

# Polk County Comprehensive Plan

Economic Development Task Force

“Kick off” Meeting

February 2, 2005



Strategic Development Planning

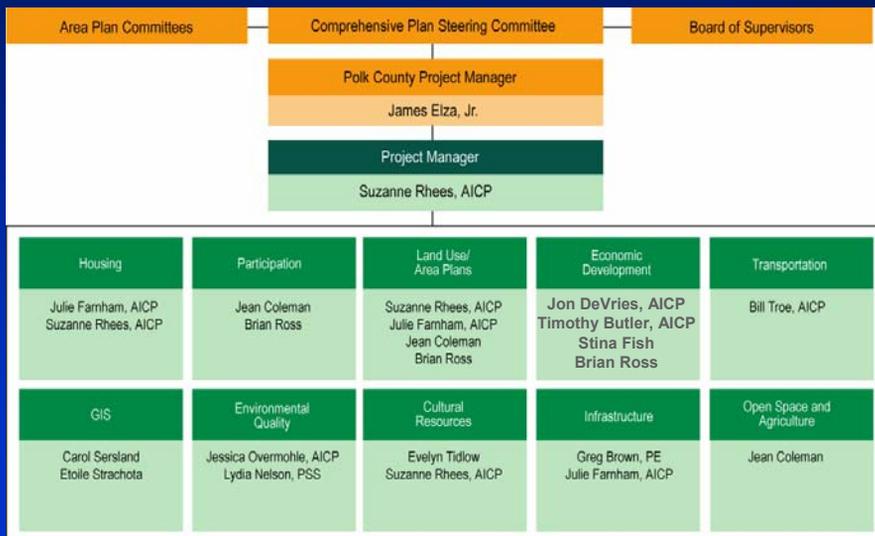
## Agenda

- Introduction of Task Force
- Mission of Economic Development Task Force
- Introduction of URS Team
- Review of Comprehensive Plan Process
- “Where is Polk County in the Midwest Economy and Where is it Going?”
- Discussion
  
- Collection of Handout Material

## Introduction of Task Force

- AIB College of Business
- Accu-Mold Corporation
- Neighborhood Development Corporation
- Keystone
- ITA
- Eastern Polk Regional Development
- Warren County Economic Community Federal Bank
- ABS Virtual
- R&R
- Ladco
- Gilotti
- Commercial Federal Bank
- Koehler
- MidAmerican
- Pioneer
- Albaugh, Inc
- BDF
- Coldwell
- Ankeny Industrial
- Charter Bank
- Hubbell
- Dallas County Economic Development
- Greater Des Moines Partnership
- Des Moines Economic Development

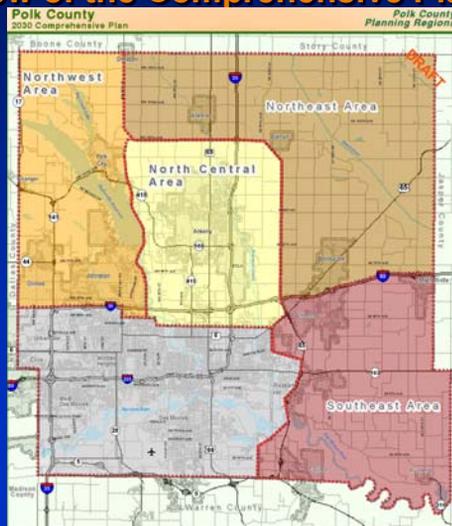
## Introduction of the Team



**Review of the Comprehensive Plan Process**

| URS   | Purposes of the Plan  |
|---|---|
|  | <ul style="list-style-type: none"> <li>• Long-term strategy</li> <li>• Shorter-term decisions</li> <li>• Development reviews</li> <li>• Basis for zoning</li> <li>• Guide to capital budget</li> <li>• Intergovernmental coordination</li> <li>• Private sector communication and leadership</li> </ul> |

**Review of the Comprehensive Plan Process**



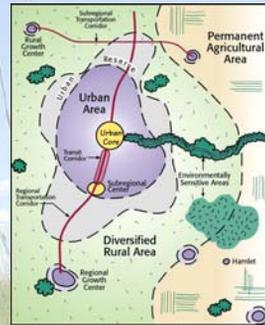
**Review of the Comprehensive Plan Process**

**URS**

**Purposes of the Plan**



- Link Land Use, Transportation, Utilities
- Focus on Implementation, Usability



**Review of the Comprehensive Plan Process**

**URS**

**Matching city and county land uses**



- City expansion plans, annexation agreements
- Regional highway plans (i.e., Northeast Beltway)
- Utility extensions
- Understanding community character and form of development



## Review of the Comprehensive Plan Process

**URS** **Primary Participation Methods**

- Steering Committee
- Area Plan Committees
- Housing Task Force
- Economic Development Task Force
- Open Houses
- Resources for staff presentations



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## Comprehensive Plan Base Information – Natural Resources



