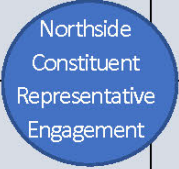




OSCAR MAYER STRATEGIC ASSESSMENT MEETING SCHEDULE AND TIMELINE

| COMMITTEE MEETINGS | | | | | |
|---|--|--|--|---|--|
| May 8 | June 12 | July 9 | August 13 | September 24 | October 23 |
| <ul style="list-style-type: none"> • Analysis categories • Committee priorities • Interview list | <ul style="list-style-type: none"> • Opportunity analysis/assessment review • Objective categories | <ul style="list-style-type: none"> • Follow-up analysis review • Constituent Rep – engagement findings | <ul style="list-style-type: none"> • Committee survey results/redevelopment objectives discussion • Objectives work-session • Boundary discussion • Review key elements of Special Area Plan | <ul style="list-style-type: none"> • Summary document review • Tools & recommendations • Review of RFP for Special Area Plan | <ul style="list-style-type: none"> • Report adoption by the OMSAC |
| | | | | | |
| Assessment & Opportunity Analysis | | Redevelopment Objectives & Study Boundary | | Summary Document | |
| Interviews | | | | | |
| |  |  | |  | |



OSCAR MAYER AREA STRATEGIC ASSESSMENT INITIAL ANALYSIS AND OPPORTUNITIES

June 12, 2018



INITIAL ANALYSIS AND OPPORTUNITIES

MATERIAL COVERED TODAY

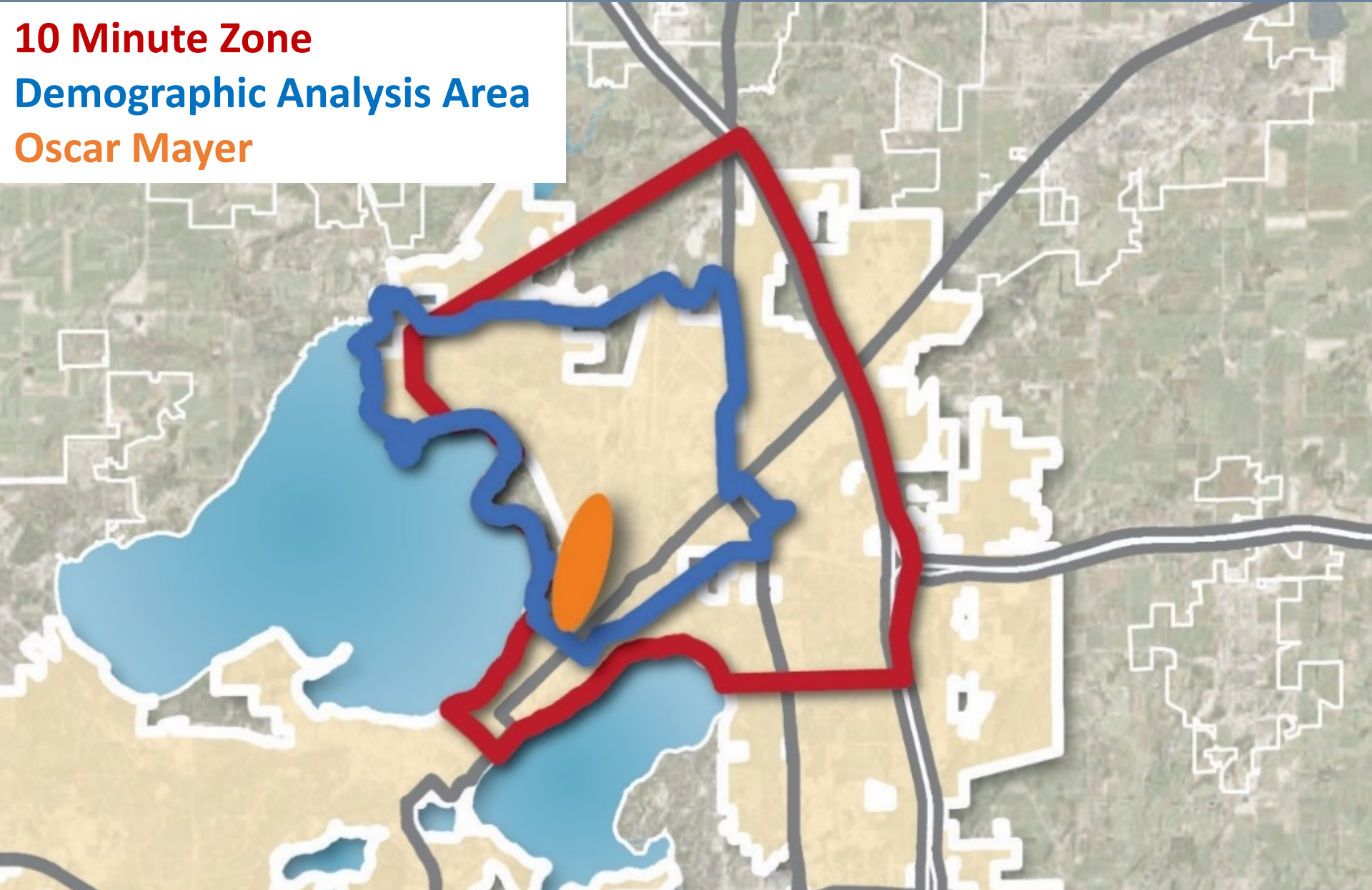
1. Metro Area – Economic Growth
2. Competitive Advantages of the Northeast Side
3. Oscar Mayer Impacts
4. Workforce and Employment - 10 Minute Drive
5. Northside Demographic Profile
6. Assets of the Corridor and Oscar Area
7. Sense of Scale of the Corridor
8. Big Picture Opportunities

SCALES OF ANALYSIS

10 Minute Zone

Demographic Analysis Area

Oscar Mayer



WHAT'S DRIVING OUR GROWTH?

LOCATION

UNIVERSITY

QUALITY OF PLACE

ECONOMIC GROWTH

GROWING INDUSTRY CLUSTERS & EXAMPLES



Over 23,000 “Innovation Cluster” jobs created in last 10 years

Madison MSA ranked No. **13** in economic strength out of 383

- [Policom, 2018](#)

Madison gained the greatest percentage of 22- to 34-year-old workers from 2001 to 2016, and from 2011 to 2016

- [Forbes, 2017](#)

Tech Degree Growth in Greater Madison 2011-15



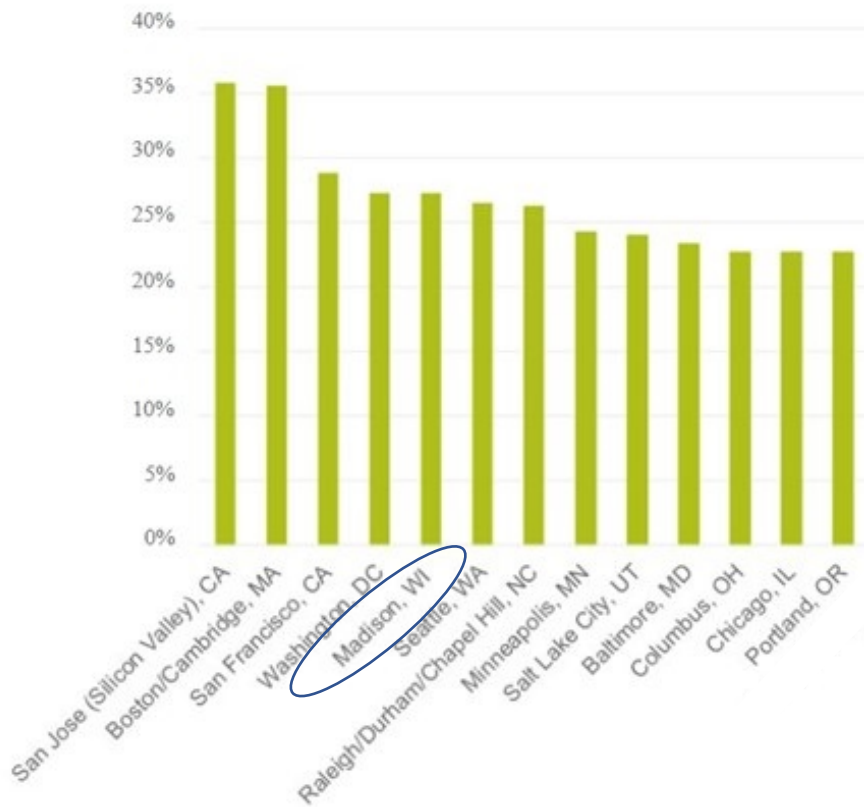
Total Tech 32%
Comp. Engineering 51%
Math/Stats 56%
Other Tech/Engineering 8%

