

CITY OF COLORADO SPRINGS
VACANT COMMERCIAL, OFFICE AND INDUSTRIAL
LAND ANALYSIS

May 2007

Purpose

Over the past several years there has been interest in amending master plans and rezoning property from commercial, office and industrial type land use to residential land use. Many of these requests create conflicts between the need to retain property for its proposed future use as commercial, office or industrial and a perceived short term market for residential development. From this short term perspective many of the planned land uses do not align with the developers' objectives to immediately use their property.

This study identifies vacant parcels of land that are zoned or master planned for either commercial, office or industrial land use (COI). The City's Strategic Plan has a section that addresses the issue of assessment and availability of land for future development of land by major employers. Section 6.8.0 of the City's Strategic Plan calls for the development of a mechanism to assess the availability of commercial, office and industrial land for major employers. The specific language from the Strategic Plan is below:

6.8.0 Develop a mechanism for assessing the near-term (less than 2 years) and mid-term (2-5 years) availability of commercial office and industrial (COI) land for major employers based on proximity to infrastructure and services of CIP principles.

6.8.1 Monitor land use changes and rezoning of commercial, office and industrial (COI) land citywide and by subareas of the city and considering El Paso County's approved land use plans.

6.8.2 Evaluate commercial, office and industrial (COI) land availability in relation to Banning-Lewis Ranch infrastructure and utility planning timeframes.

Because of its past aggressive annexation practices, the city has significant amounts of undeveloped land area. Currently, about 35-40 percent of the city's land area is vacant. Colorado Springs has an abundance of land for future growth. It is estimated that it would require 40 to 50 years to build out the entire city. This estimate is based upon the conversion of population and employment forecasts into land use demand.

The major issue related to the conversion of COI land is location and not the amount of land zoned or master planned for COI use. There are over 14,000 vacant acres of COI land within the city limits. This report recommends five major locations with concentrations of COI land for retention. The parameters used to select the recommended areas are:

- Planned Transportation facilities
- Travel patterns
- Planned Major Utility infrastructure
- Jobs housing mix
- Development potential
- City of Colorado Springs Comprehensive Plan

The following sections of the report discuss planned infrastructure and land absorption, and make recommendations for the retention of COI land within five specific sub areas.

Background and Regional Context

Population Growth

Since the year 2000 there has been a steady population growth pattern for the City as well as El Paso County. The annual growth rate since 2000 is 1.4%. This amounts to an estimated 31,274 new city residents during this time period and is sixty-six percent of the total [population growth in El Paso County. County employment at 244,247 in 2005 has shown a marked increase since a decline dating to 2003 and is almost equal to the 2001 level of 245,568.

Land Use

Recently the physical development of the City has been concentrated in the north and northeast. Since 2001 approximately 3,826 acres have been annexed to the north and northeast portions of the City. Examples of these annexations are the Flying Horse Ranch, Woodmen Heights and the Allison Ranch. Annexation activity has slowed during the period of 2005 to 2006. There was a significant net decrease of 1,361 acres in the amount of vacant land within the City for the period of mid 2005 to mid 2006.

During the period of 2001 to 2006 there has been a steady growth in the residential and COI land use categories. The ratio of developed residential acres to developed COI acres remains at about 3.5 acres of developed residential land to each 1 acres of COI land developed. As of June 2006 there are 30,278 developed acres of residential land use and 9,163 developed acres of COI within the City. Table 1 illustrates the land use changes from 2001 to 2006.

Table 1

Land Use Change over Previous Year - Colorado Springs 2001-2006						
Land Use Category	2001	2002	2003	2004	2005	2006
Residential	737	667	858	919	604	755
Commercial Office Industrial	358	150	203	222	217	186
Park/Trails/Open Space	165	4	77	169	951	39
Vacant	-1495	-1201	-1463	145	-9	-1316
Institution	92	149	-104	105	92	272
Other	145	410	431	372	383	728

El Paso County Sketch Plans

El Paso County's sketch plans are much like City master plans. The sketch plan is an initial step in the development process and as such it serves as a guide for development of land. An examination of the approved El Paso County sketch plans that are located along the City's eastern and southeastern edge reveals a small amount of land designated for COI land use. About 20 sketch plans were examined totaling over 21,000 acres. Of these 21,000 plus acres about 13,000 acres were designated as residential with 2,300 acres or about 11% classified as COI.

Planned Infrastructure Improvements

There is a strong relationship between infrastructure improvements and the location trends of development. The capacity of roads and utility infrastructure is key in the decisions made by the private sector in their selection of areas for the location of new facilities or the addition to existing facilities.

Generally, the extensions of major roads and utility lines are the developer's responsibility. This policy allows the land developer to manage the timing of the expansion of major transportation and utility infrastructure. Thus the areas that may become available for development are largely dependent upon land owners and their development phasing.

Transportation

The creation of the Pikes Peak Regional Transportation Authority (PPRTA), which is a sales tax funded agency, has provided funding and oversight for capital projects for roadway construction and roadway capacity enhancements. Most of the PPRTA projects are intended to expand the capacity of existing streets and intersections. Examples of these projects include the widening of Woodmen Road from I-25 to Powers Boulevard, construction of an interchange at Austin Bluffs Parkway and Union Boulevard and the replacement of the Cimarron Street Bridge over Interstate 25. See attached project list (Figure 1) for capital projects scheduled for 2006-2010.

In addition to the PPRTA projects, the Colorado Department of Transportation (CDOT) is adding a fifth and sixth lane to I-25 and improving interchanges between Cimarron Street and the South Academy entrance to the United States Air Force Academy to expand capacity. CDOT is also about to begin construction of an interchange at the intersection of Woodmen Road and Powers Boulevard.

Utilities

There are several projects planned that will expand the service capacity for water and wastewater. The Southern Delivery System is a project that will transport water from the Pueblo Reservoir to a storage and treatment facility located in the northeast portion of the Banning Lewis Ranch near Jimmy Camp Creek. The initial phase of the project is a 43 mile long, 66 inch diameter raw water pipeline, a water treatment plant and the associated pipeline to transport the treated water. The second phase of the project is the construction of one or two storage facilities. One of the storage facilities is planned for the Banning Lewis Ranch on Jimmy Camp Creek. This project is needed for the continued growth of the City's east side.