Land Base - Geology



Geology –  
Alluvial Deposits

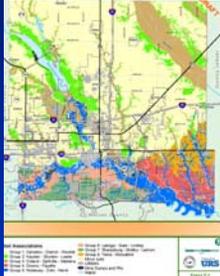


Abandoned coal mines –  
Known Locations

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# Comprehensive Plan Base Information – Natural Resources



Soil Associations



Steep slopes and Erodible Soils



Known and Potential Contamination Sites

# Comprehensive Plan Base Information – Socio Economic Data

- Population Density by Census Tract

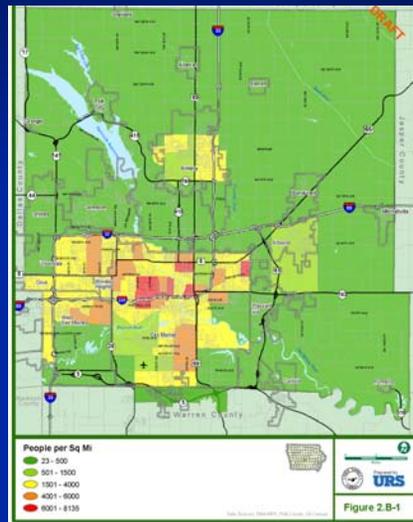
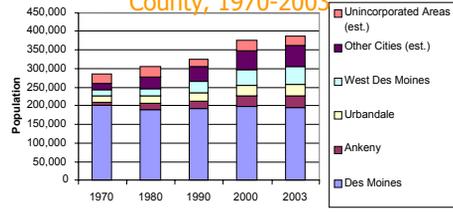


Figure 2.B-1

**Comprehensive Plan Base Information – Socio Economic Data**

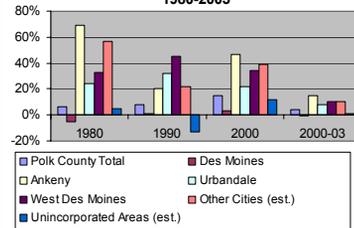
**Comparative Population Change in Polk County, 1970-2003**



**Percentage Population Change, 1980-2003**

| Population Area             | Ten years ending |      |      |         |
|-----------------------------|------------------|------|------|---------|
|                             | 1980             | 1990 | 2000 | 2000-03 |
| Polk County Total           | 6%               | 8%   | 15%  | 4%      |
| Des Moines                  | -5%              | 1%   | 3%   | -1%     |
| Ankeny                      | 69%              | 20%  | 47%  | 15%     |
| Urbandale                   | 24%              | 32%  | 22%  | 8%      |
| West Des Moines             | 33%              | 45%  | 34%  | 10%     |
| Other Cities (est.)         | 57%              | 22%  | 39%  | 10%     |
| Unincorporated Areas (est.) | 5%               | -13% | 12%  | 1%      |

**Percentage Population Change, 1980-2003**



**Comprehensive Plan Base Information – Socio Economic Data**

- Both County and cities grew faster than 1990 plan had predicted
- Unincorporated Polk County stayed fairly constant in population as its land base shrank

**Actual Population**

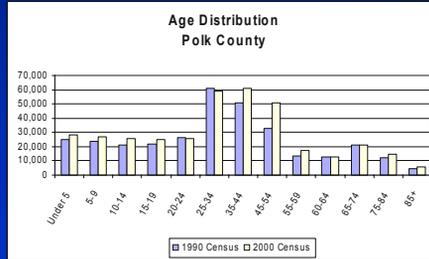
| Population Area          | 2000 Forecasts in 1990 Plan |                |                | Actual 2000 Population |
|--------------------------|-----------------------------|----------------|----------------|------------------------|
|                          | Baseline                    | Spill-over     | Target Policy  |                        |
| Des Moines               | 174,656                     | 174,656        | 183,675        | 198,682                |
| Suburban Municipalities  | 122,657                     | 112,872        | 108,348        | 144,379                |
| Exurban Municipalities*  | 3,537                       | 3,537          | 3,537          | 5,714                  |
| Unincorporated Areas     | 26,050                      | 26,050         | 31,340         | 25,826                 |
| <b>Polk County Total</b> | <b>326,900</b>              | <b>317,115</b> | <b>326,900</b> | <b>374,601</b>         |

\* Exurban municipalities in 2000: Alleman, Carlisle, Elkhart, Mitchellville, Polk City, Runnells, Sheldahl

Source: 1990 Comprehensive Plan, U.S. Census

**Comprehensive Plan Base Information –  
Socio Economic Data**

- County median age declined (counter to national trends) in 1990s from 38.2 to 34.4



- Largest age cohort is 35-44

**Comprehensive Plan Base Information –  
Socio Economic Data**

- Increasing racial and ethnic diversity (black, Asian, Latino)
- Overall increase in total households
- Declining household size
- More non-family households
- More senior heads of household; female heads of household

