

JUNE 2024

**MOVING  
FORWARD  
FOR  
SUCCESS**

LEBANON, MO  
**PLAN 2040**



# ACKNOWLEDGMENTS

Thank you to all participants in the planning process. Your time, technical expertise, and guidance were critical to the development of the Lebanon, MO Plan 2040 (Plan). Your investment in this Plan is valued.

## City Leadership

### Mayor

Jared Carr

### City Council

Gib Adkins, Ward 1

Mike Evans, Ward 1

Sheila Mitchell, Ward 2

Dan Mizell, Ward 2

Jeffrey Mutchler, Ward 3

Randy Wall, Ward 3

Bob Garner, Ward 4

Chuck Jordan, Ward 4

## Planning Commission

Carrie Plassmeyer

Chris Meckem

David Wheeler

Jeffrey Stokes

Kristen Waterman

Michall Holmes

Randy Randolph

Shirley Tarwater

## Technical Committee

Michael Schumacher, City Administrator

Ashley Sicard, Administrative Assistant to City Administrator

Laina Starnes, City Clerk

Lacey Brackett, Deputy City Clerk

Joe Berkich, Code Administrator/Building Official

Christina Wagner, Planning and Zoning Manager

John Shelton, Director of Parks

Elliot Wilburn, Assistant Director of Parks

Richard Shockley, Director of Public Works

Tina Bash, Utility Operations Supervisor

Mike Wood, Airport Supervisor

Bryan Arnold, Chief of Police

Cynthia Coffman, Executive Director, Downtown Business District

Kat Gill, Director of Finance

Sam Schneider, Fire Chief

Rebecca Rupard, Tourism Director

Kim Schomaker, Compliance Specialist

Derek Gean, Communications

Kacie Springer, Detective Sergeant, Lebanon Police

Kathy Milliken, Human Resources Director

Brian Thompson, President/CEO,  
Lebanon Regional Economic Development, Inc.

Ann Hopper, Coordinator, GOCAPS Lake Region Program

---

## CONSULTANT TEAM

**olsson studio**

[olsson.com/olsson-studio](http://olsson.com/olsson-studio)

**Canyon Research Southwest, Inc.**  
Knowledge Based Real Estate Consulting Services

### **Comprehensive Plan Stakeholder Committee**

Eric Adams	Kenneth Howe	Joyce Ragland
Rachel Bailey	Emily Huckaby	Jonathan Reagan
Lance Boyer	Walter Hutton	Kelly Rhoades
Rachel Brennan	Shannon Imler	David Schmitz
Mark Buttschau	Jamie Johansen	Ramsey Stewart
Dylan Crocker	Brenda Jones	Randy Sutter
Dr. Pamela Dawson	Honey Lee	Shirley Tarwater
Tina Fears-Akers	Ashley Mahan	Danny True
Melinda Fries	Roger Moore	Lane True
Merri Hess	Sheila Moore	Melissa Wehner
Donovan Hibbs	Carrie Plassmeyer	Joanna Wilkinson
Kelly Hicks	Jared Plassmeyer	

### **Youth Committee**

Keirren Admire  
Parker Anthony  
Cole Dustin  
Saylor Hellen  
Emily Hopkinds  
Cara Lowrance  
Olvia McGruder  
Kameron Myers  
Macy Offutt  
Raylee Quick  
Jenna Rosen

### **Healthcare & Education Committee**

Dustin Childress  
Kevin McRoberts  
David Schmitz  
Michael Schumacher  
Melissa Wehner  
Jason Wilson



# CONTENTS

**SECTION 1** INTRODUCTION

**SECTION 2** VISION AND VALUES

**SECTION 3** LAND USE AND DEVELOPMENT FRAMEWORK

**SECTION 4** CONNECTIVITY FRAMEWORK

**SECTION 5** AESTHETICS AND CHARACTER FRAMEWORK

**SECTION 6** ACTION PLAN: IMPLEMENTATION FRAMEWORK



# APPENDICES

**APPENDIX A** EXISTING CONDITIONS

**APPENDIX B** PUBLIC ENGAGEMENT SUMMARY

**APPENDIX C** SUMMARY OF RELEVANT PLANS AND STUDIES

**APPENDIX D** ECONOMIC AND MARKET ANALYSIS

**[PAGE INTENTIONALLY LEFT BLANK]**

## SECTION 1 CONTENTS

PLAN OVERVIEW

PLANNING AREA

REGIONAL CONTEXT

HISTORY

THE WHY

PLANNING PROCESS  
AND TIMELINE

PLAN ORGANIZATION

HOW TO USE THIS PLAN



# INTRODUCTION

**Section 1** provides the foundation on which the comprehensive plan (Plan) is based. This section sets the scene for the Plan and answers why this planning process and the resulting document is necessary, how this document is used, and what the planning process entailed.

# PLAN OVERVIEW

This Plan serves as a guide for the identification and implementation of Lebanon's unified vision for its future. It builds upon the community's values and points Lebanon in the direction of its shared goals using a variety of tactics. The Plan addresses critical topics that will shape the way Lebanon continues to develop, including:

- Future land use recommendations based on input from stakeholders, the public, Zoning and Planning Commission, City Council, and city staff members and the findings from the Economic and Market Analysis (see **Appendix D**).
- Future housing options and opportunities to balance and diversify the existing housing stock.
- Economic development strategies that encourage a vibrant, healthy mixture of revenue generation sources.
- Transportation and mobility opportunities that enhance connectivity and mobility for residents and visitors.
- Outdoor recreation and enhanced entertainment options designed to enhance residents' quality of life and work within existing environmental conditions.
- Sustainability and resiliency opportunities woven throughout all recommendations to balance community desires, financial feasibility, and environmental needs.
- Strategies for improving the health, equity, and vibrancy of the community at large, from individual physical and mental health to social support systems, resources, and gathering opportunities.

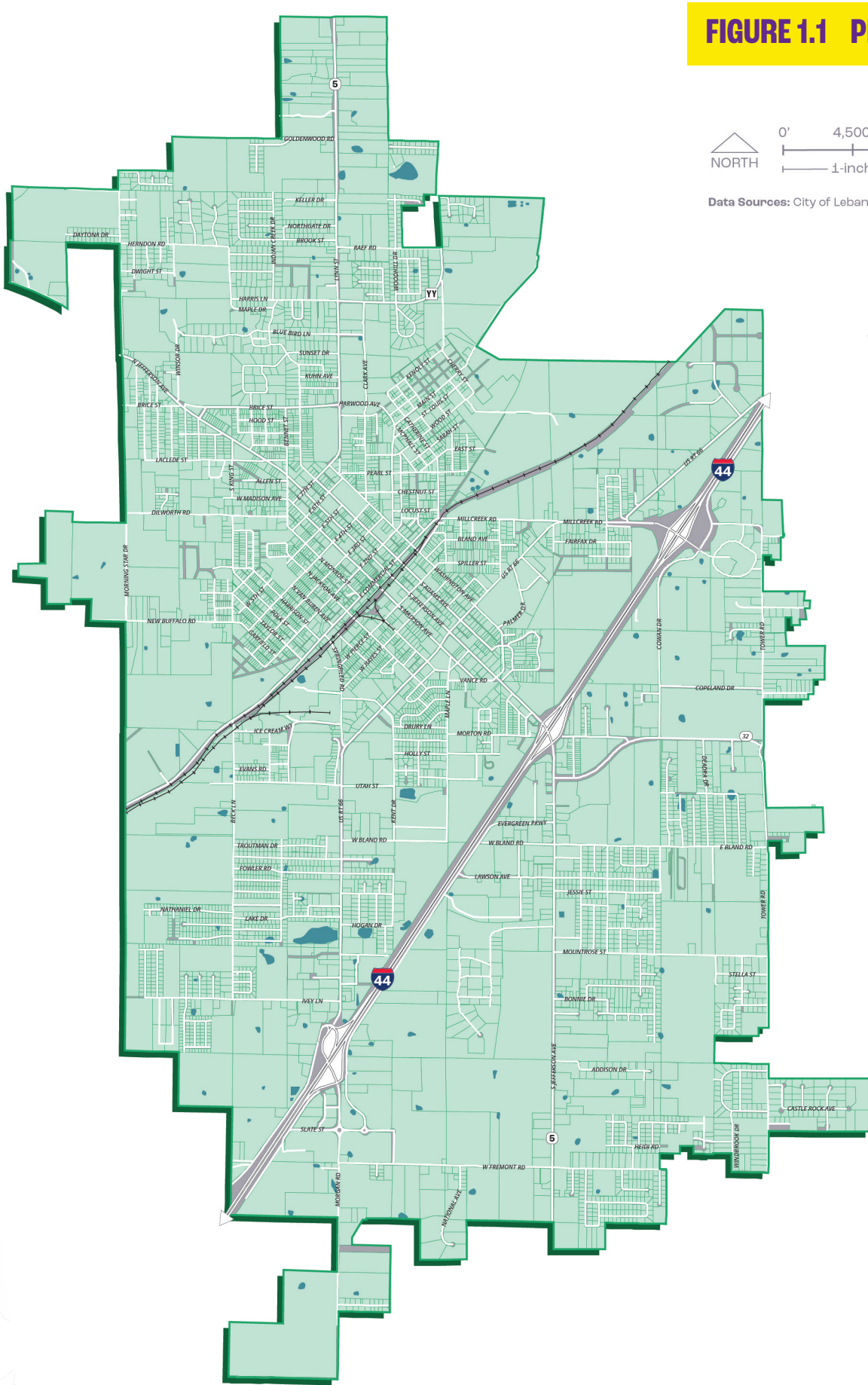
The planning process culminated in an integrated document (this Plan!) that reflects the needs and desires of the community and guides future decision-making related to the strategic and sustainable growth of Lebanon. The Plan provides a framework for the development of future public policy pertaining to development, redevelopment, transportation and connectivity, and the provision of community services and amenities.



## WHAT IS A COMPREHENSIVE PLAN?

A comprehensive plan – sometimes referred to as a general plan, master plan, or land use plan – is a vision for the future on a community scale. Comprehensive plans are created by and for the community to record shared goals and desires for themselves and their fellow community members. A comprehensive plan examines what a community is, where it came from, and crafts a coordinated road map for the future. This road map guides the growth and development of the community for the next 10 to 20 years and is revisited often to ensure its relevance. Effective plans are grounded and provide measurable, achievable action items for reaching shared goals. Communities can also use comprehensive plans as a factual and objective basis to justify future decision-making.

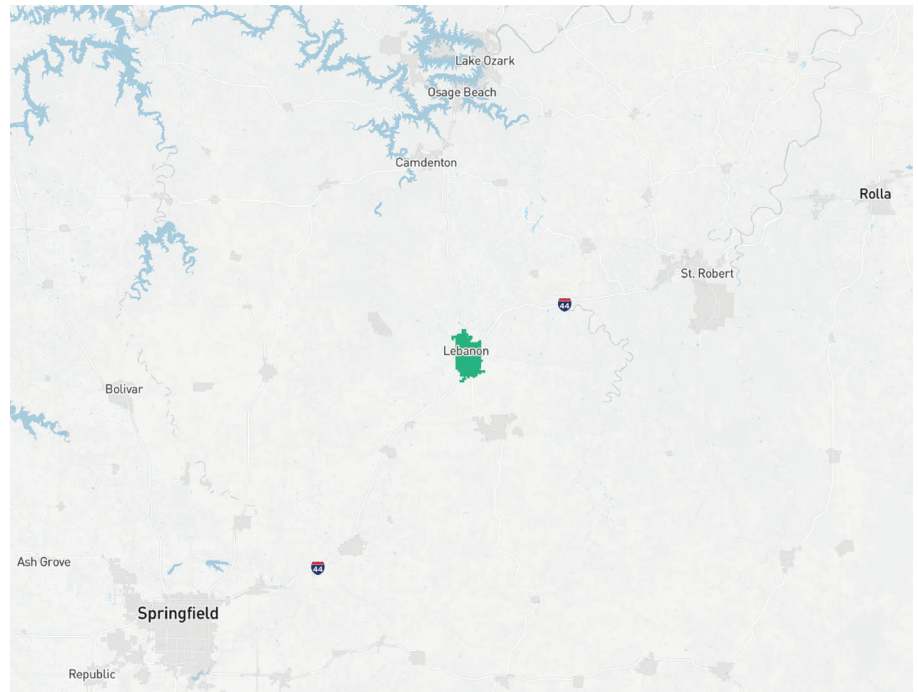
### FIGURE 1.1 PLANNING AREA



## REGIONAL CONTEXT

The City of Lebanon is in the south-central portion of Missouri and the seat of Laclede County in the Ozark Mountains about fifty miles northeast of Springfield, MO. Nearby cities include Camden, Missouri (23 miles); Lake Ozark, Missouri (36 miles); Springfield, Missouri (55 miles); Rolla, Missouri (57 miles); Kansas City, Missouri (91 miles); and St. Louis, Missouri (148 miles). The city occupies approximately 14.61 square miles – or 9,356 acres.

**FIGURE 1.2 REGIONAL CONTEXT**



## HISTORY

### LEBANON, MISSOURI: A RICH HISTORY OF RESILIENCE AND PROGRESS

Laclede County, named after Pierre Laclede, the founder of St. Louis, was formed in 1849 from parts of Camden, Pulaski, and Wright Counties. Situated in the breathtaking Ozark Mountains, the county shares borders with Webster and Wright Counties to the south, Dallas County to the west, Camden County to the north, and Pulaski and Texas Counties to the east. Lebanon, the county seat, lies approximately 155 miles southwest of St. Louis on I-44 and is home to more than 35,000 residents.

The area's history dates to 1820 when Jesse Ballew became the first white settler, constructing his log cabin on the east side of the Gasconade River. Soon after, other pioneers like Henry Anderson, William Montgomery, William Gillespie, William Tweedy, Leonard Eastwood, Jesse Williams, Spencer O'Neil, Josiah Tygart, Aaron Span, and James Campbell made Lebanon their home. Laclede County was surveyed between 1835 and 1840, officially becoming a county on February 24, 1849. Initially called Wyota, the county seat was later renamed Lebanon at the request of a local minister who wished to honor his hometown in Tennessee.

Lebanon played a significant role as America expanded westward. Initially, it was connected by a rough American Indian trail used by tribes such as the Wyota and Osage. During the Civil War, this trail, known as the "Wire Road," gained prominence due to the installation of telegraph lines between St. Louis and Springfield. Later, in the late 1920s, Route 66, which closely followed the path of the Indian trail, brought further significance to Lebanon. Archways proclaiming "Lebanon – Drive In – Our Town, Your Town"

## HISTORY CONTINUED

welcomed travelers entering town from the famous mother road. Today, I-44 largely follows the same route, preserving Lebanon's historical importance as a crossroads.

Lebanon officially became a 4th Class City on October 17, 1877, and has been governed by a Mayor/Council form of government since. In 1959, Lebanon achieved 3rd Class City status, a testament to its growth and progress.

Lebanon's early settlement began around the time Laclede County was established, utilizing 50 acres donated by the Benjamin B. Harrison and James M. Appling families. The town began to develop, and by the end of 1851, a log courthouse and jail were constructed on the square formed by Main, St. Louis, Broadway, and High streets.

During the Civil War, Lebanon faced the challenges of occupation by Union troops striving to protect the telegraph line. The town's population, comprised of people from border states, held strong sentiments both for and against the conflicting sides. Progress and development were significantly hampered until the conclusion of the war.

In the post-Civil War era, Lebanon experienced a resurgence. With the end of hostilities, businesses and progress began to flourish once more.

The advent of the railroad in 1868 revolutionized Lebanon. The Frisco Railroad established a station slightly away from the town center after the city officials declined to donate land for its construction. This refusal had also thwarted a previous attempt by the St. Louis-San Francisco Railroad to establish a depot in Lebanon. Consequently, businesses sprung up alongside the rails, giving birth to the "new" town. Today, Commercial Street, running parallel to the railroad tracks, remains the vibrant heart of Lebanon.

Lebanon's history also boasts a unique and fascinating chapter centered around its magnetic water. In 1889, during the excavation of a city water well, workers discovered that the water had magnetized their tools, enabling them to pick up nails. The magnetic water gained a reputation for its purported healing properties, attracting visitors who came to bathe and drink from the well. The grand Gasconade Hotel was built to accommodate these visitors. Unfortunately, the Gasconade Hotel was destroyed by fire after a decade of operation.

Lebanon thrives today as a vibrant and dynamic community, home to more than 15,000 residents. Known for its proximity to Bennett Spring State Park, which attracts approximately one million visitors each year, Lebanon continues to flourish as a small-town catering to travelers exploring the beautiful Ozarks. The city's economy is bolstered by major employers such as Tracker Marine, G3 Boats, Lowe Boats, Landau Boats, Osagian Canoes, Copeland, The Durham Co., Carmeco, DTE, Detroit Tool Metal Products, and Marine Electrical Products.

Lebanon, Missouri, is a testament to the perseverance, hard work, and friendliness of its residents. Its rich history, from early settlement to the present day, reflects a community that continuously strives to make progress and create opportunities for all who call it home.

# THE WHY

Lebanon's previous comprehensive plan was adopted in 2005 and developed in-house by the city and created to guide achievable objectives focused on key public facility improvements, new ordinances, and annexation. Comprehensive Plans are living documents and are reviewed regularly and updated over time to include updated demographics, market trends, and development activities. Lebanon took this course of action in 2019 with an update to present goals, strategies, and recommendations for the city that were reasonable and achievable for the city over a 20-25 year vision.

As part of the review process, the City of Lebanon has revisited the existing plan and identified it is necessary to review and update the existing plan to review existing conditions, market needs and trends, opportunities and needs while defining a clear vision for the success and future of Lebanon.

The intent of the Plan is to create a community-wide vision that resonates with the public at large. This planning process answered the following questions:



## ***Where is Lebanon today?***

This question defines what is loved about Lebanon, what needs improvement, and the current realities of the city.



## ***Where does Lebanon want to be?***

The only sustainable path forward is one that has community buy-in. By asking the question of who Lebanon wants to be, recommendations for the future were created.



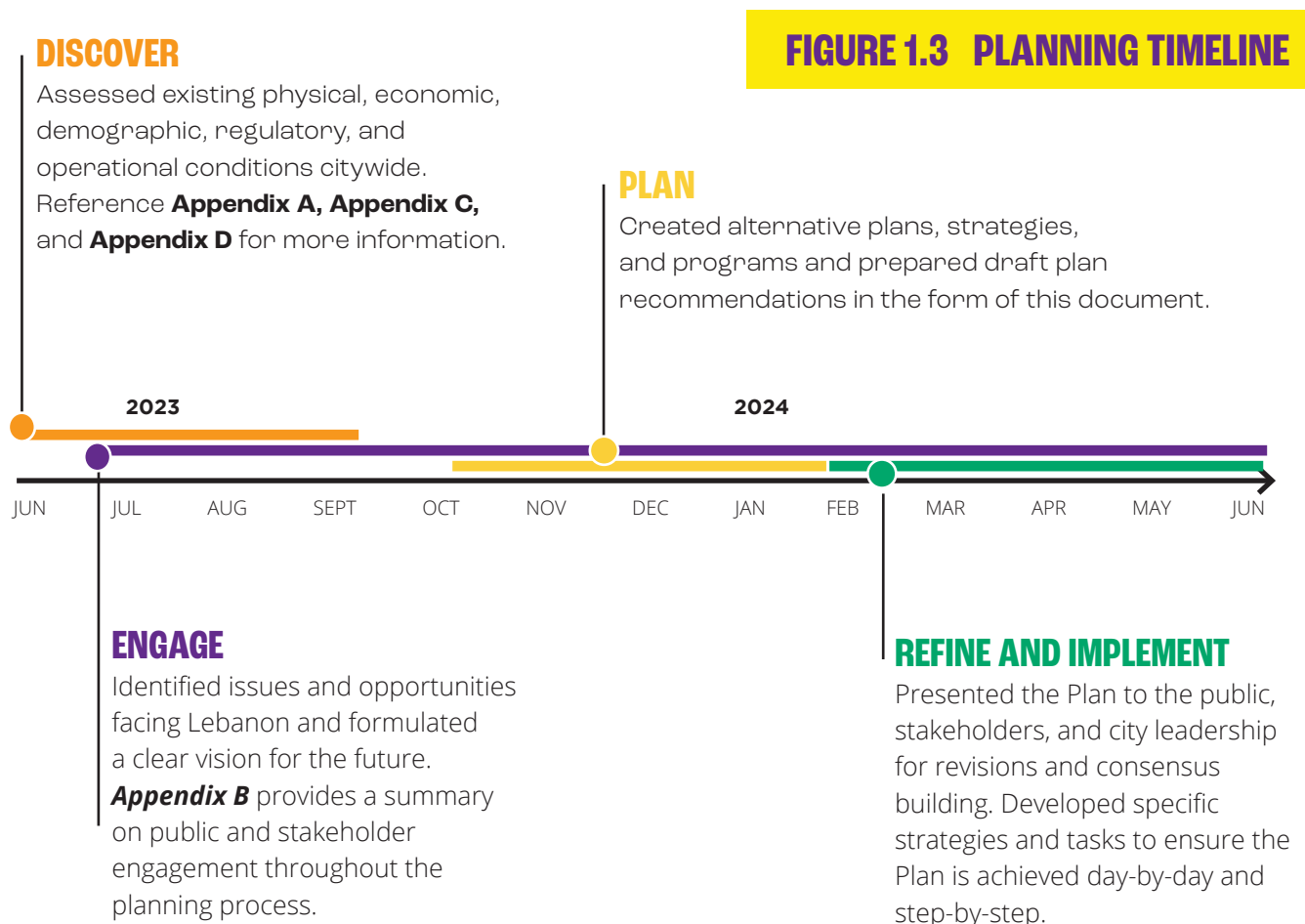
## ***How do we get there?***

This is ultimately what the Plan answers. This Plan offers a road map to the future, outlining goals and strategies that keep elected and appointed leaders and city staff members on track to make Lebanon what the community needs and wants.



# PLANNING PROCESS AND TIMELINE

The Plan development process took approximately twelve months and consisted of five primary phases: *Discover*, *Engage*, *Plan*, *Refine*, and *Implement*. From *Discover*, where a baseline of Lebanon was developed; to *Engage* where the community shared its voice; to *Plan* and *Refine* when the actual road map for the future of each of the Plan's topics were recorded; to *Implement* when the Plan is put to work for the community. **Figure 1.3 Planning Timeline** demonstrates the planning process timeline.



## PLAN ORGANIZATION

This Plan is organized into seven sections and four appendices. The first two sections introduce the Plan and its structure. **Section 1** explains how the Plan came to be, why it is necessary, and how it should be integrated into daily decisions. **Section 2** describes the vision and values that set the tone and theme for the goals, strategies, and implementation.

**Sections 3** through **5** provide the Plan's recommendations as they relate to future land use; growth and development patterns; transportation and connectivity; parks, recreation, and open space; and social health and equity patterns on an individual and community-wide scale. These sections are where the recommendations exist to guide Lebanon as the city works to make this Plan's vision a reality.

**Section 6** outlines the city's action plan when it comes to carrying out community goals. Action by action, it describes what the task at hand is, who is responsible for participating in its successful completion, what timeline the task should be completed within, and what values it supports.

Lastly, the appendices cover detailed background information that was considered comprehensively to form the Plan. The four appendices include an inventory and analysis of existing conditions (**Appendix A**), a full recap of public engagement events and findings (**Appendix B**), summaries of existing plans and studies, and descriptions of how each relates to this Plan (**Appendix C**), and the complete Economic and Market Analysis report that was used to understand existing economic and market factors at play in and around Lebanon (**Appendix D**).

## KEEPING THIS PLAN FRESH

This Plan should be reviewed and revised periodically to respond to shifts in economic and demographic conditions, new changes in state and federal law, the impacts of existing policies and past decisions, and new implementation tools or resources that would benefit outcomes. At least once a year, the Planning Commission should review or reconsider the Plan or portions of the Plan and may propose amendments. Without regular evaluation and monitoring of the Plan's progress, the Plan will lose its effectiveness in achieving and upholding a shared vision for Lebanon.



# HOW TO USE THIS PLAN

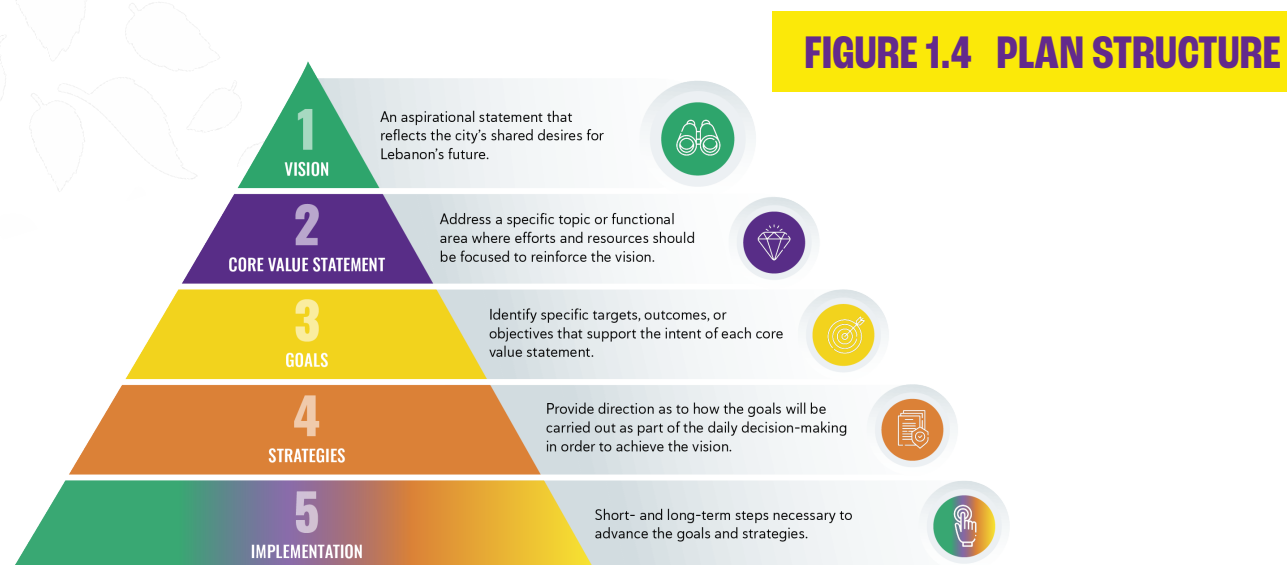
This Plan is intended to be a living document and reference point for the city. As city staff members, elected leaders, and community members make decisions for Lebanon, this Plan serves as the lens through which they consider the appropriateness of proposed changes. This Plan serves as the road map toward Lebanon's determined vision for the future through the development decisions, zoning changes, and community modifications that face the city. Part of the review process for such changes includes ensuring alignment with the comprehensive plan, which works to safeguard the city's established long-term goals through short-term decisions.

While it was compiled as a reflection of current conditions using the public and stakeholders' interests in the community at the time, the Plan establishes a broad policy foundation to guide future growth and reinvestment in Lebanon for years to come.

This Plan is used to:

- Establish a strategic vision for the future of Lebanon.
- Provide policy guidance for elected and appointed officials when making decisions that affect the long-term needs of the community.
- Help guide city staff members' day-to-day decision-making regarding the location, intensity, and design of future development.
- Inform residents, property and business owners, developers, and others interested in Lebanon's priorities and expectations for development.
- Maintain an implementation strategy (**Section 6**) that helps achieve the community's vision for Lebanon.

This Plan uses a variety of terms in its structure, including vision, guiding principle, goal, strategy, and framework plan. Reference **Figure 1.4 Plan Structure** to understand what these terms mean and how they work together.



**[PAGE INTENTIONALLY LEFT BLANK]**

## SECTION 2 CONTENTS

VISION

CORE VALUES



# VISION AND VALUES

**Section 2** provides describes the consensus-built vision and core values of Lebanon that are the backbone of the goals, strategies, and framework plans within this Plan. The vision and core values were developed based on the input gathered throughout the public engagement process on the issues, concerns, and opportunities facing the city, as detailed in **Appendix B**.

# LEBANON'S VISION

A vision statement is an aspirational statement that describes an idealistic future. It states what a community is most hopeful to be and achieve in the long term without getting into the specifics of how it will be accomplished. Lebanon's vision statement answers important questions about what the community cares about, who in their population they want to serve, and what impact they hope to have on their residents, visitors and community.

**“LEBANON IS A FAMILY-FRIENDLY COMMUNITY OF ALL AGES, STRIVING TO PROVIDE EXCITING RECREATIONAL AND PROFESSIONAL OPPORTUNITIES THROUGH CONNECTED PLACES FOR RESIDENTS AND VISITORS.”**

## CORE VALUES

Core values are defined principles that are of central importance to the Comprehensive Plan. While Lebanon is made up of multiple individuals. It is important to define the community's values. Communitywide values and any given community member's individual values may be similar, but it is important for a community to work together to determine what they value as one community.

The core values of a city facilitate decisions and underline all actions; they are the core pieces to how the community of Lebanon sees itself and where it wants to go in the future. Core values educate current and future residents (and those interested in investing in a community, such as a developer) and leaders about the community's identity.

Lebanon's community core values should be considered when the city is making decisions regarding, policies, developments, investments, and more. Note the core values are not listed in order of importance.

The vision and Plan are supported by the following three values. These values create a framework that all recommendations and goals refer to - essentially informing all aspects of the Plan. These values were developed with community feedback and approved by public engagement. At the heart of each value is the assertion that the City of Lebanon seeks to best serve its community members.



## LOCAL CULTURE AND COMMUNITY BUILDING

**A PLACE CALLED HOME....**Lebanon aspires to build on existing traditions and cultures, providing new opportunities for the community to gather, connect, and celebrate. This may include festivals, parades, street fairs, and public events. Lebanon will also continue to maintain its hometown feel. relationships between its community members This value indicates that a recommendation or goal further develops Lebanon's hometown feel, ensuring that residents come first. Additional housing styles and opportunities across income levels will help provide desperately needed housing.



## ECONOMIC DIVERSIFICATION AND VITALITY

**BUSTLING BUSINESS AND ECONOMY! ECONOMIC VITALITY AND PROFESSIONAL INTEGRATION....** Lebanon seeks to broaden its local economy and regional connections, providing new opportunities for its residents and attracting a thriving business culture. This includes a level of expansion and integration, providing professional development for young adults to grow their careers right here in Lebanon. We will revitalize the downtown, providing additional investment and support to business owners and residents.



## FUTURE FOCUSED

**DESTINATION, LEBANON!....**Lebanon is a crossroad in the Ozarks, acting as an integral point of access within the region; a place where people visit, play and stay! The community will work to improve active transportation options so that pedestrians and bicyclists are able to move about the city, connecting the local community while also attracting visitors for recreation. Visitors will know our community for its inclusive atmosphere with activities for ALL.

**[PAGE INTENTIONALLY LEFT BLANK]**

## SECTION 3 CONTENTS

GOALS AND STRATEGIES

CRITICAL ISSUES

GROWTH FRAMEWORK

FUTURE LAND USE FRAMEWORK



# LAND USE AND DEVELOPMENT FRAMEWORK

**Section 3** provides guidance regarding the location, type, and character of future land use in Lebanon. It is a guide for staff members, city leadership, developers, and stakeholders, as well as a commitment to the community for how Lebanon develops its growth and future land use patterns.

# GOALS AND STRATEGIES

## Goal 3.1

**Develop and adopt a future land use plan that is flexible to market trends, and guides future development, redevelopment, and revitalization projects while balancing a mixture of uses.**

### **Strategy 3.1.1 Future Land Use Framework**

Support development patterns and zoning regulations that expand growth and opportunities for Lebanon per **Figure 3.2 Future Land Use Framework**. Consider revisions to the Code of Ordinances to support uses set forth in **Figure 3.2**.

### **Strategy 3.1.2 Infill and Redevelopment**

Support the redevelopment of vacant/underutilized sites, surface parking lots, and buildings. Focus higher density infill and redevelopment in areas along major transportation corridors in proximity to retail hubs, particularly, but not limited to Jefferson Avenue and Commercial Street.

## Goal 3.2

**Pursue strategic annexations (ideally if/when mutually beneficial to the property owner and city).**

### **Strategy 3.2.1 Purposeful Growth**

Where appropriate, explore opportunities for property annexation in line with **Figure 3.1 Development and Redevelopment Framework**. Annexation allows formerly unincorporated properties to receive municipal services. Controlled annexation can yield a more logical land use development pattern, permitting additional variety of land uses and more efficient connectivity.

### **Strategy 3.2.2 Annexation Recommendations**

Compile a report that clearly summarizes the need for additional land within city boundaries to communicate the purpose, and justification for growth.

## Goal 3.3

### Expand housing choices and opportunities.

#### **Strategy 3.3.1 Mixture of Housing Types**

Ensure the Future Land Use Framework (see **Figure 3.2**) and Code of Ordinances provide opportunities for a mixture of housing styles largely including single-family and some multi-family options at varying densities and price points.

#### **Strategy 3.3.2 Existing Housing Stock**

Support the retention of and rehabilitation of existing housing stock as a core component of the affordable and attainable housing supply in the region.

#### **Strategy 3.3.3 Regional and Federal Housing Initiatives**

Work with regional and federal partners, including local and regional housing authorities, to provide safe, stable, and attainable housing through updates to education and outreach, allocation of resources, and targeted updates to codes and regulations.

## Goal 3.4

### Develop and adopt a downtown master plan.

#### **Strategy 3.4.1 Funding**

Identify funding for a downtown master plan in partnership with the Downtown Business District to provide specific and detailed guidance for downtown Lebanon. A downtown master plan is the guiding policy document that contains the vision for the continued future of downtown Lebanon.

#### **Strategy 3.4.2 Scope of Services**

Prepare a scope of services for a downtown master plan that includes target industry sector analysis, land use planning, economic development goals and policies, stakeholder and public engagement, analysis of connectivity and accessibility, streetscape enhancement concepts, and design guidelines.

#### **Strategy 3.4.3 Public Engagement**

Develop a downtown master plan with robust stakeholder input, inclusive public engagement, and both in-person and virtual engagement opportunities.

#### **Strategy 3.4.4 Implementation and Community Improvement District**

Following adoption of the downtown master plan, pursue creation of a downtown community improvement district to create a funding source for downtown improvements and plan implementation.

## Goal 3.5

### Support a diverse and stable economy that is resilient to economic stress.

#### Strategy 3.5.1 Business Retention and Attraction

Attract and retain business clusters that will create a resilient business culture by proactively selecting building sites for future businesses and making them shovel ready; working with the Lebanon Chamber of Commerce to strengthen and expand business retention strategies; and using economic, technical, and administrative incentives to create a business-friendly environment for existing and new businesses.

#### Strategy 3.5.2 Access to Funding

Work with regional economic partners and the private sector to identify ways to increase funds available to support the growth of local businesses and the creation of growth of new businesses.

#### Strategy 3.5.3 Economic and Market Analysis

Use the Economic and Market Analysis (see **Appendix D**) to guide development decisions and create incentives for target industries.

## Goal 3.6

### Optimize opportunities for parks, open space, and other recreational amenities.

#### Strategy 3.6.1 Development Requirements

Incorporate open space and natural resources access into future development, redevelopment, and revitalization projects.

#### Strategy 3.6.2 System Maintenance

Protect the long-term health of parks, open space, sidewalks, and pathway systems through regular maintenance and monitoring issues over time to address changing community demands and needs.

#### Strategy 3.6.3 Indoor Recreational Facility

Design and construct an indoor sports complex that provides versatile and inclusive space for all ages and abilities to foster community health, wellness, recreation, and economic development.

#### Strategy 3.6.4 Funding Mechanisms

Identify and secure a range of funding sources that will enable the implementation of development and maintenance as opportunities arise.

# CRITICAL ISSUES

The following is a list of critical issues related to Lebanon's existing land use and development. These critical issues were derived from the existing conditions analysis, and stakeholder and public engagement.

- Lebanon's economic base lacks diversity
- Housing type diversity and affordability is lacking
- Lebanon lacks family-friendly entertainment options
- Code enforcement is inconsistent or lacking
- Infill development and redevelopment are needed along Commercial Street and along south Route 66.
- Newer development is desired along east Elm and Millcreek Road

Lebanon stakeholders and community are invested in the success of the city and have a great vision for Lebanon to rectify the detailed issues. Future land use and development is a critical factor in bringing the vision and values to life community wide.



# GROWTH FRAMEWORK

Given Lebanon's infrastructure, topography, highway access, and existing land use patterns, over the lifetime of this Plan (20 years), urban expansion will favor the southeast, southwest, and northwest quadrants of the city. Growth, in the context of this Plan, means thoughtful, measured progressive, and meaningful development that achieves the community goals. Future development must focus on quality over quantity. **Figure 3.1 Development and Redevelopment Framework** identifies the realization of development, redevelopment, and revitalization for Lebanon.

Opportunities in Lebanon are varied, ranging from continued downtown revitalization to residential growth to commercial and industrial opportunities.

## RESIDENTIAL DEVELOPMENT

New residential housing development is a focus of this Plan. Continued development of **single-family residential** neighborhoods at the periphery of the city at locations currently serviced with roads and utilities should be targeted. The northwest and southern portions of Lebanon will continue to be dominant locations for new home construction. Meanwhile, **multi-family** residential developments are best located along major arterial corridors, close to employment and retail, and infill locations within mature neighborhoods.

## INDUSTRIAL AND COMMERCIAL DEVELOPMENT

Generating employment opportunities and development should be a priority to support population growth and economic development. Industrial, commercial and employment type uses are best suited along the Interstate 44 corridor.

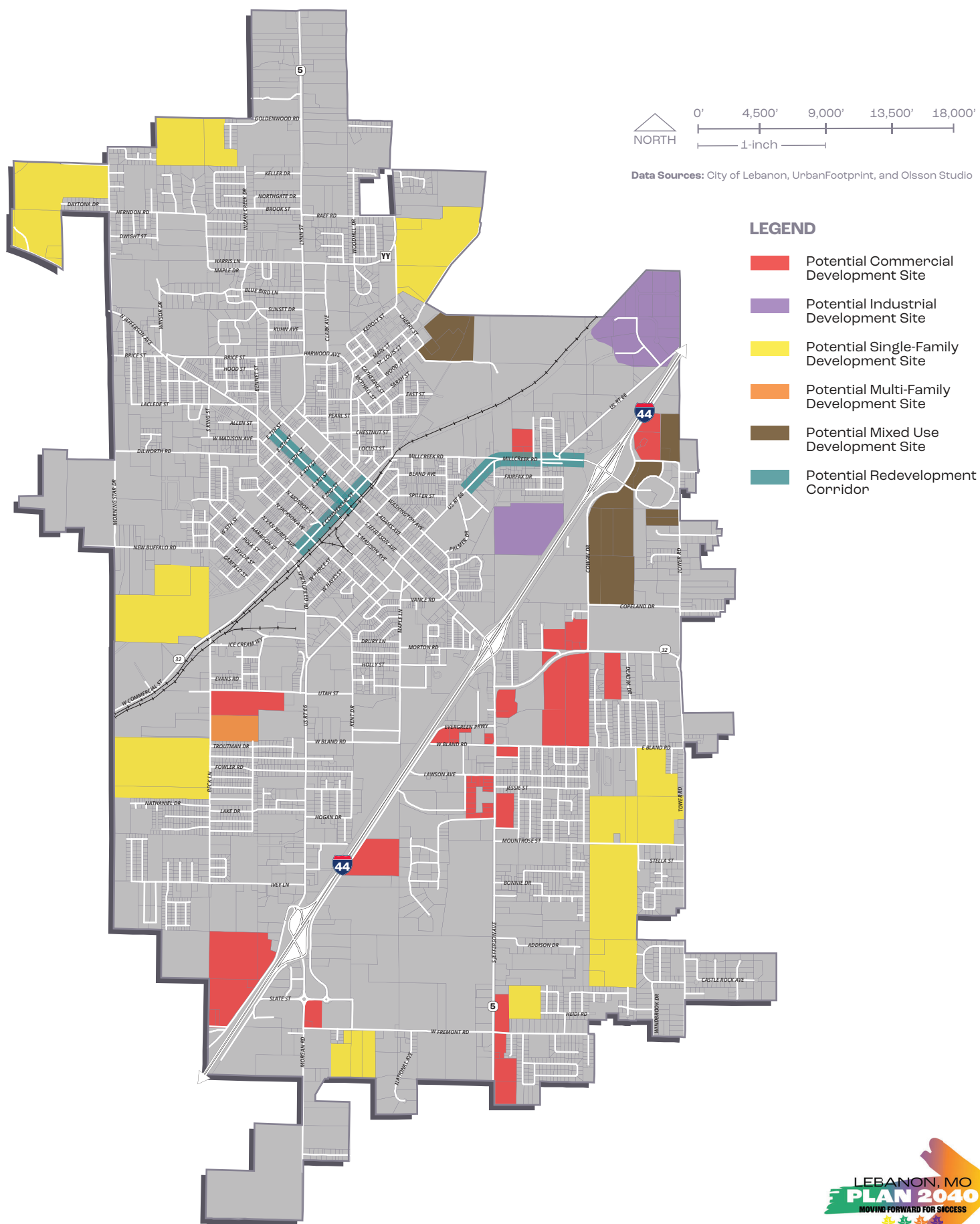
Continued population growth will increase the need for additional professional office space in Lebanon. The presence of Mercy Hospital and Lake Regional Lebanon Campus will generate the future need for additional medical office buildings. Lebanon should promote itself as a regional medical destination.

## DOWNTOWN DEVELOPMENT

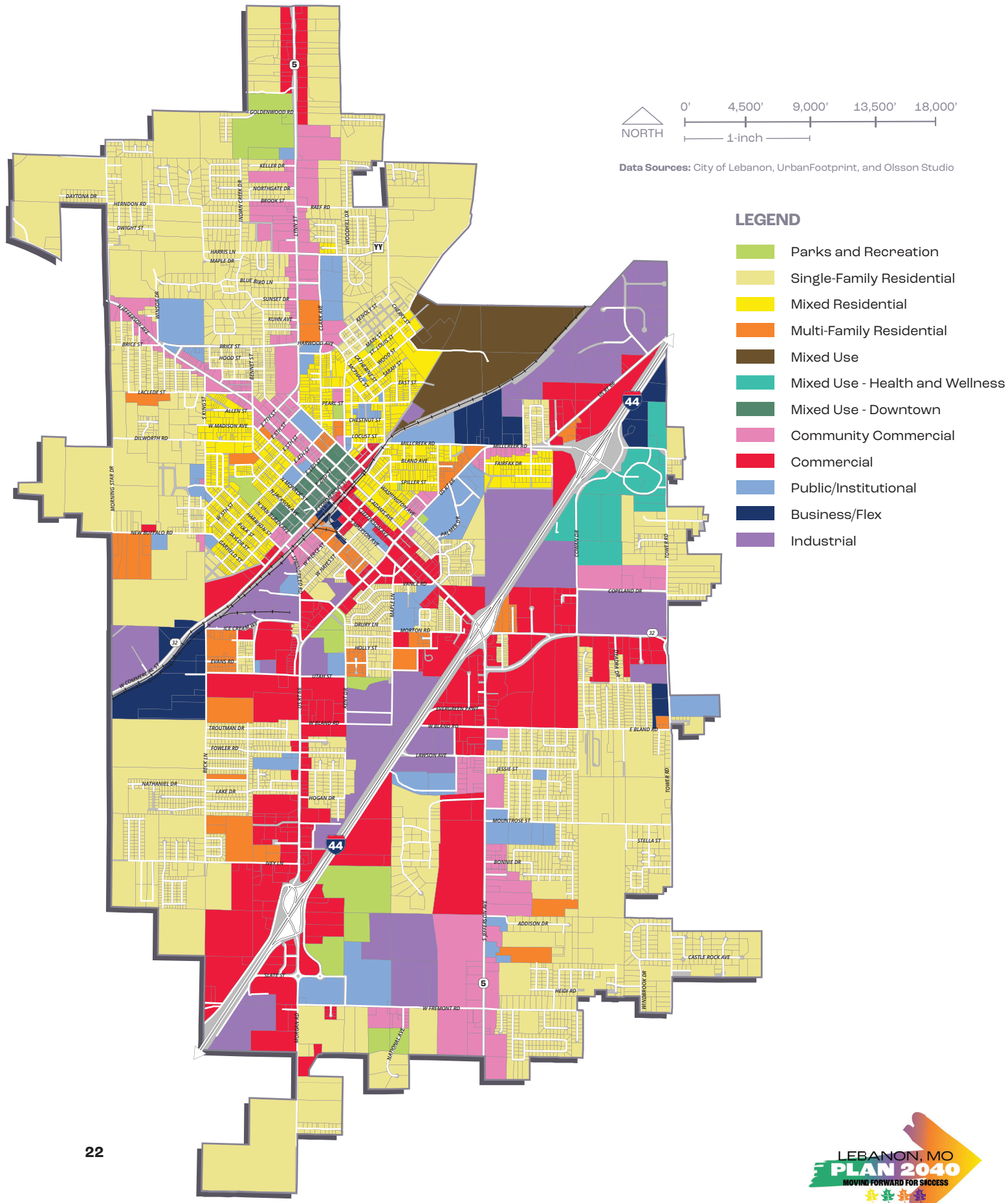
Downtown will continue to support redevelopment activity featuring retail, office, mixed use, and infill housing. Future efforts should focus on providing entertainment, community events, and a public gathering space. The Commercial Street corridor in downtown Lebanon is ideal for future retail and mixed-use development.

Residential housing units in downtown should be a priority with potential housing types including upper floor apartments as part of mixed-use development along Commercial Street and infill single-family and small-scale multi-family housing on vacant land and under-utilized properties along 2nd Street.

**FIGURE 3.1 DEVELOPMENT AND REDEVELOPMENT FRAMEWORK**



# FIGURE 3.2 FUTURE LAND USE FRAMEWORK



# FUTURE LAND USE FRAMEWORK

Future land use patterns for Lebanon are based on community input, city staff member and leadership guidance, the economic and market analysis, and planning best practices. Together these factors directed **Figure 3.2 Future Land Use Framework** and created the Future Land Use Framework Plan, which will guide future land use decisions as development and redevelopment opportunities as they present themselves to the city and leadership.

It is important to note that future land uses and categories are not zoning classifications. Future land uses are a guide to ensure the city can achieve its long-term vision through short-term decisions, whereas zoning is regulatory.

## PARKS AND RECREATION

Parks and Recreation represent public lands dedicated to parkland, including neighborhood, community, and regional facilities. This use includes open space, playgrounds, gardens, greens or lawns, meadows, woods or trees, ponds or streams, walkways and paths, fountains, civic plazas, shelters and picnic areas, and amphitheaters and performance space. It also includes areas utilized for sports, active play, and recreation uses, including sports fields and courts, sport facilities, adventure play, bicycle facilities, and museums. Parks and Recreation can include accompanying infrastructure, such as spectator facilities and seating, support and maintenance facilities, concessions, restrooms, meeting rooms, landscaping, and parking.



## SINGLE-FAMILY RESIDENTIAL

Single-family residential represents the traditional residential style, detached residential use on a lot, typically in a subdivision. This land use category does not include attached units. It includes a variety of lot and home sizes with lots and homes. Lots are arranged in a variety of layouts including gridded blocks, modified grids, curvilinear streets, lot clusters, and cul-de-sacs. Setbacks vary, with front setbacks accommodating a driveway and front yard. This use is found in both a single-family neighborhood and an infill residential style that can be used to fill in gaps around higher density areas of a community (such as the downtown).

Single-Family Residential should include sidewalks on one or both sides of the street. Trees – on the property or on-street – play an important role in establishing quality and character and are therefore required. The neighborhood should include mobility amenities, such as shared use paths, and may include amenities private to the development, including swimming pools, parks, playgrounds, and general open space. These neighborhoods should be connected to the overall parks, open space, and sidewalk system.



## MIXED RESIDENTIAL

The Mixed Residential is a residential neighborhood that allows for a mixture of single-family detached housing lots, as well as complementary, small-scale, and low-density attached housing, including townhomes, row homes, duplexes, and live-work units. It is a transitional neighborhood that provides a buffer between traditional subdivision-oriented single-family neighborhoods to more intense uses, such as multifamily residential, commercial corridors, or mixed uses. Additionally, it provides housing choice in a lower density, mixed residential neighborhood. A specific percentage of housing format mixture is not provided due to variability; however, single-family uses would typically account for the largest percentage of residences in the use.

Like Single-Family Residential, Mixed Residential lots are arranged in a variety of layouts including gridded blocks, modified grids, curvilinear streets, lot clusters, and cul-de-sacs. Setbacks vary, with front setbacks accommodating a driveway and front yard.

Mixed Residential neighborhoods should include sidewalks on one or both sides of street. Trees – on the property or on-street – play an important role in establishing quality and character and are therefore required. Mixed Residential neighborhoods should be connected to the overall parks, open space, and trail system in the city somehow.



## MULTI-FAMILY RESIDENTIAL

Multi-family Residential represents a neighborhood or style of housing that is made up of attached housing, including townhomes, row homes, duplexes, triplexes, quadplexes, and apartments. In many cases, several multi-family buildings are located on a single site. Multi-family Residential should be concentrated along transportation corridors and nodes, in and around the downtown area, and where there is a cluster of destinations, including retail, dining, entertainment, employment, recreation, and parks. This use serves as a buffer between major transportation corridors, industry, commercial uses, and less intense residential uses. Character and style can be extremely varied and should focus on longevity, community desires, and area fit. Design at the street level is important, as is the site planning to handle parking, landscape, buffering, screening, amenities, retaining walls, and stormwater control.



# MIXED USE

Mixed Use contains a variety of land uses developed together in a coordinated manner. The mix can be horizontal, vertical, or hybrid mixed use, meaning:

- **Horizontal Mixed Use.** This mixed use style features side-by-side uses, such as a retail building next to multi-family living. Each use is on its own respective site with shared parking, pedestrian connectivity and overall site design/aesthetic.
- **Vertical Mixed Use.** This mixed use style refers to stacked uses, such as ground floor retail and second floor office and third and fourth floor living units.
- **Hybrid Mixed Use.** This represents a blend of both horizontal and vertical mixed use.

Mixed Use allows for flexibility of uses that fit the area while unifying those elements and providing shared amenities. Mixed Use provides the opportunity to concentrate people, employment and service needs in a given location, while sharing infrastructure, transportation, parking, and a unique user experience. Mixed Use development patterns should be concentrated in the downtown area and along major transportation corridors and their intersections.

Within the Mixed Use Category two designated district types have been identified that best suit the needs and desires of the Lebanon community. Conceptual images for these districts have been created to illustrate the potential development for reach of these areas. These illustrative graphics shown are initial concepts and further studies and design are necessary to move these ideas forward.



## MIXED USE - HEALTH AND WELLNESS

This category – which makes up the Mercy Hospital area located at Interstate 44 area from Millcreek Road to Copeland Drive – focuses on creating a district of health and wellness, and personal care uses. Uses in this district include medical clinics, yoga studios, cafés, bistros, coffee shops, estheticians, salons, spas, counseling services, mental health services, etc.

This district should include multiple uses within a given site as a master planned development or planned mix of uses from inception. The use types while varying (horizontal, vertical, or hybrid) should complement one another in arrangement, design, and function to develop a cohesive place of differing uses. Site design for Mixed Use – Health and Wellness should include shared sidewalks, public open spaces or parklets, parking, internal connected road systems, and primary development entries should be incorporated to establish a district or center feel. Access to this district should be from a collector or arterial road. Mixed Use – Health and Wellness allows for complementary land use types including Multi-Family Residential, Community Commercial, and Commercial, along with a mixture of development, redevelopment, and infill.



## MIXED USE - DOWNTOWN

This category – which makes up the downtown core – focuses on creating a vibrant and cultural hub with dining, entertainment, and public spaces. Uses in this district include cafés, bistros, restaurants, bars/speakeasies, event venues, public plazas, food truck parks, etc. Development of this district should be a part of a Downtown Master Plan. The use types while varying (horizontal, vertical, or hybrid) should complement one another in arrangement, design, and function to develop a cohesive place of differing uses. Site design for Mixed Use – Downtown should include programmable public open spaces or parklets, streetscape enhancements, wayfinding, and signage to establish a district or center feel. Mixed Use – Downtown allows complementary land use types including Multi-Family Residential, Community Commercial, and Business/Flex, along with a mixture of development, redevelopment, and infill.



## COMMUNITY COMMERCIAL

Community Commercial provides commercial, retail, service, and office use to the immediate surrounding neighborhoods. Found at key neighborhood intersections, the use is often a single corner pad site or a modest in size and scale single strip center. It often includes service uses mixed with convenience uses, and may include specialty, boutique, unique, one-of-a-kind, or small office uses.

The character of Community Commercial includes single-story buildings that are in a style and material mixture that are compatible with the surrounding residential neighborhoods. Sites should include landscape, buffered side and rear yards, sidewalks, and connectivity to the sidewalk system. Any accompanying service requirements are screened and/or in an enclosure. Parking requirements are modest due to the scale and size of the use (when compared to Community uses).



## COMMERCIAL

These uses are commercial and business in nature, including retail, services, restaurants, office, and other non-industrial and commerce-based businesses. This land use category includes neighborhood retail centers, regional retail development, pad sites, standalone restaurants or retail, service providers, banks, lodging, and office uses.

Development size depends on the current market needs or specific needs of tenants, both of which change over time. The types of commercial entities offered should also consider the population served (e.g., neighborhood versus commercial). Critical considerations include access, visibility, topography, parking, infrastructure, proximity to customers, and transportation. Commercial uses provide sales of goods and services to consumers, are important employment centers, and provide for tax base diversification.



## PUBLIC/INSTITUTIONAL

Public and institutional uses consider public and semi-public uses that provides for the necessary functions of the community which include schools, faith organizations, cemeteries, public utilities, city or county buildings or facilities, public safety facilities, hospitals, etc. Size and site requirements depend entirely on use, as do access and parking requirements. Regardless of community facility type, appropriate buffers should be implemented between adjacent land uses and screening should be used for any exterior storage associated with the use.



## BUSINESS/FLEX

Business and Flex uses provide mixed use urban places that include offices, business parks, and limited retail and dining uses. Offices, studios, research facilities, and restaurants/bars are examples of appropriate uses. Light manufacturing may be appropriate where high-quality planned developments integrate a mix of office and light industrial uses. Business and Flex uses can attract a significant number of employees and visitors from outside of the community. These uses are designated along key road corridors, seeking to leverage transportation infrastructure and economic development potential.



## INDUSTRIAL

Industrial uses are intended for businesses focused on manufacturing, assembly, storage, warehousing, distribution, research and development, technology, service, transportation, raw materials handling and storage, outdoor storage and handling, repair and maintenance, and waste management. This land use classification considers both light industrial and general medium- to heavy-industrial uses.

Lot size demands vary specifically by business and operation type, although most demand flat sites and accommodations for larger areas under roofs or large storage areas or yards, and/or significant areas for access, movement, and turning of trucks. Market demands, availability, access to transportation, access to workforce, access to utilities and infrastructure, site development needs, and lot size are critical considerations.



**[PAGE INTENTIONALLY LEFT BLANK]**

## SECTION 4 CONTENTS

GOALS AND STRATEGIES

CRITICAL ISSUES

CONNECTIVITY FRAMEWORK



# CONNECTIVITY FRAMEWORK

**Section 4** provides guidance on the future connectivity within Lebanon. A balanced mobility network enhances economic development, quality of life, and equity, while balancing ongoing costs and maintenance. To address this, it is important to understand the community's long-term vision, how to leverage available resources to improve existing roadways, and where to preserve right-of-way infrastructure for potential growth and future needs.

# GOALS AND STRATEGIES

## Goal 4.1

### Maintain an accessible, safe, and efficient vehicular transportation system.

#### Strategy 4.1.1 Intersection Improvements

Using the recommendations in **Figure 4.1**, improve the overall safety and existing conditions at the identified intersections. Updates should focus on improving the efficiency and safety of the overall system.

#### Strategy 4.1.2 System Maintenance and Context-Sensitive Design

Prioritize maintenance and repair needs as well as the correction of existing deficiencies to maintain the quality and enhance the safety of the city's transportation system.

#### Strategy 4.1.3 Statewide Transportation Safety Initiatives

Show-Me Zero is Missouri's Strategic Highway Safety Plan aimed at eliminating fatalities and serious injuries on Missouri roadways. The Missouri Coalition for Roadway Safety recognizes that this goal requires a collaborative effort of diverse stakeholders working towards improving education, public policy, enforcement, engineering, and emergency response. The plan has implementation strategies for cities to increase safe driving conditions and work towards the statewide goal.

#### Strategy 4.1.4 Access Management Along Primary Corridors

Access driveways along primary corridors (e.g., Jefferson Avenue, Commercial Street, etc.) should be minimized to enhance safety for all modes, facilitate walking and biking, and reduce congestion.

## Goal 4.2

### Increase multimodal connectivity throughout the city.

#### **Strategy 4.2.1 Sidewalk Infill and Improvements**

Sidewalk improvements should be considered of the areas identified in **Figure 4.1** to provide safe pedestrian connections between city services and amenities. Multiuse pathways should be placed in areas that may support both bicycle and pedestrian connectivity.

#### **Strategy 4.2.2 Dedicated Bicycle Infrastructure**

Dedicated bicycle infrastructure increases safety for all modes of traffic. Bike lanes should be considered for the key corridors highlighted in **Figure 4.1** and potentially expanded over time to serve as multimodal transportation corridors.

#### **Strategy 4.2.3 Citywide Trail Connectivity**

Off-road trails separated from vehicular traffic corridors can serve a dual purpose as recreational amenities and multimodal transportation routes. Trails should be developed to provide connections to city services and amenities, including existing parks and trails. Development support from the Rails-to-Trails Conservancy is available and should be utilized as a resource, especially for potential trail development along the active rail corridor. Trailheads should be strategically placed for easy access to trail facilities.

# CRITICAL ISSUES

The following is a list of critical issues related to Lebanon's existing roadways and multimodal circulation network. These critical issues were derived from the existing conditions analysis, economic and market analysis, and stakeholder and public engagement.

- Residents feel that traffic congestion could be improved throughout the city.
- A potential bypass connecting north Lebanon from Highway 5 to Interstate 44 was consistently brought up in conversations throughout the planning process.
- More bicycle infrastructure is needed throughout the city; this could be on-street bike lanes or off-street bike trails.
- Stakeholders indicated a desire for an expanded trail network and more places to walk throughout the city.
- Multiple comments from stakeholders during the engagement period indicated that sidewalk improvements or additions were needed throughout the city, particularly near the high school; along Jefferson between 7th Street and Highway 5; Fremont Street to National Avenue; Rolling Hills Road; and Mountrose and Tower Road.



# CONNECTIVITY FRAMEWORK

In an increasingly interconnected and fast-paced world, the way we move and stay connected is vital to the success and well-being of communities. The transportation network works as a collective system to flow both vehicular and non-motorized traffic throughout the city. This Plan recommends improvements in key areas to enhance the overall system to benefit traffic flows, connectivity, accessibility, and safety. **Figure 4.1** on the following page illustrates these recommended mobility improvements, which affect vehicular, pedestrian, and bicycle travel.

## PROPOSED INTERSECTION IMPROVEMENTS

Intersections that are appropriately designed for current and projected traffic volumes across multiple modes of travel are an important factor of a safe, efficient transportation system. Intersection improvement projects should aim to decrease traffic accidents through infrastructure upgrades, additions, and/or realignment of travel lanes. Emphasis should also be placed on pedestrian safety features, such as signalized crossings and separation from vehicular traffic lanes wherever possible. The following list of intersections are proposed for improvements:

- Mill Creek Road and Cowan Drive
- East Bland Road and Tower Road
- South Jefferson Avenue and West Fremont Road
- Ivey Lane and Elm Street

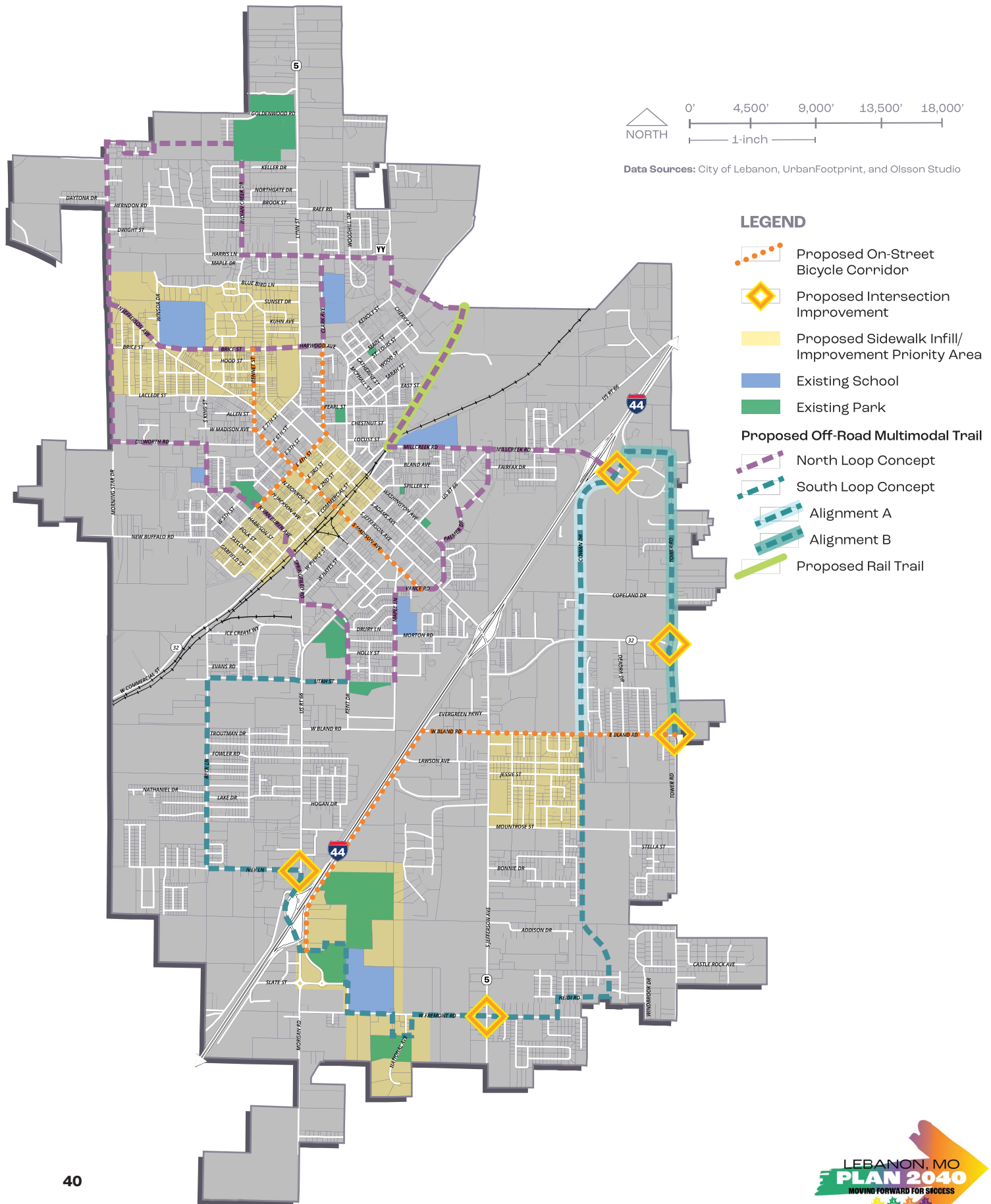
## MULTIMODAL IMPROVEMENTS

A multimodal network is a complex system that includes both the vehicular network, pedestrian network, available trails, and bicycle infrastructure. The system is a comprehensive overview of a community's general mobility, providing multiple options to users depending on their mode of choice.

The recommended multimodal connections are broken into two categories: on-street and off-street connections. On-street connections may consist of facilities such as cycle tracks (highly protected facilities) down to share streets (unprotected facilities). Off-street facilities include multi-use paths, trails, and separate facilities. The goal of these connections is to provide a network of available, reliable, and safe infrastructure for both pedestrians and bicyclists.

These bicycle and multimodal facility design requirements consider the impact of multiple aspects within and adjacent to facilities right-of-way, including typical section widths, profiles, drainage, lighting, landscaping, barriers, striping, utility relocation, snow storage, maintenance responsibilities, interagency coordination and planning, municipal approval, funding cost participation, and others. It is important to consider many of these aspects early on in the scoping, planning, and design phases to ensure the best outcome. It is important that multimodal design is not considered an “add-on” or “after-thought.”

# FIGURE 4.1 CONNECTIVITY FRAMEWORK



## ON-STREET IMPROVEMENTS

The network of on-street facilities should typically be on roadways that are slow and wide enough to provide a sufficient feeling of safety for all users. The appropriateness of facility selection should be determined based upon factors such as traffic volumes, vehicle speeds, public input, roadside context, and available right-of-way. On-street facilities could be made appropriate for many existing roadways throughout the city through possible lane reconfiguration (e.g., four lanes to three lanes), lane narrowing (e.g., 16-foot travel lane to 10-foot travel and six-foot bike lane), parking reduction (e.g., parking on both sides to parking on one side), or traditional roadway widening.

### Bike Lanes

Dedicated bike lanes allow for a visual and physical delineation of space between vehicles and on-street bicycles. These lanes can be simply marked with painted lines, or they can be more complex with added barriers such as bollards. Depending on the level of service of vehicular traffic and available funding, these delineations could be varied throughout the corridor.

As indicated by **Figure 4.1**, there are certain streets that have been proposed to include on-street bike lanes, forming a corridor for bicyclists. These include the following routes:

- Bennett Street to South Madison Avenue until Vance Road;
- The corner of East 4th Street and North Van Buren Avenue until Washington Avenue;
- Along Clark Avenue starting at Harwood Avenue until Washington Avenue;
- E Bland Road from Interstate 44 to Cowan Drive;
- Evergreen Parkway, along Interstate 44 until the south interchange.

These improvements, when paired with some of the multimodal improvements, would create a more robust network that would span a significant portion of the city.

## OFF-STREET IMPROVEMENTS

Off-street facilities, like on-street, should be chosen based on a variety of factors including safety, connection to land use, gaps, logical routes, available right-of-way, and overall feasibility. These may include sidewalks, share-used trails, hiking or walking trails, or mountain bike trails.

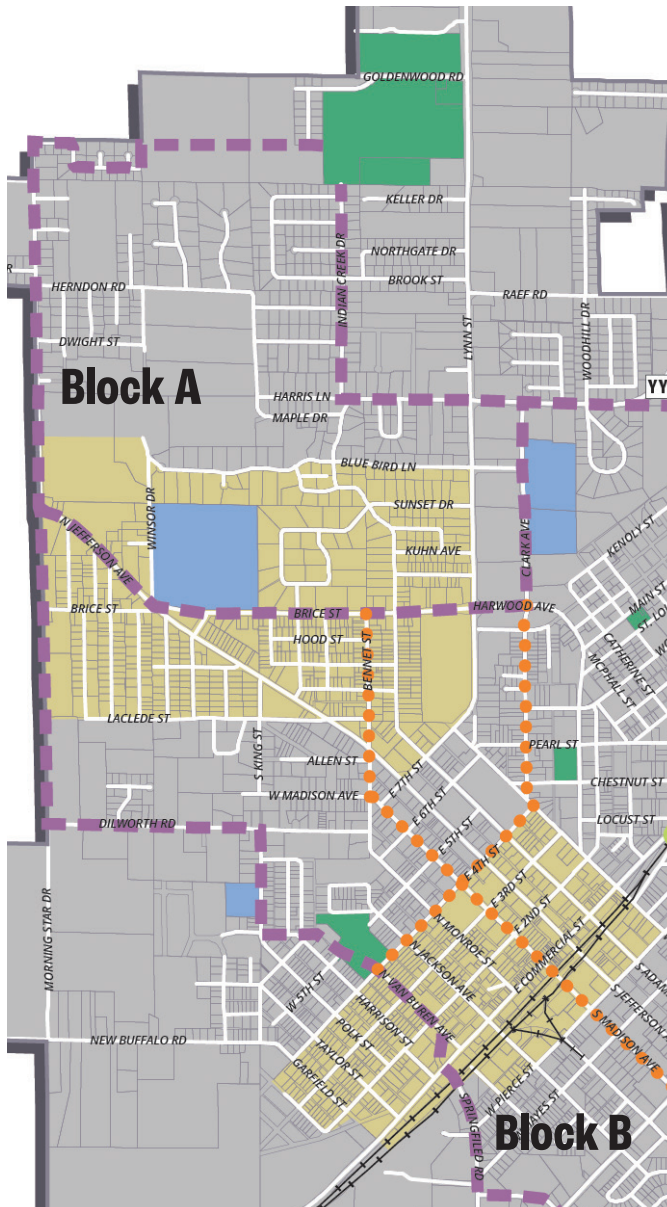
Off-street improvements are shown in **Figure 4.1** and described below.

### Pedestrian Sidewalk Network Improvements

A complete pedestrian network allows pedestrians to arrive at their destination safely and comfortably. Sidewalks are complete and in good condition. An excellent pedestrian network will also include clearly marked crosswalks that are ADA compliant, traffic signals that are well-timed, median buffers when multi-lane roadways are present, and detached sidewalks when possible. All of these characteristics are options when improvements to a pedestrian network are being made.