There are two new major wastewater treatment facilities, one proposed and one recently completed. The J.D. Phillips Water Reclamation Facility is located south of the Pikeview Reservoir located just south and east of the intersection of Garden of the Gods Road and Mark Dabling Boulevard and is now operational. The plant will treat 20 million gallons of wastewater per day, with a 30 million gallon per day treatment capacity at full build out. The facility will reduce demand on the existing wastewater collection system

and the lone wastewater treatment plant on Las Vegas Street. The addition of this plant increases Colorado Springs Utilities' capacity to serve the northwest and northern sections of the city such as Northgate, Interquest and Flying Horse.

The second major wastewater facility is the Clear Spring Ranch Regional Water Reclamation Facility. It is planned to be located at the Clear Spring Ranch. The ultimate capacity of the treatment plant is 30 millions gallons per day. As part of an agreement between Colorado Springs Utilities and land developers working in the eastern and northeastern portions of the city, the first phase of this plant (10 mgd) is planned to be operational by 2012. The Banning Lewis Ranch Company developments in the northeast portion of Colorado Springs are allowed up to 2.7 million gallons per day peak to the Las Vegas Treatment Plant. This is roughly equivalent to 7,500 single family equivalents. This will allow for development to occur in the northeast portion of the city while the new wastewater treatment plant is being constructed.

The planned utility projects for the expansion of water and wastewater facilities will service areas of the city that are projected for most of the City's future development.

Project Name	Location	Cost Estimate	2006 Cost Est. *	Managed By	City 2005 **	City 2006	City 2007	City 2008	City 2009	City 2010	Anticipated Project Completion
GROUP A	TOTAL COST GROUP A:	\$190,274,000	\$212,830,880								
2 Austin Bluffs Interchange	at Union Boulevard	31,700,000	\$35,504,000	City Engr.	\$7,511,000	\$15,000,000	\$12,993,000				2009
3 Woodmen Road Widening & Interchange	I-25 to Powers Blvd	40,000,000	\$44,800,000	City Engr.		\$1,000,000	\$13,300,000	\$6,000,000	\$10,000,000	\$14,500,000	2010
4 Cimarron Street Bridge	at Conejos Street	4,800,000	\$5,376,000	City Engr.					\$1,000,000	\$4,376,000	2011
5 South Metro Accessibility, Phase I	SH 115 to Powers Blvd	60,000,000	\$67,200,000	City Engr./County	\$4,261,960	\$2,387,100		\$18,417,000	\$3,556,080	\$5,674,000	2010
7 Austin Bluffs Corridor Improvements	Nevada Ave to Academy Blvd	18,760,000	\$21,011,200	City Engr.						\$4,000,000	2013
13 Austin Bluffs/Nevada Improvements	Austin Bluffs/Nevada	3,995,000	\$4,474,400	City Engr.	\$3,995,000	\$479,400					2007
14 I-25 Interchange Companion Projects	Bijou/I-25; Nevada/Rockrim/I-25	2,300,000	\$2,300,000	CDOT/City Engr.	\$100,000	\$2,100,000	\$100,000				2007
15 Fillmore/Union Improvements	Fillmore/Union	1,087,000	\$1,217,440	City Engr.	\$500,000	\$717,440					2007
21 Fillmore Street Corridor	I-25 to Centennial Blvd	4,800,000	\$5,376,000	City Engr.				\$1,500,000	\$3,876,000		2010
22 Austin Bluffs Corridor Improvements	Barnes Rd to Old Farm Dr	2,732,000	\$3,059,840	City Engr.					\$3,059,840		2010
24 Academy/Fountain Safety Improvement	Academy Blvd/Fountain Blvd	395,000	\$442,400	City Engr.	\$395,000	\$47,400					2007
29 Austin Bluffs Bridge Widening	at Cottonwood Creek	2,300,000	\$2,576,000	City Engr.				\$500,000	\$2,076,000		2009
30 Vincent Drive Bridge	at Cottonwood Creek	5,314,000	\$5,951,680	City Engr.				\$1,500,000	\$4,451,680		2010
33 Hancock Avenue Bridge	at Templeton Gap Floodway	3,640,000	\$4,076,800	City Engr.						\$800,000	2010
34 Union/Palmer Park Improvements	Union Blvd/Palmer Park	135,000	\$151,200	City Engr.	\$135,000	\$16,200					2007
35 25th Street Bridge	at Fountain Creek	350,000	\$392,000	City Engr.						\$392,000	2010
36 Constitution/Circle Dr Improvements	Constitution Ave/Circle Drive	800,000	\$896,000	City Engr.		\$896,000					2007
37 Fillmore Street	Templeton Gap to Hancock	548,000	\$613,760	City Engr.		\$613,760					2007
38 Garden of the Gods/Chestnut Improvements	Garden of the Gods/Chestnut	375,000	\$420,000	City Engr.			\$420,000				2007
39 Fillmore/El Paso St Improvements	Fillmore Street/El Paso Street	265,000	\$296,800	City Engr.		\$296,800					2007
40 Vincent Drive Extension	Nevada Ave to Dublin Blvd	5,118,000	\$5,732,160	City Engr.				\$1,500,000	\$4,232,160		2010
43 Academy Blvd/Pikes Peak Improvements	Academy Blvd/Pikes Peak Ave	860,000	\$963,200	City Engr.		\$963,200					2007
TOTAL					\$16,897,960	\$24,517,300	\$26,813,000	\$29,417,000	\$32,251,760	\$29,742,000	

Figure 1

Land Absorption

As a market study was not possible for this analysis, land absorption data was used in place of demand data. The Comprehensive Planning Division has been tracking land absorption by land use type since 1997. Data on the number of acres converted from vacant to COI land use over time substituted for a market study. Data for the seven year period from 1999 to 2006 was used to determine the average annual rate of land absorption. Table 2 below indicates the acres per year converted to the three land use types for a seven year period beginning in July of 1999.