## Comprehensive Plan Base Information – Housing Data

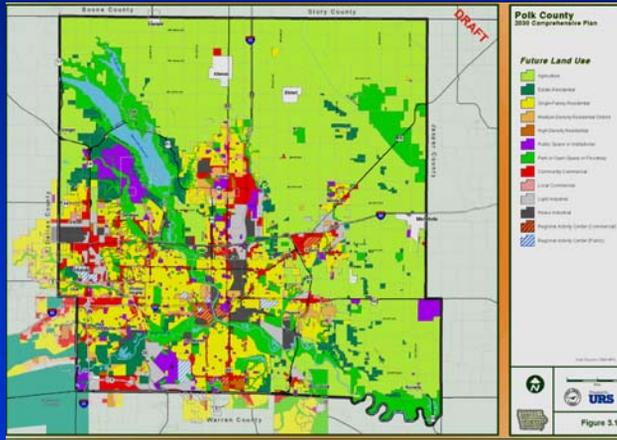
- 166,010 housing units (2003)
  - 6% increase since 2000
  - 22% since 1990
  - Grimes and Johnston saw largest increases
- 90% within municipalities (2000)
- Tenure
  - 67% owner-occupied, 27% rental, 6% vacant
- Housing values increased over 50% in 1990s in all municipalities
  - Highest values in Johnston, Clive, West Des Moines
  - Median value increased from \$73,200 in 1990 to \$103,100 in 2000 (40.8%)
- Rental costs increased 31%

## Comprehensive Plan Base Information – Housing Data

- Distribution of affordable housing
- Continued market demand for larger, more expensive housing; related impacts on housing affordability.
- Median household income for nonfamily households not keeping pace with housing costs
- 10.9% owner-occupied households are “cost-burdened,” 9.6% renter households
- County involvement primarily through Housing Trust Fund

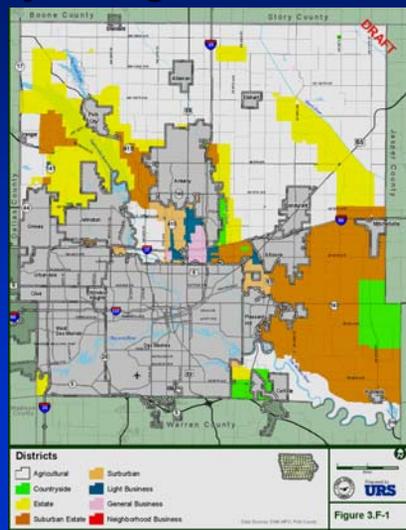


# Comprehensive Plan Base Information – Land Use Data



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# Comprehensive Plan Base Information – County Zoning



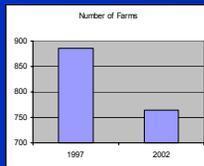
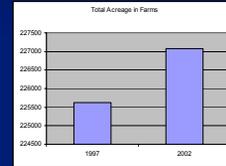
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## Comprehensive Plan Base Information – Agriculture



**Best Farmland Soils (CSR)**

- Northern 2/3 of County
- 63% of County lies outside municipal boundaries
- Approximately 62% total County area in farms
- Number of farms and farmers has declined
- Acreage in farms, size of farms have increased
- Slight rise in farm income



## Comprehensive Plan Base Information – Community Resources



**Community Facilities**



**Regional Facilities**



**Parks and Open Space**

## Comprehensive Plan Base Information – Transportation

- Multimodal:
  - Roadways
  - Transit
  - Non-motorized
- What is Included in the Transportation Element:
  - Roadway Improvements Major Routes/ Important Secondary Outside Municipalities
  - Local/Regional Transit System Changes/ Improvements Outside Municipalities
  - Major Bicycle/Pedestrian System Elements
  - Airports – From Master Plan
  - Freight Movement

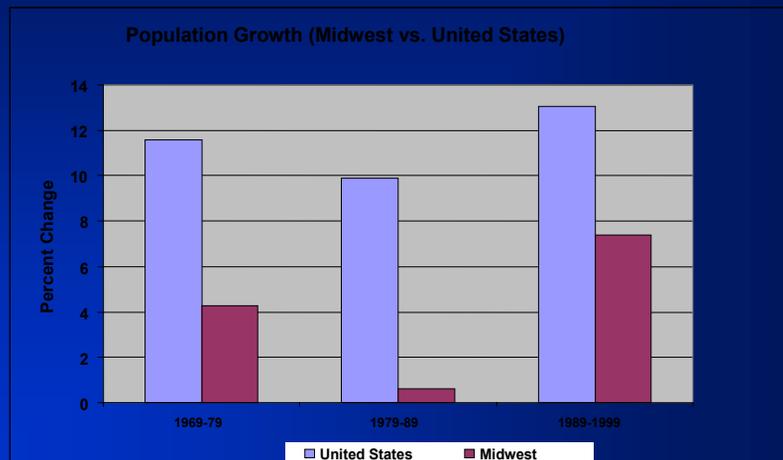
## Comprehensive Plan Base Information – Transportation

- What is NOT Included in the Transportation Element:
  - Locations inside municipalities
  - Nuisance Issues (speeding, cut through traffic, etc.
  - Local Street Projects
  - Local Bus System Routing Recommendations
  - Local Bicycle/Pedestrian Projects