**Figures 4.2 and 4.3** identify areas for sidewalk infill opportunities or improvement priority areas. There are four main areas identified within the plan.

## FIGURE 4.2 PEDESTRIAN SIDEWALK IMPROVEMENT PRIORITY AREA



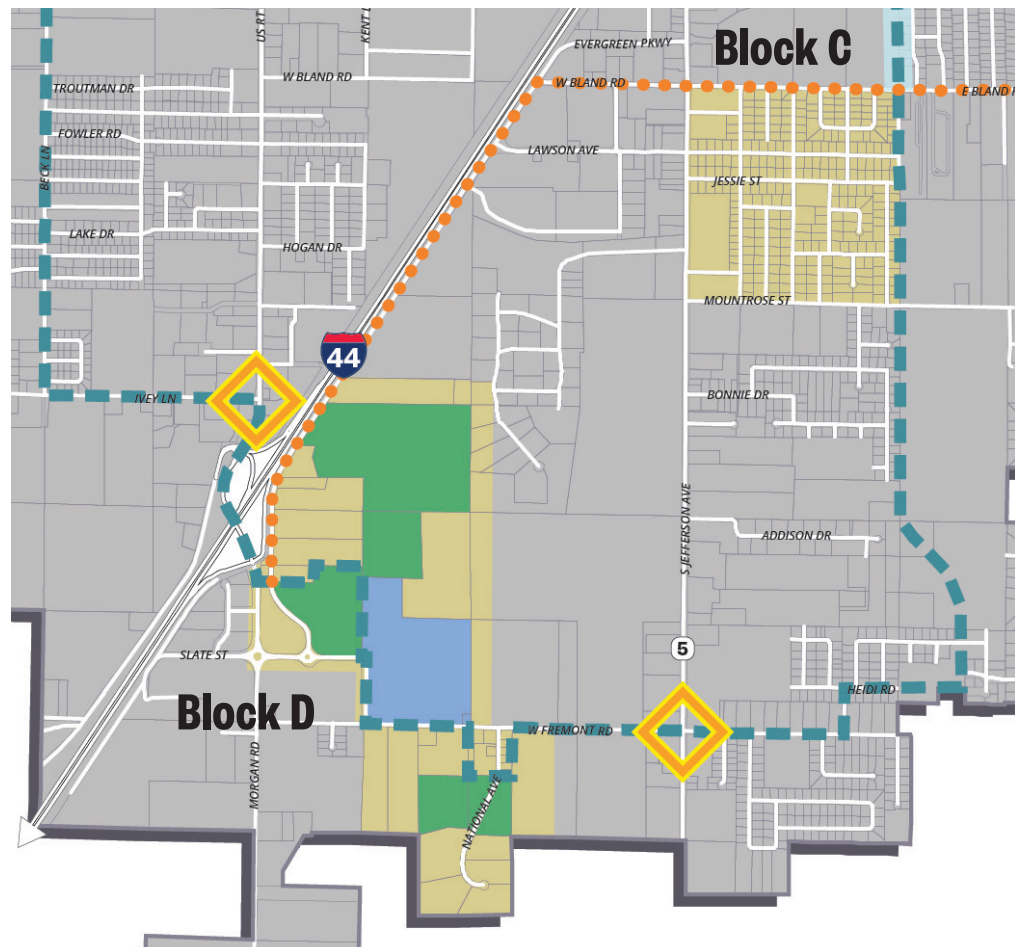
### Block A

Block A is situated in the northern portion of the city and is centered around Lebanon High School. It stretches from the western city limits past Weaver Street to Lynn Street in the east and Blue Bird Lane in the north to Laclede Street in the south. Block A also includes portions of the proposed on-street bicycle corridors and North Loop Concept. All of these factors combined will be a huge advantage for high school students and the local neighborhoods.

### Block B

Block B is centralized around the downtown area and along East Commercial Street. It stretches from East 4th Street to West Pierce Street in the southeast. Improvements made to this block will greatly benefit the pedestrian network through the downtown area and adjacent streets. Portions of the North Loop Concept and the proposed on-street bicycle corridors are present within this block.

**FIGURE 4.3 PEDESTRIAN SIDEWALK IMPROVEMENT PRIORITY AREA**



### Block C

This block is located in the southwestern portion of the city and is defined by West Bland Road to the north, Mountrose Street to the south, and South Jefferson Avenue to the west and Cowan Drive to the east. This block is characterized by single-family residences and has proposed on-street bicycle lanes and the South Loop Concept on its perimeter.

### Block D

The most southern block within the city, Block D comprised a portion of land that runs along Interstate 44 until the southern city limit. Coleman Memorial Conservation Area, Harke Park, Nelson Park, and Lebanon Middle School are situated within its boundaries. Improvements made to the pedestrian network would benefit local middle school students and help provide access to the local parks.

## MULTIMODAL TRAILS

In addition to the proposed on-street bicycle corridors, intersection improvements, and pedestrian improvements, **Figure 4.1** proposes two off-road loop trail concepts and a rail-trail concept along the active rail line to enhance connectivity in and around Lebanon. Each of these concepts suggest that infrastructure improvements of some kind should be considered for these areas. This may be adding a detached or attached sidewalk, a trail along the street, or a connection along the loop.

While some of these recommendations may take time to complete due to financial or other constraints, these concepts will provide a more cohesive network for a full variety of modal options for residents and visitors alike. In addition, these multimodal connections can be further enhanced by connecting to regional networks.

### North Loop Concept

The North Loop wraps around the northern portion of Lebanon, making its way along several arterial streets and connecting prominent locations within the city. The North Loop connects to Atchley Park, Lebanon High School, Joe D. Esther Elementary School, KVC Missouri Academy, Gasconade City Park, Boswell City Park, Maplecrest Park, Maplecrest Elementary School, and Mark Twain School. The North Loop also connects to Downtown Lebanon. The implementation of this concept would provide an increased level of mobility throughout the northern portion of the city. The North Loop would connect to the South Loop at Utah Street and Kent Drive and Cowan Drive and Millcreek Road.

### South Loop Concept

The South Loop is primarily located south of Commercial Street and is connects to the North loop at Utah Street and Kent Drive and Cowan Drive and Millcreek Road. It connects Maplecrest Park, Coleman Memorial Conservation Area, Nelson Park, Harke Park, and Lebanon Middle School. Within this concept, there are two alignment options: Alignment A and Alignment B. Both of these alignment options are located in the eastern portion of the south loop.

Alignment A starts at East Bland Road to the south and stretches north along Cowan Drive until Mill Creek Road. This option connects to one of the proposed on-street bicycle corridors, East Bland Road, and Block C of the proposed sidewalk infill/improvement priority areas.

Alignment B starts at East Bland Road to the south and follows Tower Road north until Mill Creek Road. This option connects to one of the proposed on-street bicycle corridors, East Bland Road.

### Rail-Trail

A rail-trail is a multimodal corridor that utilizes the existing right-of-way along an abandoned rail corridor. Rail-trails are an efficient use of space, taking advantage of a historically well-connected transportation corridor that has previously been leveled and cleared for rail use. A portion of the proposed North Loop concept runs along the inactive rail line just northeast of the downtown area.

## SECTION 5 CONTENTS

GOALS AND STRATEGIES

CRITICAL ISSUES

AESTHETICS AND CHARACTER  
FRAMEWORK



# AESTHETICS AND CHARACTER FRAMEWORK

**Section 5** provides high-level of guidance on aesthetic enhancements and recommended programming for Lebanon over the next 20 years. It is important to note that the built environment is made for people and their activities. Intentional visual identity, sense of community, high quality of life, and placemaking are important as the community continues to grow.

# GOALS AND STRATEGIES

## Goal 5.1

### Enhance and maintain overall property quality and maintenance.

#### **Strategy 5.1.1 Code Enforcement**

Strengthen property owner maintenance codes and enforcement, including consideration of periodic proactive code enforcement in targeted areas where city services requests are greatest.

#### **Strategy 5.1.2 Code Enforcement Practices**

Clearly define minimum requirements to ensure property inspections consistently meet city standards.

#### **Strategy 5.1.3 Property Maintenance Practices**

Support and encourage community members, landlords, and building owners to provide routine property maintenance.

#### **Strategy 5.1.4 Public Education Practices**

Develop and implement an educational program focused on property maintenance rules and ordinances. Continue and maintain a biannual communitywide clean-up day to assist with the educational program.

#### **Strategy 5.1.5 Large Item Pickup**

Consider implementing a separate large item pickup program to reduce illegal dumping and improper disposal.

## Goal 5.2

### Ensure that Lebanon's entrances are welcoming and representative of the community.

#### **Strategy 5.2.1 Cost and Funding**

Assess the level of cost and funding needs to improve the priority streetscapes identified in **Figure 5.1 Aesthetics and Character Framework**.

#### **Strategy 5.2.2 Appearance and Character**

Design and install the primary and gateway improvements to the identifies entrances.

#### **Strategy 5.2.3 Maintenance**

Evaluate and plan for the long-term maintenance of Lebanon's entryways, ensuring that the design features continue to convey the spirit and identify of the city.

## Goal 5.3

### Improve and implement the streetscape recommendations identified in the Aesthetics and Character Framework.

#### Strategy 5.3.1 Cost and Funding

Assess the level of cost and funding needs to improve the priority streetscapes identified in **Figure 5.1**.

#### Strategy 5.3.2 Appearance and Character

Identify, design, and implement the necessary improvements to the priority streetscape areas.

#### Strategy 5.3.3 Maintenance of Priority Streetscapes

Evaluate existing maintenance needs along the priority streetscape corridors as outlined in **Figure 5.1** and determine if additional funding and maintenance requirements are needed to keep these areas pristine.

## Goal 5.4

### Promote Lebanon's history, hometown feel, and sense of community through local aesthetic interventions.

#### Strategy 5.4.1 City Branding

Integrate Lebanon's brand throughout the city through branding placement on aesthetic enhancements and city communications.

#### Strategy 5.4.2 Public Art

Identify key spaces where public art could enliven the surrounding area. Ensure that city branding is utilized when appropriate.

#### Strategy 5.4.3 Historic Resources

Promote the preservation, rehabilitation, and maintenance of local historic resources. Encourage the designation and interpretation of Lebanon's historic assets through the careful survey of existing resources, their significance, the level of preservation needed, and method of preservation required to maintain their quality.

## Goal 5.5

### Continue to promote and develop downtown Lebanon as a unique and premier destination.

#### Strategy 5.5.1 Develop a Downtown Master Plan

Continue to the momentum for revitalizing downtown Lebanon by preparing a master plan document for strategic and resilient economic growth and development.

#### Strategy 5.5.2 Economic Development

Continue to promote a mix of uses in downtown – restaurants, retail, arts, entertainment, office, and housing.

#### Strategy 5.5.3 Multimodal Options

Support the continued transformation of downtown by improving sidewalk conditions, on-street bike lanes, and roadway conditions (see **Figure 4.1. Connectivity Framework** for further details).

#### Strategy 5.5.4 Public Realm

Continue to add distinctive urban design elements, public art, wayfinding, landscaping, and other feature to visually enhance the public realm within downtown Lebanon. Spaces should be inviting, accessible, and attractive for all people. Promote the development of plazas, pocket parks, and alleyways where appropriate.

## Goal 5.6

### Promote awareness and ensure residents have access to existing health, human resources, and educational programs.

#### Strategy 5.6.1 Education and Awareness

Collaborate with local and regional agencies to increase awareness of existing types of mental health care, addiction recovery, and homelessness services.

#### Strategy 5.6.2 Access to Services

Coordinate with local service providers to connect individuals in need of assistance to the services they need. Place a particular emphasis on the needs of vulnerable populations such as the elderly, people with disabilities, children and youth, low-income, and those with language barriers.

#### Strategy 5.6.3 Community Needs and Partnerships

Seek opportunities to strengthen partnerships with public, private, and nonprofit agencies to ensure efficient and effective delivery of health and human services residents. Where applicable, seek to optimize facilities, services, and programs that are provided by the city (e.g., recreation and educational offerings) to address the community's changing needs.

# CRITICAL ISSUES

The following is a list of critical issues related to Lebanon's existing aesthetics and city character. These critical issues were derived from the existing conditions analysis, the economic and market analysis, and stakeholder and public engagement.

- There are blighted areas of the city that need to be cleaned up and transformed.
- Commercial signage, particularly along Jefferson Avenue, is an eyesore and aesthetically unappealing.
- Multiple properties are vacant, particularly in the downtown.
- Streetscapes lack consistent landscaping, enhancements, and maintenance.
- Stakeholders indicated they would like to see additional cultural activities like festivals, local community events, and small-town businesses.
- Primary community entrance points are not perceived as aesthetically pleasing or welcoming.
- There is a lack of wayfinding signage throughout the city.
- Some stakeholders indicated that Lebanon's core identity was unclear and needed to be better defined.



# AESTHETICS AND CHARACTER FRAMEWORK

## DEVELOPING LEBANON'S AESTHETIC

While aesthetics may seem to be a superficial matter, it is an incredibly important aspect to supporting community events and local culture and pride within a community. Aesthetics can establish a sense of 'home' and energize community members as they go about their daily lives. It tells visitors that 'this' is Lebanon, and this is what our city stands for. It tells a story and promotes the community's identity.

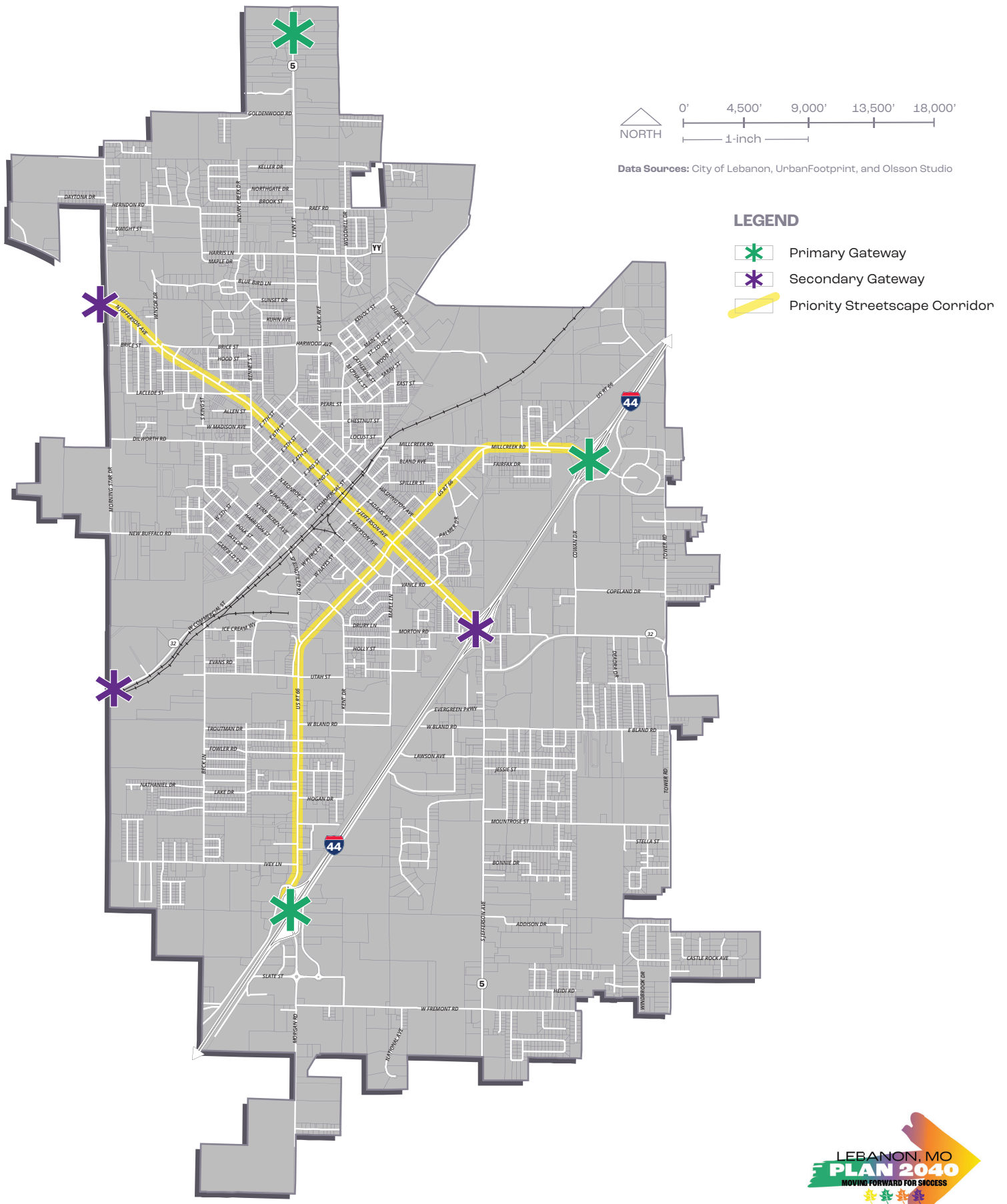
Aesthetic improvements can help attract developers and businesses as they look for a place to relocate to or open a new location. By defining a city's personality through design, these prospective newcomers can better understand if the city is the right place for their development efforts. Aesthetic improvements in key locations such as a downtown can promote more cultural activities. Community events, festivals, performances, organizational meetings, and farmer's markets tend to occur on common ground where there are aesthetically pleasing places with ample amenities. Lebanon should seek out design elements that make sense for the community and that tie into the local culture.

## GATEWAYS & ENTRYWAY MONUMENTATION

Gateways serve as entrances and exits into communities; they mark points of entry and points of change. They are the "first impressions" of a community and can symbolize one's character and values. Typically, gateways are located at high-traffic nodes to welcome visitors and identify a city's boundaries. The style, size, and features of a gateway should portray a desired vision of the community and developed in conjunction with other signage and monumentation throughout the city.

Gateway elements are one of the most powerful ways to establish the brand or identity for a given place. Due to budgetary constraints, the importance of each entry, and geological or natural feature limitations; gateway monumentation is often constructed in a hierarchy. Certain entrances may receive a higher level of importance due to the amount of traffic coming in and/ or its relative location to civic and public institutions. As shown in **Figure 5.1 Aesthetics and Character Framework**, there are six suggested gateways throughout the city: three primary and three secondary gateways.

# FIGURE 5.1 AESTHETIC AND CHARACTER FRAMEWORK



## Primary Gateway

The primary gateway is considered to be the most important option in the monumentation family, often being prioritized due to its level of importance and its associated cost. This gateway is likely to be larger than others, being positioned along areas of the busiest vehicular traffic. It will also require a more intense level of lighting and possibly even landscaping.



Within this framework, there are three primary gateways. One is located at the south end of Interstate 44, near the interchange with Route 66. The second is located at the northern end of Interstate 44, near Millcreek Road. The last is located at the most northern city limits at Highway 5. At the primary gateways for the city, they should receive more importance in terms of funding and structural design than other gateways within this framework.

## Secondary Gateway

Secondary gateways, while still important, are considered second in priority in terms of funding and needing to be constructed. These gateways are often placed at city entrances that receive less vehicular traffic than primary entrances. Rather than being placed along highways or freeways, these gateways are more likely to be placed along arterials streets. This framework suggests placing secondary gateways at 1) along South Jefferson Avenue, right under Interstate 44 or near it; 2) along West Commercial Street, coming in to the city from the southwest; and 3) at the city's entrance along North Jefferson Avenue, near Rolling Hills Road or the northwestern city limits.

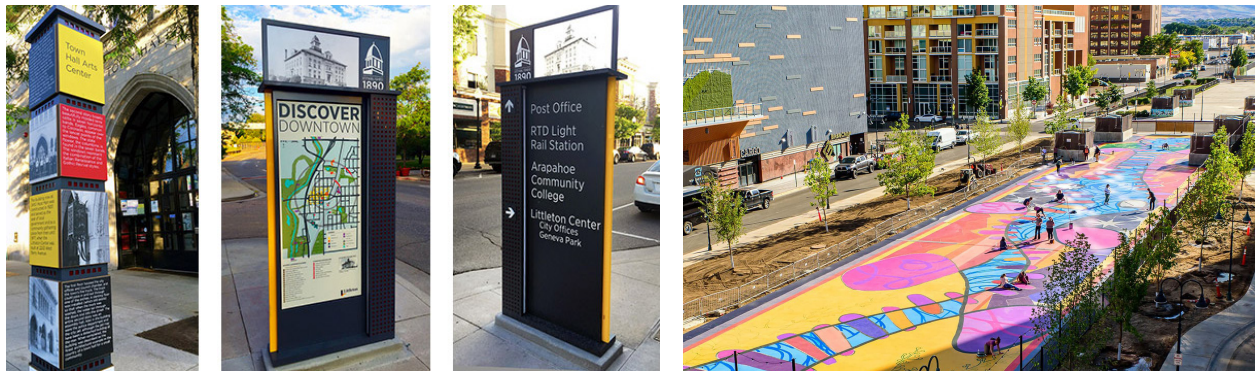


# PRIORITY STREETScape CORRIDORS

**Figure 5.1 Aesthetics and Character Framework** identifies certain corridors throughout that city that should be prioritized for streetscape enhancements. These enhancements can take many different forms, with certain corridors able to accommodate both vehicular and pedestrian improvements. **Figure 5.1** identifies two corridors within the city as needing enhancements 1) North Jefferson Avenue; and 2) along U.S. Route 66, connecting to Interstate 44 to the north and to the south. Enhancements along these corridors should continue to facilitate and allow for elevated levels of vehicular traffic due to their relation to Interstate 44. Both corridors should also consider pedestrian features. This includes wide sidewalks, including both attached and detached options, consistent shade street trees, consistent street and pedestrian scale lighting, and benches being place throughout to increase pedestrian comfort while walking along the corridor.

## Pedestrian Amenities

Amenities may include design features like benches or site furnishings, bike racks, trashcans and recycling bins, informational directories or kiosks, and public art installations. These items help make the pedestrian experience more comfortable, inviting others to continue to walk rather than choosing to drive their vehicles.



## Lighting

Streetscapes should be as well-lit as possible, and where appropriate. This will include a combination of streetlights, building lights, and pedestrian level lighting in certain areas. Motor vehicle operators should be able to see clearly in front of their automobiles. Pedestrians should feel safe walking along the corridors to their destination, particularly toward the more central part of the community.



## Landscaping

Landscaping can drastically enhance a streetscape appearance, adding color, texture, safety to the built environment. Additional landscaping should include street trees, berms, and well-managed lawns or rights-of-way.

- **Street Trees.** Street trees provide structure and aesthetic value to the streetscape without sacrificing visual access to storefronts, front doors, and signage that business owners require.
- **Medians.** Where appropriate, new and existing medians should include a combination of understory plantings such as native grasses and small, ornamental trees.
- **Turf Buffers.** Located between a curb and the sidewalk running parallel, turf buffers create a barrier that separate vehicles from pedestrians. Wide turf buffers also offer a perfect location for street trees.



While enhancements to the landscape along these corridors can make a huge, lasting impact on the appearance of Lebanon, it is not entirely necessary. Well-maintained landscaping should be prioritized, with little to nonexistent trash and debris being the goal.

## Wayfinding

Directional signs, maps, local attraction signage are all forms of wayfinding and can help visitors navigate to where they would like to go.





## Accessibility

Streetscapes should include ADA curb cuts, wheelchair ramps, and other features when possible, to make it easier for people with mobility challenges to navigate the street network.



## Safety

Crosswalks should be clearly marked, traffic signals should be timed to prioritize pedestrians, and traffic bumps and bulb outs should be utilized where appropriate. These measures can also act as traffic calming techniques.

Even though enhancements are desired along these corridors, it is understandable that it may take a while for funding for these enhancements. However, there are other “free” or low-cost options that can be considered in the meantime. Regardless, it is crucial that these corridors are kept clean and welcoming. These corridors are high traffic areas and are highly visible to visitors and residents alike. It is more important to see areas remain clean and well-managed. Below are some ideas for attainable projects or “quick wins” to motivate and energize the community in the meantime.

**Community Clean Up Day.** Lead a clean-up day with members in the community! Organize a day on the weekend where volunteers bring the tools and materials they have at their disposal, to help clean up some of the public rights-of-way.

**Paint It Again.** Crosswalks, traffic, and bike lane markers are often worn-down and need to be repainted due to weather and harsh seasonal conditions. Consider working with the Public Works Department to prioritize repainting these lines along the road. A fresh coat of paint can do wonders!

**Plant a Flower Bed.** Work with Parks and Recreation Department to install new flower gardens at key junctions. Bright, climate hardy grasses and broad leaf plants can make a big difference near a major intersection! Small public art pieces or monumentation can be included later.

## DEVELOPING LEBANON'S CHARACTER

Throughout the engagement process for this Plan, it was evident that people felt a strong sense of loyalty and sense of pride for their community. Residents indicated they felt proud of the school district, the 'hometown feel' of the community, and local organizations. If anything, stakeholders indicated that they wanted to feel more of this character be present throughout the city, not only in aesthetic improvements but also in cultural aspects and things to do. Multiple stakeholders indicated they would like more community events, retail options, and entertainment. Additionally, some comments indicated that Lebanon's identity was unclear. Even though people felt pride for their community, there was confusion over what sets Lebanon apart from other local communities in terms of values.

Lebanon has multiple existing assets that could continue to grow the city's sense of community and provide adequate space for local events. The city owns and operates 10 parks, an aquatic center, a senior center, and a civic center. The city's proximity to the Ozarks and its strong rural character set it apart from other cities within the State of Missouri. Lebanon should emphasize these unique assets by continuing to host local events and build on existing programming to establish a strong sense of character!

### Branding and Advertising

Branding is an important tool in building recognition of a city's culture and values. It's also a way to further promote a city's identity within a region. In Lebanon's case, the use of the city's unique logo will continue to help the community stand out within the region. In addition to integrating the city's brand to aesthetics improvements (e.g., gateways, banners, site furnishings, wayfinding signage, etc.), it should also be consistently included in advertisements and event promotions. As Lebanon continues to develop and promote local events, it is crucial that all marketing materials continue to work in tandem with the city's brand guide and logo.

### City Communications

The City of Lebanon's Public Information Office plays an important role in coordinating and disseminating pertinent information to the public. It manages and maintains several social media accounts (i.e., Facebook; X, formerly known as Twitter; Next Door; YouTube; Instagram; and TikTok). Despite being highly visible on social media, some stakeholders indicated that they were unaware of events or efforts made by the city, learning about these events or initiatives after the fact. Additional efforts should be made to promote these social media accounts with hopes of attracting more followers and garnering a larger attendance at community events.

Additionally, Lebanon has an active Tourism Office that manages and maintains **[visitlebanonmo.org](http://visitlebanonmo.org)**, a tourism website that hosts an event calendar of festivals and family and sporting events within the city. The website should continue to be optimized to keep residents and visitors informed on all upcoming occasions and local affairs.

## Promoting Healthy Living

Although the City of Lebanon is not directly responsible for access to health and human services, it is an important aspect of the overall well-being of the community. There are multiple organizations within Lebanon, Laclede County, and the region that are able to provide health and human services to members of the community. A consistent theme that kept reappearing throughout the engagement process was the lack of awareness of existing services and the lack of support for homelessness, addiction, and poor mental health.

Some organizations are able to provide support on specific issue or area of need, while others focus on understanding the broader needs of residents and coordination resource allocation among more local organizations. These organization include non-profits, county government, schools, and faith organizations. While some of these organizations provide support for those who need mental health, addiction recovery, and homelessness services, additional efforts or initiatives may be needed. There should be continued collaboration between the city, service providers, local and regional agencies, volunteers, and others in combatting rising needs in these areas.

## Downtown

Downtown Lebanon has recently seen many revitalization efforts. The downtown hosts a variety of retail and restaurants and encompasses six blocks along Commercial Street. The Lebanon Downtown Business District was formed in 1976 and is made up of a coalition of business owners and local professionals. It still serves at the city's original business district and currently supports approximately 380, 000 square feet of commercial space.

Downtown Lebanon should continue to update and modernize outdated amenities and infrastructure. It should also continue to fill vacant storefronts and promote infill development where appropriate. A consistent theme that arose from the engagement process was the lack of retail options. Residents felt like they had to travel outside of Lebanon to satisfy many of their retail shopping needs. Additionally, many stakeholders voiced their support for additional sit-down, local restaurant ventures. By advocating for new retail and restaurant ventures to be located in Downtown Lebanon, residents and visitors are able to have one location with a variety of options to choose from!

**[PAGE INTENTIONALLY LEFT BLANK]**

## SECTION 6 CONTENTS

HOW TO USE THE ACTION PLAN

LAND USE AND DEVELOPMENT  
MATRIX

CONNECTIVITY MATRIX

AESTHETICS AND CHARACTER  
MATRIX



# IMPLEMENTATION ACTION PLAN

**Section 6** This section sets forth the action portion of this plan, providing recommendations and policies that the City of Lebanon can utilize to achieve the vision that was created through this planning process. Although the implementation of these goals and policies is a continuous and ever-changing process, the first steps begin to make the community's vision a reality. It is also a partnership between the community and the city, a promise to achieve a better Lebanon, together.

# HOW TO USE THE ACTION PLAN

## A SUCCESSFUL ACTION PLAN

The Action Plan: Implementation Framework merges the vision and goals that were identified earlier in this Plan and provides a clear list of actionable strategies. Within this section, you will find a list of actions that uphold the strategies of each goal outlined in the Plan's sections.

Although this implementation framework is comprehensive, this Plan is a living document and should be reviewed and monitored regularly. As actions are completed and/or community priorities change, the Action Plan should be modified to stay relevant and useful to the community. It is not uncommon for budgetary constraints, public sentiment, or city goal changes to impact the implementation of several initiatives. Be mindful about what is possible and what is most important to the community. The following is a list of other items to be aware of as implementation begins.

- **Quick Wins!** Just because an action may be considered simple or easy doesn't mean it isn't important. These projects can be highly motivating for a community and can spur additional involvement to implement the Plan's actions.
- **Be Patient and Pivot.** Deadlines change, plans alter, and deals fall through – and that's okay! Although frustrating, these things occur. Remember to pivot when possible and adjust where needed.
- **Looking Local.** Remember that the solution to a problem or an answer to a question may be found locally within the community. While some may think a large corporation or business is necessary to pull off an action or task, the reality may require a more local, simple, and straightforward solution.

## COMPONENTS FOR SUCCESS

For a clear understanding of the scope and agents of this implementation framework, the following elements are prescribed for each action. These elements help prevent any miscommunication and may assist in leading discussions about the plausibility, timeframe, and use of resources when implementing the Plan's actions.

### Task Owners/Participants

Each action will have an identified task owner and an agency or department that is responsible for leading the implementation of the action. Other agencies or departments may be listed as participants, or essential personnel for the successful completion of said action. Both the task owner and participants are responsible implementation of the action.

- **Action/Task Owner:** Those who are in charge of leading the implementation of the action are shown in the **BOLD** text.
- **Action/Task Participants:** Those who are listed alongside the task owner in regular style font.

**Table 6.1 LAND USE AND DEVELOPMENT MATRIX**

**Goal 3.1 Develop and adopt a future land use plan that is flexible to market trends, and guides future development, redevelopment, and revitalization projects while balancing a mixture of uses.**

Action	Task Owner/Participant
<b>3.1.1:</b> Review the City's Code of Ordinances to ensure that it aligns with the Future Land Use Plan. This includes noting any changes that may need to be made.	<b>Codes Administration Department (Planning and Zoning)</b>
<b>3.1.2:</b> Align any current development applications with the Future Land Use Plan, ensuring they follow the future land use designations.	<b>Codes Administration Department (Planning and Zoning)</b>
<b>3.1.3:</b> Ensure the planning and zoning staff is aware of the Future Land Use Plan and verify the rezoning process for future development applications aligns with the Future Land Use Plan.	<b>Codes Administration Department (Planning and Zoning)</b>
<b>3.1.4:</b> Have conversations with local and regional developers about the future land use map, providing an idea of what the city would like to see in certain areas.	<b>Codes Administration Department (Planning and Zoning)</b>
<b>3.1.5:</b> Using the Development and Redevelopment Framework, identify specific vacant or underutilized sites.	<b>Codes Administration Department (Planning and Zoning)</b>
<b>3.1.6:</b> Consider market incentives and assistance packages for private ownership catalyst development sites (i.e., tax abatements, permit waivers, etc.).	<b>Codes Administration Department (Planning and Zoning)</b>
<b>3.1.7:</b> Work with various city departments to create plans for the potential redevelopment corridors identified in the Development and Redevelopment Framework.	<b>Codes Administration Department (Planning and Zoning)</b>

**Goal 3.2 Pursue strategic annexations (ideally if/when mutually beneficial to the property owner and city).**

Action	Task Owner/Participant
<b>3.2.1:</b> Strategize for and pursue property annexation, using <i>Figure 3.1 Development and Redevelopment Framework</i> .	<b>Codes Administration Department (Planning and Zoning),</b> Administration, Zoning and Planning Commission, City Council

### Goal 3.3 Expand housing choices and opportunities.

Action	Task Owner/Participant
<b>3.3.1:</b> Continue to review <i>Figure 3.2 Future Land Use Framework</i> and the Code of Ordinances provide for a mixture of housing styles.	<b>Codes Administration Department (Planning and Zoning),</b> Administration
<b>3.3.2:</b> Incentivize the inclusion of affordable housing in new developments.	<b>Codes Administration Department (Planning and Zoning),</b> Administration
<b>3.3.3:</b> Encourage the inclusion smaller attached and detached units that provide young families, singles, and others with an opportunity to afford housing	<b>Codes Administration Department (Planning and Zoning),</b> Administration

### Goal 3.4 Develop and adopt a downtown master plan.

Action	Task Owner/Participant
<b>3.4.1:</b> Develop a Request for Qualifications (RFQ) to hire a consultant to develop a Downtown Master Plan for Downtown Lebanon.	<b>Lebanon Downtown Association,</b> Codes Administration Department (Planning and Zoning), Administration
<b>3.4.2:</b> Work with the Downtown Lebanon advisory board and a consultant group to identify and form a focus group or a downtown-specific stakeholder group to further identify the community's desires for the area.	<b>Lebanon Downtown Association,</b> Codes Administration Department (Planning and Zoning), Administration
<b>3.4.3:</b> Encourage a robust engagement period during the downtown master planning process, ensuring that the community is aware of the renewed downtown efforts. And ample in-person and virtual engagement opportunities are available.	<b>Lebanon Downtown Association,</b> Codes Administration Department (Planning and Zoning), Administration
<b>3.4.4:</b> Develop a Downtown Master Plan with specific goals and strategies that seek to enhance and revitalize Downtown Lebanon. Specific site design concepts should be included within the Downtown Master Plan to help provide a visualization of what Downtown Lebanon could be.	<b>Lebanon Downtown Association,</b> Codes Administration Department (Planning and Zoning), Administration

### Goal 3.5 Support a diverse and stable economy that is resilient to economic stress

Action	Task Owner/Participant
<b>3.5.1:</b> Identify opportunity areas for improvement in the development process and take steps to make the process more accessible and efficient.	<b>Codes Administration Department (Planning and Zoning),</b> Administration, Lebanon Downtown Association, Lebanon Chamber of Commerce
<b>3.5.2:</b> Employ economic development programs and/or incentives that can benefit small and local businesses.	<b>Codes Administration Department (Planning and Zoning),</b> Administration, Lebanon Downtown Association, Lebanon Chamber of Commerce
<b>3.5.3:</b> Create business attraction strategies for key future growth industries, including healthcare, retail trade, industrial, and commercial	<b>Codes Administration Department (Planning and Zoning),</b> Administration, Lebanon Downtown Association, Lebanon Chamber of Commerce
<b>3.5.4:</b> Identify and share state, private non-profit, and federal funding opportunities available to existing and potential business owners.	<b>Codes Administration Department (Planning and Zoning),</b> Administration, Lebanon Chamber of Commerce

### Goal 3.6 Optimize opportunities for parks, open space, and other recreational amenities.

Action	Task Owner/Participant
<b>3.6.1:</b> Assess the current and near-future maintenance capacity of the Parks and Recreation Department.	<b>Parks and Recreation Department,</b> Codes Administration (Planning and Zoning), Administration
<b>3.6.2:</b> Regularly review and monitor the 2035 Parks Master Plan and its goals and strategies. Support the implementation of its strategies and actions.	<b>Parks and Recreation Department,</b> Codes Administration (Planning and Zoning), Administration
<b>3.6.3:</b> Identify funding for an Indoor Recreational Facility, including space for an indoor sports complex that provides a versatile and inclusive space for all ages and abilities.	<b>Parks and Recreation Department,</b> Codes Administration (Planning and Zoning), Administration
<b>3.6.4:</b> Prepare a Request For Qualification (RFQ) with the goal of hiring a consultant team to design and construct the Indoor Recreational Facility.	<b>Parks and Recreation Department,</b> Codes Administration (Planning and Zoning), Administration
<b>3.6.5:</b> Conduct a thorough stakeholder and public engagement process, engaging members of the public in the design process of the facility. This encourages the community to feel invested in the facility, building advocates for its construction.	<b>Parks and Recreation Department,</b> Codes Administration (Planning and Zoning), Administration
<b>3.6.6:</b> Construct the Indoor Recreational Facility.	<b>Parks and Recreation Department,</b> Codes Administration (Planning and Zoning), Administration
<b>3.6.7:</b> Identify and target funding sources for increased park infrastructure improvements and maintenance.	<b>Parks and Recreation Department,</b> Codes Administration (Planning and Zoning), Administration

**Table 6.2 CONNECTIVITY MATRIX**

**Goal 4.1 Maintain an accessible, safe, and efficient vehicular transportation system.**

Action	Task Owner/Participant
<b>4.1.1:</b> Evaluate the current and projected traffic volumes at the proposed intersection improvements in <b>Figure 4.1 Connectivity Framework</b> .	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration
<b>4.1.2:</b> Implement intersection improvements that improve the efficiently and safety of the identified locations in <b>Figure 4.1 Connectivity Framework</b> .	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration
<b>4.1.3:</b> Evaluate the city's transportation system to property prioritize maintenance and repair needs.	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration
<b>4.1.4:</b> Refer to local and state traffic crash data to identify areas within the city that are highly incident prone areas. Evaluate MoDOT safety methods to reduce their prevalence.	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration
<b>4.1.5:</b> Identify the areas within the city's transportation system that would benefit from traffic-calming measures, preventing pedestrian incidents.	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration
<b>4.1.6:</b> Identify any high-traffic areas that experience continual pedestrian crossings. Implement signalized crosswalks where appropriate.	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration
<b>4.1.7:</b> Work with the Missouri Coalition for Roadway Safety to provide education to residents and business owners.	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration
<b>4.1.8:</b> Review the city's Code of Ordinances to ensure that access management along primary corridors (e.g., Jefferson Avenue, Commercial Street, etc.) is appropriate.	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration

## Goal 4.2 Increase multimodal connectivity throughout the city.

Action	Task Owner/Participant
<b>4.2.1:</b> Evaluate the proposed sidewalk infill/improvement priority areas identified in <b>Figure 4.1 Connectivity Framework</b> and include recommendations for specific segments to be improved. Ensure that a 'to-do' or task list is clearly outlined and ready to be tackled.	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration
<b>4.2.2:</b> Take inventory of existing curb ramps and crosswalks. Ensure all curb ramps meet ADA accessibility requirements and crosswalks are clearly marked, ensuring pedestrian safety for all ability types.	<b>Public Works</b> , Codes Administration (Planning and Zoning)
<b>4.2.3:</b> Evaluate existing on-street bike lanes and road conditions. Ensure that bike lanes are separated from the roadway through the use of paint striping or bike lane delineators.	<b>Public Works</b> , Codes Administration (Planning and Zoning)
<b>4.2.4:</b> Implement the proposed on-street bicycle corridor improvements in the northern portion of the city along Bennett Street, South Madison Avenue, Clark Avenue, and East 4th Street that are identified in <b>Figure 4.1 Connectivity Framework</b> .	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration
<b>4.2.5:</b> Implement the proposed on-street bicycle corridor improvements in the southern portion of the city along Evergreen Parkway and Bland Road identified in <b>Figure 4.1 Connectivity Framework</b> .	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration
<b>4.2.6:</b> Implement the proposed North Loop Concept in the north portion of the city as identified in <b>Figure 4.1 Connectivity Framework</b> .	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration
<b>4.2.7:</b> Implement the proposed South Loop Concept in the south portion of the city as identified in <b>Figure 4.1 Connectivity Framework</b> .	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration
<b>4.2.8:</b> Evaluate the plausibility of Alignment A vs. Alignment B along the South Loop Concept identified in <b>Figure 4.1 Connectivity Framework</b> . Consider the infrastructure costs and needs of the local neighborhoods, understanding the costs and benefits of implementing either choice.	<b>Public Works</b> , Codes Administration (Planning and Zoning), Administration
<b>4.2.8:</b> Organize and coordinate with the Rails-to-Trails Conservancy to implement the proposed rail trail in the northern portion of the city, completing the segment of the North Loop Concept identified in <b>Figure 4.1 Connectivity Framework</b> .	<b>Codes Administration (Planning and Zoning)</b> , Administration

**Table 6.3 AESTHETICS AND CHARACTER MATRIX**

**Goal 5.1 Enhance and maintain overall property maintenance.**

Action	Task Owner/Participant
<b>5.1.1:</b> Identify areas of Lebanon that are consistently out of compliance with maintenance codes.	<b>Codes Administration</b> , Planning and Zoning
<b>5.1.2:</b> Encourage the enforcement of property owner maintenance codes, including the consideration of proactive code enforcement periods.	<b>Codes Administration</b> , Planning and Zoning
<b>5.1.3:</b> Develop public education materials focused on property maintenance rules and ordinances.	<b>Codes Administration</b> , Planning and Zoning
<b>5.1.4:</b> Consider the implementation of a public education program to help residents and business owners understand the importance of code compliance.	<b>Codes Administration</b> , Planning and Zoning, Administration, Zoning and Planning Commission, and City Council
<b>5.1.5:</b> Clearly define minimum requirements to ensure property inspections consistently meet city standards.	<b>Codes Administration</b> , Planning and Zoning
<b>5.1.6:</b> Continue and maintain a biannual community-wide clean-up day to assist with the educational program.	<b>Codes Administration</b> , Planning and Zoning
<b>5.1.7:</b> Consider implementing a separate large item pickup program large item pickup program to reduce illegal dumping and improper disposal.	<b>Codes Administration</b> , Planning and Zoning, Administration, Zoning and Planning Commission, and City Council
<b>5.1.8:</b> Consider implementing a community volunteer program to assist sick, elderly, , or struggling property owners with property management asks (e.g., mowing, trash and debris clean up, tree trimming, painting, etc.)	<b>Codes Administration</b> , Planning and Zoning, Administration, Zoning and Planning Commission, and City Council

**Goal 5.2 Improve and implement the streetscape recommendations identified in the Aesthetics and Character Framework.**

Action	Task Owner/Participant
<b>5.2.1:</b> Assess the level of cost and funding needed to improve the priority streetscapes identified in the <b>Figure 5.1 Aesthetics and Character Framework</b> .	<b>Codes Administration (Planning and Zoning)</b> , Public Works, Administration
<b>5.2.2:</b> Identify specific improvements for each streetscape, notating the recommended costs, timeframes, and responsible departments for these improvements.	<b>Codes Administration (Planning and Zoning)</b> , Public Works, Administration
<b>5.2.3:</b> Determine if streetscape improvements can or should be designed and completed by the City of Lebanon or by a consultant group.	<b>Codes Administration (Planning and Zoning)</b> , Public Works, Administration
<b>5.2.4:</b> Consider financing and developing a Streetscape Enhancement Plan to provide specific and detailed guidance for the streetscapes identified in the <b>Figure 5.1 Aesthetics and Character Framework</b> .	<b>Codes Administration (Planning and Zoning)</b> , Public Works, Administration
<b>5.2.5:</b> Determine the long-term funding and maintenance requirements for the streetscape improvements.	<b>Codes Administration (Planning and Zoning)</b> , Public Works, Administration

### Goal 5.3 Ensure that Lebanon's entrances are welcoming and representative of the community.

Action	Task Owner/Participant
<b>5.3.1:</b> Assess the level of cost and funding needs to install the primary and secondary gateway monumentation identified in the <b>Figure 5.1 Aesthetics and Character Framework</b> .	<b>Codes Administration (Planning and Zoning)</b> , Public Works, Administration
<b>5.3.2:</b> Develop a Request for Proposals (RFP) or Request for Qualifications (RFQ) and conduct a competitive bidding process to hire a consultant to develop a set of primary and secondary gateways.	<b>Codes Administration (Planning and Zoning)</b> , Public Works, Administration
<b>5.3.3:</b> Work with the consultant to design and develop a set of primary and secondary gateways.	<b>Codes Administration (Planning and Zoning)</b> , Public Works, Administration
<b>5.3.4:</b> Install the primary gateways as identified in the <b>Figure 5.1 Aesthetics and Character Framework</b> .	<b>Codes Administration (Planning and Zoning)</b> , Public Works, Administration
<b>5.3.5:</b> Install the secondary gateways as identified in the <b>Figure 5.1 Aesthetics and Character Framework</b> .	<b>Codes Administration (Planning and Zoning)</b> , Public Works, Administration
<b>5.3.6:</b> Evaluate and prepare for the long-term maintenance of Lebanon's gateways.	<b>Codes Administration (Planning and Zoning)</b> , Public Works, Administration
<b>5.3.7:</b> Continue to enhance the city's gateways through landscaping and maintenance.	<b>Codes Administration (Planning and Zoning)</b> , Public Works, Administration

**Goal 5.4 Promote Lebanon's history, hometown feel, and sense of community through local aesthetic interventions.**

Action	Task Owner/Participant
<p><b>5.4.1:</b> Ensure that Lebanon's branding is included throughout the city on infrastructure improvements.</p>	<p><b>Communications/Public Information Office,</b> Codes Administration (Planning and Zoning), Lebanon Chamber of Commerce</p>
<p><b>5.4.2:</b> Promote the inclusion of public art in public and communal spaces.</p>	<p><b>Communications/Public Information Office,</b> Codes Administration (Planning and Zoning), Lebanon Chamber of Commerce</p>
<p><b>5.4.3:</b> Promote public art through both temporary and permanent installations. Work with local and regional artists to showcase their work within public and communal spaces such as Downtown Lebanon.</p>	<p><b>Communications/Public Information Office,</b> Codes Administration (Planning and Zoning), Lebanon Chamber of Commerce</p>
<p><b>5.4.4:</b> Assess the number of local historic assets present within the city. This includes conducting a survey of all assets, both physical and cultural, their significance, the level of preservation needed, and the method of preservation required to maintain their quality.</p>	<p><b>Communications/Public Information Office,</b> Codes Administration (Planning and Zoning), Lebanon Chamber of Commerce</p>
<p><b>5.4.5:</b> Further familiarize staff with the requirements to be a part of the National Registry of Historic Places.</p>	<p><b>Communications/Public Information Office,</b> Codes Administration (Planning and Zoning), Lebanon Chamber of Commerce</p>
<p><b>5.4.6:</b> Make adjustments to the city's Code of Ordinances to reduce historic reservation barriers (e.g., reduced parking requirements).</p>	<p><b>Communications/Public Information Office,</b> Codes Administration (Planning and Zoning), Lebanon Chamber of Commerce, Planning and Zoning Commission, City Council</p>

## Goal 5.5 Continue to promote and develop downtown Lebanon as a unique and premier destination.

Action	Task Owner/Participant
<b>5.5.1:</b> Work with local downtown property owners to ensure their properties are “move-in” ready for tenants.	<b>Codes Administration</b> , Planning and Zoning
<b>5.5.2:</b> Incentivize local and regional businesses to locate in downtown Lebanon.	<b>Codes Administration (Planning and Zoning)</b> , Economic Development, Administration
<b>5.5.3:</b> Identify all vacant lots and spaces that are available for purchase.	<b>Codes Administration</b>
<b>5.5.4:</b> Work with the Lebanon Chamber of Commerce to incentivize the purchase of vacant lots and properties for those with a business development application.	<b>Codes Administration (Planning and Zoning)</b> , Economic Development, Administration, Lebanon Downtown Association
<b>5.5.5:</b> Incentivize and collaborate on the timing of development in the downtown, ensuring that services and retail and housing options are being developed in conjunction with one another (i.e., a small corner grocery store goes in at the same time that residents move into lofts and other housing in the downtown).	<b>Codes Administration (Planning and Zoning)</b> , Economic Development, Administration, Lebanon Downtown Association
<b>5.5.6:</b> Evaluate the proposed sidewalk infill/improvement priority area identified in <b>Figure 4.1 Connectivity Framework</b> and include recommendations for specific segments to be improved and provide connections within the Downtown Master Plan. Ensure that a ‘to-do’ or task list is clearly outlined and ready to be tackled.	<b>Codes Administration (Planning and Zoning)</b> , Public Works, Administration
<b>5.5.7:</b> Take inventory of existing curb ramps and crosswalks. Ensure all curb ramps meet ADA accessibility requirements and crosswalks are clearly marked, ensuring pedestrian safety.	<b>Codes Administration (Planning and Zoning)</b> , Public Works
<b>5.5.8:</b> Evaluate existing on-street bike lanes and road conditions. Ensure that bike lanes are separated from the roadway through the use of paint striping or bike lane delineators.	<b>Codes Administration (Planning and Zoning)</b> , Public Works
<b>5.5.9:</b> Implement the proposed on-street bicycle corridor improvements along 4th Street and South Madison Avenue that are identified in Figure 4.1 Connectivity Framework.	<b>Codes Administration (Planning and Zoning)</b> , Public Works
<b>5.5.10:</b> Implement the proposed North Loop Concept along North Van Buren Avenue, connecting a portion of the downtown with the North Loop Concept that winds around Lebanon.	<b>Codes Administration (Planning and Zoning)</b> , Public Works
<b>5.5.11:</b> Prioritize roadway maintenance and improvements along E. commercial Street and other streets within the downtown area.	<b>Codes Administration (Planning and Zoning)</b> , Public Works

Action	Task Owner/Participant
<b>5.5.12:</b> Work with local arts groups and the downtown advisory board to identify locations for unique art sculptures, murals, and interactive art pieces.	<b>Codes Administration (Planning and Zoning)</b> , Economic Development, Administration, Lebanon Downtown Association
<b>5.5.13:</b> Develop a Request for Proposals (RFP) for local and regional artists to create unique pieces of work that could be installed in Downtown Lebanon.	<b>Codes Administration (Planning and Zoning)</b> , Economic Development, Administration, Lebanon Downtown Association, Zoning and Planning Commission, City Council
<b>5.5.14:</b> Develop a Request for Qualifications (RFQ) to hire a consultant or local team to develop a wayfinding and signage system. Ensure that the wayfinding and signage system is branded with city colors, logos, and images.	<b>Codes Administration (Planning and Zoning)</b> , Economic Development, Administration, Lebanon Downtown Association, Zoning and Planning Commission, City Council
<b>5.5.15:</b> Consider the inclusion of a public art component to the Downtown Master Plan when that process occurs.	<b>Codes Administration (Planning and Zoning)</b> , Economic Development, Administration, Lebanon Downtown Association

**Goal 5.6 Promote awareness and ensure residents have access to existing health, human resources, and educational programs.**

Action	Task Owner/Participant
<b>5.6.1:</b> Reaffirm existing relationships with local and regional agencies that specialize in health care, addiction recovery, and homelessness services. For lapsed relationships, reconnect and continue to have conversations with members of the staff.	<b>Administration, Codes</b> Administration (Planning and Zoning)
<b>5.6.2:</b> Consider establishing a staff position that specializes in knowing local and regional programs and agencies. Have them serve as a point of contact for the city.	<b>Communications/Public Information Office, Administration, Codes</b> Administration (Planning and Zoning)
<b>5.6.3:</b> Collaborate regularly with these agencies through annual or bi-annual meetings.	<b>Administration, Codes</b> Administration (Planning and Zoning)
<b>5.6.4:</b> Identify and evaluate existing programs and services for the elderly, people with disabilities, youth, low-income, and those with language barriers.	<b>Administration, Codes</b> Administration (Planning and Zoning)
<b>5.6.5:</b> Assess the level of need and level of service provided, noting discrepancies that should be filled.	<b>Administration, Codes</b> Administration (Planning and Zoning)
<b>5.6.6:</b> Encourage the involvement of additional agencies where needed.	<b>Administration, Codes</b> Administration (Planning and Zoning)
<b>5.6.7:</b> Evaluate and identify public engagement opportunities where local and regional agencies can advertise their services and the agency's function	<b>Administration, Codes</b> Administration (Planning and Zoning)
<b>5.6.8:</b> Seek opportunities to strengthen partnerships with public, private, and nonprofit agencies.	<b>Administration, Codes</b> Administration (Planning and Zoning)

**[PAGE INTENTIONALLY LEFT BLANK]**

## APPENDIX A CONTENTS

EXISTING LAND USE

EXISTING ZONING

EXISTING PARKS,  
RECREATION, AND  
DESTINATIONS

EXISTING  
TRANSPORTATION AND  
CONNECTIVITY

EXISTING NATURAL  
FEATURES

EXISTING COMMUNITY  
HEALTH AND QUALITY  
OF LIFE

EXISTING UTILITIES

EXISTING  
DEMOGRAPHICS

EXISTING EMPLOYMENT  
CONDITIONS

RESIDENTIAL HOUSING  
MARKET

RETAIL, OFFICE, AND  
INDUSTRIAL MARKETS



# EXISTING CONDITIONS

Long-range planning must be founded on an understanding of a community's past and present. Appendix A presents a summary of the analysis of the current state of the City of Lebanon. This section acknowledges the importance of well-informed recommendations and strategies that properly respond to existing realities.

**Appendix A** provides an overview of Lebanon's place and role within the region, natural and physical characteristics, and demographic and economic trends.

# EXISTING LAND USE

Lebanon is located in Laclede County, Missouri, and is approximately 55 miles northeast of Springfield, Missouri. According to the city, Lebanon occupies approximately 14.59 square miles – or approximately 9,336.22 acres – of land area. Major roadways include Interstate 44, spanning northeast to southeast across the city. MO-32 runs east to west, and MO-64 from the west and MO-5 running north to the south. As shown in **Figure A.1 Existing Land Use on page A4**, most of the land surrounding the downtown and E. Commercial Street are designated as commercial, single-family residential, or civic land uses.

In total, Lebanon has a significant amount of land devoted to single-family residences; with approximately 27.34 percent of Lebanon's total area is devoted to this land use. Large groupings of low-density, large lot residential areas are concentrated to the north and south of the city. Smaller lot single-family residences are interspersed with other land uses in the central portion of the city. Multifamily residential uses are dispersed sparingly around the city, intermingled with single-family residential uses and making approximately 1.67 percent of the total land area.

Lebanon also has a sizable amount of land devoted to undeveloped properties. This comprises approximately 30.42 percent and may include agricultural land. Undeveloped properties are primarily found towards the periphery of the city and other land uses. Some parcels of this land use are located Interstate 44.

Industrial land use totals approximately 5.25 percent of the total land use acreage. This land use is centered around Interstate 44 and along the railway that runs beside East Commercial Street. These uses tend to be situated near major transportation system entrances and exits as shown in **Figure A.1 Existing Land Use**.

## KEY TAKEAWAYS

Lebanon's primary existing land uses are undeveloped property and single-family residential. Industrial uses are located near Interstate 44, MO-64, MO-5, and the railway. Development is much denser in the central north region of the city, evidenced by the smaller lot sizes centered in downtown. The residential lot sizes to the south of Interstate 44 are much larger, which may be indicative of newer developments that have grown up over time.

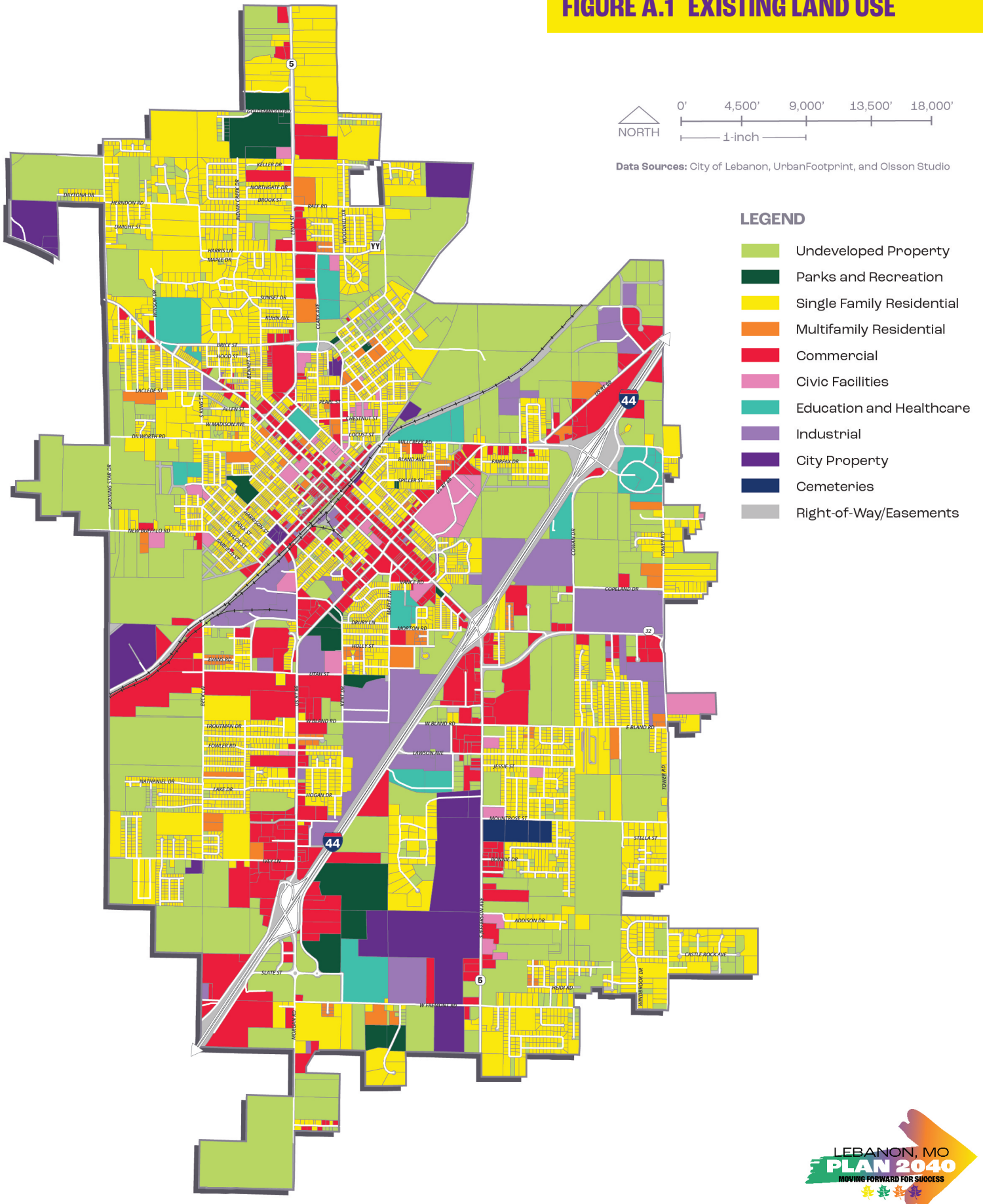
**TABLE A.1    LEBANON LAND USE BREAKDOWN BY ACREAGE**

LAND USE	ACRES	PERCENT
Cemeteries	27.32	0.29%
City Property	374.16	4.01%
Civic Facilities	143.07	1.53%
Commercial	998.77	10.70%
Education and Healthcare	246.27	2.64%
Industrial	490.60	5.25%
Multifamily Residential	155.54	1.67%
Parks and Recreation	199.12	2.13%
Single Family Residential	2552.39	27.34%
Undeveloped Property	2840.09	30.42%
Right-of-Way/Easements	1,308.90	14.02%
<b>Total</b>	<b>9,336.22</b>	

*Data source: City of Lebanon*



# FIGURE A.1 EXISTING LAND USE



# EXISTING ZONING

**Figure A.2 City of Lebanon, Existing Zoning on page A6** illustrates existing zoning within the community. Lebanon currently has 12 zoning districts which include:

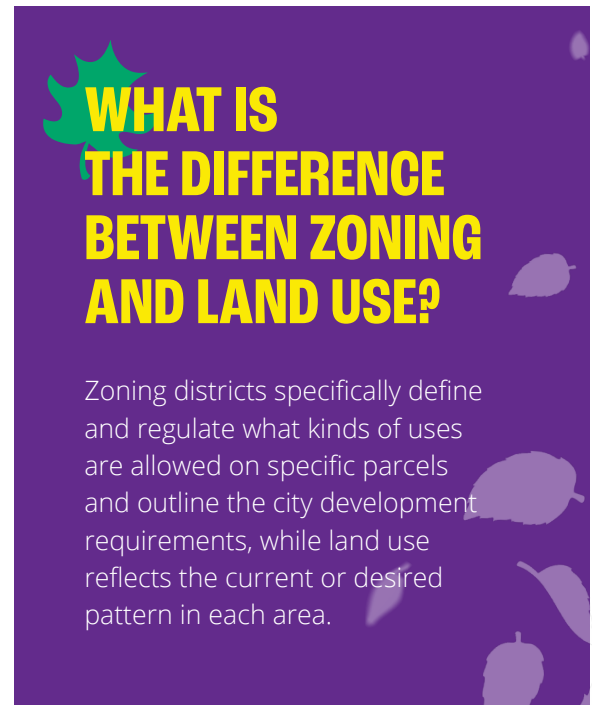
- **RU-1** Rural
- **RU-2** Cemetery
- **RS-1** Residential
- **RS-2** Residential
- **RS-3** Residential
- **RS-4** Residential
- **NC** Neighborhood Commercial
- **C-1** General Commercial
- **C-2** Downtown Commercial
- **C-L** Limited Commercial
- **M-1** Light Industrial
- **M-2** General Industrial

## KEY TAKEAWAYS

Based on the existing zoning, the intersection of East Commercial Street and South Jefferson Avenue serves as the major commercial corridor for Lebanon. Along these roads are C-2 Downtown Commercial and C-1 General Commercial. There are concentrated pockets of C-1 General Commercial located off exits for Interstate 44, and the heavily zoned areas of M-1 Light Industrial are parallel to the interstate. The most intense zoned areas RS-2 Residential are adjacent north of the C-2 Downtown Commercial district.

The areas near the northern and southern portions of Lebanon are primarily zoned RS-1 Residential. The city is primarily zoned residential – low and medium density - with minimal land area designated for multi-family residential uses. There are minimal areas that are zoned for Rural and Light Commercial uses within these residential districts.

It should also be noted that the city does not have a specific zoning designation for parks or recreational uses. Parks are currently either located in areas zoned Residential, Industrial, or Commercial.





# EXISTING PARKS, RECREATION, AND DESTINATIONS

Proximity to the Ozarks, provides Lebanon rural character, characterized by rolling hills. These features contribute to the various recreational opportunities within the city including a total of 10 city-owned parks, an aquatic center, a senior center, a civic center, and a conservation area. These parks and open spaces contribute greatly to the quality of life in Lebanon. Existing parks, and recreation points include the following:

- **Atchley Park** is one of the largest parks located at the north end of Lebanon. It offers four baseball/softball fields, four acres of open multi-purpose space, disc-golf course, batting cages, soccer fields, two playgrounds, restrooms, and six shelters.
- **Boswell Park** offers baseball/softball field and batting cage. It also offers a basketball court, a tennis court, horseshoe pits, and a spray fountain. The Boswell Aquatic Center offers a pool with slides, climbing walls, and a diving board. There are five acres of open multi-purpose space, a Route 66 themed playground, four shelters, and restrooms. Other unique structures located in the park are three murals depicting Route 66.
- **Gasconade Park** offers a basketball court, an open multi-purpose space, a playground, a skate park, two shelters, and restrooms. This park additionally offers the Hughes Senior Center which offers recreational activities targeted towards seniors.
- **Harke Park** offers a soccer field, a walking trail, and a disc-golf course. There is an open multi-purpose space, a playground, one picnic area with two BBQ grills, one gazebo with one BBQ grill, and restrooms.
- **Nelson Lake** offers a catch and release fishing lake, a quarter-mile lighted walking trail, and a picnic area.
- **Nelson Park** is the second largest park to Atchley Park. It offers four baseball/softball fields, a walking trail, and access to the State of Missouri Coleman Conservation Area. There are three playgrounds, two concession stands, two shelters, and restrooms.
- **Palmer Park** offers an open multi-purpose space, green space at Cowan Civic Center (CCC), access to CCC walking trail, a gazebo, and a veteran's memorial plaza.
- **Spiller Park** offers a playground, and one shelter.
- **Wallace Park** offers a playground, pickleball courts, basketball courts, disc-golf course, and a wooden gazebo.
- **Winfrey Memorial Acres** offers a total of 14 acres consisting of the Conn Winfrey House, and a storage barn.
- **W.T Vernon Park** offers a playground, a shelter, and restrooms.

## KEY TAKEAWAYS

Lebanon provides a wide variety of community facilities (public and privately owned) to its residents and visitors. In addition to the 133 acres of park space and miles of trails, the Parks Department works with organizations to provide other events throughout the year. Furthermore, the city allows visitors to reserve shelters, and youth sports are now operated by the Parks Department. The city also features places of historical significance such as the murals and fountain of Route 66 in Boswell Park.

# EXISTING TRANSPORTATION & CONNECTIVITY

Lebanon's transportation network consists of a collection of facilities that primarily serve vehicular traffic, but freight railroad service also runs through the city. Limited active transportation for pedestrians and bicyclists exists. The following section details the current transportation facilities.

## ROADWAY NETWORK

**Figure A.3 Existing Transportation Network** shows the existing roadway network. Lebanon is located along MO-5, which runs parallel to city limits as it crosses Interstate 44 then continues south. Within Lebanon, the majority of MO-5 is two lanes on each side with a center turn lane. MO-32 is a two-lane highway that stretches west, intersects with MO-5, then continues southwest existing to the east city limits. Interstate 44 cuts through the city diagonally on the east side of the city and intersects with MO-5/MO-32/MO-64.

The city's roadway network consists of arterial, collector, and local roads that typically do not follow a traditional grid pattern. Since the city is split by an interstate and has two highways that cross-intersect, the main collector roads such as South Madison Avenue, East Commercial Street, Laclede Street, Main Street, South Adams Avenue, Ice Cream Highway, and Maple Lane are used to connect vehicular traffic to these roadways.

The remaining roads throughout Lebanon are considered local streets, which provide direct access from local residential and commercial streets to adjacent properties.

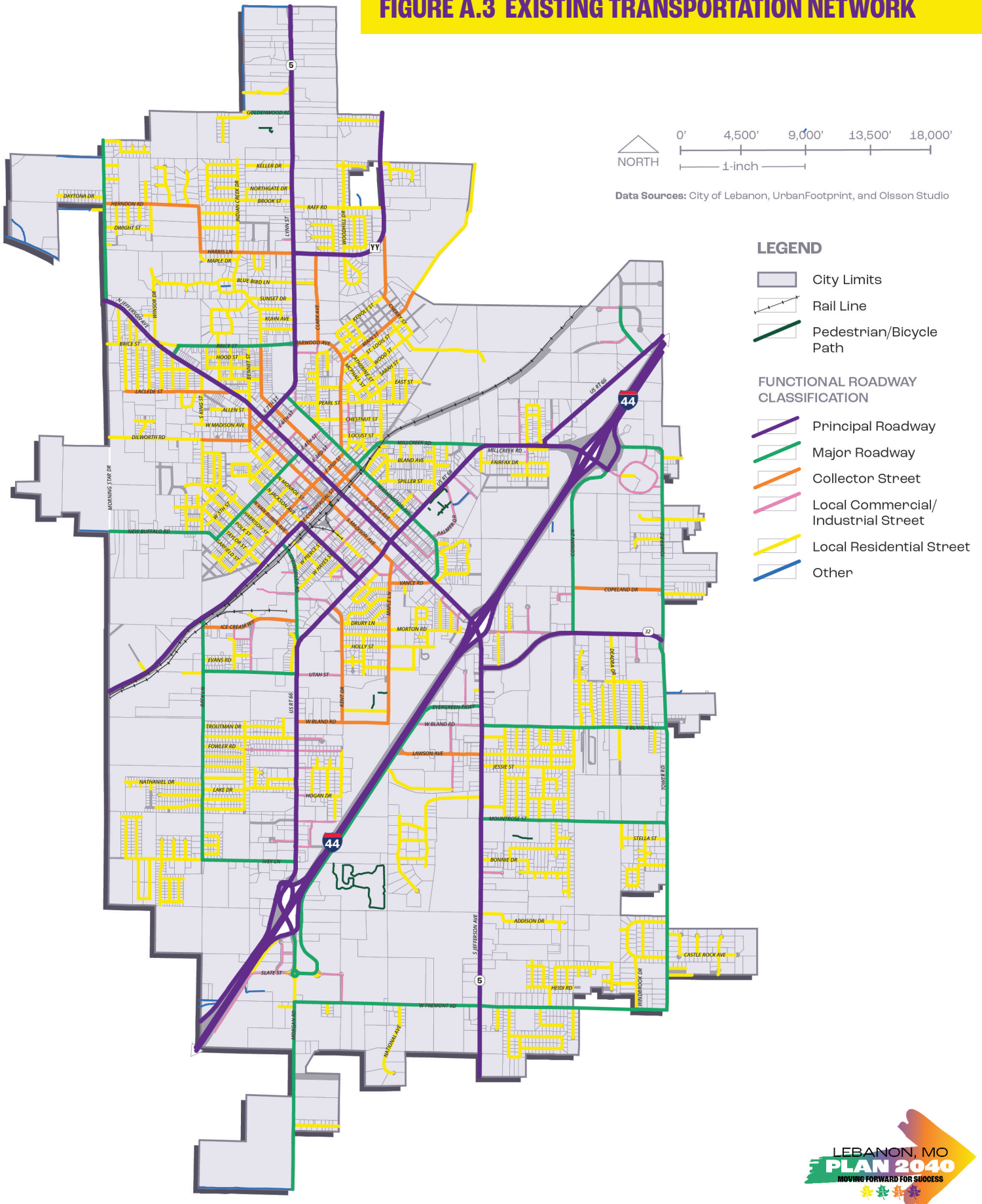
## ACTIVE TRANSPORTATION

**Figure A.4 Existing Active Transportation Network on page A10** shows a map of the existing and recommended active transportation network throughout the city.

