



Comprehensive Economic Development Strategy

2021-2025



Southeast Nebraska
Development District

Butler, Fillmore, Gage, Jefferson, Johnson, Lancaster, Nemaha, Otoe, Pawnee, Polk,
Richardson, Saline, Saunders, Seward, Thayer, and York

2021 SENDD COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY NOVEMBER 2021

The maps and graphics in this document are for planning purposes only. They are not adequate for legal boundary definition, regulatory interpretation, or parcel level analysis.

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CEDS Structure and Process





CEDS STRUCTURE AND PROCESS

Who
created
the CEDS?
What is it?
How and
why was it
created?

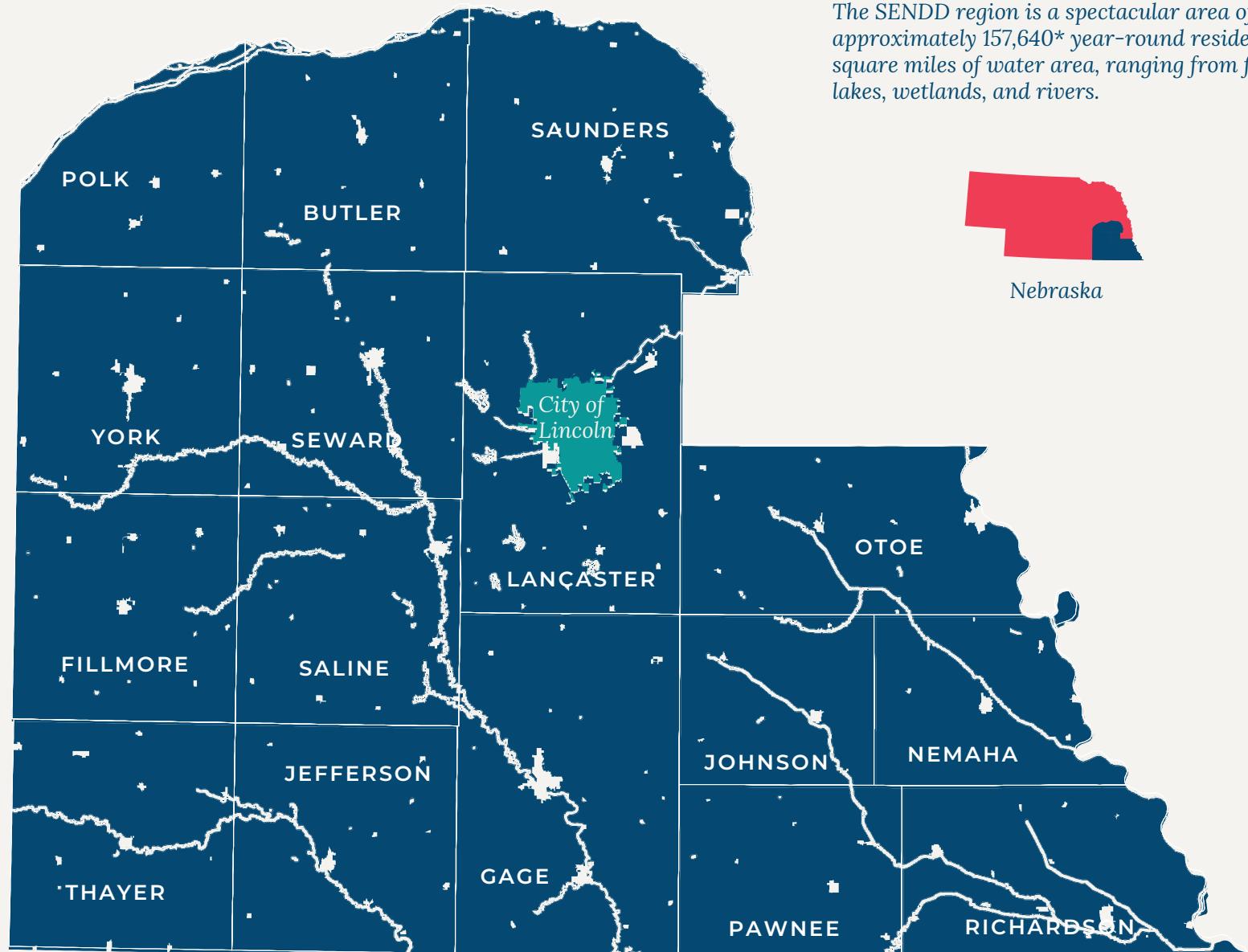
THE CEDS PLANNING STRUCTURE

The Comprehensive Economic Development Strategy (CEDS) is a continuous regional economic development planning process for southeast Nebraska, including its 16 member counties, to strengthen and sustain the region's economy. Economic development planning, as implemented through the CEDS, is not only a cornerstone of the U.S. Economic Development Administration's (EDA) programs, but serves as a means to engage community leaders, leverage the involvement of the private sector, and establish a strategic blueprint for regional collaboration.

Strategy Committee

The Strategy Committee is a 14-member volunteer advisory council that represents a broad spectrum of interests, including local economic development organizations, private industry, local governments, education and workforce, civic organizations, and minority and special interest groups.

The mission of the committee is to guide economic development policy in a way that will improve the quality of life for all, accelerate a healthy and vibrant economy offering a range of employment opportunities at sustainable wages for residents, and improve the welfare of the region's capital assets.



SENDD REGION

The SENDD region is a spectacular area of 16 counties, home to approximately 157,640* year-round residents, with over 36.5 square miles of water area, ranging from freshwater ponds to lakes, wetlands, and rivers.



Nebraska

* Does not include City of Lincoln

The committee is instrumental in the CEDS planning process. They contribute to a public participation process for the five-year update as well as the annual update, hosting public planning and workshop sessions, facilitating collaboration, and promoting information on the design, development, and implementation of the CEDS.

DEVELOPMENT OF THE CEDS FIVE YEAR PLAN

It is an accepted best practice to routinely revisit economic strategies; consequently, EDA requires all development districts within the United States to revise their CEDS every five years and update it annually. This document will serve as an update of SENDD's 2018-2023 CEDS to ensure it remains relevant. Amplifying the need to update the planning document is the convergence of recent technological advances and disaster conditions, which have impacted

much of the Midwest. The timing also ensures there is alignment with a collection of other state-wide plans that are geared towards the growth of the region.

The public participation process and this document were organized around answering questions EDA uses to outline its CEDS guidance document:

WHAT HAVE WE DONE IN THE PAST?

WHERE ARE WE NOW?

WHERE DO WE WANT TO BE IN 2030?

HOW DO WE GET THERE?

STRATEGY COMMITTEE MEMBERS

1. **Carley Bruning**, Thayer County Economic Development Alliance (TCEDA)
2. **Marguerite Himmelberg**, Southeast Community College (SCC)
3. **Lisa Hurley**, York County Development Corporation (YCDC)
4. **Caleb Fjone**, Ashland Area Economic Development Council (AAEDC)
5. **Dan Mauk**, Nebraska City Area Economic Development Corporation (NCAEDC)
6. **Brook Aken**, Omaha Public Power District (OPPD)
7. **Rick Nelsen**, Nebraska Public Power District (NPPD)
8. **Rex Nelson**, University of Nebraska at Lincoln-Extension
9. **Trevor Lee**, Gage Area Growth Enterprise (NGAGE)
10. **Jonathan Jank**, Seward County Chamber and Development Partnership (SCCDP)
11. **Stephanie Fisher**, City of Waverly
12. **Renee Dozier**, Region 5 Systems
13. **Theresa Klein**, Wahoo Chamber and Economic Development
14. **Lucas Froeschl**, Falls City Economic Development and Growth Enterprise (EDGE)

PUBLIC PARTICIPATION GOALS

The outreach goals for the CEDS included:

- Host planning and outreach activities accessible to all residents using a variety of methods for engagement and conveying information
- Establish a sense of community ownership of the plan and a commitment to its implementation to advance economic resilience
- Deliver clear and consistent communications that engage a broad audience from across the region

PLANNING STAGES

CEDS Strategy Committee –The Strategic Framework

The CEDS Strategy Committee refined and adopted the strategic framework for the CEDS. The goals and priorities were developed through an extensive stakeholder process. The CEDS committee had a kick off workshop on May 11, 2021, at the Jack Hunt Center for continuing education at Southeast Community College (SCC). There were 18 people in attendance. The speaker, SENDD staff, discussed an overview of the

CEDS process, data insights into the region, and building resilience throughout the region [See Appendix 1 for kick off meeting materials].

CEDS Stakeholder Workshop – Regional Priorities

The second CEDS workshop took place on June 15, 2021, at the James Hunt Center for continuing education at SCC [See Appendix 2 for workshop meeting materials]. There were 15 attendees, including economic development specialists, municipal and county staff, and educational and research representatives. The speaker discussed the current conditions of SENDD's economy before breaking out into two focus groups to complete a Strength, Weaknesses, Opportunities, and Threats (SWOT) analysis [the full SWOT outcomes list is available in Appendix 3]. The SWOT analysis informed the identification of six regional priorities.

The focus group sessions were organized around two topics essential to community and economic development: Equitable Growth and Connectivity/Resilience. The participants in these groups focused on the following:

The **Equitable Growth** group focused on economic development strategies such as business, housing, and workforce development. The group assessed resources for these strategies. Additionally, participants were asked to consider initiatives for collaboration, issues that affect regional business climate, and strategies to combat these issues within five years.

The **Connectivity/Resilience** group focused on regional infrastructure including wastewater, transit, broadband, energy, e.t.c. The group considered issues of availability, access, capacity, and the reliability of the infrastructure.

Work-group Process – The Action Plan

Following the June workshop, SENDD staff helped develop an action plan around the six regional priorities identified.

The focus groups were organized around the same key elements of community and economic development: Equitable Growth and Connectivity/Resilience. Each group identified projects, initiatives, and measures that could directly address the regional priorities within the five-year planning horizon. They discussed project goals,

potential partner agencies, time-frames, SMART (Specific, Measurable, Attainable, Relevant, and Timely) strategies, resources, and ways to identify and measure success of these projects.

CEDS Community Engagement Inputs from Digital Platforms

Prior to the stakeholder workshops, SENDD conducted an online survey to identify direction and goals. A total of 113 responses were collected, giving insight into existing regional challenges and suggesting solutions. Results from the survey can be seen in Appendix 4.

Public Comment

A draft of the 2021 CEDS was issued to the public for comments between September 28 and October 28, 2021. [Notes on public comments received can be found in Appendix 5]

CEDS Web-page

SENDD provided information about the 2021 CEDS on the SENDD website, located at www.sendd.org/ceds, including the planning process, a copy of the previous CEDS, meeting dates and materials.

REGIONAL PRIORITIES BY FOCUS-GROUP

The CEDS focus-group process helped to develop the action plan around the six regional priorities identified at the second workshop.

EQUITABLE GROWTH



Local Business

Support business development and entrepreneurship.



Housing Access and Affordability

Increase the availability of safe, affordable, and quality housing within the region.



Regional Engagement

Increase engagement with member and non-member communities through stronger communication & marketing

CONNECTIVITY/RESILIENCE



Infrastructure Development

Enhance and strengthen our regional infrastructure to ensure long-term sustainability and economic growth



Quality of Life

Enhance the quality of life to support childcare, recreation and tourism



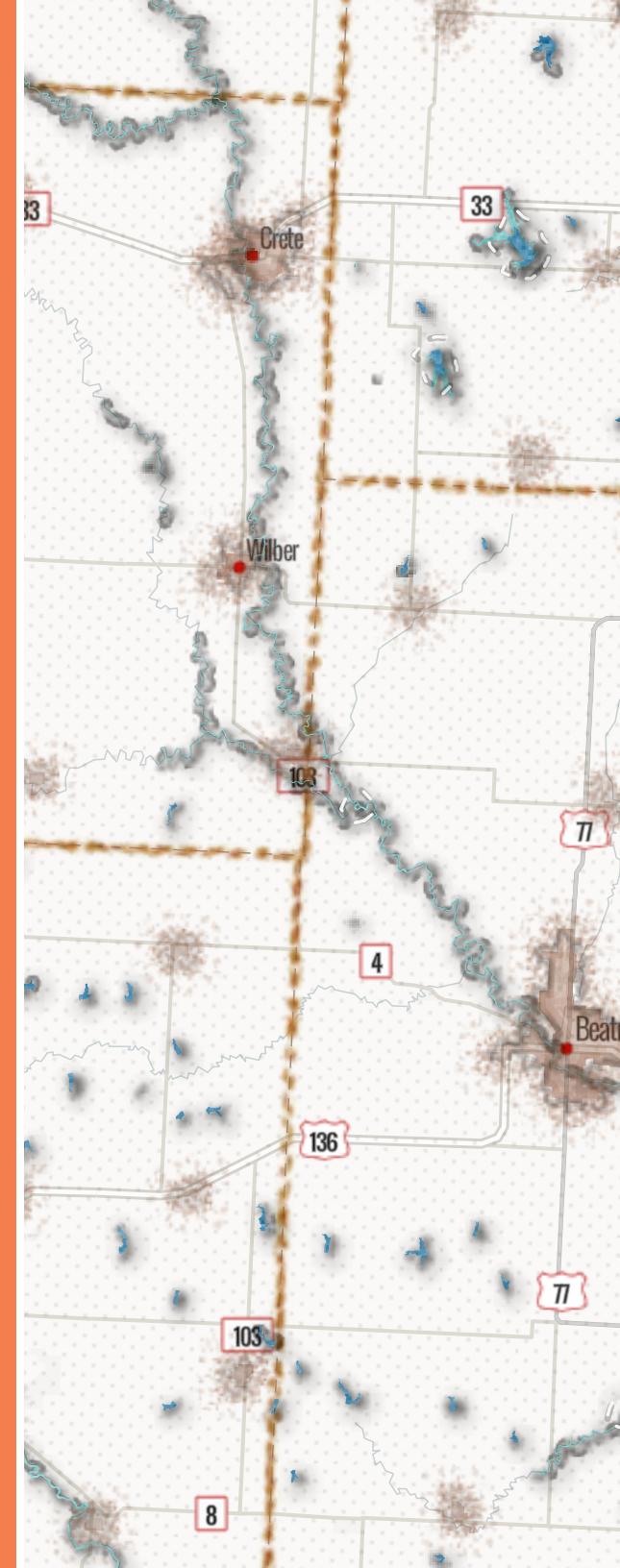
Disaster Planning and Resilience

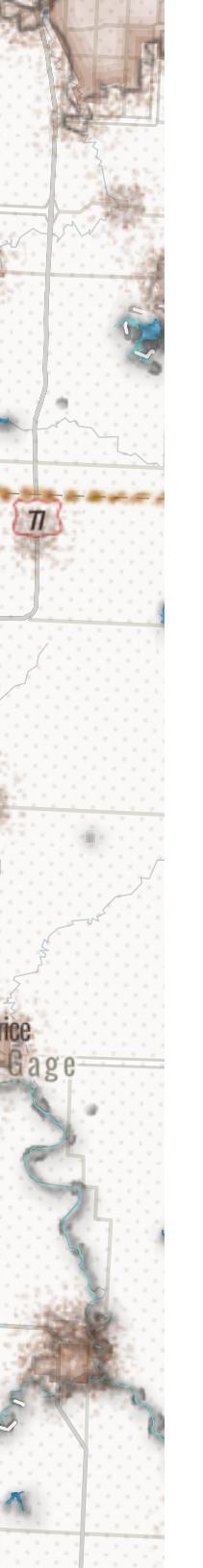
Increase awareness for disaster preparedness and mitigation by enhancing community resilience



Regional Economic Overview

2





REGIONAL ECONOMIC OVERVIEW

Where have
we been
and where
are we
now?

COUNTY-LEVEL PROFILES

The SENDD region is a spectacular area of 16 counties, home to approximately 157,640* year-round residents.¹ The region has over 36.5 square miles² of water bodies ranging from freshwater ponds to lakes, wetlands, rivers, and a vast land area spanning over 9,306.4 square miles. The natural beauty, environmental resources, protected open space, rich cultural history, ecological resources, and rural character provide the region with intrinsic wealth.

The region boasts a mix of historic villages, market districts, and downtowns with clustered

areas of suburban development. With the exclusion of the City of Lincoln, Lancaster County has the highest population, closely followed by Gage County, which has the largest land area (659.9 square miles) and slightly more than 21,000 people.³ Saunders County has the most significant water area at 4.9 square miles, and a considerable portion of its land is on the Special Flood Hazard Area (SFHA), allowing for rapid development in clusters outside the floodplain zone. Overall, manufacturing, healthcare/social services, and retail trade are the biggest industries in the region employing over 60% of the workforce in the area.⁴

-
- * Does not include City of Lincoln
 - 1 2019 American Community Survey, U.S. Census Bureau
 - 2 2019 American Community Survey, U.S. Census Bureau
 - 3 ESRI ACS 2019 Population variable
 - 4 2019 Stats America Data

BUTLER584 mi²

Population		8,029
Total Housing Units		4,075
Vacant Housing		712 (17.5%)
Ag Land size		374,138 ac

Median Age **43**Median Household Income **\$58,979**

Top 3 Industry Sectors
 MANUFACTURING (20.2%)
 PUBLIC ADMINISTRATION (10%)
 RETAIL TRADE (7.5%)

FILLMORE575 mi²

Population		5,547
Total Housing Units		2,928
Vacant Housing		418 (14.3%)
Ag Land size		329,466 ac

Median Age **47**Median Household Income **\$60,313**

Top 3 Industry Sectors
 RETAIL TRADE (9.7%)
 CONSTRUCTION (8.6%)
 HEALTHCARE AND SOCIAL SERVICES (8.6%)

GAGE851 mi²

Population		21,594
Total Housing Units		10,449
Vacant Housing		1,462 (14.1%)
Ag Land size		538,982 ac

Median Age **43.8**Median Household Income **\$53,110**

Top 3 Industry Sectors
 MANUFACTURING (17.1%)
 RETAIL TRADE (12.8%)
 EDUCATIONAL SERVICES (8.7%)

JEFFERSON570 mi²

Population		7,144
Total Housing Units		3,921
Vacant Housing		620 (15.8%)
Ag Land size		358,869 ac

Median Age **46.5**Median Household Income **\$44,510**

Top 3 Industry Sectors
 MANUFACTURING (18%)
 HEALTHCARE AND SOCIAL SERVICES (13.9%)
 RETAIL TRADE (12.5%)

JOHNSON

376 mi²

Population	5,161	Median Age	40.9
Total Housing Units	2,175	Median Household Income	\$54,712
Vacant Housing	366 (16.8%)	Top 3 Industry Sectors	RETAIL TRADE (9.8%) HEALTHCARE AND SOCIAL SERVICES (7.4%) PUBLIC ADMINISTRATION (6.6%)
Ag Land size	197,399 ac		

LANCASTER

838 mi²

Population	29,319*	Median Age	33.5
Total Housing Units	131,099	Median Household Income	\$60,527
Vacant Housing	6,775 (5.2%)	Top 3 Industry Sectors	HEALTHCARE AND SOCIAL SERVICES (14.1%) RETAIL TRADE (10.4%) PUBLIC ADMINISTRATION (8.0%)
Ag Land size	422,996 ac		

NEMAHA

407 mi²

Population	6,973	Median Age	39.3
Total Housing Units	3,501	Median Household Income	\$51,828
Vacant Housing	524 (15.0%)	Top 3 Industry Sectors	HEALTHCARE AND SOCIAL SERVICES (9.2%) PUBLIC ADMINISTRATION (8.5%) RETAIL TRADE (7.6%)
Ag Land size	260,810 ac		

OTOE

616 mi²

Population	15,949	Median Age	41.4
Total Housing Units	7,169	Median Household Income	\$59,167
Vacant Housing	659 (9.2%)	Top 3 Industry Sectors	MANUFACTURING (22%) HEALTHCARE AND SOCIAL SERVICES (13%) EDUCATIONAL SERVICES (8.1%)
Ag Land size	390,020 ac		

* Refers to the total population of Lancaster county minus the total population of City of Lincoln.