National Center for Education Statistics; CBRE

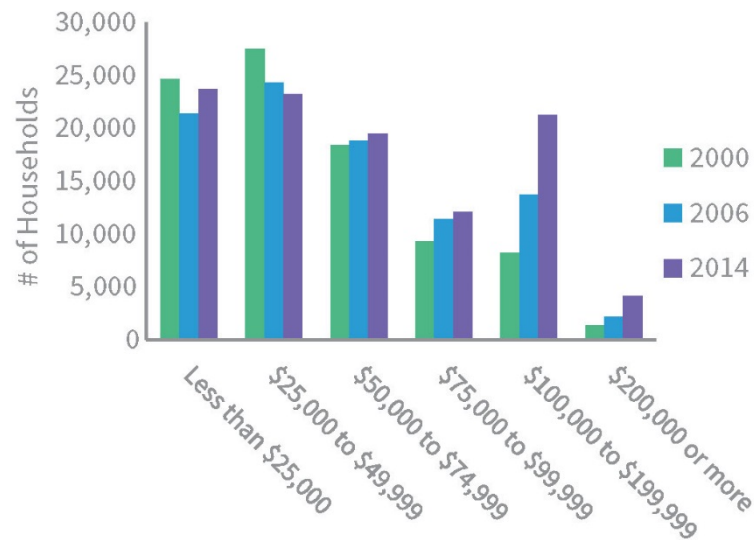
HIGH-SKILLED WORKER GROWTH AND INCOME

SHARE OF WORKFORCE IN KNOWLEDGE OCCUPATIONS

Source: U.S. Bureau of Labor Statistics



Household Income²¹



Since 2000, there has been a significant increase in the number of households earning more than \$100,000 while those earning less than \$75,000 has remained nearly the same (not adjusted for inflation).

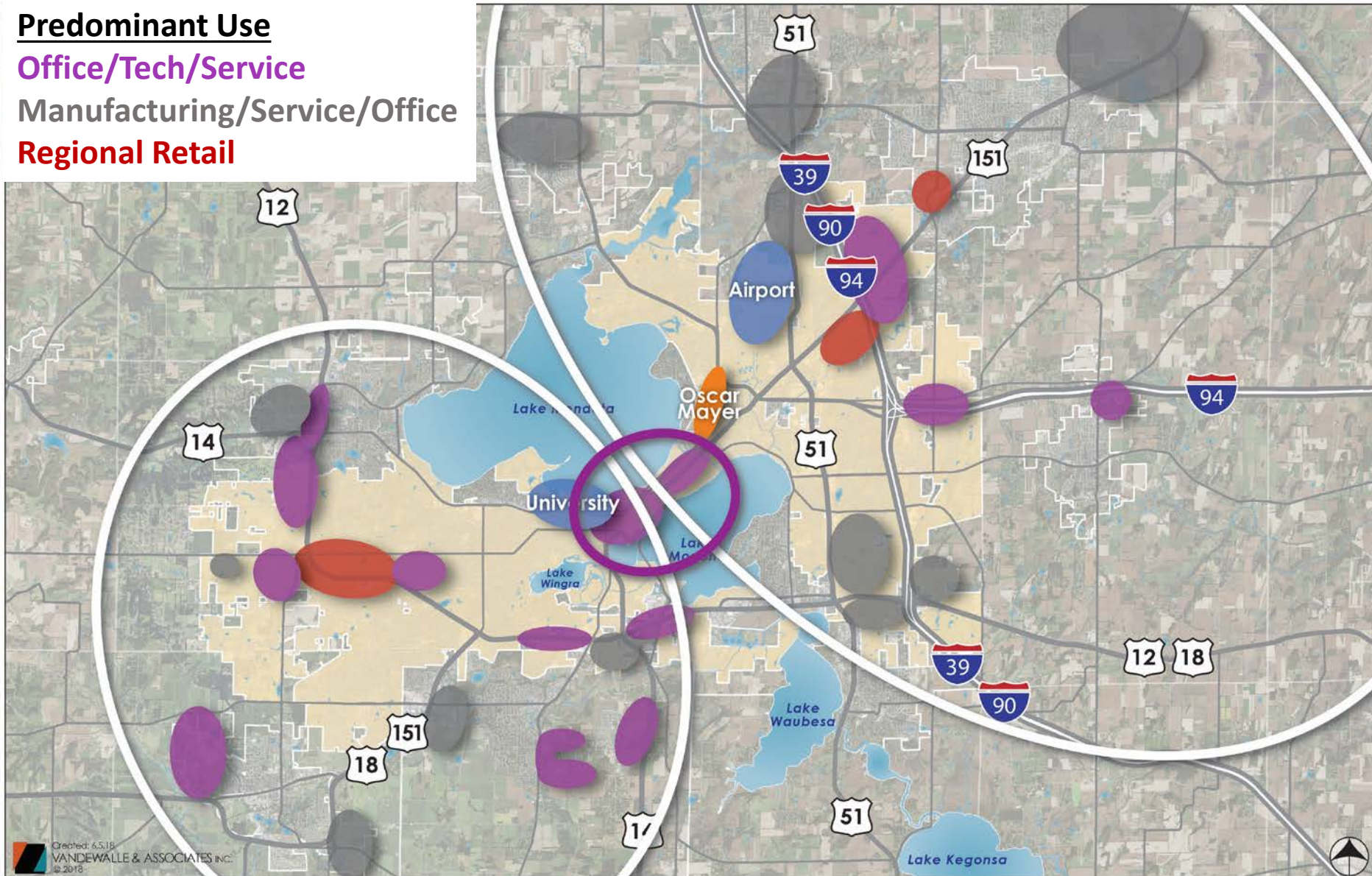
MAJOR EMPLOYMENT AREAS – Locational Advantages

