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# Recommendations on the City of Madison Downtown Plan

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October, 2009

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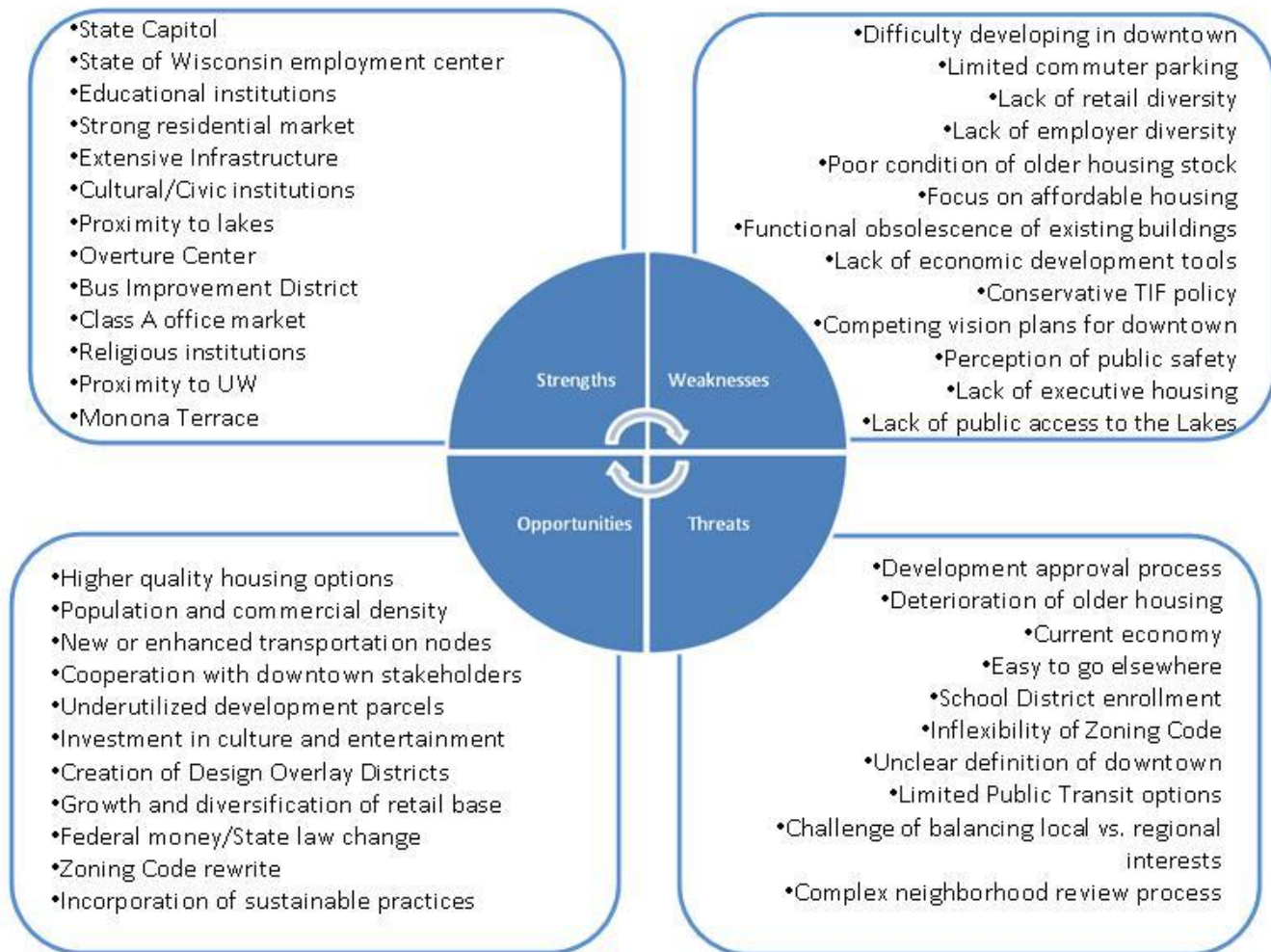
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## Strengths, Weaknesses, Threats and Opportunities Analysis Summary (S.W.O.T.)