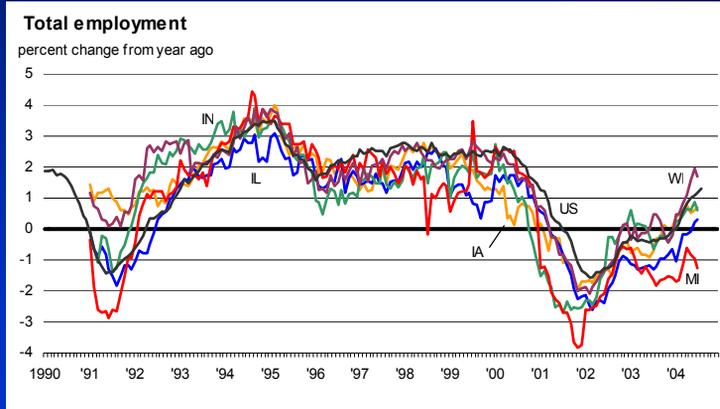
## Economic Base Analysis

- “Where is Polk County in the Iowa and Midwestern Economy and Where is it Going?”
  - Reviewed existing market conditions
  - Interviewed planning and business professionals
  - Profiled Midwest growth trends

### Growth returned to the Midwest during the 1990s



## Michigan lags, Wisconsin leads

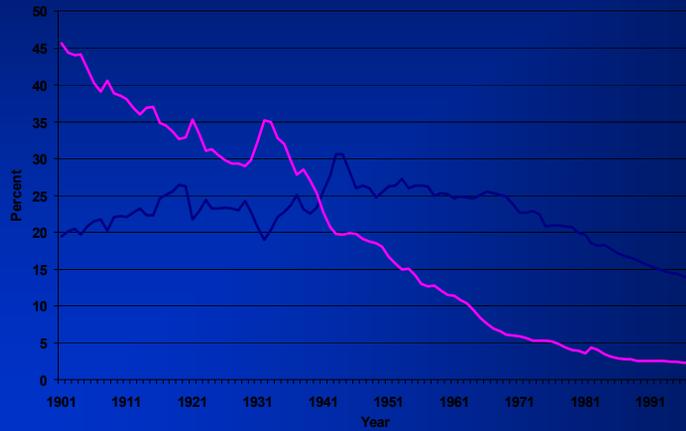


## Historic perspective

- Region became high-income during late 19th and early 20th century through agriculture, resources, manufacturing & urbanization

**Agriculture and manufacturing--MW mainstays--will continue to shrink**

Industry Employment as percent of Total Employment: 1900 - 1997



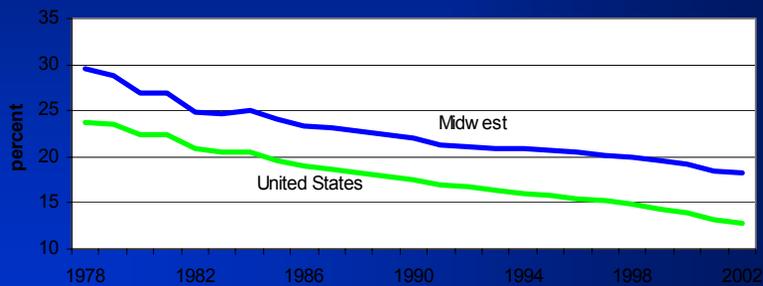
Sources: Historical Statistics of US, BLS, USDA

— Manufacturing/Total    — Agricultural/Total

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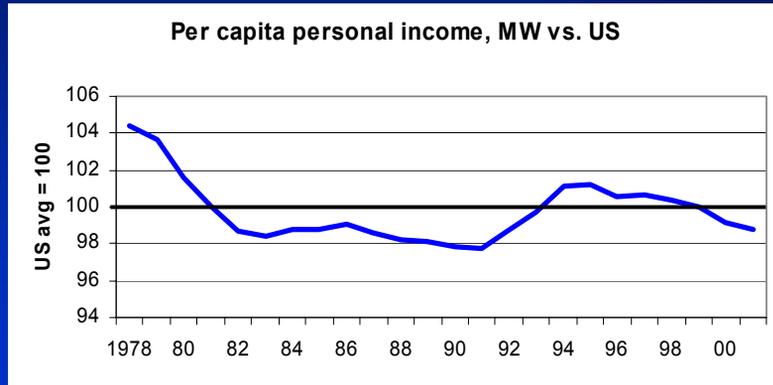
**Region of manufacturing--both then and now**