TABLE 2
COI Citywide Absorption July 1999 to June 2006

Land use Type	1999 Acres	2006 Acres	Net Change	Acres per Year
Commercial	2963 ac	3808 ac	845 ac	121
Office	1202 ac	1689 ac	487 ac	70
Industrial	3426 ac	3666 ac	240 ac	34

Source: Comprehensive Plan Annual Report 2005-2006, Land Use by Type Table

In order to facilitate data analysis at a more discrete level, the city has been divided into nine analysis zone referred to as Planning Evaluation Zones (PEZ). Figure 2 is a PEZ boundary map. The number of acres of COI land absorbed for the seven year analysis period was calculated for each of the evaluation zones. Between sixty-five to seventy percent of the COI land absorbed during the seven year period from 1999 to 2006 is located within three Planning Evaluation Zones; 5 (south central), 7 (north, northeast) and 9 (east). These are the areas where growth is occurring and where most of the vacant land is located.

TABLE 3
COI Absorption, PEZ 5 July 1999 to June 2006

Land use Type	1999 Acres	2006 Acres	Net Change	Acres per Year
Commercial	504	591	87	12
Office	156	224	68	10
Industrial	748	826	78	11

Source: El Paso County Assessor's Records

TABLE 4
COI Absorption, PEZ 7 July 1999 to June 2006

Land use Type	1999 Acres	2006 Acres	Net Change	Acres per Year
Commercial	675	966	291	42
Office	343	545	202	29
Industrial	459	475	16	2

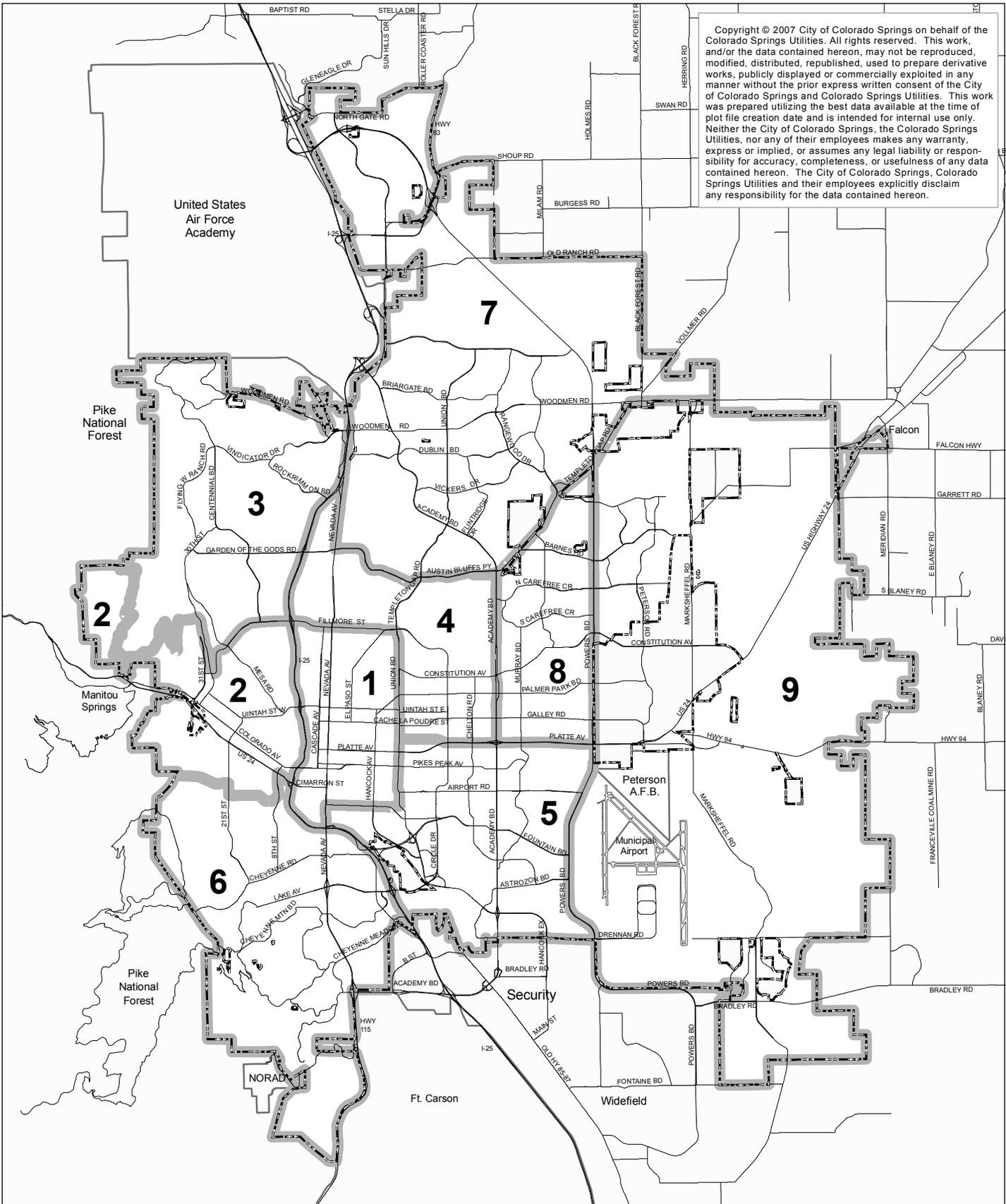
Source: El Paso County Assessor's Records

TABLE 5
COI Absorption, PEZ 9 July 1999 to June 2006

Land use Type	1999 Acres	2006 Acres	Net Change	Acres per Year
Commercial	42	215	173	25
Office	5	72	67	10
Industrial	123	187	64	9

Source: El Paso County Assessor's Records

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City of Colorado Springs
Planning Evaluation Zones
 (Revised April 2004)

— PEZ Boundary □ CityLimits

0 0.5 1 Miles



Figure 2
 Page 9

Analysis and Recommendation

Recent Trends

Within the city there are two main areas of new office construction outside of the central business district. The north Interstate 25 corridor in the Interquest and Northgate areas is experiencing expansion with Progressive Insurance and Federal Express as recent additions. The second area is the vicinity around the Colorado Springs Airport and Peterson Air Force Base. The main driver for the increased development in this area is the defense industry. New commercial development is occurring along the Powers Boulevard corridor from Interquest Parkway south to Platte Avenue. This is serving residential development in the Powers Corridor, as well as county residential development in the Falcon area.

El Paso County has approved numerous sketch plans along the eastern and southern boundaries of the city. The county’s sketch plans are equivalent to the city’s master plans. These plans provide a general layout of the various proposed land uses, road alignments and utility corridors within the development.