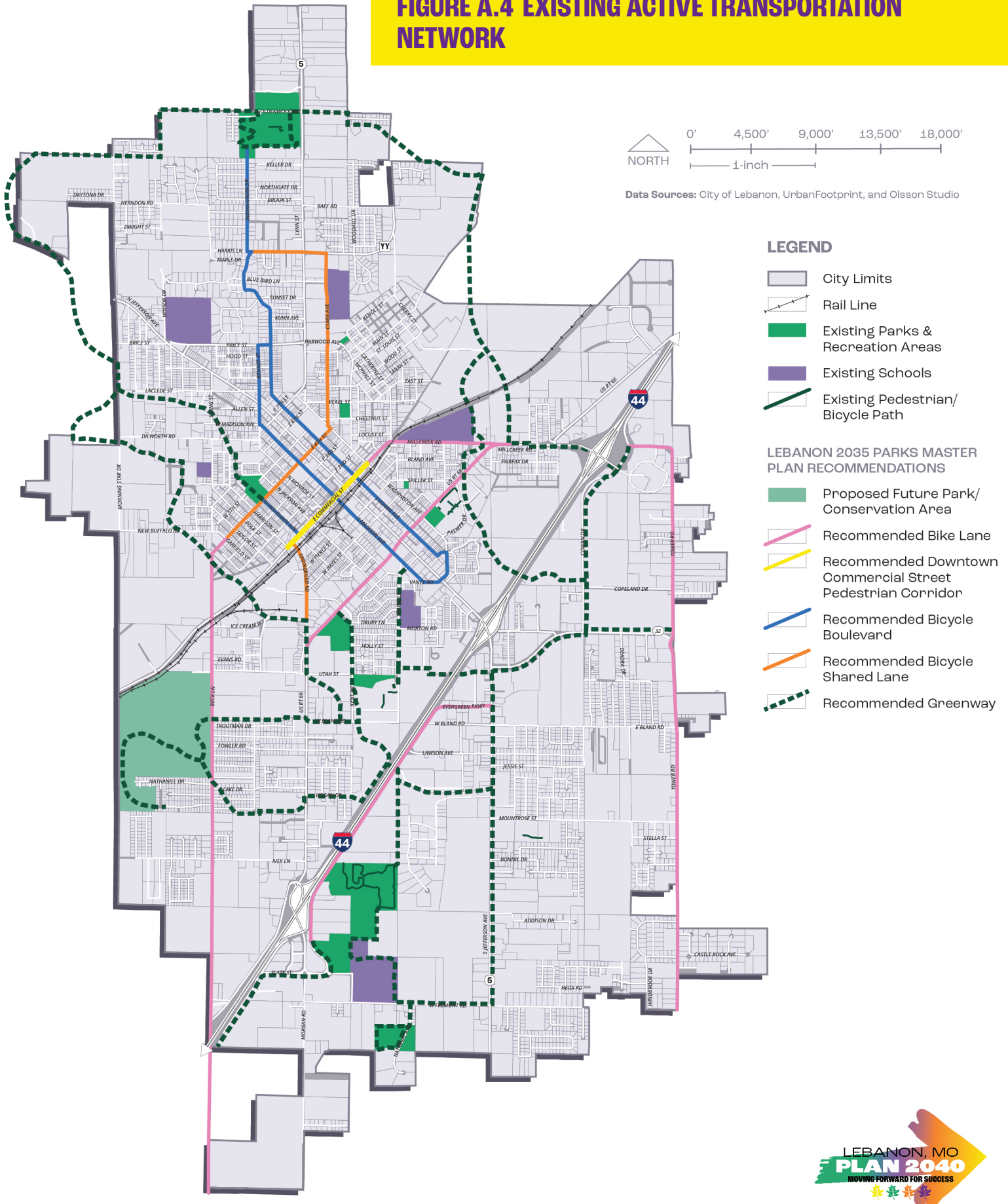
Lebanon's residents rely primarily on automobiles for their daily commute. The Parks Department within Lebanon has invested in walking and biking trails for recreation with a total of two (2) miles. According to a recent survey, 52 percent of residents indicated that they would be very supportive of developing new walking and bike trails to connect neighborhoods to destinations.

The 2035 Parks Master plan addressed this need by recommending the development of a multimodal network to connect popular destination points. The recommended network is shown on the map in **Figure A.4** and consists of the following elements starting on page A11.

# FIGURE A.3 EXISTING TRANSPORTATION NETWORK



# FIGURE A.4 EXISTING ACTIVE TRANSPORTATION NETWORK



- **Bike Lanes.** Bike lanes are on-street lanes that are dedicated to bicycle traffic. Traffic can be separated from vehicular traffic by utilizing a visual barrier (e.g., painted line) or a physical barrier (e.g., bollards, planters, a parking lane, etc.).
- **Downtown Commercial Street Pedestrian Corridor.** Pedestrian corridors are areas of roadway that are closed to vehicular traffic- either temporarily or permanently. Downtown areas are ideal for pedestrian corridors due to the existing levels of foot traffic and pedestrian-scaled amenities.
- **Bicycle Boulevard.** Bicycle boulevards are streets that give priority to bicycle users. Bike boulevards work best on low-traffic residential streets and should consider diversion techniques for vehicular traffic, such as running parallel to through streets.
- **Bicycle Shared Lane.** Shared lanes are on-street bicycle routes that do not have dedicated traffic lanes. Rather, the routes are designated with an arrow marking (often referred to as a “sharrow”). Shared lanes should be utilized in areas where bike lanes or boulevards are not practical.
- **Greenway.** An off-street, greenway network would provide multimodal connectivity to major destinations. The network should be a citywide loop system and be safe, comfortable, and accessible for users of all age levels and abilities.

## On-Demand Transit

While the City of Lebanon does not currently offer public transportation, service is available through OATS, a non-profit organization providing public transportation services to 87 counties within Missouri. This service is available to anyone regardless of factors, and typically provides transit that connects people to other transportation services such as Amtrak. In Laclede County, transportation within Lebanon is available between Monday–Friday, 7:00 a.m. - 4:00 p.m. and is available seven miles outside of city limits. Transportation is available to Springfield and Lead Mine monthly for eight dollars.

## Railroads

The Burlington Northern-Santa Fe (BNSF) rail line runs diagonally through Lebanon. This railroad is largest freight railroads in North America with a total of 32,500 miles of track.

## KEY TAKEAWAYS

Residents heavily rely on vehicular transportation via MO-5, MO-32, and MO-64, Interstate 44, and principal roads such as West Freemont Road, Tower Road, and Washington Avenue to commute. The resident desire to add additional trails and paths that connect to destinations are indicative that there is a lack of multi-modal transportation within city limits. Implementation of the 2035 Parks Master Plan corridor network will provide alternatives for local trips and alleviate the necessity of a vehicle.

# EXISTING NATURAL FEATURES

Lebanon is located in the Salem Plateau subregion of the larger Ozark Mountain Region, an area known for rolling hills, lakes, and streams. In addition to being near a variety of recreational and conservation offerings, the Missouri Department of Conservation Lebanon Forestry Office serves as a base of operation for field staff working in and around the area. The following section describes natural features in and around city limits.

## WATERBODIES AND WATERWAYS

Lebanon is located between the Niangua River to the west and the Osage Fork of the Gasconade River to the southeast. The Gasconade River watershed partially covers areas within city limits to the southeast. To the west, Bennett Springs is a historically popular natural feature and one of Missouri's earliest parks. Over 100 million gallons of cold water flow from the spring per day, making it ideal for angler fishing, hiking, floating, and camping. Bennett Springs State Park is located approximately 11 miles to the west along MO-64 and provides access to the Niangua River.

Lebanon and surrounding areas are popular for water recreation due to the proximity of several natural and man made lakes, including Lake of the Ozarks, Harry S. Truman Reservoir, Pomme de Terre Lake, and Stockton Lake.

## FLOODWAYS AND FLOODPLAINS

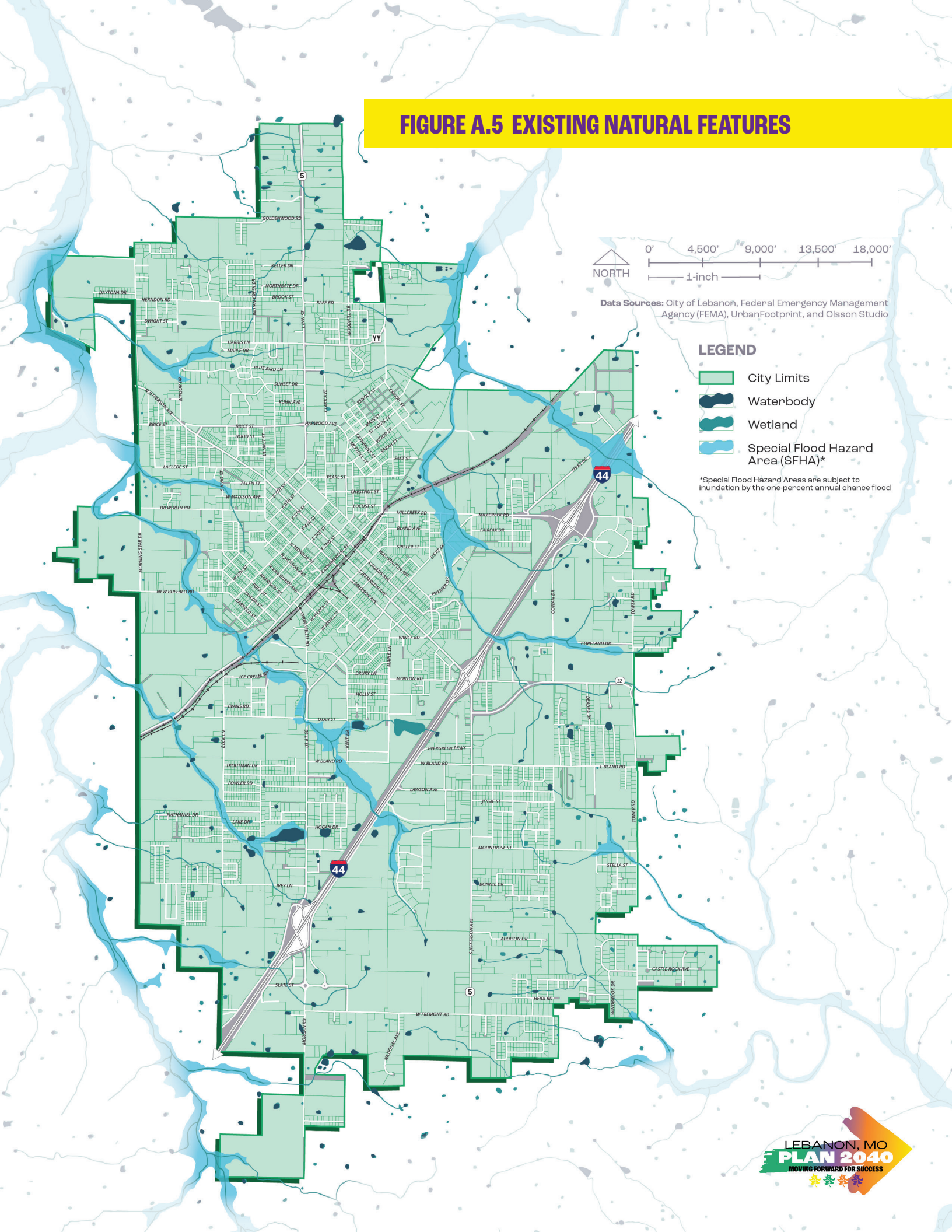
**Figure A.5 Existing Natural Features** illustrates floodplain areas throughout the city. Flood risk has been shown throughout the city through the Federal Emergency Management Agency's (FEMA) National Flood Insurance Program. FEMA typically identifies flood-prone areas through detailed hydrologic and hydraulic modeling and occasionally through approximate methods to assist with planning, management, and risk assessment within watersheds.

Based on FEMA's assessments, portions of Lebanon reside within a Special Flood Hazard Area. Special Flood Hazard Areas have a One-Percent Annual Chance of Flood Hazard. In response to these areas, the City of Lebanon regulates some development activity within and near floodplains and requires a separate Floodplain Development Permit.

## KEY TAKEAWAYS

While some areas within Lebanon city limits are at risk for flood hazard, most of the city is at low or zero risk of flooding. The City of Lebanon is an active member of the larger Ozark Mountain Region and works with surrounding communities on conservation efforts beyond city limits.

# FIGURE A.5 EXISTING NATURAL FEATURES



# EXISTING COMMUNITY HEALTH & QUALITY OF LIFE

Health factors have a significant impact on the quality of life (e.g., how long and how well someone lives) experienced in a community. Lebanon's health factors are broadly explored at the county level in this section through data and findings provided by County Health Rankings & Roadmaps (CHR&R).

## HEALTH OUTCOMES

Health outcomes are determined by both length of life and quality of life. Different datasets are used to determine length and quality of life, which are detailed as follows:

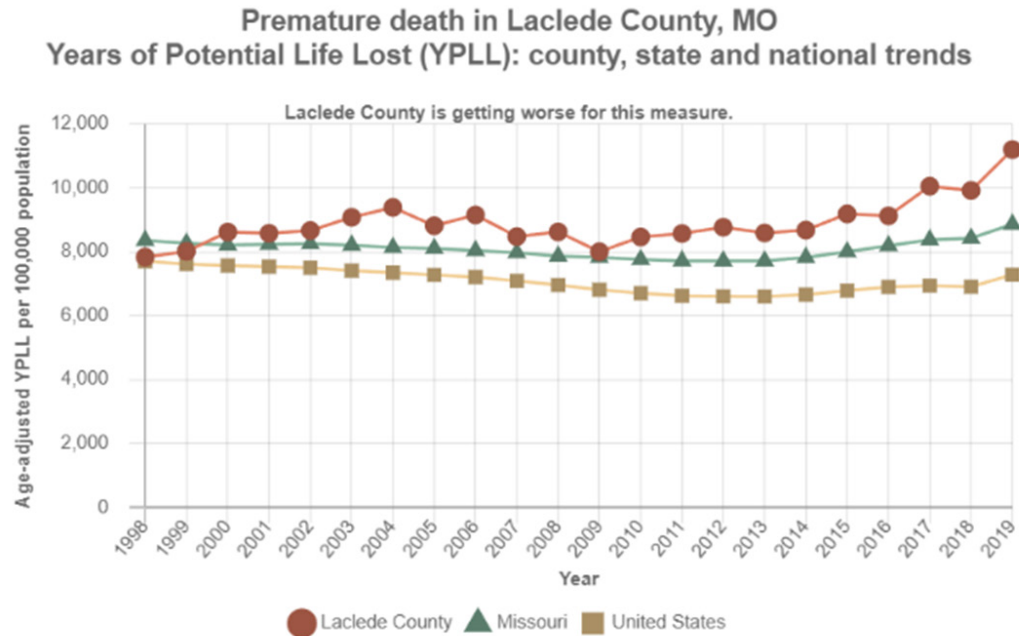
### Length of Life Datasets

- **Premature Death Dataset** refers to years of potential life lost before age 75 per 100,000 population (age-adjusted). In Laclede County, 11,200 years of life were lost to deaths of people under age 75, per 100,000 people, compared to 8,900 years in Missouri and 7,300 across the United States. Laclede County is trending negatively for this dataset. The leading causes of death in Laclede County are malignant neoplasms, diseases of the heart, chronic lower respiratory diseases, accidents, chronic lower respiratory diseases, and cerebrovascular diseases.

### Quality of Life Datasets

- **Poor or Fair Health** refers to the percentage of adults reporting fair or poor health (age-adjusted). In Laclede County, 18 percent of adults reported that they consider themselves in fair or poor health, compared to 15 percent in Missouri and 12 percent across the United States.
- **Poor Physical Health Days** refers to the average number of physically unhealthy days reported in the past 30 days (age-adjusted). In Laclede County, adults reported that their physical health was not good on 4.1 days of the previous 30 days, compared to 3.4 days in Missouri and 3.0 days across the United States.
- **Poor Mental Health Days** refers to the average number of mentally unhealthy days reported in the past 30 days (age-adjusted). In Laclede County, adults reported that their mental health was not good on 5.3 days of the previous 30 days, compared to 4.9 days in Missouri and 4.4 days across the United States.
- **Low Birthweight** refers to the percentage of live births with low birthweights. In Laclede County, eight percent of babies had low birthweights (under five pounds, eight ounces), compared to nine percent in Missouri and 8 percent across the United States.

## FIGURE A.6 PREMATURE DEATH DATASET (LACLEDE COUNTY VS. MISSOURI VS. UNITED STATES)



Notes:  
Each year represents a 3-year average around the middle year  
(e.g. 2015 is the middle year of 2014-2016).

Source: Laclede, Missouri | County Health Rankings & Roadmaps

## Health Factors

Health factors represent those things that can be modified to improve the length and quality of life for residents. Health factors include health behaviors, clinical care, social and economic factors, and the physical environment. Physical environment characteristics in a community can be affected most by comprehensive planning, though policy changes can be explored to better health behaviors, clinical care, and social and economic factors.



The following tables indicate how Laclede County compares to both the State of Missouri and the United States regarding each of the health factors.

**TABLE A.2 HEALTH BEHAVIORS COMPARISON**  
**(LACLEDE COUNTY VS. MISSOURI VS. UNITED STATES)**

HEALTH BEHAVIORS	LACLEDE COUNTY	MISSOURI	UNITED STATES
Adult Smoking	25%	1%	16%
Adult Obesity	42%	34%	32%
Physical Inactivity	27%	25%	22%
Access to Exercise Opportunities	62%	76%	84%
Excessive Drinking	18%	20%	19%
Alcohol-Impaired Driving Deaths	13%	28%	27%

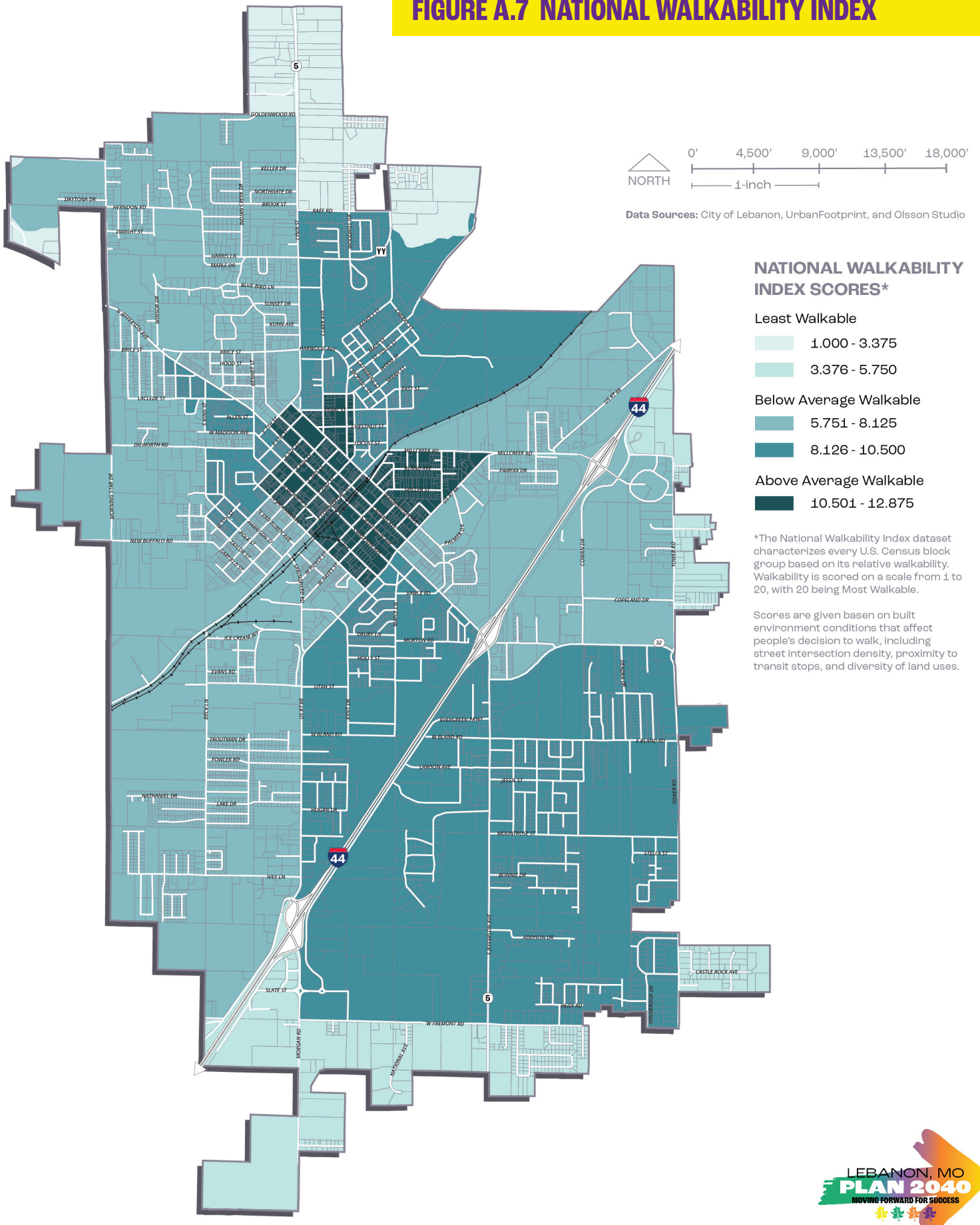
*Source: Laclede, Missouri | County Health Rankings & Roadmaps*

Exercise opportunities are often correlated with the “walkability” of a city. Walkability is a term for planning concepts best understood by the mixed use of amenities in higher-density neighborhoods where people can access said amenities by foot. Walkability is dependent on available pedestrian infrastructure.

The Walkability Index dataset characterizes every Census 2010 block group in the U.S. based on its relative walkability. Walkability depends upon characteristics of the built environment that influence the likelihood of walking being used as a mode of travel. The Walkability Index is based on the EPA’s previous data product, the Smart Location Database (SLD). A higher rating indicates higher walkability.

**Figure A.7 National Walkability Index** demonstrates the walkability of Lebanon. Most of the city has a moderate level of walkability, with downtown Lebanon exhibiting a higher level. This finding is in line with the denser street network within the core of the city, which contributes to better walkability.

# FIGURE A.7 NATIONAL WALKABILITY INDEX



The degree to which a place is walkable is typically determined by the physical environment and condition of the pedestrian network. However, there are other physical characteristics that may influence a person's desire to walk. These measurements are displayed in **Table A.3 Physical Environment Comparison (Laclede County vs. Missouri vs. United States)**.

**TABLE A.3 PHYSICAL ENVIRONMENT COMPARISON**  
(LACLEDE COUNTY VS. MISSOURI VS. UNITED STATES)

PHYSICAL ENVIRONMENT	LACLEDE COUNTY	MISSOURI	UNITED STATES
Air Pollution - Particulate Matter	7.3 µg	7.6 µg	7.4 µg
Severe Housing Problems	11%	13%	17%
Driving Alone to Work	80%	79%	73%
Long Commute - Driving Alone	25%	32%	37%

Laclede County does well in comparison to the State of Missouri and the United States on particulate matter in measured in the air. This metric is determined by the average daily density of fine particulate matter in micrograms per cubic meter. In Laclede County, an annual average of 7.3 micrograms per cubic meter of fine particulate matter was measured in the air. The Environmental Protection Agency (EPA) has primary annual average standards of 12.0 micrograms per cubic meter. Other metrics also indicate that those that live in Laclede County are less likely to suffer from severe housing problems and are slightly more likely to drive alone to work compared to the state and national rates.

**TABLE A.4 CLINICAL CARE COMPARISON**  
(LACLEDE COUNTY VS. MISSOURI VS. UNITED STATES)

CLINICAL CARE	LACLEDE COUNTY	MISSOURI	UNITED STATES
Uninsured	14%	12%	10%
Primary Care Physicians	1,890 : 1	1,410 : 1	1,310 : 1
Dentists	3,010 : 1	1,620 : 1	1,380 : 1
Mental Health Providers	650 : 1	430 : 1	340 : 1
Preventable Hospital Stays	2,521	3,052	2,809

In addition to walkability and the physical environment, other health factors can affect a person's state of well-being. **Table A.4 Clinical Care Comparison (Laclede County vs. Missouri vs. United States)** displays factors related to the clinical care available to a resident of Laclede County. In comparison to the State of Missouri and the United States, the county has higher ratios of citizens to primary care physicians, dentists, and mental health providers. This indicates that compared to state and national ratios, there are less of these healthcare professionals to take care of the county's residents.



## HELPFUL TERMS AND FACTS

**Social Vulnerability** refers to the resilience of communities (the ability to survive and thrive) when confronted by external stresses on human health, stresses such as natural or human-caused disasters or disease outbreaks. Reducing social vulnerability can decrease both human suffering and economic loss.

**Socially Vulnerable Populations** include those who have special needs, such as, but not limited to, people without vehicles, people with disabilities, older adults and people with limited English proficiency.

Census tracts are subdivisions of counties for which the Census collects statistical data. The SVI ranks each tract on 15 social factors, including poverty, lack of vehicle access, and crowded housing, and groups them into four related themes. Each tract receives a separate ranking for each of the four themes, as well as an overall ranking.

### **SVI Themes and Social Factors:**

- Socioeconomic status (below poverty, unemployed, income, no high school diploma)
- Household composition and disability (aged 65 or older, aged 17 or younger, older than age 5 with a disability, single-parent households)
- Minority status and language (minority, speak English “less than well”)
- Housing type and transportation (multi-unit structures, mobile homes, crowding, no vehicle, group quarters)

Source: U.S. Census

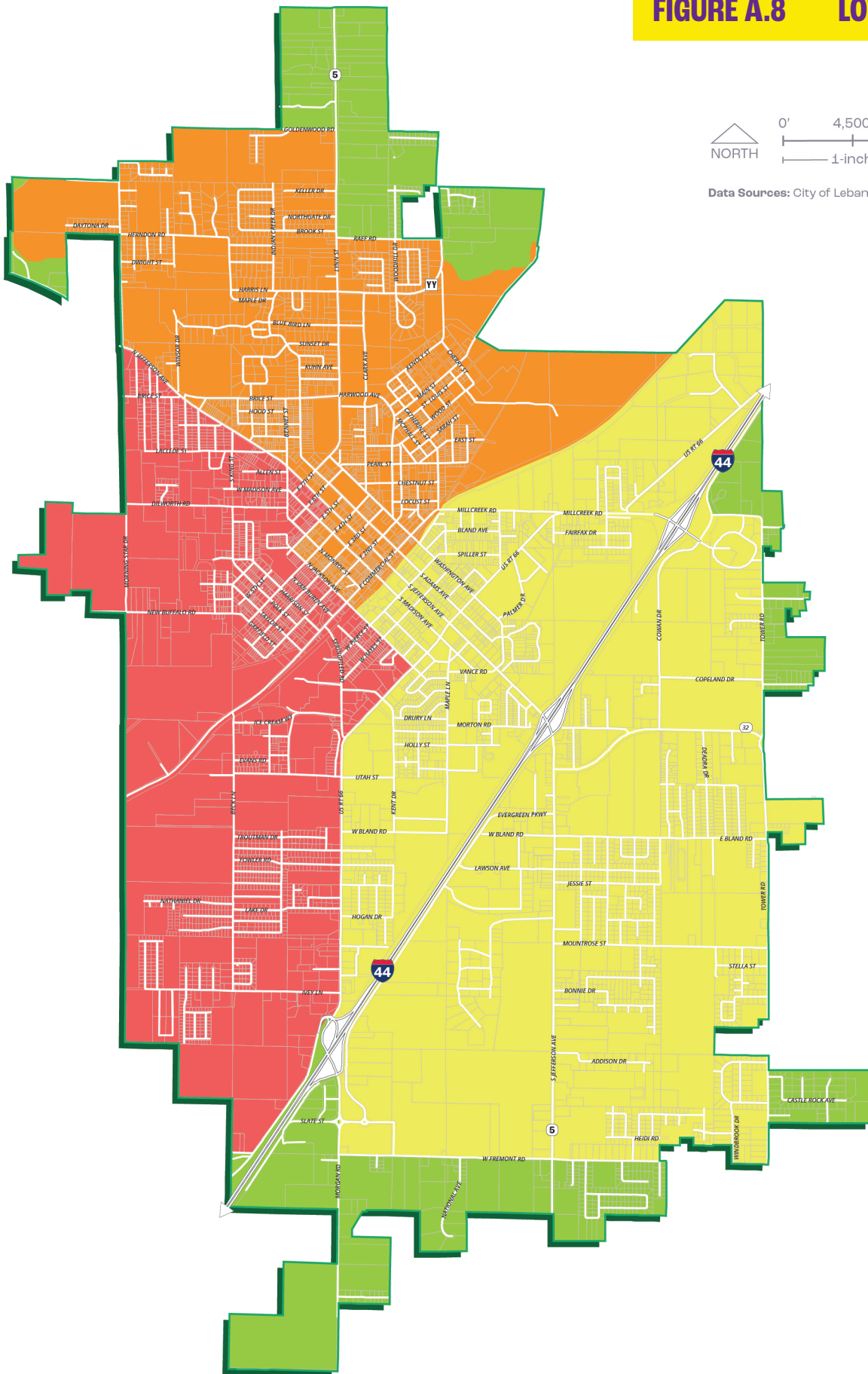
Furthermore, the rate of preventable hospital stays is lower than the state and national rates. Preventable hospital stays are determined by the rate of hospital stay for ambulatory-care sensitive conditions per 100,000 Medicare enrollees. In Laclede County, Missouri, 2,521 hospital stays per 100,000 people enrolled in Medicare might have been prevented by outpatient treatment.

## Poverty Index

The U.S. Department of Housing and Urban Development generates the Low Poverty Index (LPI), which captures the depth and intensity of poverty in a given neighborhood. The index uses both family poverty rates and public assistance receipt, in the form of cash-welfare, such as Temporary Assistance for Needy Families (TANF). The index is a linear combination of two vectors, the family poverty rate (pv) and the percentage of households receiving public assistance (pa). The poverty rate and public assistance for neighborhoods are determined at the census tract level. Values are inverted and percentile ranked nationally. The resulting values range from 0 to 100. The higher the score, the less exposure to poverty in a neighborhood.

As shown in **Figure A.8 Low Poverty Index**, the majority of the area found within Lebanon’s city limits indicates lower values on the LPI. The western portion of Lebanon is primarily between the 2.0 and 21.0 national percentile for poverty. The eastern portion, though lower, is within the 21.0-41.0 national percentile for poverty. Surrounding Lebanon, including on some of the fringes of the city limits, the LPI indicates that these areas are within the 41.0-61.0 national percentile for poverty. Overall, Lebanon is much more exposed to poverty than other communities across the United States.

# FIGURE A.8 LOW POVERTY INDEX



Data Sources: City of Lebanon, UrbanFootprint, and Olsson Studio

## LEGEND

City Limits

### LOW POVERTY INDEX SCORE\*

- 50
- 29
- 13
- 7

\*The Low Poverty Index is a national dataset maintained by the U.S. Department of Housing and Urban Development (HUD) that captures the intensity of poverty in each census tract. The index calculates scores for each tract based on family poverty rates and public assistance data. Scores range from 0 to 100. The higher the score, the less exposure to poverty in a tract.

These scores were most recently calculated in July 2020.

## Social Vulnerability

The Centers for Disease Control and Prevention's Social Vulnerability Index (SVI) uses U.S. Census data to determine the social vulnerability of every census tract. The SVI ranks each tract on 15 social factors, including poverty, lack of vehicle access and crowded housing, and groups them into four related themes. The SVI can help public health officials and local planners better prepare for and respond to emergency events like disease outbreaks or exposure to dangerous chemicals.

According to the SVI, Lebanon is in high range of social vulnerability. This indicates that based on the 15 social factors, residents within Lebanon are more likely to be at risk during a public health emergency.

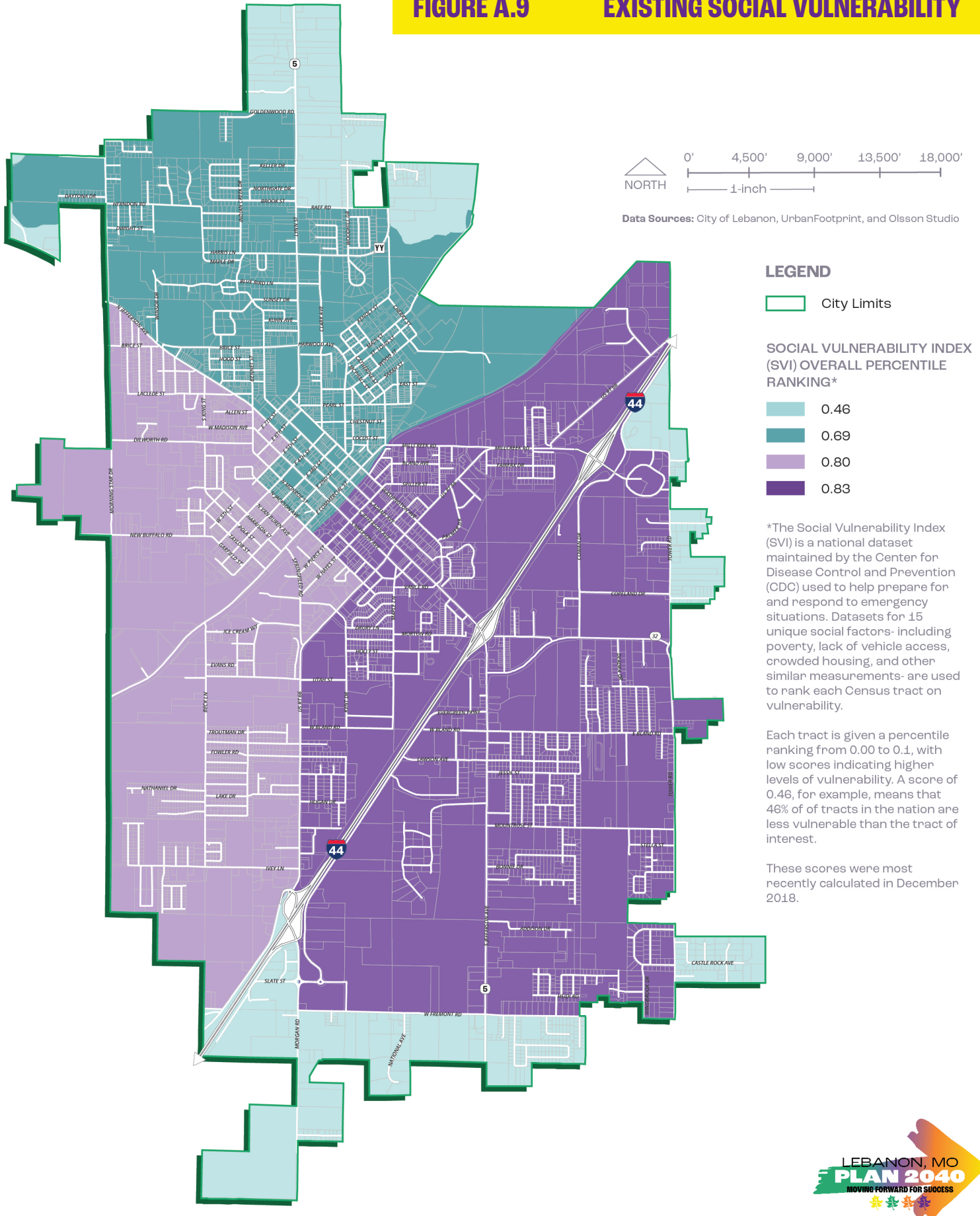
## KEY TAKEAWAYS

The range of low health factors places Laclede County in the lower middle range of counties in the State of Missouri (25 percent-50 percent). Furthermore, Laclede County ranked among the least healthy counties in Missouri in 2023 in Health Outcomes. Again, health outcomes represent how healthy a county is currently, in terms of length of life but also in quality of life as well. Laclede County largely scores lower/poorer than Missouri and the United States in most all health outcomes and only moderately better in some health factor metrics. Notably, Laclede County has a higher percentage of individuals who are obese, a lower availability of primary care physicians, dentists, and mental health providers, and lower physical activity levels.



**FIGURE A.9**

**EXISTING SOCIAL VULNERABILITY**



# EXISTING UTILITIES

To ensure the proper infrastructure for future development, redevelopment, or maintenance as the population grows, it is necessary to review the existing utility infrastructure within the city.

## WATER

The City of Lebanon provides water service to approximately 6,600 customers through 120 miles of distribution lines ranging from 6" to 12" in size with 1275 fire hydrants. The city operates seven deep wells, two booster pump stations, and five elevated water towers. The city provides water to most citizens within the city limits with an average day demand of 3 million gallons with a total well capacity of 6.4 million gallons per day. Public Water Supply Districts serve a few customers within the city limits. City of Lebanon has a territorial agreement with PWSD #3 for defined areas outside the current city limits.

## WASTEWATER

Wastewater services are provided by the City of Lebanon with approximately 120 miles of collection system piping, ranging from 8" to 36" in size and 47 pump stations with flows being treated by a 3.5-million-gallon-day extended aeration plant.

## STORMWATER

The City of Lebanon is a Missouri MS-4 community, with a stormwater permit issued by the Missouri Department of Natural Resources. The city has three drainage basins that generally flow out of the city. Goodwin Hollow in the west part of Lebanon with approximately 3,600 acres, Dry Auglaize northern Lebanon with approximately 3,850 acres and Cobb Creek in the southeast with approximately 2,500 acres. Stormwater conveyance includes drainage-ways, ditches, and piping. Many of the streets are curb and gutter with underground piping for conveyance. Lebanon has several detention facilities since the adoption of stormwater detention requirements for development in the mid-90s. Regional detention facilities are being constructed to compliment areas developed prior to 1990s.

## ELECTRIC

Lebanon provides electricity to approximately 7,300 customers through 135 miles of 7.2 Kv distribution and 40 miles of 69 kV transmission loop inter-connecting seven sub-stations to three 69 Kv transmission lines linking to the Sho-Me and Associated Electric Cooperative Transmission network. The city has received the Certificate of Excellence in Reliability from American Public Power Association for multiple years. Laclede Electric Cooperative serves a few areas that were annexed into the city many decades ago.

## NATURAL GAS

Summit Natural Gas provides natural gas to all customer classes in the City of Lebanon. Summit has recently invested capital in the distribution and transmission lines adding capacity to the system to assure adequate pressures during peak demand.

## TELECOMMUNICATIONS/BROADBAND

Telecommunication lines provide service with both underground and above-ground infrastructure. AT&T, Fidelity Communications, Bright Speed, Ozark Fiber, Socket Telecommunications, and Sho-Me Technologies provide some level of telecommunications and broadband services.



# EXISTING DEMOGRAPHICS

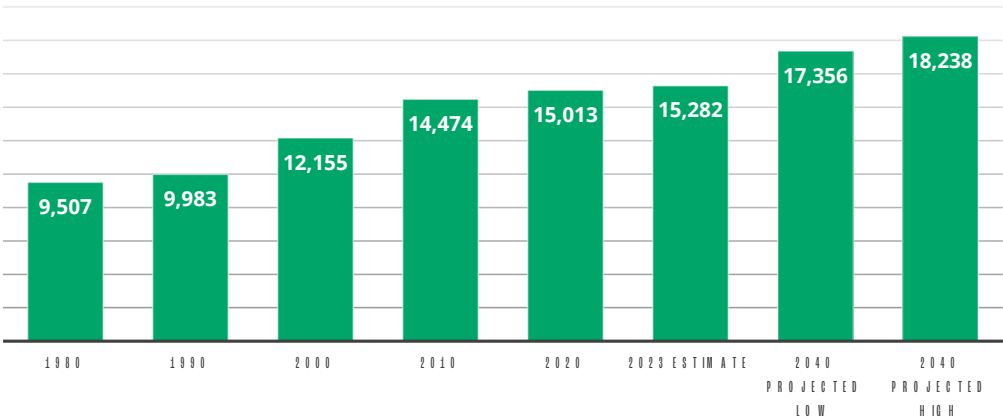
A city’s population and anticipated growth can influence the numbers of goods and services and alter consumer behavior within the local economy. Population characteristics such as age, household composition, education attainment, and income level can help a city estimate the number of resources, utilities, and homes it needs to provide in order to keep up with the population growth.

## POPULATION GROWTH

Lebanon’s population increased from approximately 8,616 in 1970 to 15,013 in 2020, exhibiting a growth rate of 74.2 percent. The city’s population increased by 10.3 percent during the 1980s, 5.0 percent during the 1990s, 21.8 percent in the 2000s, and 19.1 percent in the 2010s. From 2010 to 2020, the city’s population rose by only 3.7 percent. The large population growth over the 50-year period is mirrored by Laclede County’s growth rate of 78.4 percent during the same period, increasing in population from 19,944 to 36,039 in total. As the county seat, Lebanon experienced a large amount of this population increase. According the Economic and Market Analysis, the city’s population is estimated to be 15,282 people in 2023, accounting for 42.4 percent of the county total. This trend can be seen in *Figure A.10 Lebanon, Missouri Population Trends*.

The population for the City of Lebanon is forecasted to gain an additional 2,074 to 2,956 new residents, growing to a population between 17,356 and 18,238 by 2040.

**FIGURE A.10**      **LEBANON, MISSOURI POPULATION TRENDS**



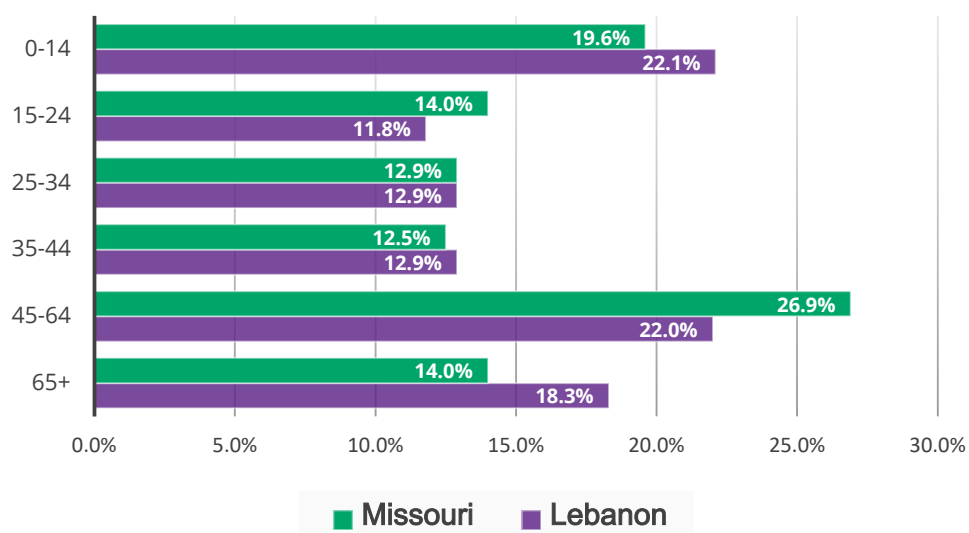
# POPULATION AGE

Age is an important indicator of consumer identity, community consumption patterns, housing needs and resident financial situations. **Figure A.11 Population by Age Comparison; 2023** provides a comparison of the Lebanon population and the Missouri population by the six primary age groups:

- Children (0-14 years),
- Adolescents (15-24 years),
- Young adults (25-34 years),
- Family/working adults (35-44 years),
- Empty nesters (45-64 years), and
- Elderly (65+ years).

According to the Economic and Market Analysis, the two largest age ranges within the Lebanon population are children (0-14 years old), with 22.1 percent, and empty nesters (45-64), with 22.0 percent of the total population. In addition, as illustrated in **Figure A.11**, Lebanon surpasses the statewide share of the elderly (65+) with Lebanon's elderly holding 18.3 percent of the total citywide population. In comparison, the statewide percent of elderly individuals is 14.0 percent of the total population. These findings indicate that Lebanon has a large portion of those over the age of 45 years old and a sizable portion of children. This may indicate a high potential for child-related goods and services, as well as a growing market for healthcare goods and services, senior housing, and downsized housing.

**FIGURE A.11 POPULATION BY AGE COMPARISON; 2023**



# HOUSEHOLD COMPOSITION

Household composition is important for understanding retail expenditures and housing needs seen within a community. According to the Economic and Market Analysis, there was an estimated 6,264 households residing in Lebanon with an average household size of 2.38 persons as of 2023. Family households account for 63.5 percent of all households, with 34.0 percent of households having children present

When compared to the State of Missouri, Lebanon possesses below average rates for family households; married couple households; and, married with children households. Conversely, Lebanon possesses above average rates of householders living alone and householders living alone who are aged 65 years and older. This household composition indicates a propensity for detached single-family housing. A comparison between the state and city percentages can be viewed in **Table A.5 Comparison of Households by Type (City of Lebanon vs. State of Missouri)**.

**TABLE A.5 COMPARISON OF HOUSEHOLDS BY TYPE**  
(CITY OF LEBANON VS. STATE OF MISSOURI)

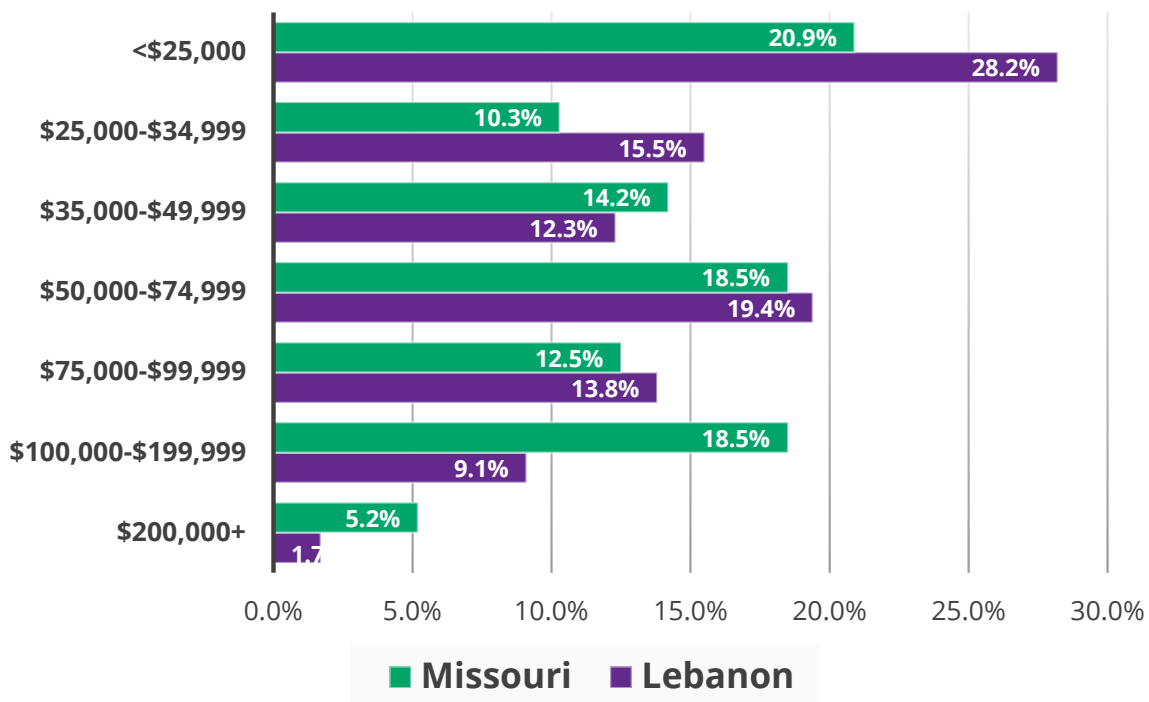
HOUSEHOLD TYPE	CITY OF LEBANON	STATE OF MISSOURI
Total Household	6,264	2,375,611
		1,410 : 1
Family Households	63.5%	65.3%
Married Couple Households	44.7%	48.4%
With Related Children	19.4%	20.7%
Other Family (No Spouse Present)	18.8%	16.7%
With Children Present	13.7%	11.0%
Householder Living Alone	31.1%	28.3%
Householder Living Alone 65+ Years Old	14.5%	11.9%
All Households with Children	34.0%	31.8%
Average Household Size	2.38	2.44
Average Family Size	3.02	3.00

**Source: Esri Business Analyst**

# HOUSEHOLD INCOME

Household income levels have a direct impact on retail expenditures, housing needs, for-sale housing values, and residential rents. A comparison of the household income distribution estimates for Lebanon and Missouri is shown in **Figure A.12 Household Income Distribution Comparison**.

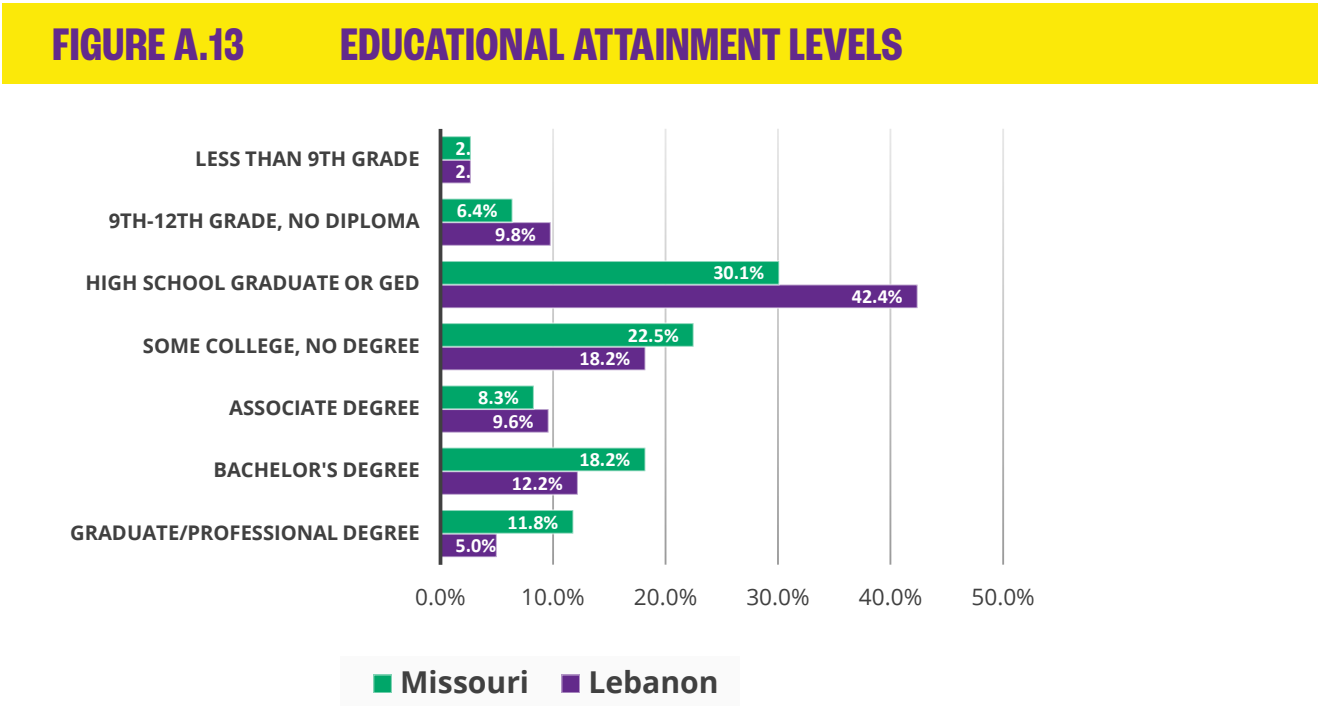
**FIGURE A.12 HOUSEHOLD INCOME DISTRIBUTION COMPARISON**



According to the Economic and Market Analysis, Lebanon's median household income of \$41,614 is less than the state median household income of \$54,596. Lebanon also has a greater rate of households earning less than \$35,000 and a much lower rate of high-income households earning \$100,000 or more. These lower income levels place a constraint on achievable retail sales and rents, housing values, and residential rents. An estimated 28.2 percent of Lebanon households earn less than \$25,000 annually, approximately eight percent higher than the 20.9 statewide percentage. This suggests an above average need for affordable and income-based housing. For more information concerning the household income distribution, please consult the Economic and Market Analysis in **Appendix D**.

# EDUCATIONAL ATTAINMENT

Educational attainment levels are an important indicator of a market area’s labor pool. These levels may also determine a community’s ability to attract and retain knowledge-based industries and the ability to support above average wages. Typically, the demand for retail space increases as household income and retail sale levels rise. A comparison of educational attainment levels between Lebanon and the State of Missouri are illustrated in *Figure A.13 Educational Attainment Levels*.



Lebanon’s population is less educated than the overall Missouri population with 26.8 percent of the population attaining an associate degree or higher compared to 38.3 percent statewide. Conversely, 54.9 percent of Lebanon residents attained a high school diploma or less compared to 39.2 percent of the statewide population. Lebanon’s below average educational attainment levels place a constraint on the potential to achieve above statewide average income levels, retail expenditures, and housing values and rents.

## KEY TAKEAWAYS

Lebanon experienced a 74.2 percent growth rate from 1970 to 2020, growing from approximately 8,616 to 15,013 persons. Estimates indicate that the City of Lebanon could grow to a population between 17,356 and 18,238 by 2040. The two largest age ranges within Lebanon's population are children (0-14 years old) and the elderly (65+). However, when compared to the State of Missouri, Lebanon possesses below average rates for family households; married couple households; and, married with children households. However, Lebanon possesses above average rates of householders living alone and householders living alone who are aged 65 years and older.

Lebanon has a greater rate of households earning less than \$35,000 and a much lower rate of high-income households earning \$100,000 or more when compared to statewide rates. Furthermore, Lebanon possesses below average educational attainment level. Both of these metrics place a constraint on the potential to achieve above statewide average income levels, retail expenditures, and housing values and rents.



# EXISTING EMPLOYMENT CONDITIONS

Employment conditions within a community are dependent on a variety of factors. A rise in employment can increase income levels, retail expenditures, and a community's population. As a result, job growth tends to be a reliable indicator of general economic conditions of a community and helps determine the demand for housing as well as commercial and industrial space. When searching for employment, households will consider affordable housing values and the length of commute times. Households tend to prefer locating near their place of work for convenience and choose communities with a higher quality of life. All these items can influence employment trends.

The following sections provide a brief overview of the existing employment conditions in the City of Lebanon and Laclede County. For more information considering employment conditions, please see the Economic and Market Analysis in Appendix D.

## EMPLOYMENT TRENDS

According to the U.S. Bureau of Labor Statistics, Laclede County grew at a modest rate from 14,122 jobs in 2011 to a peak in 2018 of 16,165 jobs. This was with an unemployment rate of 3.7 percent. However, the COVID-19 pandemic reversed the almost decade long employment growth. With a loss of 651 jobs in 2020, the unemployment rate increased to a high of 8.3 percent. Through May 2023, Laclede County added 1,017 jobs to the local job market, bringing the total to 16,470. These employment trends are illustrated in **Figure A.14** *Employment Trends (Laclede County)*.

**FIGURE A.14** **EMPLOYMENT TRENDS (LACLEDE COUNTY)**



Compared to the statewide and national rates, unemployment in Laclede County trended higher from 2010 to 2017. In 2018, this rate performed at or near the levels for both Missouri and the United States. However, the pandemic inflated the county's unemployment rate to 8.3 percent in 2020. This was much higher than the 4.4 percent for Missouri and the 6.7 percent for the nation. By the end of 2022, this unemployment rate showed significant improvement, dropping to 2.5 percent, as evidenced in **Table A.6 Unemployment Rate Comparison**. This was better than the statewide rate of 2.7 percent and the national rate of 3.5 percent.

**TABLE A.6 UNEMPLOYMENT RATE COMPARISON**

YEAR	LACLEDE COUNTY	STATE OF MISSOURI	UNITED STATES
2010	12.4%	9.4%	9.3%
2011	11.3%	7.8%	8.5%
2012	9.3%	7.0%	7.9%
2013	9.6%	6.6%	6.7%
2014	8.1%	5.7%	5.6%
2015	6.3%	4.5%	5.0%
2016	5.5%	4.3%	4.7%
2017	4.8%	3.5%	4.1%
2018	3.7%	3.2%	3.9%
2019	6.9%	3.5%	4.1%
2020	8.3%	4.4%	6.7%
2021	2.9%	3.9%	3.9%
2022	2.5%	2.7%	3.5%

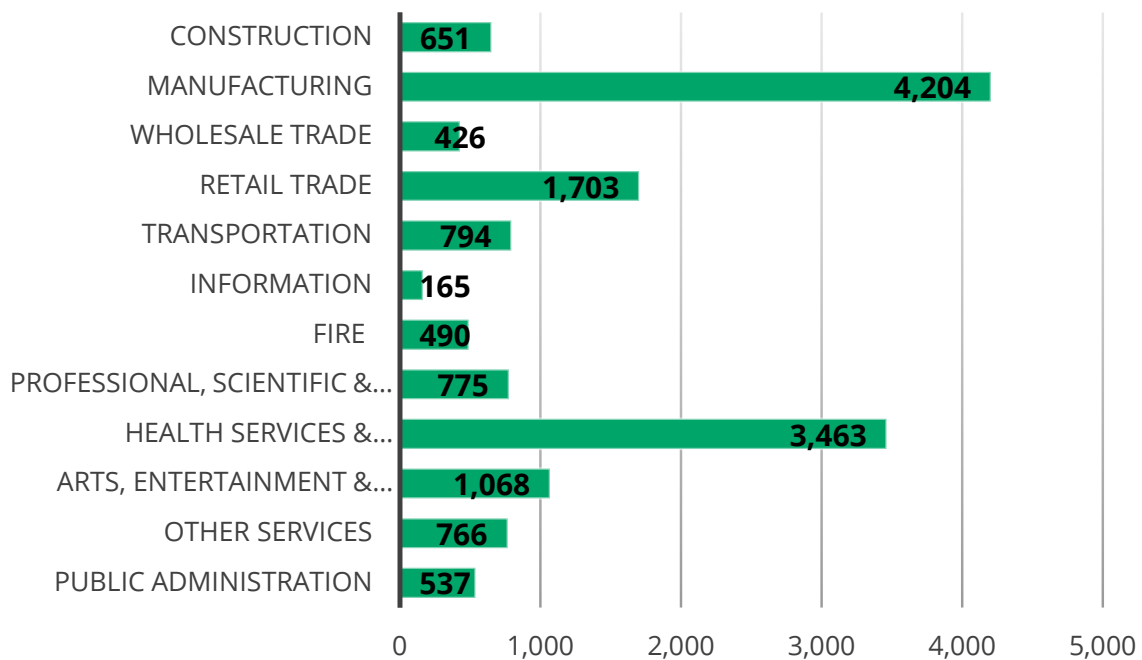
*Source: U.S. Bureau of Labor Statistics*

## MAJOR EMPLOYERS

The composition of a community's employment base influences income levels and the composition of housing and commercial space needs. High levels of white-collar occupations such as professional, management, and administrative; information; and financial, insurance, and real estate typically generate demand for owner-occupied housing, upscale rentals, and professional office space. Meanwhile, other employment sectors such as construction; manufacturing; wholesale trade; retail trade; and transportation, warehousing and utilities tend to create a need for market-rate rental housing and industrial space.

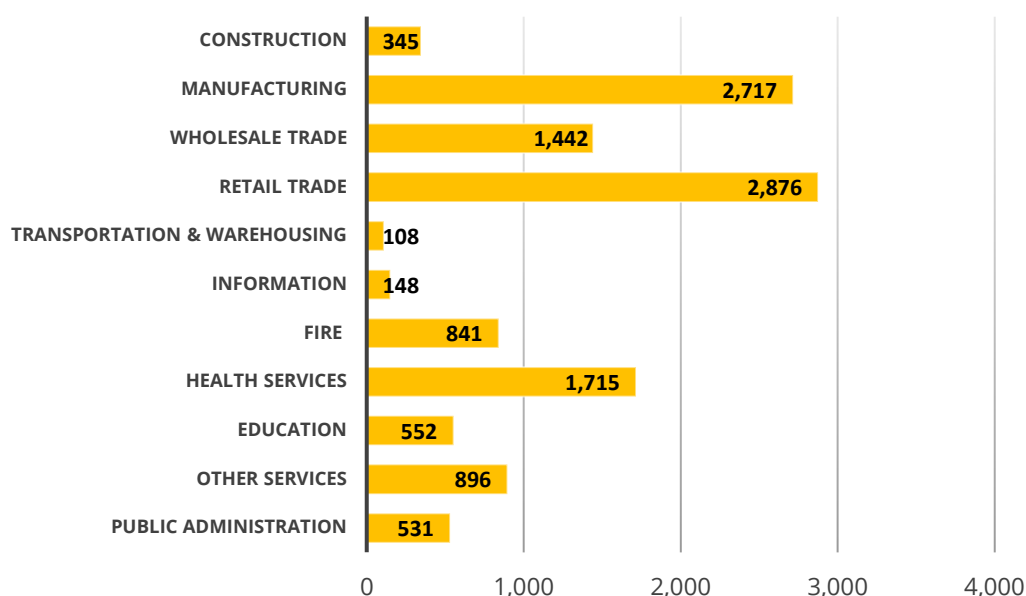
According to the Economic and Market Analysis, leading employment sectors in Laclede County include manufacturing (4,204 jobs); healthcare and education (3,463); retail trade (1,703); arts, entertainment, and accommodations (1,068), and transportation (794). These employment numbers are illustrated in **Figure A.15 Employment by Sector (Laclede County)**.

**FIGURE A.15      EMPLOYMENT BY SECTOR (LACLEDE COUNTY)**



Since it serves as Laclede County's principal economic center, and is the designated county seat, Lebanon accounts for approximately 13,611 jobs, or about 82.6 percent of the county total. The lead sectors within Lebanon's job market are retail trade (2,876); manufacturing (2,717); healthcare services (1,715); and wholesale trade sectors (1,442). These employment numbers for Lebanon are illustrated in **Figure A.16 Employment by Sector (Lebanon, Missouri)**.

**FIGURE A.16 EMPLOYMENT BY SECTOR (LEBANON, MISSOURI)**



Industrial-related jobs account for 31.3 percent of Lebanon's total employment, compared to 28.1 percent statewide. Retail trade and healthcare account for 21.1 percent and 12.6 percent, respectively. The diversity of these employment sectors generate the need for a wide range of owner-occupied and rental housing types and price points.

Major employers include manufacturing and industrial companies like Tracker Marine, Merson Climate Technologies, and Barrel Manufacturer. Others include the Lebanon R-III District and Mercy Hospital. These and other employers are listed in **Table A.7 Major Employers (Lebanon, Missouri)**.

Additionally, tourism has an important impact on the economy in Laclede County. According to the State of Missouri, annual visitor spending in Laclede County totaled \$71.5 million and creating 1,281 jobs during the fiscal year of 2022. The Lebanon Tourism Department promotes tourism in Lebanon through marketing and outreach, including the operation of a website that offers travel information on attractions, events, lodging, shopping, places to dine, and event venues.

## KEY TAKEAWAYS

The COVID-19 pandemic in 2020 reversed a decade long growth in Laclede County's employment. There was a loss of approximately 651 jobs, increasing the unemployment rate to 8.3 percent. However, since then the unemployment rate has lowered to 2.5 percent, with the county seeing a health increase of jobs.

Lebanon accounts for approximately 13,611, or about 82.6 percent, of the total jobs in Laclede County. From 2023 through 2040, job growth in Laclede County is projected to increase at an average annual rate of 0.5 percent to 0.7 percent. This increase is expected to yield an estimated 1,531 to 2,181 jobs by 2040. Since Lebanon is the county's principal employment center, 75 percent to 80 percent of the countywide job growth, between 1,148 to 1,745 jobs, is expected to occur within the city. The lead sectors within Lebanon's job market are retail trade (2,876); manufacturing (2,717); healthcare services (1,715); and wholesale trade sectors (1,442). The high rate of healthcare, manufacturing, and industrial-related jobs generates the need for a wide-range of owner-occupied and rental housing types and price points.

**TABLE A.7 MAJOR EMPLOYERS (LEBANON, MISSOURI)**

EMPLOYER	TYPE OF BUSINESS	# OF JOBS
Tracker Marine	Boat Manufacturer	1,200
Emerson Climate Technologies	Compressors for HVAC Industry	900
Lebanon R-III School District	Education	667
Mercy Hospital	Healthcare	661
Missouri Cooperage	Barrel Manufacturer	570
The Durham Company	Electrical Component Manufacturer	380
G-3 Boats	Boat Manufacturer	350
Lowe Boats	Boat Manufacturer	325
Marine Electrical Products	Marine Electrical Components	285
Detroit Toll Metal Products	Metal Fabrication	253
Regal Beloit	Electric Motor Manufacturer	170
DT Engineering	Full-Service Engineering	122

Source: Lebanon-REDI

# RESIDENTIAL HOUSING MARKET

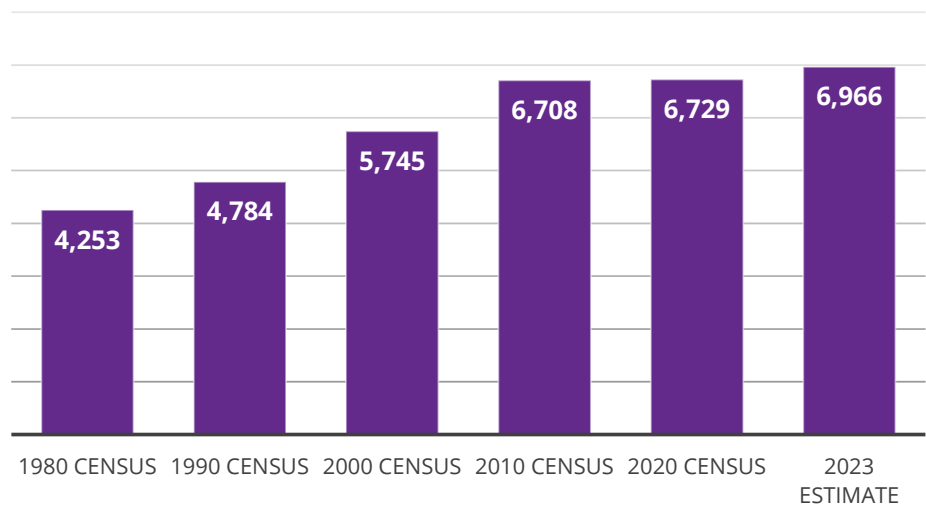
An evaluation of a residential housing market is important to identify current and future opportunities to support new housing stock. This section provides an overview of the housing market within Lebanon, including housing types, housing values, and renter owner-occupied housing sales activity.

## HOUSING STOCK AND INVENTORY

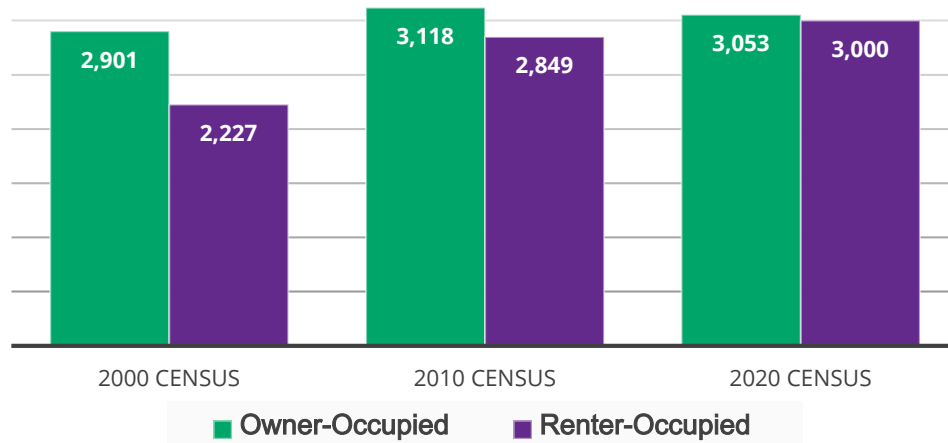
In 1980, the Lebanon housing stock was recorded in the Census at 4,253 dwelling units. By 2010, this number increased by 57.7 percent to 6,708 dwelling units. The highest growth period was between 2000 to 2010 with an additional 963 new housing units being added to the housing stock. From 2010 through 2020, the city's housing stock increased by only 21 dwelling units. According to the Economic and Market Analysis, Lebanon has an estimated 6,966 dwelling units in its housing inventory.