## Guiding Principles

1. Downtown Madison is the economic and cultural center of a thriving region and plays an outsized role in the health of the regional economy.
2. In order for the Downtown Plan to be an effective long-term planning document, it must emphasize and incorporate two primary tenets:
  - a. *Flexibility*: to accommodate future changes in the community and marketplace.
  - b. *Feasibility*: to ensure that what is envisioned can realistically be executed and delivered.

## Vision Statement

Downtown Madison should be a thriving regional economic engine that offers a best-in-class quality of life for its businesses and residents.

## Background

This report presents guidance and recommendations to City staff and leaders on a new downtown plan for Madison. The participants represent a broad cross section of downtown real estate professionals (DTREPs) who volunteered their time and energy to provide input to the City of Madison on the forthcoming new Downtown Plan. All of the participating professionals have significant experience navigating the downtown Madison development process from their work as developers, commercial brokers, property managers and consultants. All participants are knowledgeable of current economic and market conditions affecting urban sub-markets and are committed to nurturing the future growth and vitality of downtown Madison.

The DTREPs began with a series of meetings with City staff responsible for development of the new Downtown Plan. At those meetings, the participants learned how the City was approaching development of the Downtown Plan, and they learned that City staff was seeking input from many different stakeholders, including real estate professionals.

After gaining an understanding of how the City was proceeding, the DTREPs began by evaluating the current conditions of the downtown through preparation of a “strengths, weaknesses opportunities and threats (SWOT)” analysis. From that base, the participants then moved into discussion and analysis of the economic and cultural conditions of the downtown, with the aim of preparing key conclusions and recommendations to present as guidance to City staff and elected leaders responsible for developing and implementing the Plan. After several weeks of analysis and debate, participants arrived at a consensus vision for the downtown and specific recommendations aimed at moving the downtown closer to the vision.

This paper presents the vision which emerged from the work of the DTREPs, as well as specific recommendations essential to realizing the vision.

## Theme #1 - Jobs

### *Position Downtown as Regional Engine for Job Growth*

Downtown must be seen as a viable, competitive and attractive place for business location to compete with outlying communities. In order to expand its role as a hub of regional job growth, the Plan should encourage a two-pronged approach in which (1) City of Madison agencies and economic development groups are provided with more effectual tools to attract job growth and (2) the Mayor's Office, the Department of Planning & Community & Economic Development and the Office of Business Resources aggressively work to recruit, grow and retain jobs downtown.

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## Recommendations

- Incorporate the goals and objectives of the City of Madison's Economic Development Plan into the adopted Downtown Plan.
- Work both with City staff and private sector groups to create a recommended list of additional economic development tools that support job recruitment, growth and retention. Work with the Economic Development Director to implement these tools as soon as possible.
- Focus efforts downtown to judiciously use tax increment financing to help support catalytic projects not just in terms of property taxes but jobs and ancillary consumer and business-to-business spending.
- Provide economic development orientation for all newly elected and existing Alders.
- Develop a private/public job tracking system that reports on a consistent basis.
- Promote and market the East Isthmus as a location for new and emerging businesses. This effort will be consistent with the East Isthmus BUILD plan.

## Selected Strengths

- The State of Wisconsin is one of the two largest employers in Madison. Their presence has historically insulated Madison from economic instability.
- UW-Madison is one of the state's largest employers, with approximately 17,000 full-time employees, including the UW Hospitals & Clinics. The presence of the University increases the number of highly educated people in the downtown.
- The downtown has a relatively healthy office market, with low vacancy rates for class-A currently. The presence of the State Government, numerous law firms, lobbying firms and development companies has historically created demand for space.
- The downtown environment enjoys an authentic urban vitality that is very appealing to the emerging knowledge workforce. This cannot be readily duplicated in suburban settings.

## Selected Weaknesses

- Downtown is mostly populated by law firms, lobbying firms, banks, government and university employees. Larger corporate employers have much less of a presence. The quip "we need more than lawyers and lobbyists" reflects a real concern about the ability to draw other businesses to class-A office space.
- The State of Wisconsin is also increasingly looking beyond downtown to headquarters state office facilities, potentially destabilizing this employment sector downtown.
- TIF has the potential to be a strong driver of economic development; however, Madison's specific TIF policies are putting the City at a competitive disadvantage.
- Companies factor availability of executive housing into their consideration of where to locate an office or headquarters, and the downtown area has a perceived lack of executive housing (beyond just condos).
- The cost and limited availability of workforce parking is a significant obstacle to recruiting and retaining high quality jobs into the urban core. Growing knowledge-based businesses will often pay more to be located in exciting urban environments, but an adequate parking supply must be available to accommodate their workforce requirements.