The predominant land use within these sketch plans is residential with small amounts of supporting commercial. It does not appear that El Paso County is identifying and reserving areas for employment growth, and therefore the city will continue to be the regional center for most employment in El Paso County. Regionally examining the amount and location of COI land is key in this analysis. The jobs housing imbalance within the county makes it critical that the city consider this in its analysis and recommendations.

COI Land Use Supply and Consumption

There are about 14,475 acres of vacant land city wide that are either master planned or zoned for COI land use. 14,475 acres is about 33 percent of the total vacant land in the city. How do these 14,475 COI acres break down? The analysis separated each category into size ranges by potential land use types. As an example, in the table below the commercial category includes all land that is vacant which is zoned or master planned for commercial use. Like areas were mapped for all three land use categories and then separated in four size categories. The table below shows the citywide break down by potential land use and size of area.

Table 6

Vacant Master Planned and Zoned COI (Citywide)									
	Count by Range				Total Acres by Range				
	lt5 acres	5-15 acres	15- 25 acres	25+ acres	lt5 acres	5-15 acres	15- 25 acres	25+ acres	Total Acres
Commercial	630	88	29	28	517	756	571	2149	3993
Office	175	28	5	10	170	245	84	1115	1614
Industrial	350	62	25	40	286	516	461	7606	8869
Total	1155	178	59	78	973	1518	1116	10869	14476

The stated objective in the Strategic Plan is to identify land available for use by major employers. It is assumed that for the purpose of assessing employment opportunities the 15 to 25 and the 25 plus acre categories are the areas most likely to be targeted by major employers for development. The majority of the 15 to 25 acre and 25 acre plus parcels are located within Planning Evaluation Zones 5, 7 and 9. Citywide there are 137 parcels in these two categories and 116 of the parcels are located within the three Planning evaluation Zones. See Table 7 below.

Table 7
Vacant MP and Zoned Parcels
Count by Range
PEZ 5, 7 and 9

	< 5 acres	5 to 15 acres	15 to 25 acres	>25 acres
PEZ 5	229	40	13	7
PEZ 7	248	35	24	26
PEZ 9	89	49	12	34
TOTAL	566	124	49	67

Source: El Paso County Assessor's Records

Recommendations

Five nodes have been selected where the concentrations of COI land should be retained. Listed below are the general criteria used to select the areas recommended for retention.

- Relationship to existing and planned utility infrastructure
- Existing and planned major transportation infrastructure
- Regional employment implications outside the city limits
- Current development trends
- City of Colorado Springs Comprehensive Plan

Node 1 Colorado Springs Airport Environs

This node (See Figure 3) is located generally between Galley Road on the north and Powers Boulevard/Bradley Road on the south and from Fountain Boulevard/Murray Road to Marksheffel Road. This node is one of the two major locations for new employment within Colorado Springs. Currently there are 2,814 vacant acres zoned for employment use in this area. Development trends and the desire to protect the operational viability of the Colorado Springs Airport were the main selection factors for this node.

Node 2 Central Banning Lewis Ranch

Located at the intersection of US 24, State Highway 94 and the proposed Banning Lewis Parkway is a concentration of 527 acres of commercial zoning, 654 acres of Office zoning and 1161 acres of industrial zoning (see Figure 4). This area is centrally positioned as the regional center for the eastern edge of the city and portions of El Paso County. It is a mixed employment and commercial center served by three major pieces of transportation infrastructure. The Comprehensive Plan designated this node as a Regional Center on the 2020 Land Use Map. A Regional Center is an area of mutually supportive combinations of COI land use. Designation as a regional center, its location within the Banning Lewis Ranch along with a central position that will allow it to serve both the city and the county, and the planned residential development in El Paso County are the three main factors for its recommended retention.

Node 3 Barnes/Marksheffel

This is an industrial node (see Figure 5) located east of Marksheffel Road between Barnes Road and Constitution Avenue. It contains 770 vacant acres zoned industrial. The proximity of major transportation facilities and the existing industrial land use pattern on the adjacent county land are the major factors for the recommendation.

Node 4 Woodmen/Powers to Marksheffel Road

This node is master planned and zoned commercial area (see Figure 6). There are 470 acres designated for commercial development within this district which is located along Woodmen Road from just west of the Powers intersection east to Marksheffel Road. The current development trends are for big box retail, auto dealerships and a hospital. The Comprehensive Plan designated this node as a regional center on the 2020 Land Use Map. The existing and planned expansion of the transportation infrastructure and the current trends of commercial firms are the major factors for selection as an area for retention.

Node 5 Northgate/Interquest

Located east of Interstate 25 (see Figure 7) generally between the Interquest and Northgate interchanges this area is a mix of employment and commercial opportunities. There are 431 acres of vacant commercial, 137 acres of office and 563 acres of industrial land. As with the area near the Colorado Springs Airport, this is an area where major employers have chosen to locate. The transportation infrastructure consists of the interstate highway, Powers Boulevard planned as a freeway and Interquest Parkway. The area has good access to these major roads, with two interchanges with the interstate. There are proposed interchanges with Powers Boulevard and Voyager Parkway and Powers Boulevard and State Highway 83. This node has been the area of choice for several major employers the past few years. Current trends by major employers and the exceptional transportation infrastructure, both existing and planned, are the major factors for the recommendation of this node.

Summary

The total of COI land that is vacant within the five nodes is just over 8,000 acres. Table 7 below summarizes the amount of COI land within each of the nodes.