PAWNEE

450 mi²

Population	2,649	Median Age	50.0
Total Housing Units	1,627	Median Household Income	\$46,452
Vacant Housing	405 (24.9%)	Top 3 Industry Sectors	MANUFACTURING (23.5%) HEALTHCARE AND SOCIAL SERVICES (8.5%) RETAIL TRADE (8.6%)
Ag Land size	272,565 ac		

POLK

438 mi²

Population	5,225	Median Age	45.0
Total Housing Units	2,751	Median Household Income	\$67,719
Vacant Housing	699 (25.4%)	Top 3 Industry Sectors	RETAIL TRADE (12.2%) HEALTHCARE AND SOCIAL SERVICES (11.9%) WHOLESALE TRADE (6.5%)
Ag Land size	251,028 ac		

RICHARDSON

552 mi²

Population	7,961	Median Age	47.7
Total Housing Units	4,408	Median Household Income	\$47,917
Vacant Housing	704 (16%)	Top 3 Industry Sectors	MANUFACTURING (10.5%) RETAIL TRADE (10.4%) PUBLIC ADMINISTRATION (10.3%)
Ag Land size	341,944 ac		

SALINE

574 mi²

Population	14,270	Median Age	35.5
Total Housing Units	5,858	Median Household Income	\$51,502
Vacant Housing	701 (12%)	Top 3 Industry Sectors	MANUFACTURING (41.4%) EDUCATIONAL SERVICES (10.5%) RETAIL TRADE (7.6%)
Ag Land size	360,323 ac		

SAUNDERS

750 mi²

Population	21,165	Median Age	41.2
Total Housing Units	9,694	Median Household Income	\$68,682
Vacant Housing	1,193 (12.3%)	Top 3 Industry Sectors	RETAIL TRADE (12.3%) CONSTRUCTION (11.2%) HEALTHCARE AND SOCIAL SERVICES (8.0%)
Ag Land size	497,761 ac		

SEWARD

571 mi²

Population	17,171	Median Age	38.0
Total Housing Units	7,159	Median Household Income	\$70,389
Vacant Housing	559 (7.8%)	Top 3 Industry Sectors	MANUFACTURING (17.6%) EDUCATIONAL SERVICES (12.1%) RETAIL TRADE (9.3%)
Ag Land size	363,385 ac		

THAYER

573 mi²

Population	5,057	Median Age	46.5
Total Housing Units	2,753	Median Household Income	\$51,821
Vacant Housing	509 (18.5%)	Top 3 Industry Sectors	MANUFACTURING (25%) HEALTHCARE AND SOCIAL SERVICES (16.4%) EDUCATIONAL SERVICES (10.1%)
Ag Land size	325,649 ac		

YORK

574 mi²

Population	13,745	Median Age	39.9
Total Housing Units	6,327	Median Household Income	\$60,298
Vacant Housing	671 (10.6%)	Top 3 Industry Sectors	MANUFACTURING (12.5%) RETAIL TRADE (10.9%) ACCOMMODATION AND FOOD SERVICES (10.6%)
Ag Land size	346,602 ac		

SOCIOECONOMIC PROFILE

Population

With the exception of a handful of cities, the SENDD region is primarily rural with 71% (105 of the 148 jurisdictions - not including Lincoln) having populations of less than 500 residents.⁵ Even further, a significant portion (20%) of these communities have fewer than 100 residents. Since 2010, many of the smaller communities have continued a downward trend in regard to population; this is reflected in overall county populations.

According to U.S. Census data, between 2010 and 2019, only six of SENDD's 16 counties gained population, with the largest growth occurring in Lancaster County (12%). The others that grew in population include Otoe (264 residents, 1.7%), Saline (2, 0.01%), Saunders (709, 3.4%), Seward (485, 2.9%), and York (10, 0.07%). The remaining 10 counties lost between 3% and 7% of their population over the last decade. A common theme with the counties that did not lose population is their proximity to I-80, Hwy. 2, and Lincoln or Omaha.

Median Age

While population is one traditional indicator for economic growth (workforce, output, etc.), another is an area's median age. The median age is the age that divides a population into two equal groups, where half are younger than the median number and the other half is older. It is a single index that summarizes the age distribution of a population. When population and age are coupled, a picture of the region's trajectory begins to develop. For SENDD's region, this image appears unclear.

Taking a closer look at the region's median age from the 2010 and 2019 Census, overall the region got younger as the averaged 2019 median age (44.6) decreased nearly a year from the averaged 2010 median age of 45.4 years old. In spite of this, SENDD's area remains nearly seven years older than both the U.S. and Nebraska median age (37.9 and 36.8, respectively); surprisingly, Nebraska has the fifth lowest median age by state in the nation.⁶ Examining 2019 Center for Disease Control and Prevention's (CDC) data,⁷ one possible reason why both population and age have decreased across the region might be the combination of low birth rates and overall mortality rate.

Nebraska's fertility rate is the fifth lowest in the nation at 66.2 (births per 1,000 women), which partially implies fewer births are occurring in the SENDD region. Additionally, SENDD's region has an older population.

When comparing the national average (15.64%) of residents 65-years and older and Nebraska's state average (15.36%) to SENDD's averaged percentage (21.6%)⁸ of residents in this category, the region exceeds both the national and state average by 5.9% and 6.26% respectively. If this trend continues, it will contribute to an already existing workforce issue.

Sex / Gender

The region's population distribution is relatively balanced between males (50.3%) and females (49.7%). The exception is Johnson County where males make up 59.2% of the population, which might be skewed by the presence of Tecumseh State Correctional Institution.

Median Household Income

Median Household Income (MHI) is a clear indicator of a community's financial trajectory. Jurisdictions that consistently fall below regional, state, or national MHIs

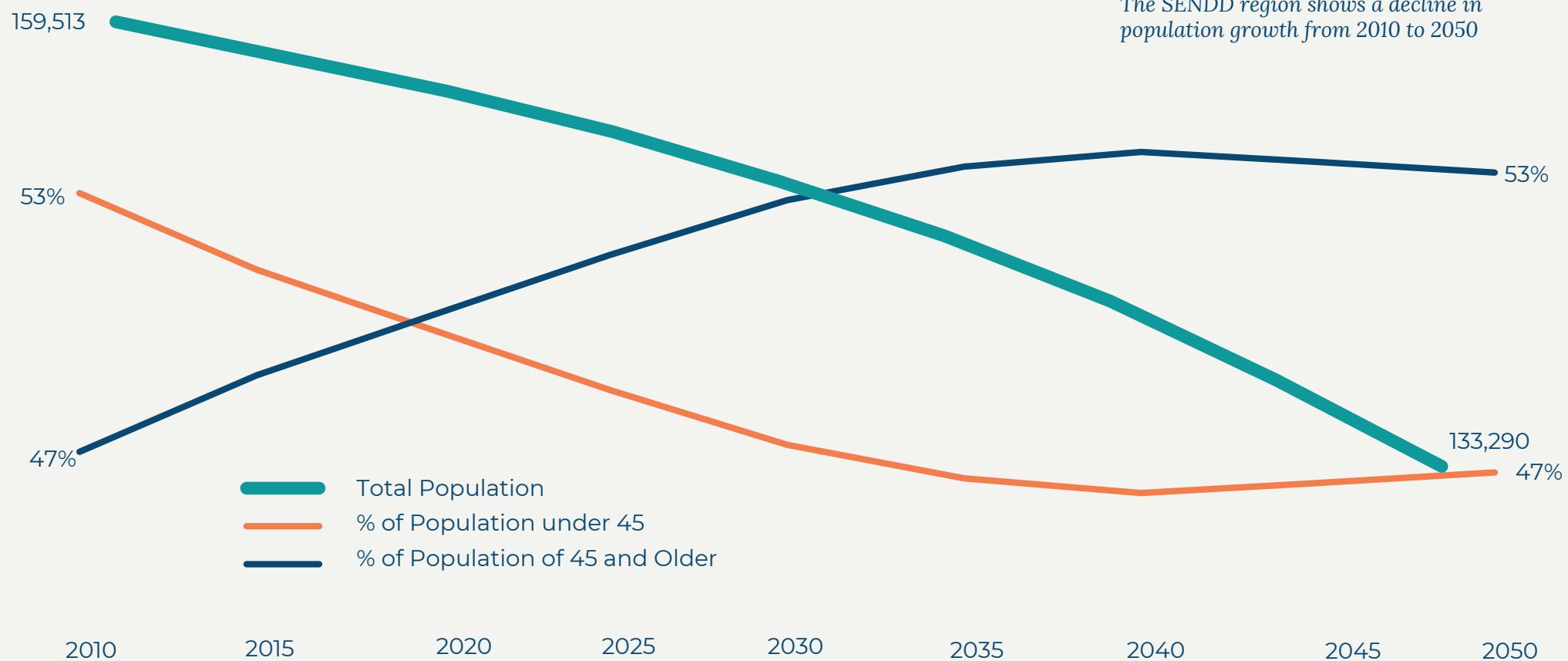
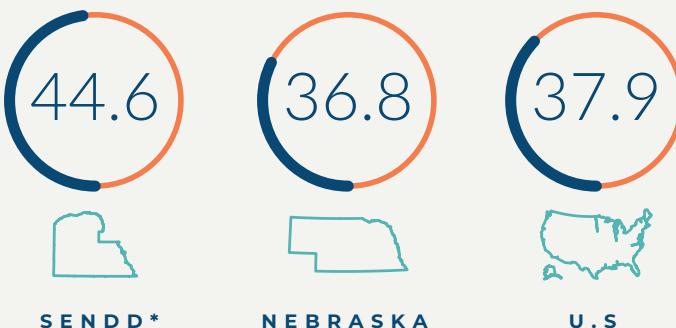
5 2021 U.S. Census

6 U.S. Census and StatsAmerica - June 2021

7 National Center for Health Statistics - June 2021

8 Does not include Lancaster County

2019 AVERAGE MEDIAN AGE



Source: December 2015 Nebraska County Projections, Center for Public Affairs Research, UNO, 2021 U.S Census
* Does not include Lancaster County

tend to struggle, while those near or above these numbers typically enjoy a higher quality of life. Comparing the averaged MHI for SENDD's region for the 2010 and 2019 Census to both Nebraska's and U.S. MHI, the region continues to lag behind for either reporting periods.⁹

In spite of an overall depressed ag-economy, (2016-2020) the district's MHI did improve from 2010 with some counties considerably better off in regard to income. Saunders and Seward counties lead the region by exceeding both the state and national MHI, while Pawnee and Richardson counties continue to struggle.

Race and Ethnicity

Based on the U.S. Census data, the 2019 population by race data for SENDD's region is fairly homogeneous with nearly 8 out of 10 (78.2%) of the population being White. Noting that this demographic does not include Lancaster County (due to the City of Lincoln skewing the data), most minority populations in the region increased between 2010 and 2019. The Census figures indicate the fastest growing race by percentage is American Indian or Alaska Native (559 or 40%); however, if you consider growth by whole numbers, the largest increase is in

Hispanic and Latina/o/x residents (2,761 or 28%). Other notable statistics include persons identifying as Two or More Race groups expanded by 35% (830), Black residents increased by 37% (638), and White residents decreased by 3% (-4,441). A handful of these trends align with statewide demographics, while others do not. For example, statewide, White population grew by 3% and other race groups increased at a slower pace across Nebraska (Hispanic - 23%, American Indian or Alaska Native - 19%, and Black - 14%), all notably less than the SENDD region during the same time period.

Educational Attainment

Educational attainment for the region mirrors the state's education levels with the highest percentage (25.8%) of area residents having a high school diploma or equivalent compared to the state's average of 25.7%. The lowest percentage for both the region and the state is individuals achieving less than a ninth grade education (3% and 3.4%, respectively).

ENVIRONMENTAL BASELINE

The natural systems of southeast Nebraska center around green spaces, lakes, and agricultural-dependent resources and habitats. These systems are an integral part of life in the area.

The region primarily comprises of about 3,000 acres of saline wetland and about 8,000 acres of playa wetlands that support much of the plant species and wildlife that makes the region such an environmentally rich and interesting place. Wetlands play a vital role in regulating the environment by absorbing and filtering storm and flood waters, providing natural removal of nitrogen, improving water quality, creating recreational and educational opportunities, and serving vital habitat for wildlife, freshwater animals and unusual plants.¹⁰

The Eastern saline wetland, which is only present in Lancaster County, contains the most limited and endangered vegetation community in the state.¹¹

The region is dominated by the Central Great Plains and Western Corn Belt Plains Eco-region. Tallgrass prairie with scattered oak-hickory forests along stream valleys, as

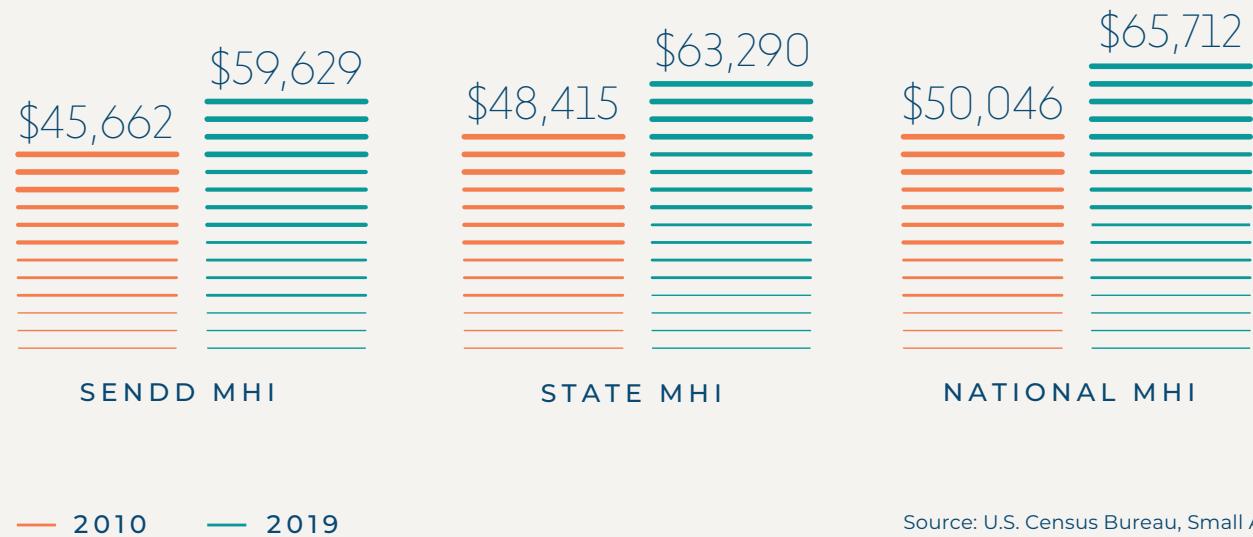
9 U.S. Census Bureau, Small Area Income and Poverty Estimates (SAIPE)

10 Guide to Nebraska's Wetlands and Their Conservation Needs, 2005

11 Guide to Nebraska's Wetlands and Their Conservation Needs, 2005

MEDIAN HOUSEHOLD INCOME

The SENDD Averaged Median Household Income (MHI) is lower than the national MHI and that of Nebraska



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

well as mixed grass prairie, are among the primary vegetation types found in these Ecoregions.¹² The most abundant prairie is the upland tall grass prairie. This prairie type has a widespread distribution and can also be found in Central and Western Nebraska. White-tailed deer are common big game animals found in these upland grasslands. The most abundant large predator of the region is the coyote, but other predators such as the red fox and American badger are found here as well. The bobcat, least weasel, long-tailed weasel, and American mink can

be found in the region.

The open space of the region— over 100,000 acres of which are protected in perpetuity—is critical to the health of the region's natural systems, economy, and population.¹³ Open space provides habitat for the region's diverse species and conservation of the region's drinking water supply. Wooded open space provides a carbon sink for mitigating the impacts of environmental pollution, both through the storage of carbon that would otherwise be lost to the atmosphere through development, and

through the carbon-absorbing capacity of trees. Open space contributes significantly to the natural and rural character of the region and supports key industries. The lakes, farms, grasslands, and marshes of the region provide recreational outdoor activities that attract visitors and residents to the region and provide the necessary land and resources for the region's agricultural and recreational activities like fishing and hunting.¹⁴

12 Nebraska Prairie, July 21, 2014

13 2021 USA protected areas by FEMA on ESRI

14 Nebraska Prairie, July 21, 2014

Geography

The southeast corner of Nebraska has a unique geography, which is primarily utilized for agriculture. Sixty-two percent of land use is designated as some form of agriculture-related venture. Within the designated land, 91% produces corn or soybeans.

The Platte River bounds the northern edges of Butler, Polk, and Saunders counties, serving as one of the two primary water sources in the state. The Missouri River creates the eastern border of Nebraska, separating the state from Iowa. The River serves as the second primary water source flowing along the borders of Otoe, Nemaha, and Richardson counties. SENDD's region is also home to the Little Blue and Big Blue Rivers, which serve as tributaries to the Missouri River.

The makeup of the SENDD region topographies can best be defined as east and west. Traveling toward the eastern counties, the terrain becomes rolling hills with rounded ridge tops, and well-defined drainage ways. In the western part of the SENDD region, the topography begins to flatten into plains with rolling upland slopes.