Predominant Use

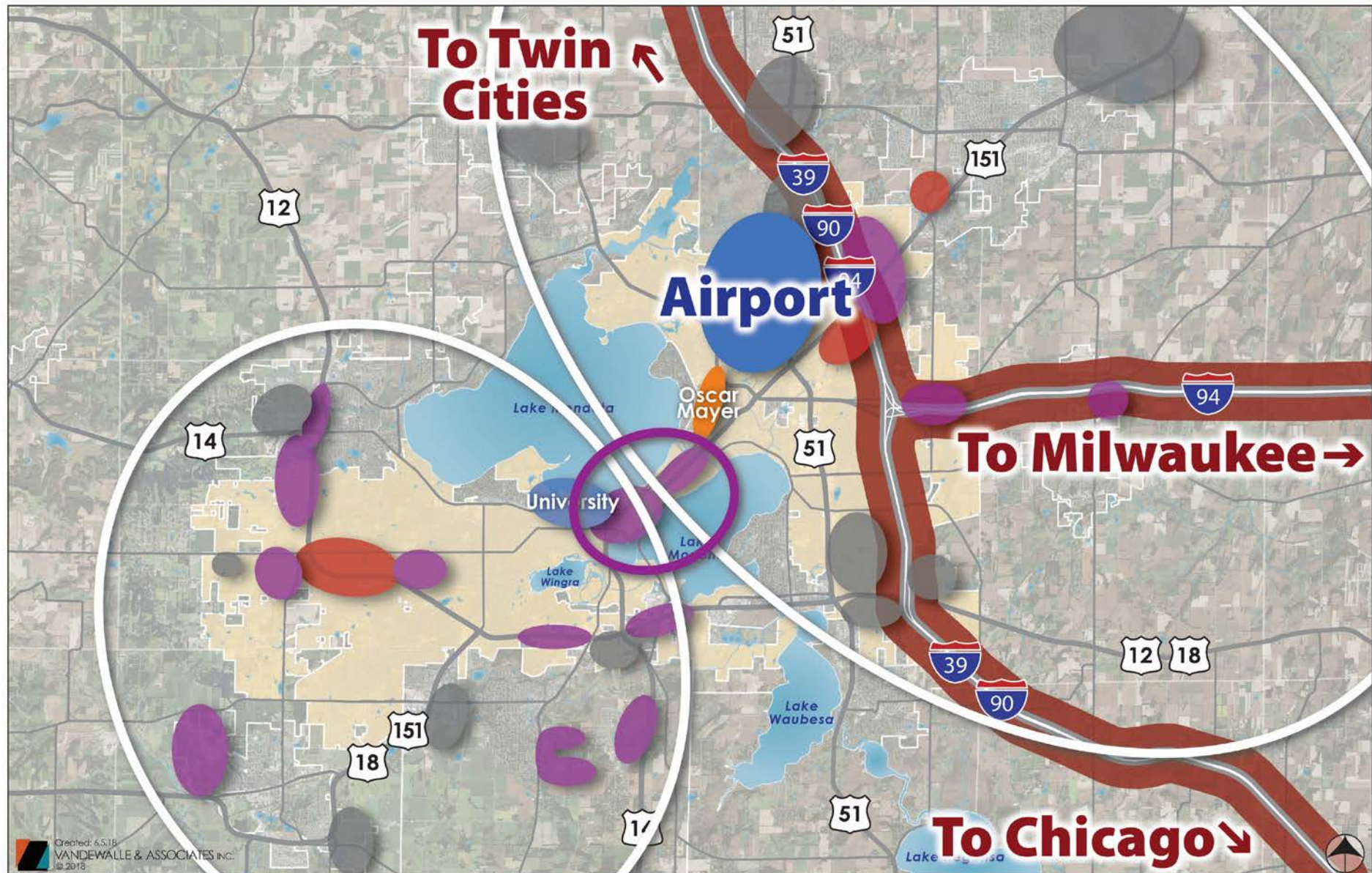
Office/Tech/Service

Manufacturing/Service/Office

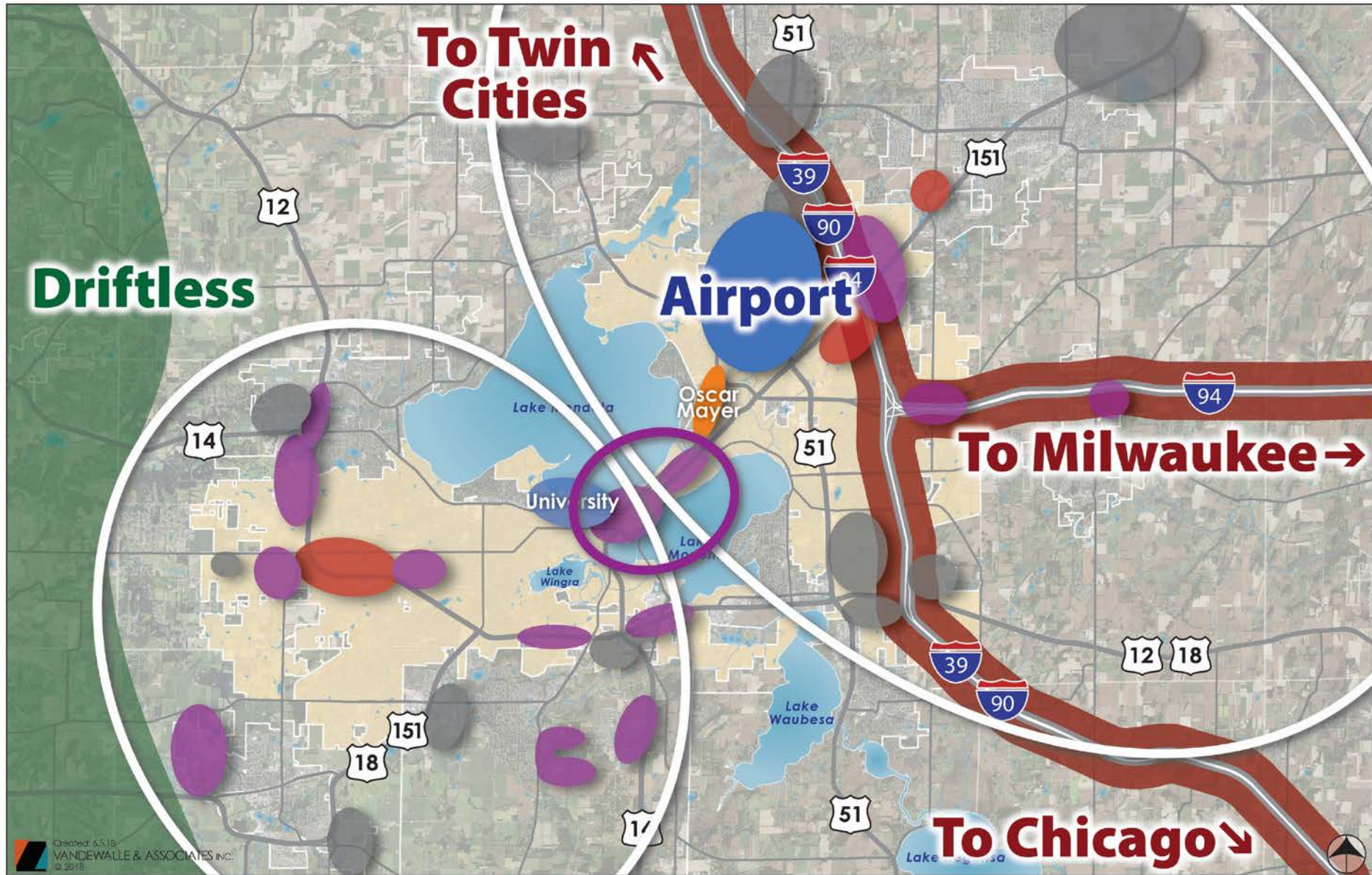
Regional Retail



MAJOR EMPLOYMENT AREAS – Locational Advantages



MAJOR EMPLOYMENT AREAS – Locational Advantages



WHERE & WHEN WILL MADISON GROW IN THE FUTURE?