Table 7

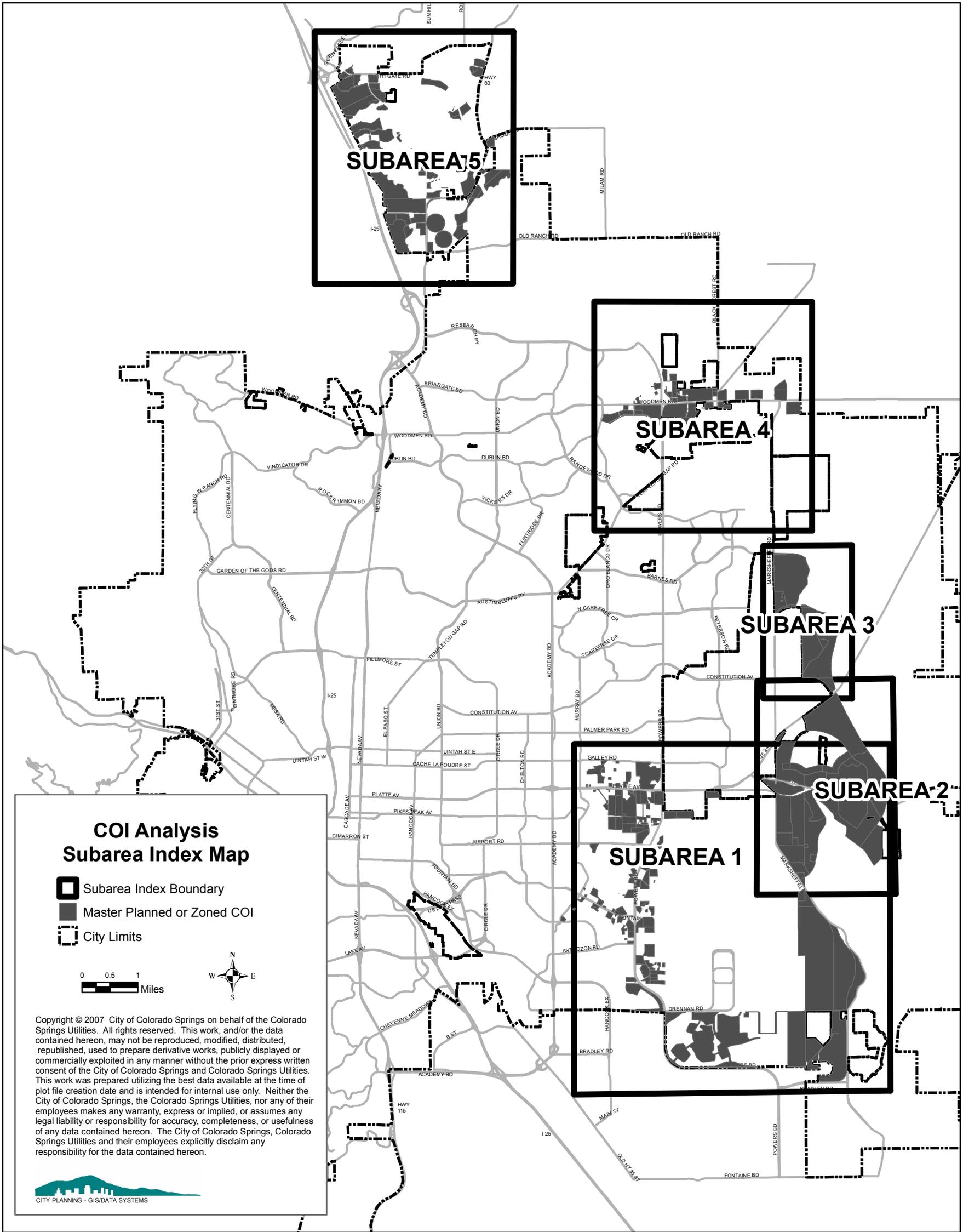
Node Composite COI Land
Acres

Node	Commercial	Office	Industrial	Total
1	260	22	2,833	3,115
2	527	654	1161	2,342
3	55	0	771	826
4	470	21	50	541
5	591	184	563	1,338
Total	1,903	881	5,378	8,162

Source:

The annual rate of consumption for COI land since 1999 is 225 acres per year. If that absorption rate were to continue there is a 36 year supply of COI land within the five areas recommended for retention.

The updating of the data in this report will be done as part of the annual update to the Comprehensive Annual Report.