## **Theme #2 - Density**

### *Increase Density and Embrace Growth*

Higher densities promote increased investment, are a critical element of a sustainable urban core, and reduce costs of providing city services. It is critically important that the Downtown Plan recognizes the need to increase density of development, and that these increases need to occur throughout the entire downtown area and not just in select locations. This is not to say that historic districts, green space and the like should be sacrificed. On the contrary, we need (and can) find a balance with all interests and stakeholders in the downtown that will support development, investment and a strong downtown community well into the future.

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## **Recommendations**

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- The Downtown Plan should consider setting minimum density standards for new developments where appropriate and specific to its use.
- Embrace and accommodate growth and density and do so with flexibility in zoning to accommodate market demands.
- The Downtown Plan should designate the west rail corridor for more dense commercial infill redevelopment. This includes Mifflin, West Washington, Proudfit, and Bedford Street frontages.
- Proactively monitor the downtown mix including housing/commercial/retail. Encourage executive housing and work force housing.
- Promote and Market the East Isthmus as a place for new and emerging businesses and increased density.

## **Selected Strengths**

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- The current combination of low-density and deteriorating housing stock in a number of areas downtown make these areas prime candidates for redevelopment.
- Higher density residential and commercial projects have been completed downtown in recent years and have proven that they can work and are a good fit for the community.

## **Selected Weaknesses**

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- Much of the older downtown housing stock is deteriorating, particularly single family homes that have been carved up into multiple unit dwellings and are generally rented to students and lower income renters.
- A number of downtown buildings have reached the end of their useful life unless they undergo massive rehabilitation. Included in this mix are some civic spaces including the Central Library, the Madison Municipal Building, the City County Building, the Veterans Museum, and the Historical Museum.
- Development proposals are often made with a view toward the past and a tendency to preserve the status quo, rather than towards meeting the future needs of the community.

### **Theme #3 – Transportation**

*Improve the Accessibility of Downtown to the greater region through a Regional Transit System and a strong partnership with the City of Madison Parking Utility in order to utilize downtown parking spaces in a more efficient manner*

A mix of transportation options is critical to the continued growth and viability of Downtown. A one-solution-fits-all approach will only exacerbate long-term transportation problems especially in and out of the Isthmus. The goal in any scheme should be to improve the accessibility of the downtown for all stakeholders (auto-users, train-riders, bike-riders, pedestrians). A Regional Transit System and a plan to utilize all parking spaces in downtown Madison are crucial to downtown's success as a destination to work, shop, live and play.

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### **Recommendations**

- Create a partnership among the business community, City of Madison Parking Utility and Madison Metro to address the parking challenges in downtown Madison. Encourage an innovative approach to removing existing obstacles to needed changes.
- Increase parking density for retail in strategic locations throughout the downtown.
- Create awareness and accessibility of parking on or close to State Street through strategic advertising and improvement of the downtown parking experience.
- Add more public parking directional signage from major entrances into the downtown (John Nolen, East Washington, University Avenue).
- Work with the Parking Utility to modify City policy to allow businesses to lease bulk monthly stalls from underutilized ramps in order to get maximum use from existing parking ramps for commuter parking.
- Support and advocate for a Regional Transportation System that increases the accessibility to downtown via modes of transportation other than automobiles.
- Work on a "Park Once" concept for visitors to the downtown by providing a downtown circulator.

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### **Selected Strengths**

- Madison has good infrastructure downtown, including lighting, curb and gutter, street condition and available services in most downtown neighborhoods.
- The potential introduction of high-speed rail between Milwaukee, Chicago, Madison and Minneapolis may provide for enhanced feasibility of local commuter rail and a much needed Regional Transit System.
- There is excess capacity of structured parking stalls that, through a more efficient and streamlined system of municipal management, could be leased in full on a more regular basis.

