The Career Pathways Institute trains high school students in a variety of trades and is an excellent example of the type of educational facility that could be expanded on at the property. An appropriate location for an educational campus would be along the north side of Capital Avenue immediately east of the Veterans' Cemetery. Adaptive re-use of some of the existing buildings should also be evaluated.

The *Market Feasibility Study* determined that the Veterans' Home property is not an appropriate location for future anchored shopping center development. While the property offers the necessary size, visibility, accessibility, exposure, and trade area demographics, site characteristics that hamper the property as a viable anchored shopping center site include the

absence of a commercial corridor location and the lack of section-line corner development sites. Viable retail formats associated with the Veterans’ Athletic Complex, lake and open space network, and business park campus may include food and beverage establishments and businesses services housed in small freestanding retail buildings or incorporated into multi-tenant office and commercial buildings.

The *Community Housing Study with Strategies for Affordable Housing 2019* identified the Veterans’ Home property as a potential housing development site. While the *Market Feasibility Study* determined that the Veterans’ Home property offers all the necessary locational and site characteristics to support residential development, this land use does not present the property’s highest-and-best use. As an option as well as to allow for a flexible master plan, development parcels could be designed within the business park component that could be suitable for detached or attached housing should the long-term market demand dictate such uses.

**Projected Absorption**

A long-term development time horizon for the Veterans’ Home property is anticipated given the large inventory of land. By providing a unique mixed-use setting the Veterans’ Home property could garner above average market shares of office, medical, and light industrial space absorption. Through 2030, the Veterans’ Home property is forecast to absorb an estimated 122,000 to 195,000 square feet of commercial and light industrial space.

**Forecast Commercial Space Absorption  
Veterans’ Home Property; 2017-2030**

|                     | Moderate<br>Scenario | Optimistic<br>Scenario |
|---------------------|----------------------|------------------------|
| Professional Office | 13,600               | 35,000                 |
| Medical Office      | 33,500               | 46,500                 |
| Light Industrial    | 70,000               | 103,250                |
| Retail              | 5,000                | 10,000                 |
| Totals              | 122,100              | 194,750                |

Near-term redevelopment opportunities include adaptive re-use of selective buildings on the Veteran’s Home campus, continued expansion of the Veterans’ Athletic Complex, and construction of an expanded lake system, open space, and trail network.