**COI Analysis
Subarea Index Map**

-  Subarea Index Boundary
-  Master Planned or Zoned COI
-  City Limits

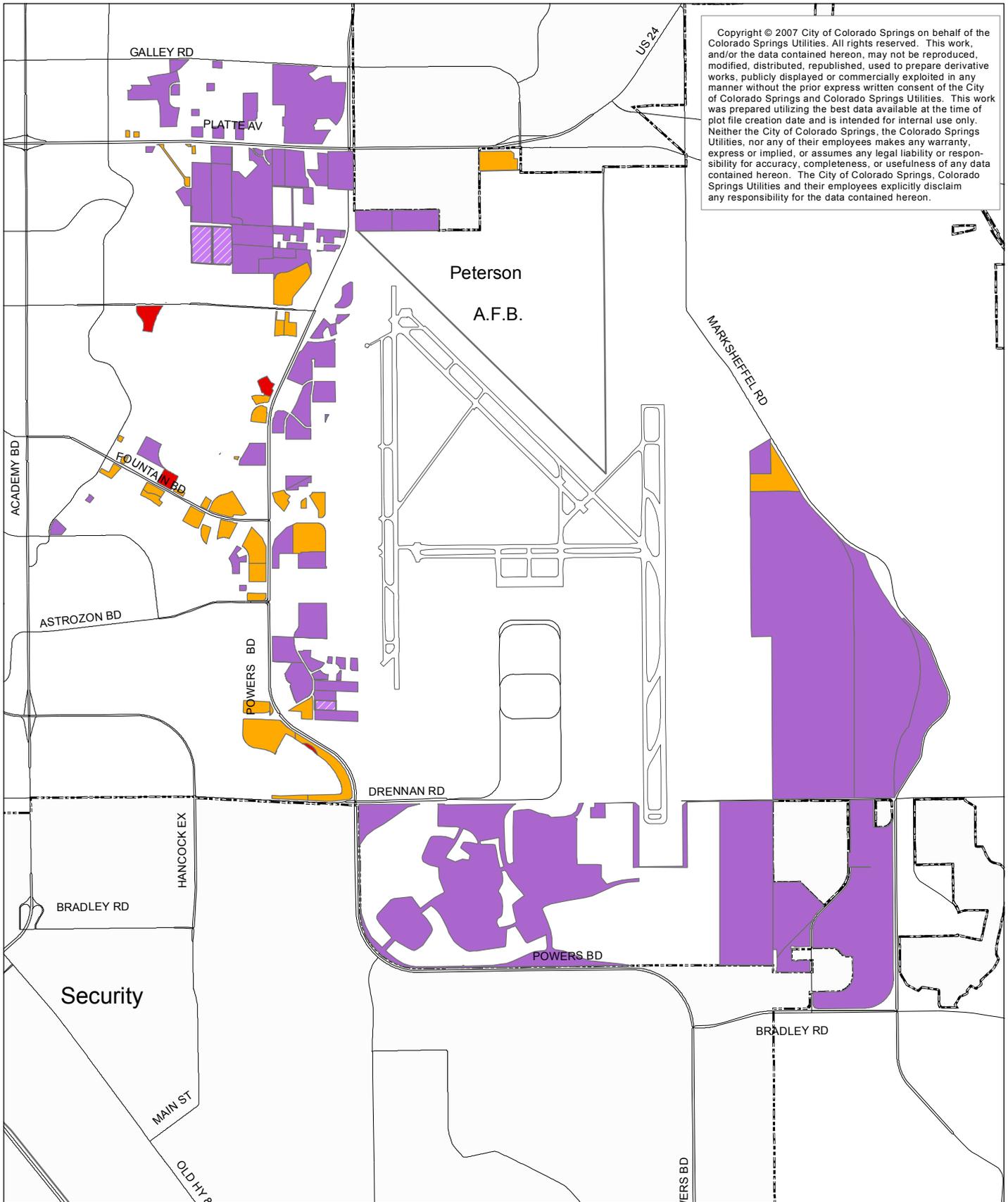
0 0.5 1
Miles



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City of Colorado Springs
COI Analysis
 Subarea 1

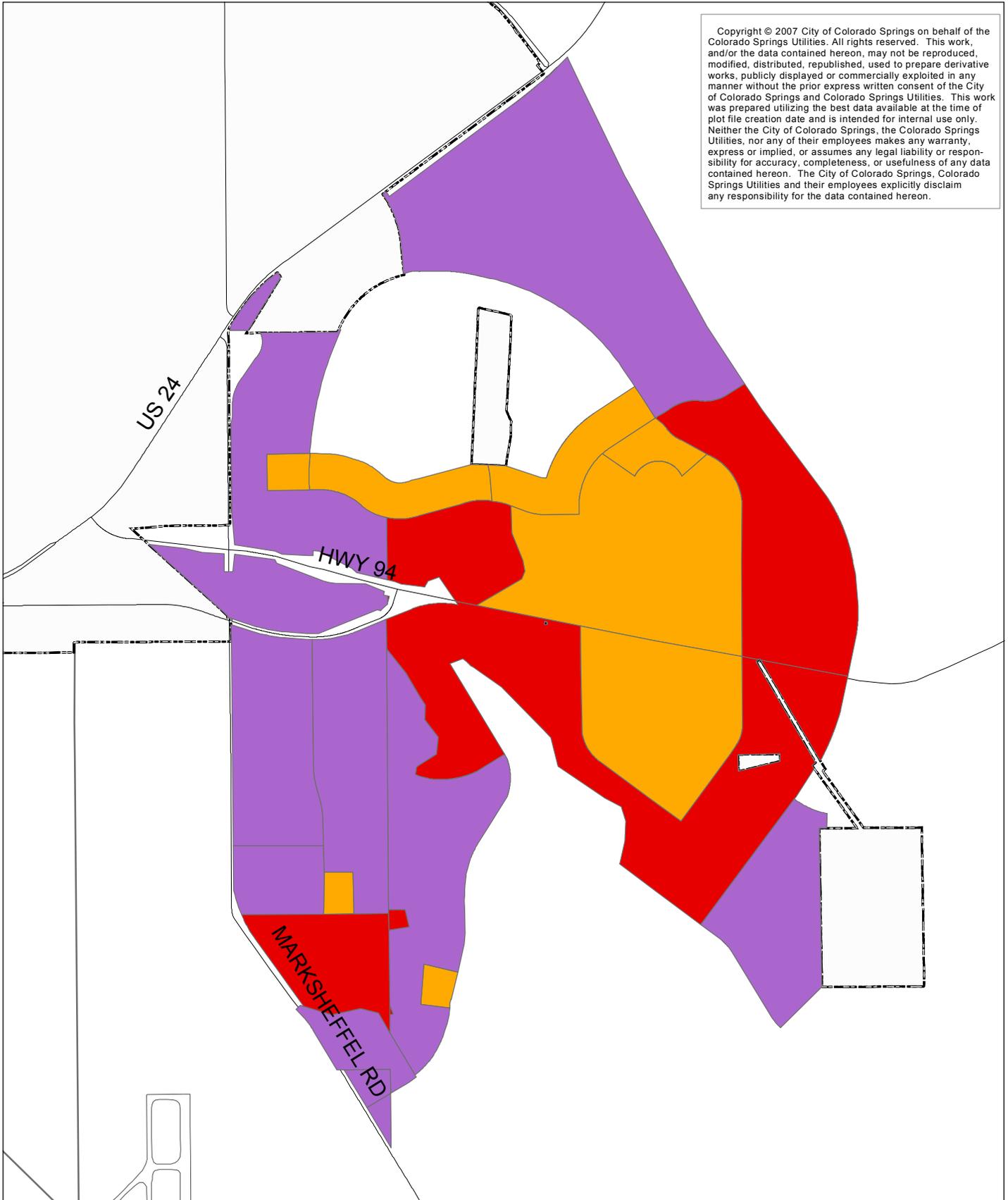


Vacant COI (zoning)		Vacant COI (master plans)	
■ Commercial (260 acres)	■ Commercial (.2 acres)	■ Office (21.6 acres)	■ Office (0 acres)
■ Industrial (2792 acres)	■ Industrial (40.5 acres)		



Figure 3
 Page 14

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City of Colorado Springs
COI Analysis
Subarea 2



Vacant COI (zoning)

- Commercial (527 acres)
- Office (654 acres)
- Industrial (1161 acres)

Vacant COI (master plans)