Manufacturing share of total employment

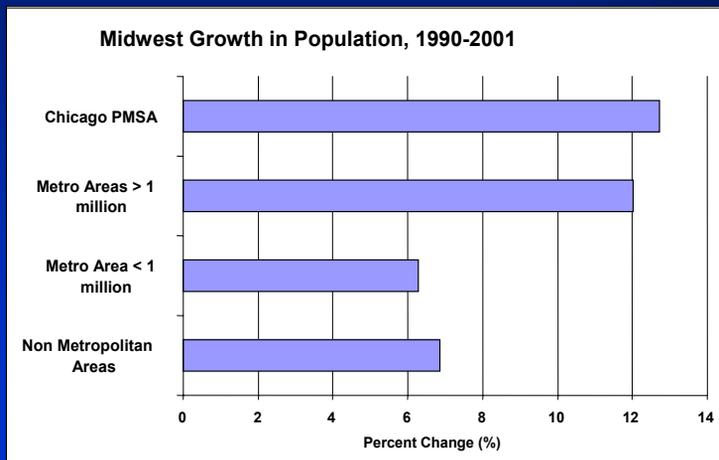


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**Per capita income vs. U.S.**

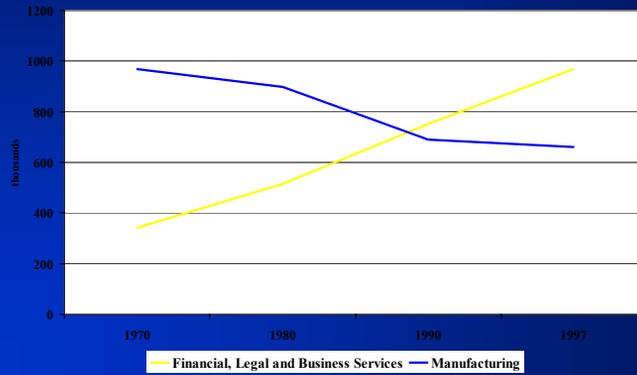


**Large cities are performing best...**



Some urban areas (i.e Chicago) have morphed to services....can others do so?

Chicago MSA Employment by sector, 1970-1997



Source: U.S. Department of Commerce, *County Business Patterns*, author's calculations

**Educational Attainment 2000**

| Educational Attainment 2000 |       |           |              |         |             |
|-----------------------------|-------|-----------|--------------|---------|-------------|
|                             | <H.S. | H.S. Grad | Some College | College | Adv. Degree |
| U.S.                        | 19.6  | 28.6      | 27.3         | 15.5    | 8.9         |
| Illinois                    | 18.6  | 27.7      | 27.7         | 16.5    | 9.5         |
| Chicago PMSA                | 17.0  | 26.0      | 26.0         | 19.0    | 11.0        |
| Indiana                     | 17.9  | 37.2      | 25.5         | 12.2    | 7.2         |
| Iowa                        | 13.9  | 36.1      | 28.8         | 14.7    | 6.5         |
| Michigan                    | 16.6  | 31.3      | 30.3         | 13.7    | 8.1         |
| Wisconsin                   | 15.0  | 34.6      | 28.1         | 15.3    | 7.2         |

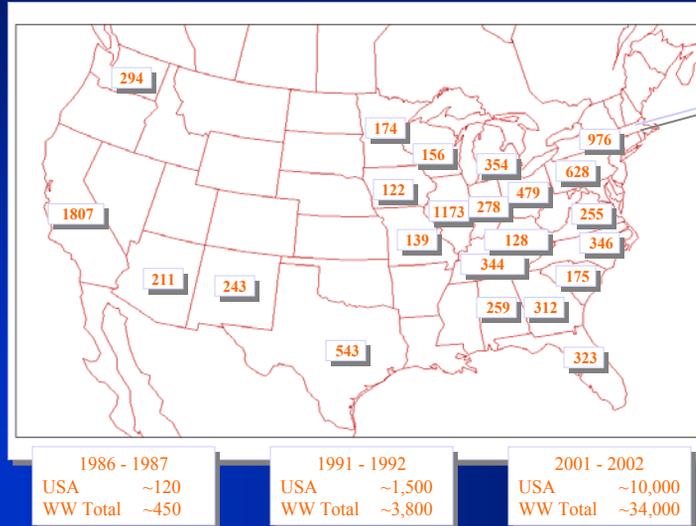
## Two Pillars of Biotech Development



## Midwest commercial biotechnology is weak...despite strong research activity

| Biotech Centers         | NIH funds (\$M) | bio Ph.Ds | bio patents |
|-------------------------|-----------------|-----------|-------------|
| Boston                  | 1,433           | 355       | 3,007       |
| S.F. Bay area           | 704             | 215       | 3,991       |
| San Diego               | 681             | 82        | 1,632       |
| Raleigh-Durham          | 469             | 166       | 796         |
| Seattle                 | 504             | 68        | 770         |
| New York                | 1,383           | 519       | 6,806       |
| Philadelphia            | 596             | 139       | 3,214       |
| Los Angeles             | 594             | 218       | 1,399       |
| Wash.-Balt.             | 952             | 241       | 2,162       |
| <b>Research Centers</b> |                 |           |             |
| Chicago                 | 417             | 177       | 1,444       |
| Detroit                 | 349             | 105       | 655         |
| Houston                 | 420             | 135       | 634         |
| St. Louis               | 324             | 73        | 780         |

The Midwest produces more nanotechnology papers than any other region--Can it produce the commercialization?