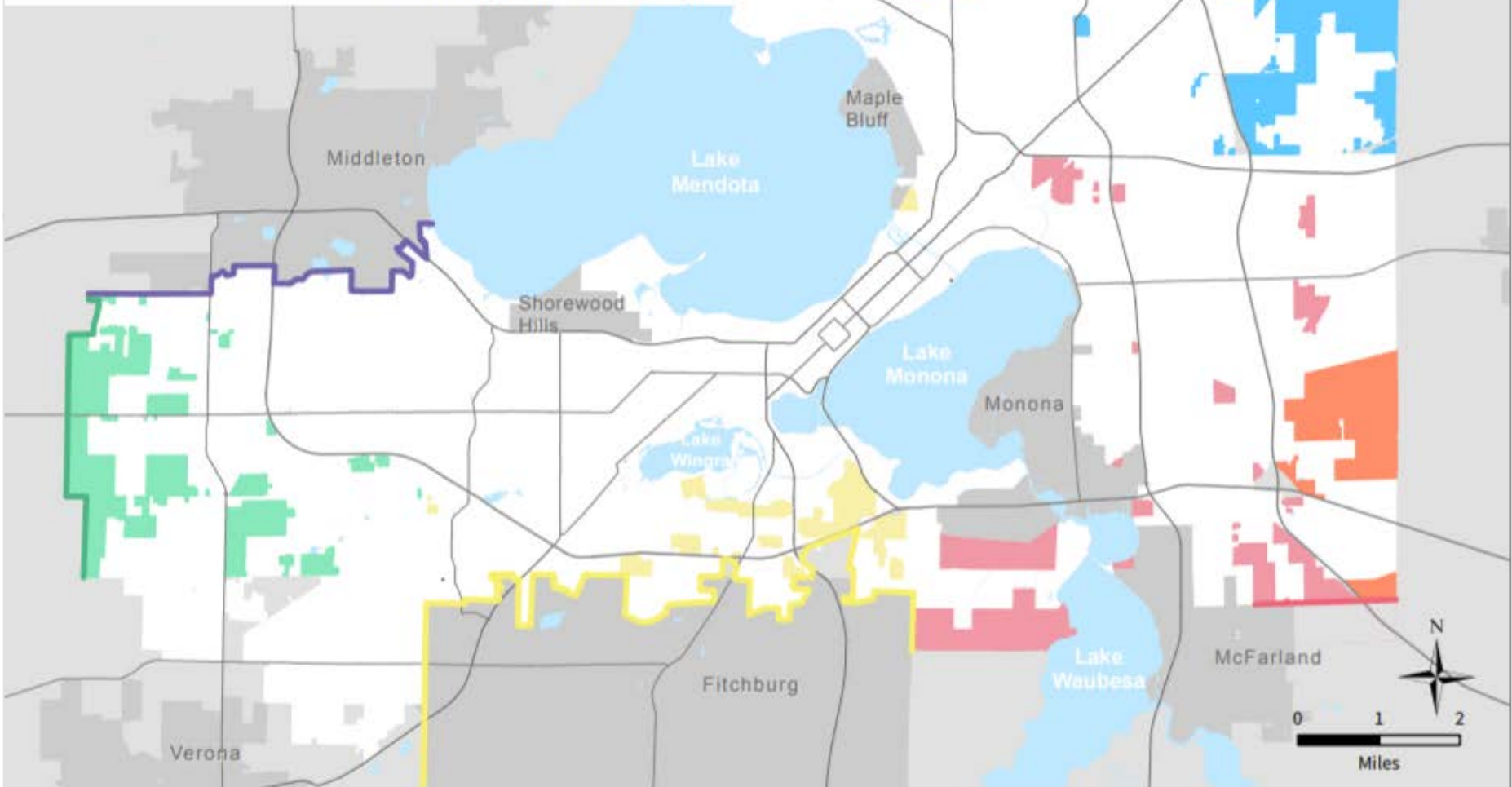
Final Boundary Agreement Lines

- City of Fitchburg
- Village of McFarland (2017)
- City of Middleton
- Town of Middleton (2042)
- City of Sun Prairie, Village of Deforest, Town of Burke (2036)

Future Parcels From:

- Town of Blooming Grove (2020)
- Town of Blooming Grove (2027)
- Town of Burke (2036)
- Town of Madison (2022)
- Town of Middleton (2042)

Data Source: City of Madison DPCEd, Planning Division



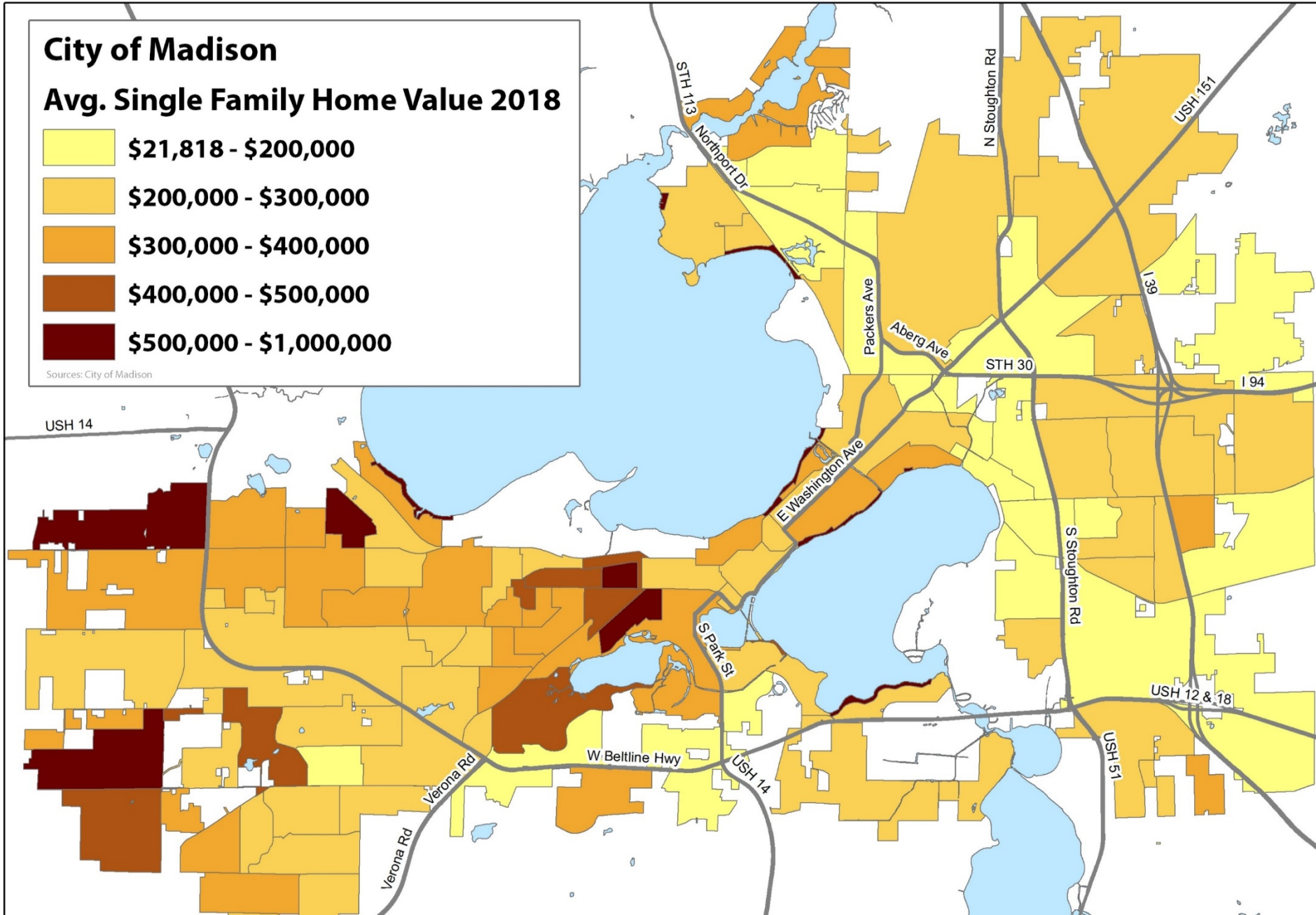
MADISON SINGLE FAMILY ASSESSMENT VALUES, 2018