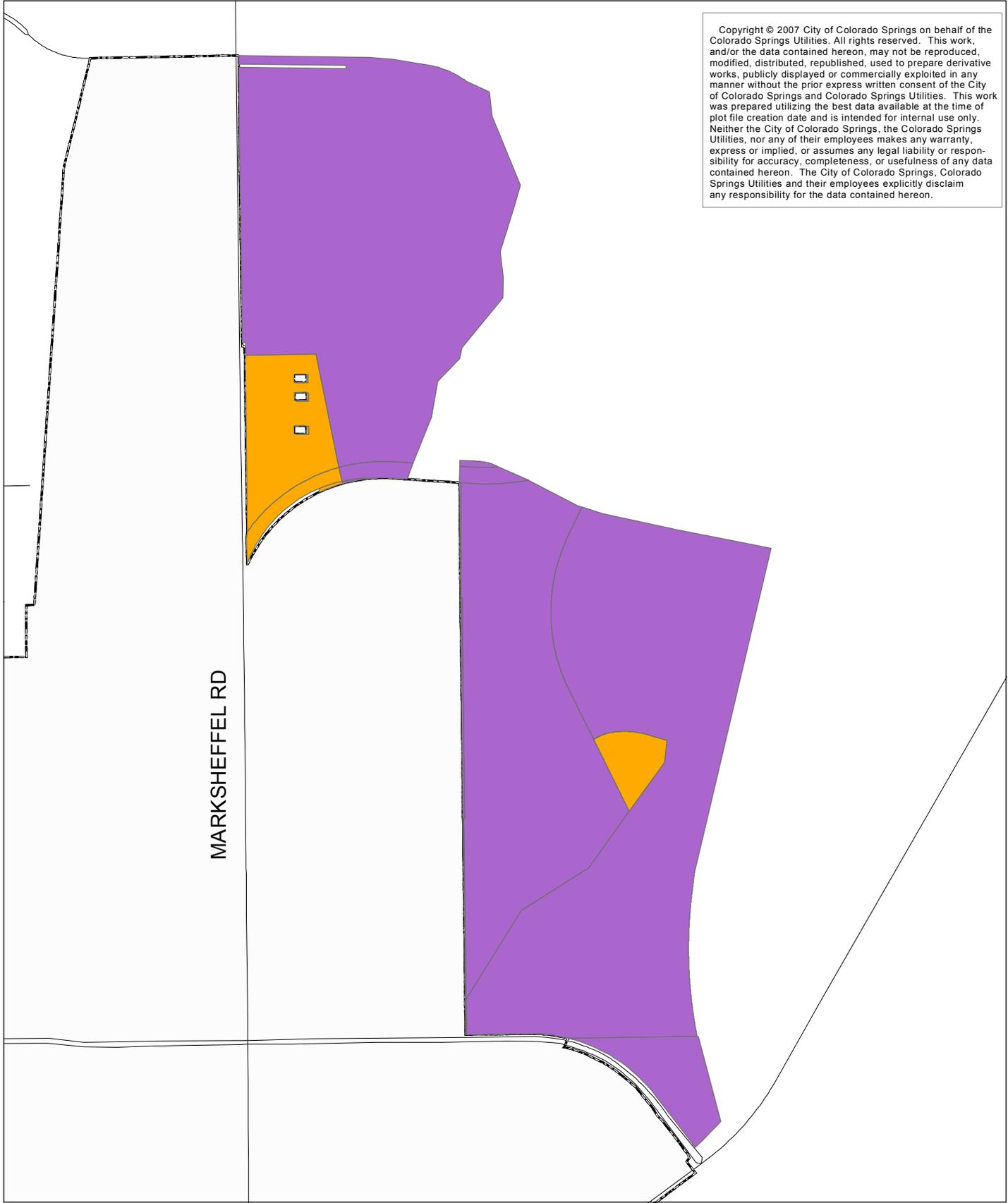
- Commercial (0 acres)
- Office (0 acres)
- Industrial (0 acres)

0 0.125 0.25 Miles



Figure 4
Page 15

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City of Colorado Springs
COI Analysis
 Subarea 3



Vacant COI (zoning)		Vacant COI (master plans)	
■ Commercial (55 acres)	■ Commercial (0 acres)	■ Office (0 acres)	■ Office (0 acres)
■ Industrial (771 acres)	■ Industrial (0 acres)	■ Industrial (0 acres)	■ Industrial (0 acres)

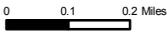
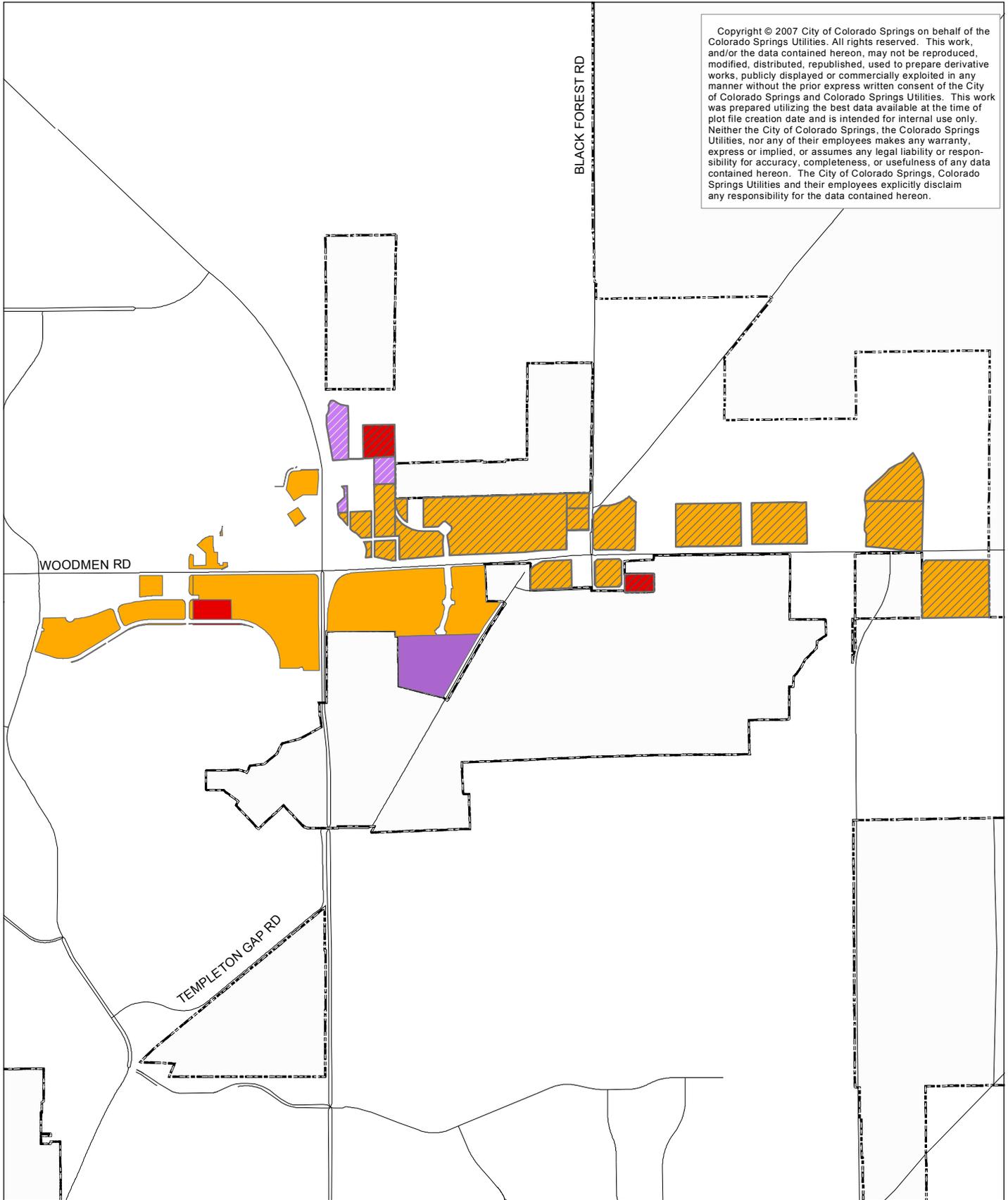