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## Economic Base Analysis

- Preliminary SWOT
  - Strengths – Employment Base, Transportation Linkages, Available Properties
  - Weaknesses – Attraction of Young Professionals, Changes in Financial Sector
  - Opportunities – Reinvestment in Downtown Des Moines and in Brownfields
  - Threats – Unbalanced Suburban Growth, Loss of New Technology growth to other centers

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## Economic Base Analysis

- Locational Advantage

| INDUSTRY                                | Polk County Employment     | Percentage of State    |
|---|----------------------------|------------------------|
|   | State of Iowa Employment   | Employment in Industry |
| Construction                            | 13,010 / 66,575            | 20%                    |
| Wholesale trade                         | 14,987 / 65,349            | 23%                    |
| Information                             | 8,835 / 34,182             | 26%                    |
| Finance and insurance                   | 39,669 / 80,594            | 49%                    |
| Real estate and rental and leasing      | 4,186 / 14,950             | 28%                    |
| Professional and technical services     | 10,846 / 37,833            | 29%                    |
| Management of companies and enterprises | 3,574 / 8,597              | 42%                    |
| Administrative and waste services       | 14,679 / 60,785            | 24%                    |
| Public administration                   | 14,184 / 71,635            | 20%                    |
| <b>TOTAL EMPLOYMENT</b>                 | <b>242,835 / 1,403,989</b> | <b>17%</b>             |

## Economic Base Analysis

- Migration of residents from other Counties  
2000 - 2003

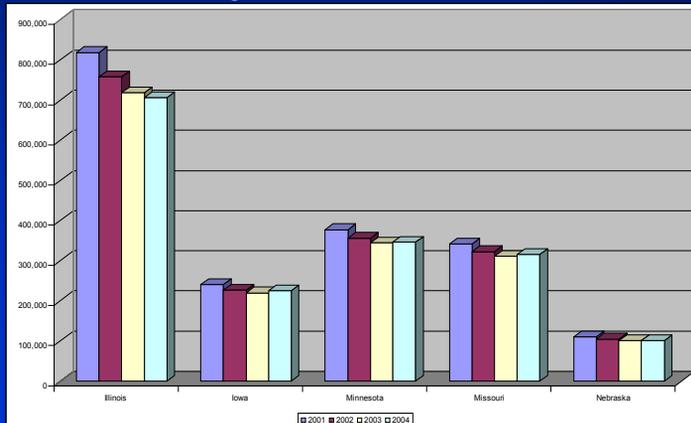
|                  | In Migration  | Out Migration | Net Migration |
|------------------|---------------|---------------|---------------|
| Iowa             | 25,071        | 23,219        | 1,852         |
| Other            | 11,046        | 10,830        | 216           |
| Foreign          | 422           | 248           | 174           |
| Northeast        | 1,236         | 1,333         | -97           |
| Midwest          | 10,626        | 11,110        | -484          |
| West             | 4,771         | 5,498         | -727          |
| South            | 4,914         | 6,758         | -1,844        |
| <b>Migration</b> | <b>58,086</b> | <b>58,996</b> | <b>-910</b>   |

## Employment Base – State of Iowa

- Iowa vs. Peer States
  - Illinois, Minnesota, Nebraska and Missouri
- Key Employment Categories
  - Manufacturing
  - Transportation and warehousing
  - Finance and Insurance
  - Public Administration
  - Total Employment

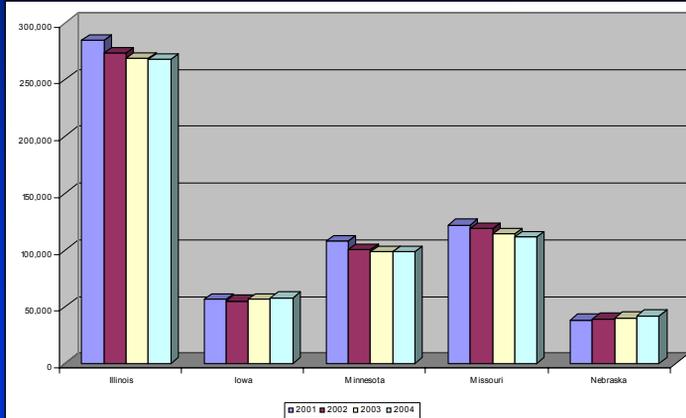
## Employment Base – Iowa vs. Peer States

- Manufacturing



## Employment Base – Iowa vs. Peer States

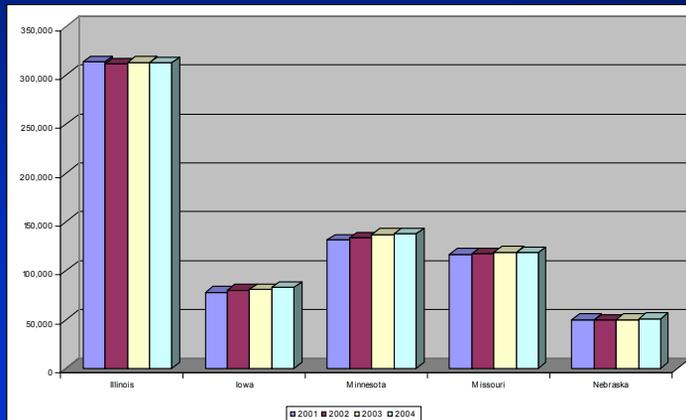
- Transportation and warehousing



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## Employment Base – Iowa vs. Peer States