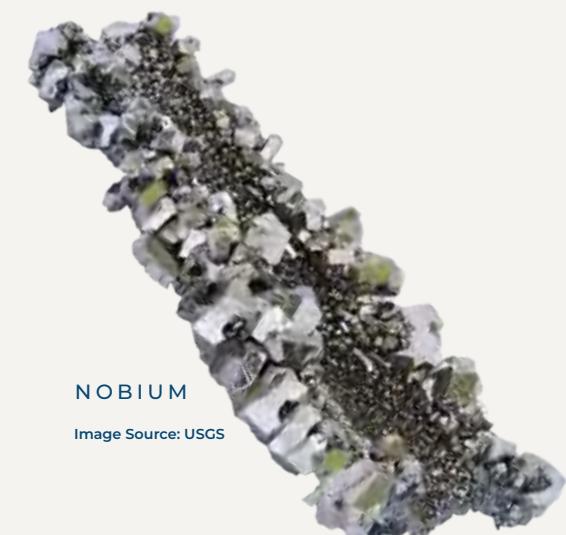
The minor topographic classifications in the region are just as important to understanding

the geographic features of the SENDD region. The Platte and Missouri Rivers attribute to the minor valleys, bluffs, and steep escarpments. Saline, Jefferson, and Thayer counties are home to dissected plains. The terrain includes rolling hills, flat-topped divides, large stream valleys, and small upland drainage ways.

Soils and minerals also contribute to geographic makeup. The SENDD region has loess soils,¹⁵ which are among the most fertile in the world. The abundance of silt particles provides a steady supply of plants and crops. Plants and crops grown in loess soils have extensive root penetration, good soil aeration, available water, and good production due to easier cultivation. The geography in the region provides an increased focus on agriculture; however, the extensive limestone deposits are the basis for a large road-aggregate, agriculture-lime, and Portland-cement industry. This is the basis for Jefferson County's large employer, Endicott Clay. Endicott Clay mines and manufactures brick and pavers from these mineral deposits.

Another notable geographic attribute located in SENDD's region are deposits of niobium, scandium, and titanium that were discovered in the early 2000s in Johnson County. These rare elements are deemed essential to the national economy and defense. NioCorp, owner of the Elk Creek mine, is a rare earth element mining company focused on development of these rare earth elements into superalloys throughout different sectors including automotive, aerospace, clean energy, and megasteel infrastructure.

Plans are underway to begin mining these elements, which are anticipated to create over 1,500 jobs and result in a regional investment exceeding \$500 million. The mine would have a cumulative revenue of \$2.9 billion over the first five (5) years of operation in the SENDD region.



NOBIUM

Image Source: USGS

Climate

Climate is the composite or generally prevailing weather conditions of a region, as temperature, air pressure, humidity, precipitation, sunshine, cloudiness, and winds, throughout the year, averaged over a series of years.¹⁶

The climate for the SENDD region is consistent with many Midwest states. The SENDD region has higher precipitation rates in the spring and summer months (March through September) with an average of 3.50 inches compared to a lower precipitation average of 1.31 inches during the autumn

and winter months (October through February).

Southeast Nebraska enjoys above freezing temperatures by March with averages around 40°F, which makes it favorable for planting season by April.¹⁷ On average, corn in Nebraska is planted from April 15 to June 5, although a majority of the crop is planted between April 25 and May 20 with average temperatures for farming around the 70s.¹⁸

CAPITAL INFRASTRUCTURE ASSETS

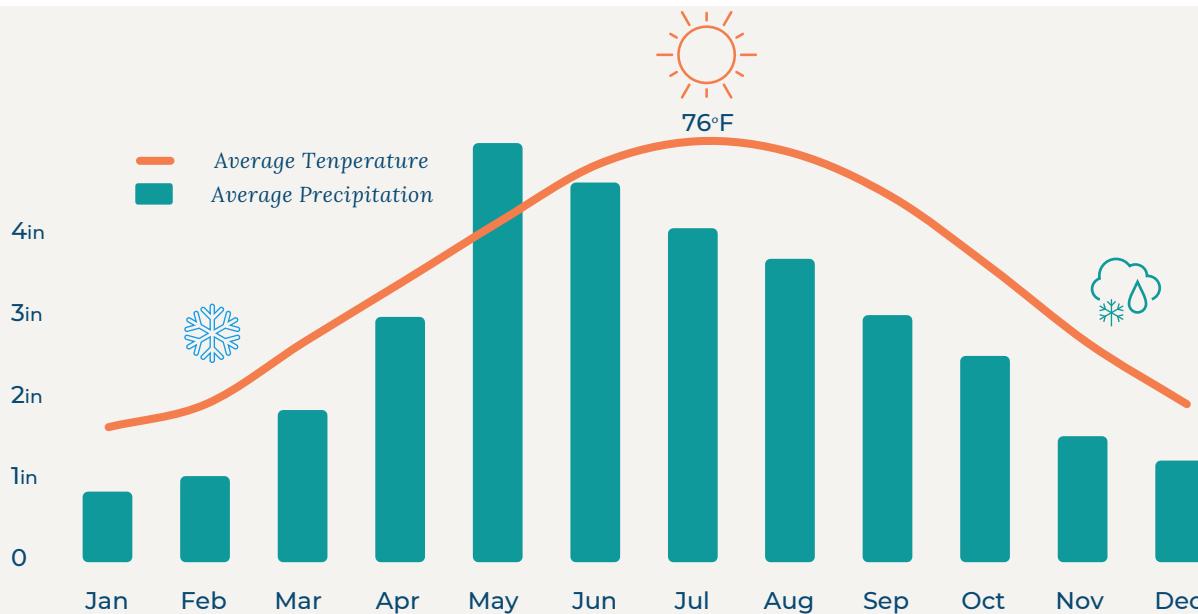
Water and Wastewater Infrastructure

Residents, businesses, and industrial partners across southeast Nebraska rely on the capacity of local water and wastewater infrastructure to meet their diverse needs. Regional challenges to water infrastructure include adequate water supply; the presence of mineral, chemical or biological contaminants; flood hazards; aging or absent infrastructure; and the local need for asset management or financial technical assistance.

16 Dictionary.com. (n.d.). Climate definition & meaning. Dictionary.com. Retrieved July 19, 2021

17 Climographs. Nebraska State Climate Office

18 Climate & Irrigation. Nebraska Corn Board. (2019).



CLIMATE

Observed warming since the mid-20th century has been uneven in the Southeast region, with average daily minimum temperatures increasing three times faster than average daily maximum temperatures. The number of extreme rainfall events is increasing. Climate model simulations of future conditions project increases in both temperature and extreme precipitation.

Trends towards a more urbanized and denser Southeast are expected to continue, creating new climate vulnerabilities. Cities across the Southeast are experiencing more and longer summer heat waves.

Industrial and livestock waste discharge, chemigation, and agricultural chemical containment can also significantly impact local water quality. Local waterways, beaches, and streams are subject to additional monitoring to ensure the safety of recreational users.

Nebraska is one of the most groundwater-rich places in the world, thanks in large part to the High Plains Aquifer, and to secondary aquifers such as the Dakota and Niobrara aquifers used for drinking water in the eastern portion of the State. However, large portions of the SENDD region do not have access to reliable groundwater sources.

As some communities continue to replace flood-damaged or aging water infrastructure, other communities are seeking to build capacity to support residential or industrial growth. Across the region, responsible management of groundwater and surface water is a top priority for communities, counties, natural resource district, state agencies, etc.

Support for small water systems, water operators, boards and councils is provided by the Nebraska Department of Environment and Energy (NDEE), which provides capacity development resources and water operator training throughout the year. Additional training and technical assistance is provided

by Nebraska Rural Water Association (NRWA) and Midwest Assistance Program (MAP) under contract with state agencies.¹⁹

Telecommunication & Broadband

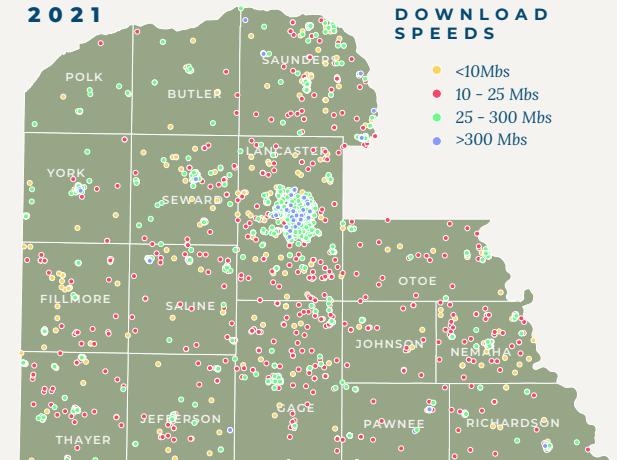
Broadband refers to high-speed Internet access. The Federal Communications Commission (FCC) defines broadband as the minimum threshold of "what a typical household needs to have in order to take full advantage of modern applications on the Internet".²⁰ Currently, this acceptable household minimum is 25 Mbps (megabits per second) for download speed and 3 Mbps upload speed. If a system is incapable of reaching these speeds, it is not considered broadband.

The lack of high-speed Internet in rural America is often referred to as the Digital Divide, and for many years rural residents have pressed for reliable, affordable broadband services. The COVID-19 pandemic compounded problems as existing Internet Service Provider's (ISP) limited bandwidths could not support the demands placed on them as students and workers began virtual learning and teleworking.

Beginning in 2020, SENDD partnered with the Nebraska Regional Officials Council (NROC)

BROADBAND MAPPING PROJECT

2021



Source: SENDD Broadband Mapping Initiative,
Last updated 10/14/2021

to launch a statewide broadband speed-test mapping initiative, which can be found at www.sendd.org/broadband. The dynamic, crowdsourced tool allowed for up-to-date, parcel-level data collection on all internet-enabled devices. The aim of this ongoing initiative is to bridge the digital divide between urban and rural areas. As unserved and underserved areas are labeled through this project, stakeholders, and economic developers can plan for the potential expansion of broadband infrastructure that will support businesses and residents both now and in the future.

The SENDD CED's Survey indicates the disparity of broadband access in Lincoln and Omaha compared to rural areas of

19 EPA, Guidance for Small Community Water Systems on Risk and Resilience Assessments under America's Water Infrastructure Act, May 2020

20 Christopher Mitchell, "SENDD Broadband 101 Series – Part One, May 12, 2021.

Nebraska, and continues to be apparent as respondents noted lack of speeds and unreliable service. Much of this can be attributed to Internet Service Providers' (ISP) lack of investment in expanding broadband infrastructure, which is likely related to fewer customers (i.e. return on investment). The lack of investment is evident when reviewing NROC's statewide broadband speed test map as well as visiting with area residents; fewer customers equates to fewer ISPs and less competition.

SENDD will continue working towards improving broadband services by coordinating efforts with public and private entities to ensure better access for all southeast Nebraska residents and businesses. These efforts might include advocating on behalf of rural families, pursuing state and federal grant opportunities, and building regional plans for broadband deployment.

Energy

Nebraska is the only state with electricity provided entirely by publicly-owned suppliers including public power districts, electric cooperatives, municipal electric systems, joint action agencies, or a combination. The average retail price of

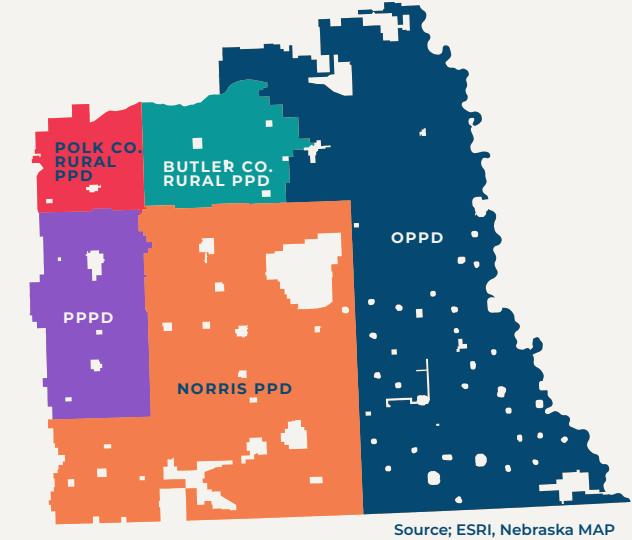
electricity is among the lowest in the country, while sales are the highest. Nebraska has the third largest number of industrial electricity customers, behind Texas and California. "Overall, more electricity is produced in Nebraska than is consumed there, and, in 2019, about 13% of the state's net generation was sent to the regional grid."²¹

SENDD's region is served by six public power districts, all owned by the public and regulated by local Power Review Boards. These boards control rates to meet the needs of the community.

The state consumes electricity generated from a variety of sources, but more than half comes from coal-fired power plants. However, coal generated electricity is at its lowest level since 1990 and continues to drop as more renewable energy sources are brought in. Wind, nuclear, natural gas, and hydroelectric make up the rest of the sources.

Renewable energy has been increasing in the state and now contributes to almost 30% of the state's net generation. Wind power contributed nearly a quarter of the electricity generated in the state in 2020, nearly three times higher than 2015. The Energy Information Administration (EIA) notes that Nebraska has excellent potential for wind energy. Hydroelectric power rounds out the renewable energy generation sources, but there's little potential for expansion beyond

ENERGY



Source: ESRI, Nebraska MAP

micro-hydroelectric dams.

Currently, solar power makes up only 0.2% of net generation, but that has doubled in the last two years. More solar facilities are in development across the state, but the western portion has the greatest potential for these facilities. Similarly, geothermal energy has potential, but there are limited areas where it would be the most feasible, and currently the state does not generate any electricity from this source.

Transportation

The southeast Nebraska region has ample access to transportation routes, making it an ideal distribution point for many industries. Interstate 80 runs east-west through the northern half of the district while US highways 6, 34, 75, 77, 81, and

136 provide additional routes for heavier traffic to navigate the region. Numerous state highways and smaller roadways make up the rest of the vehicular traffic paths through the region. It should be noted that US Highway 136 is also one of the state's nine scenic byways, and is served by the Nebraska Heritage Highway Byway Association, which is "dedicated to resource development, historic preservation and interpretation, and promoting tourism in the region."²²

While the Lincoln Airport is the only commercial airport located in SENDD's region, Kansas City, Omaha, Des Moines, and Grand Island all have commercial airports and are within a three-hour drive. These five airports provide direct flights through a variety of major airlines to over one hundred cities across the country, including international flights. There are over a dozen municipal airports throughout the region as well.

The railroads throughout the district are vitally important for the distribution of farm and energy-related products. Both Union Pacific and BNSF Railway own multiple railroads in the area. While rail traffic in the region and across the state is primarily for commodities, Amtrak also operates the California Zephyr, which runs from Chicago to San Francisco. The line has five stops in Nebraska, including Lincoln, providing a

point of access for those wishing to travel by rail. The railroad's presence generates multiple opportunities for economic growth. Currently, two communities are planning rail campuses in their industrial parks.

Alternative transportation mechanisms such as biking and walking are growing in popularity because people want to live an active and slower paced lifestyle. In the SENDD region, one such walk-ability project is the MINK Corridor Bike Route. SENDD continues to encourage communities to participate in the Recreational Trails Program (RTP) offered by the Nebraska Games and Parks Commission.

Housing

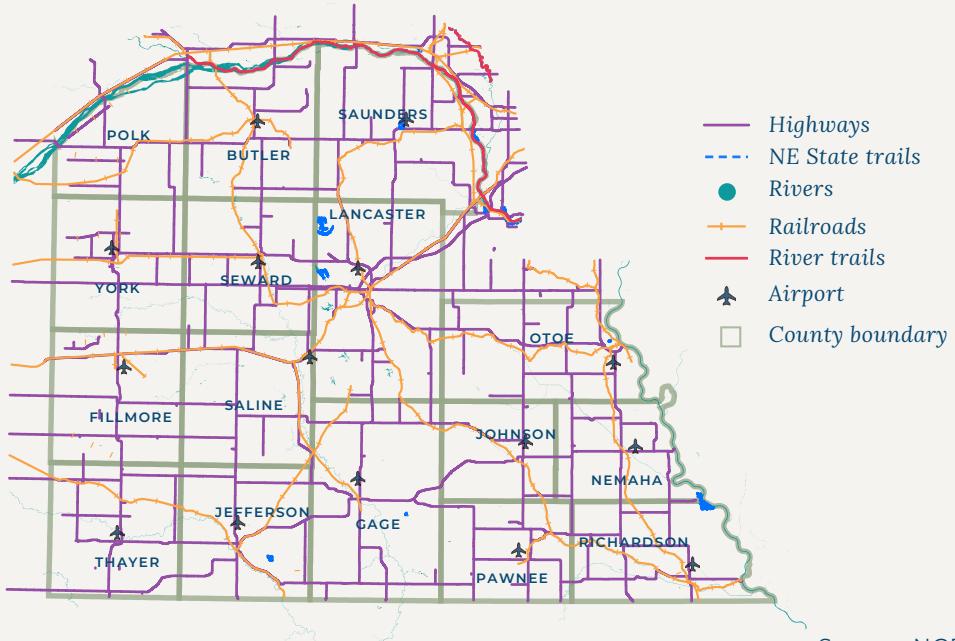
The median value of homes in the SENDD region is \$106,800 (including Lancaster County), which is 38% lower than the state's median of \$172,700. Where land values are higher, the housing values follow suit. For example, the cost of housing increases as you approach Lincoln and Omaha. In counties where the cost of agricultural land is high, such as York and Seward counties, so too are the housing values. Many of the municipalities in the SENDD 16-county service area are not in close proximity to a hub city and suffer a lack of available quality housing, which may drive the difference in

median home values.