City of Madison

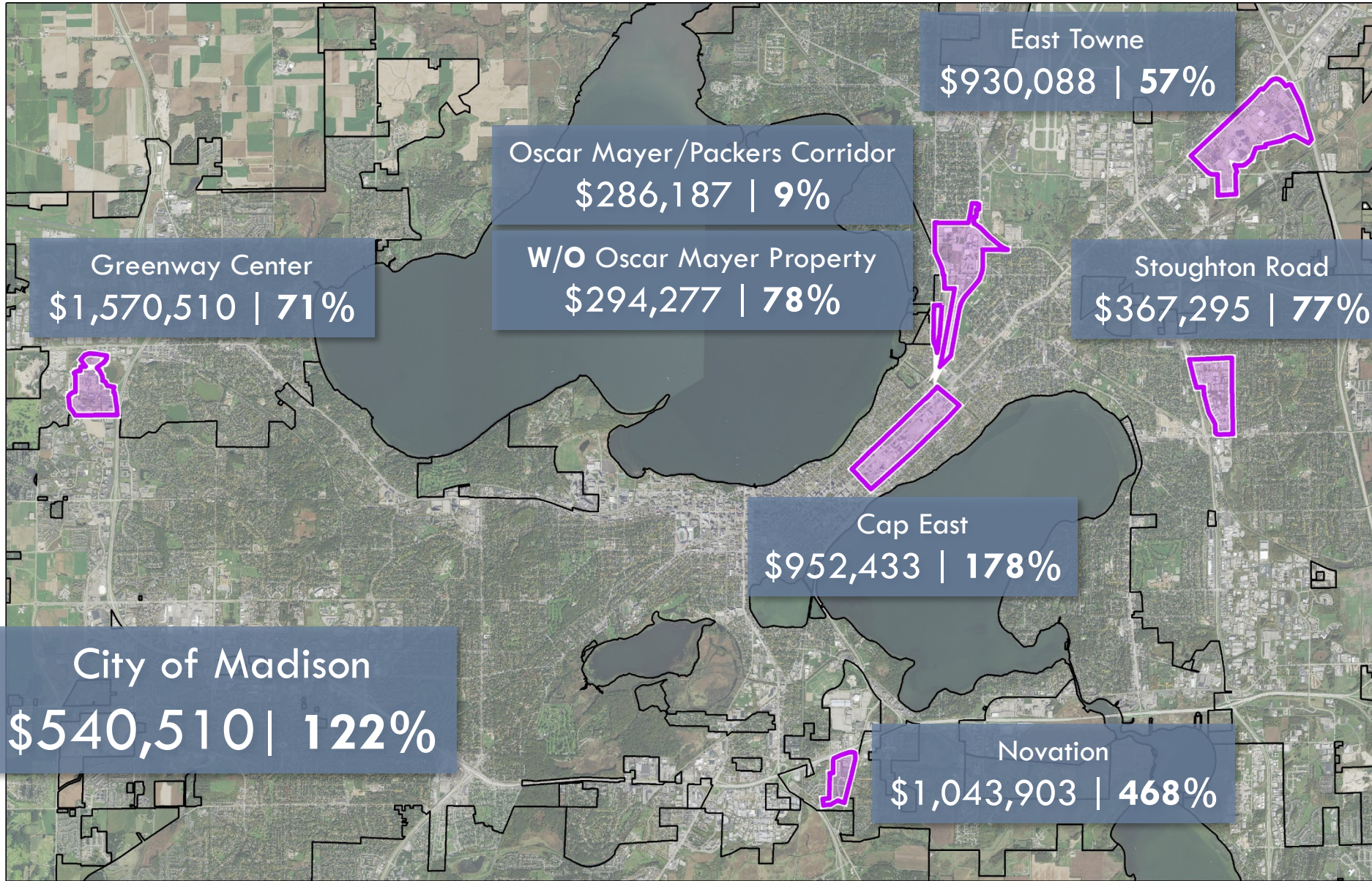
Avg. Single Family Home Value 2018



Sources: City of Madison



VALUE PER ACRE (2018) / CHANGE IN VALUE IN DIFFERENT AREAS (2000-2018)



OSCAR MAYER IMPACTS

JOBS

- 1970's – 4,000 jobs
- 2013- 1,300 jobs
- 2017 – 640 final job loss (140 corporate, 500+ production)
 - 73% of production workers were Dane County residents
 - 23% were Northside residents (2015)

TAX BASE

- 2017 - \$23.5M (to be reassessed June 2018)
- 2003 - \$34M

UTILITIES

- \$232,000 reduction in water utility income
- \$500,000 reduction in annual wastewater treatment income
- \$3 million gas and electric revenues

OTHER

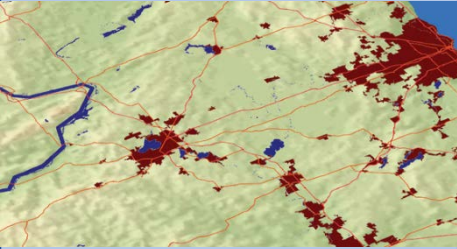
Reduction in philanthropic resources to community

Loss of customer base/revenues for nearby retail, restaurants, and service businesses

Sources: City of Madison, Madison Gas & Electric, Madison Water Utility, Madison Metropolitan Sewerage District, Workforce Development Board of South Central Wisconsin, Wisconsin State Journal

A FEW TAKEAWAYS

REGIONAL



- Diverse high tech economy able to grow here – critical mass accelerates trajectory
- STEM workforce demand rising/labor shortage
- Significant increase in number of high income earners