In 2000, 5,312 housing units were occupied in Lebanon, including 2,905 owner-occupied units and 2,227 renter-occupied units. From 2000 to 2010, the number of owner-occupied housing units in Lebanon increased by 7.5 percent to 3,118 units. The inventory of renter-occupied housing units increased by 27.9 percent to 2,849 housing units. From 2010 through 2020, the housing tenure for Lebanon decreased by 65 owner-occupied housing units and increased by 151 renter-occupied housing units.

**FIGURE A.17      HOUSING UNITS (LEBANON, MISSOURI)**



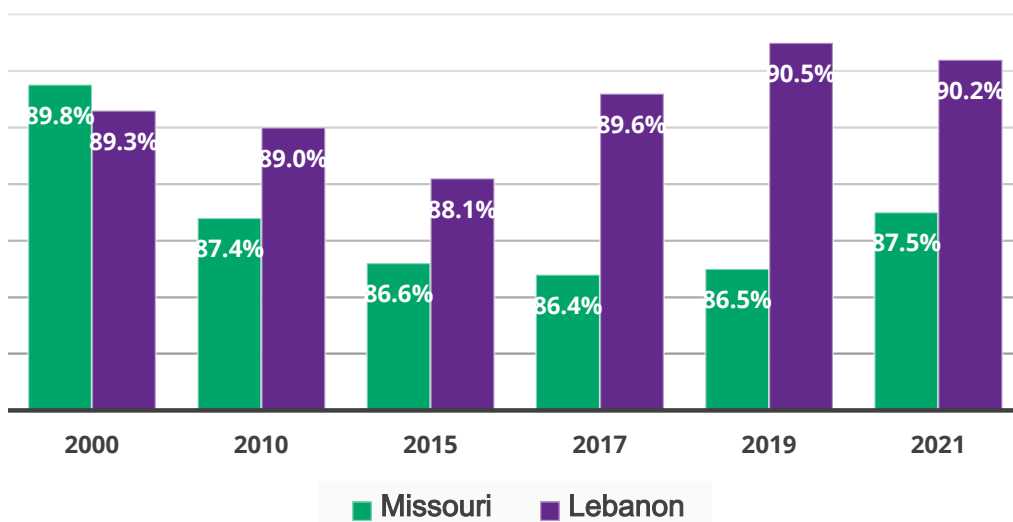
**FIGURE A.18 HOUSING TENURE TRENDS (LEBANON, MISSOURI)**



According to the Economic and Market Analysis, Lebanon's growing rental housing market is due to the fact that 43.7 percent of households possess annual household incomes under \$35,000 and may be perpetual renters. These residents are also more likely to contend with tighter mortgage lending requirements.

The U.S. Census reported the overall occupancy rate for existing housing in Lebanon declined slightly from 89.3 percent in 2000 to 89.0 percent by 2010. By 2021, this occupancy rate improved to a high of 90.2 percent. This was higher than the statewide average of 87.5 percent. These occupancy rates are illustrated in **Figure A.19 Housing Occupancy Rate Comparison**.

**FIGURE A.19 HOUSING OCCUPANCY RATE COMPARISON**



**Table A.8 Housing Stock by Year Built, 2021 (Lebanon, Missouri)** compares the age of the housing stock in Lebanon with that of the State of Missouri as reported by the U.S. Census Bureau for 2021.

**TABLE A.8 HOUSING STOCK BY YEAR BUILT, 2021 (LEBANON, MISSOURI)**

YEAR STRUCTURE BUILT	# OF UNITS	% OF TOTAL	MISSOURI
Total Housing Units	6,628		2,807,632
Built 2020 or Later	0	0.0%	0.6%
Built 2010 to 2019	32	0.5%	8.3%
Built 2000 to 2009	1,522	23.6%	13.4%
Built 1990 to 1999	963	14.5%	12.6%
Built 1980 to 1989	890	13.4%	11.8%
Built 1970 to 1979	749	11.3%	14.7%
Built 1960 to 1969	756	11.4%	11.2%
Built 1950 to 1959	710	10.7%	9.6%
Built 1940 to 1949	712	10.7%	4.5%
Built 1939 or Earlier	294	4.4%	13.2%

*Source: U.S. Census*

The city's housing stock is slightly newer than the statewide inventory. Homes built since 1980 account for 52.0 percent of Lebanon's existing inventory and 25.8 percent built prior to 1960. According to the Economic and Market Analysis, individuals have purchased housing in older neighborhoods, renovated the homes, and sold them for a profit. These older parts of the city surrounding downtown have been targeted given the age, condition, and pricing of the housing stock. The constraints for infill housing include the poor condition of many older homes as well as the large gap in the price of older homes compared to newer construction.

Lebanon's housing stock mix is influenced by its rural character whereby the demand for single-family housing exceeds that for attached rental housing. Detached single-family housing accounts for 64.0 percent of the housing stock in Lebanon compared to the statewide rate of 70.5 percent.

Multi-family housing accounts for 22.9 percent of Lebanon's housing stock compared to 20.2 percent for Missouri. Large-scale properties in Lebanon with 20 or more dwelling units' total 4.9 percent of the housing stock, compared to 5.2 percent statewide.

**TABLE A.9 HOUSING STOCK BY TYPE, 2021 (LEBANON, MISSOURI)**

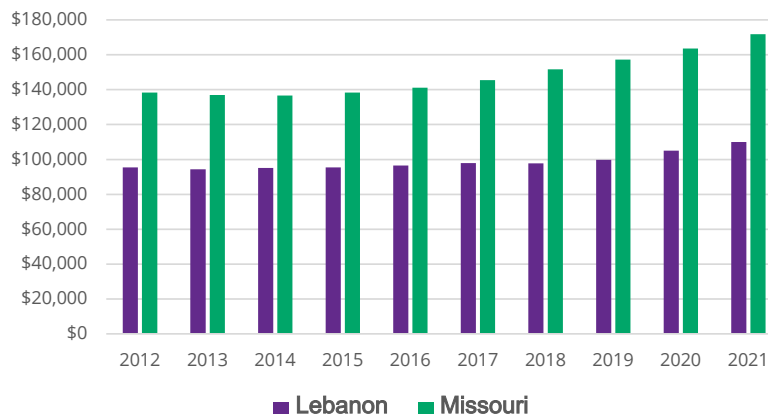
UNITS IN STRUCTURE	# OF UNITS	% OF TOTAL	MISSOURI
1-Unit, Detached	4,241	64.0%	70.5%
1-Unit, Attached	487	7.3%	3.6%
2 Units	461	7.0%	3.3%
3 or 4 Units	368	5.6%	4.6%
5 to 9 Units	96	1.4%	3.7%
10 to 19 Units	264	4.0%	3.4%
20+ Units	327	4.9%	5.2%
Mobile Home	384	5.8%	5.7%
Boat, RV, Van, etc.	0	0.0%	0.1%
Total Housing Units	6,628	100%	100%

Source: U.S. Census Bureau

## HOUSING VALUES

Lower housing values are common among rural communities given an older housing stock and below average household income levels. Stemming from the national housing bust, the median housing value for both Lebanon and the State of Missouri declined steadily from 2010 to 2013. According to the American Community Survey, in 2012 the median housing value in Lebanon was \$95,400. This lagged behind the statewide median of \$171,800. A comparison of housing values is available in **Figure A.20 Housing Value Comparison; 2021**.

**FIGURE A.20 HOUSING VALUE COMPARISON; 2021**  
(CITY OF LEBANON VS. STATE OF MISSOURI)



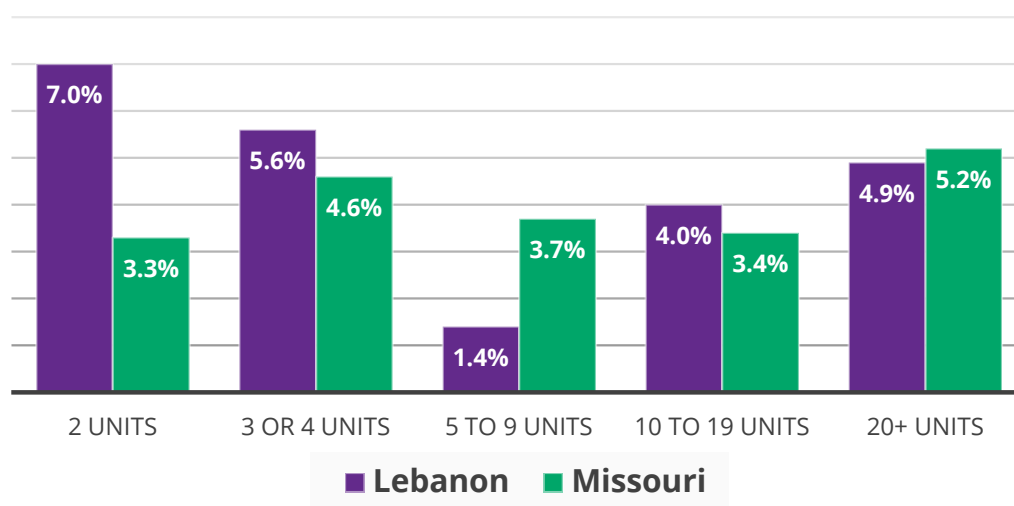
An estimated 45 percent of the owner-occupied housing stock in Lebanon is valued under \$100,000, compared to just 23.5 percent statewide. Meanwhile, housing valued at more than \$200,000 accounts for 17.1 percent of Lebanon's housing stock compared to 41.4 percent statewide. The price range for first-time homebuyers generally ranges from \$175,000 to \$250,000. Given the cost of land, infrastructure, and construction, it can be difficult to meet the need for first-time home buyers. Single-family homes located outside of the city limits in Laclede County tend to be on more land, larger in size, and priced much higher than homes located within Lebanon.

## APARTMENT MARKET

According to the American Community Survey 2021, Lebanon's housing stock totaled 6,628 dwelling units. Of this total, 22.9 percent, or 1,516 dwelling units, were in multi-unit structures. By comparison, this is slightly higher than the statewide rate of 20.2 percent.

Large-scale properties with 20 or more dwelling units account for 4.9 percent of Lebanon's housing stock, slightly lower than the 5.2 percent statewide. Properties with 10 to 19 units account for 4.0 percent of Lebanon's housing stock, higher than the statewide 3.4 percent. Duplexes account for 7.0 percent of the Lebanon housing stock compared to 3.3 percent for Missouri. Properties with 3 to 9 housing units account for 7.0 percent of Lebanon's housing stock, compared to 8.3 percent statewide. **Figure A.21 Comparison of Multi-Family Housing Stock**, illustrates the comparison between statewide and local rates.

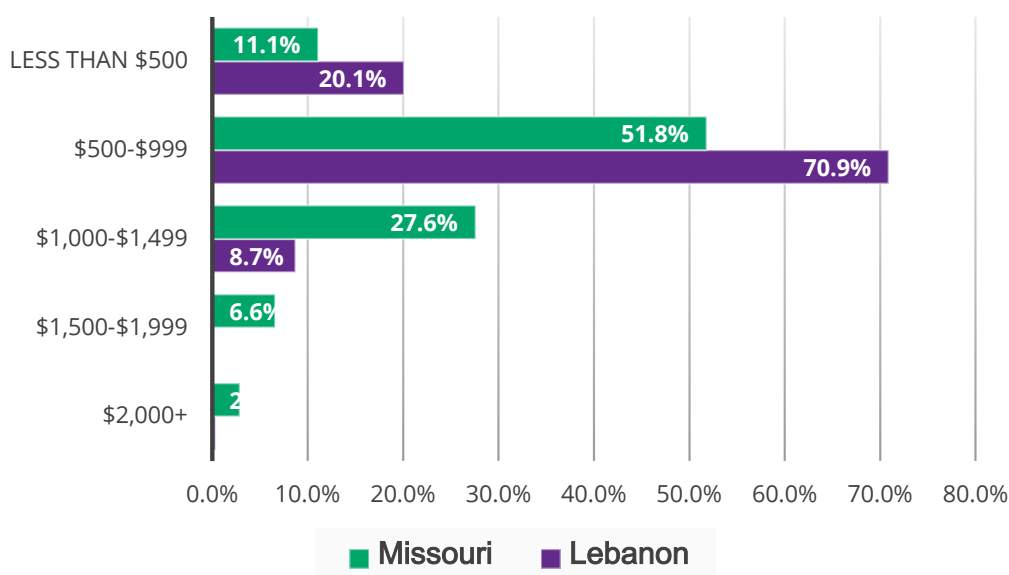
**FIGURE A.21**      **COMPARISON OF MULTI-FAMILY HOUSING STOCK**  
(CITY OF LEBANON VS. STATE OF MISSOURI, 2021)



## Market-Rate and Income-Based Rental Housing

Of Lebanon's occupied rental housing units, 20.1 percent rented for less than \$500 per month compared to 11.1 percent statewide. This disparity in rents suggests Lebanon has a large need for affordable and income-based rental housing. An estimated 70.9 percent of the Lebanon rental housing stock garners rents of \$500 to \$999 per month. This is much higher than the 51.8 percent statewide. Housing units renting for \$1,000 to \$1,499 account for just 8.7 percent of Lebanon's rental market while 27.6 percent of the housing stock rents for excess of \$2,000 per month.

**FIGURE A.22 MONTHLY HOUSING RENTS (LEBANON VS. MISSOURI)**



According to the Economic and Market Analysis, there are three large-scale, market-rate apartment properties totaling 158 units that operate in Lebanon. These properties include Britli Estates, the largest market-rate apartment property in Lebanon that was built in 2010 with a total of 102 units; the Highlands, a 32-unit property with one-bedroom and two-bedroom units; and, Lebanon Oaks Apartments, a 24-unit property with one-bedroom and 2-bedroom units. There are also ten income-based properties, including 242 family units and 259 senior housing units. In 2023, 65-units in Vernon Heights and Madison Manor, properties with income-based senior housing, were renovated. The breakdown of these properties according to their number of units and the year they were built is included in **Table A.10 Lebanon Market-Rate and Income-Based Rental Apartment Properties on page A42.**

An estimated 17.5 percent of Lebanon households earn less than \$15,000 per year compared to 11.0 percent statewide. This indicates a need for income-based rental assistance. In Lebanon, affordable housing assistance takes the form of Section 42 Low-Income Housing Tax Credit Program and the Department of Housing and Urban Development's ("HUD") subsidized housing through its Section 8 Housing Choice Voucher Program.

**TABLE A.10 LEBANON MARKET-RATE AND INCOME-BASED RENTAL APARTMENT PROPERTIES**

UNITS IN STRUCTURE	YEAR BUILT	# OF UNITS
Market-Rate Properties		
Britli Estates	2010	102
Lebanon Oaks Apartments	1994	24
The Highlands	1998	32
Income-Based Family Housing		
Lebanon Sundance Apartments	1999	40
The Timbers	1973	130
Timber Creek Estates	2009	36
Lebanon Heights		36
Income-Based Senior Housing		
750 Main Street	1991	24
Monroe Estates	1980	74
Tower Village	2018	36
Lebanon Senior Apartments 1	2008	36
Lebanon Senior Apartments 2	2012	24
Vernon Heights and Madison Manor	2023*	65
Grand Total Units		659

*Notes: \*Denotes property renovated in 2023.*

**Source: U.S. Census Bureau**

According to the Economic and Market Analysis, the high number of low-income and senior populations in Lebanon, as well as the modest inventory of income-based family and senior rental units, indicates a significant market supply imbalance. The City of Lebanon recently put out a Request for Proposals (RFP) for additional housing. In response, a partnership between Bridge Builder and AHDVS, LLC is planning to develop an affordable rental housing community in Lebanon featuring 50 single-family homes and a multi-amenity clubhouse. The city is partnering with the developers by providing site infrastructure to the site. A second phase consisting of an additional 50 single-family homes is being considered given the high level of demand for income-based rental housing in Lebanon.

## KEY TAKEAWAYS

Lebanon has an estimated 6,966 dwelling units in its housing inventory, with a high growth period occurring between 2000 to 2010. In recent years, Lebanon's rental housing market has grown. This may be due to the fact that 43.7 percent of households possess annual household incomes under \$35,000 and may be perpetual renters. Detached single-family housing accounts for 64.0 percent of the total housing stock in Lebanon, with much of the stock being slightly newer than the statewide inventory. Approximately 22.9 percent of Lebanon's housing inventory, or 1,516 dwelling units, were in multi-unit structures such as multiplexes, apartment complexes, or similar structures.

Among Lebanon's occupied rental housing units, 21.1 percent rent for less than \$500 per month compared to 11.1 percent statewide. This suggests a larger need for affordable and income-based rental housing when paired with the high number of low-income and senior populations present in Lebanon. Approximately 17.5 percent of Lebanon households earn less than \$15,000 per year compared to 11.0 percent statewide.

## RETAIL, OFFICE, AND INDUSTRIAL MARKETS

The following subsections provide an overview for the retail, office, and industrial submarkets within Lebanon. For a more detailed analysis of these markets, please refer to the Economic and Market Analysis in **Appendix D**.

### RETAIL MARKET OVERVIEW

As the largest city in Laclede County, Lebanon serves as the county's principal shopping destination. According to the Market and Economic Analysis, there are 92 properties in Lebanon, totaling 1.5 million square feet of commercial space. Downtown Lebanon encompasses a six block area along Commercial Street from Van Buren Avenue north to Washington Avenue. It serves as the city's original business district and still supports a large retail presence within the community. Downtown maintains approximately 380,000 square feet of ground floor commercial space and hosts 82 businesses. Prominent retail businesses include hair salons and barbers, restaurants, boutiques and clothing stores, photo studios, and dance studios. Two new businesses, Boat Town Brewing and Jude's Coffee, are scheduled to open soon in the downtown area.

Alternative retail districts have emerged along the Jefferson Avenue corridor with concentrations of businesses both north and south of the Interstate 44 interchange. Businesses located at this location include Walgreens, Aldi, King Cash Saver, Price Chopper Plus, True Value, Applebee's, and several bank

branches and fast-food restaurants. A newer retail hub has emerged along Jefferson Avenue from Interstate 44 south to Bland Road. This retail node is highlighted by the 131,127 square foot Lebanon Marketplace, and anchored by Big Lots, Tractor Supply, Harbor Freight, Ashley Outlet, Shoe Sensation, Napa, and Petsense. Other notable retailers operating along the south Jefferson Avenue corridor include Lowe's, Walmart, Hibbett Sport, Factory Connection, Cato, and Dollar Tree.

Since 2019, Lebanon's retail space has operated at a vacancy rate well below market equilibrium with annual vacancy rates ranging from just 4.0 percent to 6.3 percent. During the first half of 2023, the Lebanon retail market absorbed 35,716 square feet of occupied space, reducing the overall vacancy rate to 3.9 percent. This is illustrated in **Table A.11 Retail Market Trends (Lebanon, Missouri)**. The modest inventory of vacant retail space in Lebanon available for occupancy is a barrier for attracting prospective retail businesses.

**TABLE A.11 RETAIL MARKET TRENDS (LEBANON, MISSOURI)**

YEAR	# OF PROPERTIES	INVENTORY SQ. FT.	VACANT SPACE	VACANCY RATE	NET ABSORPTION
2010	86	1,425,635	36,195	2.5%	0
2011	86	1,425,635	36,995	2.6%	-800
2012	88	1,444,357	50,525	3.5%	5,192
2013	88	1,444,357	49,601	3.4%	924
2014	88	1,444,357	77,982	5.4%	-28,381
2014	89	1,453,563	79,587	5.5%	7,601
2016	89	1,453,563	57,215	3.9%	22,372
2017	90	1,462,668	58,019	4.0%	8,301
2018	91	1,465,668	185,546	12.7%	-124,527
2019	91	1,465,668	80,918	5.5%	104,628
2020	91	1,465,668	82,110	5.6%	-1,192
2021	91	1,465,668	58,124	4.0%	23,986
2022	92	1,467,935	93,141	6.3%	-32,750
2023 Q2	92	1,467,935	57,425	3.9%	35,716

*Source: CoStar*

According to the Economic and Market Analysis, Lebanon's retail market is considered to be narrow and shallow, lacking in areas such as men's clothing, high-end grocery, sit-down restaurants, and entertainment. Residents must travel outside of Lebanon to satisfy many of their shopping needs and may travel within a one-hour drive to such retail destinations as Lake of the Ozarks and Springfield.

# OFFICE MARKET OVERVIEW

Office-related employment in the information, professional services, legal services, and finance, insurance, and real estate sectors account for 9.2 percent of Lebanon's total employment, compared to 21.4 percent of total employment in Missouri.

There are 23 properties in Lebanon that total approximately 237,884 square feet of professional and medical office space. The Jefferson Avenue corridor and downtown serve as the prominent office districts within the city. **Table A.12 Office Market Trends (Lebanon, Missouri)** summarizes these trends from 2010 through the second quarter of 2023.

**TABLE A.12 OFFICE MARKET TRENDS (LEBANON, MISSOURI)**

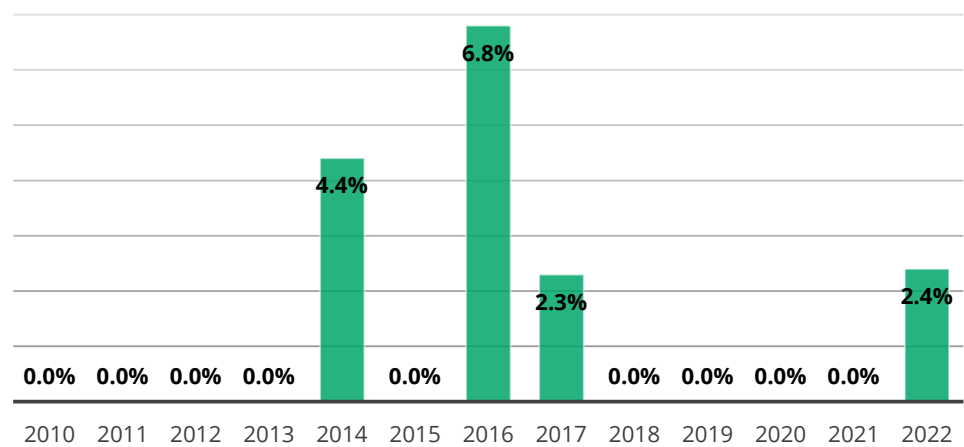
YEAR	# OF PROPERTIES	INVENTORY SQ. FT.	VACANT SPACE	VACANCY RATE	NET ABSORPTION
2010	23	237,884	0	2.5%	0
2011	23	237,884	0	2.6%	-800
2012	23	237,884	0	3.5%	5,192
2013	23	237,884	0	3.4%	924
2014	23	237,884	10,500	5.4%	-28,381
2014	23	237,884	0	5.5%	7,601
2016	23	237,884	16,070	3.9%	22,372
2017	23	237,884	5,570	4.0%	8,301
2018	23	237,884	0	12.7%	-124,527
2019	23	237,884	0	5.5%	104,628
2020	23	237,884	0	5.6%	-1,192
2021	23	237,884	100	4.0%	23,986
2022	23	237,884	5,680	6.3%	-32,750
2023 Q2	23	237,884	0	3.9%	35,716

Source: CoStar

Office properties have operated at full occupancy for the most part of the past decade. By the end of 2022, the overall vacancy rate was reported at 2.4 percent. However, by the second quarter of 2023, the market was again operating at full occupancy. The absence of vacant office space available for immediate occupancy serves as a barrier to accommodating the expansion of existing tenants or attracting new businesses to Lebanon.

According the Economic and Market Analysis, the City of Lebanon is estimated to support the need for 37,000 to 62,000 square feet of professional office space and 20,900 to 28,500 square feet of medical office space through 2040.

**FIGURE A.23**      **OFFICE SPACE VACANCY RATE TRENDS**  
(CITY OF LEBANON, MISSOURI)



## INDUSTRIAL MARKET OVERVIEW

Industrial-related employment in Lebanon totals 4,267 jobs in the manufacturing, wholesale trade, and transportation and warehouse sectors, or 31.3 percent of total employment. By comparison, industrial-related jobs account for 28.1 percent of employment in Missouri.

The largest concentrations of industrial space are south of downtown along the railroad line and within the Interstate 44 corridor near the three interchanges servicing Lebanon. Notable industrial businesses operating in Lebanon include Tracker Marine, Emerson Climate Technologies, Missouri Cooperage, Durham Company, G-3 Boats, and Lowes Boats. *Table A.13 Industrial Market Trends (Lebanon, Missouri)* summarizes these trends from 2010 through the second quarter of 2023.

**TABLE A.13 INDUSTRIAL MARKET TRENDS (LEBANON, MISSOURI)**

YEAR	# OF PROPERTIES	INVENTORY SQ. FT.	VACANT SPACE	VACANCY RATE	NET ABSORPTION
2010	28	816,800	0	0.0%	0
2011	28	816,800	0	0.0%	0
2012	28	816,800	7,244	0.9%	-7,244
2013	28	816,800	7,244	0.9%	0
2014	28	816,800	0	0.0%	7,244
2014	28	816,800	0	0.0%	0
2016	28	816,800	0	0.0%	0
2017	28	816,800	0	0.0%	0
2018	28	816,800	0	0.0%	0
2019	28	816,800	0	0.0%	0
2020	28	816,800	0	0.0%	0
2021	28	816,800	0	0.0%	0
2022	28	816,800	0	0.0%	0
2023 Q2	28	816,800	0	0.0%	0

Source: CoStar

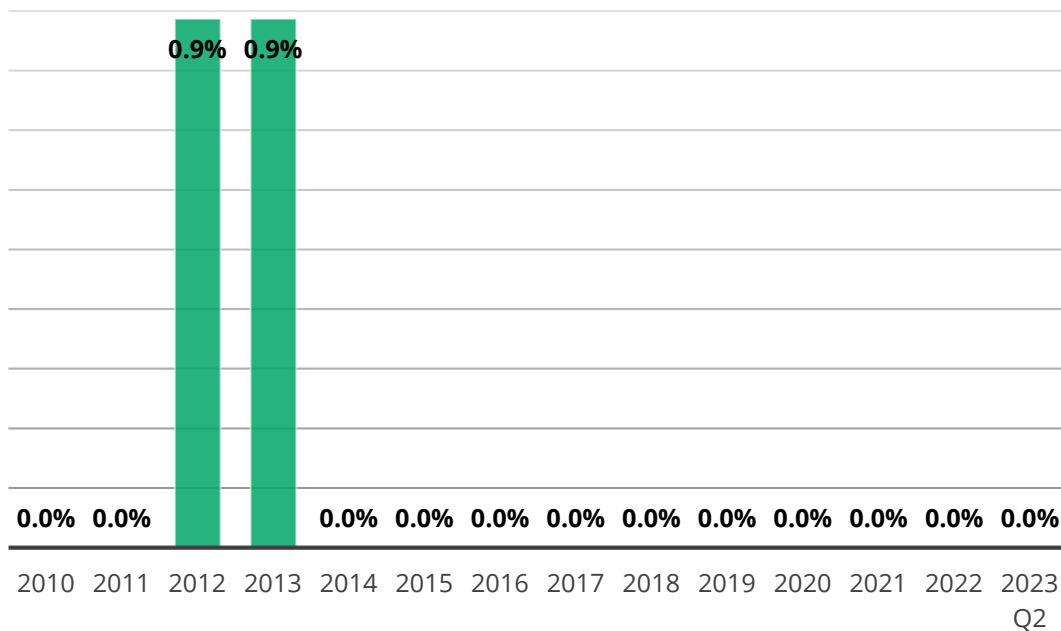
Since 2014, the surveyed industrial properties in Lebanon remained fully occupied. The modest absorption of industrial space and absence of vacant space might stem from the abundance of single-tenant and owner-occupied buildings. The absence of vacant industrial space available for immediate occupancy is a barrier to attracting prospective businesses.

Ice Cream Factory (ICF) of Eldon has purchased an 86,000 square foot former industrial facility in Lebanon that will serve as the company's new manufacturing plant. Renovations are underway with a summer 2023 completion scheduled, creating 130 total jobs over the next five years.

The City of Lebanon owns the Lebanon Industrial Park at Route 66 and Wyota Drive. Existing businesses include Durham C-Line Division, Detroit Tool, and Dowco. Construction has started on three new businesses with 40 to 50 acres available for future development.

According to the Economic and Market Analysis, industrial job growth in Lebanon is projected to support the need for 346,000 to 663,000 square feet of industrial space from 2023 through 2040.

**FIGURE A.24**      **INDUSTRIAL VACANCY RATE TRENDS**  
(CITY OF LEBANON, MISSOURI)



## KEY TAKEAWAYS

Lebanon serves as Laclede County's principal shopping destination with key retail areas located in the downtown; along Jefferson Avenue north and south of the Interstate 44 exchange; and, along Jefferson Avenue from Interstate 44 south to Bland Road. The modest inventory of vacant retail space available for occupancy is a barrier for attracting prospective retail businesses. Lebanon's retail market is considered to be narrow and shallow, lacking retail needs in areas such as men's clothing, high-end grocery, sit-down restaurants, and entertainment options.

Office-related employment in the information, professional services, legal services, and finance, insurance, and real estate sectors account for 9.2 percent of Lebanon's total employment, compared to 21.4 percent of total employment in Missouri. The absence of vacant office space available for immediate occupancy serves as a barrier to accommodating the expansion of existing tenants or attracting new businesses to Lebanon.

Industrial employment in Lebanon comprises 31.3 percent of the total employment. This is higher than the statewide rate of 28.1 percent. The largest concentrations of industrial space are south of downtown along the railroad line and within the Interstate 44 corridor. The absence of vacant industrial space available for immediate occupancy is a barrier to attracting prospective businesses.



**[PAGE INTENTIONALLY LEFT BLANK]**

## APPENDIX B CONTENTS

OVERVIEW AND KEY  
FINDINGS

PROJECT MARKETING

CITY LEADERSHIP WORK  
SESSION #1

VISIONING WORKSHOP

PUBLIC SURVEY

BUSINESS AND DEVELOPMENT  
COMMUNITY MEETING

YOUTH COMMITTEE MEETING

CITYWIDE CHARRETTE

PUBLIC OPEN HOUSE

VIRTUAL PUBLIC OPEN HOUSE

FULL DOCUMENTATION OF  
RESPONSES

FINAL VIRUTAL CPSC AND TC  
MEETING

FINAL COMPREHENSIVE PLAN  
DRAFT REVIEW

CITY LEADERSHIP WORK  
SESSION #2



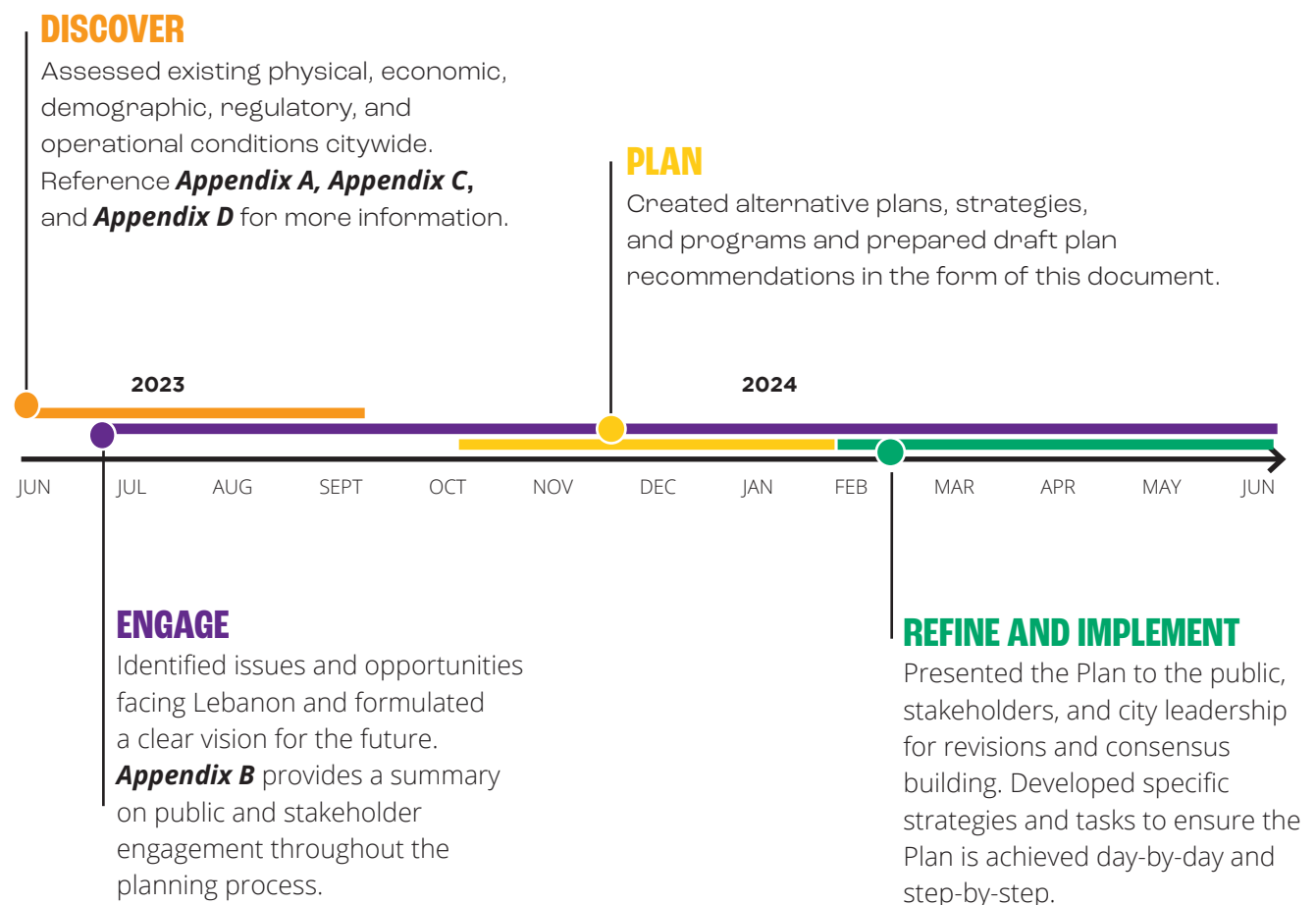
# PUBLIC ENGAGEMENT SUMMARY

A good plan is developed with the community, and not just for it. Through a series of online and in-person engagement opportunities, the planning team was able to collaborate with the community on the thoughts, ideas, and comments that became the recommendations put forth in this Plan. **Appendix B** summarizes both that process and its outcomes.

# OVERVIEW AND KEY FINDINGS

**Appendix B** summarizes the stakeholder and public engagement opportunities that were conducted to collect valuable input that helped guide this planning process. Stakeholder and public engagement is a critical component of any public planning process as it capitalizes on the knowledge and desires of those who know the community best.










The planning team and the city worked together to involve stakeholders from different facets of the community, including local business leaders, city staff members, and the local youth. These stakeholder groups held their respective meetings and were invited to several public events. These stakeholders were asked to act as a sounding board, providing their insight and information to assist the planning team in the direction and recommendation of the Plan.



# KEY PUBLIC PARTICIPATION FINDINGS

## Visioning Phase Key Findings

The visioning phase of the engagement process provides valuable input from stakeholders, city staff members, and the public. During this time the planning team is asking members of the community what they see as challenges for their city and to start dreaming about 'what could be'. These responses and aspirations tend to occur organically as the planning team leads members of city leadership and stakeholders through visioning exercises at multiple leadership and stakeholder work sessions and the Visioning Workshop. These responses also arise through meaningful discussions at various events and throughout the engagement process.





-  **Housing.** Stakeholders indicated that they would like to see additional housing options across all income levels, but particularly workforce housing.
-  **City Beautification.** Stakeholders indicated they would like to see streetscapes, entrances to the city, and the I-44 overpass be beautified. Others indicated that they would like to see blighted areas be transformed or improved.
-  **Culture and Character.** Participants indicated they would like to see more cultural activities like festivals, local community events, and small-town businesses. Other suggestions indicated a desire to see different, unique businesses within the community (e.g., wineries, theatres, sporting tournaments, festivals).
-  **Employment and Poverty.** Socioeconomic disparities and generational poverty are present within the community, causing issues with finding affordable housing and day care options. Part of this is due to the lack of employment opportunities. Stakeholders would like to see more options to the general workforce.
-  **Entertainment, Retail, and Dining.** Residents indicated they would like to see more local retail and entertainment options, for adults and families alike (e.g., bookstores, arcades, Target, Costco, and Sam's). For dining options, some comments called for more sit-down options.
-  **Infrastructure.** Community members expressed interest in seeing public and private infrastructure improvements, particularly cellphone network improvements.
-  **Community Care.** Multiple comments indicated that there should be more awareness around drug abuse, mental health struggles, and general healthcare problems. Multiple comments also called for affordable daycare options.
-  **Indoor Sports Complex.** A consistent, standout comment among stakeholders called for an indoor sports complex.
-  **Medical Care.** Multiple stakeholders, including a healthcare specific stakeholder group, indicated that there were concerns with retaining medical professionals in the area. Other feedback included the high cost of medical school, attracting new healthcare professionals, and the availability of medical training programs to younger Lebanon residents.

These themes gathered throughout the visioning phase will help the planning team create more pointed questions as engagement continues during the planning process.





## Planning Phase Key Findings

While visioning looks at the big picture, the planning phase begins to narrow the focus on specific areas to be addressed in the Plan. During this phase of the engagement process, more specific questions were asked about everyday life within Lebanon to explore the issues and opportunities that exist in the following topic areas: Land Use and Development, Mobility and Transportation, Community Placemaking and Aesthetics, Green Spaces and Community Health, Economic Development and City Culture. The planning phase included the Citywide Charrette, In-Person Public Open House, and Virtual Public Open House.




### LAND USE AND DEVELOPMENT

-  **Growth and Development.** Focus on developing and growing North Highway 5. Other stakeholders indicated that an alternative economic corridor along Mills Creek Road, connecting to Commercial Street, would be appropriate add creating an alternate traffic flow from the northern part of the city.
-  **New Land Uses.** New commercial uses were deemed to be appropriate along Mill Creek Road and just off each of the three main exits from I-44. Some stakeholder indicated that additional multi-family land uses would be appropriate east of Beck Street and south of Highway 32, and just north of Commercial Street.
-  **Infill and Redevelopment.** Infill development was largely indicated as being needed primarily along Commercial Street and along south Route 66. Newer development was prioritized along E. Elm and Mill Creek Road and north of the railway.
-  **Housing.** Some stakeholders indicated that they thought additional housing should include single-family residential, particularly average income housing; multi-family housing, some specific comments called for 4-plex and 8-plex housing options; and senior housing.





### ECONOMIC DEVELOPMENT AND CITY CULTURE

-  **Growth and Development.** Stakeholders and members of the public indicated that they felt that growth was appropriate from Elm through Jefferson, particularly along the northeast corner. Other comments suggested growth and development should occur along Mill Creek Street and in southern parts of the city, just south of Utah Street. Some comments indicated that it might also be appropriate for TIF or CID for East Elm Street.
-  **Business Sectors.** Multiple comments indicated that certain economic sectors were missing from the city's employment base. Stakeholders indicated these areas included the medical profession (e.g., mental health services, dentists, medical specialists), transportation, technology, and hospitality (e.g., hotels). In addition to employment, stakeholders would like to see certain retail opportunities develop within the city, like retail craft stores, hobby lobby, shoes stores, community theater, and Target.
-  **Heart of Town.** Residents were divided as to what was truly considered the heart of the city. While some indicated it might be the downtown along Commercial Street, others indicated it was Kenneth E Cowan Civic Center. Still others indicated it might be one of the city's parks – Boswell City Park, Maplecrest Park, Harke Park, and Atchley Park were all mentioned.
-  **City Culture.** Stakeholders indicated that they would like to see a sports complex for youth sports, community theater, more performing arts, geocache or Pokémon events, and local radio stations.




## COMMUNITY PLACEMAKING AND AESTHETICS

-  **Aesthetic Improvements.** Suggestions for city beautification efforts include adding entryway monumentation or welcome signs and wayfinding signage. Other aesthetic improvements include the beautification of the I-44 overpasses and bridges, adding historical markers to areas of historic significance, installing public art at gateway points, and having additional landscaping requirements.
-  **Cultural Impact.** Residents indicated they would like to see the library enhanced, a possible museum added to the public library, a concert series included as part of the city's calendar of events. Other suggestions included enhancing existing city events or adding additional cultural experiences that the local community can take part in.
-  **Ideas for Downtown.** Build on the history of the railroad and highlight other key historic events in the city. Other suggestions include reducing the number of vacant buildings present within the downtown and restoring the Allen Building.

## GREEN SPACES AND COMMUNITY HEALTH

-  **Preservation.** Stakeholders indicated they would like to see the current parks throughout the city be preserved, as well as the Route 66 Bike Trail.
-  **Environmental Sustainability.** Several public comments called for expanded recycling services throughout the city. Other comments encouraged a citywide food compost service, educational opportunities for residents, and local renewable energy projects.
-  **Healthy Living.** Comments for healthy living opportunities included adding more walking trails, bike lanes, and creating public exercise classes in the park. Similar to comments received during the visioning phase, stakeholders felt that mental health care and drug abuse prevention were priorities for the city.
-  **Sense of Community.** Suggestions to improve the sense of community throughout the city include increasing the city's social media presence, creating a digital billboard for widespread local access and use, and building a community resource center(s).

## MOBILITY AND TRANSPORTATION

-  **Roadways and Automobiles.** Several comments called for improvements to certain intersections or areas that are considered to be dangerous (e.g., the four-way stop at 4th Street and Adams Street). Other stakeholder feedback indicated that some signage was confusing for drivers, creating these dangerous conditions (e.g., southbound intersection on Highway 5). Consistent conversations and stakeholder comments reinforced frustrations around traffic congestion.
-  **Pedestrian Infrastructure.** Suggestions from stakeholders indicated that they would like to see additional sidewalks throughout the city, particularly near the high school; along Jefferson between 7th and Highway 5; Fremont to Harke; Rolling Hills Road; Moran Road to 127; and Mountrose and Tower.
-  **Bike Lanes.** Stakeholders indicated that they would like to see additional on-street bike lanes or off-road bike trails, but more bike infrastructure in general around the city. This also includes adding routes to prominent parks, like Atchley Park, to the Civic Center and to Lebanon High School.

# PROJECT MARKETING

Multiple media outlets were utilized to ensure Lebanon stakeholders and residents were aware of the opportunities to be involved in the planning process. Such communication channels included a dedicated project website, a postcard mailer, a flier, the city's social media accounts, press releases, and email blasts.

## Project Website

A website ([lebanonmoplan2040.com](http://lebanonmoplan2040.com)) was created to provide a landing page for anyone interested in learning about the planning process. The website provided information on a variety of topics related to the Plan, including:

- A project overview, which details the purpose of the Plan and the goals of the planning process;
- A project timeline that shows the phases of the project;
- A listing of the different ways to engage in the planning process as a member of the public (e.g., public survey, in-person open house, virtual open house, etc.);
- Project downloads that summarize findings at engagement events and the Plan drafts; and
- An opportunity to ask questions or provide comments to the city.

The website was regularly updated throughout the planning process, providing one consistent location for project-related information.

## Project Kick-off Video

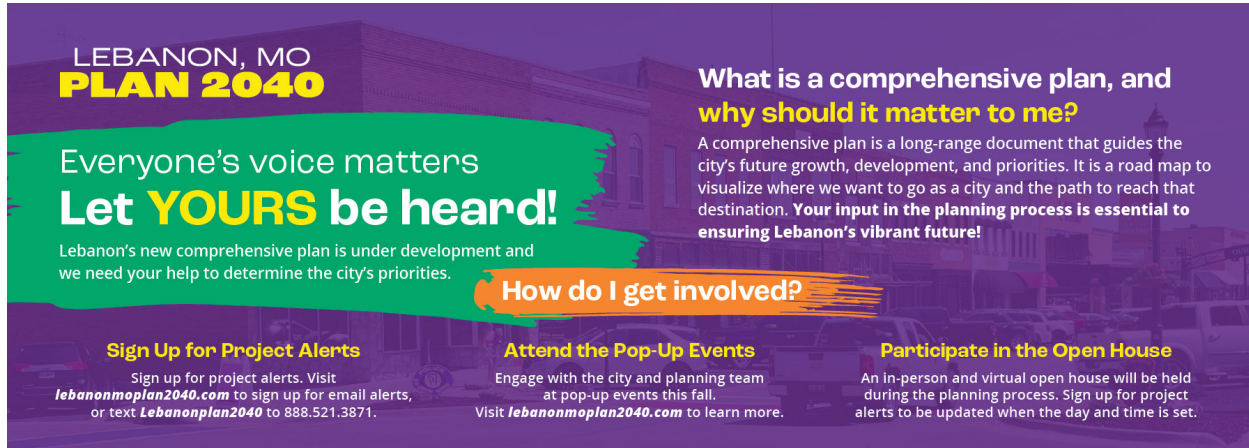
An interview-style, project kick-off video was developed in coordination with Mayor Jared Carr, to announce the kickoff of the comprehensive planning process, the purpose and need, why this process matters, and the importance of community involvement. This video was embedded on the project website and shared on the city's social media platforms and website.

## Social Media

The City of Lebanon social media platforms promoted project information and informed residents of upcoming engagement efforts.

## Postcard Mailer

A postcard mailer was mailed to all city households encouraging residents to take the community public survey, join the email list (to receive project updates), and participate in the public open house.



## Email Blasts

The project website provided the public with the option of joining the contact list to receive project communications.

Various e-blasts were sent to those who opted into email notifications about the project to provide information on engagement opportunities.

A unified brand was created for the Plan, including set colors, fonts, and logo. The brand standardized the visual identity of materials related to the planning process, so that outreach efforts could be easily attributed to the Plan.

## Press Releases

Four press releases were distributed and used to formally announce milestones in the planning process. Each press release included basic project information and directed readers to the project website. The four press releases focused on the following topics:

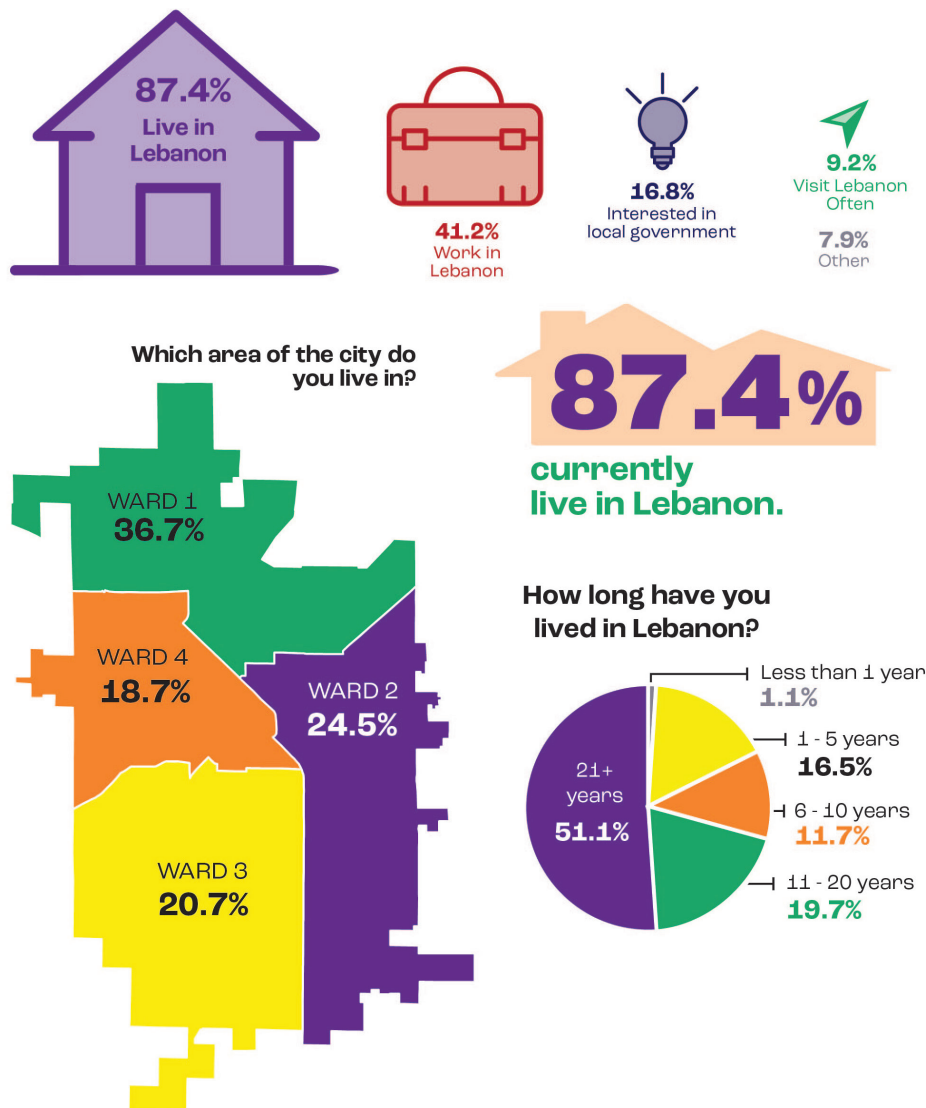
- Press Release 1: project kick-off
- Press Release 2: public survey
- Press Release 3: virtual open house
- Press Release 4: final plan adoption

# PUBLIC SURVEY

As part of the public participation process, a public survey was distributed to residents and stakeholders. This survey focused on residents' and stakeholders' preferences for Lebanon's future. The results were used to identify areas of focus for the planning process.

The survey was available from August 23, 2023, to September, 27, 2023, via the project website. The survey was completed by 238 respondents. The results of the survey are detailed briefly in **Figures B.1 through B.4 Public Survey Key Findings**. The complete survey, inclusive of all findings, is available on the following pages.

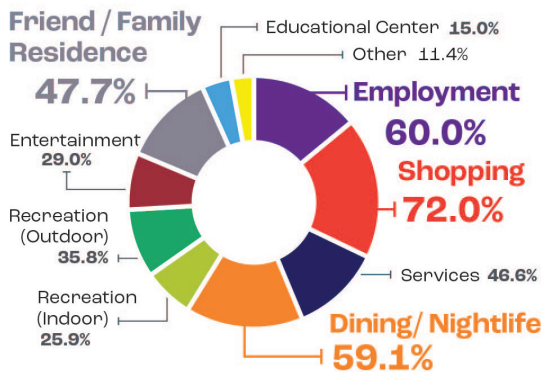
**FIGURE B.1 - PUBLIC SURVEY KEY FINDINGS**



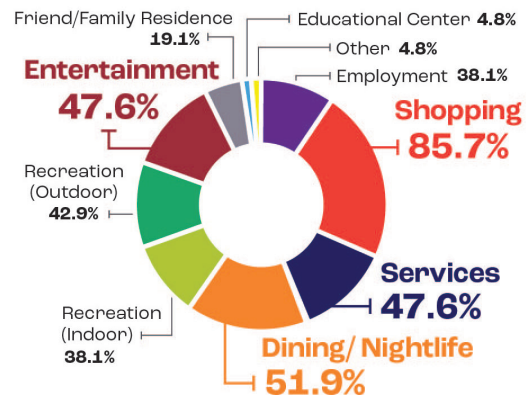
**FIGURE B.2 - PUBLIC SURVEY KEY FINDINGS**



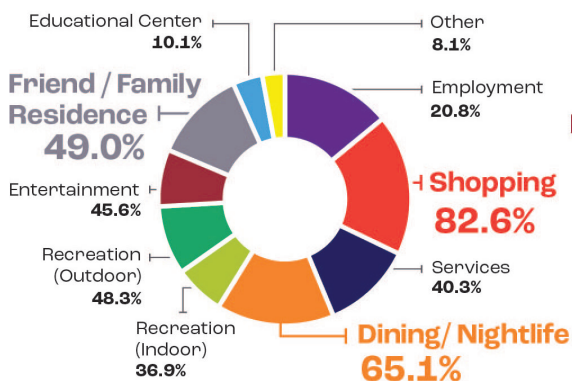
**Which type of destination are you most likely to visit within Lebanon?**



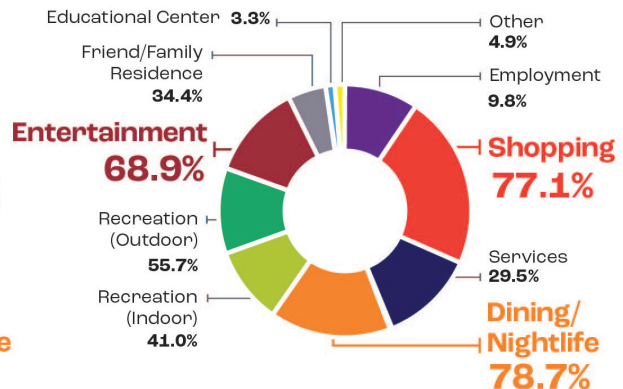
**Which types of destination are you most likely to visit within other communities?**



**Which type of destination are you most likely to visit within Lebanon?**



**Which types of destination are you most likely to visit within other communities?**



**FIGURE B.3 - PUBLIC SURVEY KEY FINDINGS**

## Lebanon's **TOP 5** OPPORTUNITIES / PRIORITIES

- 1 Creating an attractive businesses environment.
- 2 Attracting commercial and retail development.
- 3 Improving programming and resources for children and young adults.
- 4 Increasing public safety.
- 5 Improving programming and resources for seniors and older adults.

### Most likely to visit ...



**41.6%**  
Fine Dining  
Restaurants



**35.3%**  
Butchers/Craft or  
Artisan Grocers



**34.7%**  
Clothing and  
Accessories

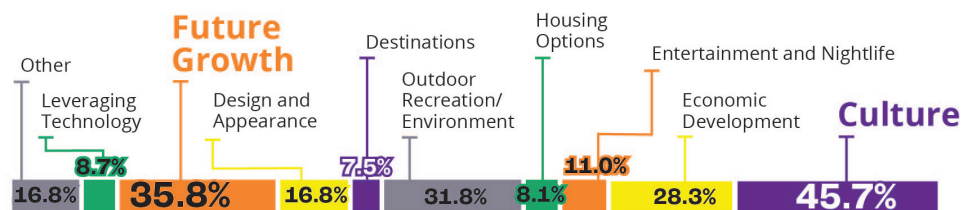


**33.0%**  
Live Entertainment

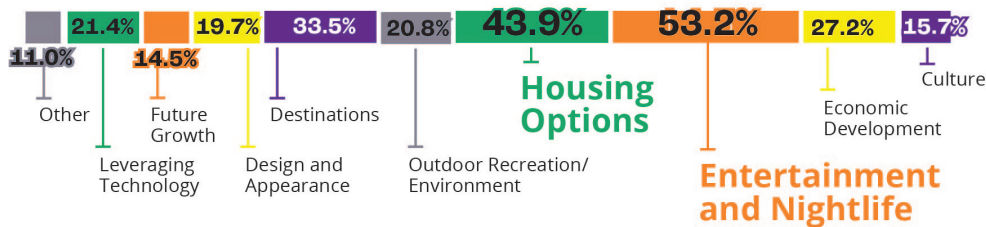


**29.5%**  
Casual/Fast  
Casual Dining

### What do you value most about Lebanon? What is the City of Lebanon currently doing well?

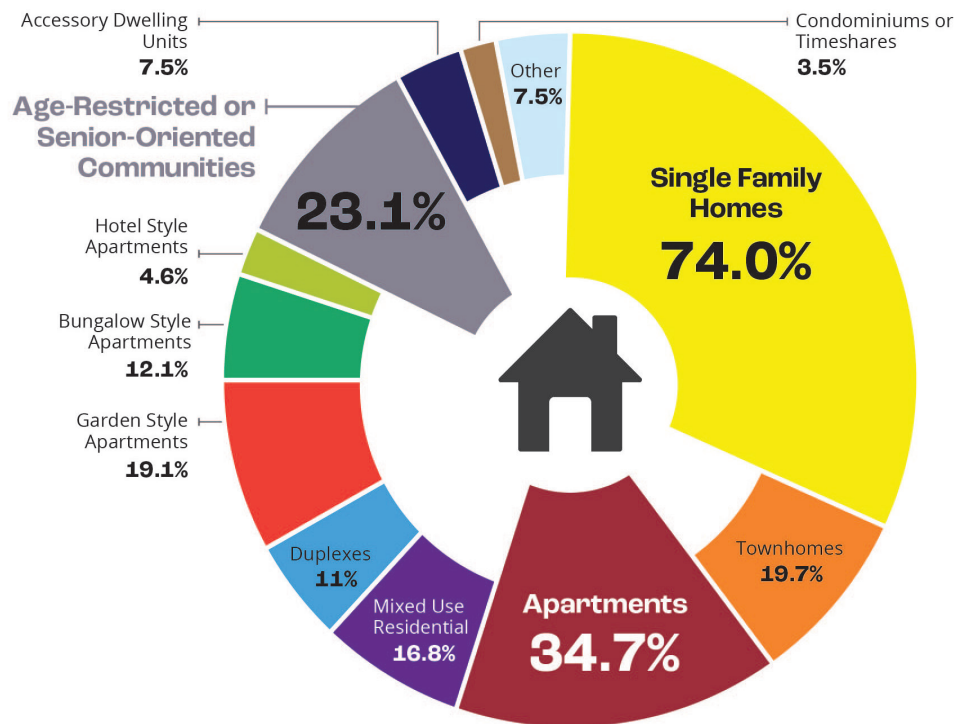


### What do you think could be improved in Lebanon? What is the City of Lebanon currently not doing well?

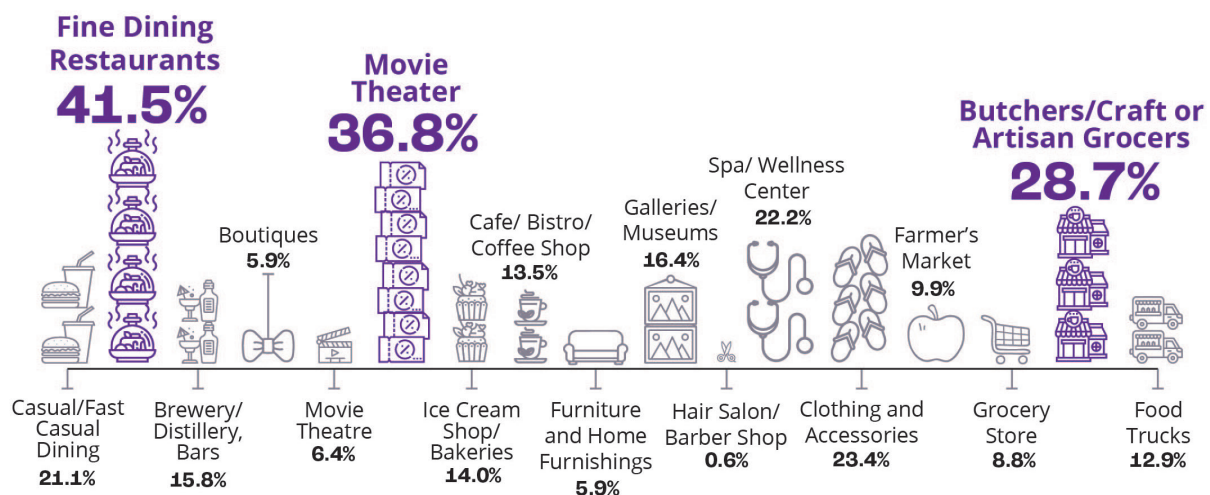


**FIGURE B.4 - PUBLIC SURVEY KEY FINDINGS**

**Which housing types are most needed and appropriate in Lebanon?**



**What types of retail and entertainment are needed in Downtown Lebanon?**



## CITY LEADERSHIP WORK SESSION #1

The first City Leadership Work Session took place on Thursday, September 7, 2023. The meeting was at 401 South Jefferson, Lebanon, MO 65536. The planning team provided an overview to city leadership about the comprehensive planning process and introduced the project website. The planning team also outlined the stakeholder engagement period, a preliminary existing conditions analysis that included existing land use, housing market trends, and demographic data. After the presentation, the planning team asked participants to identify their Needs, Wants, Desires, Barriers, Obstacles, and Annoyances for the City of Lebanon. The full list from the work session is located in the ***Full Documentation of Responses***.



**Above:** Stakeholders and city staff work together during the Vision Workshop to start identifying the communities desires for the future.

# VISIONING WORKSHOP

## Why is Visioning So Important?

Public engagement serves as a critical milestone in any planning process. Not only is the visioning and planning workshop (workshop) the first in-person opportunity for community members, stakeholders, and city staff members to meet and work together, it is the time when the collective tone for the process to come was set. The goal of the workshop is to guide the development of the Plan, ensuring it is reflective of overarching community goals.

The workshop is a time when participants are initially encouraged to ignore price tag and timing concerns. The process is meant to first uncover the needs, wants, and desires without being clouded by constraints. Visioning intentionally strips away what often holds people back from being truly honest about what they want to see. Once the needs, wants, and desires of the community have been fully explored, the constraints and roadblocks can be discussed. With the openness that comes from sharing with one another about what is desired, a more informed conversation can be had about impediments, obstacles, and dislikes.

During the workshop, the existing conditions of the city were examined within their respective areas: land use and development; transportation and connectivity; economic development and vibrancy; and parks, recreation, and natural features. Members of the community were encouraged to discuss and share what is and is not working within those areas.

In addition to providing a dedicated time and space for community members to participate actively in the planning process, this time is also important for the planning team, allowing them the opportunity to listen intently to what the community hopes to achieve from the project. Although the facilitated dialogue and exercises provide rich input, the act of simply listening to conversations being had between neighbors, acquaintances, city staff members, and city leadership with their constituents is invaluable to shaping the Plan.

## Visioning Workshop Overview

Before a plan's vision and ultimate plan can be crafted, it is important to meet with stakeholders to (1) ensure a clear understanding of their desires for the future of the city; (2) to gather local knowledge related to the issues and opportunities facing the city; and (3) to build consensus around a multifaceted solution. As the first step in this planning process, a visioning and planning workshop was held by the planning team.

The visioning workshop was held on Wednesday, September 27, 2023, at the Cowan Civic Center (500 E Elm Street, Lebanon, Missouri, 65536) from 5:30 p.m. to 8:00 p.m. The one-day workshop was attended by the planning team, stakeholder committee members, and technical committee members.

The stakeholder committee and made up of volunteers from the community. This includes residents, property owners, business owners, and other key stakeholder with a vest interest in the future of the city. The Technical Committee was made up of representative from the city administration that would, in part, be responsible for implementing portions of the Plan.

## WORD CLOUD

**FIGURE B.5 - WORD CLOUDS - WHAT ARE THREE THINGS THAT MAKE YOU PROUD OF LEBANON?**



## NEEDS, WANTS, DESIRES, BARRIERS, OBSTACLES AND ANNOYANCES

In the next activity, the stakeholders were asked to identify different aspects of their community based on six elements. They are defined as follows:

- Needs: We need to address this critical issue.
- Wants: If we had the choice, we would choose to have this...
- Desires: Wouldn't it be nice if..., but if we don't get it, that's okay.
- Barriers: Immovable objects or obstructions that we must go around. (We cannot simply eliminate them; we must define a path that minimizes or mitigates them.)
- Obstacles: Things that can be surmounted or changed (hopefully in our best interest); get in the way of what we want to accomplish (but not just a nuisance). (We can go over, through, or around them, but we must engage directly with them.)
- Annoyances: Things we just do not like; tend to be nuisances and personal; do not prevent you from achieving your goals.

To allow the stakeholders an opportunity to discuss amongst themselves, the planning team broke the participants into groups of 8-10. Each of these groups were given ample time to have discussion and record their responses, identifying their own needs, wants, and desires, barriers, obstacles, and annoyances for the city. All responses are listed below in **Full Documentation of Responses**.

After the allotted time, each group was tasked with prioritizing the top two from each category (e.g., two needs, two wants, etc.). After each group had their top two responses for each of the six categories, the groups chose a spokesperson to report back their priorities to all the attendees. **Table B.1** through **Table B.6** detail each groups' priorities, by category. This provided a chance for each group to synthesize and understand different perspectives within the larger stakeholder group. While some of the prioritized items were similar, some were different.

**TABLE B.1 - GROUP 1 PRIORITIES**

<b>Needs</b>	<ul style="list-style-type: none"> <li>• Additional housing across all incomes levels</li> <li>• Higher education - expansion of quality opportunities</li> </ul>
<b>Wants</b>	<ul style="list-style-type: none"> <li>• Beautification of entrances to Lebanon</li> <li>• Bike trails for safe travel - recreations</li> </ul>
<b>Desires</b>	<ul style="list-style-type: none"> <li>• Festivals - cultural activity</li> <li>• Sport Complex with indoor - outdoor activities</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• State &amp; federal - controlled transportation systems</li> <li>• Annexation</li> </ul>
<b>Obstacles</b>	<ul style="list-style-type: none"> <li>• Socioeconomic disparities – generational poverty</li> <li>• Redevelopment of unused land</li> </ul>
<b>Annoyances</b>	<ul style="list-style-type: none"> <li>• Unclear identity for/of Lebanon</li> <li>• Communication weakness – internet-cellular service</li> </ul>

**TABLE B.2 - GROUP 2 PRIORITIES**

<b>Needs</b>	<ul style="list-style-type: none"> <li>• Community Resources (Housing, Childcare, Mental Health, FosterCare)</li> <li>• Communication to Community (We have a lot; people don't know it)</li> </ul>
<b>Wants</b>	<ul style="list-style-type: none"> <li>• More community Involvement (Hart of Dixie &amp; Virgin River Style)</li> <li>• Community Events</li> </ul>
<b>Desires</b>	<ul style="list-style-type: none"> <li>• Transportation Connections (Public, walking, biking, ubers, sidewalks)</li> <li>• Adult (Excluding porn) &amp; Family entertainment (indoor sports, skating, Theater, arts)</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• Land Use</li> <li>• Funding</li> </ul>
<b>Obstacles</b>	<ul style="list-style-type: none"> <li>• Housing</li> <li>• Employment benefits</li> </ul>
<b>Annoyances</b>	<ul style="list-style-type: none"> <li>• Communication deficits (internet, cell, city events, calendar)</li> <li>• Blighted areas/Pride</li> </ul>

**TABLE B.3 - GROUP 3 PRIORITIES**

<b>Needs</b>	<ul style="list-style-type: none"> <li>• Community involvement</li> <li>• Housing</li> </ul>
<b>Wants</b>	<ul style="list-style-type: none"> <li>• Community involvement</li> <li>• Additional retail/restaurants</li> </ul>
<b>Desires</b>	<ul style="list-style-type: none"> <li>• Retail/restaurants</li> <li>• More cultural experiences</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• Funding</li> <li>• Railroad</li> </ul>
<b>Obstacles</b>	<ul style="list-style-type: none"> <li>• Housing (affordable)</li> <li>• Job opportunities (post college/professional)</li> </ul>
<b>Annoyances</b>	<ul style="list-style-type: none"> <li>• Blighted areas</li> <li>• Traffic</li> </ul>

**TABLE B.4 - GROUP 4 PRIORITIES**

<b>Needs</b>	<ul style="list-style-type: none"> <li>• Quality affordable daycare</li> <li>• Housing options</li> </ul>
<b>Wants</b>	<ul style="list-style-type: none"> <li>• Festivals, community &amp; business involvement</li> <li>• Indoor sports complex</li> </ul>
<b>Desires</b>	<ul style="list-style-type: none"> <li>• More cultural - winery, theatre, sports improvements, festivals, etc.</li> <li>• Competition in shopping options</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• Lack of diversity</li> <li>• Landowners with unreasonably priced property in prime locations</li> </ul>
<b>Obstacles</b>	<ul style="list-style-type: none"> <li>• Reputation/stigma/negativity</li> <li>• Drug abuse/homelessness/mental health crisis</li> </ul>
<b>Annoyances</b>	<ul style="list-style-type: none"> <li>• Lack of identity, “selling” “branding”, etc.</li> <li>• Better interest &amp; cell options (infrastructure)</li> </ul>

**TABLE B.5 - GROUP 5 PRIORITIES**

<b>Needs</b>	<ul style="list-style-type: none"> <li>• Housing</li> <li>• Expanded employment opportunities</li> </ul>
<b>Wants</b>	<ul style="list-style-type: none"> <li>• Economic growth + plan</li> <li>• Housing</li> </ul>
<b>Desires</b>	<ul style="list-style-type: none"> <li>• Retail options</li> <li>• Winery with a zoo</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• Railroad</li> <li>• Highways</li> </ul>
<b>Obstacles</b>	<ul style="list-style-type: none"> <li>• Drug abuse/mental health/healthcare</li> <li>• Reputation/stigma</li> </ul>
<b>Annoyances</b>	<ul style="list-style-type: none"> <li>• Lack of mental health resources</li> <li>• Lack of pride or ownership</li> </ul>

**TABLE B.6 - GROUP 6 PRIORITIES**

<b>Needs</b>	<ul style="list-style-type: none"> <li>• Quality affordable daycare - licensed</li> <li>• Education &amp; training to create an employable workforce</li> </ul>
<b>Wants</b>	<ul style="list-style-type: none"> <li>• City streetscape/I-44 overpass beautification</li> <li>• Community theatre/arts etc.</li> </ul>
<b>Desires</b>	<ul style="list-style-type: none"> <li>• Indoor sports complex</li> <li>• More retail options (grocery, clothing, etc.)</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• Railroad</li> <li>• Unfunded mandates that further generational poverty</li> </ul>
<b>Obstacles</b>	<ul style="list-style-type: none"> <li>• Mental health crisis/drug abuse</li> <li>• Reputation/stigma of being a drug town</li> </ul>
<b>Annoyances</b>	<ul style="list-style-type: none"> <li>• Lack of County support/leadership &amp; cooperation with the city</li> <li>• Traffic flow/traffic light coordination</li> </ul>

## VIRTUAL HEALTHCARE AND EDUCATION STAKEHOLDER MEETING

The Virtual Healthcare and Education Stakeholder Meeting took place on Wednesday, December 20, 2023, and involved several members of the local healthcare and educational community. This meeting was to discuss issues that stood out after the Economic and Market Analysis was completed and to see what opportunities were available to help educate and recruit additional healthcare professionals to the community.