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### **Selected Weaknesses**

- Many areas of downtown struggle with parking issues, including the perception that there is not a sufficient amount and that the costs associated with parking downtown are too high. The limited availability and expense of commuter parking pose a challenge to property owners and brokers attempting to fill commercial space.
- Existing Taxi prices are disproportionately high and are a barrier for non-Madison residents to and from the downtown. Additionally, the metro bus service outside of the Isthmus is less frequent and non-existent in some areas of the city. The zoning code rewrite calls for a greater dependency on mass transit, but, until viable options for commuters exist, these could serve to threaten mobility in and around downtown.

## **Theme #4 – Political Process**

### *Apply a Fair and Consistent Framework to the Political Approval Process*

The entitlement process is inconsistent and unnecessarily complex. As a result, it has become a real deterrent to investment and development in the downtown pushing attractive development and companies to surrounding communities. The entitlement process must be made simpler and more predictable such that all stakeholders (including the business community) can review and shape development proposals to ensure predictability, consistency and fairness.

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## **Recommendations**

- Work to ensure predictability, consistency and fairness in the entitlement process where City resources are used. Formally recognize those associations that are representative of all stakeholders and are able to vote.
- Review land use plans to ensure consistency across plans. As new plans are prepared, evaluate these plans for inconsistencies so that clear policy can emerge.
- Carefully review new historic districts, conservancy districts and the like to ensure that these plans do not conflict with and usurp the new Downtown Plan.
- Adopt a Downtown Development Comfort Resolution process as part of any new proposal (at the request of the developer) on major projects in order to receive a non-binding vote of support or rejection of the concept. Comfort Resolutions could also be options for smaller projects.

## **Selected Strengths**

- Residents enjoy multiple opportunities to review and comment on development proposals.

## **Selected Weaknesses**

- There are many barriers to developing real estate in downtown Madison. Obstacles to development can result in higher costs to end users and can render the downtown rental market uncompetitive. Some factors include cost of land assemblage, length of time between inception and approval, extensive neighborhood process, and an arduous TIF process.
- The entitlement process in the City of Madison is perceived by developers, investors and current property owners as tumultuous, unpredictable and partisan.
- Overlap exists between the various plans that guide development including Neighborhood Plans, Corridor Plans, the Comprehensive Plan, and the Downtown Plan. This adds significant time and cost to property owners and investors attempting to put together a project and threatens the vitality of the office, retail, and residential markets where investors and employers have a multitude of alternative options in competing neighboring communities.



## Appendix

### Strengths, Weaknesses, Opportunities and Threats Analysis

## **Strengths**

### State Capitol

The State Capitol is a truly unique cultural, architectural and economic asset. It draws thousands of visitors annually. The business of government also creates significant demand for office space by law firms, associations and lobbying firms. The presence of these jobs creates a demand for restaurants and other businesses that surround the square.

### State of Wisconsin Employment Center

The State of Wisconsin is one of the two largest employers in Madison. Their presence has historically insulated Madison from economic instability.

### Educational Institutions

UW-Madison is one of the state's largest employers, with approximately 17,000 full-time employees, including the UW Hospitals & Clinics. The presence of the University increases the number of highly educated people in the downtown. UW-Madison is visited by people from all over the world who participate in the academic, social and cultural events. Madison Area Technical College also has a presence that positively impacts the downtown.

### Strong Residential Market

The downtown rental market continues to thrive even as the type of housing downtown continues to change. Supply and demand for housing downtown continues to be strong, with a rental rates increasing in the downtown area in recent years.

### Good Infrastructure

Madison has good infrastructure downtown, including lighting, curb and gutter, street condition and available services in most downtown neighborhoods.

### Event Driven Marketing Civic and Cultural Events

Downtown Madison has a myriad of cultural and civic events to draw downtown visitors. Concerts on the Square, Farmers Market, Art Fair on the Square, Kohl Center Events, Badger Football game days, Dane Dances, Jazz at 5, multiple theaters, museums, the State Street brand and the Union Terrace are great examples of events that draw significant numbers of visitors to downtown annually.

### Proximity to Lakes Mendota and Monona

The proximity of Lakes Mendota and Monona, along with a beautiful network of parks, is an enviable asset.