WORKFORCE AND EMPLOYMENT 10 MINUTE DRIVE

10 MIN ZONE - JOBS

42,620
WORKFORCE
living in 10 min
zone

74,497
JOBS in 10
min zone

265,539
JOBS in City
of Madison

424,777
JOBS in
Dane County

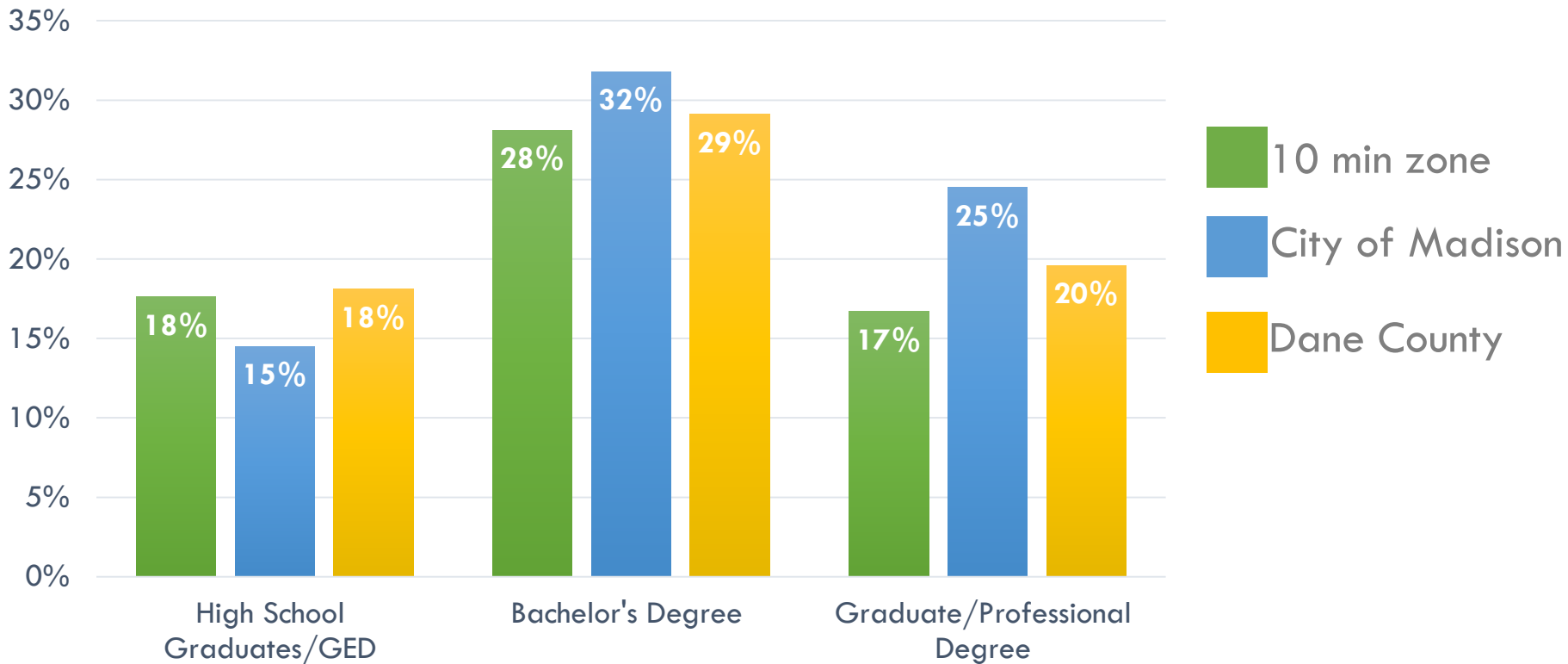
INDUSTRIES

| INDUSTRIES | 42,620 WORKFORCE living in 10 min zone | 74,497 JOBS in 10 min zone | 265,539 JOBS in City of Madison | 424,777 JOBS in Dane County |
|-------------------------------|---|----------------------------------|---------------------------------------|-----------------------------------|
| Agriculture/Mining | 0.3% | 0.1% | 0.1% | 0.2% |
| Construction | 3.3% | 2.2% | 2.3% | 3.7% |
| Manufacturing | 7.5% | 6.5% | 4.1% | 8.0% |
| Wholesale Trade | 1.9% | 8.2% | 3.7% | 4.8% |
| Retail Trade | 9.7% | 12.7% | 9.3% | 10.1% |
| Transportation/Utilities | 2.7% | 2.7% | 1.9% | 1.6% |
| Information | 2.1% | 1.3% | 3.2% | 3.0% |
| Finance/Insurance/Real Estate | 7.8% | 6.6% | 9.4% | 9.2% |
| Services | 59.4% | 36.0% | 53.0% | 49.7% |
| Public Administration | 5.3% | 23.2% | 12.8% | 9.2% |

- More jobs than workforce in 10 min zone
- 10 min zone has a higher diversity of jobs compared to City and County
- **28% of the City's jobs are within 10 min zone**

10 MIN ZONE – EDUCATIONAL ATTAINMENT

- Educational attainment (25+) of workforce within 10 min zone reflects City and County



COMPANIES WITH OVER 200 EMPLOYEES (non retail)