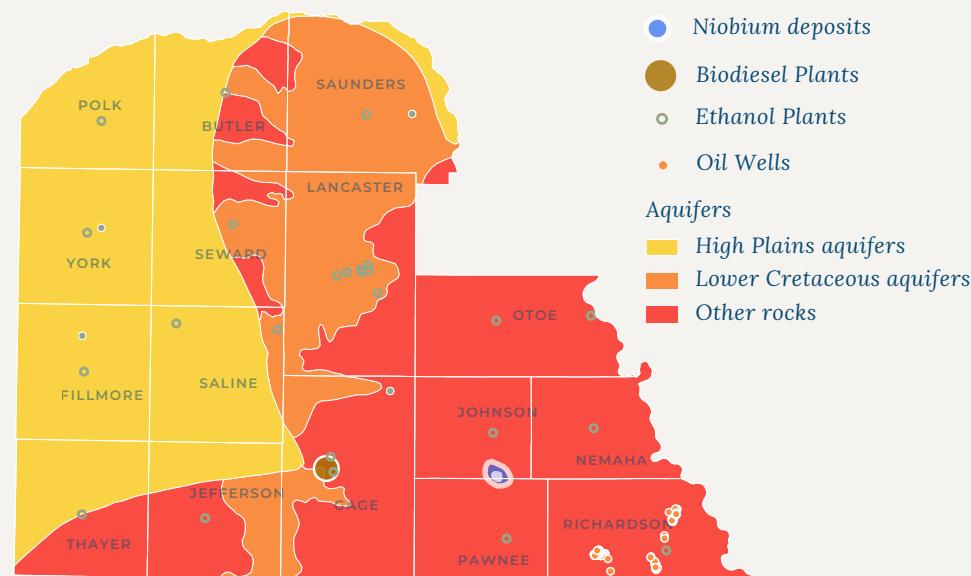
Homebuyers and renters have different needs, which creates questions that community leaders must consider when planning for housing. Local workforce and young professionals are usually in the market for a starter home; one that is modest and in relatively good order at a low to moderate income price. Housing for the elderly will also become very important, so retirement communities, town-homes, and assisted living communities should be developed for communities who want to keep their aging population comfortable. Because there is a general lack of affordable workforce housing and rental units are limited in many municipalities across the SENDD region, most workforce group make longer commutes to their jobs.

Major housing limitations identified within the SENDD region include: high costs for both rental and purchase, lack of quality rental units, aged housing stock, high costs of development, and limited opportunities (i.e. lot prices and infrastructure development, constraints on land suitable for residential development). Another consideration for workforce housing is developers tend to focus on large lot units that sell for \$300,000 and higher. This market is considered safer for developers and typically results in higher profits. Several housing studies indicate

TRANSPORTATION



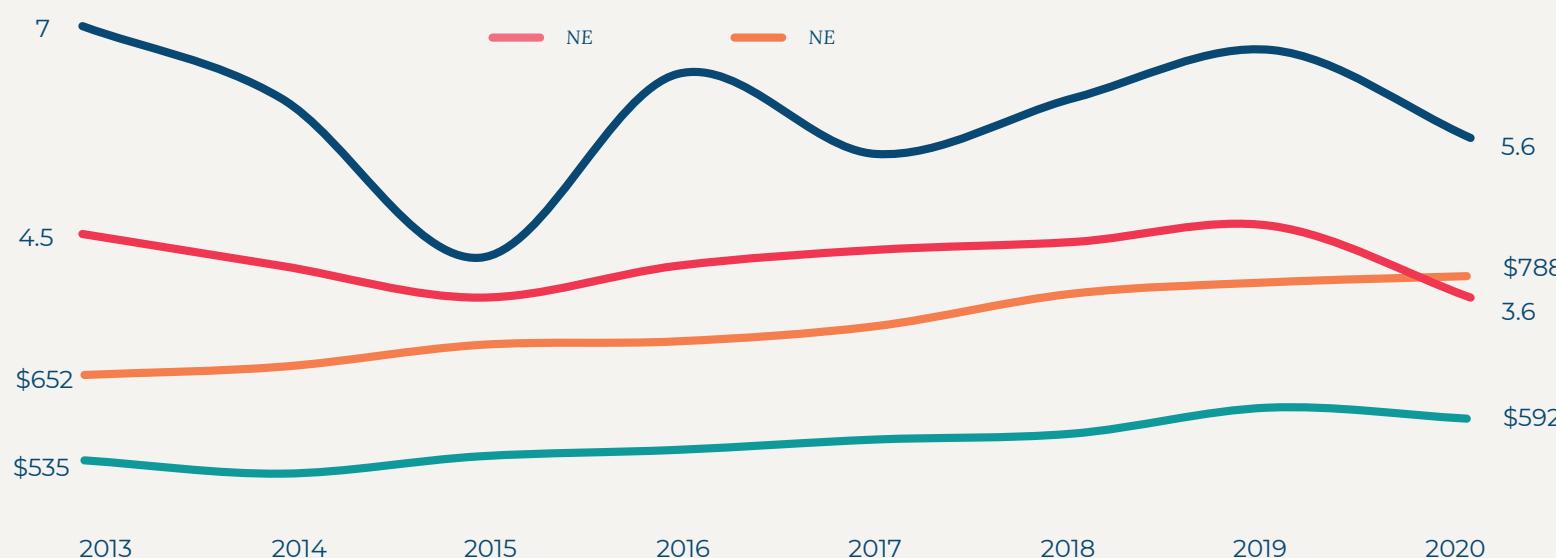
AQUIFERS, ENERGY, MINERALS



Source: NGPC, ESRI 2021

Vacancy Rate

Average Rent

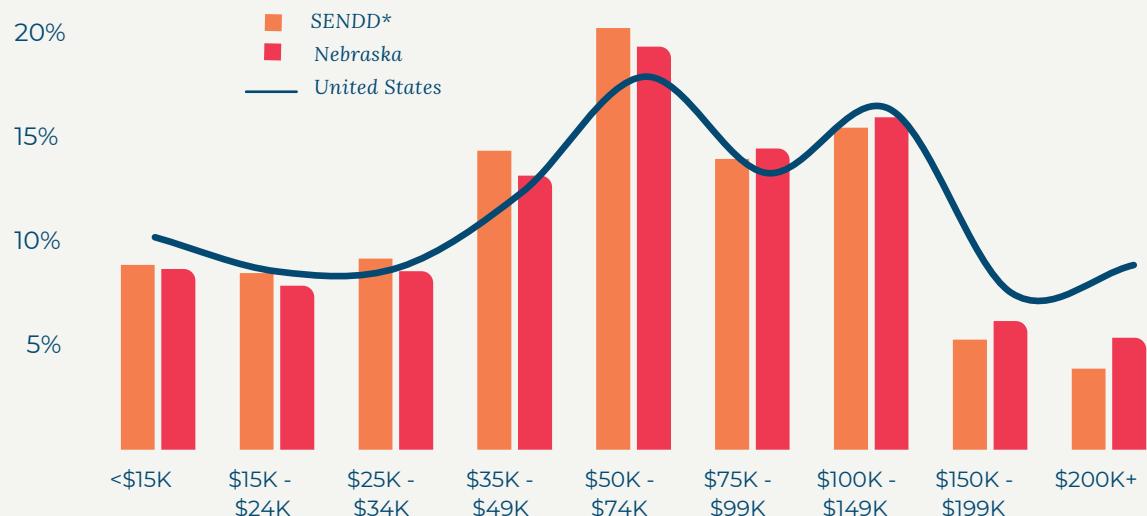


HOUSING

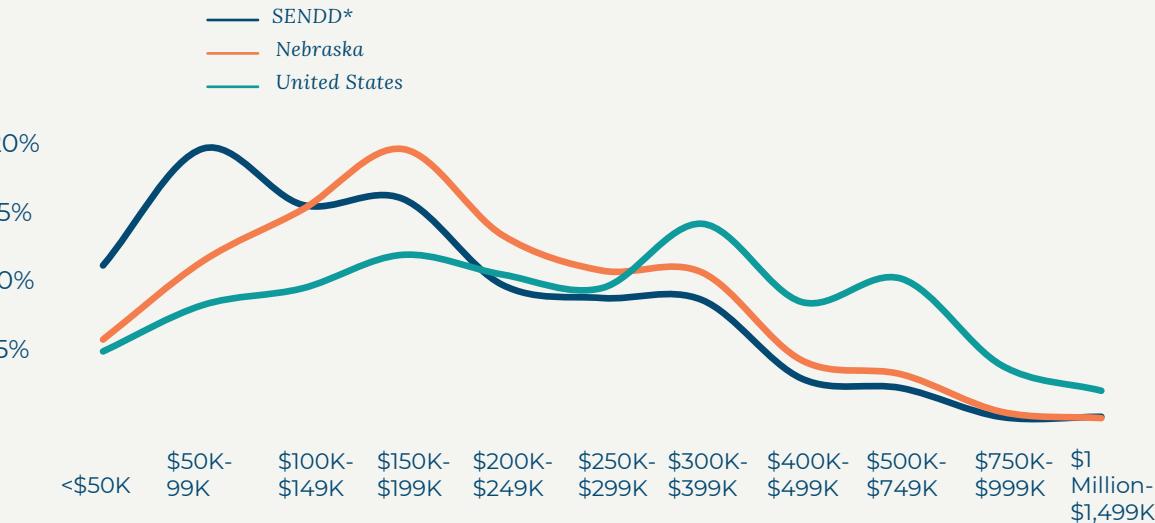
In spite of growing wages and low unemployment, the number of housing units increased. Despite the growth in available units, the number of occupied units dropped. This could signify an issue with the housing inventory rather than the population moving into the Lincoln Metropolitan Statistical Area (MSA).

Source: 2021 NIFA Stats

2021 HOUSEHOLDS BY INCOME



2021 HOUSING VALUE



Source: ESRI 2021 Forecasts, ACS 5 year estimates

* Does not include Lancaster County data

the ideal entry level housing market is \$150,000 to \$180,000.

New, single-family housing development has fluctuated within the SENDD region over a ten-year period spanning 2009 to 2019. The average number of new homes constructed in southeast Nebraska during this time is approximately 360 new units per year, excluding Lancaster County. These newer homes have an average value of \$209,026, which exceeds the price range that was identified as most affordable for first-time, workforce homebuyers.

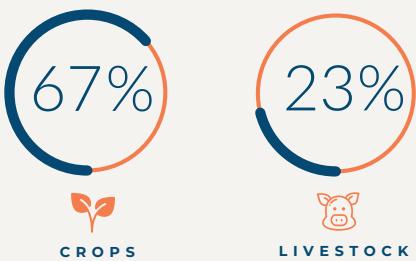
INDUSTRY PROFILE

SENDD's economy is largely Ag-dependent. Small businesses are the most common type of business in the region. Additional resources, such as more opportunities, and larger skilled workforce could support entrepreneurs' ability to work and live in the region. Some major industries in the region are highlighted in the following pages:



AGRICULTURE

5.6 Million acres in SENDD's region is devoted to agriculture, with a county average of 350,871 acres



The 2017 data also shows that since 2012, agricultural expenses increased throughout the region while income and net cash largely decreased. Government payments also increased during that time with the average farm receiving \$18,873. This may be an unsustainable model for agriculture. Commodity prices drive local economies, please see Economic Trends section for more information

Agriculture is the largest industry in Nebraska with approximately 25% of jobs related to agriculture. In 2019, farm marketings contributed over \$21.4 billion to Nebraska's economy. That same year, each dollar in agricultural exports generated \$1.28 in transportation, financing, warehousing, and production industries.²⁴

Both within SENDD's region and statewide, the number of farms decreased while the average farm size increased as larger farming operations continued to buy out and consolidate land from smaller farms. From 2016 to 2019, the average size of an operation increased by 10%.²⁵

The 2017 US Department of Agriculture (USDA) Census of Agriculture shows SENDD's counties align with the trends seen statewide. Farms decreased while the average size increased and operations with over \$100,000 in sales now make up 38% of farms in the region falling in this category. The exception is Lancaster County, which has seen smaller farms survive. Farms with sales under \$2,500 (often called micro-farms) account for 42% of the farms in Lancaster.²⁶

According to the 2021 cattle inventory report, the counties average over 33,000 cattle

and calves with a total over 540,000 for the entire region. In 2020, the county average for bushels per acre was 183 for corn and 55.7 for soybeans, the two most common crops in the region. Fillmore and Gage also reported an average of 111 bushels per acre of sorghum. Gage, Pawnee, Saline, and Saunders produced an average of 57.7 bushels per acre of oats.²⁷

As of 2017, over 19,000 people were involved in farm production in the region with males making up 69% of the workforce. The majority of these people identified as white, non-Hispanic or Latina/o/x. Additionally, 4,180 indicated they were new or beginning farmers.²⁸ This indicates that the agricultural sector is still important for the region and new people continue to enter the industry, however there is little racial and ethnic diversity among producers.

The agricultural industry in the region and state also fuels agritourism as well as farm-to-table production. Production at places like Kimmel Orchard and Vineyard in Nebraska City provides visitors with opportunities to enjoy the products made from the locally grown produce.

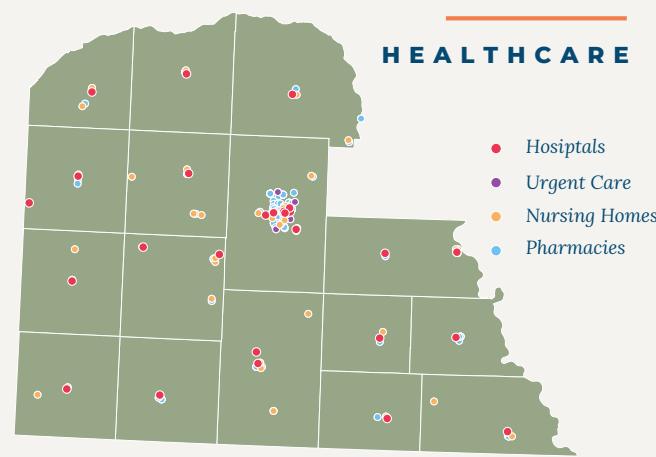
24 Nebraska Agriculture Fact Card

25 USDA's National Agricultural Statistics Service Nebraska Field Office

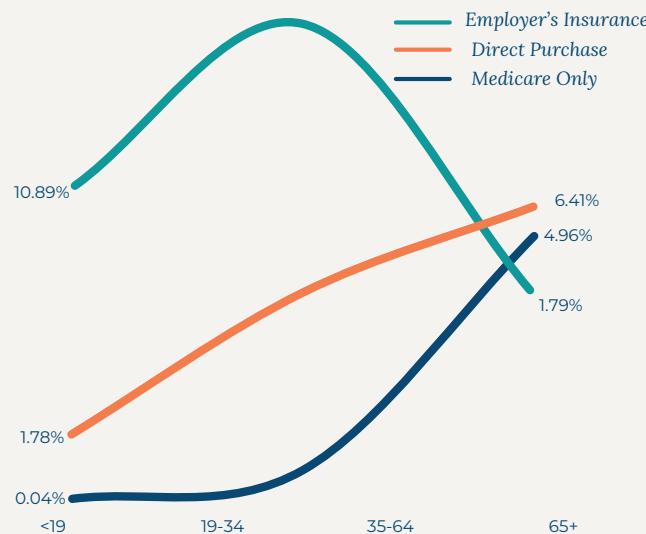
26 2017 State and County Profiles - Nebraska

27 USDA's National Agricultural Statistics Service Nebraska Field Office

28 2017 State and County Profiles - Nebraska



2015-2019 HEALTH INSURANCE BY AGE



Access to a quality, affordable healthcare system is essential in maintaining a good quality of life in southeast Nebraska. Additionally, the health of a population is a major factor in its resilience capacity.

As shown on the Healthcare map, SENDD's region is home to numerous hospitals, urgent cares, nursing homes, and pharmacies. According to the Department of Health and Human Services (DHHS), southeast Nebraska is home to 27 hospitals, where at least one hospital is located within SENDD's 16 counties. Lancaster, Saline, and York county are the only three counties who have two or more hospitals located within their county. This is uncommon for rural areas and often unheard of in some of Nebraska's surrounding states. The proximity to the Lincoln and Omaha MSAs creates more opportunities for individuals seeking specialized care.

SEND's region includes five public health districts, including Southeast District Health Department, Three Rivers Public Health Department, Lancaster Public Health Department, Public Health Solutions District Health Department, and Four Corners Health Department. The region's public health departments continue to be crucial, providing resources to assist residents and other neighboring counties who continue to navigate the COVID-19 pandemic.

Southeast Nebraska has several agencies who are working to address the needs of the region's aging population. Blue Rivers Area Agency on Aging is located in Beatrice and serves the counties of Gage, Johnson, Otoe, Nemaha, Richardson, Pawnee, Jefferson, and Thayer. Aging Partners located in Lincoln serves Lancaster, Saunders, Polk, Seward, York, Fillmore, and Saline counties.

On the national level, discussion regarding cuts to national programs, such as Medicaid²⁹ and Medicare, are occurring. If enacted, this may affect individuals residing in assisted living and nursing homes who rely on these programs. Aging services staff shared anecdotal stories that these facilities are closing down at an alarming rate; and for the ones that remain open, there is rapid staff turnover. This struggle is primarily due to workforce shortage, low pay, and national program reimbursement rates.

Aging agencies provide additional services such as Meals on Wheels and social programming for the elderly. Aging services staff notes that in larger communities, these services are offered by various providers rather than a centralized agency. These agencies provide the elderly with access to basic services such as transportation to the grocery store, medical appointments, and social interactions.



ARTS AND TOURISM

The Kregel Windmill Museum in Nebraska City is “a time capsule of early 20th Century shop-type manufacturing” while the Bartels Museum and Marxhausen Gallery in Seward covers both natural history with minerals and fossils as well as an art gallery promoting cultural experiences and is home to the Koenig Collection.

3,600 JOBS



The Johnson County Courthouse in Tecumseh is the centerpiece of the community’s architecturally rich downtown historic square.

Arts & Culture

Within SENDD’s region, arts and culture continues to make an impact. Based on 2017 data from Americans for the Arts, the 16 SENDD counties supported 814 arts and culture related businesses producing over 3,600 jobs.³⁰ As an aside, this figure does not include the many volunteers across the region that work tirelessly to expand the arts and culture opportunities available in their areas. As part of these figures, the region also supports seven arts councils outside of Lincoln. Butler and Pawnee counties support their own arts councils while Ashland, Beatrice, Brownville, Geneva, Hickman, and Seward have city-based councils.

Most of the region is also served by county-wide historical societies and museums charged with preserving local history and other topics. This includes places like the John P. Falter Museum, which contains a vast collection of Falter’s work. Falter was a contemporary to Norman Rockwell and, produced nearly 130 covers for the Saturday Evening Post.

Tourism & Hospitality

Most of SENDD’s region is served by the Southeast Nebraska Tourism Council, which helps to promote tourism to the area. There are additional statewide organizations such as Nebraska Tourism and Nebraska Travel Association as well as lodging, culinary, and event associations to help cover the industry at large.³¹

SEND is continuing to work with area communities and organizations to ensure they are aware of the opportunities and assist where needed.