### Overture Center

The Overture Center brings in approximately \$19 million annually in event related spending (excluding ticket prices) and in 2006 had 420,000 visitors. Long-term it serves as a great asset increasing Madison's credibility as a hub for the Arts.

### Effective Business Improvement District

Downtown Madison has a strong and successful BID that promotes the health and vitality of downtown through its marketing and advocacy of downtown businesses.

### Strong Class A Office Market

The downtown has a strong Class A office market, with relatively low vacancy rates historically. The presence of the State Government, numerous law firms, lobbying firms and development companies downtown keeps this market healthy.

### Religious Institutions

The presence of multiple churches and religious organizations downtown provides many services to downtown residents and draws membership from greater Madison, many of whom attend church services and events downtown.

### Monona Terrace

The Monona Terrace is a community gathering place, tourist destination and a catalyst for economic activity. Monona Terrace enhances quality of life with free community concerts, children's programs, lectures, education and wellness programs, and more. The economic impact from MT hosted conventions and conferences over the past four years (2005 – 2008) have been \$162,652,673.

## **Weaknesses**

### Difficulty of Developing Downtown

There are many barriers to developing real estate in downtown Madison. Obstacles to development can result in higher costs to end users and can render the downtown rental market uncompetitive. Some factors include cost of land assemblage, length of time between inception and approval, extensive neighborhood process and an arduous TIF process.

### Limited Commuter Parking/Perception of lack of Parking

Many areas of downtown struggle with parking issues, including perception that there is not enough parking downtown and the costs associated with parking downtown. The limited availability and expense of commuter parking pose a challenge to property owners and brokers attempting to fill commercial space. Other factors affecting the poor perception of parking availability include inclement weather and increased difficulty in parking during major events (football game days, overture events, concerts on the square, farmers market, etc).

### Lack of Retail Diversity

Whereas downtown has a plethora of dining and entertainment options, there are not as many retail and entertainment options. Major national retailers are rare in the downtown forcing residents and those that work downtown leave the area to shop for many basic goods and services. More people living downtown will drive retail; however, those living downtown now want access to grocery stores, health and beauty, home furnishings, large format book stores, electronics, etc.

### Lack of Employer Diversity

Downtown is mostly populated by law firms, lobbying firms, banks, government and university employees. Larger corporate employers have much less of a presence. The quip “we need more than lawyers and lobbyists” reflects a real concern about the ability to draw other businesses to class A office space. The State of Wisconsin is also increasingly looking beyond downtown to headquarters state office facilities, a market typically cornered by the downtown core.

### Poor Condition of Older Housing Stock

Much of the older downtown housing stock is deteriorating, particularly single family homes that have been carved up into multiple unit dwellings that are generally rented to students and lower income renters. The costs and scope of work required to bring these properties up from sub-standard conditions is often daunting. The increase in new student housing has further added to the problem as many older homes are being vacated and have no immediate viable options for improvement.

### Heavy Focus on Affordable Housing

The City of Madison has historically focused on championing issues related to affordable housing and other social services. Conversely, less attention has been paid to promoting economic development in the City’s urban core. Real average and median income levels in Madison have consequently decreased in recent years. Households with above-average incomes contribute significantly to the amount of discretionary spending in a community, meaning the City should have a vested interest in attracting high net-worth individuals downtown by offering incentives for executive housing and other provisions to attract the wealthy.

### Functional Obsolescence of Existing Downtown Buildings

A number of downtown buildings have reached the end of their useful life unless they undergo massive rehabilitation. Competing for tenants with new construction on the perimeter of the City and in surrounding growing communities creates a challenge in terms of cost and feasibility for owners of older downtown buildings. Civic buildings are also included in the mix of buildings in need of rehabilitation and reinvestment, such as the Central Library, the Madison Municipal Building, the City County Building, Veterans Museum and Historical Society Museum.

#### Onerous Tax Incremental Financing (TIF) Policy/Lack of Economic Development Tools

The City Council recently voted to amend the City's TIF policy. While TIF's focus on job creation is an important economic development tool, its complicated requirements, equity participation formula, incongruity between the risks taken by developers and the amount of financing received and punitive measures tied to performance are troubling. TIF has the potential to be strongest powerful driver of economic development; however, Madison's specific TIF policies are putting the City at a competitive disadvantage.