- Private



201 – 299 Employees



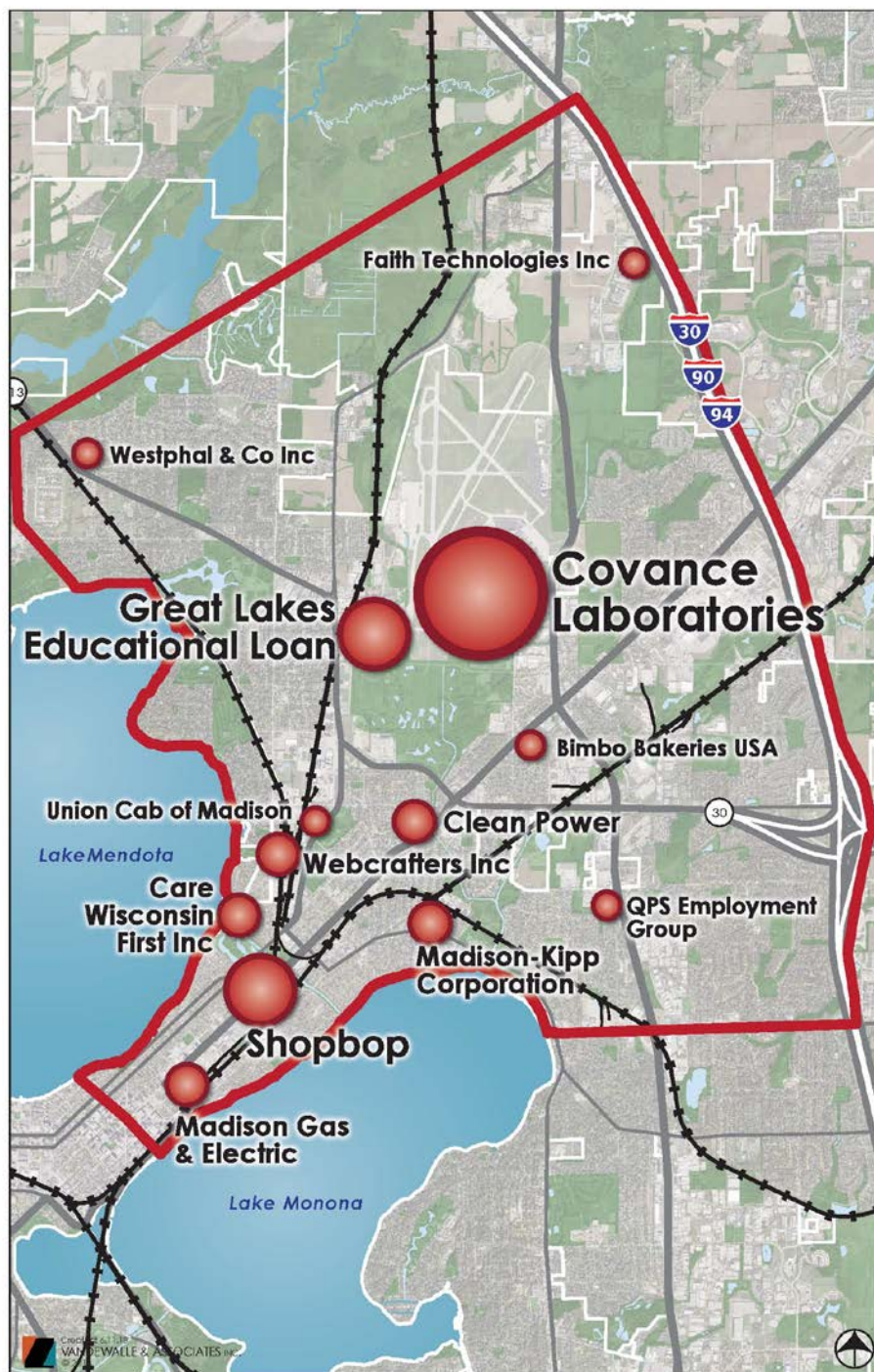
300 – 499 Employees



500 – 1,999 Employees


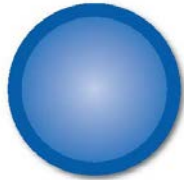


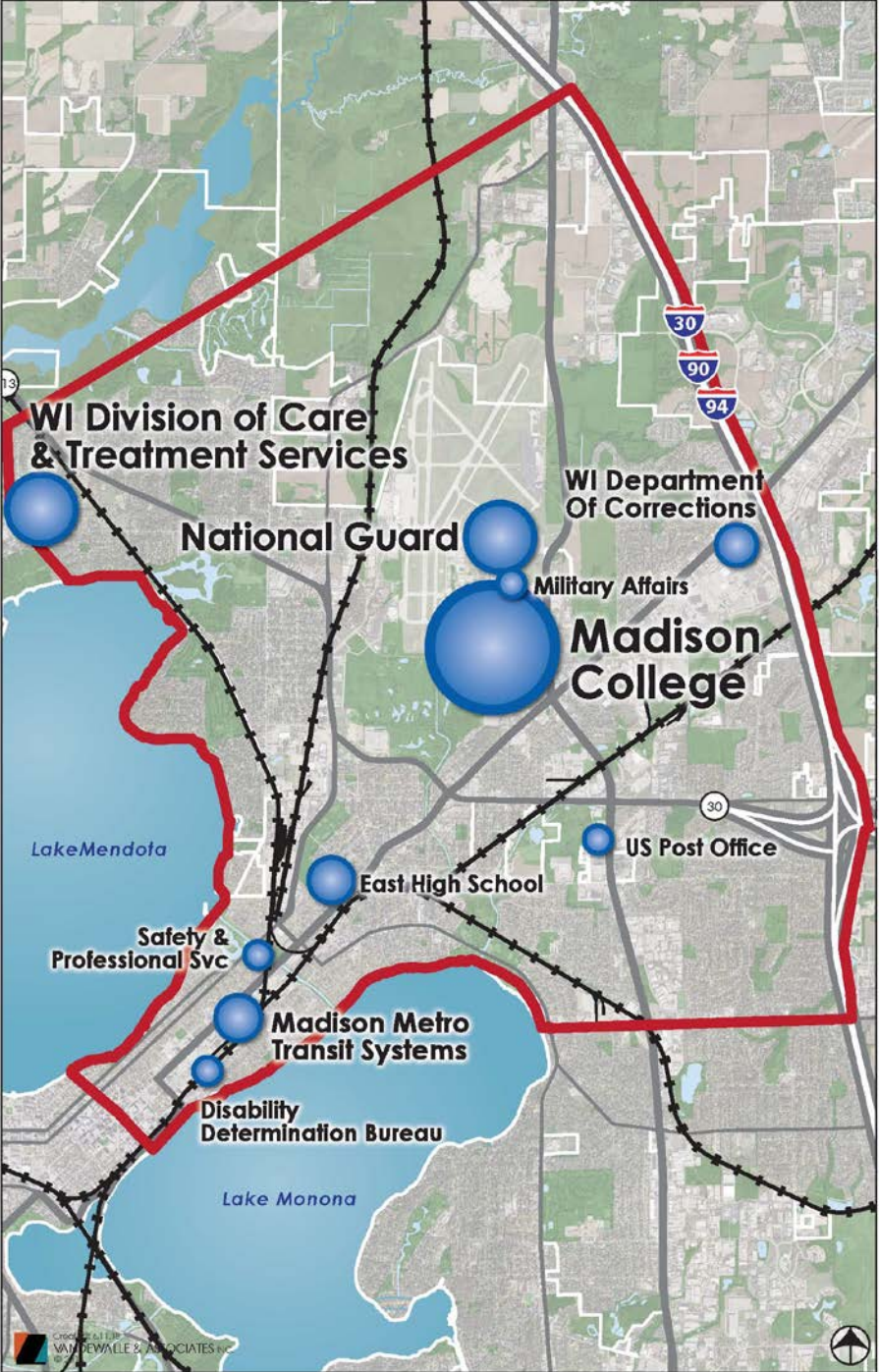
2,000+ Employees

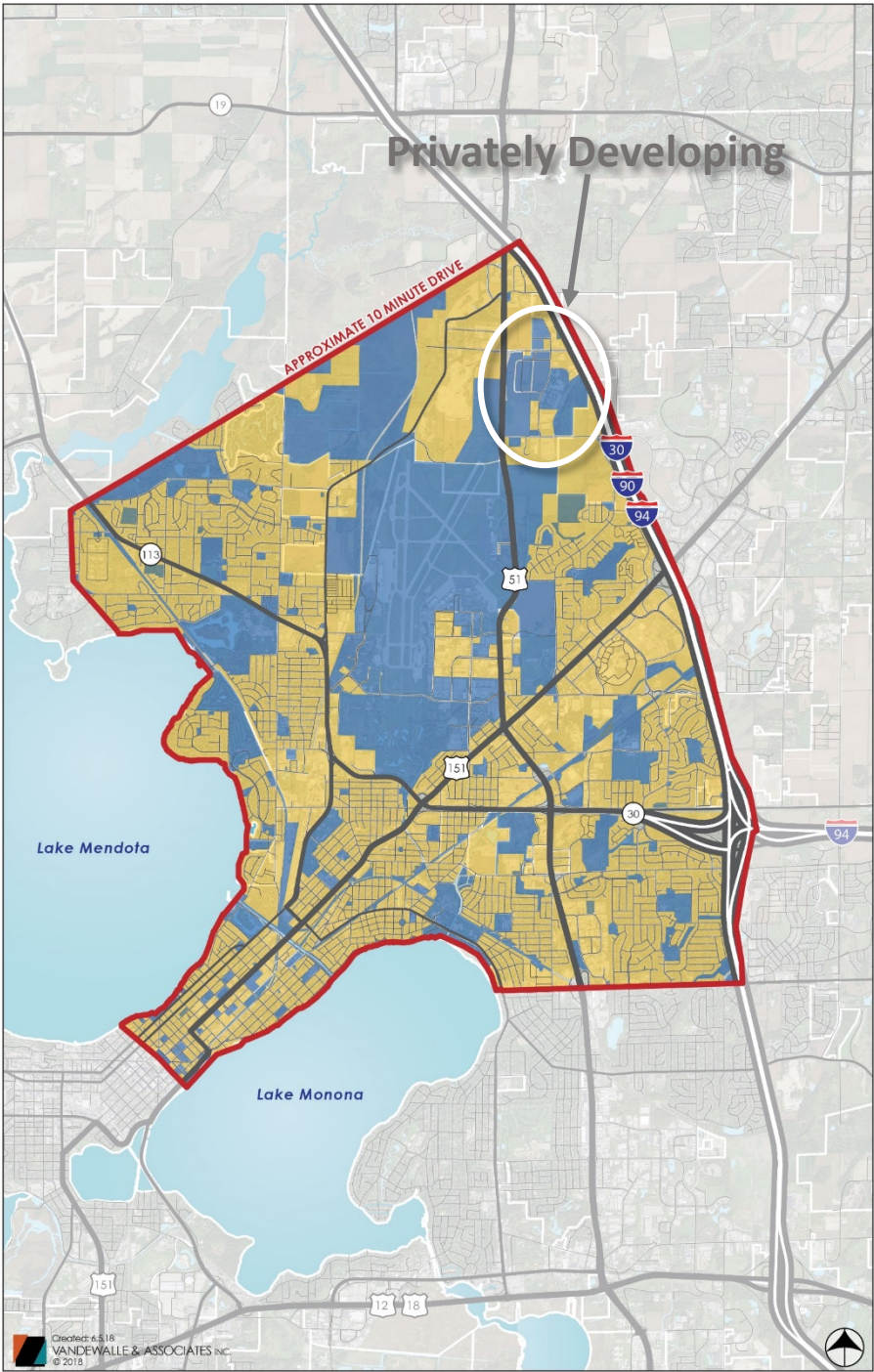


PUBLIC EMPLOYERS OVER 200

- Public

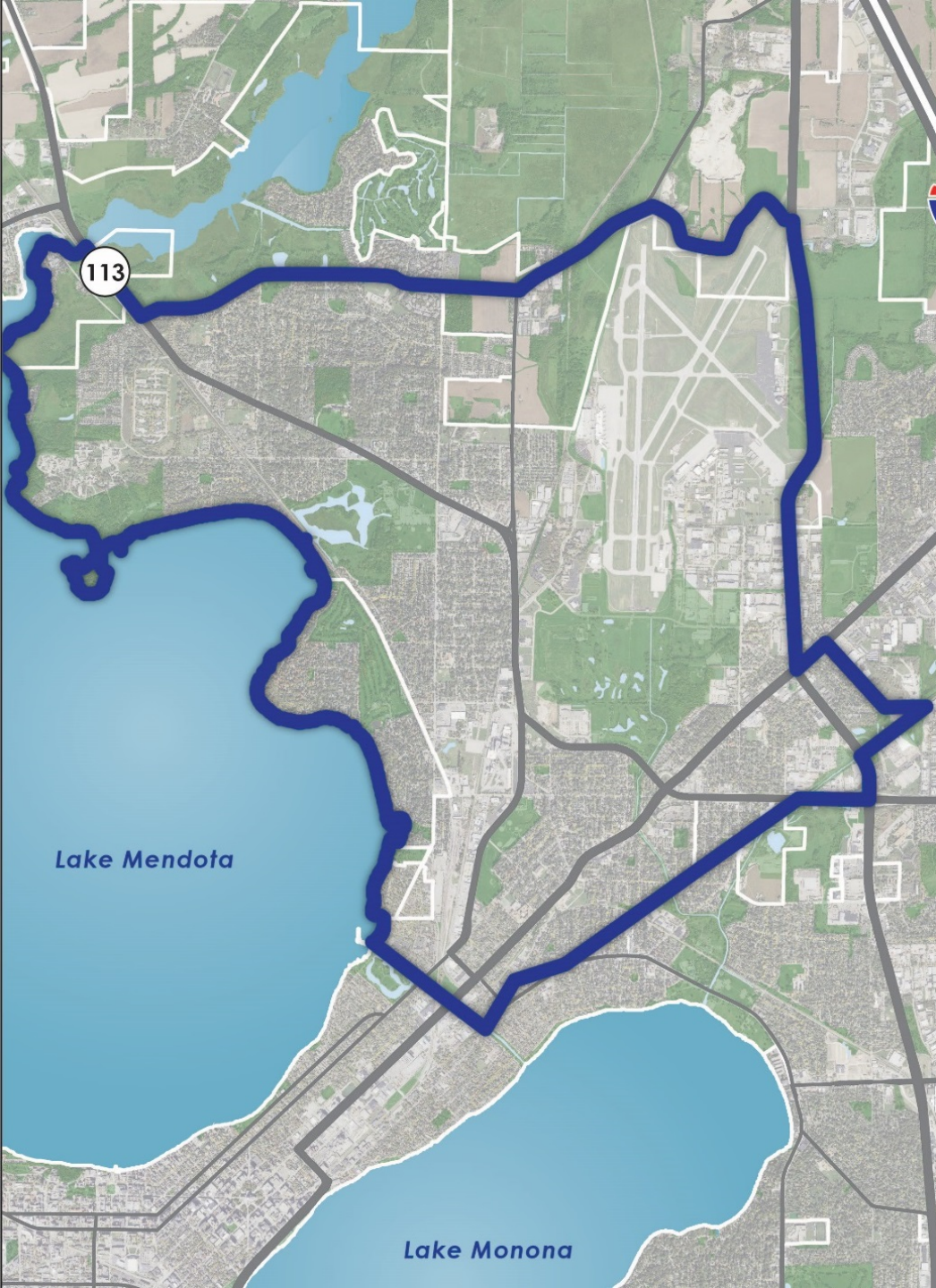