More than 1,000 Nebraska properties are listed in the National Register of Historic Places and 313 properties are in the SENDD area. These represent some of the areas’ most significant examples of architecture, as well as historical events and persons. Some are used as museums or include historical interpretation, making them attractive to the heritage tourist. Historic districts can provide the backdrop for special events. Publicly owned buildings, such as courthouses, can draw tourists, and businesses housed in historical places can offer exotic places to stay or shop.³²

30 Americans for the Arts. Creative Industries Reports for Nebraska. 2017

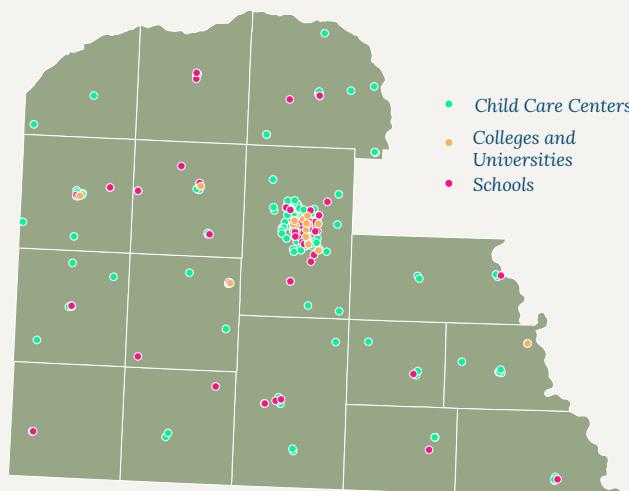
31 Industry Resources. Nebraska Tourism Commission.

32 Heritage Tourism In Nebraska, 2011



EDUCATION

22 of the 46 public school districts are consolidated which accounts for 47.8% of the region. During the 2019-2020 school year, the total preschool through grade 12 enrollment approached 32,000 students



Education is critical to the economic vitality of southeast Nebraska. Schools serve an important role in preparing students for the future workforce. Partly, the success of businesses within the region is based on the availability of a well-trained workforce that is prepared to meet the demands of an ever-changing world.

School districts known for providing a quality education experience can impact the number of people who choose to live in a community. If a community loses its school site due to consolidation or other perceived defects, it may become less attractive to potential residents who are looking to relocate. Often, these community members recognize this strength, and their school facilities display this pride with favorable bond elections, new amenities, and technologies.

Southeast Nebraska's public schools and colleges offer several programs and opportunities to area students that help prepare them for a changing workforce, providing them employment opportunities that help shape their futures. An example of this is through Southeast Community College, who partners with 47 school districts within Educational Service Units (2, 3, 4, 5, and 6) to offer students the opportunity to enroll in the Southeast Nebraska Career Academy Partnership (SENCAP), which offers several skilled academies.²³ This program is designed

for students to participate in SENCAP for two years with the intention of students earning college credit and preparing them for their future careers.

There are 46 public school districts in the SENDD region as well as multiple institutions of higher learning, including Southeast Community College, University of Nebraska at Lincoln, Nebraska Wesleyan, Kaplan University, Peru State College, Concordia University, Doane College, and York College. Between these colleges, they offer different levels of degrees to area students. In addition to the colleges mentioned, the region is located in close proximity to other major universities including, but not limited to, University of Nebraska at Omaha, University of Nebraska at Kearney, and Creighton University.

Education itself is a major employer in the SENDD region with 5,526 jobs in the Education sector. This sector accounts for 10% of the total jobs in the region behind manufacturing (16%), agriculture (14%), and healthcare and social assistance (13%). However, the outlook for careers in the education sector may not be promising with the sector projected to add only 160 positions by 2028, which translates to 10 jobs per county.

ECONOMIC TRENDS & WORKFORCE DEVELOPMENT

Economic Conditions

Many factors including affordable housing, broadband availability, infrastructure, education, access to healthcare as well as others combine to make a sturdy economy, and SENDD's regional economy has remained strong since the 2018-2023 CEDS was completed. This has occurred in spite of a global pandemic, the 2019 flooding events, fluctuating agriculture commodity prices, trade wars, and workforce issues.

Beginning with unemployment rates, overall SENDD's region has endured the many aforementioned setbacks relatively well. The U.S. Bureau of Labor Statistics (BLS) reports the April 2021 unemployment rate for the 16-county area was 2.2%, compared to the national average of 5.7%. This is a continuation of the region's ongoing low unemployment rate when compared to nearby states of Iowa, Kansas, and Missouri. Since 2015, SENDD's service area's unemployment rate has remained at or below Nebraska's average and the three nearby state's. The exception was in 2020 as the pandemic was at its peak.

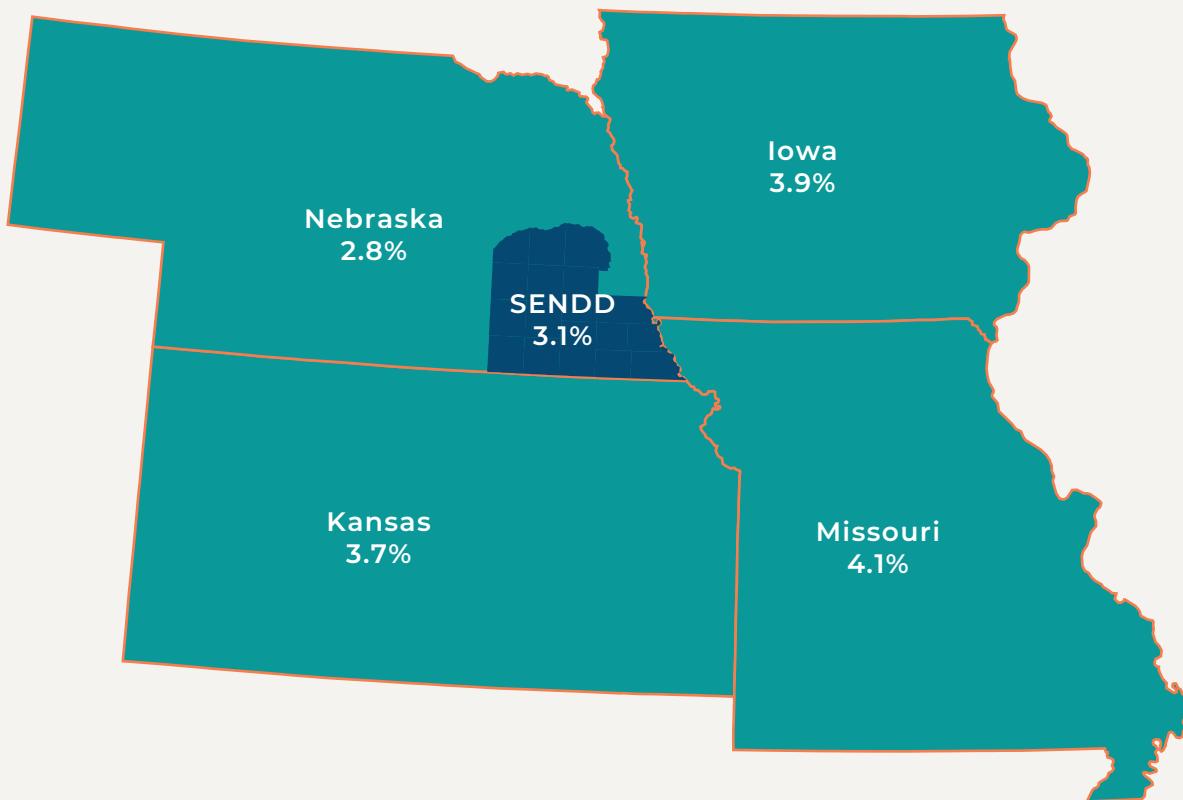
Reasons as to why the region is able to perform well might include the number of large employers within SENDD's service area, which the Internal Revenue Service (IRS) identifies as a business with 50 or more workers. While a handful of these are national companies, several others are locally-owned. Locally-owned companies help strengthen a community's economy by creating pride within the community while increasing the tax base. It also strengthens the economy by allowing decisions to be made within the area which helps keep profits local, and owners are less likely to relocate. While the number of area-owned businesses might be one explanation for the region's resiliency, other possible reasons include proximity to the state's two metro areas (Lincoln and Omaha), the size of the labor force, availability of jobs, and workforce mentality.

Another potential reason for the region's sustained economic condition is the recent resurgence of agriculture commodity prices. The USDA's National Agricultural Statistics Service (NASS) provides a monthly market report detailing prices producers receive from the sale of various products (livestock, grain, fruit, etc). Individuals can review these reports to identify trends in agricultural markets. According to the July 30, 2021 NASS Commodities Report, food grain (wheat, oats,

barley) prices increased 28% since June 2020. Similarly, feed grain improved 88% over the same period. In general, all commodities relevant to southeast Nebraska (livestock and food and feed grain) have increased substantially over the past three years. One example is the price of corn, which grew from \$3.43 a bushel in June 2018 to \$6.02 a bushel in June 2021. Higher prices generally means producers can purchase larger ticket items, such as new farm machinery or capital improvements (sheds, grain bins, etc.) that support local dealerships and the area economy.

Anecdotally, the region's service and retail sectors continue to perform well. SENDD routinely communicates with area Economic Development Organizations (EDO) as well as city and county officials in regards to their local economy and sales tax revenue. Sales tax is key for local governments to provide amenities, improve infrastructure, and offset the burden of other taxes. Communities with healthy sales tax proceeds tend to offer a higher quality of life and benefits. This past year, Nebraska's tax collection surpassed projections by 19.2%. While there is no direct correlation between SENDD's region and the state as a whole, it can be intimated that the programs and services that generate these taxes performed well. This increase may also

2021 AVERAGE UNEMPLOYMENT COMPARISON



2021 EMPLOYMENT

11% 23% 67%



SERVICES



BLUE COLLAR



WHITE COLLAR

2021 ANNUAL LIFESTYLE SPENDING

\$2,034 \$63



TRAVEL



MOVIES/PARKS

\$53



THEATRE/OPERA

\$49



SPORTS/EVENTS

2021 LIFESTYLE SPENDING INDEX

93 93 91

RETAIL GOODS

ENTERTAINMENT

HOME SERVICES

89 88

APPAREL AND SERVICES

MEALS AT RESTAURANTS

have less connection to local purchases and more with online sales, which surged 18% during the pandemic: the State began taxing online purchases in January 2019.

Population & Workforce

Access to good paying jobs helps drive the workforce. Concurrently, a quality workforce can build a foundation for high-paying and stable employment opportunities. The Aspen Institute published "To Build Back Better, Job Quality Is the Key" in April 2021, which elaborates on this framework - good-quality jobs (pay, schedule, benefits, working conditions) improves standard of living and local wealth. While southeast Nebraska employers tend to pay higher wages (see Demographic and Socioeconomic Profile) than contiguous states, the demand for workforce will require them to continue making strides to maintain this advantage. This will be further amplified as SENDD's service region struggles to maintain population coupled with an aging workforce moving towards retirement.

As reported in SENDD's 2018-2023 CEDS, the Center for Public Affairs Research (CPAR) at the University of Nebraska-Omaha (UNO) projects the area's population decline will continue as more residents migrate to Lancaster County and the Omaha Metropolitan Statistical Areas (MSA). Currently,

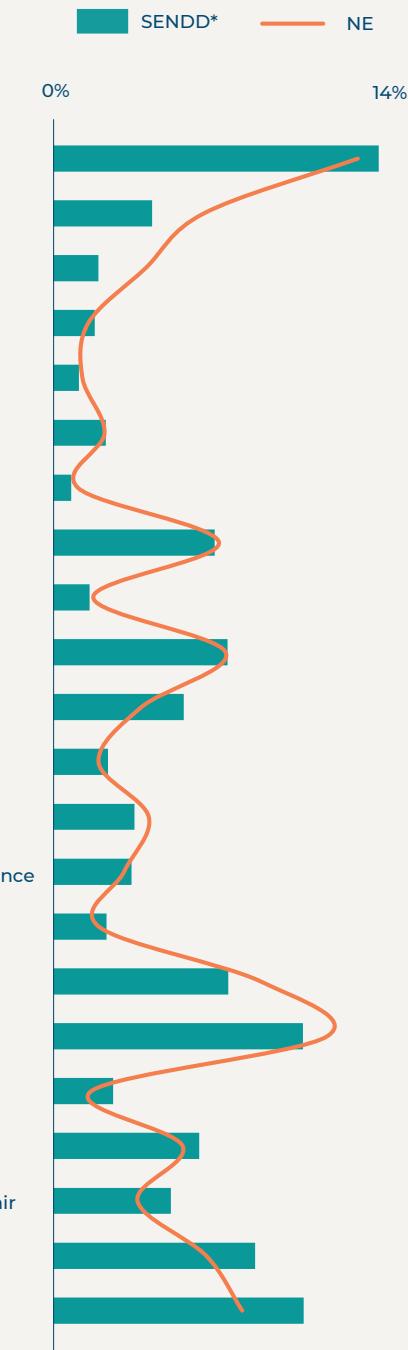
the region's seniors represent 21.6% of the total population. This is an increase of 2.3% since 2015. Statewide seniors represent 1.64% of the population. CPAR suggests that if migration continues to occur as it did in the 2000s, and applying projected death rates, this percentage could increase to over 30% by 2035 (vs. a projected 20.8% in the state).

Continuing from the 2018-2023 CEDS, three demographic data points noted by the CPAR raise concern:

Continued loss of overall population. CPAR forecasts the region's population will be 150,665 by 2050, which is 25,194 (-14.3%) less than 2017.

A smaller percent of residents 20 to 34 years of age living in the area. CPAR anticipates this figure to drop 8% (27,842) by 2050. This age band typically represents a vital part of the workforce, and when many individuals start families. (This is noted in the Demographic and Socioeconomic Profile as well.)

Expected rapid increase of residents 65-years and older, CPAR suggests that by 2050, 45,828 of the 150,665 (30.4%) population living in the 16 counties (minus Lincoln) will be over 65 years old.



Jerry Deichart from CPAR notes, "A demographic shift over the next few decades could mean a surge of retirees relying on public services and sluggish growth in the number of workers who drive the economy and generate tax revenue..." From an economic development standpoint, this is critical in that it may be difficult to attract large employers into the region due to workforce issues.

Beyond the question of how an aging population impacts the workforce, author Adam Ozimek writes, "(O)lder populations mean less entrepreneurship... lower labor force participation and a higher dependency ratio." Ozimek adds, "An aging population influences the local economy through decreased consumer spending, lower incomes, and can lead to less innovation."

As previously mentioned, the SENDD region is uniquely located in regards to Lincoln, Omaha, and three nearby states (Iowa, Missouri, and Kansas). While long commutes are not unusual in rural America, for example, Reinke Pivot Manufacturing's employees travel from over 40 zip codes, this proximity creates commuting patterns that other parts of the state may not see. This commute may be a solution to workforce issues, but it is not likely a long-term fix; particularly as employers transition to remote work options.

Surprisingly, unless the CEDS Survey question related directly to transportation, road improvements routinely received low support. This was usually at the expense of strengthening Broadband or Housing.

In 2018, the State of Nebraska with various partners launched the Blueprint Nebraska initiative to map out a 10-year vision for the state's economy. Much of what is included in SENDD's CEDS is reflected in the report, including housing, workforce, increased wages, and improving the quality of life. For the full copy of Blueprint Nebraska please go to www.blueprint-nebraska.org.

Overall, the region's economy seems strong and continues to perform well. The areas of concern include population, workforce, and agricultural markets. SENDD will continue to work towards addressing these issues through activities such as WealthWorks, and other nationally-proven programs.

6,973



HOUSEHOLDS
BELOW
POVERTY
LEVEL

17,522



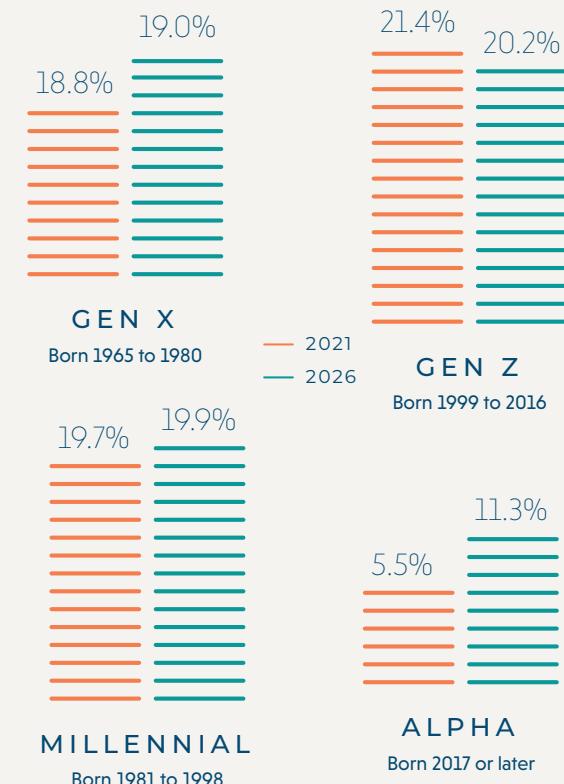
HOUSEHOLDS
WITH
DISABILITY

4,728



HOUSEHOLDS
RECEIVING
FOOD STAMPS

PROJECTED ANNUAL POPULATION GROWTH



80

WEALTH
INDEX

The index represents the wealth of the area relative to the national level. Values exceeding 100 represent above-average wealth

25

DIVERSITY
INDEX

Diversity Index summarizes racial and ethnic diversity. It ranges from 0 (no diversity) to 100 (complete diversity)

11%

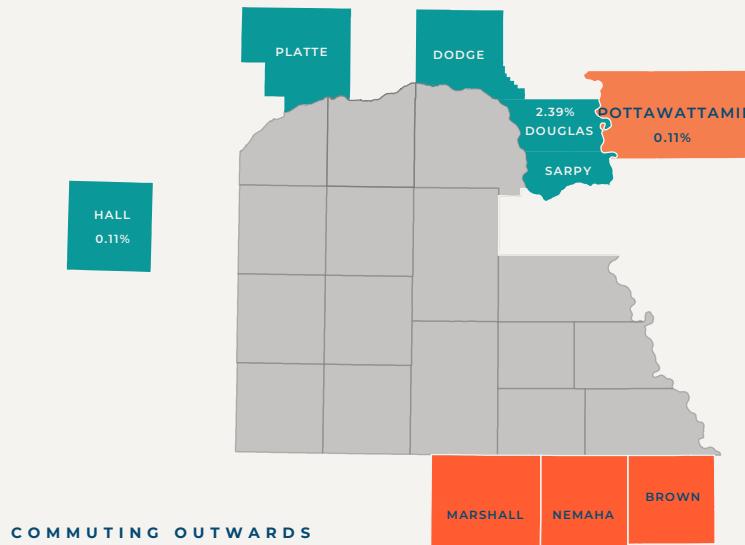
POVERTY
STATUS

Population for whom poverty status is determined is 150,509. 11% of households in the region are below the Poverty Level.