Some of the themes that were discussed during the meeting included the cost of medical school and training; retention of medical professionals in the area; and the availability of medical training to younger citizens.

## YOUTH COMMITTEE MEETING

The Youth Committee Meeting took place on Thursday, September 28, 2023, at Lebanon High School (777 Brice Street, Lebanon, Missouri 65536). The planning team met with a group of interested youth who had a vested interest in the project planning process. In the meeting, the 11 members of the group learned what a comprehensive plan is, the project timeline, and the planning process. They also learned about the importance of visioning and defining a city's needs, goals, and ideas for the future. The planning team led the group through a series of exercises. The first exercise asked everyone to identify three things that make them proud of Lebanon and three challenges that Lebanon faces in *Figures B.7 and B.8 Word Clouds*.



**FIGURE B.7 - WORD CLOUDS - WHAT ARE THREE THINGS THAT MAKE YOU PROUD OF LEBANON?**



**FIGURE B.8 - WORD CLOUDS - WHAT ARE THREE CHALLENGES WE FACE IN LEBANON?**



After this exercise, the students were broken to groups and asked to identify different elements that are present in Lebanon. These include the following:

- Attraction – What makes you leave Lebanon? Be specific.
- Wants – “If we had the choice, I would choose to have this in Lebanon”. Think about specific businesses, types of places, etc.)
- Retention – What would bring you back to live (or help you remain) in Lebanon after you graduate?
- Uniqueness – What are unique amenities that could be added to Lebanon to distinguish itself in the region? Think BIG!

After working through their initial ideas, each team was then asked to prioritize their top two selections for each element and place them together on a separate sheet. These prioritizations are included below. For a full list of all responses and ideas for this exercise, please see the **Full Documentation of Responses**.

**TABLE B.7 - YOUTH PRIORITIES**

<b>Attraction</b>	<ul style="list-style-type: none"><li>• Food choices Lebanon doesn't have</li><li>• Strip mall</li><li>• Shopping &amp; food</li><li>• Variety of food</li></ul>
<b>Wants</b>	<ul style="list-style-type: none"><li>• Arcade &amp; book store</li><li>• Festivals and music (hometown feel)</li><li>• Sam's/Costco</li><li>• Target</li></ul>
<b>Retention</b>	<ul style="list-style-type: none"><li>• Job opportunity + mexican food</li><li>• Family/community</li><li>• Better jobs</li></ul>
<b>Uniqueness</b>	<ul style="list-style-type: none"><li>• Drive-in movie and expand downtown</li><li>• Sports center + community days</li><li>• Backyard hangout with gym study, chill, food options</li><li>• Sports complex (volleyball, golf, swim, batting cage, indoor)</li></ul>

# CITYWIDE CHARRETTE

The Citywide Charrette took place at the Cowan Civic Center, located at 500 E. Elm Street, Lebanon, Missouri, 65536, from Wednesday, October 18 to Thursday, October 19, 2023.

## DAY ONE

The planning team met with members of the stakeholder and technical committees to go over the charrette process and schedule for the subsequent charrette sessions that would take place over the two-day period. The planning team also provided participants with an overview of the existing conditions and economic and market analyses as well as the preliminary results of the public survey. After the presentation, the planning team then split the participants into five groups and asked them to work their way through five different topic stations. Each group was given approximately 15-20 minutes at each station to provide their comments to different questions created by the planning team. The different topic stations included the following:

### Land Use and Development

- Where is growth (generally speaking) appropriate? Use the green dots to indicate where you think growth is appropriate and the red dots to indicate where you think growth is not appropriate.
- Following the legend, indicate on the map where new land uses are appropriate. Add as many dots as you'd like.
- Legend
  - Red – commercial
  - Blue – public/government
  - Purple – industrial/light manufacturing
  - Yellow – single family residential
  - Orange – multi-family residential
  - Pink – mixed use
  - Dark green – parks and recreation/open space
- What areas should be focused on for redevelopment and infill? What types of development would be acceptable? Use the red dots to show us where and your sticky notes to tell us why.
- What areas should be targeted for development? Use the green dots to show us where and your sticky notes to tell us why.
- Are there existing land uses that are misplaced? Use the purple dots to show us where and your sticky notes to tell us why.
- Should new housing be developed? If so, what kinds?

## Mobility and Transportation

- Where do you notice transportation safety issues within the city (i.e., traffic, speed, etc.)? Show us where by placing a yellow dot on the map and use your sticky notes to describe the issue.
- Where is it difficult to walk in Lebanon? What are your missing connections? Use the green dots to show us where and your sticky notes to tell us why.
- Where would you like to ride your bike in Lebanon? What type of infrastructure would you like to have available for biking? (i.e., off-road trails, road shoulders, painted bike lanes, etc.). *Show us where by placing a yellow dot on the map and use your sticky notes if desired!*
- What would make walking or biking around the city more enjoyable?
- What do you think of the local on-demand transit option with OATS, a non-profit organization that provides public transportation services to 87 counties within Missouri.

## Community Placemaking and Aesthetics

- What aesthetic and/or cultural aspects does Lebanon have that should be preserved or enhanced?
- What additional aesthetic enhancements would you like to see in Lebanon that do not currently exist?
- What sort of revitalization efforts should be focused on downtown Lebanon? Be specific.
- Describe the desired aesthetic and built form that you'd like to see in Lebanon.
- In what areas should the city focus on code enforcement and/or maintenance concerns?
- What areas of the city most need aesthetic improvements? Use your blue dots to show us where and your sticky notes to tell us why. What areas of the city act as "gateways" or entry point to the city? Use your purple dots to show us where.

## Green Spaces and Community Health

- Where should green/open space be preserved within the city? Use your green dots to show us where and your sticky notes to tell us why.
- How should your environmental resources (such as parks, conservation areas, streamways, etc.) be protected? What measures should be put in place in terms of policy?
- What should the city do to encourage environmentally sustainable development practices?
- What does healthy living or a healthy lifestyle look like to you in Lebanon? What additional amenities and/or programs should be incorporated to improve healthy lifestyles?
- How can the city support community health? What programs are most important to you or your community to focus on? (e.g., mental health, opioid/drug crisis, obesity, etc.)
- What can the city do to build a stronger sense of community?

## Economic Development and City Culture

- What parts of the city are not currently being used in the best possible way when you consider the local economy? Use the pink dots to show us where and sticky notes to tell us why and how that might be improved?
- What's missing from the city's current business and employment environment that needs to be added? Be specific.
- What's missing from the city's retail/entertainment environment that needs to be added? Be specific.
- What parts of Lebanon do you consider to be "the heart" or central gathering area? Use the blue dots to show us where and your sticky notes to tell us why. If you do not think there is one, why is that so? Where should one be?
- What attractions, programs, and events would you like to see in Lebanon that do not currently exist (i.e., festivals, annual sports or cultural events)?

After working through each station, the groups were asked to prioritize their top elements/ideas from each category and rewrite them on new sticky notes. This exercise allowed for participants to work together and think through their priorities for the city's future. **Table B.8 through Table B.12** detail priorities by category. All comments received from the charrette are listed in the **Full Documentation Responses**.

After the first day's session wrapped up, the planning team worked together in a closed studio, compiling notes from what they had heard. This closed studio time also provided members of the planning team to begin writing and drawing their concepts for the following day's activities.

## DAY TWO

The second day of the charrette began with open studio time. Members of the stakeholder and technical committees were able to come in and view what the planning team were busy working on. Later that day, these stakeholders were invited to a concept review period. During this period, the planning team presented their concepts to both committees. Stakeholders and city staff members were then able to leave detailed comments on the concepts. These comments are list in the **Full Documentation of Responses**.

**TABLE B.8 - LAND USE AND DEVELOPMENT**

- Develop Allen Building
- Diversify retail and residential opportunities
- East Elm. Old Bell Rest. Area
- Downtown Apartments, Allen Building
- Single Family and mutli-family homes
- Land use – incentives for redevelopment for the landowners
- East Elm St/ Millcreek, Additional 4plex or 8 plex dwellings for lower income.
- Land use and development, north 5 gateway – capitalize on 102 traffic

**TABLE B.9 - MOBILITY AND TRANSPORTATION**

- Safety-better use of roundabouts
- Transportation, twin 4-way stop into roundabout. More street lights.
- Mobility and Transportation, E32 + Tower – stoplight, Rolling Hills Rd – sidewalks, 64 to city limits – sidewalks
- Roundabouts everywhere, sidewalks

**TABLE B.10 - COMMUNITY, PLACEMAKING, AESTHETICS**

- Aesthetic, welcome to Lebanon sign on I-44, Focused economic develop/ on Millcreek Rd.
- Consistent inviting theme, Preserve history
- Community placemaking and aesthetics, 1) recognize historical railroad, 2) I-44 overpass beautification
- Community, interstate gateway to Lebanon signs on each exit “Bennett Springs”, “Boat town USA”, “3rd exit?”, “Gateway to the Ozarks”
- Welcome signs I-44, Allen Building

**TABLE B.11 - GREEN SPACE AND COMMUNITY HEALTH**

- Pedestrian maneuverability, diversity
- Mental health crisis center, walking trails
- Mental health/drug abuse and early education, recycling
- 24/7 crisis center/mental health, advertise a link for events on digital billboard, recycling
- City sponsored recycling pick up start by Ward

**TABLE B.12 - ECONOMIC DEVELOPMENT AND CITY CULTURE**

- Underdeveloped property. Rhymes with master, west commercial, high tech jobs
- Continue to develop downtown business and areas with redevelopment incentives
- Need additional. Dentist or specialists.
- East Elm. St. needs TIF or other incentives for development.
- Sports complex, specialized healthcare
- National retail, Hybrid commerce/ residential areas

## PUBLIC OPEN HOUSE

At the end of the citywide charrette, a public open house was available to residents and members of the community. The public open house occurred on Thursday, October 19 from 5:30 to 7:30 p.m. at the Cowan Civic Center, located at 500 E. Elm Street, Lebanon, Missouri 65536. Similarly to the stakeholder and technical committees' meeting, the public had the opportunity to work through the different topics stations and provide their direct feedback.

The stations at the in-person open house included:

- **Welcome and Sign In.** Thank you for taking the time to plan for Lebanon's Future! Please sign in.
- **About the Project.** Learn more about the planning process and the project!
- **Our Questions for You: Land Use and Development.**
- **Our Questions for You: Mobility and Transportation.**
- **Our Questions for You: Placemaking, Culture, and Aesthetics.**
- **Our Questions for You: Community Health and Public Safety.**
- **Our Questions for You: Economic Development and Vibrancy.**
- **Initial Ideas.** The following posters present initial ideas that could be considered for Lebanon's Comprehensive Plan. Please review the following ideas and leave your comments via sticky notes.
- **Thank you! Did We Missing Anything?** Let us know if the planning team missed anything that you feel should be addressed. Share your comments via sticky note.

Members of the public were also able to view the initial concepts the planning team had presented earlier that day during the concept review period. These comments are included with the rest of the comments received during the citywide charrette in the ***Full Documentation of Responses***.

## VIRTUAL PUBLIC OPEN HOUSE

For those that were unable to make the in-person public open house, a virtual public open house was available via the project website from Thursday, October 26, 2023, to Friday, November 11, 2023. Similarly, to the in-person public open house, the virtual open house option was divided into different stations, allowing participants to navigate between the stations by scrolling through the PDFs. As they followed the questions through the virtual open house, participants were able to pin their comments to the pages of the virtual stations. The virtual open house was viewed 640 times and received a total of 69 comments. These comments were gathered and incorporated into ***Full Documentation of Responses***.

## POP-UP EVENT #1

Lebanon hosted a pop-up event on Wednesday September 27th at the Farmers Market from 11:00 am to 3:00 pm. City staff were available to answer questions and have conversations about the Comprehensive Plan. Participants were asked to view the prepared boards and leave their comments via sticky dots. The boards provided citizens the chance to express their opinions on priority actions for community development, transportation, city communication, the future of Lebanon, opportunities for Lebanon, and regional effects. The documentation of the participants' responses can be found in the **Full Documentation of Responses** section.



## FINAL STAKEHOLDER AND TECHNICAL COMMITTEE MEETING

The final Comprehensive Plan Stakeholder Committee (CPSC) and Technical Committee (TC) meeting was held virtually on Thursday, March 14, 2024 from 6:30 p.m. to 8:00 p.m. Stakeholders were presented with a draft version of the Plan's vision statement and core values as well as three framework plans which included the Future Land Use, Connectivity, and Aesthetics and Character. Stakeholders were able to voice their thoughts and concerns in breakout groups and provided constructive feedback to the planning team by making virtual comments on an online public engagement tool.

## CITY LEADERSHIP WORK SESSION #1

### Needs, Wants, Desires, Barriers, Obstacles, Annoyances Exercise

#### Needs

- Housing
- Traffic route
- Education expansion
- Development space/multi-use office/shared
- Childcare affordability/quality
- Improve city & county relationships
- Medicare services (doctors, etc
- Bike trails/lanes
- Improve quality of housing
- Otc – trade education
- Reclassification of city
- Cooperation of city and county 911 call service and emergency department of city and county.
- More programs to address the drug issues
- More programs to help stop the generation cycle of crime, abuse, drug use, etc.

#### Wants

- Sidewalks on highway 5
- Ada upgrades on all sidewalks
- More rental housing (high density)
- More cleanups
- Senior housing (wait 1 year)
- Overpass over railroad? Desire?
- Growth at airport
- Spec building for industrial/commercial space
- Education facilities (expansion)
- Shelters (warming, fema)
- Reduce traffic congestion (esp. On jeff)
- Marshalls/tj maxx/home goods

- Concert venue/outdoor amphitheater
- Improved civic center
- More out of the economic development tea

#### Desires

- Mid-to-upper range dining options
- Hyvee
- Miles of walking & bike trails
- Commercial airport
- Visitor side seating @ lhs football field
- Recreational options
- Retail
- Bennett spring
- New motto “boat town usa”
- Christmas lights on every home
- Overpass over i-44 (not an exit necessary)
- More dining options
- More outdoor kid friendly activities
- Waterpark
- Location of “parks” in whereneeded for kids “closest to them”
- Lighted crosswalks
- Amphitheater (large outside coluseam)
- Museum historical lebanon/laclede county

#### Barriers

- Modot/railroad
- Nimby
- Attitude
- Population
- Income disparity
- State/county/usa

# FULL DOCUMENTATION OF RESPONSES

- Land (lack of...) “replacement” of when new build
- Utility expansion as expanded
- Length of time to adhere to enforcement of code
- Sale tax revenue w/a lower income median
- Expansion of services provided to emergency services
- City limits – boundary lines

## Obstacles

- \*Lack of county cooperation\*
- Close proximity to lake & springfield = double edge
- Traffic congestion / relationships w/modot
- Broadband internet
- Beautification could run down buildings in prime retail space
- Land locked airport
- Expansion
- Access for p.W to p.N
- Freemont & expansion of airport
- Disaster plans
- Hospitals/clinics
- Repeating cycle of poverty
- Inflation
- Cellular data upgrades
- Recruitment of police/fire/code admin
- Bypass hwy 5

## Annoyances

- Hwy 5, Lynn st. 7th street intersection
- Cowen, 32 intersection
- Sirens (nighttime?)
- “School” traffic

- Easet facing bleacher @ jacket stadium
- Lack of self-respect and community respect
- Lack of traffic law obeying
- Lack of available lots/building space
- Lack of mobile home inspections
- Memories
- Cell phone signal
- Internet service
- Traffic along jefferson
- Adequate shopping!!!
- Quality food & goods
- Fremont/tower/rolling hills rd safety/stripping

## VISIONING WORKSHOP

### Needs, Wants, Desires, Barriers, Obstacles, Annoyances Exercise

#### Needs

- Homeless solutions
- Acute mental health resources
- Sidewalks (walmart area) + sidewalks everywhere
- Public transportation\*
- Chick-filet-a
- Housing \*type of? Diverse\* tiny homes, elderly subdivision
- Foster placements
- Expanding employment opps\*
- Community involv. -Volunteers\*
- Substance abuse recovery support
- Additional public safety personnel
- Updated school facilities
- More hotel options
- Airport expansions
- Robust higher education -skilled -2 yr.
- More diverse industries
- Something entertainment for younger adults\* (work force)
- Exposure
- Pay scale
- Retention (employees)
- Land/expansion
- Education
- Quality affordable daycare
- Semi-truck flow/hwy 5 loop
- Clothing retail options
- Continued growth of a robust downtown
- Football playoff win!
- More neighborhood small parks
- Street beautification – trees/shrubs
- Higher emergency responder
- Dentists/specialists
- More trade school training
- More variety of sit-down restaurants
- I-44 overpass beautification\*
- Curbside recycling
- Trash service options
- Rebuild gasconade hotel
- “Entrance” to city 44,32,64,5
- Golf course/airport
- Expansion current airport
- Affordable youth entertainment
- Sporting complex (indoor)
- Cross country/bike trails
- Additional retail (more variety)
- Community-based event (apple festival,etc) hillbilly days
- Youth travel sports – host tourney’s
- Public transportation (uber, etc.)
- Need a weekend christmas festival incorporating the parade
- Theater-live entertainment -community theater
- Revitalize downtown buildings (grants) -apartments
- Community be involved
- Connection/theme
- Zoo
- Economic growth and plan

#### Wants

- Improved sidewalks

## VISIONING WORKSHOP

### Desires

- \*More cultural experiences\*\*community theater, art walk, concerts)
- Winery \*\*\* + adult date day
- Trolley for tourist attractions
- Retails options (\*grocery stores, target, etc.)
- Expand higher education opportunities
- Greenspace – pocket park
- Zoo
- Skating rinks ice
- Culver's
- Indoor sports complex
- Parking! @ Outdoor activities & schools
- Uber – scooters!
- Indoor tennis courts
- Ampitheater
- Buc-ees
- Sam's club/costco
- Chick-fil-a we need it
- More for seniors (expansion senior center
- Recycling
- Bike/walking trails (coming)
- Festivals
- Science center/museum
- Arcade
- Casino
- Used car lot
- Expwy
- Turf for ball fields
- Soccer complex
- Aquatic center

- 2nd skate park
- More 24 hour option (food, bev. Activity, pharmacy)

### Barriers

- Railroad
- Hwy's/i-44/64/5/32
- Airport
- Flood plain's/watersheds/sinkholes
- No overpasses within city over railroad – could create problems w/emerg. Resp.
- Annexation resistance
- Sewer capacity & pump stations
- Trunk lines etc.
- Regulations – envir./Unfunded mandates
- Generational poverty
- Above-ground utilities
- Land owners with unreasonable priced property in prime
- Lack of diversity
- Funding
- Public communication
- Land
- More land in city

### Obstacles

- Safe pedestrian biking
- Drug abuse \*mental health crisis
- Housing (affordable-diversity-revitalizing)\*
- Synergy/partnership with flw (draw influence) – push to east
- Diversity of marketplace (rental, comm. Dev.)\* - Push to east
- Positive youth development/opportunities

## VISIONING WORKSHOP

- Cyclical poverty\*
- Next step/obstacles after military @ fww, etc.
- Railroad
- Median income
- Healthcare – options
- Reputation/stigma
- Lack of quality affordable daycare. Red tape/ regulation
- Shortage of qualified employees
- We need more diversified industry (too many boats)
- Limited post high school edu. Options
- Slumlords
- Competition over collaboration
- Lack of workforce due to drugs
- Cell coverage
- Improve city website/tourism site
- Local radio (during day)
- Not capitalizing on “crossroads” of ozarks
- Identity “selling” “branding” “entrepreneurship”\*
- History capturing (
- No food places like chick-fil-a
- Exposure
- Lack of mental health facilities
- Awareness
- Lack of criminal control in the county
- Lack of county zoning/property upkeep codes

### Annoyances

- Trash/solid waste-blighted areas\*
- Vagrants
- Traffic \*jefferson but no bypass\*
- Lack of amenities-entertainment-restaurants (w/meeting space)
- Recycling opportunities – need to be easier/ curbside
- Lack of pride of ownership
- Pot holes/storm water drainage
- Lack of county support
- Lack of church/civic organization collaboration
- Lack of social media presence with a community wide calendar
- Public forums become very negative very quickly
- Internet options – rural\*

## YOUTH COMMITTEE MEETING

### Group Priorities (Attraction, Wants, Retention, Uniqueness)

- Attraction - What makes you leave Lebanon? Be specific.
- Wants - "If we had the choice, I would choose to have this in Lebanon" Think about specific businesses, types of places, etc."
- Retention - What would bring you back to live (or help you remain) in Lebanon after you graduate?
- Uniqueness - Where are unique amenities that could be added to Lebanon to distinguish itself in the region? Think BIG!

### GROUP 1

#### Attraction

- To go shopping (mall, target)
- Variety of food (hibachi, chic-fila, andy's)
- Attractions/activities (big shots, incredible pizza)
- Panera
- H+M (not boutique)

#### Wants

- Target/Sams Club/Costco

#### Retention

- The community (everybody knows everybody)
- Family
- Lake regional (good health care, job)
- Job opportunities (family businesses, quantity)

#### Uniqueness

- Backyard vibe/hangout space (indoor activities ex. Pickleball)
- Sports complex (volleyball/basketball court/ pool for swim team, golf, simulator/range, batting cages)

### GROUP 2

#### Attraction

- Food (choices lebanon doesn't have)
- Big shots
- Mall (shopping)

#### Wants

- Homegrown
- Unity
- Chipotle
- Bakery
- Better (less) stoplights

#### Retention

- Family/community
- Job Opportunity
- Manageable cost of living
- Mexican food

#### Uniqueness

- Expand downtown
- Community activities
- Festivals
- Music
- Drive-in movie theater

### GROUP 3

#### Attraction

- Hibachi
- Chick-fil-a
- Mall/shopping

## YOUTH COMMITTEE MEETING

- Costco/Sam's Club
- Putt Putt Golf
- Amusement Park
- Lake

### **Wants**

- Chick-fil-a
- Culvers
- Panera
- Marshalls/ross
- Barnes & noble
- Orange leaf
- First watch
- Better pool
- Better nursing home

### **Retention**

- College
- Permanent farmers market
- Good quality schools
- Better jobs
- More activities
- More specialized hospital
- Non-profits

### **Uniqueness**

- More flowers
- Fresh produce restaurant
- Zoo
- Sports center
- Seafood
- Annual old people prom

## CITYWIDE CHARRETTE AND PUBLIC OPEN HOUSE

**Where is growth (generally speaking) appropriate? Use the green dots to indicate where you think growth is appropriate and the red dots to indicate where you think growth is not appropriate. LU#1**

- N5 – Gateway to LOZ (Lake of the Ozarks – road to capitalize
- Create alternate traffic flow and economic corridor

**Following the legend, indicate on the map where new land uses are appropriate. Add as many dots as you'd like. LU#2**

- Possible added restaurants, North 5
- New High School between 130 exist and YY – new bypass Rd.
- Allen Building GOI
- E. Elm get out of transitional neighborhood into prime commercial
- Dev. The Allen Building

**What areas should be focused on for redevelopment and infill? What types of development would be acceptable? Use the red dots to show us where and your sticky notes to tell us why LU#3**

- Develop in front of Lowes. It's ugly.
- Move the airport to the golf course. Have the school system buy airport land for growth.
- W. Elm – all old car lots.

**What areas should be targeted for development? Use the green dots to show us where and your sticky notes to tell us why. LU#4**

- E. Elm/Millcreek Prime underutilized commercial at #1331-44 1st exit from St. Louis.
- Spread over all so there is more businesses in various areas, for traffic, for growth

**Are there existing land uses that are misplaced? Use the purple dots to show us where and your sticky notes to tell us why. LU#5**

- Low income subsidized housing
- Senior housing closer to amenities
- ISL, Elm to Jefferson outer road
- Residential along Millcreek should be commercial.

**Should new housing be developed? If so, what kinds? LU#6**

- Single Family and Multifamily
- Downtown Apartments
- Allen Bldg needs to be developed
- Average income homes – single family
- Prevent big companies like Black Rock to from buying up individual homes.
- Additional 4-plex or 8-plex infill for lower income housing – larger complex create problems.

## CITYWIDE CHARRETTE AND PUBLIC OPEN HOUSE

**What parts of the city are not currently being used in the best possible way when you consider the local economy? Use the pink dots to show us where and sticky notes to tell us why and how that might be improved? ED#1**

- Elm – Jefferson NE corner, 55, Elm from Justic furniture to Ca – Mart
- Food Options on North 5.
- Across the road from pizza hut.
- East Elm St. needs TIF or other incentives for development CID.
- West Commercial
- Vacant lot across from Walgreens
- All property owned by plaster

**What's missing from the city's current business and employment environment that needs to be added? Be specific. ED#1**

- Mental health services
- Transportation
- Technology
- Higher education
- Health care
- Dentists
- Small hotels – not chains
- Entrepreneurial opportunity's
- High tech skill jobs/careers
- Tech maintenance

**What's missing from the city's retail/ entertainment environment that needs to be added? Be specific. ED#3**

- Retail craft store
- Rollerskating
- Hobby Lobby
- Target
- Variety restaurants
- White House, Black Market Retail Clothing
- Shoe Store
- Higher Quality Grocery Store
- Answer: ALDI
- Paved outdoor walking paths
- Community theater

**What parts of Lebanon do you consider to be "the heart" or central gathering area? Use the blue dots to show us where and your sticky notes to tell us why. If you do not think there is one, why is that so? Where should one be? ED#4**

- High school
- Youth sensory play environment – Ashley park, all season
- Downtown
- Our churches
- Civic center
- High school
- Bennett Springs
- Walmart
- New Wallace Park

## CITYWIDE CHARRETTE AND PUBLIC OPEN HOUSE

- Downtown
- Downtown and Civic Center

**What attractions, programs, and events would you like to see in Lebanon that do not currently exist (i.e., festivals, annual sports or cultural events)? ED#5**

- Community theatre
- Medical transport options for elderly (need)
- Scavenger hunt around city
- Sports complex for youth sports
- Yes!
- Public free or low-cost dances (swing, line, square, etc.)
- KJEL, Jacket Nation
- Hillbilly Days!
- Geocache Events
- Performing Arts
- Pokémon event or other digital event with Iphone
- Sports center/complex
- Local radio
- Bring back country lanes on 103.7
- Consider heartland antiques for the sports complex.

**Where should green/open space be preserved within the city? Use your green dots to show us where and your sticky notes to tell us why. GSCH#1**

- Really enjoy walking park next to Ozarks sporting goods/Harley
- Yes!

- Long walking trail, Morning Star – Dillworth through the watershed (Radio Tower Branch)
- Route 66 Bike Trail Loop
- Preserve parks, i.e., hotel history
- RFP

**How should your environmental resources (such as parks, conservation areas, streamways, etc.) be protected? What measures should be put in place in terms of policy? GSCH#2**

- Park master plan?
- Require public approval to change usage, it already does P&Z
- Where to start?

**What should the city do to encourage environmentally sustainable development practices? GSCH#3**

- Everything!
- Expanded recycling services – glass
- Pick-up recycling services
- recycling center
- agree!
- Education “How to”
- Drain covers w/ message about protecting waterways
- Encourage renewable energy projects
- Food compost garden

## CITYWIDE CHARRETTE AND PUBLIC OPEN HOUSE

### **What does healthy living or a healthy lifestyle look like to you in Lebanon? What additional amenities and/or programs should be incorporated to improve healthy lifestyles? GSCH#4**

- This seems to be a personal choice. Maybe exercise Equipment in parks?
- More walking trails
- Conservation wildlife walking cover
- Tai Chi + Yoga in the parks during good weather
- Start very young!
- Bike lanes trails/loops
- Distance markers at parks for walkers and runners + downtown

### **How can the city support community health? What programs are most important to you or your community to focus on? (e.g., mental health, opioid/drug crisis, obesity, etc.) GSCH#5**

- Mental health crisis center
- Exercise challenges across industries, manufacturing, etc.
- Mental Health + Drug crisis mentorship
- Rehab facility, support through their journey!
- Help publicly support health or exercise competitions – like what CrossFit 360 does to help get the word out.
- Space to facilitate on live mental health options at a low cost w/ confidentiality.
- Positive Youth Dev. 4-H/Scouts
- Free Health Fair (pay for more advanced tests)

- City internet spots so people can go for online mental counseling sessions internet for free.

### **What can the city do to build a stronger sense of community? GSCH#6**

- Public (or private) exercises classes in the park. Free or cost based good advertising
- More social media – reels – tiktok – Instagram
- Build opportunities for more diverse groups to be in and included
- Advertise a link for community events on digital billboard for widespread local access/ use.
- Digital gathering place
- Fourth + church
- Encourage diversity
- Support families with 1 or 2 community resource centers.

### **Where do you notice transportation safety issues within the city (i.e., traffic, speed, etc.)? Show us where by placing a yellow dot on the map and use your sticky notes to describe the issue. MT#1**

- 4-way stop on 4th + Adams was removed and created dangerous conditions.
- Add light at Mercy + remove 4-way stop, highly congested. Good place for roundabout.
- Stop light at Fremont \_ S. Jefferson make roundabout.
- Hwy 32 + Cowan Dr. Flashing Light \* Yes!!
- Jefferson – Elm to E32, too many cars during evening rush hour
- Jefferson near High school needs widened.

## CITYWIDE CHARRETTE AND PUBLIC OPEN HOUSE

- Stoplight at E32 and Tower Road
- Roundabout at S. Hwy 5 + Fremont.

### **Where is it difficult to walk in Lebanon?**

**What are your missing connections? Use the green dots to show us where and your sticky notes to tell us why. MT#2**

- No sidewalk at #127, I44 S. #133
- Railroad overpass
- Mountrose + Tower need sidewalks
- No sidewalks on Rolling Hills Rd
- Rolling Hills Road
- Morgan Rd to I27 – a lot of peds, no sidewalks
- Sidewalk on Fremont to Harke,
- Yes, all the way from Tower Road
- Jefferson between 7th and Highway S. split.

**Where would you like to ride your bike in Lebanon? What type of infrastructure would you like to have available for biking? (i.e., off-road trails, road shoulders, painted bike lanes, etc.). Show us where by placing a yellow dot on the map and use your sticky notes if desired! MT#3**

- West of Daytona will be an off road bike trail
- It would be great to see a safe, paved route that's around Lebanon
- A loop from Mercy to Civic Center to Bobuelli Park to middle school to Tower Rd. To Mercy
- Atchley to CCC to LHS, Big Loop
- Bike routes to all the parks – painted bike lanes with signs.

### **What would make walking or biking around the city more enjoyable? MT#4**

- Safe sidewalks (wider)
- Good lighting for walking at night
- A fitness route w/places to exercise
- Pavement + a buffer from traffic.
- Bike/walking trails that make a loop
- Sidewalks/parks
- Downtown marketed with mileage signs ie one end to other is "x" miles. Friendly signs to say 1 lap "1.5" miles

### **What aesthetic and/or cultural aspects does Lebanon have that should be preserved or enhanced? CPA#1**

- Magnetic Water History Rte 66
- Museum at the Public Library
- WT. Venson
- Add welcome signs
- Concert series
- Rt 66 beautification on East side
- Wayfinding signs
- Library

### **What additional aesthetic enhancements would you like to see in Lebanon that do not currently exist? CPA#2**

- Market "New Route 66" while maintaining history
- Dress bridges up according to the Lake and Bennett Springs

# FULL DOCUMENTATION OF RESPONSES

## CITYWIDE CHARRETTE AND PUBLIC OPEN HOUSE

- Bridge over interstate that says Lebanon – or welcome
- Public art at gateway points
- More weed maintenance
- Walking gardens with places to sit have conversation, respite.
- I-44 overpasses beautification
- Trees in downtown
- Historical markers/photos as new areas replace old ones
- History markers with Pokémon stops or other digital trends

**What sort of revitalization efforts should be focused on downtown Lebanon? Be specific.**

### CPA#3

- History of railroad. Historic Depot. History of Lebanon events.
- Allen Building restored
- Signage, historical façade
- Bridge/walkway another side of commercial is left out
- Allen building respectively restored is used for benefit of the mass. /living downtown
- Incentive to vacant buildings to not be vacant.

**Describe the desired aesthetic and built form that you'd like to see in Lebanon**

### CPA#4.

- We are a "boat" town.
- Lebanon yellow jackets
- Wow slogan "crossroads of the Ozarks"
- KJEL

- Welcoming supportive
- Growth!
- Route 66
- We are a tremendously compassionating community (LAF) <3
- Centrally located, pivotal access
- So much pride in the community apathy wouldn't exist
- Military friendly community
- Crossroads to the Ozarks

**In what areas should the city focus on code enforcement and/or maintenance concerns?**

### CPA#5

- Elm Street – southwest
- Continue on Downtown (Assessment on vacant properties)
- Elm St. "loop"
- The safety of all rental properties for the families that live int hem.
- Landlord regulation
- Consistency
- Follow through by all community members and municipality
- Landscaping requirements in comm + ind. Requirement
- Ways to help people with their lawns. Why aren't they mowing? Health?
- Follow through by all community members & municipality.

**What areas of the city most need aesthetic improvements? Use your blue dots to show us where and your sticky notes to tell us why. What areas of the city act as**

## CITYWIDE CHARRETTE AND PUBLIC OPEN HOUSE

### **“gateways” or entry point to the city? Use your purple dots to show us where. CPA#6**

- Old city compound. Attracts criminal activity
- Old bell restaurant area
- Mill creek, Rt. 66, East

### **Initial Concept Feedback - Vision Statement and Core Values**

- Please don't use "Gateway to the Ozarks". Terrible. Ozarks are a huge area. "Gateway Drugs" comes to mind.
- Lean into the Lebanon Tourism – funded billboard. The <3 of Route 66 or brainstorm future slogan
- Visit. Play. Stay.
- love this!
- Crossroads to the Ozarks?

### **Development/Redevelopment**

- Commercial x2
- Conservation
- New Industrial
- Neighborhood Commercial services
- Multifamily housing by high school, need for closer "walkability", along Brice and North Jefferson
- Between Dilworth Road and Brice Road – open space.

### **Recommended Future Land Use Categories**

- Why would you not use the existing zoning districts for the land use map.
- Missing Demographic Age Group, Senior Daily/weekly medical needs, new hospital, overnight family stays, traveling doctor/nurse,

outdoor/garden walkways/respice spiritual

- All main corridors should be commercial.

### **Mixed-Use Health and Wellness Distinct**

- Homeless camp
- Mixed use athletic studio, yoga, dance, martial arts, to help share location
- Aged medical need residents, daily need visits, hospice setting/resident, nurse, doctor traveling
- Group trees + shrubs to create arbor like features

### **Mixed-Use Example**

- No comments

### **Downtown Concepts**

- City lot
- Parking lot, chicken bark
- Lee Bldg – 3rd owner plans to redevelop

### **Connectivity Framework**

- Phase I of south loop schedule for construction 2024.
- Front \_ Hwy, intersection proposed for going on, currently with construction for 2024-2025.
- Add private schools?

### **Character and Aesthetics Framework**

- E.32, A secondary gateway more used than W. 32.
- Add South 5 Hwy.
- Signage on overpass? Marshfield Example

# FULL DOCUMENTATION OF RESPONSES

## VIRTUAL PUBLIC OPEN HOUSE

### WELCOME! AND INSTRUCTIONS

#### ISSUES AND OPPORTUNITIES - LAND USE & DEVELOPMENT

**What areas should be focused on for redevelopment and infill (e.g., the re-use of existing properties)? Place a comment where you think this is appropriate and explain what kind of land uses you'd like to see in your comment.**

- No comments

**What areas should be targeted for development? Place a comment where you think this is appropriate and explain what kind of land uses you'd like to see there in your comment.**

- Exactly what is a right of way pertaining to private property?
- Neal is spot on!
- Lebanon's TV Station: Where Lebanon residents could tune in to get Lebanon news, community affairs, sports and entertainment programming produced right here in Lebanon ( -instead of getting their news and info "second hand" from Springfield stations like KY3 and KOLR ). "Ozarks Down Channel" ( <https://locallegendfilms.jimdo.com/ozarks-down-channel/> ) might serve as it's news and entertainment programming template.
- Site of Shuttle Bus Service ( 5 shuttles ) taking Lebanon residents to and from the Camdenton/ Osage Beach area several times daily - for job commutes, Lake Regional medical visits, shopping, tourism and to entertainment venues ( -like concerts at the Ozarks Amphitheater, etc. ). There is a REAL NEED for this service by employers in the Camdenton/ Osage Beach area and by Lebanon residents who currently work ( or ) who would like to work at jobs in these towns. If shuttle bus trips could be made economical ( i.e: in the \$3.00-\$4.00 round-trip range for example ( or ) via a "season pass" card, etc. ) I think LOTS of Lebanon residents would utilize this shuttle service! This is a 30-36-mile commute and a real burden on Lebanon residents who work in Camdenton or Osage Beach area. Such a shuttle service would also make shopping, medical visits to Lake Regional, tourism and entertainment trips to these cities much, much easier. Employers and businesses in Camdenton/ Osage Beach ( -who need these employees, patients, shoppers and concert goers ) could split the operating costs of running this shuttle bus service ( -since they would directly benefit economically from these workers, shoppers, tourists, etc. ). I can't tell you HOW MANY Lebanon residents have mentioned how they wished such a ( reasonably priced! ) shuttle service existed. Currently, the ONLY alternative to this are "taxi" services that gouge the public with ridiculously expensive trip prices ( -that most folks can't afford! )
- Take advantage of the ice cream factory to use this area for tourism/recreation
- DEV: dedicated indoor / outdoor sports facility that could serve as a draw for the surrounding area
- If this is by the new school, the roundabout is clogged with waiting parents
- RE/IN: redevelop the disused rail tracks for recreation / play / art.
- "New" park on Harwood is gonna be amazing!
- RE/IN Expansion of current recreation area
- Something needs to be done about congested traffic, that is if this area is by Burger King 7 Brew. I can't read the small print

# FULL DOCUMENTATION OF RESPONSES

## VIRTUAL PUBLIC OPEN HOUSE

- DEV: Food and beverage options to spread traffic from Jefferson
- Entrance to park could be here.
- Would love to see a park in this neighborhood. This seems like a good spot.
- RE/IN: Current properties/ businesses should NOT be targeted nor the tactic of of “blighting” properties ( or ) using “eminent domain” be used to shift properties into City hands. I’m NOT in favor of that at all! I AM in favor of letting Lebanon’s residents decide the use of these abandoned or unused parcels. DEV: I would like to see a large parcel ( 250-300 acres ) of land OUTSIDE of Lebanon city limits proper be purchased and dedicated to building the “Lebanon New Technologies Campus” ( LNTC ) described here: <https://locallegendfilms.jimdo.com/lebanon-new-technologies-campus/> This campus would serve as both a training center/ school and industrial park of cutting-edge businesses specializing in a variety of future oriented high-tech, high-demand, high-paying technology jobs ( -which would keep Lebanon’s youth and working families gainfully employed right here in Lebanon for decades to come ). This would keep Lebanon’s economy vibrant for decades into the future and help us to AVOID the production cuts and lay-offs we will soon be experiencing at Lebanon’s boat companies as the economy, parts shortages and supply line problems result in production cuts and lay-offs at our factories. The LNTC would help to insulate and “recession-proof” Lebanon from these problems for decades to come.

### ISSUES AND OPPORTUNITIES - TRANSPORTATION AND MOBILITY

**Where do you notice transportation safety issues within the city (i.e., traffic, speed, ect.)?**  
**Show us where by placing a comment anywhere on the map below. Describe the issue in the comment textbox.**

- This intersection is confusing and a significant interruption on southbound traffic on 5. South bound on 5, large trucks often don’t abide by signs to stay on outside. Road markings fade and cars coming south on 5 often drift to the outside, not realizing that the outside is also a left turn. I have had multiple near accidents traveling south on 5 as cars drift over into my lane.
- When there are downtown events this intersection is busy and dangerous. Turning traffic often doesn’t pay attention to pedestrian lights. There should be railings along the sidewalk to keep pedestrians safe while walking from Commercial Street to the Farmers Market.
- Sidewalks are in disrepair or non-existent making it dangerous for pedestrian traffic.
- Traffic congestion. The turn lane is not properly used causing more congestion and hazards. A divided Main Street could help with flow of traffic like in larger cities.
- The gravel topping on this road was terrible for weeks after it was used. I hope the city never uses this again. The gravel dings on our car were really NOT needed! Use blacktop next time please!
- Traffic congestion
- Traffic congestion and underused outside lane
- Frequent traffic accidents

# FULL DOCUMENTATION OF RESPONSES

## VIRTUAL PUBLIC OPEN HOUSE

- As Jared, Joe and Chuck are aware, we were very disturbed by the dotted line drawn on this map by a citizen at the recent public meeting. The North South Arterial Alignment Feasibility Study performed for the city in 2018 by Crawford Murphy and Tilly identified three options for a Highway 5 bypass on the east side of Lebanon. Not one of the options was to route the bypass down Raef Road, a two-block neighborhood of well-kept single-family homes. The options were to connect with Route 5 via Route YY (already a state highway), or at Keller or Goldenrod. The disruption to existing homes would be minimal along any of those three options. Having lived in several communities over the past 50 years and seeing the consequences of bypasses, we're not fans of downtown bypasses and how negatively brick-and-mortar businesses are impacted. But if the city desires a bypass on the east side, it makes no sense to route it down a narrow street of well-kept, single-family homes when three better options, recommended by engineers, exist. Thank you.

### ISSUES AND OPPORTUNITIES - MOBILITY AND CONNECTIVITY

**Where is it difficult to walk in Lebanon? What are your missing connections? Show us by placing a comment anywhere on the map below and tell us why in the comment text**

- No sidewalks on North 5 at junction with Jefferson
- Walking between Commercial and Farmers Market does not feel safe with such close proximity to heavy traffic and large vehicles. A railing would help with pedestrian safety.
- Sidewalk on Fremont would be amazing!
- Sidewalks on Jefferson are incomplete, in disrepair, often are not wide enough and no gap between sidewalk and busy road.
- Sidewalks are needed pretty much all over the City but in the northern City area especially along 64/Jefferson in and around the streets that border 64/Jefferson on either side of the highschool.

**Where would you like to ride your bike in Lebanon? What type of infrastructure would you like to have available for biking (i.e., off-road trails, road shoulders, painted bike lanes, etc.)? Show us where by placing a comment anywhere on the map below and use the comment text to share your thoughts**

- Greenways that include a bike path would really be nice -especially if they preserve green areas in and around the city.

# FULL DOCUMENTATION OF RESPONSES

## VIRTUAL PUBLIC OPEN HOUSE

### ISSUES AND OPPORTUNITIES - COMMUNITY PLACEMAKING AND AESTHETICS

**What additional aesthetic enhancements would you like to see in Lebanon that do not currently exist? Tell us by placing a comment anywhere in this box**

- Reducing roadside signage to clean up the Jefferson strip.
- What sort of revitalization efforts should be focused in downtown Lebanon? Tell us by placing a comment anywhere in this box (please be specific).
- Continuation of improvements in downtown area, use of upstairs areas of buildings such as office space or nice apartments "Lofts". This would add income for property owners, and liven up the downtown areas. Men's Clothing and more boutiques would be great. It's great to see the improvements already made, restaurants, night life, retail options.
- Filling empty store fronts. A place for kids to play.

**What areas of the city most need aesthetic improvements? Show us by placing a comment anywhere on the map below. Tell us by describing your thoughts in the comment**

- No comments.

**What areas of the city act as "gateways" or entry points into the city? Show us by placing a comment anywhere on the map below. Indicate GATEWAY in the comment.**

- Gateway needed here
- Reducing roadside signage to clean up the Jefferson strip.
- Something to brighten up that new roadway / divider that is empty (and also not very visible). In Memphis they utilized extra-large colorful flower pots for some landscaping.
- Doing something with the unused railway lines to claim the history and make it not look unused / disused
- Area in need of aesthetic improvement. Looks rundown, disused (motel, empty lots, etc.)

# FULL DOCUMENTATION OF RESPONSES

## VIRTUAL PUBLIC OPEN HOUSE

### ISSUES AND OPPORTUNITIES - GREEN SPACE & COMMUNITY HEALTH

**What does healthy living or a healthy lifestyle look like to you in Lebanon? What additional amenities and/or programs should be incorporated to improve healthy lifestyles? Tell us by placing a comment anywhere in this box.**

- Quality green space, opportunities for social activities, possibly a fountain area with seating or adult "porch swing" type of seating for social get togethers. Healthy living to me is staying very active, outdoors, interacting with others or outdoor areas to just read or enjoy.
- I'd like to see more large park areas ( -similar to Atchley Park ) created that preserve what's left of Lebanon's vanishing green spaces. It seems these are quickly being gobbled up by subdivision developers ( -especially around Atchley park ). Preserve more of Lebanon's natural areas.
- More organized opportunities for adult sports and recreation.
- How can the city support community health? What programs are most important to you or your community to focus on (e.g., mental health, opioid/drug crisis, obesity, etc.)? Tell us by placing a comment anywhere in this box.
- Possibility of free or inexpensive "speakers" on interesting topics, classes in gardening and canning/freezing food, bread making, healthy eating?? The "recipe issue" and cooking show was fun back in the day, where people submitted recipes and there was a public event.
- The biggest thing that would improve Lebanon's community health would be to STOP defaulting to the Federal government ( -i.e: Anthony Fauci, the CDC, NIH, pharmaceutical companies, UN, etc. ) for our health matters. Their mRNA Covid-19 shots have already injured and killed thousands of Americans and their Covid lock-downs have devastated the economies of Cities across America. We should be turning to PROVEN remedies like Hydroxy Chloroquine, Ivermectin, Vitamin D3, Essential Oils and Rife Frequency technologies, etc. NOT to the experimental "gene therapies" which forever alter the human genome and which are now injuring and killing people nationwide!
- More access for mental health support. Parent assistance and education

**What can the city do to build a stronger sense of community? Tell us by placing a comment anywhere in this box.**

- Lebanon needs better communication methods - not sure what type. Perhaps an "online newspaper" or actual newspaper that is worth the subscription price. The current newspaper has declined over the years with use of virtual options. Activities take place and many don't hear of them until they are over. I think the town has made good improvements in the last couple of years, it just needs to continue.
- The "Lebanon New Technologies Campus" would help accomplish this by giving ALL of our citizens a bright economic future. Lay-offs and unemployment lead to despair, alcoholism and drug use and impact our crime rate. The LNTC would ALSO be a way to eliminate our homeless problem ( -by training these people to have marketable skills which would pull them out of poverty and hopelessness ) improving the cohesiveness of our community overall.

## VIRTUAL PUBLIC OPEN HOUSE

### ISSUES AND OPPORTUNITIES - ECONOMIC DEVELOPMENT & CITY CULTURE

**What is missing from the city's current business and employment environment that needs to be added? Tell us by placing a comment anywhere in this box.**

- To my knowledge, the Lebanon area does not currently have a data processing center, such as Mastercard, and no Pharmaceutical such as Express Scripts or Medical Billing and Coding companies in the area. I hear a lot of complaints about "factory work", not sure if those would be something successful in this area. Just options
- The "Lebanon New Technologies Campus" ( LNTC ): <https://locallegendfilms.jimdo.com/lebanon-new-technologies-campus/> and adjacent industrial park would both train and employ Lebanon's work force for the jobs of the future. High-paying, high-demand, high-tech jobs in more "recession-proof" industries ( i.e: like affordable ( -disaster-proof reinforced masonry ) prefab and modular housing, "zero-point" energy generation as well as in the high-tech Hollywood "spin-off" careers mentioned on the LNTC web page ). These high-paying, high-demand jobs would keep our young people and working families rooted here in Lebanon ( -as opposed to moving to bigger cities that have better employment prospects -which normally occurs in small Ozark towns ). The LNTC could be the "key" to keeping Lebanon's economy vibrant for decades into the future. Currently, boat manufacturing accounts for almost half of our town's economy. Let me ask you: How many people do you know who can currently afford a \$24K White River Marine bass boat or a \$104K Lowe Pontoon or \$64K G3 speed boat? Probably not many! Most people -even wealthy people -aren't purchasing such "luxury" items as much these days. They can't afford to with skyrocketing inflation under "Bidenomics"! This will result in production cuts and resulting lay-offs. The LNTC would add some much needed "diversification" ( -in less vulnerable industrial sectors ) to our town's economy making us less dependent upon a good economy to survive. As the Lntc web page shows -this proposed campus would provide a multiplicity of income streams and would therefore be less prone to the vagaries of our economy no matter who's in the White House!
- So I am very hesitant to share this. An "idea" to possibly consider - With the cost of organic nutritious vegetables, perhaps a small-scale hydroponic facility could be built in Lebanon. To begin try out one or two easy-to-grow heirloom veggies of maybe leafy greens and tomatoes year-round. Once perfected enlarge the facility to include more heirloom vegetables. Hire employees who could work in shifts. They could watch over the system, harvest and pack the veggies, and drive and deliver to restaurants and local stores like Price Cutter and HY-Vee. Some could be sold at the farmers market and as a way of giving back to the community give veggies to the elderly. As another way to make money, seeds could be collected and dried and then sold as heirloom varieties like the Seed Exchange does. There could also be classes on setting up small hydroponic systems at home along with problem-solving with these home systems. Hydroponics would solve an issue if the drought continues as it has been in certain parts of the country. This concept could also be done with growing mushrooms. Another idea could be to plant wheat and mill our own flour and sell locally to bakeries and restaurants which could also possibly lead to establishing a bread bakery here in town of daily fresh bread free of preservatives. If not a local bakery, locals could buy the milled flour and have several outdoor bread ovens in different parts of town to be used by families to bake bread for their weekly use. I believe about two to three years back a university agricultural department developed a drought-proof wheat variety. Communities of the future may have to rely on their own and this might be a way to do so. The scenario I have been hearing is that the price of diesel/gas may go up so high since we have so little in reserve that trucks will not be able to deliver food to stores and food will become scarce. Perhaps local community investors with the help of local bank loans could develop these businesses and employ local workers which would help Lebanon. Many small towns rely on one or two types of business to employ the local community, which we are all so grateful for, but I think small communities will have to diversify and think outside the box. So this is just an idea that might be food for thought.

# FULL DOCUMENTATION OF RESPONSES

## VIRTUAL PUBLIC OPEN HOUSE

**What is missing from the city's retail/ entertainment environment that needs to be added? Tell us by placing a comment anywhere in this box.**

- Clothing stores, especially men's. Improvements to the movie theater or construction of a new one styled like Alamo Drafthouse.
- Another theater, perhaps a good concert venue and definitely a good bakery or two would be great additions!
- Actives for children and families. Putt putt, batting cages, go carts, jump park, arcade, etc.
- What attractions, programs, and events would you like to see in Lebanon that do not currently exist (i.e., festivals, annual sports or cultural events)? Tell us by placing a comment anywhere in this box.
- Wow! Can't think of too many more. Lebanon does a great job of this already!
- I'd love to see a "Free Summer Concert Series" set-up at Atchley Park! Maybe a raised concert stage/ shell ( -with electrical service, lighting, mixing and equipment loading access ) could be constructed ( -taking advantage of Atchley's hill contours -along the return half of the park's pathway ) to optimize acoustics/ sight lines and to take advantage of it's natural grass seating. Lebanon residents could enjoy concerts by local Lebanon bands, performers and comedians as well as enjoy regional and national acts ( -paying a small nominal fee to see concerts by national acts charging more ). The concert series would start in May and go through early October. Atchley Park could also be the site of annual July 4th fireworks celebrations. In the community we moved from ( Florissant, Mo. ) this was done at an area park ( St. Ferdinand Park ) and this "Free Summer Concert Series" and annual 4th of July fireworks celebration added greatly to the city's "quality of life". People there loved it. So did I!
- I would like to see historical events revolving around the people or events that actually occurred in the area. Perhaps Harold Bell Wright, the history of the railroad here, or how Lebanon was affected by the building of Lake of the Ozarks, Bennett Springs, the decline of the "magnetic water" theory that brought resort type hotels, etc. There has to be more history in Lebanon than just Rt. 66 or where boats are made. Famous people from here? Inventions, famous events, etc. that took place in the area? Perhaps speakers, informative events, re-enactments, celebrations, etc. around those?
- What parts of the city are not currently being used in the best way possible way when you consider the local economy? Show us where by placing a comment anywhere on the map below. Use the comment text to tell us why and how that might be improved.

## VIRTUAL PUBLIC OPEN HOUSE - INITIAL IDEAS

### INITIAL IDEAS – DRAFT VISION AND CORE VALUES

**The following vision statement and core values have been drafted after analyzing existing conditions data and public feedback to date. What do you think? Is there anything missing? Let us know by placing a comment anywhere on the page.**

- Core Values: “Family oriented. Respecting our history and heritage but prepared for the future. Self-sufficient and providing for ourselves”

### INITIAL IDEAS – DEVELOPMENT AND REDEVELOPMENT

**Initial ideas for growth and redevelopment areas are shown on the map below. What do you think? Are there missing opportunities? Place a comment on the map to show us where and tell us why.**

- Future site of the “Lebanon New technologies Campus”? ( “LNTC” ) <https://locallegendfilms.jimdo.com/lebanon-new-technologies-campus/> ). Keeping Lebanon economically vital for decades into the future!
- Why was the lot I live on marked for “Potential Residential Single Family” development? I live at this location in a Single Family home. Why was undeveloped land in the same area not marked for development? Why was my home marked as a future development and not my neighbors?
- Page 10 - Potential Single Family Development marked in Yellow Rectangle- Herndon Road/Northview Rd area. I own the majority of this land and my house is on this land. Why is it marked as a “Potential Single Family Development when I live on it? This document indicates it will not impact private property rights. Contact me regarding this matter
- Future site of Lebanon’s first TV Station? Isn’t it time Lebanon had it’s OWN TV Station? ( -offering Lebanon’s OWN news, weather, government/community-affairs and police programming, as well as a slate of Lebanon-produced shows -like those proposed on the “Ozarks Down Channel”: <https://locallegendfilms.jimdo.com/ozarks-down-channel/> ). Why should Lebanon residents get their news and entertainment “second-hand” from stations like KY3 and KOLR broadcasting from Springfield when we can get OUR OWN more accurate ( -first-hand ) news reporting/ public affairs and entertainment produced right here in our OWN town
- I can not see a map or diagram to accurately the key.

## VIRTUAL PUBLIC OPEN HOUSE - INITIAL IDEAS

### INITIAL IDEAS – DRAFT RECOMMENDED FUTURE LAND USE PLAN

Initial thoughts for future land uses are shown on the map below. What do you think? Are there land uses that seem misplaced? What is missing? Place a comment on the map to show us where and tell us why

- Park development

### INITIAL IDEAS – MIXED USE CONCEPT

An initial idea for what a mixed use development could look like near existing large scale commercial development along I-44. What do you think? Let us know by placing a comment anywhere on the page

- No comments

### INITIAL IDEAS –DOWNTOWN COMMERCIAL CORRIDOR CONCEPT

An initial idea shows potential improvements to the existing downtown commercial corridor, including development/redevelopment opportunities and pedestrian amenity zones. What do you think? Let us know by placing a comment anywhere on the page.

- No comments

### INITIAL IDEAS – MIXED USE: HEALTH AND WELLNESS CONCEPT

An initial idea showing how the mixed use: health and wellness land use designation could be applied near the existing Mercy Hospital. What do you think? Let us know by placing a comment anywhere on the page.

- I like either of these plans. I would like to see tiny house community. Or storage container type community somewhere. As young adults marry later, larger baby boomer generation retiring (widows/widowers/divorced) or young professionals who do not need or want a 2 or 3 bedroom home, but would be interested in owning and residing in a small new home. Many cities have them, and they can

# FULL DOCUMENTATION OF RESPONSES

## VIRTUAL PUBLIC OPEN HOUSE - INITIAL IDEAS

be made very beautiful where they don't look like mobile homes/storage containers/movable housing. They could be included in the designed plans easily I believe.

### INITIAL IDEAS –CONNECTIVITY FRAMEWORK

**Initial thoughts for transportation and connectivity improvement ideas are shown on the map below. What do you think? Are there missing opportunities? Let us know by placing a comment anywhere on the page.**

- The biggest “connectivity” opportunity Lebanon is missing out on is it’s “connectivity” to neighboring towns like Camdenton and Osage Beach on Highway 5. There are a lot of Lebanon residents who work in Camdenton and Osage Beach ( -and who have to travel round trips of 75 miles each day ) and that’s rough! Similarly, there are people here who’d love to shop or visit stores or entertainment venues in Camdenton or Osage Beach but the cost of gas prevents them from doing so. If Lebanon had a reasonably priced shuttle bus service ( -taking Lebanon residents to/from their jobs or on shopping/ tourism trips to the Lake area ), I think a lot of Lebanon residents would take advantage of it. I know I would!

### INITIAL IDEAS –AESTHETICS AND CHARACTER FRAMEWORK

**Initial thoughts for placemaking improvement ideas are shown on the map below. What do you think? Let us know by placing a comment anywhere on the page.**

- No comments

### WHAT DID WE MISS?

**Did we miss anything? Is there something we need to address? Let us know by placing a comment in the box.**

- When we bought our property the grass was so tall on the median area between the back of our property and the street you could not pass to check the backyard property prior to purchasing. The street is higher than the property where the drain was hidden among the extremely tall grass. Trust me we tried to pass to check it out and could not. Once in the house after a hard rain, the yard was flooded. There is a main city drain coming from the street dropping right onto our property eroding our property that could not be seen at all with the high grass. The builder stated he had built the house within 6 months only to have the neighbors tell us the house had been built for a year. So the builder had to have seen the flooding. The builder never divulged the flooding from the main street. Once we moved in, the city decided to send us a letter telling us we were responsible for maintaining

## VIRTUAL PUBLIC OPEN HOUSE - INITIAL IDEAS

the median. Wow, but never when the original owner of the property, who was on the city council at the time, nor the builder, who was also from Lebanon, was ever responsible for the median when they had the property. So one has to wonder if the grass remained tall as a favor to the city council member and the local builder so they could both unload the property and the house without having to divulge there was a city drain draining onto the property. There is also a creek which also runs through the back of the property. We were told prior to purchasing by the real estate agent that it never floods and drains quickly. Ha! Prior to purchasing, we went to the city to check to see if the property was in a flood zone. The city worker pulled out a city map to give us an answer so they had to have seen the city drain draining onto our property but we were never told about this prior to purchasing. We have contacted Mr. Shockley several times and handed pictures of the flooding and we were told they would come out during the summer, when it is not raining, and tend to it. That has never happened. It would be so decent for the city to come and fix the flooding the city drains are causing before looking to improve other areas. So if there is money to improve Lebanon why don't they come and fix the flooding caused by the city drains first? It is the only right thing to do, but I guess in this day and age doing right by taxpayers is gone in the city of Lebanon. It appears some of the suggestions listed here are from people coming from outside the area wanting to share ideas from the progressive areas they lived in prior to coming to Lebanon. I guess if you were born here or lived here for a while you realize nothing is ever done no matter how many times you reach out for help. It sure would be nice if someone responsible within the city government, who cared about its tax-paying citizens, would reach out to me to take care of this and help me have some faith in the Lebanon city government.

- I guess I didn't see where to put my comments the print is really small and when I zoom in gets blur and alot of swiiping back and forth. 1) heard about a bypass to help with the traffic, perfer not to see a bypass road I believe that would hurt alot of business the same it has in other cities/towns. They seem to end up as ghost towns. If it is only for truck drivers, how would it be forced or how long before it use as a main route? 2) the zoning for restaurants and bars seems to be hard to find when I look for a location. There's a church on every other corner. Not everyone has the type of money to build a new building and get it concrete right away. Cost alot of money. There's not no places in town for a person to go and dance at and hard to find a location due to the new requirements. Can we ease up on them some to make it easier for small business to succeed and move forward? 3) the old hotels that said was a few I ches to small, why can't people live in them instead of being homeless? Most are bigger or same size as a current hotel that people lives in now. 4) maybe care for the homeless population some. The warming center has to be located outside of city limits due to the zoning rules and city laws on it all. 5) I do love being part of Lebanon, but seems like it's all about who you know instead of being for the people, can we change that?
- Flooding in Hillsdale street, this was addressed at ward II town hall. I spoke to a gentleman who agreed a ditch needed to be dug and was told it would be done in July, however never heard anything since and nothing was done. This run off water comes from city streets and floods mine and my neighbor's properties causing damage. How can I get this resolved?
- The flooding will have to be addressed before any development can happen. I see that it is marked for both single family and multi family development in the area that is impacted.

## APPENDIX C CONTENTS

### SUMMARY OF EXISTING PLANS AND STUDIES



# SUMMARY OF EXISTING PLANS AND STUDIES

A critical component of any planning process is examining what has already been done. By reviewing the recommendations of recent plans, the work of this Plan is more focused and tailored to the specific needs that have yet to be addressed. The evaluation of other plans also allows for continuity on a broader scale instead of multiple plans for the same general area that have an individualistic approach. Recent planning efforts, documents, and recommendations thus serve as an integral starting point for this Plan.

# SUMMARY OF EXISTING PLANS AND STUDIES

## 2035 PARKS MASTER PLAN (2019)

The 2035 Parks Master Plan builds on the vision and recommendations for parks and open space established in past comprehensive planning efforts. It includes design principles, individual park improvement recommendations, and initiatives to expand and connect existing parks. Overarching Parks and Open Space Design Principles include the following:

1. Maintain and expand Lebanon's existing ratio of park space to residents and provide new park space to support future population growth.
2. Establish an interconnected network of greenways and trails to connect parks, educational, facilities, and other community amenities.
3. Improve existing parks with new and enhanced recreation facilities, landscapes, and user amenities.
4. Develop a comprehensive bicycle and pedestrian facility network to provide walkable and bikeable access to Lebanon's parks for all residents.
5. Enhance plant and wildlife diversity and improve water quality while reducing long-term maintenance and operation costs.
6. Regularly assess existing recreational facilities and the recreation needs of Lebanon residents, and enhance facilities as necessary to meet those needs.

## FLOYD W. JONES LEBANON AIRPORT MASTER PLAN

The Floyd W. Jones Lebanon Airport Master Plan is an update to the previous master plan. The Federal Aviation Administration requires that airports update their long-term planning documents every ten years. This plan intends to provide a true vision for how LBO is developed, guidance for future development, and justification for projects for which the airport may receive funding. The planning process has eight elements that are intended to provide guidance for future facility needs and support for implementation.

**Element 1** – Initiation: Development of the scope of services, schedule, and study website. General background information will be established that includes outlining the goals and objectives to be accomplished during the Master Plan.

**Element 2** – Inventory: Primarily Focused on collecting and assembling relevant data pertaining to the airport and the area it serves.

**Element 3** - Aviation Demand Forecasts: Examine the potential aviation demand at LBO (Floyd W. Jones Lebanon Airport)

**Element 4** - Facility Requirements: Determine the available capacities of various facilities at the airport, and what facility updates or new facilities will be needed to comply with FAA requirements and/or projected 20-year demand.

**Element 5** - Airport Development Alternatives: Consider a variety of solutions to accommodate projected airside and landside facility needs through the long-term planning period.

**Element 6**- Airport Plans/Land Use Compatibility: Involves coordination with airport staff and the Airport Advisory Board and will result in the selection of a recommended development concept.

**Element 7** - Financial Management and Development Program analyzes the costs that may be associated with the development plan.

**Element 8**– Final Reports and Approvals: Will include production of the draft final report and ALP drawings in print and digital form.

Based on analysis of existing facilities and forecasted demands, recommendations are made to maintain airport land use compatibility within the LBO area. By rezoning the airport property to commercial or industrial, there would be more opportunities for development. This can also be accomplished by updating references of the Airport Zoning Map in the City of Lebanon's municipal code and utilizing a compatible use overlay district the airport area. Additionally, the City of Lebanon could limit the height of buildings located near the airport and modify the uses within the vicinity to not cause hazard for the community. The safety and integrity of the community can also be protected by establishing Fair Disclosure Requirements for real estate transactions within the vicinity of the airport stating potential aircraft noise or overflights.

The plan also recognizes the possibility of waste from the airport and provides recommendations for maximizing waste reductions. As a key component of the plan, an environment review identifies whether actions could individually or collectively significantly affect the quality of the environment.

## **CITY OF LEBANON COMPREHENSIVE PLAN (2005)**

The purpose of this edition of the comprehensive plan is to provide new ideas that improve the quality of life for current and future citizens of Lebanon. The preparation of this plan is largely based on population, economic, land use, transportation, and other concerns stressed by Staff.

Lebanon is the largest population center within Laclede County which is experiencing steady growth since the early 1990's. As an economic center for the county, the largest sector of economy is manufacturing, but the city has experience decline in the industrial job base. Lebanon currently has a private/public joint venture with America's Heartland Economic Partnership to attract economic development opportunities in retail and service sectors. This partnership was implemented to increase the citizens standard of living, strengthen existing industries, diversify wealth creating economy, and expand the property and sales tax base.

Following an analysis of concerns over existing infrastructure including transportation, utilities, and public safety, there were several recommendations that were proposed as a guide for future decisions. The recommendations are as follows:

1. **Redevelop Elm Street:** By reconstructing the connections to Elm Street, many retail development opportunities will emerge as well as aid in the flow of traffic.
2. **Perimeter Annexation:** To facilitate growth, the city must consider annexation possibilities near the perimeter.
3. **Traffic Route from Industrial Park to Highway 5:** A bypass between Industrial Park and Highway 5 will help alleviate traffic issues and provide accessibility in the area.
4. **Emerald Street Extension:** By rerouting Fremont St to Emerald, this will maximize frontage and accessibility to Highway 5 South.
5. **Recreational Opportunities:** Include more bike and walking paths for those that use these regularly and add more youth programming opportunities.
6. **Business Park and Neighborhood Commercial Class:** Create a business park for enterprises so that they are not located on busy thoroughfares and create a neighborhood business zone to protect the character of these such business buildings.
7. **Fire and Police Staffing and Training Facilities:** Designate a Public Works facility to serve as training grounds for Fire and Police.
8. **Education:** Extend the Nelson Education center to meet demands of the future
9. **Sales Tax base expansion and Perimeter Planning:** Create an ordinance that expedites the approval of site plans for commercial zoning areas and apply basic planning concepts to areas just outside city limits.

## LEBANON HOUSING UPDATE

This plan provides a detailed profile of the region's economic and housing characteristics include Laclede, Camden, Morgan, and Miller County. Lebanon is the largest city within Laclede County and has come a center of commerce for the region. Based on projections and

Stakeholder groups comprised of developers, financial institutions, real estate agents, and other significant figures were able to establish challenges and opportunities primarily faced by Laclede County and the cities of Lake of the Ozarks Regional Economic Development area. The workforce has trouble finding larger family homes in the region because of the construction deficit, and the homes are usually low in quality. Some of the smaller communities do have sufficient staff to implement housing rehabilitation programs that could potentially serve low-income residents, young professionals, and seniors. Since the housing stock has been in short supply, particularly around the lake, many have decided to move into more rural areas because of the larger lots and affordable housing options. This creates a sprawling effect that will cause homes spread out in scatter patterns to depreciate, and these communities cost more to provide basic infrastructure since they are further away from city center.

To prosper in the future, cities should continue to invest in existing housing stock to increase the overall quality of life. The workforce of quality builders need to be improved to meet demands of the housing market including affordable housing. Lake of the Ozarks Regional Economic Development Council additionally needs to invest in investments that benefits parks, public spaces, sidewalks, and landscaping.

## **SURVEYS**

The City of Lebanon distributed surveys in 2018, 2020, and 2022 that measured the satisfaction of the delivery of city services such as utilities, public safety, city leadership, code enforcement, and overall perception of the city. In 2022, Lebanon distributed a Parks and Recreation survey to measure the satisfaction of facilities. In the same year, a business survey was distributed to gain perspective on satisfaction of business owners.