#### Competing Vision/Plans for Downtown

It has been said that any single piece of property in Downtown Madison might be subject to an extensive list of plans that guide development, including Neighborhood Plans, Corridor Plans, the Comprehensive Plan and the Downtown Plan. Each plan has its own set of stakeholders and opinions on how the downtown should look and function. Neighborhood groups, special advocacy groups, Downtown Madison Inc, Smart Growth Greater Madison, individual residents, business owners and property owners all have unique and often conflicting vision for the Downtown. This adds significant time and cost to property owners and investors attempting to put together a project and threatens the vitality of the office, retail and residential markets where investors and employers have a multitude of alternative options in competing neighboring communities.

#### Perception of Public Safety

Overall crime dropped 1.3 percent in 2008; however, public safety remains a concern to many residents when considering whether to spend time and money downtown. A few high profile incidents in recent years, a highly visible transient population and the concentration of bars with a large number of student drinkers all lend to this perception that downtown is less safe than other areas of the city.

#### Lack of Executive Housing

Companies factor availability of executive housing strongly into their consideration of where to locate an office or headquarters. Madison does have a large number of condos currently on the market. However, a project started today would not be on the market for up to six years. Even with the very slow absorption rate in the current market it is very possible there will be a shortage down the road. Additionally, there are extremely limited single family executive housing opportunities in the downtown.

#### Lack of public access to the lakes/Poor water quality

Currently the public has extremely limited access to the downtown lakes. Additionally, the lakes themselves suffer from poor water quality, often resulting in shut downs of the few beaches and warnings to swimmers.

## **Opportunities**

### Transition to Higher Quality Housing Options

The revitalization of downtown has attracted high quality, energy efficient, modern housing to the downtown area. A balanced approach to historic preservation where appropriate coupled with the replacement of deteriorating housing stock with modern, sustainable housing is a tremendous opportunity.

### Increased Population and Commercial Density

Increasing density downtown could lead to better economic viability of alternative transit options. Increasing the availability of alternative transit would lower fossil fuel use per resident while increasing the revenue base to downtown businesses. Higher density obviously presents challenges in terms of parking and traffic, but the long-term economic and sustainability benefits of higher density outweigh the costs associated with denser development.

### New or Enhanced Transportation Nodes and Modes

The City continues to explore ways to increase transit options. The current draft of the new Zoning Code includes the option for a transportation overlay district that enables the creation of a new multi-modal transportation hub. Given the geographic limitations of the isthmus, parking concerns and the desire for greater density, transportation enhancement is critical to the success of the downtown, and the new zoning code can enable and encourage needed changes to happen.

### Better Cooperation with Downtown Stakeholders

The new zoning code and the addition of the Downtown Master Plan to the Comprehensive Plan provide the opportunity to drastically reduce reliance on the PUD process. This creates more predictability for both neighborhoods and developers when engaging new development projects. Acknowledging the difficulties of the past presents an opportunity to forge better cooperation between neighbors, business owners and developers.

### Underutilized Development Parcels

Many downtown properties are underutilized or functionally obsolescent. These properties represent an opportunity to transition to modern energy efficient structures and increase density. Once redeveloped these parcels can serve as a significant driver for additional investment, tax base and job growth in the downtown.

### Continued Investment in Cultural and Entertainment Districts

Downtown Madison provides many cultural and entertainment options; however, Madison can continue expanding and enhancing these districts to draw additional visitors downtown. Currently the Downtown Hospitality Council is exploring ways to build-on and improve the nightlife downtown, including the mix of cultural and entertainment options available.

### Design Overlay District/Form-Based Development

The East Rail Corridor Plan is the result of long negotiations between neighborhoods, developers, Plan Commissioners and City staff. The plan creates predictability for neighbors and a viable starting point for developers, which should allow for future development opportunity under contiguous building design and density criteria.

### Continued Growth and Diversification of Retail Base

As more people move downtown, the mix of retail options will most likely expand. Encouraging a healthy diversity of retail that will help draw customers to the downtown and support the needs of downtown residents.