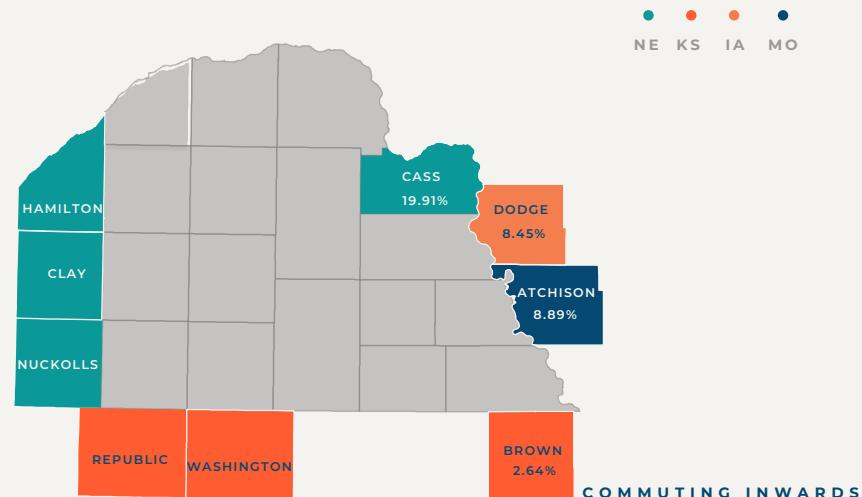
Source: 2021 ESRI Index, ESRI, Bureau of Labour Statistics. The vintage of the data is 2021, 2026. Data is for SENDD region minus Lancaster County.

COMMUTING PATTERN

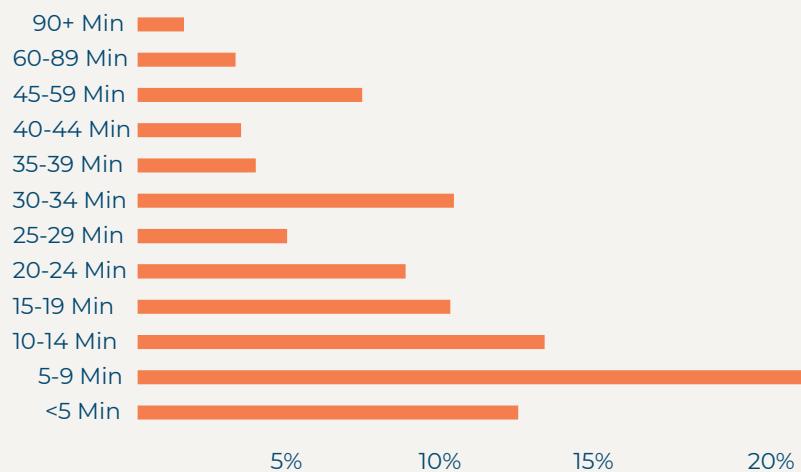
According to the region's 2015 commuting pattern report from U.S. Census Bureau's American Community Survey, 6.6% of the workforce population lives in the area but commutes out of the region for work, whereas 5.8% of the workforce population works in but reside outside the region. Douglas County has the largest proportion of SENDD residents commuting there. Cass County has the most significant percentage of residents that commute to work in the SENDD area.



Source: 2021
StatAmerica
2021 ESRI Forecast
Data
U.S. Census Bureau
2015-2019 ACS Data,
Business Counts
from Data Axe



Commute Time



81%



DRIVE ALONE TO WORK

0.2%



BIKE TO WORK

3.8%



WALK TO WORK

0.1%



PUBLIC
TRANSPORTATION TO
WORK

3

Strategic
Direction, Goals,
and Objectives





STRATEGIC DIRECTION, GOALS, AND OBJECTIVES

Where do
we want to
be in 2030?

Protecting the natural, built, and community assets that make this area unique is an essential step toward economic development. SENDD completed the CEDS process to continue creating a path forward that recognizes the region's character, industries, and natural environment. It also serves as a tool for identifying strategies to address its challenges, while ensuring economic resiliency.

The Vision, Goals, and Priorities are the foundation for the CEDS Action plan.

ECONOMIC VISION FOR SOUTHEAST NEBRASKA

The long-term economic Vision developed by SENDD staff and adopted by the Strategy Committee is based on the economic development principles articulated in the previous CEDS and the principles of sustainability; today's opportunities shall not undermine tomorrow's opportunities.

DEVELOPMENT OF REGIONAL OBJECTIVES

The second CEDS stakeholder workshop with the strategy committee, as well as responses from the survey, were used to determine

ECONOMIC VISION FOR SENDD

Increase regional growth and, resilience that enhances our natural, built, and, community systems throughout the southeast Nebraska region.

regional priorities/initiatives. Committee members utilized the SWOT analysis to identify priorities by targeting the region's strengths and opportunities while also addressing its weaknesses and threats.

The committee was split into two focus groups: Connectivity/Resilience and Equitable Growth. This provided the basis for the committee members to easily engage with each other and brainstorm on SWOT factors.

Swot Analysis and Identification of Regional Priorities

Committee members presented their conclusions from the SWOT analysis, and important regional priorities were identified [See Appendix 3 for SWOT meeting notes]. Staff from SENDD met to help condense and rank the priorities so as to ensure that they were inclined with some statewide future plans.



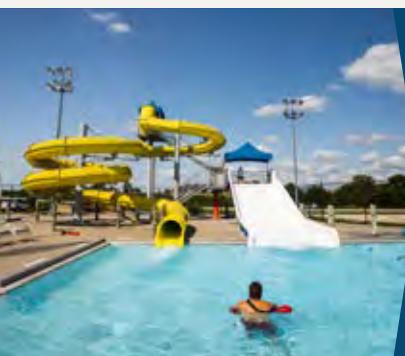
SWOT ANALYSIS

The Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis from the second CEDS focus group workshop is summarized in this table.

Strengths	Weaknesses	Opportunities	Threats
Strong programs for housing OORs and for community development (public works and downtown revitalization)	Neglect of housing programs at county level	Stronger communication with Education Service Units (ESU) to promote workforce development and include younger workforce in BRE opportunities	Aging population and workforce
Presence of NIFA resources	Slow population growth or difficulty recruiting workforce and qualified leadership	Education to employers and engagement as the “first line” of interaction with potential workforce about housing incentives and BRE initiatives	Loss of younger populations to larger cities/other areas of the Mid-west
Elected officials are deeply connected to their towns or cities	Aging infrastructure (i.e. bridges, streets, water treatment plants, etc.)	Education/outreach to county commissioners about the importance of BRE, housing, and workforce initiatives as regional human infrastructure	Real and perceived lack of diversity and/or inclusivity
Successful residential Tax Increment Financing (TIF)	Access to funding	Increase number of internships and apprenticeships with local employers	Wages and lack of sufficient benefits for employees (rigid/inflexible hiring practices)
Generational wealth and generational health	Fluctuating utility costs	Extending highways to larger corridors (interstates, larger communities, out of state)	Pandemic
Economic developers in the region are very engaged	Lodging (lack of hotels throughout the region to complement tourist attractions)	Subsidizing costs of rising utility prices (incentives to keep costs affordable)	Income limits to access federal and state
Good hospitals and healthcare	Lack of direct collaboration between local EDO agencies and CVB agencies	Strengthening partnerships between local EDO's and CVB's	Funding for infrastructure and disaster relief
Southeast Nebraskan's passion and dedication to their community		Identify additional sites for wind and solar farms	
Connecting roads			
Communities' response to disasters			
Partnerships with state and regional utility companies			

C E D S G O A L S

The CEDS Goals contribute to the region's economic Vision. The CEDS goals are also in line with the EDA Guidelines, and they have been designed based on regional needs and stakeholder input. The goals are largely developed by SENDD Staff and are in alignment with the goals established in the previous CEDS.



Built Systems



Community Systems



Natural Systems

GOAL: CAPITAL FACILITIES AND INFRASTRUCTURE

To expand dependable, resilient, and efficient infrastructure that is easily accessible, equitably distributed, and meets regional needs such as cleaner energy, waste reduction, clean air and water, broadband networks, and multi-modal transportation.

GOAL: BUILT RESOURCES

To preserve and enhance the distinct character of the region's built environment, including traditional development patterns, and cultural and historical resources.

GOAL: REGIONAL COLLABORATION AND COMMITMENT

To create a platform for local and regional organizations to devise and implement economic development policies and projects while promoting economic resiliency.

GOAL: ECONOMY AND HOUSING

To promote a sustainable regional economy comprising a broad range of businesses, diverse employment opportunities, improved education standards, and an adequate supply of ownership and rental housing that is safe, healthy, and attainable for people with various needs and income levels.

GOAL: NATURAL RESOURCES

To conserve, preserve, protect, and restore the region's natural resources, including drinking water, surface, and groundwater, wetlands, plant and animal habitats, agricultural resources, and recreational resources.



Increase regional growth and, resilience that enhances our natural, built, and community systems throughout the southeast Nebraska region.

The CEDS stakeholders and public input resolved on five goals that will drive the region to a more resilient economy.

The priorities were primarily informed by the CEDS Stakeholder and input from members of the public. A total of six priorities were identified for the 2021-2025 CEDS.

An action plan that outlines a framework for the addressing priorities utilizing Specific, Measurable, Attainable, Reachable, and Timely (SMART) strategies.

P R I O R I T I E S

- | | |
|--|----------------------------------|
| | Local Business |
| | Infrastructure Development |
| | Housing Access and Affordability |
| | Regional Engagement |
| | Quality of Life Enhancement |
| | Disaster Planning and Resilience |

C E D S G O A L A N D S U P P O R T I N G P R I O R I T I E S

The regional priorities directly address and support the five CEDS goals.

Built Systems	Community Systems	Natural Systems
GOAL: CAPITAL FACILITIES AND INFRASTRUCTURE Supporting Priorities a. Infrastructure Development b. Disaster Planning and Resilience	GOAL: REGIONAL COLLABORATION AND JOINT COMMITMENT Supporting Priorities a. Regional Engagement b. Quality of Life Enhancement	GOAL: NATURAL RESOURCES Supporting Priorities a. Quality of Life Enhancement b. Disaster Planning and Resilience
GOAL: BUILT RESOURCES Supporting Priorities a. Housing Access and Affordability b. Quality of Life Enhancement	GOAL: ECONOMY AND HOUSING Supporting Priorities a. Economy and Business Development b. Housing Access and Affordability	

REGIONAL PRIORITIES/ INITIATIVES

Local Economic and Business Development

Develop businesses and agriculture-based industries that directly address the region's problems.

Assist in lowering the cost of doing business in order to maintain a steady stream of locally owned firms and startups.

Identify potential financing gaps and replenish them with new revolving loan funds.

Assist in identifying job training programs and locating resources that will boost the workforce's overall growth.

Consider finance mechanisms to help businesses and entrepreneurs gain capital.

Housing Access and Affordability

Increase and diversify the types of rural workforce housing available throughout the region.

Determine changes in zoning restrictions that allow for more affordable housing.

Help identify housing needs and continue housing inspection to promote safe and healthy housing.

Regional Engagement

Identify and pursue opportunities for collaborations and regionalization.

Identify partnerships that would help address regional issues and propose solutions to area needs.

Adopt a fluid brand and marketing approach that enhances the region's image and serves as a tool for attracting people to work and live in SENDD's district.

Infrastructure Development

Identify and pursue grant opportunities or revenue streams that could help fund infrastructure development and improvements.

Contribute to educational programs aimed at developing and training a workforce capable of properly managing infrastructure resources.

Target and coordinate investment in infrastructure to allow for economic development.

Quality of Life Enhancement

Capitalize on the region's location to develop new businesses and employment opportunities that provide livable wages and help to address the region's challenges.

Establish collaboration and partnerships that assist in improving the region's natural and built systems.

Disaster Planning and Resilience

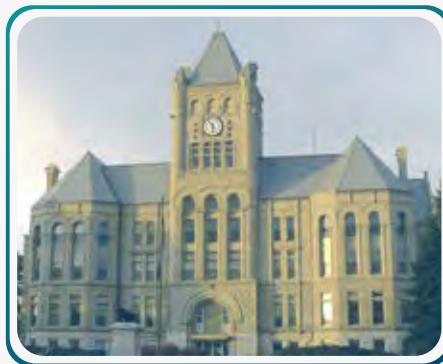
Support resiliency for multiple infrastructure types and the regional economy.

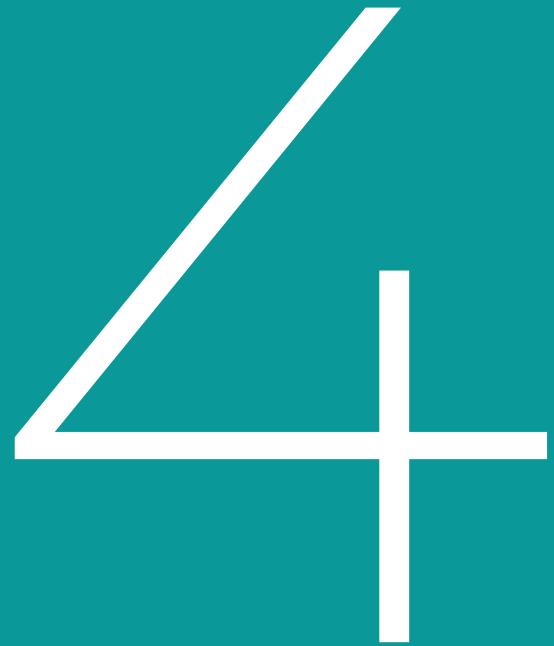
Cultivate regional methods for assessing and documenting vulnerable systems.

Maintain a resilience plan.

Encourage, promote and pursue funding opportunities that support sustainable and resilient development across the region.

Economic Resilience is the positive adaptability to disruptions and change with little long-term loss of function or potential for growth.³³





Action Plan and Evaluation Framework





ACTION PLAN AND EVALUATION FRAMEWORK

How do we
get there?

The CEDS serves as a guide for regional efforts focusing on objectives and strategies formulated through a combination of strategy meetings, SWOT analysis, and community outreach. Through public meetings and community outreach, the CEDS Strategy Committee and SENDD staff were able to determine two main elements to focus on through the next five years: Element One - Equitable Growth; Element Two - Connectivity/Resilience.

IDENTIFICATION OF OBJECTIVES

Within each of the two elements, three objectives/priorities were identified. Each

identified objective is designed to capitalize on the area's assets that will ensure growth within the region. The order of objectives are not indicative of importance as all contain important strategies. Each identified objective contains strategies and performance measures in addition to regional partners to ensure progress is being made on a regular basis.

Strategy Committee and SENDD staff chose to take a more targeted approach when creating the action plan and determining that each strategy is SMART (Specific, Measurable, Attainable, Realistic and Timely).

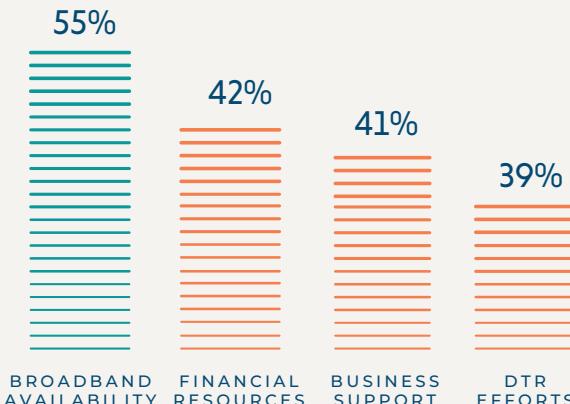


LOCAL BUSINESS



Survey Results

Important aspects of the business climate in southeast Nebraska to address



GOAL

Encourage and support business development and entrepreneurship

Continue to provide technical and loan assistance that spurs economic growth upon request

PARTNERS

Local Banks, Chambers of Commerce, Community Leaders and Stakeholders, Community/State Colleges, Economic Development Administration, Legislators, Local Businesses, Local Economic Development Organizations, Nebraska Business Development Center, Nebraska Department of Economic Development, Nebraska Economic Development Association, Nebraska Department of Labor, State Historic Preservation Office, SENDD, Universities, USDA-Rural Development

Provide technical assistance to communities interested in applying for Economic Development Certified Community (EDCC), Leadership Certified Community (LCC) and Certified Local Government (CLG) upon request

Survey key community stakeholders, lenders, and others annually to determine area market needs

Identify funding sources for workforce development and job training programs

Identify and distribute resources for ag-related industries upon request

STRATEGIES

Improve access to capital for new and existing businesses by identifying potential funding gaps and implementing new revolving loan funds to address those gaps

Partner with Nebraska Economic Developers Association (NEDA) to create an incentive webinar series that focuses on economic development financing (i.e. Tax Increment Financing, Infrastructure Stipends, Bonds, etc.)

PERFORMANCE MEASURES

Package and close three loans annually

Provide technical and loan assistance to twenty-five businesses annually and distribute a resource list to each business that includes both SENDD and resource partner information, including but limited

to gap financing, agriculture, workforce development, job training, grants, etc.