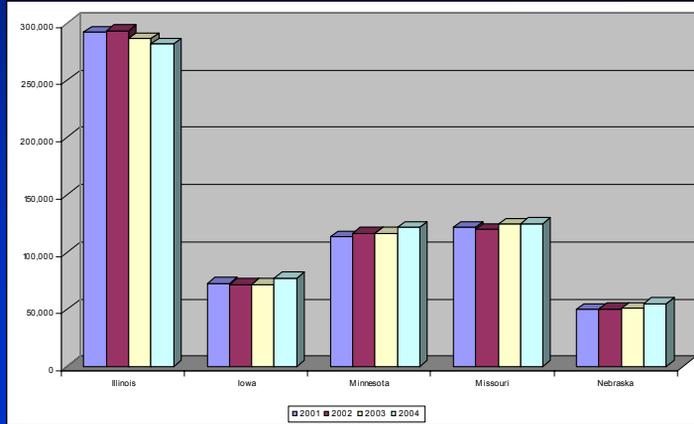
- Finance and Insurance



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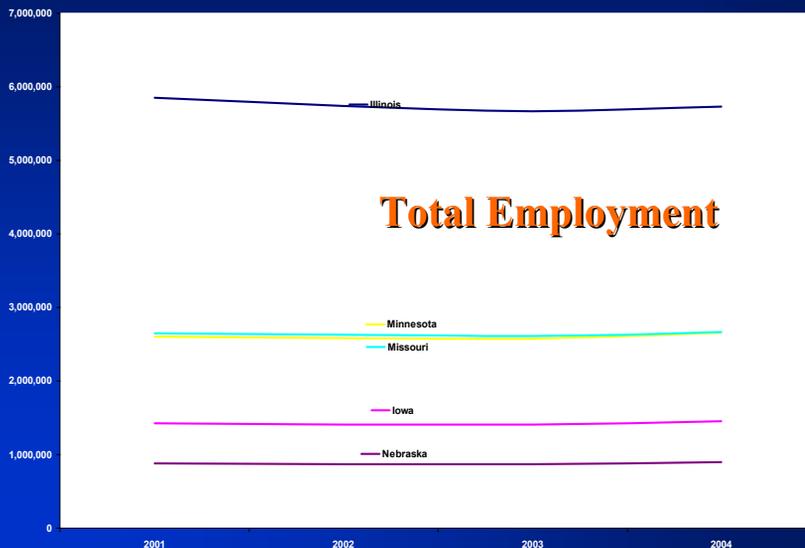
## Employment Base – Iowa vs. Peer States

- Public Administration



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## Employment Base – Iowa vs. Peer States



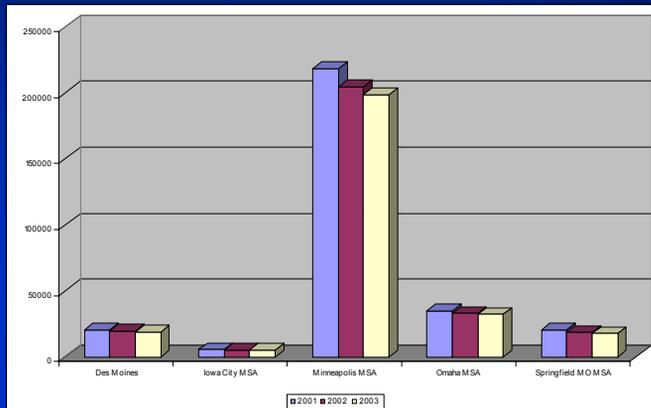
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## Employment Base – Des Moines MSA

- Des Moines vs. Peer MSAs
  - Minneapolis, Omaha, Springfield MO, Iowa City
- Key Employment Categories
  - Manufacturing
  - Transportation and warehousing
  - Finance and Insurance
  - Public Administration
  - Total Employment

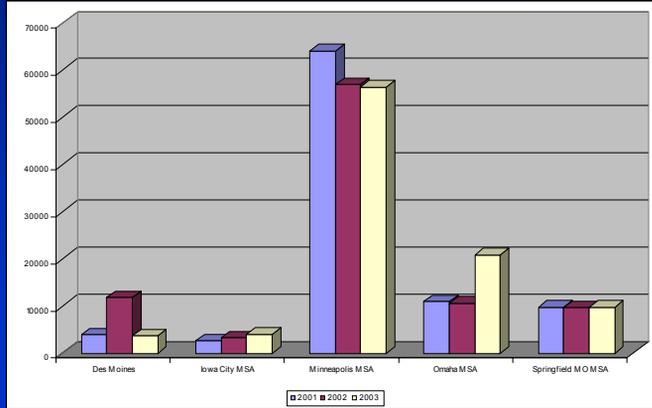
## Employment Base – Des Moines MSA vs. Peer MSAs