## **STORMWATER MANAGEMENT PLAN**

This document was created to provide information and recommendations for maintenance and improvements to the existing street network within the city. After receiving PCI scores, the city recommended that 40 percent of the total street fund be spent on maintaining the transportation network system. The plan divides this investment into two categories: Direct and Indirect spending. Direct spending opportunities include patching potholes, sub grading drive surfaces, filling street cracks, and surface treatments that delay damage to the driving surface. The city can apply indirect spending to replace street maintenance equipment, manage the storm water conveyance system, manage and inspect the right of way streets, maintain vegetation along streets, remove debris, and repaint street markings and signage.

This plan highlights the investment opportunities in capital improvements including surface treatment, incorporating asphalt concrete over road surfaces, removing surfaces to fill with asphalt concrete, totally replacing existing street systems, or constructing items to add to the streetscape for the purpose of safety. There are several projects listed by classification that were identified as capital improvement priority projects.

## **STREET DIVISION OVERVIEW**

This document is responsible for addressing the needs of maintenance and expansion of transportation needs of the city such as existing public roads, sidewalk improvements, and maintenance equipment. Each project is listed with a short description, street division, jurisdiction, a photo of conditions, and a funding source. Chosen projects are based upon the Street Master Plan, maintenance requirements, citizen and staff needs, and requests from City Council. Funding for these projects uses the revenue from the transportation tax, gas tax, grants, and cooperative efforts from MoDOT Lebanon Special Road District #1. The largest asset to funding is the transportation tax and the street fund at 82 percent.

**[PAGE INTENTIONALLY LEFT BLANK]**

## APPENDIX D CONTENTS

### ECONOMIC AND MARKET ANALYSIS

D

# ECONOMIC AND MARKET ANALYSIS

This appendix outlines market strategies and opportunities for the future of Lebanon, providing an objective review of market conditions with the city and recommendations for improvements and future uses. Please note this report does not represent the recommendations of the Lebanon MO Plan 2040 Comprehensive Plan, but used in the formulation of the final Plan recommendations as it provides objective, market-based information.

## SUMMARY OF MAJOR FINDINGS

Olsson has been retained to prepare a Comprehensive Plan for the City of Lebanon, Missouri. As a sub-consultant to Olsson, Canyon Research Southwest has prepared an *Economic and Market Analysis* that evaluates demographic, economic, and real estate market trends impacting land use and development patterns in Lebanon, Missouri. The study findings and recommendations are summarized in the text to follow.

### **Economic and Demographic Trends**

Lebanon is Laclede County's principal employment center, supporting 13,611 jobs, or 82.6 percent of the county total. Employment in Lebanon is led by the retail trade, manufacturing, healthcare services, and wholesale trade sectors. Industrial-related jobs account for 31.3 percent of Lebanon's total employment, compared to 28.1 percent statewide.

Over the past five decades Lebanon's population has grown steadily. The city's population increased by 10.3 percent during the 1980's, 5.0 percent during the 1990's, 21.8 percent in the 2000's, and 19.1 percent in the 2010's adding a total of 4,967 residents. From 2010 to 2020, the city's population rose 3.7 percent, reaching 15,013 residents. By 2023, Esri estimated the city's population at 15,282 residents, accounting for 42.2 percent of the county total.

When compared to statewide averages, Lebanon's household composition possesses **below average** rates for both of families, married couples, and married couples with children and **above average** householders living alone and senior households ages 65 years and over living alone.

Children ages 0 to 14 years and empty nesters 45 to 64 years comprise the largest age groups in Lebanon with 22.1 percent and 22.0 percent of the total population, respectively. Lebanon's elderly ages 65+ account for 18.3 percent of the population which exceeds the statewide rate of 14.0 percent. Lebanon also supports a lower percentage of adolescents ages 15 to 24 years.

Lebanon's slightly below average educational attainment levels place a constraint on achievable income levels, retail expenditures, and housing values and rents.

Lebanon's well below average household income levels place a constraint on achievable retail sales, housing values, and residential rents. An estimated 28.2 percent of Lebanon households earn less than \$25,000 annually, indicating a strong need for affordable and income-based housing.

By 2040, the Lebanon economy is forecast to add 1,148 to 1,745 jobs, yielding population growth estimated at 2,074 to 2,956 residents, generating the need for new housing, retail goods and services, eating and drinking establishments, and commercial and industrial space.

Census Tract 9603.1 located adjacent to the north, east, and south edges of Lebanon support a population of 3,107 residents. These county residents are primarily married couples with children, are better educated, and possess higher household incomes. The presence of this county population has a positive impact on Lebanon's retail sales, demand for commercial space, and labor force.

## **Real Estate Market Trends**

The study evaluated Lebanon's retail, office, industrial, and housing markets. The text to follow summarizes the major study findings.

### **Retail Market Overview**

As the largest city in Laclede County, Lebanon serves as the county's principal shopping destination, supporting 1.5 million square feet of commercial space. Downtown Lebanon along Commercial Street served as the city's original business district supporting a large retail presence. Alternative retail districts have emerged along the Jefferson Avenue corridor with concentrations of businesses both north and south of the Interstate 44 interchange.

Since 2019, Lebanon's retail space has operated at a vacancy rate well below market equilibrium with annual vacancy rates ranging from 4.0 percent to 6.3 percent. Throughout the third quarter of 2023, the Lebanon retail market absorbed 35,716 square feet of commercial space, reducing the overall vacancy rate to 3.9 percent. The modest inventory of vacant retail space in Lebanon available for occupancy places a constraint on the expansion of existing retail businesses and attracting new retail businesses.

Despite serving as Laclede County's principal shopping destination, Lebanon's retail market is narrow and shallow, lacking in such areas as men's clothing, high-end grocery, sit-down restaurants, and entertainment. Residents must travel outside of Lebanon to satisfy many of their shopping needs and commonly travel within a one-hour drive to such retail destinations as Lake of the Ozarks and Springfield.

Downtown Lebanon encompasses a 6-block area along Commercial Street from Van Buren Avenue north to Washington Avenue. Downtown Lebanon maintains approximately 380,000 square feet of ground floor commercial space occupied by a variety of boutique shops, restaurants, hair salons, financial institutions, and historical buildings.

Jefferson Avenue from the Interstate 44 interchange west to 7<sup>th</sup> Street is an older commercial corridor housing several strip centers and such businesses as Walgreens, Aldi, King Cash Saver, Price Chopper Plus, True Value, Applebee's, and several bank branches and fast-food restaurants.

A new retail hub has emerged along Jefferson Avenue from Interstate 44 south to Bland Road. The 131,127 square foot Lebanon Marketplace is anchored by Big Lots, Tractor Supply, Harbor Freight, Ashley Outlet, Shoe Sensation, Napa, and Petsense. Other notable retailers operating along the south Jefferson Avenue corridor include Lowe's, Walmart, Hibbett Sport, Factory Connection, Cato, and Dollar Tree.

Lebanon's 2023 population of 15,282 residents and estimated Trade Area Capture ("TAC") of 40,130 people illustrates the City's status as the retail shopping destination. Lebanon's retail pull factor of 2.63, indicates the city captures retail sales at a rate 163 percent higher than the statewide average. Lebanon's above average pull factor suggests it captures significant retail sales from people residing outside of the city.

Through 2040 the City of Lebanon is estimated to support the net absorption of 182,000 to 255,000 square feet of retail space, resulting in the development of an estimated 18 to 29 acres of commercial land.

### Office Market Overview

Office-related employment in the information, professional services, legal services, and finance, insurance, and real estate sectors account for 9.2 percent of Lebanon's total employment, compared to 21.4 percent of employment in Missouri.

Lebanon maintains 253,679 square feet of professional and medical office space. The Jefferson Avenue corridor and downtown serve as the prominent office districts.

For most of the past decade the Lebanon office market has operated at full occupancy. By year-end 2022, the overall vacancy rate was reported at 2.4 percent, but by the third quarter 2023 the market was again operating at full occupancy. The absence of vacant office space available for immediate occupancy serves as a constraint to accommodating the expansion of existing tenants or attracting new businesses to Lebanon.

Through 2040, the City of Lebanon is estimated to support the need for 37,000 to 62,000 square feet of professional office space and 20,900 to 28,500 square feet of medical office space.

### Industrial Market Overview

Industrial-related employment in Lebanon totals 4,267 jobs in the manufacturing, wholesale trade, and transportation and warehouse sectors, or 31.3 percent of total employment. By comparison, industrial-related jobs account for 28.1 percent of employment in Missouri.

The largest concentrations of industrial space are south of downtown along the railroad line and within the Interstate 44 corridor near the three interchanges servicing Lebanon. Notable industrial businesses in Lebanon include Tracker Marine, Emerson Climate Technologies, Missouri Cooperage, Durham Company, G-3 Boats, and Lowes Boats.

The Lebanon industrial market supports over 1.95 million square feet of space. Since 2020, the surveyed industrial properties in Lebanon remained at or near full occupancy. The modest inventory of vacant industrial space available for immediate occupancy is a constraint to attracting prospective businesses.

Ice Cream Factory (ICF) of Eldon has purchased an 86,000 square foot former industrial facility in Lebanon that will serve as the company's new manufacturing plant. Renovations are underway with the facility creating 130 total jobs over the next five years.

The City of Lebanon owns the Lebanon Industrial Park at U.S. Route 66 and Wyota Drive. Existing businesses include Durham C-Line Division, Detroit Tool, and Dowco. Construction has started on three new businesses with 40 to 50 acres remaining available for future development.

From 2023 through 2040, industrial job growth in Lebanon is projected to support the need for 346,000 to 663,000 square feet of industrial space.

## Residential Housing Market Overview

Over the past 40 years the Lebanon's housing stock has increased steadily. The 1980 Census reported the Lebanon housing stock at 4,253 dwelling units. By 2023, Lebanon's housing stock increased by 63.8 percent to 6,966 dwelling units. Housing stock growth was the highest from 2000 to 2010 when 963 new housing units were added.

Lebanon's northwest quadrant will remain as the leading location for upscale single-family housing, with the southern portion of the city continuing to support new entry-level and move-up for-sale housing.

The age of the City of Lebanon housing stock is slightly newer than the statewide inventory. Homes built since 1980 account for 52.0 percent of Lebanon's existing inventory and 25.8 percent built prior to 1960. By comparison, 46.7 percent of the state's housing stock was built since 1980 with 27.3 percent built prior to 1960.

Lebanon's housing stock mix is influenced by its rural character whereby the demand for single-family housing exceeds that for attached rental housing. Detached single-family housing accounts for 64.0 percent of the housing stock in Lebanon compares to the statewide rate of 70.5 percent.

Multi-family housing accounts for 22.9 percent of Lebanon's housing stock compared to 20.2 percent for Missouri. Large-scale properties in Lebanon with 20 or more dwelling units' total 4.9 percent of the housing stock, compared to 5.2 percent statewide. Duplexes account for 7.0 percent of the Lebanon housing stock compared to 3.3 percent for Missouri. Properties with 3 to 9 housing units account for 7.0 percent of Lebanon's housing stock, compared to 8.3 percent statewide.

Over the past twenty years rental housing has garnered an increasing share of Lebanon's occupied housing stock. From 43.5 percent in 2000, the share of renter-occupied housing units reached 49.6 percent by 2020. Owner-occupied housing declined from 56.5 percent in 2000 to 50.4 percent by 2020 while renter-occupied housing increased from 43.5 percent in 2000 to 49.6 percent by 2020. By comparison, during 2020 the Missouri housing stock was reported at 67.1 percent for owner-occupied housing units and 32.9 percent with renter-occupied housing units.

Lebanon's housing occupancy rate improved from 88.1 percent in 2015 to 90.2 percent by 2021. The statewide housing occupancy rate for 2021 averaged 87.5 percent.

During 2012 the median housing value in Lebanon of \$95,400 lagged the statewide median of \$171,800. From 2012 to 2021 the median home value in Lebanon appreciated 15.3 percent to \$110,000 compared to a 24.1 percent increase for the State of Missouri.

Forty-five percent of the owner-occupied housing stock in Lebanon is valued under \$100,000, compared to just 23.5 percent statewide. Meanwhile, housing valued at more than \$200,000 accounts for 17.1 percent of Lebanon's housing stock compared to 41.4 percent statewide. The price range for first-time homebuyers generally ranges from \$175,000 to \$250,000. Given the cost of land, infrastructure, and construction, it is difficult to meet the need for first-time home buyers.

From January 1, 2022, through July 31, 2023, a total of 446 homes sold in Lebanon garnering an average price of \$177,209 and a median price of \$162,000. The most active portions of Lebanon for home sales included the northern and southern areas of the city. A reported 46.4 percent of all

home sales in Lebanon were priced from \$100,000 to \$199,999, representing the bulk of the first-time homebuyer market. Housing priced at \$200,000 to \$249,999 accounted for just 8.1 percent of total sales. Upscale housing priced at \$250,000 and above accounted for 24.7 percent of all home sales.

For 2021, detached single-family homes accounted for 90.4 percent of all occupied owner-occupied housing units in Lebanon. Meanwhile, renters were much less likely to occupy detached single-family homes accounting for just 38.7 percent of all occupied rental units. Multi-family properties with ten or more units were the most popular attached housing product for renters accounting for 18.0 percent of all renter-occupied units.

Housing stress occurs when the cost of housing (either as rental or as a mortgage) is high relative to household income. A household spending 30 percent or more of its income on housing can be considered under housing stress. The gross rent for 41.1 percent of renter households in Lebanon accounts for 30 percent or more of total income compared to 44.8 percent statewide, suggesting a need for additional affordable and income-based housing in both Missouri and Lebanon.

Lebanon has 14 large-scale apartment properties totaling 681 dwelling units. Four apartment properties totaling 180 dwelling units are market-rate and ten income-based properties include 242 family units and 259 senior housing units. Since 2010, three new large-scale apartment properties were built in Lebanon totaling 82 rental units.

From 2019 to 2022, the apartment properties have operated at a health vacancy rate below market equilibrium. The modest inventory of vacant apartments available for immediate occupancy places a constraint on households seeking to move to Lebanon or existing residents seeking a better apartment.

Over the past decade the average rent for large-scale apartment properties in Lebanon increased by 45.6 percent, reaching \$664 per month by the third quarter 2023. Despite the strong growth, the average rent remains well below the state-wide average.

From 2023 through 2040, the City of Lebanon's forecast population growth is anticipated to create the need for an estimated 871 to 1,242 new housing units. Lebanon's current mix of occupied housing units is 55.7 percent owner-occupied and 44.3 percent renter occupied. Given the city's population age composition, household income levels, and existing housing stock, from 2023 through 2040 the housing need is estimated to be segmented 55 percent owner-occupied and 45 percent renter occupied. Therefore, by 2040 the mix of new housing inventory is estimated at 479 to 683 homeownership units and 392 to 559 rental units.

## **Study Conclusions**

Based on the findings of the *Economic and Market Analysis*, the following topics were addressed: 1) 20-year need projections for commercial, industrial, and residential housing and 2) citywide development opportunities.

## **Commercial, Industrial, and Residential Need Projections**

The table below summarizes the need through 2040 in the City of Lebanon for commercial and industrial space as well as residential housing units.

By 2040, Lebanon's increased population is forecast to generate additional retail sales capable of supporting 182,000 to 255,000 square feet of new retail space.

From 2023 through 2040, office-related job growth in Lebanon is projected to support the need for 37,000 to 62,000 square feet of professional office space with population growth yielding the need for 20,900 to 28,500 square feet of medical office space.

By 2040, industrial job growth in Lebanon is projected to support the need for 394,000 to 710,000 square feet of owner-occupied and speculative industrial space.

Through 2040, Lebanon's forecast population growth is estimated to generate the need for 871 to 1,242 residential dwelling units.

### **Forecast Retail, Office, Industrial and Residential Need Lebanon, Missouri; 2023 to 2040**

		Growth Population	2023-2040 Jobs		Net Conservative	Gain Optimistic
Retail		2,074 – 2,956			182,000 SF	255,000 SF
Office			115 - 196		57,900 SF	90,500 SF
Industrial			287 - 524		394,000 SF	710,000 SF
Housing		2,074 – 2,956			871 Units	1,242 Units
Ownership Units					474 Units	683 Units
Rental Units					392 Units	559 Units

Assuming an average floor-area-ratio ("FAR") of 0.2 to 0.4 for the retail, office and industrial space and an average density of 4.0 to 5.0 dwelling units per acre for single-family housing and 15 dwelling units per acre for multi-family housing, a through 2040 the City of Lebanon is estimated support the development of approximately 180 to 216 acres of land under the conservative scenario and 261 to 317 acres under the optimistic scenario.

**Forecast Land Area Absorption in Acres  
Lebanon, Missouri; 2023 to 2040**

Land Use	Conservative Scenario	Optimistic Scenario
Retail	18 – 21	21 – 29
Office	4 – 5	7 – 8
Industrial	23 – 26	41 – 47
Residential	135 – 164	192 – 233
<b>Total Acres</b>	<b>180 – 216</b>	<b>261 – 317</b>

**Land Use Patterns and Development Opportunities**

Based on the study findings and future need projections, future development opportunities in Lebanon, Missouri for retail, office, industrial, and housing have been identified.

Given the City of Lebanon's infrastructure, topography, highway access, and existing land use patterns, over the next twenty years urban expansion will favor the southeast, southwest, and northwest quadrants of the city. Jefferson Avenue will remain as Lebanon's dominant corridor for commercial activity with the Interstate 44 corridor continuing to evolve as an employment center. The City's northwest quadrant will remain as the leading location for upscale housing, with the southern portion of the city along Beck Lane, Fremont Road, and Tower Road continuing to accommodate new entry-level and move-up single-family housing. Downtown will continue to support redevelopment activity including retail, office, mixed-use, and infill housing.

South Jefferson Avenue will continue to serve as Lebanon's dominant retail growth corridor. The recommended future retail development sites are positioned within the corridor's existing hub at MO 32 and Jefferson Avenue.

1. Approximate 10 acres at the southeast corner of MO 32 and Jefferson Avenue
2. Vacant land east of Lowe's and Walmart between MO 32 and Bland Road
3. Outparcels within the Lebanon Marketplace
4. Vacant parcel at the southwest corner of Evergreen Parkway and Jefferson Avenue
5. Vacant parcel between Evergreen Parkway and Bland Road west of Jefferson Avenue
6. Vacant parcel at the northeast corner of Jefferson Avenue and Jerald Avenue

Other prospective commercial development sites are located along the Interstate 44 corridor, U.S. Route 66, MO 32, and Lynn Street:

1. Vacant land west of the Interstate 44 from the Elm Street interchange south to Equestrian Road
2. Vacant land on the east side of Interstate 44 north of the Ivey Road alignment
3. Vacant land at the southwest corner of Interstate 44 and Millcreek Road
4. West side of Morgan Road south of Slate Street

5. Vacant land at the northwest corner of Slate Street and Boulder Avenue
6. Northwest corner of MO 32 and Cowan Drive
7. Vacant land on the south side of MO 32 between Cowen Drive and Tower Road
8. East side of Lynn Street from Keller Road north to city limits
9. West side of Lynn Road north of Goldenwood Road

Elm Street also serves as a commercial corridor. To promote revitalization of the Elm Street corridor the north and south segments should be designated as redevelopment districts. Proposed redevelopment district boundaries for the north end of Elm Street extend from Mills Drive north to the Interstate 44 interchange and to the south from Bland Road south to the Interstate 44 interchange. Public funding in the form of Tax Increment Financing ("TIF"), Community Improvement District ("CID"), or Transportation Development District ("TDD") should be made available to assist property owners to invest in their properties.

Eighty-two businesses operate along Commercial Street in downtown Lebanon, including 53 retail businesses and 29 personal and business services. Prominent retail businesses include hair salons and barbers, restaurants, boutiques and clothing stores, photo studios, and dance studios. Office tenants include law firms, insurance agents, financial planners, banks, accountants, title companies, tax preparers, bail bonds, and surveyors.

Emphasis should be placed on strengthening the 3-block portion of Commercial Street from Van Buren Avenue and Madison Avenue which consists primarily of one-story commercial buildings. An increased inventory of commercial space, businesses, and residents could be accommodated downtown through infill development of under-utilized properties.

Downtown will continue to support redevelopment activity featuring retail, office, mixed-use, and infill housing. Future efforts should focus on providing entertainment, community events, and a public gathering place.

Creating additional residential housing units downtown should be a priority. Potential housing formats include upper floor apartments as part of mixed-use development along Commercial Street and infill single-family and small-scale multi-family housing on vacant land and under-utilized properties along 2<sup>nd</sup> Street.

The Commercial Street corridor in downtown Lebanon is ideal for future retail and mixed-use development. The recommended redevelopment sites listed below consist of underutilized properties that can support more intensive development.

1. Northeast corner of Commercial Street and Van Buren
2. Northwest corner of Commercial Street and Van Buren
3. Freestanding building at southeast corner of Commercial Street and Jackson Avenue
4. One-story commercial at southeast corner of Commercial Street and Jefferson Avenue
5. Three-story building at the northeast corner of Commercial Street and Adams Avenue
6. Freestanding building at the southwest corner of Commercial Street and Washington

Generating employment opportunities should be a priority of the Lebanon Comprehensive Plan as jobs support population growth and economic development. Expanding the high school curriculum to include more industrial trades would assist in fostering a more diversified economy for Lebanon. Future industrial development in Lebanon is best suited along the Interstate 44 corridor.

Warehouse, logistics, manufacturing, and industrial flex uses would be suitable for the Interstate 44 interchanges at Millcreek Road, Jefferson Avenue, and Elm Street. Given existing development patterns the vacant land within the City of Lebanon that is recommended to be designated for future industrial use includes:

1. Vacant land at the northeast corner of Cowan Drive and Millcreek Road
2. Vacant land on the north side of Millcreek Road west of Carmeco Road
3. City-owned industrial park at U.S. Route 66 and Wyota Drive
4. Interstate 44 corridor north of the city limits
5. Southwest corner of Commercial Street and Beck Land south to Bland Road alignment

Continued population growth will fuel the need for additional professional office space in Lebanon. The presence of Mercy Hospital and Lake Regional Lebanon Campus will generate the future need for additional medical office buildings along Cowan Drive. Lebanon should promote itself as a regional medical destination. The following properties in Lebanon were identified as potential professional and medical office development sites.

1. Under-utilized properties along Commercial Street in downtown Lebanon
2. Under-utilized properties along Jefferson Avenue from Commercial Street west to 7<sup>th</sup> Street
3. Vacant parcel between Evergreen Parkway and Bland Road west of Jefferson Avenue
4. Vacant land on the east side of Cowan Drive from Copeland Drive north to Millcreek Road
5. Vacant land surrounding the Mercy Hospital Lebanon
6. Vacant land on the east side of Cowan Drive from Copeland Drive north to Millcreek Road

Given Lebanon's smalltown atmosphere, high quality of life, modest housing values, and healthcare facilities, it seems a potential market may exist for attracting empty nesters and retirees from outside of the community. Also, the COVID-19 pandemic accelerated the trend for working remotely. Rural communities are capitalizing on this trend by providing a desirable quality of life for a growing workforce that can now decide where to live separately from where the job originates.

To foster future economic development and population growth in Lebanon a wider mix of both owner-occupied and rental housing products is needed suitable for accommodating a broad population and labor force. This could be accomplished through renovation of the existing older housing stock, new small-scale infill housing, and development of greenfield parcels at the periphery of the city with street access and utility services at or near the property. A more diversified housing stock can be achieved by focusing on providing additional income-based family and senior rental housing, for-sale and rental infill housing, entry-level and move-up for-sale housing, and market-rate rental housing.

Entry-level, for-sale housing and market-rate apartments are needed to support a workforce for such business sectors as manufacturing, logistics, retail, and personal services. Upscale for-sale housing is needed to retain and attract upper management, entrepreneurs, physicians, and other high-income households.

Challenges of providing affordable for-sale housing in Lebanon include below average household income levels, lack of skilled construction trades, and the higher costs of labor and materials relative to metropolitan areas. These factors make it difficult for builders to provide entry-level housing priced under \$250,000. The city could consider a variety of options to assist in supporting entry-level, for-sale housing, including funding public utility extensions, waiving utility connection fees and

building permit fees, and lowering the subdivision street design requirements for those subdivisions targeting entry-level housing.

Affordable and income-based housing could be provided through infill development and the rehabilitation of existing housing within older, established neighborhoods in Lebanon. Existing neighborhoods possess street improvements and utilities services, thus reducing site costs and improving the potential to support entry-level, for-sale housing.

Potential infill housing types include detached single-family homes, attached twin homes, townhomes, and small multi-family properties. A variety of economic incentives could be offered to stimulate new infill housing. Possible examples include tax abatement, public financing such as tax increment financing, waiving permit and utility connection fees, city-sponsored land banking, and public-private partnerships to assist in infrastructure improvements.

Downtown Lebanon could benefit from the construction of new rental apartments with potential sites including vacant lots and under-utilized properties along 2<sup>nd</sup> Street. New housing at the periphery of downtown would create a more vibrant urban environment and provide customers for downtown businesses.

The city's high rate of households with annual income of less than \$35,000 generates a strong need for both market-rate and income-based rental housing as these households are generally chronic renters. The need for rental housing is evident in the fact that renter-occupied housing accounts for 49.6 percent of Lebanon's occupied housing stock. Increased emphasis is needed to provide additional market-rate and income-based rental housing. Doing so will support a labor force needed to facilitate economic development.

Lebanon's large empty nester population ages 45 to 64 years and senior population 65 years and older supports the growing need for market-rate senior apartments. Lebanon's large population earning less than \$25,000 annually also suggests a strong need for income-based senior apartments.

Multi-family residential development sites are best located along major arterial corridors, close to jobs and retail, and infill locations within mature neighborhoods. Prospective multi-family residential development sites in Lebanon include:

1. Vacant land east of Jefferson Avenue north of Allison Drive
2. Vacant land east of Jefferson Avenue south of Allison Drive
3. Vacant land on the east side of Beck Lane south of Utah Street
4. East side of Beck Lane between Ice Cream Way and Evans Road
5. Vacant land at the southeast corner of Morning Star Drive and New Buffalo Road
6. Small-scale multi-family development is best suited on infill sites in the older, mature neighborhoods surrounding downtown Lebanon.

Continued new single-family housing construction should be supported at the periphery of the city that is currently serviced with roads utilities and where existing single-family subdivisions are present. The northwest and southern portions of Lebanon will continue to be the dominant location for new home construction. Prospective single-family home subdivision greenfield development sites in Lebanon include:

1. Lebanon's far northwest quadrant west of Highway 5 and north of Keller Drive
2. North side of Millcreek Road east of Boswell Elementary School
3. West side of Beck Lane in Lebanon's southwest quadrant
4. Vacant land on the west side of Tower Road and Mountrose Street
5. Vacant land on the south side on Mountrose Street east of Hillsdale Street
6. Vacant land on the east side of South Jefferson Avenue north of Fremont Road
7. Vacant land on the south side of Fremont Road west of South Jefferson Avenue

**ECONOMIC AND MARKET ANALYSIS  
CITY OF LEBANON COMPREHENSIVE PLAN  
LEBANON, MISSOURI**

November 2023

## INTRODUCTION

As a sub-consultant, Olsson has retained Canyon Research Southwest, Inc. to assist in the preparation of the City of Lebanon, Missouri Comprehensive Plan ("Planning Area"). The sub-consultant agreement calls for the following scope or work.

1. An economic and market analysis that evaluates the potential for the City of Lebanon to support future development of a variety of land uses and housing types.
2. Identify and analyze Lebanon's existing residential, commercial, office, and industrial market conditions.
3. Forecast Lebanon future need for housing units and commercial/industrial space.
4. Land use recommendations resulting from the findings of economic and market analysis, stakeholder interviews, and visioning and planning workshop.

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

The *Economic and Market Analysis* evaluates the historic, current, and future economic, demographic, and real estate market forces that influence the future urban growth patterns for the City of Lebanon ("Planning Area"). In doing to the report consists of two sections, including: 1) Demographic and Economic Analysis and 2) Market Analysis.

The *Economic and Demographic Analysis* section of the study identifies the economic trends and demographic characteristics that impact the Planning Area's future need for commercial and industrial space as well as residential housing units. Economic forces and demographic characteristics evaluated include employment growth and composition, population growth, household composition, age distribution, household income, and educational attainment. Opportunities and constraints in the City's ability to attract continued economic and population growth are identified.

The *Market Analysis* portion of the study evaluates competitive retail, employment, and residential market trends impacting the Planning Area. The market trends for each prospective land use were evaluated by quantifying such market forces as the inventory of housing units and commercial/industrial space, historical construction activity, and recent development patterns. Potential development sites within the Planning Area were evaluated to identify future locations for the development retail, office, industrial, and residential land uses.

Commercial corridors and districts were evaluated for the ability to compete in the future with emerging business locations and potential to adapt and support redevelopment and repositioning to remain viable and relevant. Newer greenfield development locations were evaluated to determine the ability to support the needs of emerging economy and define market positioning.

Lebanon's housing market was researched for affordability, attainability, how to appropriately blend multiple formats, and how to balance new development with existing housing stock. The study's

housing component takes a long-term and sustainable approach to understand and identify marketplace gaps and where existing stock satisfies need.

Based on the study findings, the Planning Area's long-term demand projections were prepared quantifying the need for additional commercial and industrial space as well as residential housing units and land absorption estimates. Based on the results of the long-term need projections future land use patterns and development opportunities are identified.

## **Planning Area Defined**

The City of Lebanon (the "Planning Area") is in south-central Missouri along Interstate 44 that provides direct access to the St. Louis MSA to the northeast and the Springfield MSA to the southwest. Interstate 44 interchanges at Millcreek Road, Jefferson Avenue (MO 5), and Morgan Road/Elm Street. Lebanon is the Laclede County seat. The Lebanon Micropolitan Statistical Area consists of Laclede County. The City of Lebanon zoning map on page 3 depicts the Planning Area boundaries and land uses. City of Lebanon, Laclede County, and State of Missouri demographic characteristics as provided by Esri Business Analyst are summarized in the table on page 4.

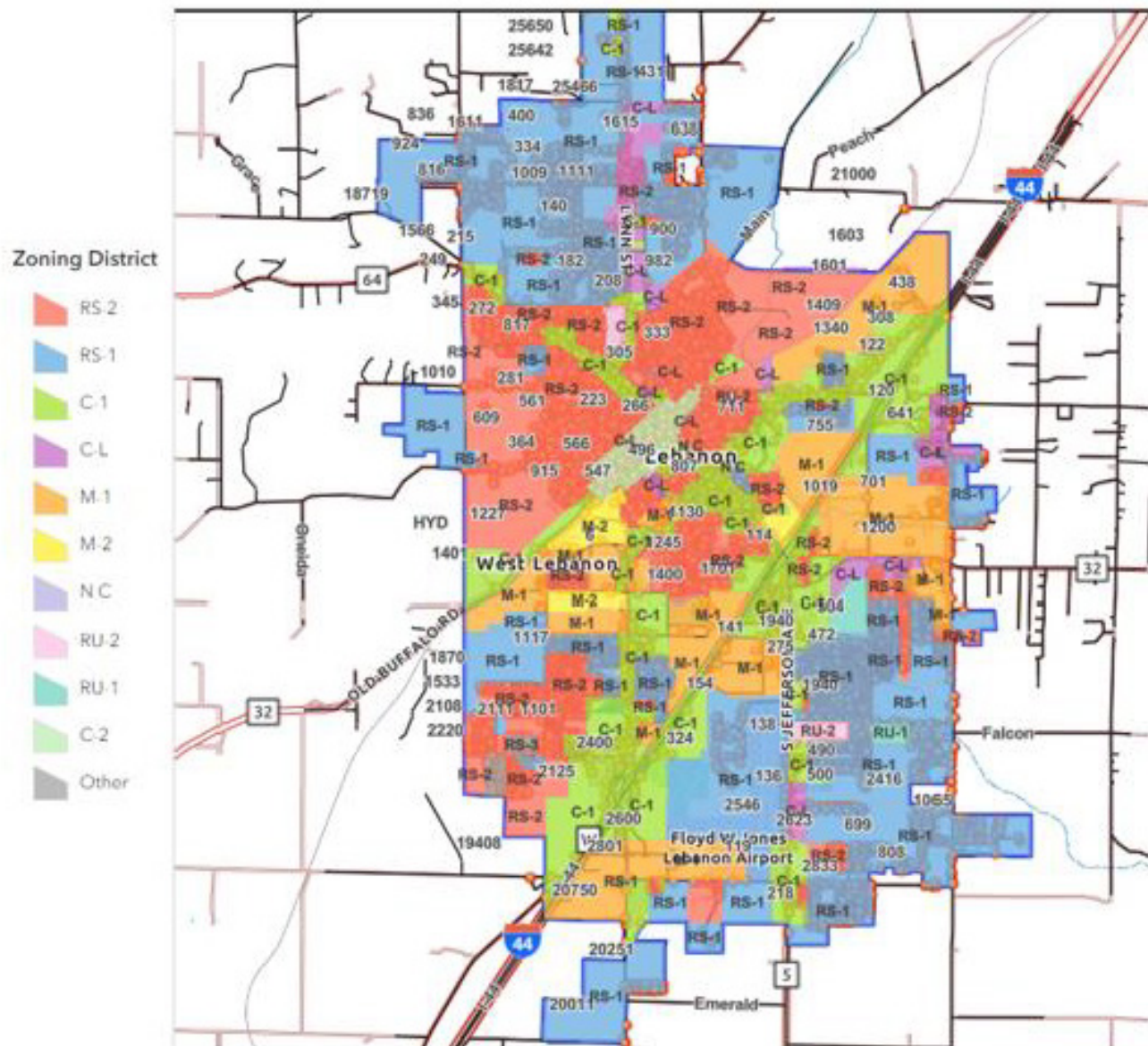
Lebanon was founded in 1849 and was named after Lebanon, Tennessee, the former home of many of the first settlers. The city boundaries encompass 14.63 square miles of land area. The U.S. Census Bureau estimated Lebanon's July 1, 2022, population at 15,232 residents in 5,979 households. State Highway MM is the principal point of vehicular access to Lebanon from the northeast and southwest. State Highway 5 provides access from both the north and south while State Highway 32 provides access from the east and west.

The U.S. Census Bureau estimated Laclede County's July 2022 population at 36,313 residents. The county housing stock totals 16,026 dwelling units, of which 69.9 percent are owner-occupied. The median housing value in Laclede County is \$121,400.

Established in the early 1900s to bring commercial activity closer to the railroad, Downtown Lebanon offers a variety of unique shops, restaurants, financial institutions, and historical buildings. Commercial Street serves as downtown's principal street housing 1- to 3-story commercial buildings. In 1976, the merchants of Downtown Lebanon came together and formed the Lebanon Downtown Business District. The District serves to promote businesses and events, provide, and maintain landscaping, coordinate closing streets and the use of sidewalk space within the District, and more. As part of the Missouri DREAM Initiative, the Downtown Business District completed a series of plans and studies culminating in the adoption in 2015 of the Downtown Strategic Plan.

Lebanon's principal commercial corridors include Commercial Street, Jefferson Avenue, and Elm Street/Route 66. Industrial development is located predominantly along the Interstate 44 and railroad corridors. The Lebanon Airport is located at the southeast quadrant of the city with Mercy Hospital at the northeast quadrant.

## City of Lebanon, Missouri Zoning Map



## Lebanon, Laclede County, and Missouri Demographic Trends

Demographic Characteristic	City of Lebanon	Laclede County	State of Missouri
<b>Population</b>			
2000 Census	12,155	32,513	5,595,211
2010 Census	14,474	35,571	5,988,927
2020 Census	15,013	36,039	6,268,203
2028 Forecast	15,353	36,251	6,407,412
<b>Households by Type (2023)</b>			
Total Households	6,264	14,467	2,375,611
Family Households	63.5%	70.3%	65.3%
Married Couple Family	44.7%	55.2%	48.4%
With Own Children	19.4%	22.3%	20.7%
Nonfamily Households	5.5%	4.9%	6.4%
Householder Living Alone	31.1%	24.8%	28.3%
All Households with Children	34.0%	33.6%	31.8%
<b>Distribution of Population by Age (2023)</b>	<b>15,282</b>	<b>36,214</b>	
0-14 Years	22.1%	19.2%	19.6%
15-24 Years	11.8%	10.9%	14.0%
25-34 Years	12.9%	12.2%	12.9%
35-44 Years	12.9%	12.5%	12.5%
45-64 Years	22.0%	25.1%	26.9%
65+ Years	18.3%	20.0%	14.0%
<b>Distribution in Household Income (2023)</b>	<b>6,264</b>	<b>14,467</b>	
Less than \$15,000	17.5%	12.6%	11.0%
\$15,000 - \$24,999	10.7%	8.9%	9.9%
\$25,000 - \$34,999	15.5%	14.9%	10.3%
\$35,000 - \$49,999	12.3%	13.6%	14.2%
\$50,000 - \$74,999	19.4%	20.3%	18.5%
\$75,000 - \$99,999	13.8%	12.4%	12.5%
\$100,000 - \$149,999	6.7%	10.9%	13.5%
\$150,000 - \$199,999	2.4%	3.7%	5.0%
\$200,000+	1.7%	2.8%	5.2%
Median Household Income	\$41,614	\$50,024	\$54,596
<b>Educational Attainment for Residents 25+ Years (2023)</b>			
Total Population 25+	10,109	25,291	4,329,896
Less than 9th Grade	2.7%	2.8%	2.7%
9th - 12th Grade, No Diploma	9.8%	8.7%	6.4%
High School Graduate	34.5%	37.2%	25.6%
GED/Alternative Credential	7.9%	7.2%	4.5%
Some College, No Degree	18.2%	17.9%	22.5%
Associate Degree	9.6%	8.2%	8.3%
Bachelor's Degree	12.2%	12.5%	18.2%
Graduate/Professional Degree	5.0%	5.5%	11.8%

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

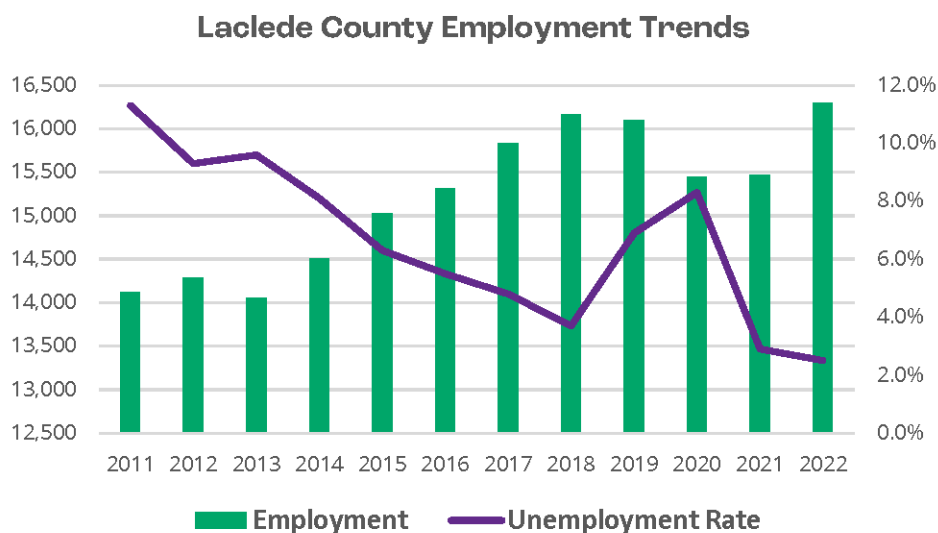
## ECONOMIC AND DEMOGRAPHIC ANALYSIS

This section of the report examines the economic and demographic factors impacting real estate development patterns in the City of Lebanon. Past demographic trends were provided by the U.S. Census Bureau with 2023 estimates and 2028 forecasts provided by Esri Business Analyst, an international supplier of geographic information systems and data. Quantifying Lebanon's economic and demographic characteristics will assist in forecasting the future need for residential housing units and commercial and industrial space.

### Employment Trends

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

The City of Lebanon is in Laclede County. According to the U.S. Bureau of Labor Statistics, coming out of the Great Recession employment in Laclede County grew at a modest rate from 14,122 jobs in 2011 to a peak in 2018 at 16,165 jobs and an unemployment rate of 3.7 percent. The COVID-19 pandemic reversed the decade long employment growth with the loss of 651 jobs in 2020, pushing the unemployment rate to 8.3 percent. Through September 2023, Laclede County added 1,270 jobs (for a total of 16,723 jobs) and the unemployment rate stood at 2.7 percent. According to Esri Business Analyst, employment in Lebanon totals 13,611 jobs, accounting for 81.4 percent of all jobs in Laclede County.



From 2010 to 2017, the unemployment rate for Laclede County trended higher than both the statewide and national averages. By 2018, the Laclede County unemployment rate performed at or near the levels of both Missouri and the United States. The pandemic inflated the County's unemployment rate to 8.3 percent in 2020, compared to 4.4 percent for Missouri and 6.7 percent for the nation. By December 2022, the Laclede County unemployment rate improved to 2.5 percent,

slightly higher than the statewide average and favorable to the statewide rate of 2.7 percent and the national rate of 3.5 percent.

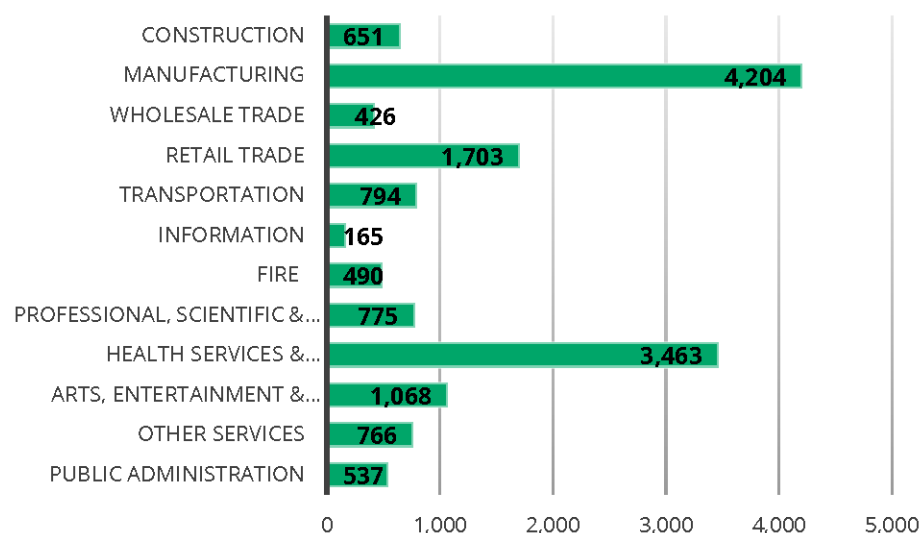
### Unemployment Rate Comparison

Year	Laclede County	State of Missouri	United States
2010	12.4%	9.4%	9.3%
2011	11.3%	7.8%	8.5%
2012	9.3%	7.0%	7.9%
2013	9.6%	6.6%	6.7%
2014	8.1%	5.7%	5.6%
2015	6.3%	4.5%	5.0%
2016	5.5%	4.3%	4.7%
2017	4.8%	3.5%	4.1%
2018	3.7%	3.2%	3.9%
2019	6.9%	3.5%	3.6%
2020	8.3%	4.4%	6.7%
2021	2.9%	3.9%	3.9%
2022	2.5%	2.7%	3.5%

Source: U.S. Bureau of Labor Statistics.

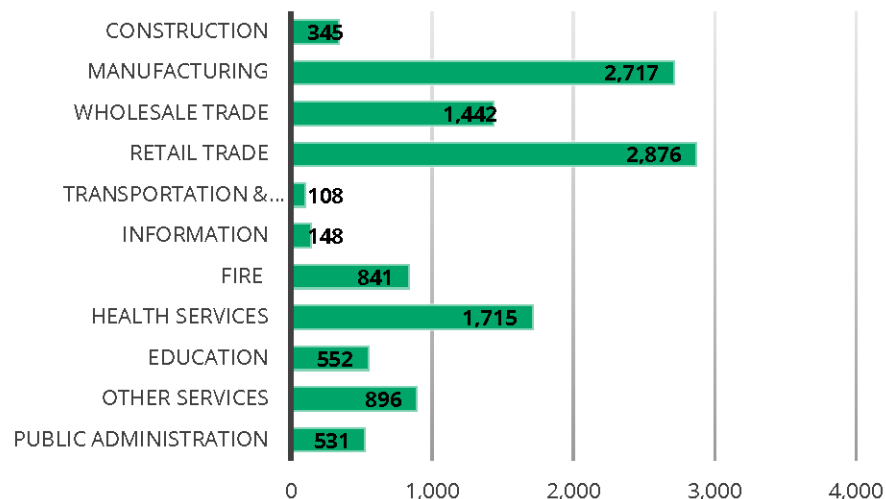
According to the U.S. Census Bureau, leading employment sectors in Laclede County include: 1) manufacturing, 2) healthcare and education, 3) retail, 4) arts, entertainment, and accommodations, and 4) transportation. Healthcare employment in Laclede County is fueled by the presence of Mercy Hospital Lebanon, a 58-bed acute care facility.

### Laclede County, Missouri Employment by Sector



Lebanon is Laclede County's principal economic center. According to Esri Business Analyst, Lebanon supports 13,611 jobs, equating to 81.4 percent of the county total. Lebanon's economy is led by the retail trade, manufacturing, healthcare services, and wholesale trade sectors. Industrial-related jobs account for 31.3 percent of Lebanon's total employment, compared to 28.1 percent statewide. Healthcare accounts for 12.6 percent of total employment in Lebanon while retail trade accounts for 21.1 percent. These employment sectors generate the need for a wide range of owner-occupied and rental housing types and price points (i.e., sales price and rent).

### Lebanon, Missouri Employment by Sector



Several large manufacturers operate facilities in Lebanon, with the largest employers listed in the table below.

### Lebanon, Missouri Major Employers

Employer	Type of Business	# of Jobs
Tracker Marine	Boat Manufacturer	1,200
Emerson Climate Technologies	Compressors for HVAC Industry	900
Lebanon R-III School District	Education	667
Mercy Hospital	Healthcare	661
Missouri Cooperage	Barrel Manufacturer	570
The Durham Company	Electrical Component Manufacturer	380
G-3 Boats	Boat Manufacturer	350
Lowe Boats	Boat Manufacturer	325
Marine Electrical Products	Marine Electrical Components	285
Detroit Toll Metal Products	Metal Fabrication	253
Regal Beloit	Electric Motor Manufacturer	170
DT Engineering	Full-Service Engineering	122

Source: Lebanon-REDI.

Tourism has a significant impact on the Laclede County economy. According to the State of Missouri, during fiscal year 2022, annual visitor spending in Laclede County totaled \$71.5 million, creating 1,281 jobs. A large source of visitors to Laclede County and Lebanon are residents from Missouri, Illinois, Arkansas, Kansas, and Texas. Assets that draw visitors to Laclede County and Lebanon include:

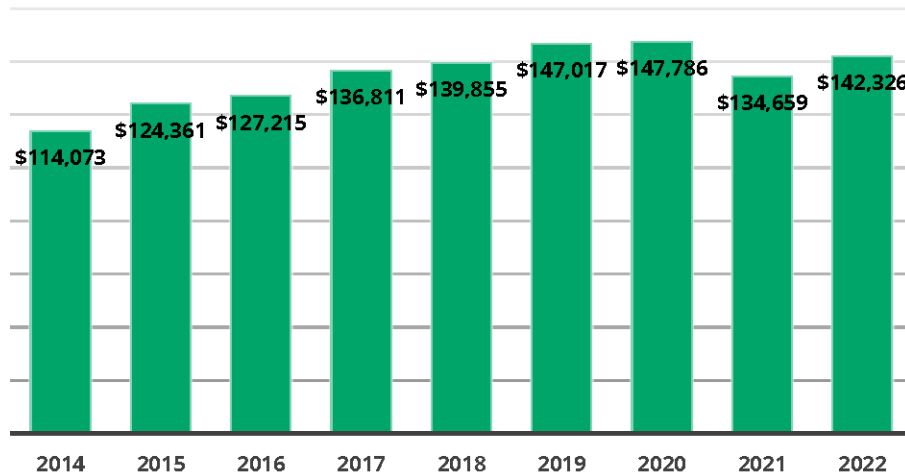
- Route 66 Museum
- Laclede County Fairgrounds
- Ha Ha Tonka State Park
- Bennett Spring State Park
- Pershing State Park
- NRO Zipline
- Lebanon I-44 Speedway
- Ozark Distillery and Brewery
- Locust Creek Covered Bridge
- Boswell Park and Aquatic Center
- Cowan Civic Center
- Fallen Warriors & American Veterans Memorial
- Great Life Golf & Fitness
- Gunter Farms
- Lebanon Art Guild Studio & Gallery

The Cowan Civic Center is a multi-purpose facility which hosts conventions, trade shows, expositions, sporting events, weddings, concerts, theatrical productions, business meetings, and much more. The Civic Center features a 46,000 square foot Exhibition Hall with a seating capacity of 5,000, meeting rooms with a seating capacity of up to 300 people, a foyer, and a 675-seat theater. Use of the Cowan Civic Center has increased in recent years, from 49 events held in 2010 to 66 events during 2022. A total of 72 events are estimated for 2023.

Major events held in Laclede County that draw visitors from out of town include the Laclede County Fair, End of Summer Party, Route 66 Festival, Central Missouri Route 66 Yard Sale, and Cackle Hatchery Annual Chicken Festival,

The Lebanon Tourism Department promotes tourism in Lebanon and operates a website that offers travel information on attractions, events, lodging, shopping, places to dine, and event venues. The department's office is located within the Cowan Civic Center. Market and promotional efforts are funded in part by the City's 2.5 percent lodging tax. After experiencing a downward trend in fiscal year 2021 due to the adverse impact of the COVID-19 pandemic on the tourism industry, during fiscal year 2022 lodging tax revenues rebounded reaching nearly pre-pandemic levels.

### City of Lebanon Lodging Tax Revenues



Lebanon Regional Economic Development Incorporated, (Lebanon-REDI), is a not-for-profit, 501c (6) organization that was formed in 2004 to be the lead economic development agency for Lebanon and Laclede County. Previously known as "America's Heartland Economic Partnership," the organization is funded by the City of Lebanon, Laclede County, and the private sector.

The mission of Lebanon-REDI is "To strengthen the Laclede County economic base and increase the standard of living of all residents through retention, expansion, attraction and development of primary jobs and capital investments." Focus areas for Lebanon-REDI include:

- Business Retention and Expansion
- Business Attraction
- Community Development
- Workforce Development
- Corporate Development

According to the U.S. Census Bureau, labor force participation rate in Laclede County is 60 percent. Labor participation in the Lake of the Ozarks region is below the statewide average. This is not surprising since historically the region has had a large population of retirees.

From 2023 through 2040, job growth in Laclede County is projected to increase at an average annual rate of 0.5 percent to 0.7 percent, yielding an estimated 1,531 to 2,181 new jobs.

Lebanon is Laclede County's principal employment center and through 2040 is estimated to account for 75 percent to 80 percent of the countywide job growth, equating to 1,148 to 1,745 jobs.

## Population Growth Trends

Population growth has a direct impact on the need for housing and retail space. Since 1970, the population for both Laclede County and Lebanon has grown steadily. Laclede County's population grew 78.4 percent from 1970 through 2010, adding 15,627 residents. From 2010 through 2020, population growth moderated to a rate of 1.3 percent, adding just 468 residents. By 2023, Esri estimated the county's population at 36,214 residents.

As the county seat, Lebanon has benefitted from the county's population growth. The city's population increased by 10.3 percent during the 1980's, 5.0 percent during the 1990's, 21.8 percent in the 2000's, and 19.1 percent in the 2010's adding a total of 4,967 residents. From 2010 to 2020, the city's population rose just 3.7 percent, reaching 15,013 residents. By 2023, Esri estimated the city's population at 15,282 residents, accounting for 42.2 percent of the county total.

### Population Growth Trends 1970-2020

Year	Laclede County Population	County Growth Rate	City of Lebanon Population	City of Lebanon Growth Rate	% Share of County
1970	19,944	5.0%	8,616	4.8%	43.2%
1980	24,323	22.0%	9,507	10.3%	39.1%
1990	27,158	11.7%	9,983	5.0%	36.8%
2000	32,513	19.7%	12,155	21.8%	37.4%
2010	35,571	9.4%	14,474	19.1%	40.7%
2020	36,039	1.3%	15,013	3.7%	41.7%
2023	36,214	0.5%	15,282	1.8%	42.2%

Source: U.S. Census and Esri.

A sizable population resides just outside of the Lebanon city limits. Census Tract 9603.1 encompasses land adjacent to the north, east, and south boundaries of Lebanon. According to the U.S. Census Bureau, the 2021 population for Census Tract 9603.1 totaled 3,107 residents. These county residents will have an impact on Lebanon's retail sales, medical services, and labor force.

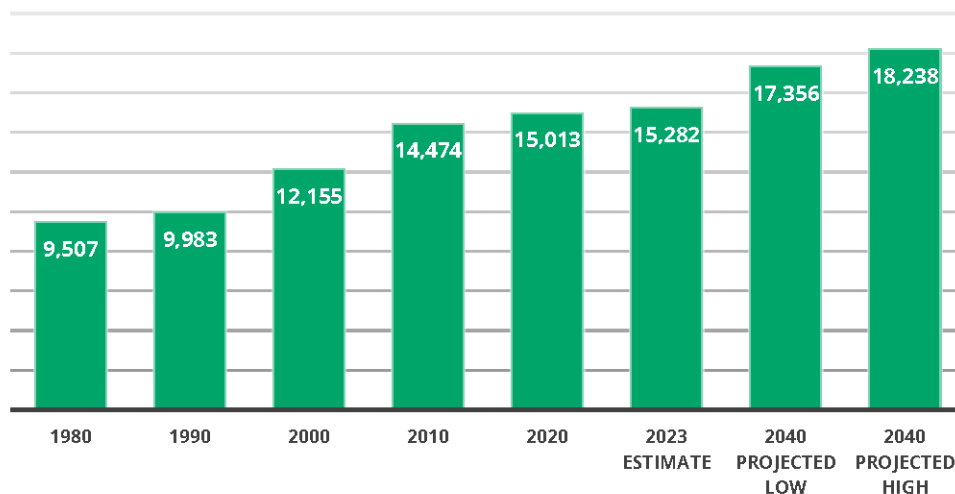
Future population growth within the City of Lebanon was forecast based on such factors as recent new home construction and population trends, employment growth, low cost of living, and the availability of undeveloped land and infrastructure. Lebanon supports 2.33 residents per employed job. By comparison, the State of Missouri supports 2.05 residents per job.

Over the past decade the Laclede County added 1,394 new jobs accounting for an overall growth rate of 9.92 percent. From 2023 to 2040, Laclede County is forecast to support an annualized growth rate of 0.5 percent to 0.7 percent, yielding total employment growth of 1,450 to 2,067 jobs. At the current job to population ratio of 2.2, the county's population is conservatively forecast to increase by 8.8 percent, adding 3,190 new residents. A more optimistic scenario assumes Laclede County's population will grow at a rate of 12.6 percent, yielding an increase in population through 2040 of 4,548 residents. **By 2040, Laclede County is forecast to support a population of 39,404 to 40,762 residents.**

**From 2023 through 2040, the City of Lebanon is forecast to gain 1,148 to 1,745 net new jobs.** According to the U.S. Census, Lebanon is an importer of jobs, with 8,816 nonresidents commuting to place of work during 2019.

**Through 2040, Lebanon is estimated to capture 65 percent of the countywide population growth, yielding gains of 2,074 to 2,956 new residents.** By 2040, Lebanon's population is forecast to reach 17,356 to 18,238 residents. In the bar chart below, U.S. Census Bureau and Ersi Business Analyst population estimates are highlighted in "blue" with future conservative and optimistic population projections highlighted in "purple."

**Lebanon, Missouri Population Trends**



The forecast population growth of Lebanon will generate the need for retail goods and services, additional commercial and industrial space, and new residential housing units.

## **Household Composition**

Household formation and the mix of household types have a direct impact on the composition of retail sales and housing needs. According to Esri Business Analyst, as of 2023 an estimated 6,264 households resided in Lebanon with an average household size of 2.38 persons. Family households accounted for 63.5 percent of all households with 34.0 percent of all households having children present. Married couple families accounted for 44.7 percent of all households, of which 19.4 percent had related children.

Over the past six decades the average household size in the United States has declined steadily, from 3.33 persons in 1960 to 2.54 persons by 2021. This declining household size has played a factor in changing housing needs. Lebanon's average household size of 2.38 persons is supported by the below average rate of families and married couples with children and above average rate of householders living alone. The table on the following page provides a comparison of households by type for the City of Lebanon, Census Tract 9603.1, and State of Missouri.

When compared to that of the State of Missouri, Lebanon's household composition possesses below average rates for both of families, married couples, and married couples with children and above average householders living alone and senior households ages 65 years and over living alone.

Census Tract 9603.1 located just outside of Lebanon has 1,153 households consisting predominantly of married couples with children and seniors.

### Comparison of Households by Type City of Lebanon vs. State of Missouri

Household Type	City of Lebanon	Census Tract 9603.1	State of Missouri
Total Households	6,264	1,153	2,375,611
Family Households	63.5%	90.5%	65.3%
Married Couple Households	44.7%	77.6%	48.4%
With Related Children	19.4%	26.8%	20.7%
Other Family (No Spouse Present)	18.8%	9.5%	16.7%
With Children Present	13.7%	5.6%	11.0%
Householder Living Alone	31.1%	9.5%	28.3%
Householder Living Alone 65+ Years Old	14.5%	4.2%	11.9%
All Households with Children	34.0%	38.1%	31.8%
Average Household Size	2.38	2.67	2.44
Average Family Size	3.02	2.78	3.00

Source: Esri Business Analyst.

Family households account for 63.5 percent of all households in Lebanon, compared to 65.3 percent statewide and 90.5 percent for Census Tract 9603.1.

34.0 percent of all Lebanon households have children present, compared to 31.8 percent statewide and 38.1 percent for Census Tract 9603.1.

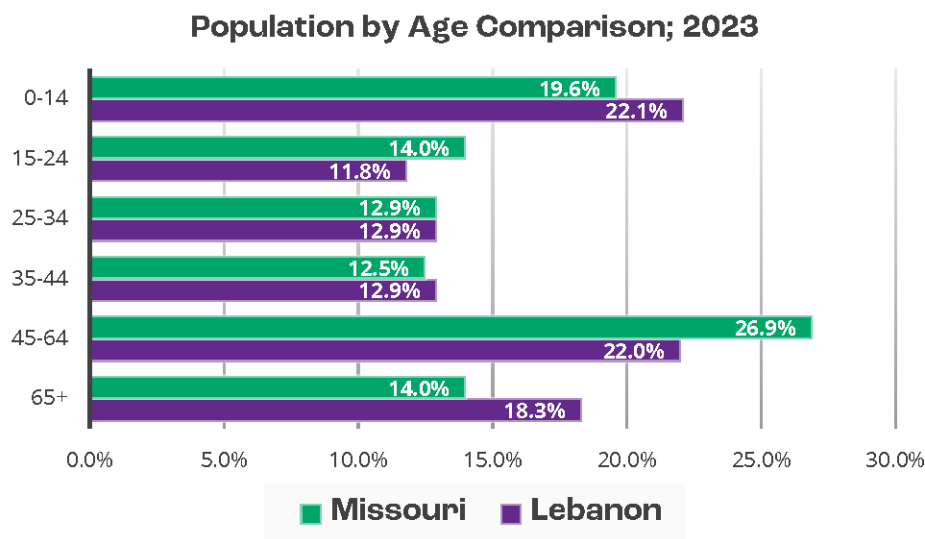
Married couple families account for 44.7 percent of all Lebanon households, of which 19.4 percent have related children at home. Married couples account for 48.4 percent of Missouri families, with 20.7 percent having children present.

An estimated 31.1 percent of Lebanon householders live alone with seniors 65 years and older accounting for 47 percent of the total. By comparison, 28.3 percent of Missouri householders live alone, with seniors accounting for 42 percent. Very few householders and seniors in Census Tract 9603.1 live alone.

## **Population Age Distribution**

Demographic factors are one of the most important factors influencing the behavior of the consumer towards the acquisition of products, whether in terms of the impact of sex on the purchasing decision or the age of the consumer, the level of education and occupation, or consumer income. Age is an important factor in consumer identity and behavior, since consumption patterns, housing needs, and financial situation change significantly throughout an individual's lifetime.

The bar chart below provides a comparison of the Lebanon and Missouri population by six primary age groups, including children (0-14 years), adolescent (15-24 years), young adults (25 to 34 years), family/working adults (35-44 years); empty nesters (45-64 years) and elderly (65+ years). Each age group possesses distinctively different consumption and housing needs.



Children ages 0 to 14 years are not consumers per say, but their presence within a household generates retail expenditures on apparel, accessories, and groceries. Children ages 0 to 14 years comprise Lebanon's largest age group with 22.1 percent of the total population, exceeding the statewide norm of 19.6 percent. Lebanon's large population of children suggests the potential for above average per capita sales on child-related goods and services.

Adolescents ages 15 to 24 support the sales of apparel and accessories, groceries, sporting goods, music, consumer electronics, eating and drinking places, and general merchandise. Adolescents account for 11.8 percent of the Lebanon population and 14.0 percent of the Missouri population.

Young adults aged 25 to 34 years generally are new to the workforce. These tech savvy young adults are heavy consumers of electronics, apparel and accessories, entertainment, and rental housing. Young adults account for 12.9 percent of the Lebanon population and will have a growing impact on the local workforce, retail goods and services, and housing market. Young adults account for 12.9 percent of the Missouri population.

The population ages 35 to 44 are in their child raising and principal consumer years, with expenditures favoring hardware, furniture and home furnishings, consumer electronics, department

stores, and eating and drinking places. Family/working adults account for 12.9 percent of the Lebanon population, compared to 12.5 percent of the statewide population.

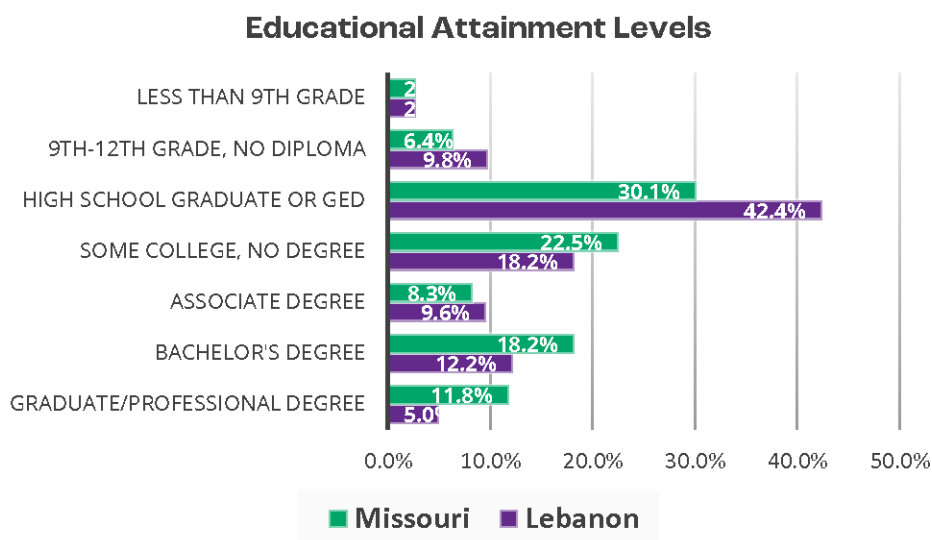
Lebanon's empty nester population ages 45 to 64 years account for 22.0 percent of the total population, compared to 26.9 percent statewide. The empty nester age group provides opportunities for home downsizing, restaurants, entertainment, and travel and will also produce a growing need for healthcare services and continuum care housing facilities.

Residents 65+ years of age account for 18.3 percent of the Lebanon population, which well exceeds the statewide rate of 14.0 percent. Lebanon's large senior population poses a growing market for healthcare goods and services, senior housing, and downsized housing. The senior population will over time have an impact on the future availability of housing in Lebanon.

The age composition of the population residing in Census Tract 9603.1 consists of 30.3 percent ages 45 to 64 years, 20.2 percent ages 0 to 14 years, and 14.5 percent aged 65+ years. Compared to the Lebanon population, Census Tract 9603.1 possesses a higher percentage of adolescent (15-24 years); family/working adults (35-44 years); and empty nesters (45-64 years).

## **Educational Attainment**

Educational attainment levels of a market area's labor pool are becoming increasingly important in the ability to attract and retain knowledge-based industries as well as the ability to support above average wages. The bar chart below provides a comparison of educational attainment levels between Lebanon and State of Missouri.



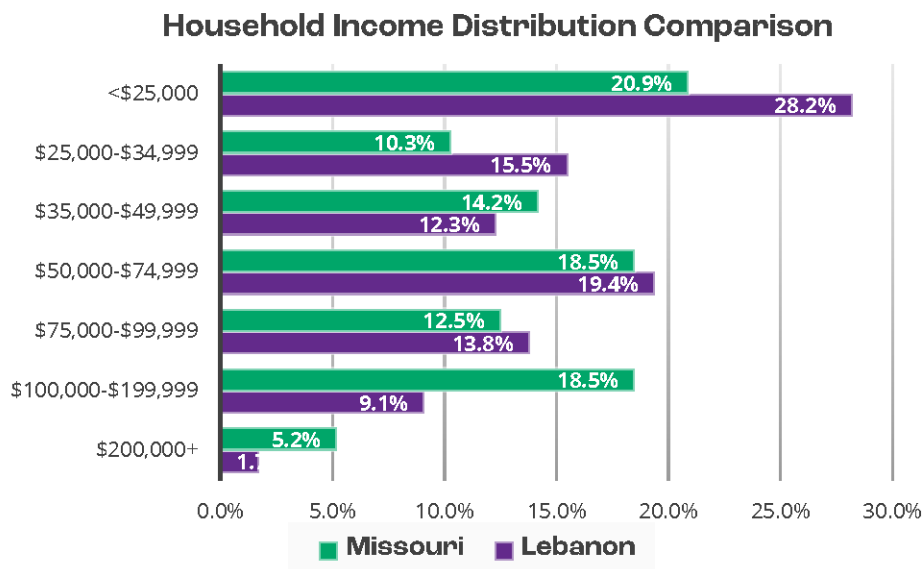
Educational levels have a direct impact on achievable income levels, retail expenditure patterns, housing values, and the demand for commercial space. The need for retail space increases as household income and retail sales levels rise. The type of retail space is also impacted as highly educated households support increased demand for higher valued goods and services. The demand for office space increases at higher educational attainment levels as a larger percentage of residents are more likely to be employed in professional service and medical professions.

The Lebanon population is less educated than the overall Missouri population with 26.8 percent of the population attaining an associate degree or higher compared to 38.3 percent statewide. Conversely, 54.9 percent of Lebanon residents attained a high school diploma or less compared to 39.2 percent of the statewide population.

The population residing within Census Tract 9603.1 is slightly more educated than the overall Lebanon population with 33.9 percent attaining an associate degree or better and 49.8 percent with a high school diploma or less.

## **Household Income Distribution**

Household income levels have a direct impact on retail sales volumes, housing needs, for-sale housing values, and residential rents. A comparison of household income distribution estimates for the City of Lebanon and State of Missouri are outlined in the bar chart below.



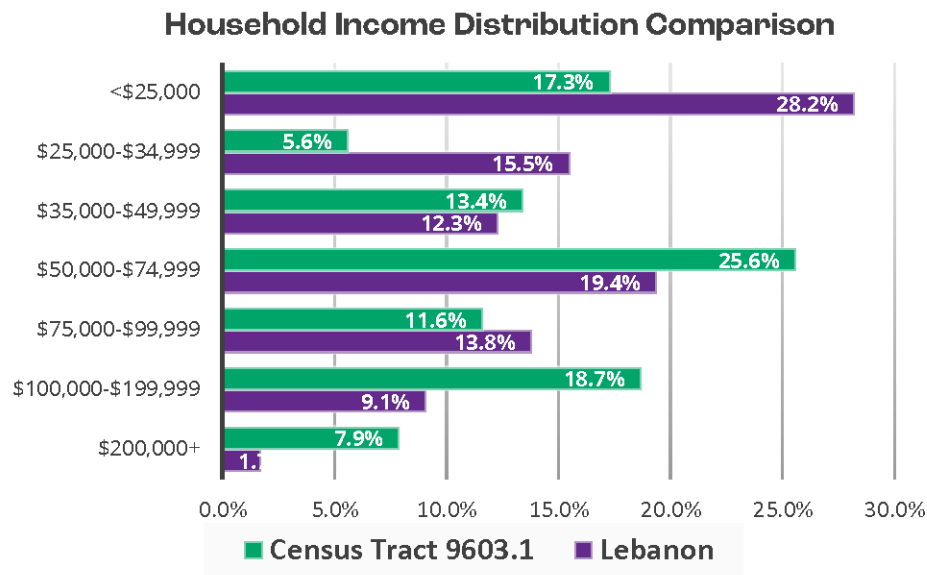
According to Esri Business Analyst, for 2023 Lebanon's median household income of \$41,614 compared to \$54,596 for Missouri, with a much greater rate of households earning less than \$35,000 and a much lower rate of high-income households earning \$100,000 or more. Lebanon's well below household income levels place a constraint on achievable retail sales and rents, housing values, and residential rents. An estimated 28.2 percent of Lebanon households earn less than \$25,000 annually, compared to 20.9 percent statewide, suggesting an above average need for affordable and income-based housing.