### Federal Money/State Law Change

Recent state and federal actions provide new opportunities for downtown Madison. Federal stimulus money is available for infrastructure, transportation, energy efficiency and a host of other local projects.

The State also passed legislation as part of the 2009-11 budget that enables the creation of Regional Area Transit authorities by counties, including Dane.

#### Zoning Code Rewrite

The Zoning Code rewrite process has been referenced in multiple areas of this analysis and is critical in framing how development will happen in Madison. The current draft of the code does not include downtown districts as it is contingent on the Downtown Master Plan. However, overlay districts, forms, process and other existing language in the draft will affect downtown, and what the Council ultimately passes will have a profound impact on future development.

#### Economic Viability of Sustainable Practices

Sustainable design and building practices have been rapidly accepted in recent years and are now in high demand as consumers continue to demand “green” products. The Downtown Plan should enable and encourage of the adoption of sustainable building practices but not as mandates. Letting the market work or incentivizing sustainable building are more effective options.

## **Threats**

### Development Approval Process

The development entitlement process is long and arduous for many developers. Updating the zoning code and including form-based design criteria could streamline the process while maintaining the level of quality of inspection necessary to meet City design requirements. There are significant holding costs, architectural fees, attorney fees, lobbyist fees, and increased cost of materials that can affect a developer's bottom line given delays in the development process. In other words, the time between proposal and the approval of a project can make or break its opportunity at success. Significant delays in the entitlement process therefore leave developers exposed to market shifts that can threaten the feasibility of even the soundest development deals.

### Further Deterioration of Older Housing Stock

Declining older housing stock is weakening the attractiveness of some downtown neighborhoods. The continued deterioration is a threat to a thriving downtown which if not addressed, could pose significant limitations to redevelopment.

### Current Economy

Whereas Dane County has been historically sheltered from recession, the current economic conditions have lead to a dramatic drop-off in new construction permits and financing for new projects. The Downtown Plan must look beyond the current state of the economy while acknowledging the impact it is having today on job creation and development.

### Easy to go Elsewhere

Downtown Madison has to compete like every other community and must position itself accordingly. Businesses are looking to cut costs and improve revenue at every opportunity. Therefore, it is imperative the Downtown Plan address the difficulty facing downtown business and property owners. The Downtown Plan will not succeed if we do not create specific provisions for recruiting and retaining businesses and residents.

### School District Enrollment

Schools serving the downtown are struggling with lower enrollment and a rise in poverty rates of their students. This trend threatens the perception of quality of downtown public schools. Good schools are imperative to attracting families to the downtown residential neighborhoods. Creating a strong mix of residents is important to increasing the variety of demand for services, and thus, diversification of businesses locally.

### Inflexibility of Zoning Code (Draft) and Existing Plans to Market Conditions

The current draft of the zoning code does not allow for increased height in the newly proposed PUD process. The downtown height limits, outside of state statute as it relates to Capitol height restrictions, have not been established in the current draft of the zoning code rewrite. The existing zones only allow for up to 5 stories, which poses a barrier to increasing the density of new development.

### Definition of Parameters of Downtown

The area that is considered "downtown" may have technical lines drawn defining it; however, the lines have shifted over time and public perception of what is considered downtown varies from person to person. Creating a cohesive vision for downtown is contingent on determining if it is based on the firmly drawn lines or if there are wider parameters.

### Limited Access to Affordable, Reliable Transit Options

Getting people downtown and accommodating them once there is challenging from a public transportation standpoint. Existing ordinances keep taxi prices disproportionately high. Additionally, the metro bus service outside of the campus/square area is sporadic, and in some cases non-existent. The zoning code rewrite calls for a greater dependency on mass transit, but until viable options for commuters exists, these could serve to threaten mobility in and around downtown.



### Downtown Stakeholders Unbalanced with the Needs of the City/Region

Downtown Madison is not only home to many residents and businesses; it serves as the heart of the North-central Wisconsin region. This presents a unique challenge of balancing both local and regional interests.

### Obstacles to Obtaining Desired Density

The current zoning code, particularly downtown, does not allow for the type of urban use and density that the City's Comprehensive Plan calls for. This leads to a dependency on Planned Unit Development zoning as the rule, which can be an expensive and arduous process for developers.