- Manufacturing



## Employment Base – Des Moines MSA vs. Peer MSAs

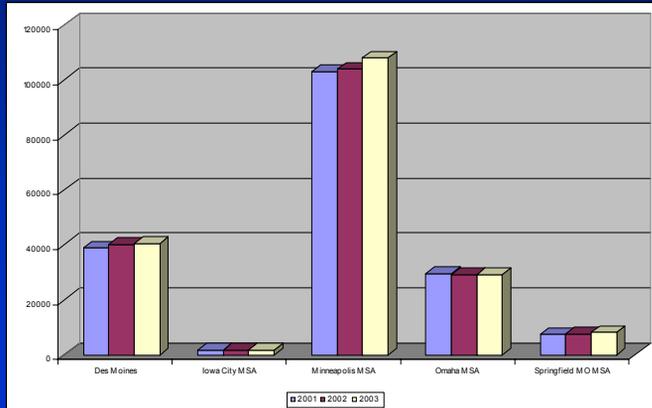
- Transportation and warehousing



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## Employment Base – Des Moines MSA vs. Peer MSAs

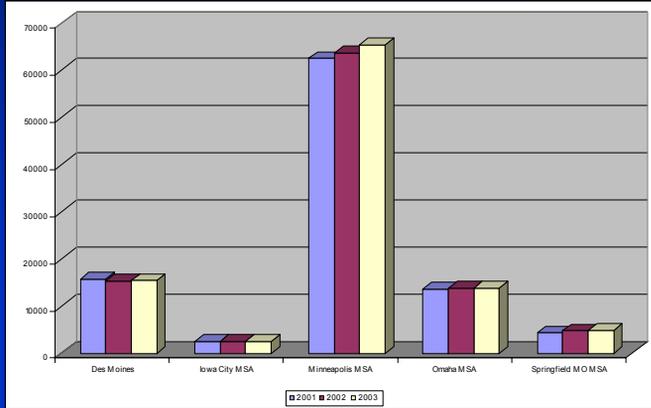
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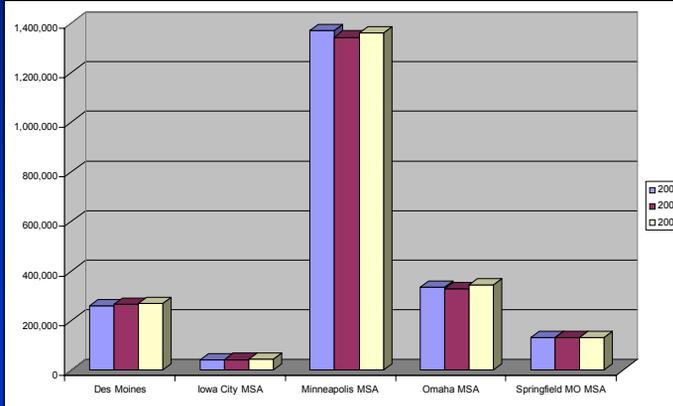
## Employment Base – Des Moines MSA vs. Peer MSAs

- Public Administration



## Employment Base – Des Moines MSA vs. Peer MSAs

- Total Employment



## Economic Base Analysis

- Retail Sales In-flow
  - 37% of all retail sales originated from non-Polk County residents in 2003
- Recent Expansion of Retail Space
  - Jordan Creek Mall, a General Growth property opened in the summer of 2004 in West Des Moines
- More retail potential possible?

## Economic Base Analysis

- Strong Office Base
  - Occupancy above 90% for all office classifications
  - 95% Class “A” office space
  - Core Des Moines Business District is retaining and expanding premier office space
  - New expansions to the west of back office and flex space

## Economic Base Analysis

- Industrial Space is being condensed
  - Firestone's 850,000 sf distribution facility consolidated other facilities
  - RR Donnelley's 640,000 sf shuttered facility remains vacant
  - Strong Occupancy / Weak Absorption
    - Manufacturing space is declining
    - <700,000 sq ft of Warehouse space absorbed annually since 2002
  - Manufacturing continues to contract – Can distribution and intermodal grow?

## Economic Base Analysis

- Next Research Steps
  - Summarize Task Force Input
  - Business Retention/Attraction Targets
  - Residential Development/In-fill Potentials
  - Education Institutions – Polk County Potentials
  - Regional Retail/Entertainment Potentials
- Economic Development Task Force
  - Continued Input
  - Next Meeting – March 2<sup>nd</sup>

## Task Force Discussion

- What are the three strongest attributes of the Polk County economy?
- What are three weaknesses/threats for improving Polk County's economy?
- What opportunities do you see in regards to Economic Development in Polk County over the next five (5) years?
- What are three threats to the economic growth of Polk County in the next five (5) years?