An estimated 15.5 percent of Lebanon households earn \$25,000 to \$34,999 annually compared to 10.3 percent statewide. These households tend to be perpetual renters with the lowest income households potentially qualifying for some form of housing assistance. The median housing cost in Lebanon of \$732 per month as reported by the U.S. Census requires annual household incomes within the lower end of the \$25,000 to \$34,999 income range. Housing valued between \$50,000 and \$99,999 accounts for 28.8 percent of the total housing stock. Based on standard lending practices, households earning \$25,000 to \$34,999 can qualify for the entry-level, for-sale housing. Household

income levels suggest that Lebanon supports an above average need for affordable rental and for-sale housing.

Housing valued between \$100,000 and \$199,999 accounts for 24.3 percent of the Lebanon housing stock. Households earning \$35,000 to \$49,999 can qualify for-sale housing priced from \$100,000 to \$199,999. An estimated 12.3 percent of Lebanon households earn \$35,000 to \$49,999, compared to 14.2 percent statewide.

High-income households with annual incomes of \$100,000 or more account for just 10.8 percent of Lebanon households compared to 23.7 percent for Missouri. These households represent potential demand for housing priced at more than \$400,000, luxury automobiles, retail goods and services, travel, and entertainment.



The median household income of \$62,896 for Census Tract 9603.1 significantly exceeds that for Lebanon with 26.6 percent of households earning \$100,000 or more and just 17.3 percent earning under \$25,000. The higher income levels support higher housing values outside of the city limits and increased retail sales which Lebanon businesses can capture.

## **Economic Development Factors**

The assets/opportunities and constraints/limitations in fostering economic development in both Laclede County and City of Lebanon are summarized in the bullet points below.

### **Assets / Opportunities**

- Three Interstate 44 interchanges serve Lebanon, providing direct access to the St. Louis MSA to the northeast and the metropolitan areas of Springfield and Tulsa to the southwest,
- Lebanon's employment base and population continue to grow,
- Land serviced with infrastructure is available for future retail, office, industrial, and residential development,
- Lebanon's for-sale housing stock offers a wide range of price points,
- Lebanon is a regional center for commerce, shopping, recreation, and entertainment. The City's retail sales tax revenues have increased from \$3.5 million in fiscal year 2017 to \$4.5 million by fiscal year 2022,
- Lebanon possesses access to interstate highways, rail, and an airport,
- Excellent access and availability of healthcare services,
- Laclede County supports a large existing industrial base with manufacturing the leading employer. Healthcare and retail sectors posed for future job growth,
- Downtown Lebanon is a strong central business district featuring restaurants, hair salons, boutique shops, financial services, personal services, and historical buildings,
- The Kenneth E. Cowan Civic Center is a multipurpose facility which accommodates conventions, trade shows, expositions, sporting events, weddings, theatrical productions, business meetings, and more,
- Laclede County supports a strong tourism industry with visitor expenditures of \$71.5 million in fiscal year 2022,
- The Lebanon Regional Economic Development Incorporated ("Lebanon-REDI") mission is to strengthen the Laclede County economic base through retention, expansion, attraction and development of primary jobs and capital investments,
- Competitive economic incentive program to attract companies to Lebanon. Lebanon-REDI works with the City of Lebanon and state partners on incentive opportunities on a case-by-case needs basis.
- Higher education programs offered by Ozarks Technical Community College and Missouri

State University ("MSU"), and

- The City of Lebanon possesses a large inventory of vacant land available for future development. The large inventory of vacant land affords the opportunity to implement creative land use planning focusing on economic development, diverse housing, and connected, walkable neighborhoods.

### Constraints / Limitations

- Laclede County's current low unemployment rate creates workforce challenges,
- Limited availability of vacant retail, office, and industrial space available for immediate occupancy,
- Laclede County's population is less educated than the statewide norms,
- Rural location places constraints on available construction labor and increases costs,
- Lebanon's housing stock is not diverse with detached single-family homes accounting for 65 percent of the total inventory and large-scale apartments with just an 8.8 percent share. The bulk of for-sale housing is valued between \$100,000 and \$199,999 with very little inventory valued at \$400,000 or more.

Lebanon possesses ample advantages for attracting businesses, jobs, and development activity. The principal economic development advantages lie with a growth population, large industrial base, strong tourism market, Interstate 44 access, availability of land for future development. Challenges facing future economic development in Lebanon include a low unemployment rate that places constraints on the available labor force; lack of diverse housing stock; and limited availability of vacant retail, office, and industrial space available for immediate occupancy.

## MARKET ANALYSIS

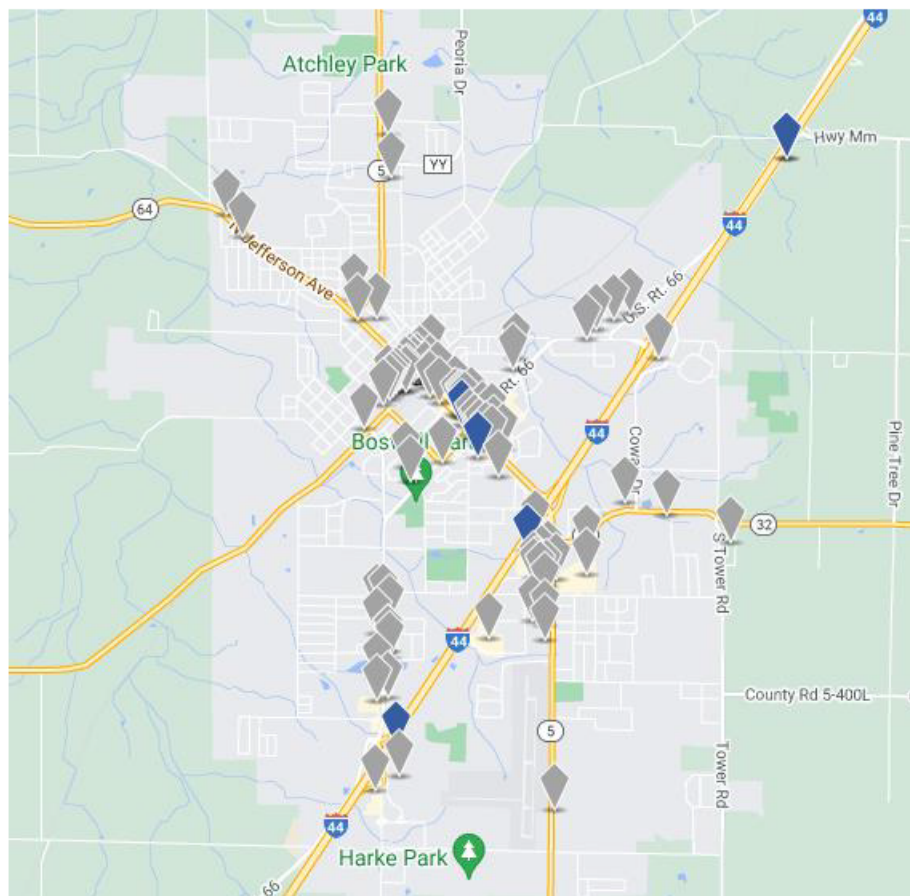
The *Market Analysis* portion of the study evaluated directly competitive retail, office, industrial, and housing market trends impacting Lebanon, Missouri. The market trends for each land use were evaluated and the long-term need for additional commercial space, industrial space, and housing units was forecast to quantify the level of future real estate development in Lebanon.

### **Retail Market Analysis**

The *Retail Market Analysis* portion of the report evaluates directly competitive retail market trends impacting Lebanon and forecasts future need for commercial space.

### **Retail Market Overview**

CoStar, a national real estate market research company, provided historical and current retail market trends in Lebanon, Missouri. The Costar database was searched for existing shopping centers and retail buildings. Bank branches, convenience stores, automotive, car wash, and fast food and sit-down restaurants were excluded from the retail survey. The map below depicts the location of each surveyed shopping center and retail building in Lebanon.



As the largest city in Laclede County, Lebanon serves as the county's principal shopping destination. A total of 92 properties were identified in Lebanon totaling 1.5 million square feet of commercial space. Downtown Lebanon along Commercial Street served as the city's original business district supporting a large retail presence. The Jefferson Avenue corridor has emerged as the predominant retail destination with concentrations of businesses both north and south of the Interstate 44 interchange. Elm Street/Route 66 also serves as a commercial corridor. The table below summarizes retail market trends in Lebanon since 2010.

### Lebanon, Missouri Retail Market Trends

Year	# of Properties	Inventory Sq. Ft.	Vacant Space	Vacancy Rate	Net Absorption
2010	86	1,425,635	36,195	2.5%	0
2011	86	1,425,635	36,995	2.6%	-800
2012	88	1,444,357	50,525	3.5%	5,192
2013	88	1,444,357	49,601	3.4%	924
2014	88	1,444,357	77,982	5.4%	-28,381
2015	89	1,453,563	79,587	5.5%	7,601
2016	89	1,453,563	57,215	3.9%	22,372
2017	90	1,462,668	58,019	4.0%	8,301
2018	91	1,465,668	185,546	12.7%	-124,527
2019	91	1,465,668	80,918	5.5%	104,628
2020	91	1,465,668	82,110	5.6%	-1,192
2021	91	1,465,668	58,124	4.0%	23,986
2022	92	1,467,935	93,141	6.3%	-32,750
2023 Q3	92	1,467,935	57,425	3.9%	35,716

Source: CoStar.

Downtown Lebanon encompasses a 6-block area along Commercial Street from Van Buren Avenue north to Washington Avenue. Downtown Lebanon maintains approximately 380,000 square feet of ground floor commercial space occupied by a variety of boutique shops, restaurants, hair salons, financial institutions, and historical buildings. Public buildings downtown include Lebanon City Hall, Laclede County Courthouse, and U.S. Post Office. A permanent farmers market with a large canopy area is located on the north side of Jefferson Avenue just east of Commercial Street. Streetscape improvements include arched entry features at Commercial Street and Jefferson Avenue, historic streetlights with banners, street furniture, planters, and trash cans.

Downtown's assets as a business center and location for redevelopment activity include the presence of an organization to market and promote downtown, presence of new energetic business owners, beautification efforts, and the recent opening of a brewery and pending opening of a coffee house. Limitations and constraints hampering downtown include needed reinvestment of several buildings and Commercial Street is not a major arterial street.

The Lebanon Downtown Business District serves to promote businesses and events, install and maintain landscaping, and coordinate closing streets and the use of sidewalk space within the District.

A pocket park is planned for an empty lot on the south side of Madison Street, one-half block west of Commercial Street. The land was donated by a bank and design work on the park is underway. Potential park features include seating areas and a stage for musical and theatrical performances.

Downtown was surveyed to identify the mix of businesses. A total of 82 businesses were identified, with 22 businesses north of Jefferson Avenue and 62 businesses to the south. The business mix includes 53 retailers and 29 office tenants. Prominent retail businesses include hair salons and barbers, restaurants, boutiques and clothing stores, photo studios, dance studios. Office tenants include law firms, insurance agents, financial planners, banks, accountants, title companies, tax preparers, bail bonds, and surveyors. The Boat Town Brewing recently opened and Jude's Coffee will soon follow, both of which should generate additional foot traffic.

A commercial corridor exists along Jefferson Avenue from the Interstate 44 interchange west to 7<sup>th</sup> Street, housing several strip centers and such businesses as Walgreens, Aldi, King Cash Saver, Price Chopper Plus, True Value, Applebee's, and several bank branches and fast-food restaurants.

A new retail hub has emerged along Jefferson Avenue from Interstate 44 south to Bland Road featuring the 131,127 square foot Lebanon Marketplace anchored by Big Lots, Tractor Supply, Harbor Freight, Ashley Outlet, Shoe Sensation, Napa, and Petsense. Two outparcels of 87,120 square feet and 27,000 square feet of land are available for lease and development. Other notable retailers operating along the south Jefferson Avenue corridor include Lowe's, Walmart, Hibbett Sport, Factory Connection, Cato, and Dollar Tree.

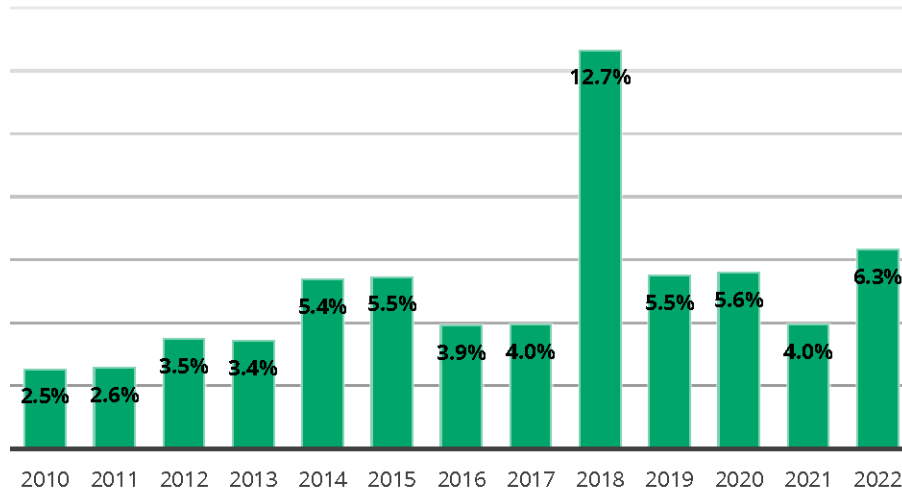
Despite serving as Laclede County's principal shopping destination, Lebanon's retail market is narrow and shallow, lacking in such areas as men's clothing, high-end grocery, sit-down restaurants, and entertainment. Residents must travel outside of Lebanon to satisfy many of their shopping needs and commonly travel within a one-hour drive to such retail destinations as Lake of the Ozarks and Springfield.

As of year-end 2022, the inventory of surveyed retail space in Lebanon was operating at a healthy vacancy rate of 6.3 percent. Since 2019, Lebanon's retail space inventory has operated at a vacancy rate well below market equilibrium with the shortage of retail space available for immediate occupancy a constraint for attracting new businesses to Lebanon.

During 2020, the COVID 19 pandemic adversely impacted the retail industry with negative absorption of 1,192 square of retail space reported. Retail space absorption rebounded in 2021 with 23,986 square feet on net new occupied space. Negative space absorption returned amounting to - 32,750 square feet in 2022. Through the third quarter of 2023, Lebanon supported the absorption of 35,716 square feet of retail space. By the third quarter 2023, no new retail space was under construction in Lebanon.

From 2010 through 2017 the Lebanon retail market operated at vacancy levels below market equilibrium, ranging from a low of 2.5 percent in 2010 to a high of 5.5 percent in 2015. During 2016, the overall vacancy rate jumped to 12.7 percent stemming from negative absorption of 124,527 square feet of space. From 2019 through 2022, in response to accelerated space absorption and modest additions to supply, Lebanon's retail market recovered with annual vacancy rates ranged from just 4.0 percent to 6.3 percent. By the third quarter 2023, Lebanon's retail vacancy rate improved to 3.9 percent.

### Lebanon, Missouri Retail Vacancy Rate Trends



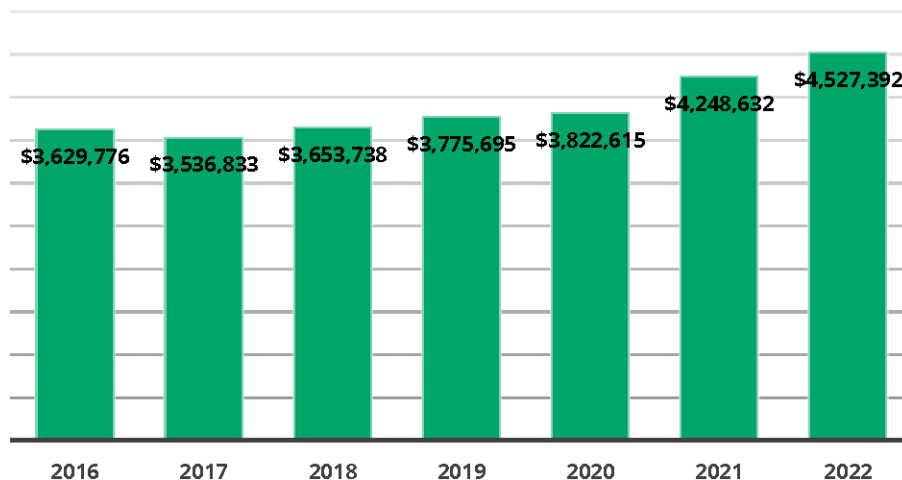
Over the past three years eleven retail properties totaling 100,106 square feet of building area sold in Lebanon.

### Retail Sales Trends

The City of Lebanon levies a 1.0 percent sales tax on the receipts from the sale of retail tangible personal property or services. The bar chart below illustrates fiscal year City sales tax collections from FY 2016 through FY 2022.

As the data indicates, despite the adverse impact the COVID-19 pandemic had on the nation's retail industry starting in early 2020, the City of Lebanon did not experience a decline in retail sales tax collections. City retail sales tax collections rose 1.24 percent during FY 2020, 11.1 percent in FY 2021, and 6.6 percent in FY 2022. The continued strength of the Lebanon retail market can be attributed to its status as a retail destination for Laclede County and the positive impact of tourism in the region.

### City of Lebanon Fiscal Year Sales Tax Revenue



## **Trade Area Capture**

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

TAC = Community's Actual Retail Sales

State Per Capita Sales X Community's Per Capita Income/State Per Capita Income

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

For 2023, Esri Business Analyst estimated the City of Lebanon population at 15,282 residents and per capita income at \$24,073. The City of Lebanon 2024 Budget reported General Fund sales tax collections for FY 2022 of \$4,527,392. At a General Fund City tax rate of 1.0 percent, taxable retail sales are estimated at \$452.7 million.

Esri Business Analyst estimated the population for Missouri at 6,268,203 residents and per capita income of \$30,929. Based on FY 2022 state sales tax collections reported by the Missouri Department of Revenue, the state's per capita retail sales amount to \$14,495.

$$\text{Trade Area Capture} = \frac{\$452,739,200}{\$14,495 \times (\$24,073 / \$30,929)} = 40,130 \text{ Residents}$$

Lebanon's 2022 population of 15,282 residents and estimated TAC of 40,130 people illustrates the City's status as the retail shopping destination for Laclede County's population of 36,214 residents as well as the impact of tourism on the regional economy.

## **Retail Pull Factor**

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

Dividing Lebanon's TAC of 40,130 residents by the city's population of 15,282 residents yields a pull factor of 2.63, indicating the city captures retail sales at a rate 163 percent above the statewide average. Lebanon's above average pull factor suggests it captures retail sales from people residing outside of the city.

## **Forecast Retail Space Need**

As of year-end 2022, Lebanon's inventory of 1.5 million square feet of retail space was operating at an overall vacancy rate of 6.3 percent. Market equilibrium is generally considered to be at a vacancy rate of 7.0 percent or below. This section of the study provides conservative and optimistic retail space need estimates from 2023 to 2040 for the City of Lebanon.

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

The City of Lebanon's 2023 population is estimated at 15,282 residents with the per capita income estimated at \$24,073, yielding total personal income of approximately \$368 million. Based on the *U.S. Census Bureau Annual Retail Trade Survey* and Lebanon's per capita income and retail sales levels, retail goods and services sales equate to a spending rate equivalent to approximately 40 percent of total personal income. The City's current income adjusted retail pull factor is 2.63. Fiscal year 2022 retail sales in Lebanon of \$452.7 million and occupied retail space of 1,374,794 equates to average sales of \$329 per square foot.

By 2040, Lebanon's population is forecast to increase by 2,074 to 2,956 new residents. For this analysis per capita income, average retail sales per square foot, and pull factor remained constant.

Under the conservative scenario, by 2040, Lebanon is forecast to capture new retail and services sales of \$52.5 million, supporting an estimated 159,646 square feet of occupied retail space.

The optimistic scenario assumes stronger population growth will yield increased retail space need. By 2040, Lebanon is forecast to capture new retail goods and services sales of \$74.9 million and 227,538 square feet of new occupied retail space.

### **Forecast Retail Space Need from Population Growth Lebanon, Missouri; 2023 – 2040**

<b>Retail Sales Formula</b>	<b>Conservative Scenario</b>	<b>Optimistic Scenario</b>
Residential Population Growth (2023-2040)	2,074	2,956
Per Capita Income	\$24,073	\$24,073
Total Gross Personal Income	\$49,927,402	\$71,159,788
% Income Spent on Retail Goods and Services	0.40	0.40
Supportable Goods and Services by City Residents	\$19,970,961	\$28,463,915
City of Lebanon Pull Factor	2.63	2.63
Total Supportable Retail Goods & Services Sales	\$52,523,627	\$74,860,097
Average Retail Sales Per Sq. Ft.	\$329	\$329
<b>Retail Space Need 2023-2040 (Sq. Ft.)</b>	<b>159,646</b>	<b>227,539</b>

Source: Canyon Research Southwest, Inc.; November 2023.

Accounting for the current inventory of vacant commercial space in Lebanon and a market equilibrium vacancy rate of 7.0 percent, through 2040 the city is estimated to support the need for approximately 182,000 to 255,000 square feet of new retail space. Based on an average floor-area-ratio of 20 percent to 23 percent, the forecast retail space need through 2040 would absorb an estimated 18 to 21 acres of commercial land under the conservative scenario and 26 acres to 29 acres under the optimistic scenario.

### **Supportable Retail Space New Estimates Lebanon, Missouri; 2023 – 2040**

<b>Lebanon New Retail Space Estimates 2023-2040</b>	<b>Conservative Scenario</b>	<b>Optimistic Scenario</b>
<b>Supportable New Retail Space Need</b>		
Lebanon Inventory of Occupied Retail Space 2022 Q4	1,374,794	1,374,794
Forecast Retail Space Need 2023-2040	159,646	227,538
Total Occupied Retail Space Inventory 2040	1,534,440	1,602,332
Market Equilibrium Retail Space Need (7% Vacancy Rate)	1,649,936	1,722,938
Less: Existing Inventory of Retail Space 2022 Q4	1,467,935	1,467,935
Supportable New Retail Space 2023-2040	182,001	255,003
<b>Supportable Development Acres</b>		
20% FAR	20.9	29.3
23% FAR	18.2	25.5

Source: Canyon Research Southwest, Inc.; November 2023.

## **Retail Site Evaluation**

Retail developers and retailers evaluate potential retail locations based on a series of site-specific criteria. Common selection criteria when evaluating prospective retail locations include parcel size, visibility and exposure, accessibility, traffic counts, and direct competition. Using the site selection criteria summarized below, the Planning Area was evaluated for the potential to support future retail development.

### **Parcel Size**

The U.S. Shopping Center Classification and Characteristics published by the International Council of Shopping Centers quantifies the site characteristics for a wide range of shopping center types. Characteristics for principal shopping center types are summarized in the table on the following page.

## Shopping Center Classifications and Characteristics

Shopping Center Type	Concept	GLA Range Sq. Ft.	Acres	Trade Area
Power Center	Anchored by category-killers such as home improvement, discount department stores, and, warehouse clubs, with only a few small tenants	250,000 - 600,000	25 to 80	5 to 10 Miles
Community Center	Anchored by discount stores and supermarkets offering a wide range of apparel and other soft goods.	125,000 - 400,000	10 to 40	4 to 6 Miles
Neighborhood Center	Convenience oriented anchored by a grocery store.	30,000 - 125,000	5 to 15	3 Miles
Strip Center	Attached row of stores or service outlets with on-site parking. A strip center is the smallest center type whose tenants provide a narrow mix of goods and personal services to a limited trade area.	<30,000	<3	< 1 Mile
Lifestyle Center	Upscale national-chain specialty stores with dining and entertainment,	150,000 - 500,000	10 to 40	8 to 12 Miles

Source: International Council of Shopping Centers.

### Visibility

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

### Accessibility

Community, neighborhood, and strip center development sites rely on an efficient local transportation network that typically includes a mix of major and minor arterial streets. Location at a signalized intersection improves a prospective site's access and exposure. Lifestyle and power centers support larger geographic trade areas and require regional access provided by freeways and highways.

### Traffic Counts

The vehicular traffic counts on arterial streets that flow past the site are important when evaluating a potential retail development site. Arterial streets with the highest traffic counts in the trade area can be the most attractive to retailers by providing excellent exposure and potential customers.

### Competition

Concentrations of retail businesses in Lebanon include downtown and the Jefferson Avenue corridor. The intersection of Interstate 44 and Jefferson Avenue serves as the city's dominant retail location consisting of the Lebanon Marketplace and such national retailers as Walmart, Lowe's, Hibbett Sports, Big Lots, Harbor Freight, Ashley Outlet, and Tractor Supply. The table below identifies major anchors, junior anchors, grocery stores, drug stores, and national chain restaurants currently operating in Lebanon, Missouri.

**Lebanon, Missouri National Retailers**

Major Anchors	Junior Anchors	Grocery and Drug Stores	Restaurants
Walmart Supercenter	Big Lots	Aldi	Applebee's
Lowe's	Hibbett Sports	Smitty's	Denny's
	Harbor Freight	Walgreens	Steak 'n Shake
	Tractor Supply		Waffle House
	Ashley Outlet		Arby's
	Shoe Sensation		Burger King
	Petsense		Dairy Queen
	Dollar Tree		KFC
	Dollar General		McDonalds
			Sonic
			Taco Bell
			Wendy's

### Trade Area Demographics

Trade area population growth and household income levels have a direct impact on supportable retail expenditures. Lebanon serves as Laclede County's principal shopping destination, supporting a large concentration of national retailers.

Ersi Business Analyst estimated Laclede County's current population at 36,214 residents and a per capita income of \$27,352, yielding total wage income of \$990.5 million. High-income households earning \$100,000 or more account for 17.4 percent of all households. The median age of Laclede County residents is 41.1 years, with children (0-14 years) and adolescents (15-24 years) accounting for 19.2 percent and 10.9 percent of the total population.

Lebanon retail businesses benefit from these trade area demographic characteristics which are sufficient to support a sizeable retail market.

Commercial Street, Jefferson Avenue, and Elm Street/U.S. Route 66 serve as Lebanon's principal retail corridors. Locations along these existing commercial corridors were evaluated for the potential to support future retail uses and new development.

### Commercial Street

Downtown Lebanon encompasses a 6-block area along Commercial Street from Van Buren Avenue north to Washington Avenue. Downtown Lebanon consists of approximately 380,000 square feet of ground floor commercial space occupied by a variety of unique shops, restaurants, financial institutions, and historical buildings.

Commercial Street is designated as a major arterial street. Major arterial streets interconnect with, augment, and feed the primary arterial system and are intended for: (a) moderate volume, moderate speed traffic and (b) short to moderate trip lengths.

Commercial Street is improved with two lanes of traffic, diagonal street parking, sidewalks, overhead streetlights, landscaped bump outs, overhead entry signage at Jefferson Avenue, and a traffic signal at Jefferson Avenue. Four-way stops along Commercial Street exist at Jackson Avenue, Monroe Street, Madison Avenue, and Adams Avenue.

According to Missouri Department of Transportation, the 2022 average daily traffic counts on Commercial Street in downtown Lebanon were reported at 1,038 to 2,583 vehicles south of Jefferson Avenue and 608 vehicles north of Jefferson Avenue.

Based on standard site selection criteria, these locations within the Commercial Street corridor are ideal for future retail development, offering excellent access, visibility, and exposure. These prospective redevelopment sites consist of underutilized properties that can support more intensive development.

1. Northeast corner of Commercial Street and Van Buren
2. Northwest corner of Commercial Street and Van Buren
3. Freestanding building at southeast corner of Commercial Street and Jackson Avenue
4. One-story commercial at southeast corner of Commercial Street and Jefferson Avenue
5. Three-story building at the northeast corner of Commercial Street and Adams Avenue
6. Freestanding building at the southwest corner of Commercial Street and Washington

### Jefferson Avenue

Jefferson Avenue is a principal arterial street maintained by MoDOT. Principal arterial streets are primarily intended to provide for: (a) high volume, moderate speed traffic; (b) moderate to extended trip length; and (c) traffic movement between major activity centers.

A commercial corridor exists along Jefferson Avenue from Commercial Street east to the Interstate 44 interchange, housing several strip centers and such businesses as Walgreens, Aldi, True Value, Applebee's, and several bank branches and fast-food restaurants.

Jefferson Avenue west of Interstate 44 is improved with four lanes of traffic, left turn lane, curb, sidewalks, overhead lighting, and a 35 mile per hour speed limit. Traffic signal-controlled intersections are present at Vance Road, Elm Street, Hayes Street, Commercial Street, 2<sup>nd</sup> Street, 4<sup>th</sup> Street, and 7<sup>th</sup> Street.

According to Missouri Department of Transportation, the 2022 average daily traffic counts were reported at 21,446 vehicles on Jefferson Avenue from Interstate 44 west to Elm Street, 14,129 vehicles between Elm Street and Commercial Street, and 19,633 vehicles from Commercial Street and 7<sup>th</sup> Street.

Given the nearly built-out condition of the Jefferson Avenue corridor west of Interstate 44 potential retail development will consist of the infill of under-utilized properties. Potential redevelopment formats include freestanding buildings and strip centers.

A new retail hub has emerged along Jefferson Avenue from Interstate 44 south to Bland Road. This retail node is highlighted by Walmart Supercenter, Lowe's, and the 131,127 square foot Lebanon Marketplace anchored by Big Lots, Tractor Supply, Harbor Freight, Ashley Outlet, Shoe Sensation, Napa, and Petsense.

The 2022 average daily traffic counts on Jefferson Street south of Interstate 44 were reported at 23,695 vehicles south to MO 32, 9,942 vehicles from MO 32 to Mountrose Street, and 7,460 vehicles from Mountrose Street south to Fremont Road.

According to Missouri Department of Transportation, the 2022 average daily traffic counts on Interstate 44 were reported at 34,851 vehicles north of Jefferson Avenue (MO 5) and 29,898 vehicles south of Jefferson Avenue. These heavy traffic volumes are sufficient for community and power centers anchored by major and junior anchor retailers.

Based on standard site selection criteria, these locations within the South Jefferson Avenue corridor are ideal for future retail development, offering excellent access, visibility, and exposure. The recommended future retail development sites are positioned within the corridor's existing hub at MO 32 and Jefferson Avenue.

1. Approximate 10 acres at the southeast corner of MO 32 and Jefferson Avenue
2. Vacant land on the south side of MO 32 immediately east of Lowe's
3. Outparcels within the Lebanon Marketplace
4. Vacant parcel at the southwest corner of Evergreen Parkway and Jefferson Avenue
5. Vacant parcel at the southeast corner of Bland Road and Jefferson Avenue

#### Interstate 44 @ Elm Street Interchange

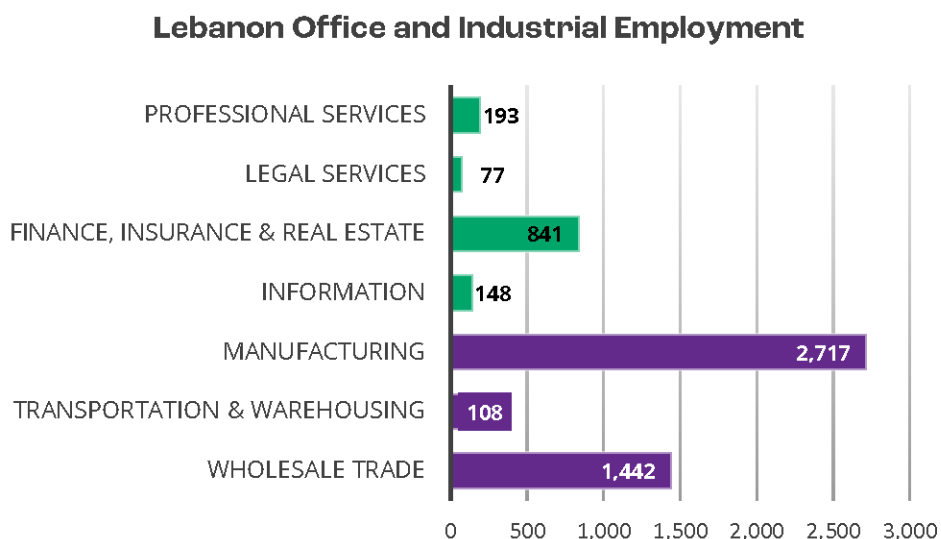
McDonalds, Eagle Stop, Taco Bell, and Dickey's Barbecue are newer businesses located at the southeast corner of the Interstate 44 interchange at Elm Street/Morgan Road. Vacant land exists immediately west of these businesses on the north side of State Street that offers freeway frontage and exposure. This parcel is suitable for future retail development.

## **Employment Market Analysis**

This section of the study evaluates office and industrial market conditions impacting the City of Lebanon. The goal is to identify future opportunities for Lebanon to support employment-related development.

### **Employment-Related Business Mix**

For this analysis industrial-related employment is defined as the manufacturing, wholesale trade, and transportation sectors while office-related employment includes the information; professional, scientific, and management; public administration; and finance, insurance, and real estate (“FIRE”) sectors. In the bar chart below office-related sectors are highlighted in “yellow” with industrial-related sectors highlighted in “blue.”



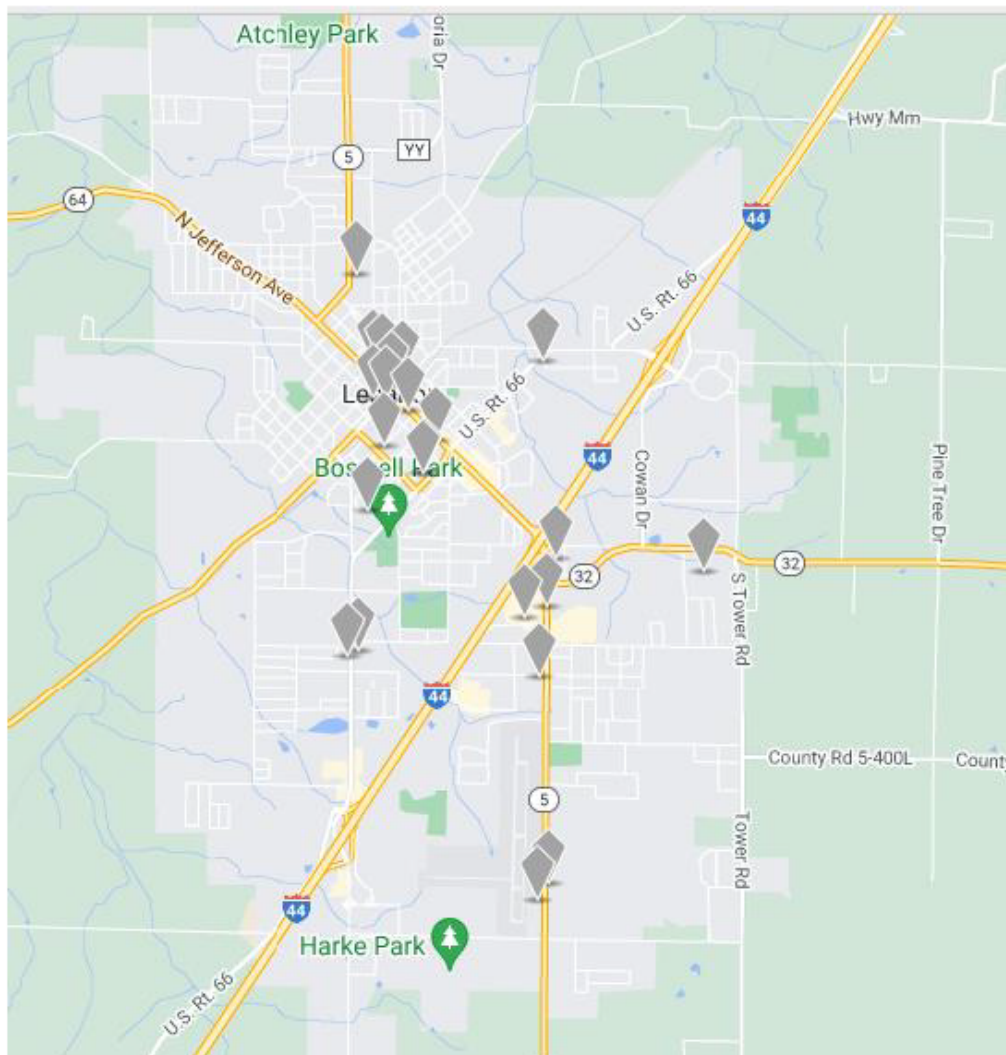
According to Esri Business Analyst, employment in Lebanon totals 13,611 jobs. Office-related employment consists of 1,259 jobs in the information, professional services, legal services, and finance, insurance, and real estate sectors, accounting for 9.2 percent of total employment. By comparison, office-related jobs in Missouri account for 21.4 percent of total employment. At an average space requirement of 200 to 225 square feet per employee, current employment levels can support approximately 251,800 to 283,275 square feet of occupied professional office space.

Industrial-related employment in Lebanon totals 4,267 jobs in the manufacturing, wholesale trade, and transportation and warehouse sectors, or 31.3 percent of total employment. By comparison, industrial-related jobs account for 28.1 percent of employment in Missouri. At an average space requirement of 800 to 1,000 square feet per employee, current employment levels can support approximately 3.4 million to 4.3 million square feet of occupied industrial space.

## **Office Market Overview**

CoStar provided historical and current office market trends in Lebanon, Missouri. The CoStar database was searched for existing professional and medical office buildings. The map below depicts the location of the surveyed office buildings in Lebanon.

### **Lebanon, Missouri Professional and Medical Office Buildings**



The office search identified 29 properties in Lebanon totaling 253,679 square feet of professional and medical office space. The Jefferson Avenue corridor and downtown serve as the prominent office districts. The table on page 32 summarizes office market trends in Lebanon from 2010 through the third quarter 2023.

The historic downtown serves as Lebanon central business district occupied by professional service firms such as banks, insurance agents, real estate, and financial planners. Businesses such as law offices, title companies, bail bonds, land services, mortgage companies, and government agencies are located downtown due to the presence of the Laclede County offices.

## Lebanon, Missouri Office Market Trends

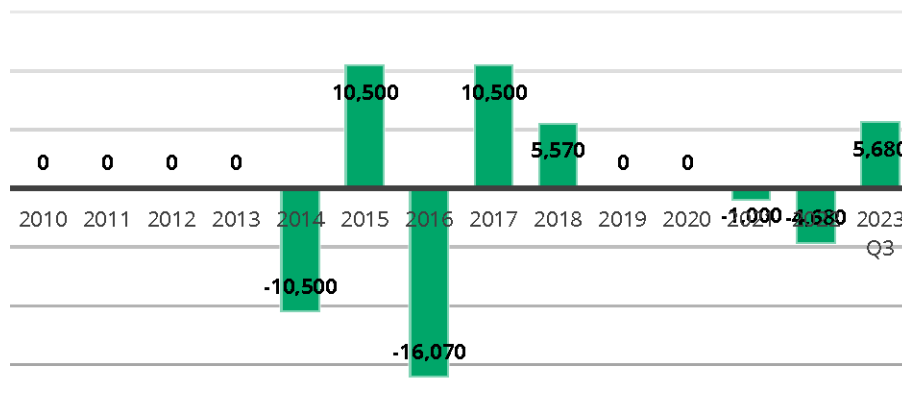
Year	# of Properties	Inventory Sq. Ft.	Vacant Space	Vacancy Rate	Net Absorption
2010	29	253,679	0	0.0%	0
2011	29	253,679	0	0.0%	0
2012	29	253,679	0	0.0%	0
2013	29	253,679	0	0.0%	0
2014	29	253,679	10,500	4.1%	-10,500
2015	29	253,679	0	0.0%	10,500
2016	29	253,679	16,070	6.3%	-16,070
2017	29	253,679	5,570	2.2%	10,500
2018	29	253,679	0	0.0%	5,570
2019	29	253,679	0	0.0%	0
2020	29	253,679	0	0.0%	0
2021	29	253,679	1,000	0.4%	-1,000
2022	29	253,679	5,680	2.2%	-4,680
2023 Q3	29	253,679	0	0.0%	5,680

Source: CoStar.

Since 2010, Costar reported no office buildings were built in Lebanon. The last office building was constructed in 2009.

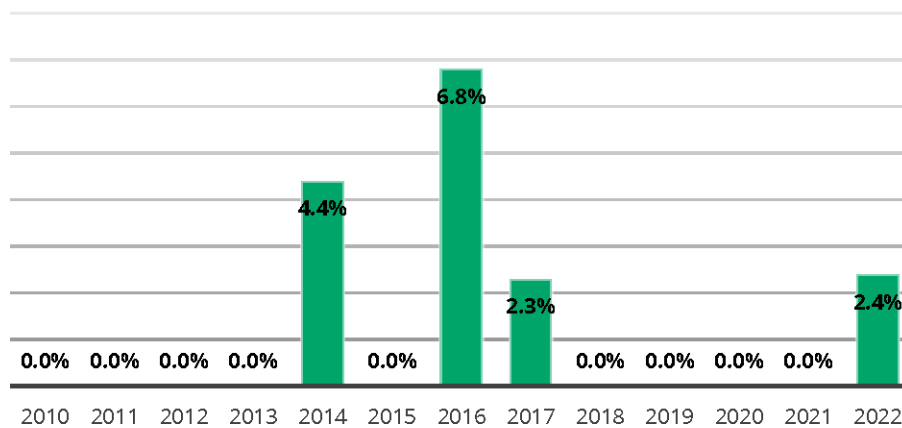
Since 2010, Costar reported no net office space was absorbed in Lebanon. Office space absorption peaked from 2015 to 2018, with net occupancy of 10,500 square feet of space and again through the third quarter of 2023 with 5,680 square feet of net space absorption.

### Lebanon, Missouri Net Office Space Absorption (Sq. Ft.)



For most of the past decade the surveyed office properties operated at full occupancy. Vacancies peaked at 4.4 percent in 2014, 6.8 percent in 2016, and 2.3 percent in 2017. From 2018 through 2021, the Lebanon office market operated at full occupancy. By year-end 2022, the overall vacancy rate increased to 2.4 percent, but by the third quarter 2023 the market was again operating at full occupancy. **The absence of vacant office space available for immediate occupancy serves as a constraint to accommodating the expansion of existing tenants or attracting new businesses to Lebanon. The tight market conditions indicate short-term new additions to office space supply may be supportable.**

**City of Lebanon, Missouri  
Office Space Vacancy Rate Trends**

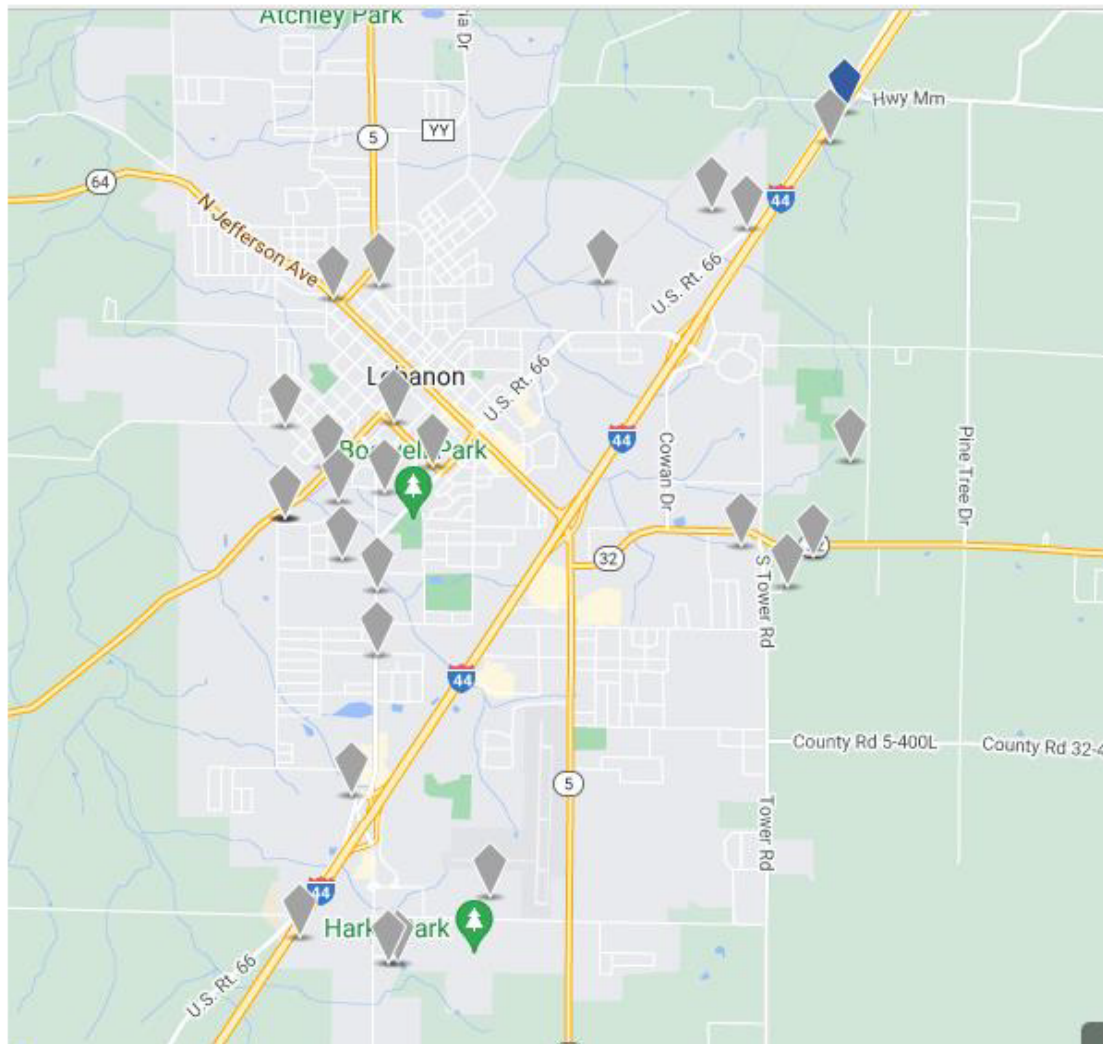


To conclude, Lebanon supports a modest inventory of professional office space that is primarily occupied by small personal service firms that cater to the area residents. The COVID-19 pandemic did not have an adverse impact on the office market as operating conditions remained healthy. Continued population growth should assist in increasing the need for professional and medical services and occupied office space. The current absence of office space available for lease has placed a constraint on the ability to support the expansion of existing office tenants and attract new businesses to Lebanon.

## **Industrial Market Overview**

CoStar provided historical and current industrial market trends in Lebanon, Missouri. The CoStar database was searched for existing industrial buildings. The map below depicts the location of the surveyed office buildings in Lebanon.

### **Lebanon, Missouri Industrial Buildings**



Industrial-related employment in Lebanon totals 4,267 jobs in the manufacturing, wholesale trade, and transportation and warehouse sectors, or 31.3 percent of total employment. The industrial building search identified 30 properties in Lebanon totaling 821,712 square feet of industrial space. The largest concentrations of industrial space are south of downtown along the railroad line and within the Interstate 44 corridor near the three interchanges servicing Lebanon. Notable industrial businesses operating in Lebanon include Tracker Marine, Emerson Climate Technologies, Missouri Cooperage, Durham Company, G-3 Boats, and Lowes Boats. The table on page 35 summarizes industrial market trends in Lebanon from 2010 through the third quarter 2023.

### Lebanon, Missouri Industrial Market Trends

Year	# of Properties	Inventory Sq. Ft.	Vacant Space	Vacancy Rate	Net Absorption
2010	30	821,712	0	0.0%	0
2011	30	821,712	0	0.0%	0
2012	30	821,712	7,244	0.9%	-7,244
2013	30	821,712	7,244	0.9%	0
2014	30	821,712	11,389	1.4%	-4,145
2015	30	821,712	5,000	0.6%	6,389
2016	30	821,712	5,000	0.6%	0
2017	30	821,712	0	0.0%	5,000
2018	30	821,712	0	0.0%	0
2019	30	821,712	23,790	2.9%	-23,790
2020	30	821,712	0	0.0%	23,790
2021	30	821,712	0	0.0%	0
2022	30	821,712	6,200	0.8%	-6,200
2023 Q3	30	821,712	8,200	1.0%	0

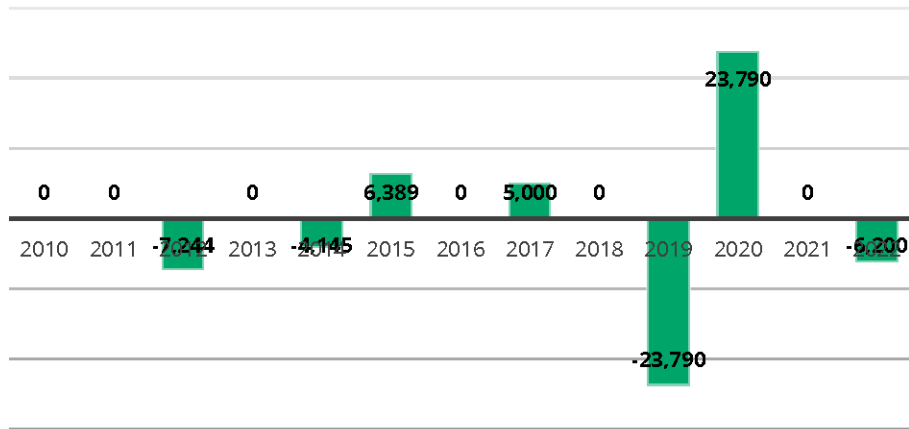
Source: CoStar.

Ice Cream Factory (ICF) of Eldon has purchased an 86,000 square foot former industrial facility in Lebanon that will serve as the company's new manufacturing plant. Renovations are underway and the facility is anticipated to create 130 total jobs over the next five years.

The City of Lebanon owns the Lebanon Industrial Park at U.S. Route 66 and Wyota Drive. Existing businesses include Durham C-Line Division, Detroit Tool, and Dowco. Construction has started on three new businesses with 40 to 50 acres remaining available for future development.

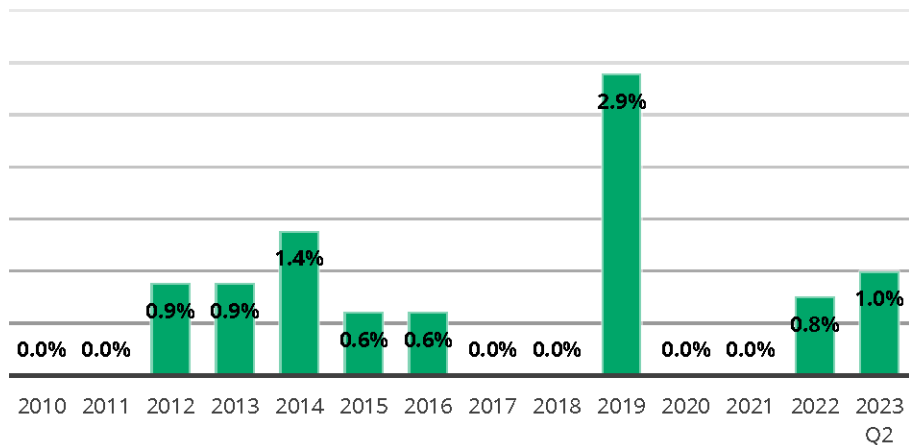
According to Costar, since 2010, the surveyed industrial properties in Lebanon remained largely occupied. The modest inventory of vacant space and net absorption of industrial space might stem from the abundance of single-tenant and owner-occupied buildings.

### Lebanon, Missouri Industrial Market Net Space Absorption (Sq. Ft.)



Since 2010, the Lebanon industrial market has operated at vacancies well below market equilibrium. The overall industrial vacancy rate for the Lebanon, Missouri market peaked at 9.9 percent in 2019. From 2020 through the third quarter 2023, the Lebanon industrial market operated at or near full occupancy.

### City of Lebanon, Missouri Industrial Vacancy Rate Trends



By the third quarter 2023, Lebanon supported 821,712 square feet of industrial space. Including such major manufacturers as Tracker Marine, Emerson Climate Technologies, Missouri Cooperage, The Durham Company, and Marine Electrical Products, 14 additional industrial buildings totaling an additional 1,132,972 square feet of building area, bringing Lebanon's total industrial inventory to over 1.95 million square feet. **The absence of industrial space available for immediate occupancy is a barrier to accommodating expansion of existing industrial businesses and attracting prospective businesses.**

## **Forecast Space Need**

Professional office and industrial space need projections for the City of Lebanon through the year 2040 provide an understanding of future market conditions directly impacting the feasibility of supporting new employment-related development.

### **Professional Office Space**

According to Costar, by year-end 2022, Lebanon supported 237,884 square feet of office space, operating at an overall vacancy rate of 2.4 percent. The need for professional office space is closely correlated with expansion in office-related employment sectors. Future need for professional office space was forecast utilizing an occupational employment-driven model. This model was designed using the variables of increased employment in categories of economic activity typically associated with demand for office space and average space requirements per employee. A share of regional demand is assigned to the submarket (and specific project) based on location, competition, access, project scale, etc.

According to Esri Business Analyst, office-related employment in Lebanon totals 1,259 jobs in the information; professional, scientific, and management; public administration; and finance, insurance, and real estate sectors, accounting for 9.2 percent of total employment.

By May 2023, employment in Laclede County totaled 16,470 jobs. From 2023 through 2040, employment growth in Laclede County is projected to support an estimated 1,531 to 2,181 new jobs. The U.S. Census Bureau reported that 81.4 percent of Laclede County residents place of work is in the county with a mean commute time of 20.7 minutes. According to Esri Business Analyst, Lebanon supports 13,611 jobs, equating to 82.6 percent of the county total. During 2019, the U.S. Census Bureau reported 8,816 workers commuted into the city and 3,208 residents employed in the city.

Lebanon is Laclede County's principal employment center and through 2040 is estimated to account for 75 percent to 80 percent of the countywide job growth, equating to 1,148 to 1,745 jobs. Office-related employment in Lebanon is forecast to account for 10 percent to 12 percent of total job growth, yielding 115 to 209 new jobs.

Office space need created by the future growth in office-related employment was forecast by applying standard job creation ratios published by NAIOP of 1.0 job per 200 to 225 square feet of office space that accounts for both owner-occupied and speculative office space. From 2023 through 2040, office-related job growth in Lebanon is projected to support the need for 23,000 square feet to 47,025 square feet of occupied owner-occupied and speculative office space.

**Forecast Professional Office Space Need  
Lebanon, Missouri; 2023 to 2040**

	Conservative Scenario	Optimistic Scenario
<b>Lebanon, Missouri</b>		
Office-Related Employment Growth	115	196
Net Office Space Demand (Sq. Ft.)	23,000	47,025
Average Annual Office Space Demand (Sq. Ft.)	1,278	2,613

Source: Canyon Research Southwest, Inc.; November 2023.

As outlined in the table on the following page, accounting for the current inventory of vacant office space in Lebanon and a market equilibrium vacancy rate of 7.0 percent, through 2040 the City of Lebanon is estimated to support the need for approximately 37,000 square feet to 62,000 square feet of new office space.

Based on an average floor-area-ratio of 25 percent to 30 percent, the forecast office space need through 2040 would absorb an estimated 2.8 to 3.4 acres of commercial land under the conservative scenario and 4.8 acres to 5.7 acres under the optimistic scenario.

**Supportable New Office Space Estimates  
Lebanon, Missouri; 2023 – 2040**

	Conservative Scenario	Optimistic Scenario
<b>Supportable New Office Space Need</b>		
Lebanon Inventory of Occupied Office Space 2022 Q4	232,204	232,204
Forecast Office Space Demand 2022-2040	23,000	47,025
Total Occupied Office Space Inventory 2040	255,204	279,229
Market Equilibrium Office Space Need	274,413	300,246
Less: Existing Inventory of Office Space 2022 Q4	237,884	237,884
Supportable New Office Space 2022-2040	36,529	62,362
<b>Supportable Development Acres</b>		
25% FAR	3.4	5.7
30% FAR	2.8	4.8

Source: Canyon Research Southwest, Inc.; November 2023.

### Medical Office Space

Mercy Hospital Lebanon is a 58-bed, acute-care, general medical and surgical facility in Lebanon, Missouri. During FY 2022, Mercy Hospital Lebanon had 99,663 patient visits, 3,254 surgeries, 26 physicians, and 420 co-workers. The presence of Mercy Hospital is anticipated to fuel future medical office expansion in Lebanon.

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

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

According to physician census data compiled by the Federation of State Medical Boards (FSMB) in 2022, the number of licensed physicians in the United States totaled 1,073,616. The United State population of 329.7 million, equating to 307 licensed physicians per 100,000 population. The 11,966 licensed physicians in Missouri amounts to an average of 513 physicians per 100,000 population.

From 2023 to 2040, the City of Lebanon population is forecast to increase by 2,074 to 2,956 residents. Based on the statewide average for physician density and forecast population growth produces the need by 2040 for 11 to 15 additional physicians. The Medical Group Management Association ("MGMA") in its annual costs survey reported that for family practices, the median medical office space need is approximately 1,900 square feet per full-time equivalent physician.

Based on these factors, from 2023 through 2040, population growth within the City of Lebanon is estimated to support the need for 20,900 to 28,500 square feet of medical office space.

#### **Forecast Medical Office Space Need**

##### **Lebanon, Missouri; 2023 to 2030**

		Moderate Scenario	Optimistic Scenario
<b>Lebanon, Missouri</b>			
Growth in Physicians		11	15
Net Medical Office Space Demand (Sq. Ft.)		20,900	28,500
Average Annual Space Demand (Sq. Ft.)		1,161	1,583

Based on an average floor-area-ratio of 25 percent to 30 percent, the forecast medical office space need through 2040 would absorb an estimated 1.6 to 1.9 acres of commercial land under the conservative scenario and 2.2 acres to 2.6 acres under the optimistic scenario.

## Industrial Space

By year-end 2022, Lebanon supported 1.95 million square feet of industrial space, operating at 100 percent occupancy.

The need for industrial space is a function of employment, investment, and technology. The U.S. Department of Labor defines industrial employment as jobs in the manufacturing, wholesale trade, and transportation and warehousing industries. Industrial-related employment in Lebanon totals 4,267 jobs in the manufacturing, wholesale trade, and transportation sectors, or 31.3 percent of total employment.

Through 2040, the City of Lebanon is forecast to add 1,148 to 1,745 jobs. Industrial employment is forecast to account for 25 to 30 percent of total job growth, adding an estimated 287 to 524 jobs.

Space needs created by the future growth in industrial employment was forecast by applying standard job creation ratios of 1.0 job per 800 to 1,000 square feet of light manufacturing, warehouse, and flex industrial space. These job creation rates account for both owner-occupied and speculative industrial space.

### **Forecast Industrial Space Need Lebanon, Missouri; 2023 to 2040**

		Conservative Scenario		Optimistic Scenario
<b>Lebanon, Missouri</b>				
Industrial-Based Employment Growth		287		524
Industrial Space Demand (Sq. Ft.)		229,600		524,000
Average Annual Industrial Space Demand (Sq. Ft.)		12,756		27,278

Source: Canyon Research Southwest, Inc.; November 2023.

From 2023 through 2040, industrial job growth in Lebanon, Missouri is projected to support the need for 229,600 to 524,000 square feet of both owner-occupied and speculative industrial space.

Accounting for the current inventory of vacant industrial space in Lebanon and a market equilibrium vacancy rate of 7.0 percent, through 2040 the city is estimated to support the development of approximately 394,000 to 710,000 square feet of new industrial space.

Based on an average floor-area-ratio of 35 percent to 40 percent, the forecast industrial space need through 2040 would absorb an estimated 22.6 acres to 22.8 acres of industrial land under the conservative scenario and 40.8 acres to 46.6 acres under the optimistic scenario.

**Supportable New Industrial Space Estimates  
Lebanon, Missouri; 2023 – 2040**

	Conservative Scenario	Optimistic Scenario
<b>Supportable New Industrial Space Need</b>		
Lebanon Inventory of Occupied Industrial Space 2022 Q4	1,954,684	1,954,684
Forecast Industrial Space Demand 2023-2040	229,600	524,000
Total Occupied Industrial Space Inventory 2040	2,184,284	2,478,684
Market Equilibrium Industrial Space Need (7% Vacancy)	2,348,692	2,665,251
Less: Existing Inventory of Industrial Space 2022 Q4	-1,954,684	-1,954,684
Supportable New Industrial Space 2023-2040	394,008	710,567
<b>Supportable Development Acres</b>		
35% FAR	25.8	46.6
40% FAR	22.6	40.8

Source: Canyon Research Southwest, Inc.; November 2023.

### **Site Evaluation**

A site evaluation has been prepared on the Planning Area for professional office, medical office, and industrial land uses.

#### **Professional and Medical Office**

Lebanon supports 237,884 square feet of professional and medical office space. The Jefferson Avenue corridor and downtown serve as the prominent office districts.

A feasible professional office building development site possesses the following characteristics: location within an established office market, excellent accessibility and exposure; appropriate parcel size and infrastructure; availability to a large and diverse labor pool; and compatibility with surrounding land uses. Suburban office development tends to gravitate to convenient freeway locations and/or mixed-use environments that provide the needed support services (i.e., restaurants, retail goods, lodging and entertainment) and prestigious business image.

Using these site selection criteria, the following properties in Lebanon were identified for the potential to support future professional and medical office development.

1. Under-utilized properties along Commercial Street in downtown Lebanon
2. Under-utilized properties along Jefferson Avenue from Commercial Street west to 7<sup>th</sup> Street
3. Vacant parcel between Evergreen Parkway and Bland Road west of Jefferson Avenue

4. Vacant land on the east side of Cowan Drive from Copeland Drive north to Millcreek Road
5. Vacant land surrounding the Mercy Hospital Lebanon
6. Vacant land on the east side of Cowan Drive from Copeland Drive north to Millcreek Road

## **Industrial**

The largest concentrations of industrial space in Lebanon are along the railroad line south of downtown and the Interstate 44 corridor. Interstate 44 runs through Lebanon, providing direct access to the St. Louis MSA to the northeast and metro areas of Springfield, Missouri and Tulsa, Oklahoma to the southwest. Interstate 44 is improved as a four-lane divided highway with interchanges serving the City of Lebanon at Millcreek Road, Jefferson Avenue, and Elm Street. The presence of Interstate 44 has assisted in the construction and continued operation of logistics, warehouse, and manufacturing firms in Lebanon.

A feasible industrial development site possesses the following characteristics: existing concentration of industrial space; excellent location and access; suitable transportation infrastructure; availability to a large and diverse labor pool; proximity to customers; and compatibility with surrounding land uses. Industrial development tends to concentrate along transportation infrastructure such as freeway corridors, rail lines, and airports.

Using these site selection criteria, potential locations in Lebanon were evaluated for the potential to support future logistics, warehouse, and manufacturing development. Given existing development patterns the vacant land within the City of Lebanon that is recommended to be designated for future industrial use includes:

1. Vacant land at the northeast corner of Cowan Drive and Millcreek Road
2. Vacant land on the north side of Millcreek Road west of Carmeco Road
3. City-owned industrial park at U.S. Route 66 and Wyota Drive
4. Interstate 44 corridor north of the city limits
5. Southwest corner of Commercial Street and Beck Land south to Bland Road alignment

## **Residential Housing Market Analysis**

This section of the report evaluates the City of Lebanon residential housing market with the goal is to identify current and future opportunities to support new housing stock.

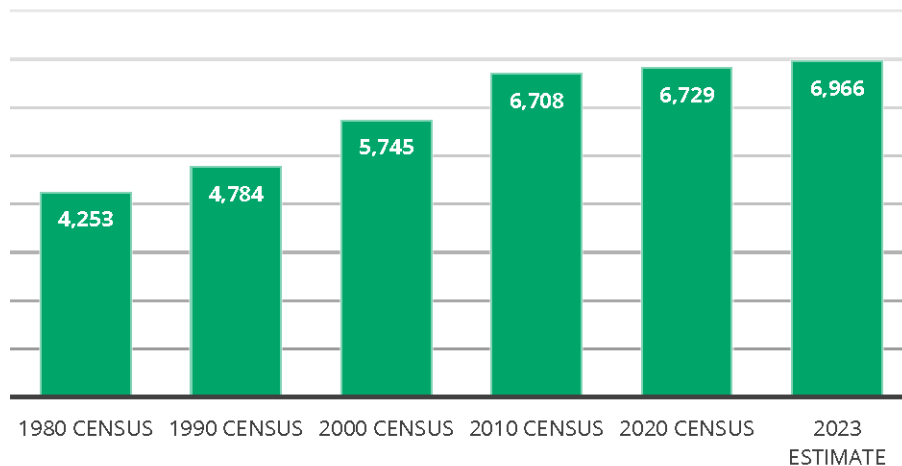
### **Housing Stock Characteristics**

To identify the City of Lebanon's existing housing stock characteristics this section of the study addresses the total inventory of dwelling units, occupancies, age, mix of housing types, housing values, new housing construction trends, and recent owner-occupied housing sales activity.

### **Housing Inventory Trends**

Over the past 40 years the Lebanon's housing stock has increased steadily. The 1980 Census reported the Lebanon housing stock at 4,253 dwelling units. By the 2010 Census, Lebanon's housing stock increased by 57.7 percent to 6,708 dwelling units. Housing stock growth was the highest from 2000 to 2010 when 963 new housing units were added. From 2010 through 2020, the city's housing stock increased by just 21 dwelling units. Esri Business Analyst estimated that Lebanon's current housing inventory totals 6,966 dwelling units of which 6,262 dwelling units are occupied.

**Lebanon, Missouri Housing Units**



From 2000 through 2023, the City of Lebanon issued building permits for the construction of 911 new single-family housing units, 56 duplex units, and 712 multi-family dwelling units. Single-family construction peaked during the national housing boom from 2000 through 2006 with a total of 593 new homes permitted.

From 2020 to 2023, building permits were issued for 56 duplex units, peaking from 2017 to 2017 for a total of 46 housing units. Since 2000, building permits were issued for 712 multi-family housing units, peaking from 2000 to 2011 with a total of 558 dwelling units. The table on the following page outlines annual residential building permits issued by the City of Lebanon since 2000.

**Residential Building Permit Activity  
City of Lebanon, Missouri; 2000-2023**

Year	Single Family	Duplex	Multi-Family	Totals
2000	76		30	106
2001	64		26	90
2002	64		38	102
2003	77		61	138
2004	90		48	138
2005	154		40	194
2006	68		58	126
2007	37		79	116
2008	21		64	85
2009	18		42	60
2010	10		42	52
2011	6		30	36
2012	3	16	0	19
2013	9	4	0	13
2014	13	4	0	17
2015	11	8	0	19
2016	13	2	0	15
2017	10	12	56	78
2018	16	6	0	22
2019	41	2	0	43
2020	43	2	0	45
2021	41	0	16	57
2022	26	0	82	108
2023	42	2	28	72
<b>Totals</b>	<b>911</b>	<b>56</b>	<b>712</b>	<b>1,679</b>

Source: City of Lebanon.

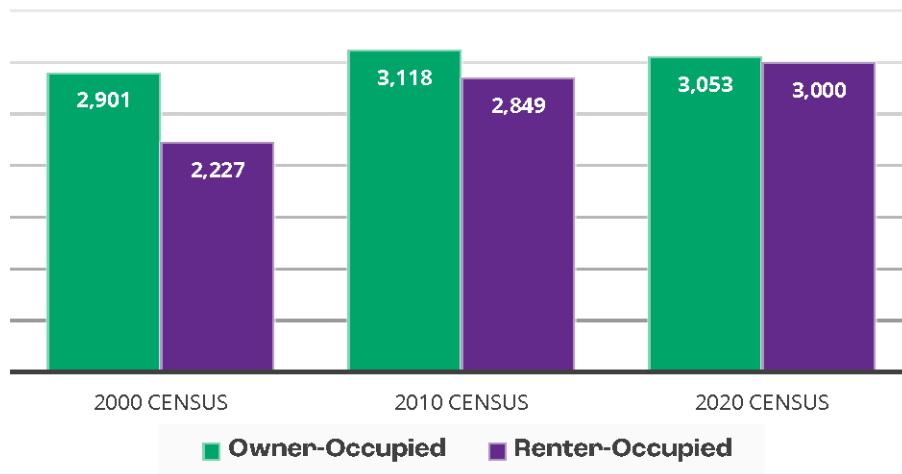
### **Housing Tenure Trends**

The 2000 Census reported that 5,132 housing units were occupied in Lebanon, including 2,905 owner-occupied units and 2,227 renter-occupied units. From 2000 to 2010, the number of owner-occupied housing units in Lebanon increased 7.5 percent to 3,118 units while the inventory of renter-occupied housing units increased by 27.9 percent to 2,849 housing units.

From 2010 through 2020, the housing tenure for Lebanon decreased by 65 owner-occupied housing units and increased by 151 renter-occupied housing units. As a share of the total occupied housing stock, owner-occupied housing declined from 56.5 percent in 2000 to 50.4 percent by 2020 while renter-occupied housing increased from 43.5 percent in 2000 to 49.6 percent by 2020. By comparison, during 2020 the Missouri housing stock was reported at 67.1 percent for owner-occupied housing units and 32.9 percent with renter-occupied housing units. Lebanon's growing

rental housing market stems from the fact that 43.7 percent of households possess annual incomes under \$35,000 and are perpetual renters as well as tighter mortgage lending requirements.