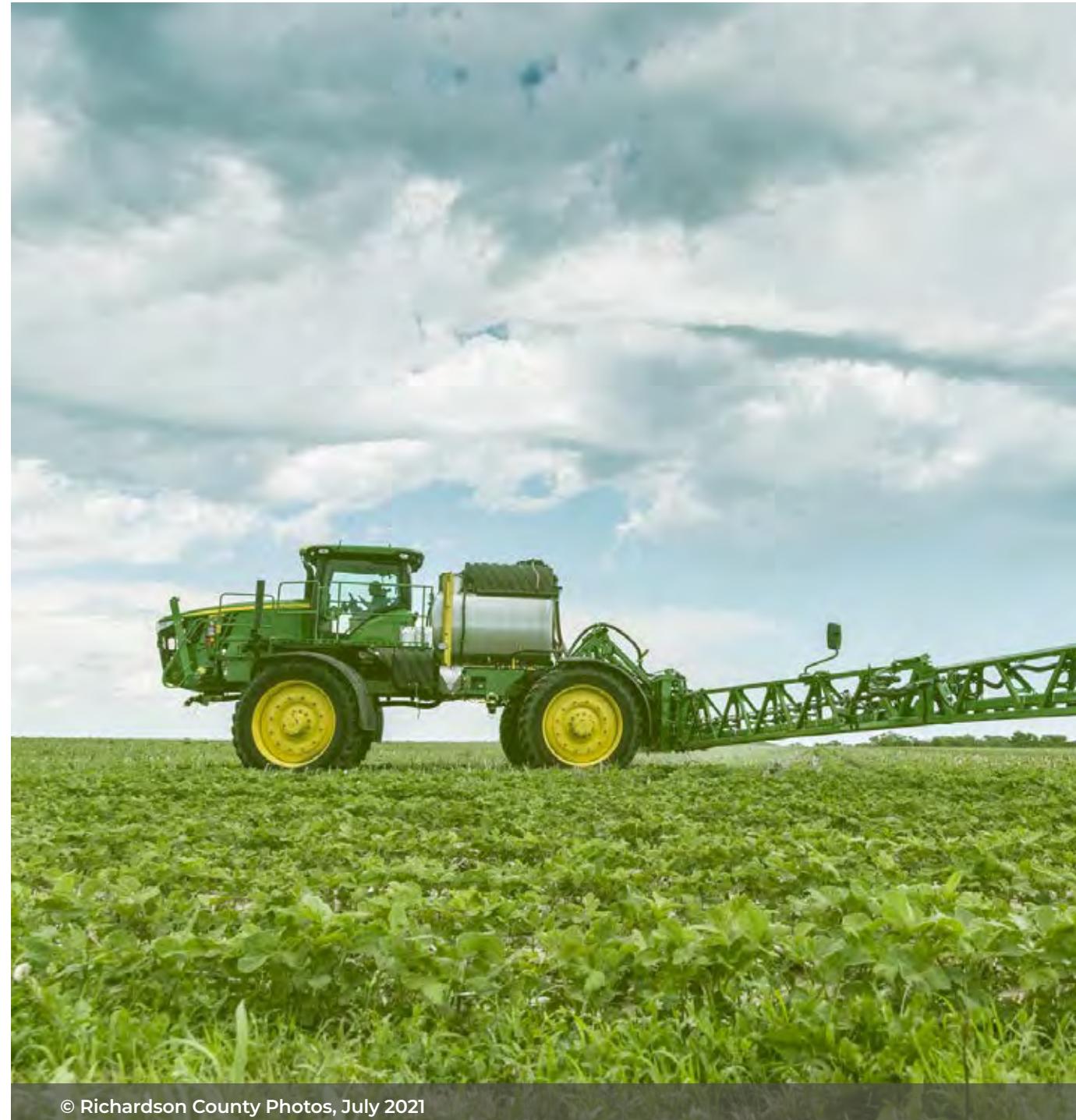
Generate and distribute an area market analysis to local stakeholders and lenders once a year (update every year to match market needs)

Promote Downtown Revitalization (DTR) opportunities twice a year and assist with at least one project annually

Provide technical assistance to at least three communities looking to expand their workforce development and job training initiatives

Provide technical assistance to at least one community annually who is interested in pursuing a Leadership Certified Community (LCC), Economic Development Certified Community (EDCC) or Certified Local Governments (CLG) certification

Distribute an incentive webinar once per quarter and work with at least five individual communities annually on utilizing their local incentives



© Richardson County Photos, July 2021



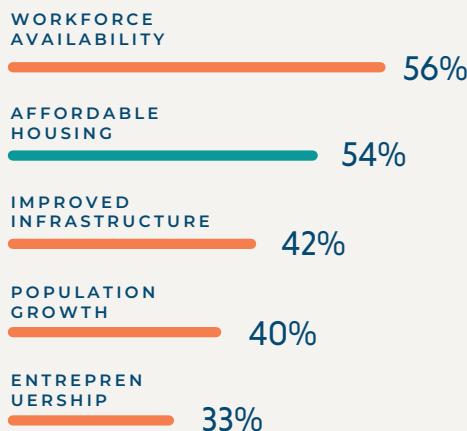
Geneva RWHF groundbreaking (2020)

HOUSING ACCESS & AFFORDABILITY



Survey Results

Important aspects of the general economy



GOAL

Increase the availability of safe, affordable, and quality housing within the region

PARTNERS

Area developers/sub-contractors, Nebraska Department of Economic Development, Blue Valley Community Action, Southeast Nebraska Community Action, Southeast Nebraska Affordable Housing Council, Local Municipalities and Counties, Southeast Nebraska Development, Inc., Regional Housing Organizations/Community Housing Development Organizations, Local Realtors, Local Residents

STRATEGIES

Work with local municipalities, developers and homeowners to implement housing programs such as down payment assistance, Owner Occupied Rehabilitation (OOR), Purchase Rehab Resale (PRR), second story housing, Community Development Block Grant (CDBG), etc.

Work with local developers and community stakeholders to identify housing needs within the region

Continue housing inspection services to promote safe and healthy housing

Expand the current Rural Workforce Housing Fund (RWHF) and continue to encourage/support workforce housing development within the region

Establish a Purchase/Rehab/Resale Program to preserve existing housing stock and encourage home rehabilitation

PERFORMANCE MEASURES

Conduct two to three meetings with area developers, sub-contractors, and community leaders for networking, identify housing needs, and project development

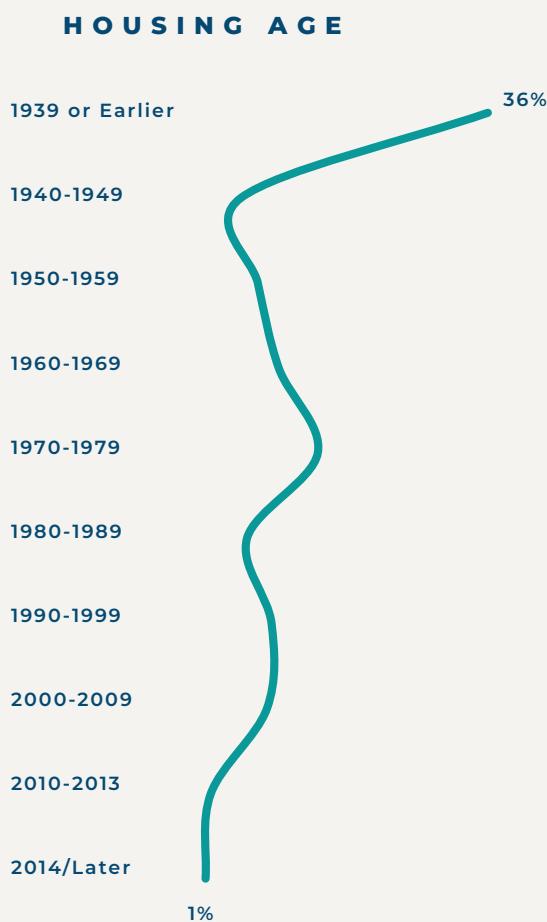
Complete twenty to twenty-five Special Services Contracts such as Blue Valley Community Action (BVCA) inspections, lead testing, building condition inspections, etc., annually

Complete forty grant funded projects annually (including but not limited to Down Payment Assistance (DPA), Nebraska Affordable Housing Trust Fund (NAHTF), Owner Occupied Rehabilitation (OOR))

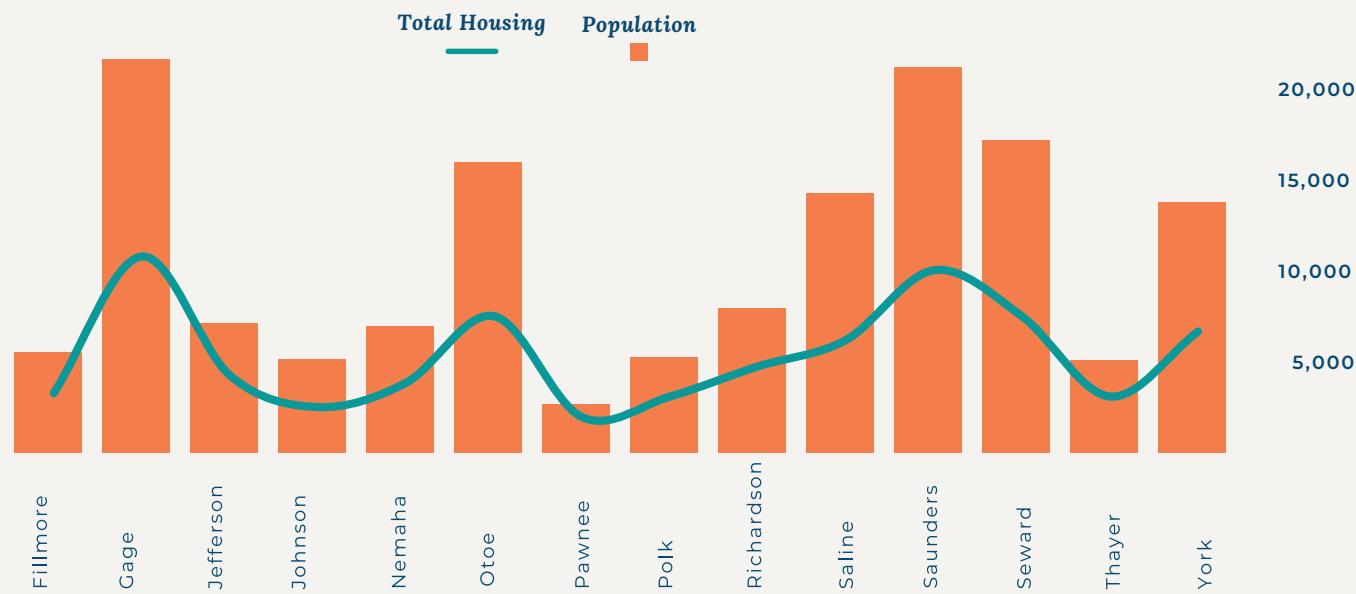
Complete two to four Purchase/Rehab/Resale projects annually

Close three to five Rural Workforce Housing Fund (RWHF) loans annually

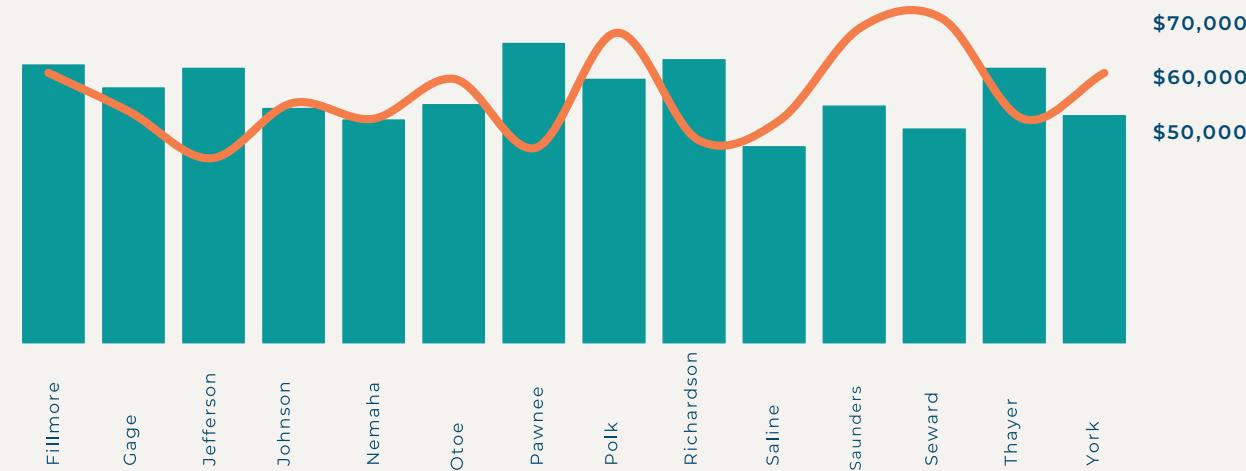
Host/sponsor at least one meeting annually with municipalities and county governments to identify and address concerns with their current zoning regulations and ordinance



TOTAL HOUSING STOCK AND POPULATION



MEDIAN AGE AND MEDIAN HOUSEHOLD INCOME





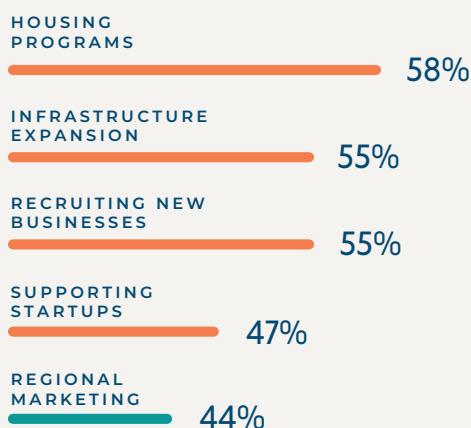
Syracuse DTR planning meeting

REGIONAL ENGAGEMENT



Survey Results

Which economic development priorities are most important for southeast Nebraska?



GOAL

Increase engagement with member and non-member communities through stronger communication and marketing

challenges and solutions related to economic development and housing

PARTNERS

Southeast Nebraska Development District, NEDA, NROC, Local Economic Development Organizations, Bilingual Organizations and Staff, Community Leaders, Nebraska Department of Economic Development, Local Municipalities

Continue to visit member or non-member communities to promote SENDD's services and encourage projects on an as requested basis

STRATEGIES

Create a brand and marketing guide to be consistent with our message to our member and non-member communities

Partner with Nebraska Regional Officials Council (NROC) and NEDA to create an economic development curriculum to share with local & county government agencies

Expand upon and improve SENDD's marketing efforts through social media pages, website, press materials, and newsletters

Increase accessibility to non-English speakers

Host an annual Southeast Resource Network (SERN) Summit to discuss regional

Host a bi-annual meeting consisting of local Economic Development Organizations to discuss current economic development trends, success stories, and needs

PERFORMANCE MEASURES

Internally publish a brand or marketing guide and maintain on an annual basis

Double reach of social media; post weekly social media posts, increase newsletter subscriptions by twenty people annually; integrate newsletter on our website allowing for others to subscribe

Translate all SENDD materials and distribute on our website and newsletter at least once per quarter

Distribute economic development curriculum through our newsletter bi-annually and make them readily available on our website

Visit member and non-member communities annually

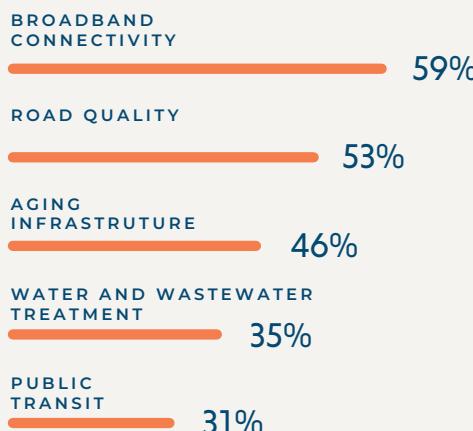


INFRASTRUCTURE DEVELOPMENT



Survey Results

Which aspects of the physical infrastructure are most important to address?



GOAL

Enhance and strengthen the region's infrastructure to ensure long-term sustainability and economic growth

PARTNERS

Nebraska Department of Transportation, Broadband Agencies, Internet Service Providers, NROC, Universities, NDED, Nebraska Association of Resource Districts, EDA, Federal Emergency Management Agency, Nebraska Emergency Management Agency, United States Army Corps of Engineers, USDA, Public Power Districts, Local Water/Utility Providers, Local Municipalities and County Officials, SENDD

STRATEGIES

Continue to provide grant administration support for street, road improvement, power plants, water/wastewater, bridges, and parks among other infrastructure projects

Identify and compile a funding resource directory for infrastructure projects

Support regional infrastructure projects

Write/administer grants to provide continued support for regional broadband capacity

Dedicate additional staff hours and new staff positions towards regional broadband capacity

Work with local water operator training providers to distribute outreach materials that educate communities and operators on resiliency, economic development, and disaster preparedness related to water infrastructure

Provide information to communities about local technical assistance opportunities for transportation assistance

PERFORMANCE MEASURES

Provide technical assistance to at least ten communities annually for grant and transportation assistance

Write and administer six infrastructure related grants annually such as public works, planning, broadband, transportation, water/wastewater

Review and analyze collected speed test data at least twice annually

Distribute infrastructure outreach materials to communities via newsletters and social media at least four times per year



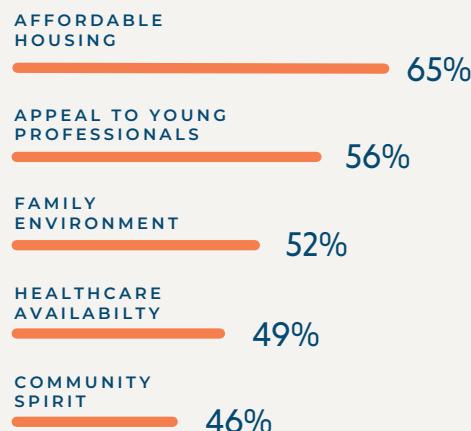
© Nemaha County Through The Lens

QUALITY OF LIFE IMPROVEMENT



Survey Results

Important aspects of the quality of place



GOAL

Enhance the quality of life to support childcare, recreation, and tourism

PARTNERS

County Visitors Bureau, Community Foundations, Arts Council, Chambers of Commerce, NROC, Universities, Local Municipalities and County Officials, SHPO, SENDD

STRATEGIES

Compile and distribute information on resources that support child care gap financing

Work with area early childcare providers to create a "fill-in-the-blank" business plan for start-ups or expanding childcare centers

Work with local, regional, or national partners to improve food security and food finance infrastructure

Identify and distribute resources that support rural community recreation opportunities (i.e. trails, golf courses, outdoor gyms, parks)

Identify and distribute information about historic preservation and arts and humanity opportunities

PERFORMANCE MEASURES

Provide technical assistance to at least ten communities annually on quality of life resources

Assist at least two childcare centers with their business plan or expansion (one start-up and one expansion)

Write one grant annually that relate to tourism development

Write two grants annually that relate to recreation

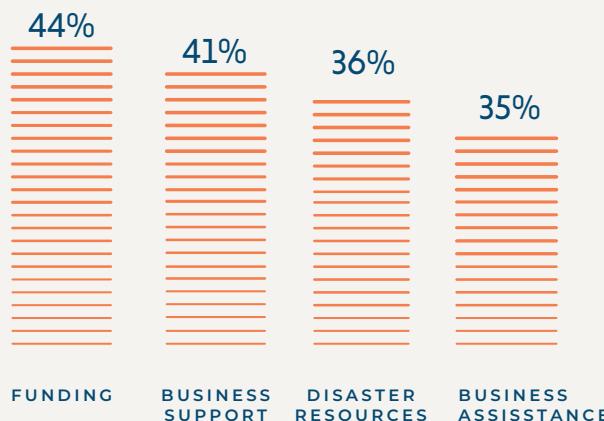


DISASTER PLANNING & RESILIENCE



Survey Results

Important aspects of disaster planning in southeast Nebraska



GOAL

Increase awareness for disaster preparedness and mitigation by enhancing community resilience

PARTNERS

Emergency Managers, FEMA, NEMA, NRDs, EPA, Public Power Districts, NeDNR, Local Municipalities and Counties, SENDD

STRATEGIES

Establish a methodology for and complete an inventory of disaster-vulnerable systems across the region

Make data and resources readily available for communities to better understand disasters

Develop and maintain a disaster recovery plan

Research and promote available funding opportunities to support resilient development in member communities as requested

Attend local conferences or workshops that address the topics of disaster vulnerability and resiliency

Coordinate community events and/or competitions centered around creating

awareness and proposing creative solutions to climate change problems and regional resiliency challenges

PERFORMANCE MEASURES

Maintain SENDD's disaster recovery plan annually

Attend a conference related to disaster planning and resilience annually

Identify multiple funding opportunities annually

Distribute resources on an as requested basis

Distribute disaster related information through newsletters bi-annually

Host an annual event or webinar that creates awareness and proposes creative solutions for climate change and regional resiliency challenges

5

Economic Resilience



ECONOMIC RESILIENCE

What is economic resilience?