Figure 5
 Page 16

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City of Colorado Springs
COI Analysis
 Subarea 4



Vacant COI (zoning)

- Commercial (206 acres)
- Office (7 acres)
- Industrial (33 acres)

Vacant COI (master plans)

- Commercial (263 acres)
- Office (14 acres)
- Industrial (17 acres)

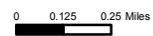
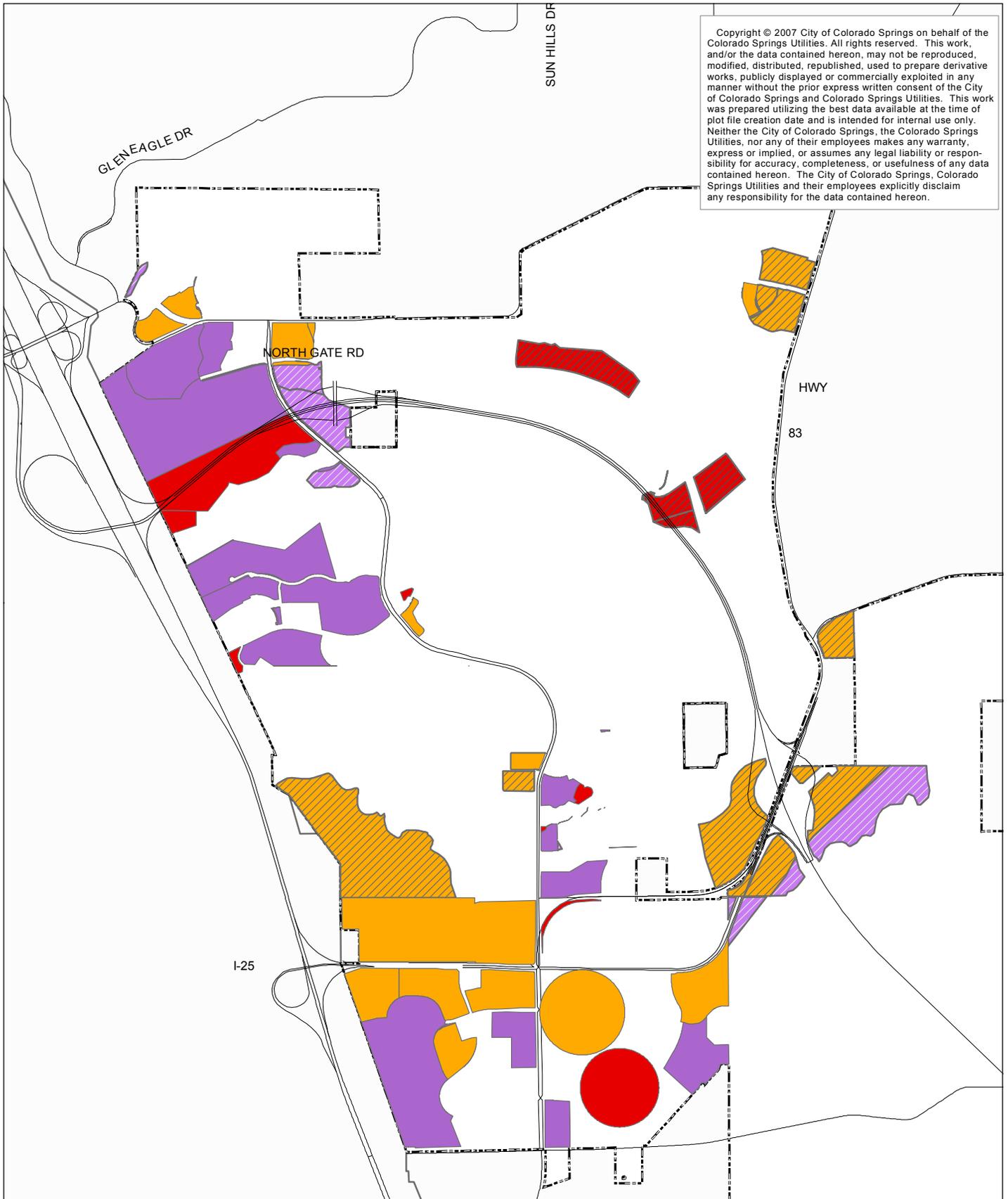


Figure 6
 Page 17

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City of Colorado Springs
COI Analysis
 Subarea 5



Vacant COI (zoning)		Vacant COI (master plans)	
 Commercial (318 acres)	 Commercial (246 acres)		
 Office (124 acres)	 Office (60 acres)		
 Industrial (465 acres)	 Industrial (98 acres)		



Figure 7
 Page 18