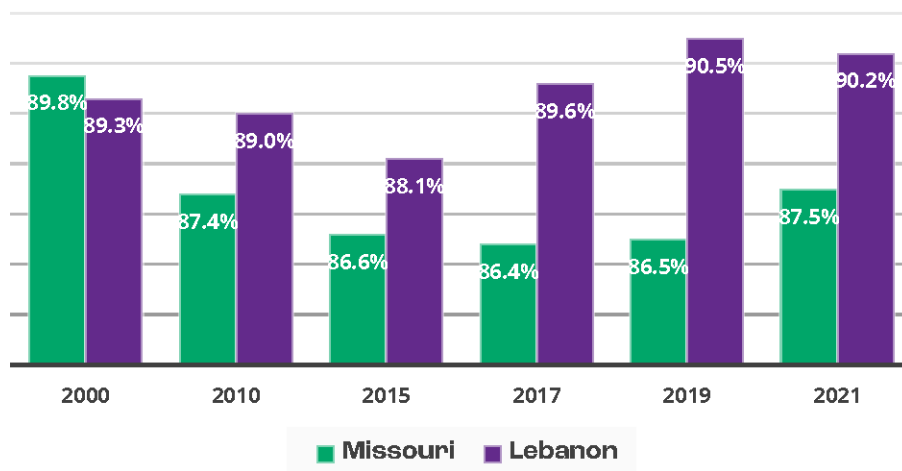
### Lebanon, Missouri Housing Tenure Trends



### Housing Occupancy Trends

The U.S. Census reported the overall occupancy rate for housing in Lebanon declined slightly from 89.3 percent in 2000 to 89.0 percent by 2010. The net gain in occupied housing units over the decade totaled 963 dwelling units. Lebanon's housing occupancy rate declined to 88.1 percent in 2015. Over the past six years Lebanon's overall housing occupancy rate improved to a high of 90.2 percent by 2021.

### Housing Occupancy Rate Comparison



From 2010 to 2021, housing occupancy rates for Lebanon significantly outpaced the statewide average. During 2010, Lebanon's housing occupancy rate of 89.0 percent compared favorably against that of 87.4 percent for Missouri. By 2021, Lebanon's housing occupancy rate of 90.2 percent exceeded the statewide average of 87.5 percent.

## **Age of Housing Stock**

The table on the following page compares the age of the Lebanon housing stock with that of the State of Missouri as reported by the U.S. Census Bureau for 2021.

The age of the City of Lebanon housing stock is slightly newer than the statewide inventory. Homes built since 1980 account for 52.0 percent of Lebanon's existing inventory and 25.8 percent built prior to 1960. By comparison, 46.7 percent of the state's housing stock was built since 1980 with 27.3 percent built prior to 1960.

In recent years there has been activity by flippers to purchase housing in the older neighborhoods of Lebanon, renovate the homes, and sell them for a profit. These older parts of the city surrounding downtown have been targeted given the age, condition, and pricing of the housing stock. The constraints for infill housing are the poor condition of many of the older homes and large gap in price of older homes compared to new construction.

### **Lebanon, Missouri Housing Stock by Year Built, 2021**

Year Structure Built	# of Units	% of Total	Missouri
<b>Total Housing Units</b>	<b>6,628</b>		<b>2,807,632</b>
Built 2020 or Later	0	0.0%	0.6%
Built 2010 to 2019	32	0.5%	8.3%
Built 2000 to 2009	1,522	23.6%	13.4%
Built 1990 to 1999	963	14.5%	12.6%
Built 1980 to 1989	890	13.4%	11.8%
Built 1970 to 1979	749	11.3%	14.7%
Built 1960 to 1969	756	11.4%	11.2%
Built 1950 to 1959	710	10.7%	9.6%
Built 1940 to 1949	712	10.7%	4.5%
Built 1939 or Earlier	294	4.4%	13.2%

Source: U.S. Census.

## **Housing Stock Mix**

Lebanon's housing stock mix is influenced by its rural character whereby the demand for single-family housing exceeds that for attached rental housing. Detached single-family housing accounts for 64.0 percent of the housing stock in Lebanon compares to the statewide rate of 70.5 percent.

Multi-family housing accounts for 22.9 percent of Lebanon's housing stock compared to 20.2 percent for Missouri. Large-scale properties in Lebanon with 20 or more dwelling units total 4.9 percent of the housing stock, compared to 5.2 percent statewide. Duplexes account for 7.0 percent of the Lebanon housing stock compared to 3.3 percent for Missouri. Properties with 3 to 9 housing units account for 7.0 percent of Lebanon's housing stock, compared to 8.3 percent statewide.

### Lebanon, Missouri Housing Stock by Type, 2021

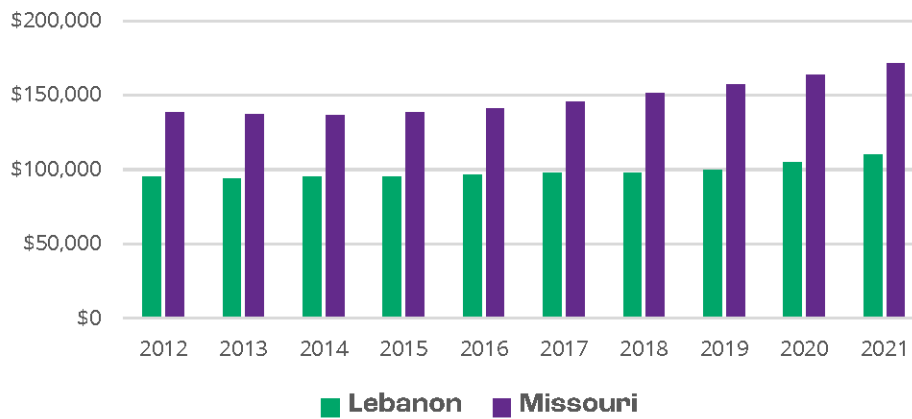
Units in Structure	# of Units	% of Total	Missouri %
1-Unit, Detached	4,241	64.0%	70.5%
1-Unit, Attached	487	7.3%	3.6%
2 Units	461	7.0%	3.3%
3 or 4 Units	368	5.6%	4.6%
5 to 9 Units	96	1.4%	3.7%
10 to 19 Units	264	4.0%	3.4%
20+ Units	327	4.9%	5.2%
Mobile Home	384	5.8%	5.7%
Boat, RV, Van, etc.	0	0.0%	0.1%
<b>Total Housing Units</b>	<b>6,628</b>	<b>100.0%</b>	<b>100.0%</b>

Source: U.S. Census Bureau.

### Housing Values

According to the *American Community Survey*, during 2012 the median housing value in Lebanon of \$95,400 lagged the statewide median of \$171,800. Lower housing values are common among rural communities given an older housing stock and below average household income levels. Stemming from the national housing bust, the median housing value for both Lebanon and the State of Missouri declined steadily from 2010 through 2013. From 2015 to 2021, the median housing value in Lebanon rose 15.2 percent while Missouri housing reported value appreciation of 24.1 percent. During 2020 and 2021, the median home value in Lebanon increased by 10.2 percent to \$110,000. The bar chart below provides a comparison of median housing values between the City of Lebanon and the State of Missouri from 2012 to 2021.

**Median Housing Value Trends**  
**City of Lebanon vs. State of Missouri**



Forty-five percent of the owner-occupied housing stock in Lebanon is valued under \$100,000, compared to just 23.5 percent statewide. Meanwhile, housing valued at more than \$200,000 accounts for 17.1 percent of Lebanon's housing stock compared to 41.4 percent statewide. The price range for first-time homebuyers generally ranges from \$175,000 to \$250,000. Given the cost of land, infrastructure, and construction, it is difficult to meet the need for first-time home buyers.

### **Housing Value Comparison; 2021** **City of Lebanon vs. State of Missouri**

Price Range	City of Lebanon	State of Missouri
Less than \$50,000	16.2%	8.2%
\$50,000 - \$99,999	28.8%	15.3%
\$100,000 - \$149,999	24.3%	17.5%
\$150,000 - \$199,999	13.7%	17.7%
\$200,000 - \$299,999	7.2%	20.9%
\$300,000 - \$499,999	4.9%	14.7%
\$500,000+	5.0%	5.8%

Source: U.S. Census Bureau.

Single-family homes located outside of the city limits in Laclede County tend to be on more land, larger in size, and priced much higher than homes located in Lebanon.

### **Occupancy by Housing Type**

Homeowners in Lebanon are more likely to occupy detached single-family housing while renters generally occupy attached multi-family housing. According to the U.S. Census Bureau, during 2021 owner-occupied housing in Lebanon accounted for 50.9 percent of the entire occupied housing stock with renter-occupied accounting for 49.1 percent. By comparison, owner-occupied housing accounts for 67.6 percent of Missouri's total occupied housing stock with renter-occupied accounting for 33.4 percent. Lebanon's below average median household income may contribute to the well below average owner-occupied housing stock.

For 2021, according to the U.S. Census Bureau, of Lebanon's housing stock an estimated 5,979 dwelling units were occupied, including 3,042 owner-occupied housing units and 2,937 renter-occupied housing units. Detached single-family homes accounted for 90.4 percent of all occupied owner-occupied housing units. Meanwhile, renters were much less likely to occupy detached single-family homes accounting for just 38.7 percent of all occupied rental units.

Properties in Lebanon with ten or more units are the most popular attached housing product for renters accounting for 18.0 percent of all renter-occupied units. Duplexes account for 10.5 percent of all renter-occupied units, while structures with 3 to 4 dwelling units account for 11.3 percent of all renter-occupied units. Structures with 5 to 9 dwelling units account for just 2.5 percent of all renter-occupied housing units in Lebanon.

**City of Lebanon Occupied Housing Stock by Type – 2021**  
**Owner-Occupied vs. Renter-Occupied Housing**

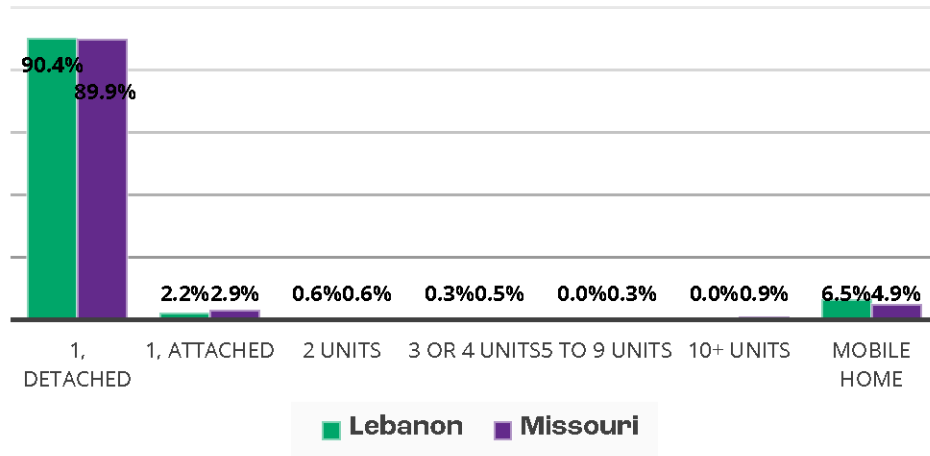
Housing Type	Total	Owner-Occupied	Renter-Occupied
<b>Occupied Housing Units</b>	<b>5,979</b>	<b>3,042</b>	<b>2,937</b>
Units in Structure			
1-Unit, Detached	64.0%	90.4%	38.7%
1-Unit, Attached	7.3%	2.2%	14.3%
2 Units	7.0%	0.6%	10.5%
3 or 4 Units	5.6%	0.3%	11.3%
5 to 9 Units	1.4%	0.0%	2.5%
10 or More Units	8.9%	0.0%	18.0%
Mobile Home and other Types of Housing	5.8%	6.5%	4.6%
<b>Totals</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Source: U.S. Census Bureau.

**For-Sale Housing Market**

According to the *American Community Survey 2021*, owner-occupied housing in Lebanon accounted for 50.9 percent of the entire occupied housing stock, compared to 67.6 percent of Missouri's total occupied housing stock. Detached single-family homes account for 90.4 percent of Lebanon's owner-occupied housing stock, compared to 89.9 percent for the State of Missouri. The predominance of owner-occupied detached single-family housing is common within rural communities. One-unit attached housing accounts for 2.2 percent of Lebanon's owner-occupied housing and multi-family units with 2 to 4 dwelling units accounting for 0.9 percent of owner-occupied housing. Mobile homes account for 6.5 percent of Lebanon's owner-occupied housing, compared to 4.9 percent of the statewide total.

### Owner-Occupied Housing by Product Type City of Lebanon vs. State of Missouri, 2021



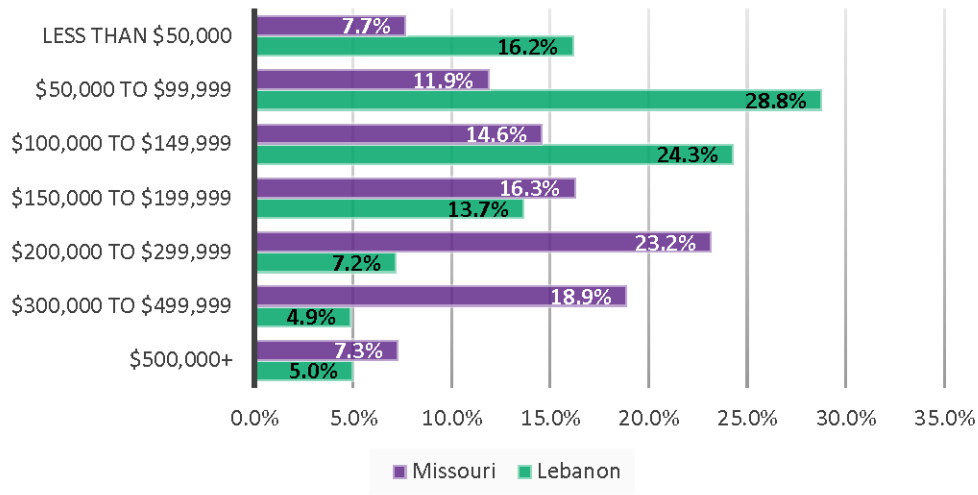
As reported by the *American Community Survey 2021*, 45.0 percent of Lebanon's owner-occupied housing stock was valued under \$100,000 compared to 19.6 percent for Missouri. The abundance of lower priced homes is attributed to the age, size, and condition of Lebanon's housing stock.

Lebanon maintains an above average inventory of moderately priced homes, with 24.3 percent of the owner-occupied housing stock valued at \$100,000 to \$149,999 compared to 14.6 percent statewide. Homes valued at \$150,000 to \$199,999 account for 13.7 percent of Lebanon's owner-occupied housing stock which compares to 16.3 percent of the statewide housing stock.

Move-up housing priced from \$200,000 to \$299,999 accounts for just 7.2 percent of Lebanon's owner-occupied housing stock, compared to 23.2 percent statewide. With 13.8 percent of Lebanon households earning \$75,000 to \$99,999 annually (compared to 12.5% statewide), a larger market for move-up housing priced from \$200,000 to \$299,999 may be supportable.

Just 9.9 percent of owner-occupied housing in Lebanon is valued over \$300,000 (compared to 26.2% statewide). Given that 10.8 percent of Lebanon households earn \$100,000 or more annually (compared to 23.7% statewide), suggests that a slightly larger market for upscale housing priced over \$300,000 may be supportable.

**Owner-Occupied Housing Values by Price Range  
City of Lebanon vs. State of Missouri, 2021**



Multiple Listing Service (“MLS”) data was consulted to ascertain recent single-family home sales velocity and pricing trends in the Lebanon city limits. From January 1, 2022, through July 31, 2023, a total of 446 homes sold in Lebanon garnering \$79 million in proceeds. Homes sold since 2022 in Lebanon featured a wide range of price points, garnered an average price of \$177,209 and a median price of \$162,000. Housing values in Lebanon are impacted by below average household income levels that drive the need for housing priced under \$250,000. The most active portions of Lebanon for home sales included the northern and southern areas of the city. The table on the following page illustrates total sale proceeds, average home size, and sales per square foot by price range for those homes sold in Lebanon since January 1, 2022.

**City of Lebanon Home Sales  
From January 1, 2022, to July 31, 2023**

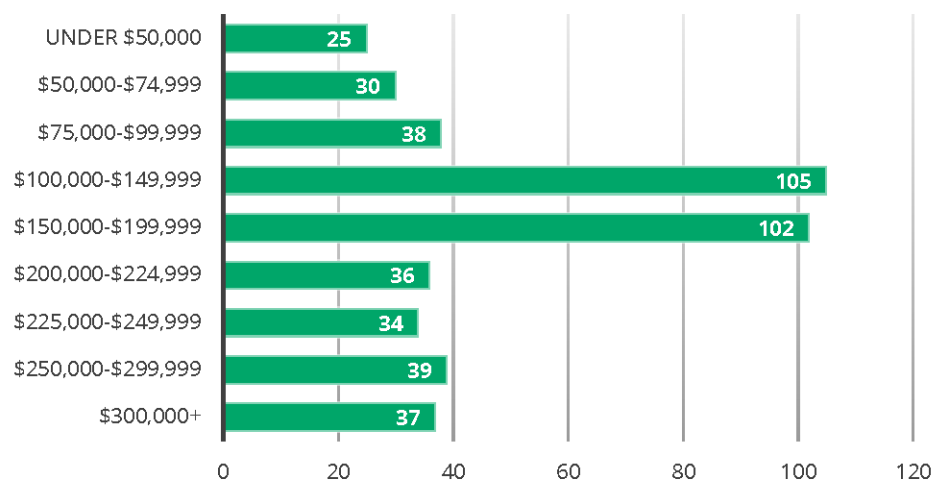
Price Range	# of Sales	Sale Proceeds	Average Size (SF)	Price Per Sq. Ft.
Less than \$50,000	25	\$822,600	990	\$33.24
\$50,000 to \$74,999	30	\$1,893,095	1,001	\$63.03
\$75,000 to \$99,999	38	\$3,272,350	973	\$88.51
\$100,000 to \$149,999	105	\$13,081,591	1,135	\$109.73
\$150,000 to \$199,999	102	\$17,807,648	1,480	\$117.97
\$200,000 to \$224,999	36	\$7,529,400	1,760	\$122.62
\$225,000 to \$249,999	34	\$8,086,600	1,738	\$136.85
\$250,000 to \$299,999	39	\$10,572,747	1,958	\$138.81
\$300,000+	37	\$15,969,060	2,742	\$154.71
<b>Totals</b>	<b>446</b>	<b>\$79,035,091</b>	<b>1,480</b>	<b>\$119.75</b>

Source: Multiple Listing Service.

Since January 1, 2022, 20.9 percent of homes sold in Lebanon were priced under \$100,000. Most of the lower-priced homes sold were located within the older parts of central and western Lebanon surrounding downtown that consist primarily of small homes under 1,000 square feet.

Since January 2022, 46.4 percent of all home sales in Lebanon were priced from \$100,000 to \$199,999, representing the bulk of the first-time homebuyer market. Housing priced at \$200,000 to \$249,999 accounted for 15.7 percent of total sales. Upscale housing priced at \$250,000 and above accounted for 17.0 percent of all home sales. Most of the upscale housing is located within the northwest quadrant of Lebanon. Lebanon’s modest inventory of upscale housing priced over \$300,000 (8.3% of all home sales) places a constraint on attracting senior management, physicians, and high-income households.

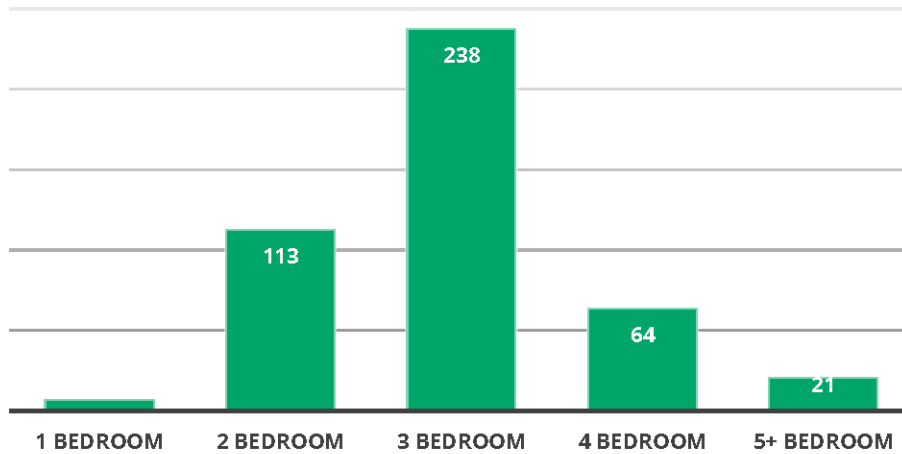
**Lebanon Home Sales by Price Range Since 2022**



Given Lebanon’s smalltown atmosphere, modest housing values, and the presence of a hospital and other healthcare facilities, it seems a potential market may exist for attracting retirees from outside of the community. Also, the pandemic accelerated the trend for the remote workforce. Rural communities are capitalizing on this trend by providing a desirable quality of life for a growing workforce that can now decide where to live, separate from where the job originates.

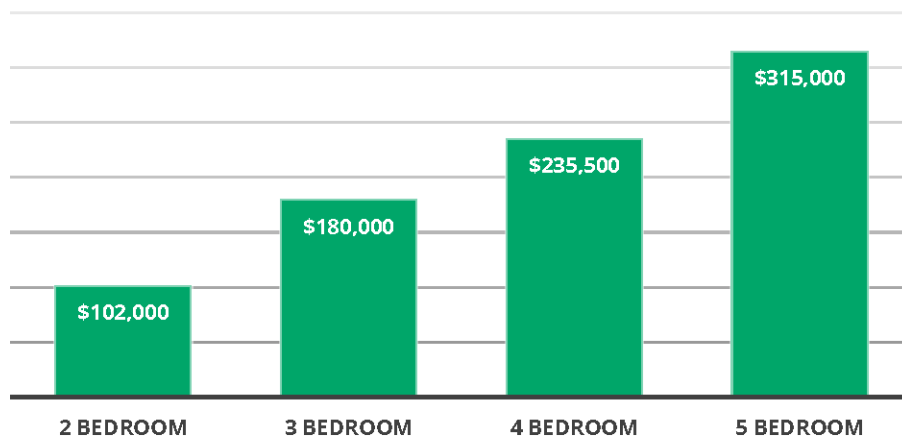
The bar chart below illustrates home sales in Lebanon since 2022 by number of bedrooms. Three-bedroom homes accounted for 53.7 percent of all homes sales, totaling 238 sales. Two-bedroom homes accounted for the second highest share at 25.5 percent, or 113 home sales. A total of 64, four-bedroom homes were sold since January 2022, equating to 14.4 percent of all home sales.

**Lebanon Homes Sales by Number of Bedrooms  
1/1/2022 to 7/31/2023**



Since January 1, 2022, 2-bedroom homes sold for \$26,500 to \$305,000, at a median price of \$102,000. Three-bedroom homes sold for \$20,000 to \$670,000, at a median price of \$180,000. The median sales price for 4-bedroom homes was \$235,500, ranging from \$15,000 to \$555,000. Five-bedroom homes sold for a median price of \$315,000, ranging from \$60,000 to \$1.1 million.

**Lebanon Median Home Sales Price by Number of  
Bedrooms; 1/1/2022 to 7/31/2023**



Active new home construction is concentrated within the southwest and northeast quadrants of Lebanon. Legacy Homes is under construction on the initial phase of the 134-lot Legends Trails subdivision located within the far northwest quadrant of Lebanon immediately west of Edna Atchley Park. A walking path connects Legends Trails with the adjacent park. Building lots on the 68-acre tree covered property range in size from 0.27 acres to 1.18 acres. Ten 3-bedroom models are available. Eight homes have been completed with three homes currently under construction priced in the \$300,000 to \$400,000 range.

Legacy Homes is also building 2-story, 3 bedroom/2.5 bath townhomes on Howard Drive east of Elm Street. The project is designed for six buildings totaling 24 townhomes. Three buildings with four

townhomes each have been completed with a 6-unit building now under construction. The 1,640 square foot townhomes are available for lease at \$1,400 per month.

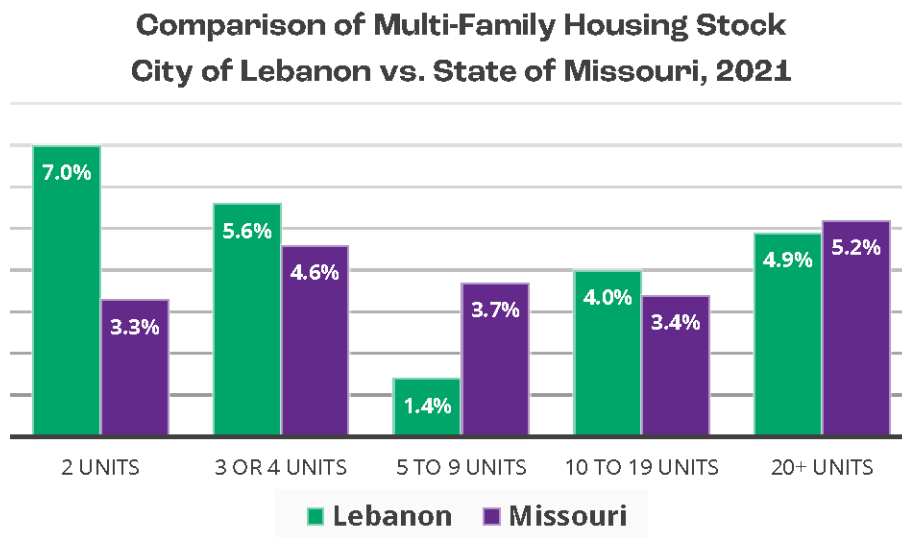
New home construction is also active within an existing subdivision on the west side of Beck Lane on Jessalinn Drive with new homes generally priced from \$200,000 to \$250,000.

According to a local builder a market exists for new starter homes priced starting at \$175,000 with 1,000 to 1,200 square feet with no garage. City incentives have prompted considerable infill housing within older neighborhoods built in the 1930's and 1940's with continued construction activity expected.

### **Rental Housing Market**

According to the *American Community Survey 2021*, Lebanon's housing stock totaled 6,628 dwelling units, of which 22.9 percent, or 1,516 dwelling units were in multi-unit structures. By comparison, multi-family housing accounts for 20.2 percent of the statewide housing stock.

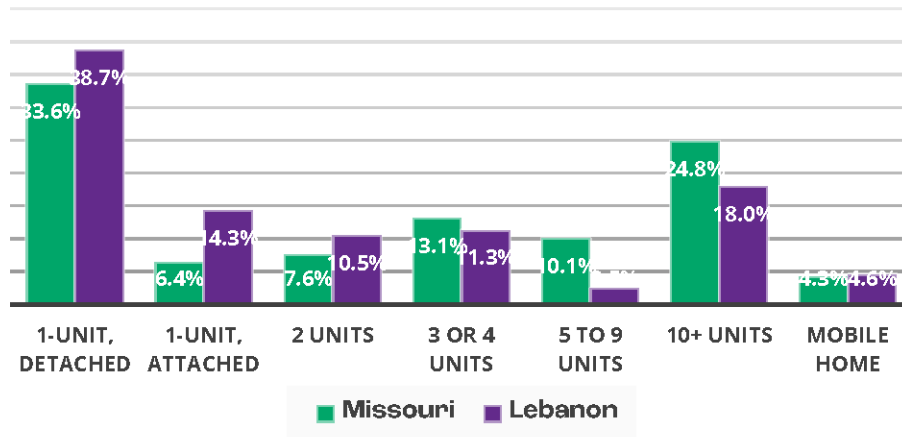
Large-scale properties with 20 or more dwelling units account for 4.9 percent of Lebanon's housing stock, compared to 5.2 percent statewide. Duplexes account for 7.0 percent of the Lebanon housing stock compared to 3.3 percent for Missouri. Properties with 3 to 9 housing units account for 7.0 percent of Lebanon's housing stock, compared to 8.3 percent statewide.



According to the U.S. Census Bureau, as of 2021, Lebanon's inventory of occupied rental housing totaled 2,937 dwelling units, or 49.1 percent of the city's occupied housing stock. By comparison, rental housing accounts for 31.2 percent of Missouri's occupied housing stock. The well above average rate of renter-occupied housing in Lebanon may be a function of the below average household income levels.

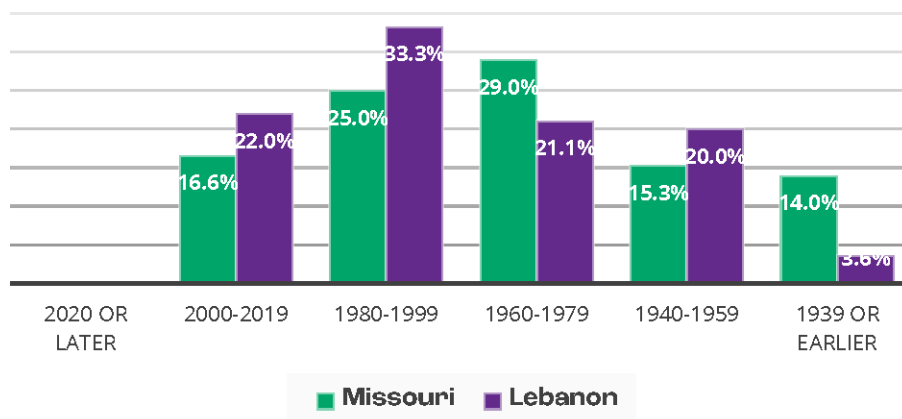
Large-scale apartment properties with 10 or more units account for 18.0 percent of Lebanon's occupied housing stock, compared to 24.8 percent statewide. Duplexes and properties with 3 to 4 dwelling units both account for 21.8 percent of Lebanon's occupied housing stock, compared to 20.7 percent statewide.

### Comparison of Renter-Occupied Housing City of Lebanon vs. State of Missouri, 2021



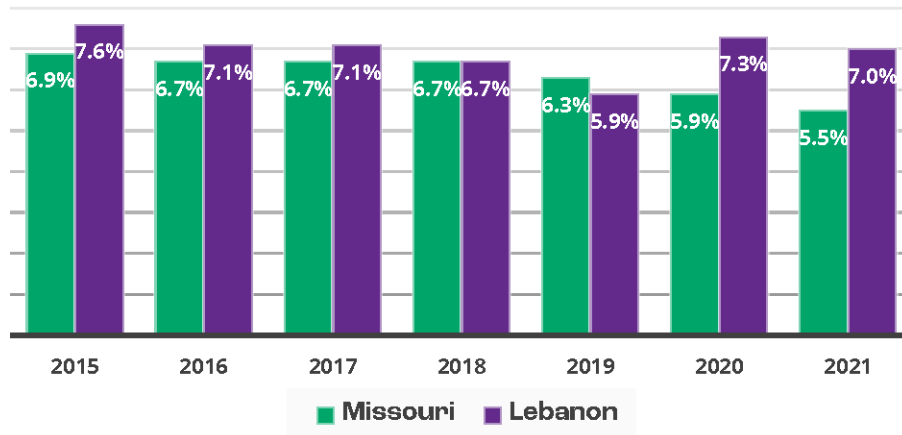
A shortage of quality rental properties exists in Lebanon with single family homes accounting for the largest share of occupied housing stock. An estimated 54.4 percent of Lebanon's rental housing was built between 1960 and 1999 with 23.6 percent prior to 1959. As a result, much of Lebanon's rental housing is old and lacks the modern design and amenities of newer properties.

### Rental Housing by Year Built City of Lebanon vs. State of Missouri, 2021



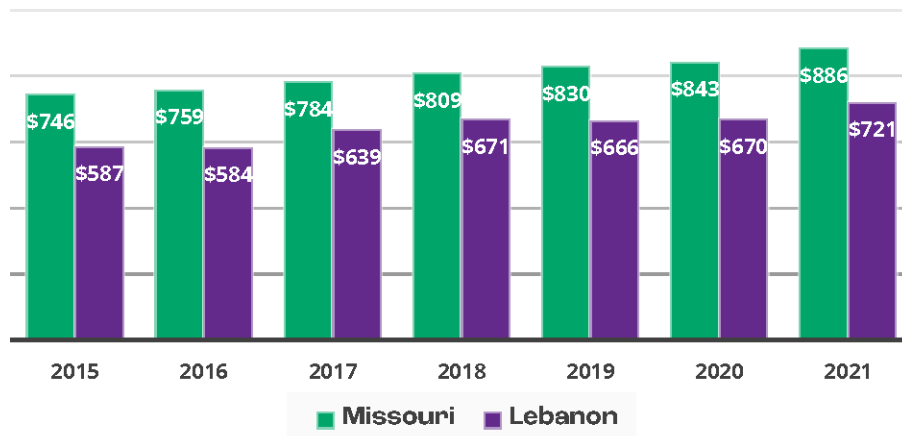
According to the *American Community Survey*, from 2016 through 2019, despite exceeding the statewide norm, the Lebanon rental housing market operated at a healthy vacancy rate at or below market equilibrium, with annualized rates ranging from 5.9 percent to 7.1 percent. Lebanon's rental housing vacancy rate increased to 7.3 percent in 2020, before moderating slightly in 2021 at 7.0 percent. By comparison, Missouri's rental housing vacancy rate was 5.5 percent in 2021.

### Comparison of Rental Housing Vacancy Trends City of Lebanon vs. State of Missouri



Since 2015, Lebanon's median monthly housing rent significantly lagged the statewide median. From 2015 through 2021, Lebanon's median monthly housing rent increased 22.8 percent, reaching \$721 by 2021. Missouri's median rent in 2021 of \$886 per month was 22.9 percent above the median for Lebanon. Lebanon's well below statewide rents are attributed to the age and lower quality of the rental housing stock.

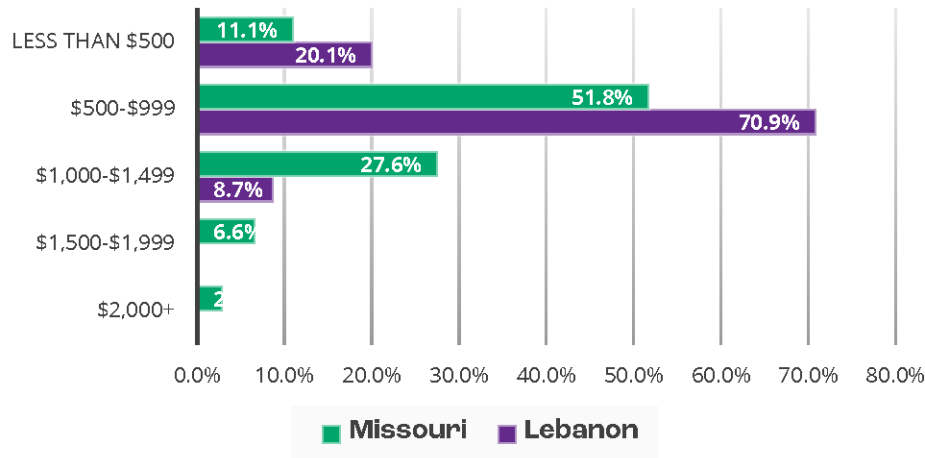
### Median Monthly Housing Rent Trends City of Lebanon vs. State of Missouri



Of Lebanon's occupied rental housing units, 20.1 percent rented for less than \$500 per month compared to 11.1 percent statewide. This disparity in rents suggest Lebanon supports a larger need for affordable and income-based rental housing.

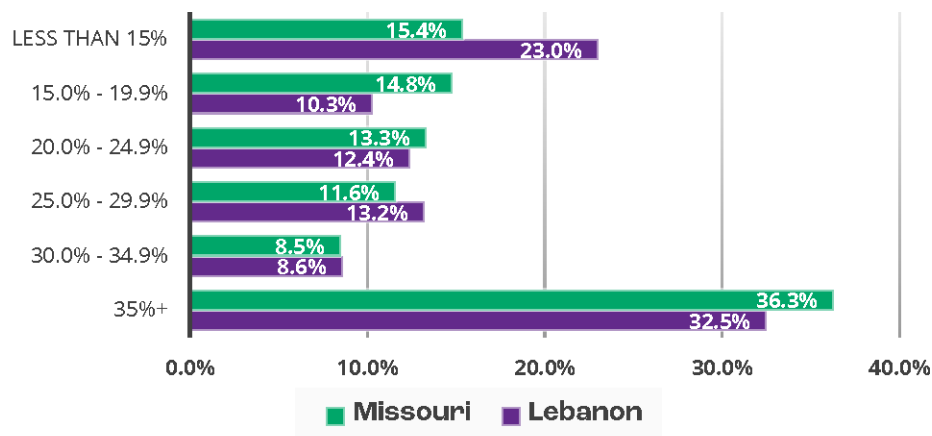
An estimated 70.9 percent of the Lebanon rental housing stock garner rents of \$500 to \$999 per month, compared to 51.8 percent statewide. Housing units renting for \$1,000 to \$1,499 per month account for just 8.7 percent of Lebanon rental market while 0.3 percent of the housing stock renting for excess of \$2,000 per month.

### Monthly Housing Rents Lebanon vs. Missouri



Housing stress occurs when the cost of housing (either as rental or as a mortgage) is high relative to household income. A household spending 30 percent or more of its income on housing can be considered under housing stress. The gross rent for 41.1 percent of renter households in Lebanon accounts for 30 percent or more of total income compared to 44.8 percent statewide, suggesting a need for additional affordable and income-based housing in both Missouri and Lebanon.

### Gross Rent as a % of Household Income City of Lebanon vs. State of Missouri



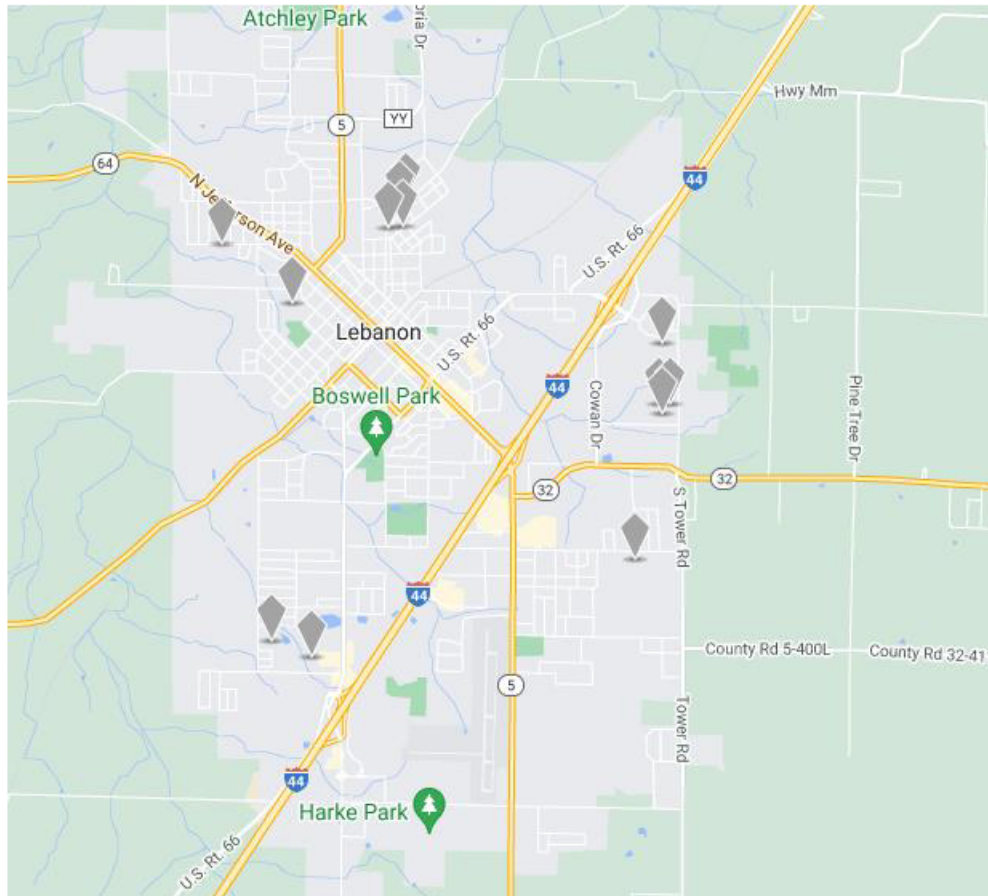
Much of Lebanon's rental housing is older and lack the amenities of modern rental housing. Rents for quality rental properties in Lebanon is priced at the high end of the range and in many cases are equal to that of a mortgage payment for an entry-level home. With continued population growth forecast, the need exists in Lebanon for additional rental housing.

Over the past three years, one multi-family property totaling 40 rental units sold in Lebanon. On July 8, 2021, the Lebanon Sundance Apartments sold for \$1.8 million, equating to \$45,000 per dwelling unit. The Lebanon Sundance Apartments are a Low-Income Housing Tax Credit project.

## **Large-Scale Apartment Properties**

Current rental housing market conditions in Lebanon, Missouri were identified by conducting a search on CoStar for large-scale apartment properties of 20 or more dwelling units. According to CoStar, Lebanon has 14 large-scale apartment properties totaling 681 dwelling units. Four apartment properties totaling 180 dwelling units are market-rate and ten income-based properties include 242 family units and 259 senior housing units.

### **Lebanon, Missouri Large Apartment Properties**



The table on the following page summarizes operating trends for large-scale apartment properties in Lebanon. Since 2010, three new large-scale apartment properties were built in Lebanon, totaling 82 rental units.

Since 2019, the apartment properties have operated at a health vacancy rate below market equilibrium. By year-end 2021, just 33 vacant apartments were available for lease yielding a vacancy rate of 5.0 percent. At year-end 2022, the overall apartment vacancy rate stood at 7.0 percent. The lack of vacant apartments available for immediate occupancy places a constraint on households seeking to move to Lebanon or existing residents seeking a better apartment. Over the past decade the average rent for large-scale apartment properties in Lebanon increased by 45.6 percent, reaching \$664 per month by the third quarter 2023. Despite the strong growth the average rent remains well below the state-wide average.

## Lebanon, Missouri Apartment Market Trends

Year	# of Properties	Inventory # of Units	Net Absorption	Vacant Units	Vacancy Rate	Average Rent/Mo.
2010	11	599	7	65	10.9%	\$456
2011	11	599	6	59	9.8%	\$463
2012	12	623	26	57	9.1%	\$469
2013	12	623	0	57	9.1%	\$474
2014	12	623	2	55	8.8%	\$481
2015	12	623	3	52	8.3%	\$487
2016	12	623	1	51	8.2%	\$490
2017	12	623	2	49	7.9%	\$498
2018	13	659	27	58	8.8%	\$505
2019	13	659	11	47	7.1%	\$513
2020	13	659	11	36	5.5%	\$525
2021	13	659	3	33	5.0%	\$565
2022	13	659	-13	46	7.0%	\$659
2023 Q3	14	681	8	60	8.8%	\$664

Source: CoStar.

### **Market-Rate Rental Housing**

Three large-scale, market-rate apartment properties operate in Lebanon totaling 158 rental units.

The 102-unit Britli Estates built in 2010 is the largest market-rate apartment property in Lebanon. The property features 68 two-bedroom apartments at a rent of \$895 per month and 34, three-bedroom units at rents of \$995 to \$1,250 per month. Community amenities are limited to a playground.

The Highlands is a 32-unit property located at 1525 Tower Road. The property features one-bedroom units renting for \$431 per month and two-bedroom units renting at \$571 per month. Community amenities include a playground and laundry facilities. At the time of this study The Highlands was fully leased.

The 24-unit Lebanon Oaks Apartments are located at 601 South St. Louis Street. The property offers 1- and 2-bedroom apartments and is currently fully leased.

## Lebanon Market-Rate and Income-Based Rental Apartment Properties

Apartment Property	Year Built	# of Units
<b>Market-Rate Properties</b>		
Britli Estates	2010	102
Lebanon Oaks Apartments	1994	24
The Highlands	1998	32
<b>Income-Based Family Housing</b>		
Lebanon Sundance Apartments	1999	40
The Timbers	1973	130
Timber Creek Estates	2009	36
Lebanon Heights		36
<b>Income-Based Senior Housing</b>		
750 Main Street	1991	24
Monroe Estates	1980	74
Tower Village	2018	36
Lebanon Senior Apartments 1	2008	36
Lebanon Senior Apartments 2	2012	24
Vernon Heights and Madison Manor	2023*	65
<b>Grand Total Units</b>		<b>659</b>

Notes: \*Denotes property renovated in 2023.

### **Income-Based Rental Housing**

An estimated 17.5 percent of Lebanon households earn less than \$15,000 per year compared to 11.0 percent statewide, indicating the need for income-based rental assistance. Affordable housing assistance in Lebanon takes the form of Section 42 Low-Income Housing Tax Credit Program and the Department of Housing and Urban Development's ("HUD") subsidized housing through its Section 8 Housing Choice Voucher Program. Four income-based family rental properties totaling 242 rental units operate in Lebanon, offering reduced rents to low-income households.

Seniors 65+ years of age account for 18.3 percent of Lebanon's total population, compared to 14.0 percent statewide. Six income-based senior rental communities operate in Lebanon totaling 259 rental units.

The Lebanon Housing Authority provides housing assistance to low-income residents through management of programs such as Low Rent Public Housing and the Housing Choice Voucher Program – Section 8. These programs are income-based, and the eligibility guidelines are set by

HUD. The Housing Choice Voucher Program is the federal government's program for assisting very low-income families, the elderly, and the disabled to afford decent, safe, and sanitary housing in the private market. Since housing assistance is provided on behalf of the family or individual, participants find their own housing, including single-family homes, townhouses, and apartments.

The Lebanon Housing Authority provides affordable housing for up to 162 families and senior/disabled households through its Public Housing program. Households with a Section 8 Housing Choice Voucher managed by this housing authority must rent within its jurisdiction.

Given the large low-income and senior populations in Lebanon and the modest inventory of income-based family and senior rental units, it is concluded that a significant market supply imbalance exists.

In response to an RFP from the City of Lebanon, the partnership between Bridge Builders and AHDVS, LLC is planning to develop an affordable rental housing community in Lebanon featuring 50 single-family homes and a clubhouse featuring offices, media room, fitness center, club room, and multi-purpose room. The city is partnering with the developers by providing site infrastructure to the site. A second phase consisting of an additional 50 single-family homes is being considered given the high level of demand for income-based rental housing in Lebanon.

A disproportionate amount of the nation's occupied substandard housing is in rural communities. Several hurdles exist in developing financially feasible income-based rental housing in rural communities such as Lebanon.

1. Funding for new income-based projects is difficult to obtain. Reasonable operating expenses and rental comps are difficult to find in rural communities that support financially feasible new development.
2. The Community Reinvestment Act (CRA) requires the Federal Reserve and other federal banking regulators to encourage financial institutions to help meet the credit needs of the communities in which they do business, including low- and moderate-income (LMI) neighborhoods. Major banks generally do not have an appetite for low-income housing tax credits in rural communities for the funding of new development. Therefore, boutique lenders or investors are needed to finance new development with the cost of money higher in rural communities. Cities may be required to assist in closing the gap in project financing through such means as providing infrastructure and waiving fees.
3. Competent general contractors are difficult to find in rural communities and the cost of labor and materials drive up construction costs. General contractors are key to a project's success and it's best if they are a partner with the developer. The use of fee contractors is difficult when building income-based housing in rural areas.

## **Forecast Housing Need**

The *Lake of the Ozarks Regional Housing Study* published in February 2022 estimated that the City of Lebanon had a need for 347 new housing units in 2020 with an additional 366 housing units needed by 2025. Residential housing need estimates for the City of Lebanon through the year 2040 were forecast based on anticipated demographic and economic trends for the community. Key input to the model includes historical patterns in annual residential building permit activity and projected population and household growth, average household formation rates, households by income levels, and population by age.

Demographic characteristics and historic population growth trends for Lebanon were provided by the U.S. Census Bureau and Esri Business Analyst. Housing characteristics for Lebanon were provided by the *American Community Survey*. Population growth projections for Lebanon were generated by Canyon Research Southwest based on historic growth patterns, forecast employment growth, availability of developable land, and economic development factors.

Esri Business Analyst estimated Lebanon's current residential housing stock at 6,966 dwelling units, operating at an overall occupancy rate of 87.6 percent. The occupied housing stock included 3,490 owner-occupied units (55.7%) and 2,772 renter-occupied units (44.3%). A total of 704 vacant housing units were reported. Lebanon's current average household size is 2.38 persons.

Esri Business Analyst estimated Lebanon's 2023 population at 15,282 residents. From 2023 to 2040, Lebanon's population is forecast to increase by 2,074 to 2,956 residents, generating the need for additional housing units.

Supportable residential housing absorption through 2040 will be a function of resident population growth and latent demand while income levels and age composition will dictate the type and mix of housing product.

## **Housing Need from Population Growth**

Net population and household growth are the largest single drivers of the need for new housing units. From 2023 through 2040, the City of Lebanon population is forecast to increase by 2,074 to 2,956 new residents. The City of Lebanon's average household size is 2.38 persons. The City of Lebanon's forecast population growth through 2040 is estimated to yield an estimated 871 to 1,242 new households and occupied housing unit.

## **Latent Housing Need**

Another housing needs component considers the number of units a market requires to offer balanced market conditions. Vacant housing units are necessary to accommodate the turnover of the housing stock as people move for family, work-related, or financial reasons. Latent demand occurs when the inventory of available housing is severely constrained.

A housing market operating at equilibrium generally supports a 92 percent to 95 percent occupancy rate. Healthy markets require approximately 5 percent to 8 percent of the housing stock to be available to allow for inner-market mobility and encourage competitive housing prices and rental rates. Markets with vacancy rates below a healthy rate often suffer from escalating home values and

rents, minimal tenant turnover, residents being forced into housing situations that do not meet their housing needs, and the inability of nonresidents to enter the market. Esri Business Analyst estimated that in 2023 a total of 704 residential housing units were vacant in Lebanon, equating to an overall occupancy rate of 89.9 percent.

Lebanon's current residential housing stock totals 6,966 dwelling units, of which 6,262 dwelling units are occupied. Through 2040, population growth is anticipated to result in the need for 871 to 1,242 additional housing units, bringing the total inventory to 7,133 to 7,504 occupied housing units.

At market equilibrium occupancy rate of 93 to 95 percent, by 2040 Lebanon's housing stock would total 5,740 to 5,768 dwelling units, of which 281 to 419 dwelling units would be vacant and available for sale or rent. Given the current inventory of 704 vacant housing units in Lebanon, no latent housing need is anticipated. **However, this conclusion assumes the vacant housing stock is in good condition and suitable for occupancy. Given the large inventory of older homes in Lebanon the potential exists that a portion of the vacant housing stock is substandard.**

### **Total Housing Need**

From 2023 through 2040, the City of Lebanon's forecast population growth is anticipated to create the need for an estimated 871 to 1,242 new housing units. Lebanon's current mix of occupied housing units is 55.7 percent owner-occupied and 44.3 percent renter occupied. Given the city's population age composition, household income levels, and existing housing stock, from 2023 through 2040 the housing need is estimated to be segmented 55 percent owner-occupied and 45 percent renter occupied. Therefore, by 2040 the mix of new housing inventory is estimated at 479 to 683 homeownership units and 392 to 559 rental units.

The City of Lebanon's mix of future housing need is best determined by evaluating the city's population demographics with that of the various housing life-cycle stages. Emphasis is placed on age, education, and income.

Entry-level householders are generally single or couples without children in their early 20's and often prefer to rent basic, inexpensive apartments. According to Esri Business Analyst, residents 15 to 24 years of age account for 11.8 percent of the Lebanon population with those 25 to 34 years of age accounting for 12.9 percent. Individuals with high school degrees or less are more likely to be renters than homeowners. An estimated 54.9 percent of Lebanon residents are high school graduates or less. Lebanon population demographics provide a strong market for entry-level for-sale and rental housing.

An estimated 43.7 percent of households in Lebanon earn less than \$35,000 annually with 28.2 percent of households earning less than \$25,000. These households tend to be perpetual renters with the lowest income households potentially qualifying for some form of housing assistance. Lebanon's resident profile suggests an additional need for rental housing with an emphasis on affordable and income-based product. A sizable market exists for housing priced under \$100,000. First-time homebuyers and move-up renters are usually married or cohabitating couples in their mid-20's or 30's, some with children, but most are without children. These individuals prefer to purchase modest-priced single-family homes or rent more upscale apartments. An estimated 12.9 percent of Lebanon residents are 25 to 34 years of age with 9.6 percent of residents attaining an associate degree and 12.2 percent of residents possess a bachelor's degree. An estimated 12.3 percent of households earn \$35,000 to \$49,999 annually and 19.4 percent of households earn

\$50,000 to \$74,999 annually. The City of Lebanon possesses a sized market for homes priced from \$100,000 to \$200,000 and a limited market for move-up renters.

Move-up homebuyers are typically in their late 30's to 40's, married with children. There is a total of 34.0 percent of households in the City of Lebanon with children. An estimated 12.9 percent of Lebanon residents are 35 to 44 years of age with 12.2 percent of residents attaining a bachelor's degree and 5.0 percent of residents possessing a graduate or professional degree. An estimated 13.8 percent of households earn \$75,000 to \$99,999 annually and 10.8 percent of households earn \$100,000 or more annually. Lebanon possesses a modest market for housing priced at \$200,000 and more.

The table below summarizes the forecast housing mix by owner-occupied and renter-occupied units and by product type.

### **Forecast Housing Need by Product Type Lebanon, Missouri; 2023-2040**

	2023 Estimate		2040 Forecast	
	# of Units	# of Total	# of Units	# of Total
Total Housing Units	6,966		871 - 1,242	
Occupied Housing Units	6,262			
Home Ownership Units	3,490	55.7%	474 - 683	55.0%
Rental Units	2,772	44.3%	392 - 559	45.0%
Vacant Housing Units	704			
2021 Housing Inventory				
Single Family Detached	4,241	60.4%	566 - 807	65.0%
Single Family Attached	487	7.3%	9 - 12	1.0%
2 to 4 Units	829	12.6%	87 - 124	10.0%
5 to 9 Units	96	1.4%	35 - 50	4.0%
10 or More Units	591	8.9%	174 - 248	20.0%

Source: U.S. Census and Canyon Research Southwest, Inc.

Through 2040, the market share for new single-family housing in Lebanon is expected to increase slightly relative to the trends over the past twenty years. The market share of 2- to 9-unit multi-family structures is anticipated to remain stable with large-scale apartment development becoming more prevalent.

## **Residential Site Evaluation**

Lebanon was evaluated for the ability to facilitate development of single-family and multi-family residential housing based on the following site criteria: availability of infrastructure and developable land; accessibility; and visibility and exposure.

Single-family home subdivision and multi-family housing development within Lebanon is best suited within the southwest, southeast, and northeast quadrants of the city with priority on land adjacent or near existing urban uses and infrastructure, thus minimizing the cost of constructing off-site infrastructure. Upscale new housing is best located in the City's northwest quadrant that features tree covered rolling topography. There appears to be a market for a subdivision with amenities such as a clubhouse, playground, and walking trails. Entry-level housing is best suited along Beck Lane in southwest Lebanon. Small scale infill housing within the mature portions of the city should also be encouraged.

Prospective single-family home subdivision development sites in Lebanon include:

1. Lebanon's far northwest quadrant west of Highway 5 and north of Keller Drive
2. North side of Millcreek Road east of Boswell Elementary School
3. West side of Beck Lane in Lebanon's southwest quadrant
4. Vacant land on the west side of Tower Road and Mountrose Street
5. Vacant land on the south side on Mountrose Street east of Hillsdale Street
6. Vacant land on the east side of South Jefferson Avenue north of Fremont Road
7. Vacant land on the south side of Fremont Road west of South Jefferson Avenue

Future multi-family development is best suited along major arterial streets and adjacent to commercial hubs. Suitable development sites include the following locations:

1. Vacant land located immediately east of Lowe's and Walmart
2. Northwest corner of Highway 32 and Cowan Drive
3. Vacant land at the northeast corner of South Jefferson Avenue and Jerald Avenue
4. Vacant land on the east side of Beck Lane south of Utah Street
5. Vacant land at the northeast corner of Fremont Road and Morgan Road
6. Vacant land at the northwest corner of Millcreek Road and Carmeco Road
7. Small-scale multi-family development is best suited on infill sites in the older, mature neighborhoods surrounding downtown Lebanon.

## STUDY CONCLUSIONS

Based on the findings of the *Economic and Market Analysis* the following topics were addressed 1) the need through 2040 in Lebanon for additional commercial and industrial space as well as residential housing units and 2) citywide land use patterns and development opportunities.

### **Forecast Commercial, Industrial and Residential Need**

Retail, office and industrial space and residential housing unit need was forecast for Lebanon, Missouri through the year 2040. Market forces driving future need for commercial space and housing include the growth in employment, population, and income along with trends in average space per employee, household size, and household composition.

By 2040, Lebanon's increased population is forecast to generate additional retail sales capable of supporting 182,000 to 255,000 square feet of new retail space.

From 2023 through 2040, office-related job growth in Lebanon is projected to support the need for 37,000 to 62,000 square feet of professional office space with population growth yielding the need for 20,900 to 28,500 square feet of medical office space.

By 2040, industrial job growth in Lebanon is projected to support the need for 394,000 to 710,000 square feet of owner-occupied and speculative industrial space.

Through 2040, Lebanon's forecast population growth is estimated to generate the need for 871 to 1,242 residential dwelling units.

### **Forecast Retail, Office, Industrial and Residential Need Lebanon, Missouri; 2023 to 2040**

		Growth Population	2023-2040 Jobs		Net Conservative	Gain Optimistic
Retail		2,074 – 2,956			182,000 SF	255,000 SF
Office			115 - 196		57,900 SF	90,500 SF
Industrial			287 - 524		394,000 SF	710,000 SF
Housing		2,074 – 2,956			871 Units	1,242 Units
Ownership Units					474 Units	683 Units
Rental Units					392 Units	559 Units

Assuming an average floor-area-ratio ("FAR") of 0.2 to 0.4 for the retail, office and industrial space and an average density of 4.0 to 5.0 dwelling units per acre for single-family housing and 15 dwelling units per acre for multi-family housing, a through 2040 the City of Lebanon is estimated support the development of approximately 180 to 216 acres of land under the conservative scenario and 261 to 317 acres under the optimistic scenario.

**Forecast Land Area Absorption in Acres  
Lebanon, Missouri; 2023 to 2040**

<b>Land Use</b>	<b>Conservative Scenario</b>	<b>Optimistic Scenario</b>
Retail	18 – 21	21 – 29
Office	4 – 5	7 – 8
Industrial	23 – 26	41 – 47
Residential	135 – 164	192 – 233
<b>Total Acres</b>	<b>180 – 216</b>	<b>261 – 317</b>

**Land Use Patterns and Development Opportunities**

Based on the study findings and future demand projections, future development opportunities in Lebanon, Missouri for retail, office, industrial, and housing have been identified.

Given the City of Lebanon’s infrastructure, topography, highway access, and existing land use patterns, over the next twenty years urban expansion will favor the southeast, southwest, and northwest quadrants of the city. Jefferson Avenue will remain as Lebanon’s dominant corridor for commercial activity with the Interstate 44 corridor continuing to evolve as an employment center. The City’s northwest quadrant will remain as the leading location for upscale housing, with the southern portion of the city along Beck Lane, Fremont Road, and Tower Road continuing to accommodate new entry-level and move-up single-family housing. Downtown will continue to support redevelopment activity including retail, office, mixed-use, and infill housing.

South Jefferson Avenue will continue to serve as Lebanon’s dominant retail growth corridor. The recommended future retail development sites are positioned within the corridor’s existing hub at MO 32 and Jefferson Avenue.

1. Approximate 10 acres at the southeast corner of MO 32 and Jefferson Avenue
2. Vacant land east of Lowe’s and Walmart between MO 32 and Bland Road
3. Outparcels within the Lebanon Marketplace
4. Vacant parcel at the southwest corner of Evergreen Parkway and Jefferson Avenue
5. Vacant parcel between Evergreen Parkway and Bland Road west of Jefferson Avenue
6. Vacant parcel at the northeast corner of Jefferson Avenue and Jerald Avenue

Other prospective commercial development sites are located along the Interstate 44 corridor, U.S. Route 66, MO 32, and Lynn Street:

1. Vacant land west of the Interstate 44 from the Elm Street interchange south to Equestrian Road
2. Vacant land on the east side of Interstate 44 north of the Ivey Road alignment
3. Vacant land at the southwest corner of Interstate 44 and Millcreek Road
4. West side of Morgan Road south of Slate Street

5. Vacant land at the northwest corner of Slate Street and Boulder Avenue
6. Northwest corner of MO 32 and Cowan Drive
7. Vacant land on the south side of MO 32 between Cowen Drive and Tower Road
8. East side of Lynn Street from Keller Road north to city limits
9. West side of Lynn Road north of Goldenwood Road

Elm Street also serves as a commercial corridor. To promote revitalization of the Elm Street corridor the north and south segments should be designated as redevelopment districts. Proposed redevelopment district boundaries for the north end of Elm Street extend from Mills Drive north to the Interstate 44 interchange and to the south from Bland Road south to the Interstate 44 interchange. Public funding in the form of Tax Increment Financing ("TIF"), Community Improvement District ("CID"), or Transportation Development District ("TDD") should be made available to assist property owners to invest in their properties.

Eighty-two businesses operate along Commercial Street in downtown Lebanon, including 53 retail businesses and 29 personal and business services. Prominent retail businesses include hair salons and barbers, restaurants, boutiques and clothing stores, photo studios, and dance studios. Office tenants include law firms, insurance agents, financial planners, banks, accountants, title companies, tax preparers, bail bonds, and surveyors.

Emphasis should be placed on strengthening the 3-block portion of Commercial Street from Van Buren Avenue and Madison Avenue which consists primarily of one-story commercial buildings. An increased inventory of commercial space, businesses, and residents could be accommodated downtown through infill development of under-utilized properties.

Downtown will continue to support redevelopment activity featuring retail, office, mixed-use, and infill housing. Future efforts should focus on providing entertainment, community events, and a public gathering place.

Creating additional residential housing units downtown should be a priority. Potential housing formats include upper floor apartments as part of mixed-use development along Commercial Street and infill single-family and small-scale multi-family housing on vacant land and under-utilized properties along 2<sup>nd</sup> Street.

The Commercial Street corridor in downtown Lebanon is ideal for future retail and mixed-use development. The recommended redevelopment sites listed below consist of underutilized properties that can support more intensive development.

1. Northeast corner of Commercial Street and Van Buren
2. Northwest corner of Commercial Street and Van Buren
3. Freestanding building at southeast corner of Commercial Street and Jackson Avenue
4. One-story commercial at southeast corner of Commercial Street and Jefferson Avenue
5. Three-story building at the northeast corner of Commercial Street and Adams Avenue
6. Freestanding building at the southwest corner of Commercial Street and Washington

Generating employment opportunities should be a priority of the Lebanon Comprehensive Plan as jobs support population growth and economic development. Expanding the high school curriculum to include more industrial trades would assist in fostering a more diversified economy for Lebanon. Future industrial development in Lebanon is best suited along the Interstate 44 corridor.

Warehouse, logistics, manufacturing, and industrial flex uses would be suitable for the Interstate 44 interchanges at Millcreek Road, Jefferson Avenue, and Elm Street. Given existing development patterns the vacant land within the City of Lebanon that is recommended to be designated for future industrial use includes:

6. Vacant land at the northeast corner of Cowan Drive and Millcreek Road
7. Vacant land on the north side of Millcreek Road west of Carmeco Road
8. City-owned industrial park at U.S. Route 66 and Wyota Drive
9. Interstate 44 corridor north of the city limits
10. Southwest corner of Commercial Street and Beck Land south to Bland Road alignment

Continued population growth will fuel the need for additional professional office space in Lebanon. The presence of Mercy Hospital and Lake Regional Lebanon Campus will generate the future need for additional medical office buildings along Cowan Drive. Lebanon should promote itself as a regional medical destination. The following properties in Lebanon were identified as potential professional and medical office development sites.

1. Under-utilized properties along Commercial Street in downtown Lebanon
2. Under-utilized properties along Jefferson Avenue from Commercial Street west to 7<sup>th</sup> Street
3. Vacant parcel between Evergreen Parkway and Bland Road west of Jefferson Avenue
4. Vacant land on the east side of Cowan Drive from Copeland Drive north to Millcreek Road
5. Vacant land surrounding the Mercy Hospital Lebanon
6. Vacant land on the east side of Cowan Drive from Copeland Drive north to Millcreek Road

Given Lebanon's smalltown atmosphere, high quality of life, modest housing values, and ample healthcare facilities, it seems a potential market may exist for attracting empty nesters and retirees from outside of the community. Also, the COVID-19 pandemic accelerated the trend for working remotely. Rural communities are capitalizing on this trend by providing a desirable quality of life for a growing workforce that can now decide where to live separately from where the job originates.

Lebanon's northwest quadrant will remain as the leading location for upscale single-family housing, with the southern portion of the city continuing to support new entry-level and move-up for-sale housing.

To foster future economic development and population growth in Lebanon a wider mix of both owner-occupied and rental housing products is needed suitable for accommodating a broad population and labor force. This could be accomplished through renovation of the existing older housing stock, new small-scale infill housing, and development of greenfield parcels at the periphery of the city with street access and utility services at or near the property. A more diversified housing stock can be achieved by focusing on providing additional income-based family and senior rental housing, for-sale and rental infill housing, entry-level and move-up for-sale housing, and market-rate rental housing.

Entry-level, for-sale housing and market-rate apartments are needed to support a workforce for such business sectors as manufacturing, logistics, retail, and personal services. Upscale for-sale

housing is needed to retain and attract upper management, entrepreneurs, physicians, and other high-income households.

Challenges of providing affordable for-sale housing in Lebanon include below average household income levels, lack of skilled construction trades, and the higher costs of labor and materials relative to metropolitan areas. These factors make it difficult for builders to provide entry-level housing priced under \$250,000. The city could consider a variety of options to assist in supporting entry-level, for-sale housing, including funding public utility extensions, waiving utility connection fees and building permit fees, and lowering the subdivision street design requirements for those subdivisions targeting entry-level housing.

Affordable and income-based housing could be provided through infill development and the rehabilitation of existing housing within older, established neighborhoods in Lebanon. Existing neighborhoods possess street improvements and utilities services, thus reducing site costs and improving the potential to support entry-level, for-sale housing.

Potential infill housing types include detached single-family homes, attached twin homes, townhomes, and small multi-family properties. A variety of economic incentives could be offered to stimulate new infill housing. Possible examples include tax abatement, public financing such as tax increment financing, waiving permit and utility connection fees, city-sponsored land banking, and public-private partnerships to assist in infrastructure improvements.

Downtown Lebanon could benefit from the construction of new rental apartments with potential sites including vacant lots and under-utilized properties along 2<sup>nd</sup> Street. New housing at the periphery of downtown would create a more vibrant urban environment and provide customers for downtown businesses.

The city's high rate of households with annual income of less than \$35,000 generates a strong need for both market-rate and income-based rental housing as these households are generally chronic renters. The need for rental housing is evident in the fact that renter-occupied housing accounts for 49.6 percent of Lebanon's occupied housing stock. Increased emphasis is needed to provide additional market-rate and income-based rental housing. Doing so will support a labor force needed to facilitate economic development.

Lebanon's large empty nester population ages 45 to 64 years and senior population 65 years and older supports the growing need for market-rate senior apartments. Lebanon's large population earning less than \$25,000 annually also suggests a strong need for income-based senior apartments.

Multi-family residential development sites are best located along major arterial corridors, close to jobs and retail, and infill locations within mature neighborhoods. Prospective multi-family residential development sites in Lebanon include:

1. Vacant land east of Jefferson Avenue north of Allison Drive
2. Vacant land east of Jefferson Avenue south of Allison Drive
3. Vacant land on the east side of Beck Lane south of Utah Street
4. East side of Beck Lane between Ice Cream Way and Evans Road
5. Vacant land at the southeast corner of Morning Star Drive and New Buffalo Road

6. Small-scale multi-family development is best suited on infill sites in the older, mature neighborhoods surrounding downtown Lebanon.

Continued new single-family housing construction should be supported at the periphery of the city that is currently serviced with roads utilities and where existing single-family subdivisions are present. The northwest and southern portions of Lebanon will continue to be the dominant location for new home construction. Prospective single-family home subdivision greenfield development sites in Lebanon include:

1. Lebanon's far northwest quadrant west of Highway 5 and north of Keller Drive
2. North side of Millcreek Road east of Boswell Elementary School
3. West side of Beck Lane in Lebanon's southwest quadrant
4. Vacant land on the west side of Tower Road and Mountrose Street
5. Vacant land on the south side on Mountrose Street east of Hillsdale Street
6. Vacant land on the east side of South Jefferson Avenue north of Fremont Road
7. Vacant land on the south side of Fremont Road west of South Jefferson Avenue