The US EDA notes that economic resilience includes "three primary attributes: the ability to recover quickly from a shock, the ability to withstand a shock, and the ability to avoid the shock altogether."³⁴ Resilience is achieved through planning with the intent to prevent loss and evaluate unavoidable impacts; anticipate and build capacity to withstand change; recover from disruptions quickly; and ultimately improve overall economic conditions.

ECONOMIC RESILIENCE CHALLENGES AND FACTORS

The challenges to SENDD's economic sustainability and resilience are related to its geographic location, development patterns, demographic profile, and other external factors.

Drought, Hail, Flooding Tornadoes

Disasters such as drought, hail, flooding, and tornadoes among others pose a threat to southeast Nebraska, including the loss of life, damage to buildings and infrastructure, deterioration of water environments, and other effects on a community's economic, social, and environmental well-being.

Under current circumstances, over 25% of the land area in the region is at risk of flooding. Flooding, a recurring hazard in the area, has cost the region millions of dollars in infrastructure rebuild and repairs. In the spring of 2021, SENDD collaborated with the University of Nebraska-Lincoln (UNL) to assess the health of water infrastructure across the region. The project members surveyed a handful of counties in the region, and data regarding the condition of dams, bridges, and levees was collected. The report shows that Lancaster County is the most at risk due to the large population, extensive land area, and multiple dams and levees. Another essential thing to note is that the maintenance costs of these infrastructures can increase year to year.³⁵ SENDD is in the process of designing a resiliency plan that addresses these present challenges and proposes solutions that are sustainable over time. SENDD staff put together a **story map** showing the spatial impacts of hail, windstorms, droughts, and tornadoes in the region.

The adoption of the America's Water Infrastructure Act (AWIA) in 2018 expanded the mission of the 1974 Safe Drinking Water Act (SDWA) to improve water quality, deepen infrastructure investments, enhance the public health and quality of

life, and increase jobs. The EPA's Risk and Resilience Assessment reporting tool allows communities to identify the vulnerability of their water system to malevolent acts (e.g. bio-terrorism) or natural hazards (e.g. earthquakes, floods and tornadoes).³⁶

Scientists anticipate that there will be stronger snowstorms with more precipitation and the threat of more frequent and extensive flooding to the region. Temperatures are anticipated to continue rising, degrading air quality, straining local indigenous flora and fauna, exacerbating health-related problems, and, in the long run, population loss.³⁷

Demographic Diversity

The SENDD region has limited diversity. The 2019 American Community Survey data indicates that 95% of the total population is White, 0.9% is Black or African American, 0.5% is American Indian or Alaska Native, and 0.6% is Asian. Out of the total population, 5.6% of residents identify as Hispanic or Latina/o/x.

The region has several environmental justice populations, typically due to income criteria (households earning 65% or less of statewide median household income, at the Census

2010 block group level). More information on the region's demographics can be seen in the Regional Overview section of this document.

Developable Areas and Infrastructure

A few counties in the region have large tracts of land sitting on the floodplain, with reduced development potential. Saunders County, for example, has a significant portion of its land area in a floodplain. As a result, the amount of vacant land available for development is limited. This constraint, combined with regulations that encourage sprawling development patterns, particularly in housing, leads to higher land costs, and thus higher living and development costs in some parts of the region.

Members of the public agreed that the region's existing infrastructure is aging, according to the survey [See Appendix 4]. Lack of investment in wastewater treatment systems has also limited regional economic growth; additionally, the impact of flooding and other hazard conditions may have contributed in aging infrastructure, which can slow growth. There is little incentive to expand businesses or build more affordable housing without wastewater infrastructure.

35 Water related Infrastructure Inventory and Assessment

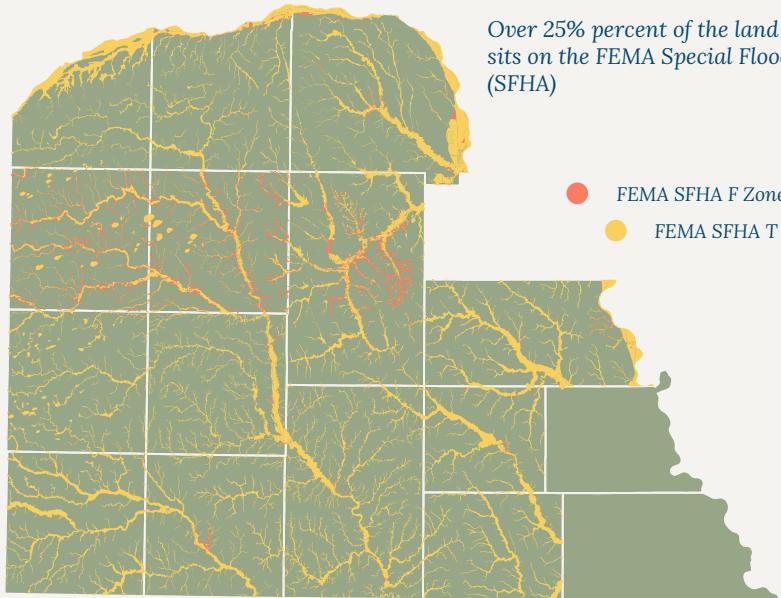
36 America's Water Infrastructure Act: Risk Assessments and Emergency Response Plans

37 The Signs of Climate Change

FEMA SFHA F Zone

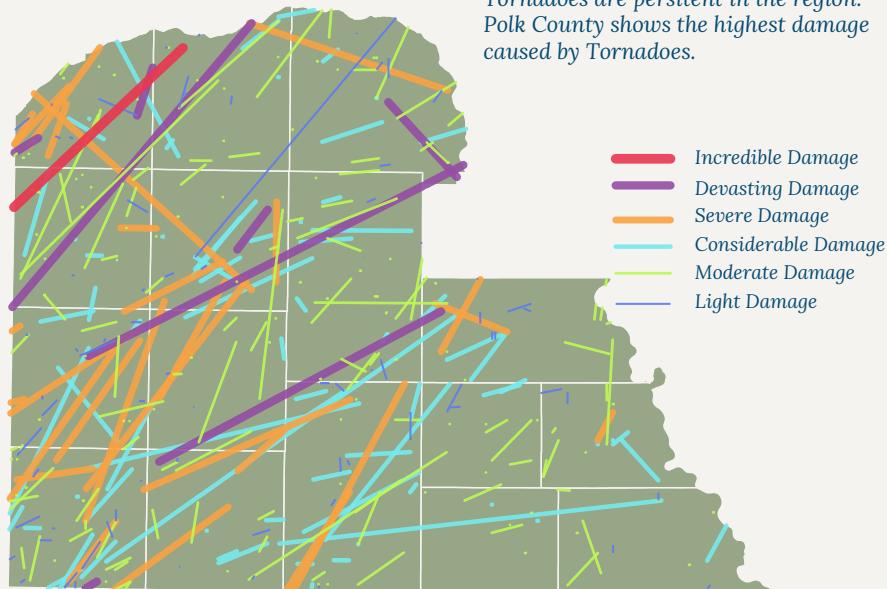
FLOODING

Over 25% percent of the land area in the region sits on the FEMA Special Flood Hazard Area (SFHA)

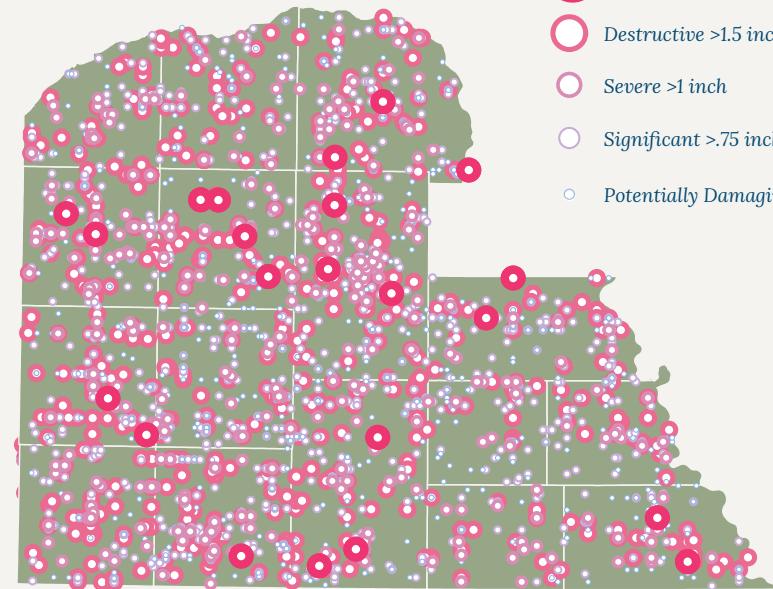


1980 - 2002 TORNADOES

Tornadoes are persistent in the region. Polk County shows the highest damage caused by Tornadoes.

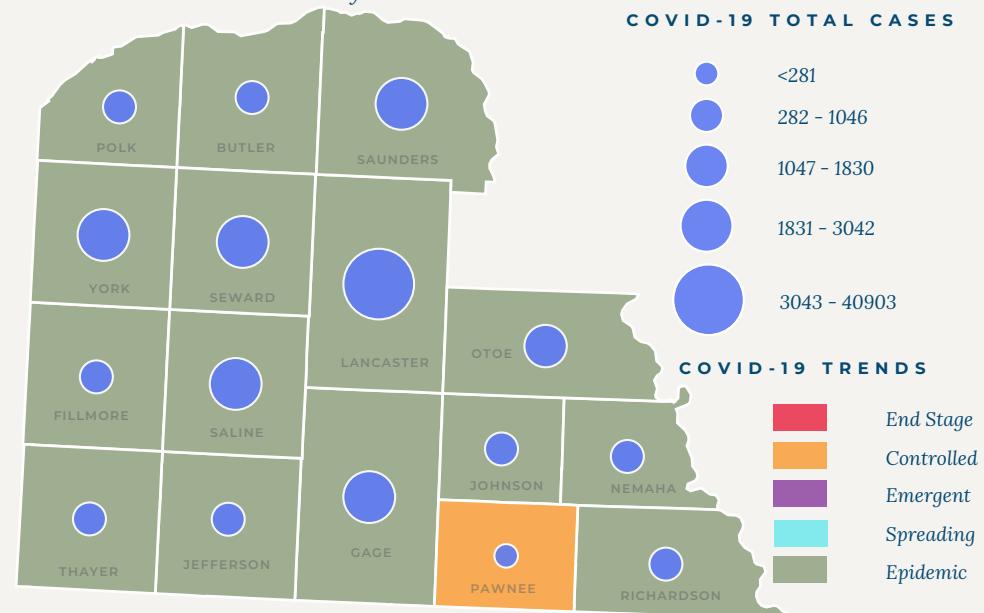


1955 - 2017 HAILSTORMS



COVID-19 TRENDS (2019 - 2021)

Pawnee County has a COVID-19 controlled trend. In the 14 days following the release of this data, on October 14, 2021, only one instance of Covid was recorded in the entire county.





The adoption of the America's Water Infrastructure Act (AWIA) in 2018 expanded the mission of the 1974 Safe Drinking Water Act (SDWA) to improve water quality, deepen infrastructure investments, enhance the public health and quality of life, and increase jobs. The EPA's Risk and Resilience Assessment reporting tool allows communities to identify the vulnerability of their water system to malevolent acts (e.g. bioterrorism) or natural hazards (e.g. earthquakes, floods and tornadoes)

Much of the region lacks access to high-speed internet, which is becoming increasingly important in today's economy. Access can open up new possibilities for remote work, innovative education, and healthcare, allowing more people to live and work in the region. More information on the broadband program can be viewed at www.sendd.org

Surprisingly, the region's surface water resources are vast. Wildlife, including many native fish species, rely on the streams for survival and a vibrant ecosystem. When it comes to protecting this valuable resource, residents in the region face numerous challenges. Rain and irrigation runoffs can carry chemicals and topsoil into streams in both suburban and rural areas, contaminating surface water. In some parts of the region, development has also lowered drinking and surface water quality, endangering human health. High demand for land and natural resources has resulted in skyrocketing land and housing prices, as well as biodiversity loss.

Directed, improved, and expanded transportation, water, wastewater, electric, and broadband infrastructure, that mitigates and adapts to environmental conditions, will be necessary to support long-term regional economic stability. Infrastructure organizations and internet networks must be resilient, bringing the benefits of regional investments

to the people, businesses, and institutions that are the backbone of the economy.

Threats to Community Character

Due to the COVID-19 Pandemic, the SENDD region's communal life has been put to the test. The parks and lakes are usually busy with residents engaged in recreational activities ranging from camping, fishing, kayaking, and hunting, generally strengthening the community bond, but the presence of COVID-19 changed that. COVID-19 has profoundly altered our lives, causing enormous human suffering and putting fundamental tenets of societal well-being into question.

A recent survey conducted by the Nebraska Chamber of Commerce and UNL, showed that 88.85% of private-sector businesses and nonprofits were negatively affected by COVID-19, 6.6% were positively impacted, and 7.55% were unaffected. In terms of job loss and income, about 50% of businesses reduced the number of staff and the number of hours worked by staff due to COVID-19.³⁸

A large portion of the service-based industries, in the business sector, were forced to shutter due to a lack of consumer contact. Supply chains were disrupted, schools were closed, and social gatherings were halted, putting community lives and systems at risk.

SENDD has been able to engage in recovery strategies with local businesses in the region. Disaster preparedness and mitigation techniques are currently being studied to ensure that the region's community systems remain resilient in the face of disaster.

ACHIEVING RESILIENCY GOING FORWARD

Resiliency provides the framework for regional economic development, informing how the region can embrace its challenges to create a more diverse, vibrant economy. As part of its commitment to resilience and recovery, SENDD appointed a disaster recovery coordinator to supervise a majority of the region's disaster recovery needs.

One major step is the establishment of a regional resiliency plan, which is now in the works. A new vulnerability research undertaken by UNL in partnership with SENDD indicates a need for increased and coordinated resilience across the region.³⁹ More finance and technical assistance resources are needed to ensure that the region reaches and maintains its highest level of resilience in the face of disasters.

Resiliency Tools

There is a suite of tools available to decision-makers and stakeholders to build regional economic resiliency. These include:

Disaster Preparedness addresses the response, recovery, and governance network of public and private organizations. Programs may include counseling and training for households, individuals, and businesses before and after disruptions; coordinated communications systems for post-disaster response and recovery; and developing business resources and financial support to improve and sustain recovery from disasters.

Economic research leverages robust data and information systems that describe the regional economy, enriching our understanding of past trends, the current economy, and developing projections that can guide current resiliency and planning efforts.

Integrated Planning involves using scenario planning to understand systems and interconnections. This method aligns local planning efforts into a larger regional vision, and across issue areas, political jurisdictions, and governance scales (from municipalities to federal government). Also, community visioning at the county level or community level ensures that the agreed-upon desired

future for the region comes to fruition. Visioning exercises help communities begin to consciously create a future by advancing a shared sense of purpose while encouraging the leadership needed to fulfill that purpose.

Infrastructure Assessment identifies vulnerable infrastructure and needs to better understand the link between infrastructure and economic activity, and the cost of disasters or shock on the economy and its systems.

Strategic plans for availability of funds before shocks or disruptions happen and cultivates local resources and insurance options for when they do. Providing training in federal or state funding opportunities better prepares communities to leverage financial resources in the wake of major events.

Recovery by Local Businesses and Business Continuity Planning is critical to the resilience of a community. Recovery networks and procurement procedures can be preemptively established to allow for quick action following an emergency. Planning can also reduce local businesses' dependency on government action. Establishing a system for providing necessary equipment to operate in an emergency situation, such as generators, may also reduce the amount of recovery time needed following an external shock.

SUMMARY

This 2021 Comprehensive Economic Development Strategy (CEDS) is a five-year action plan that addresses challenges and embraces opportunities to foster a resilient regional economy. The strategy is the product of a collaborative planning process, with stakeholders representing a variety of regional economic development concerns and members of the public.

Since 2015, the CEDS has been instrumental in securing the resources and collaboration needed to address some of the SENDD area's most severe and costly regional concerns. One success that bears mentioning is the execution of the Broadband mapping project, which is currently ongoing statewide. In addition, the CEDS sparked a rush of housing developments and a plethora of technical assistance to local businesses and residents.

Since the adoption and implementation of the CEDS, the Region has progressed to a resilient economy. However, the negative impacts of rapid decline in workforce population, gaps in supply chain networks, and disasters, among other things, continue to impact the Area. The environment has degraded local infrastructure assets, and the effects of climate change have just barely started to be resolved. The 2021 CEDS focuses on new economic opportunities in the Region through innovative solutions to growth, adaptation, and mitigation. High demand for a limited supply of resources continues to strain the affordability of land, housing, infrastructure, and commodities and services. This CEDS strives to protect this unique area while fostering a more diverse community and economy for residents and visitors.

The vision for the SENDD area is to enjoy a robust year-round economy with a workforce that lives, plays, and shops locally. Resilient infrastructure, strategic growth of employment, business opportunities, vibrant community spirit, consistent protection of the Area's assets and historical character will all help strengthen the local economy. The CEDS strategy framework is stated in five goals and six regional priorities that stakeholders agreed on at the CEDS workshop.

CEDS stakeholders collaboratively developed a roadmap for addressing the priority issues impacting regional economic wellbeing over the next five years. The Action Plan for 2021 CEDS includes the economic development goals, and strategies for the Region and action steps to achieve and implement the strategies. The Action Plan centers on six priorities, each with underlying strategies, performance measures, and partnerships. The Regional survey, SWOT analysis, stakeholder input, and recent statewide initiatives such as the Nebraska blueprint informed the Action Plan. The aim is to increase and build the Region's resilience and assets through a holistic approach to economic development based on the two fundamental pillars of Equitable Growth and Connectivity/Resilience.



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