-  201 – 299 Employees
-  300 – 499 Employees
-  500 – 1,999 Employees
-  2,000+ Employees





PUBLIC LAND

- 32.0 % Publicly Owned
- 18.2 % ROW (Publicly Owned)
- 49.8 % Privately Owned



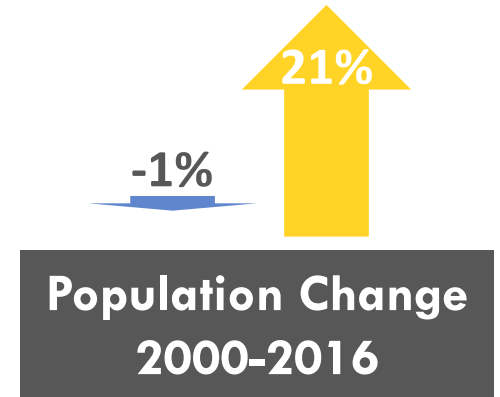
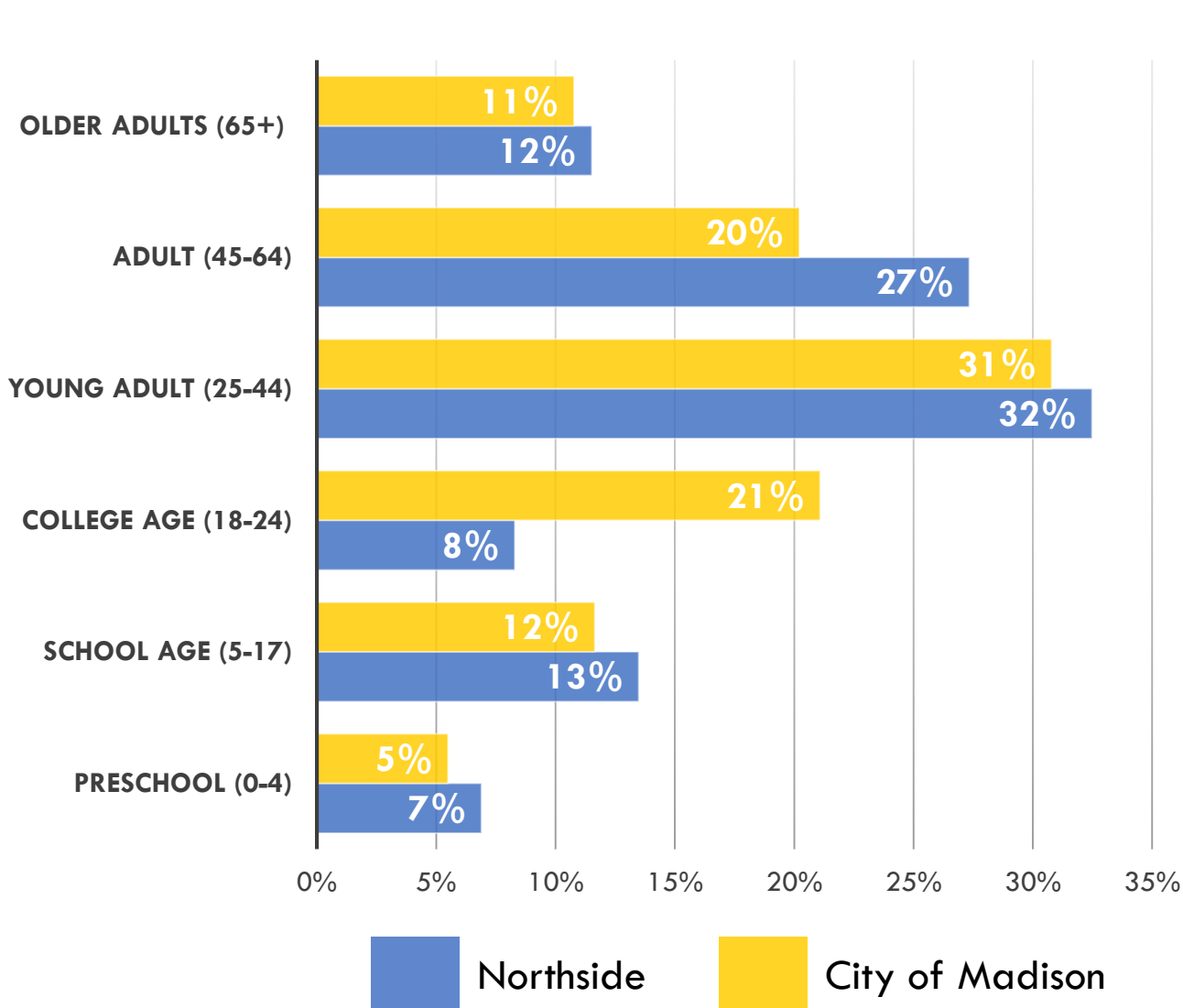
NORTHSIDE DEMOGRAPHIC PROFILE

Lake Mendota

Lake Monona

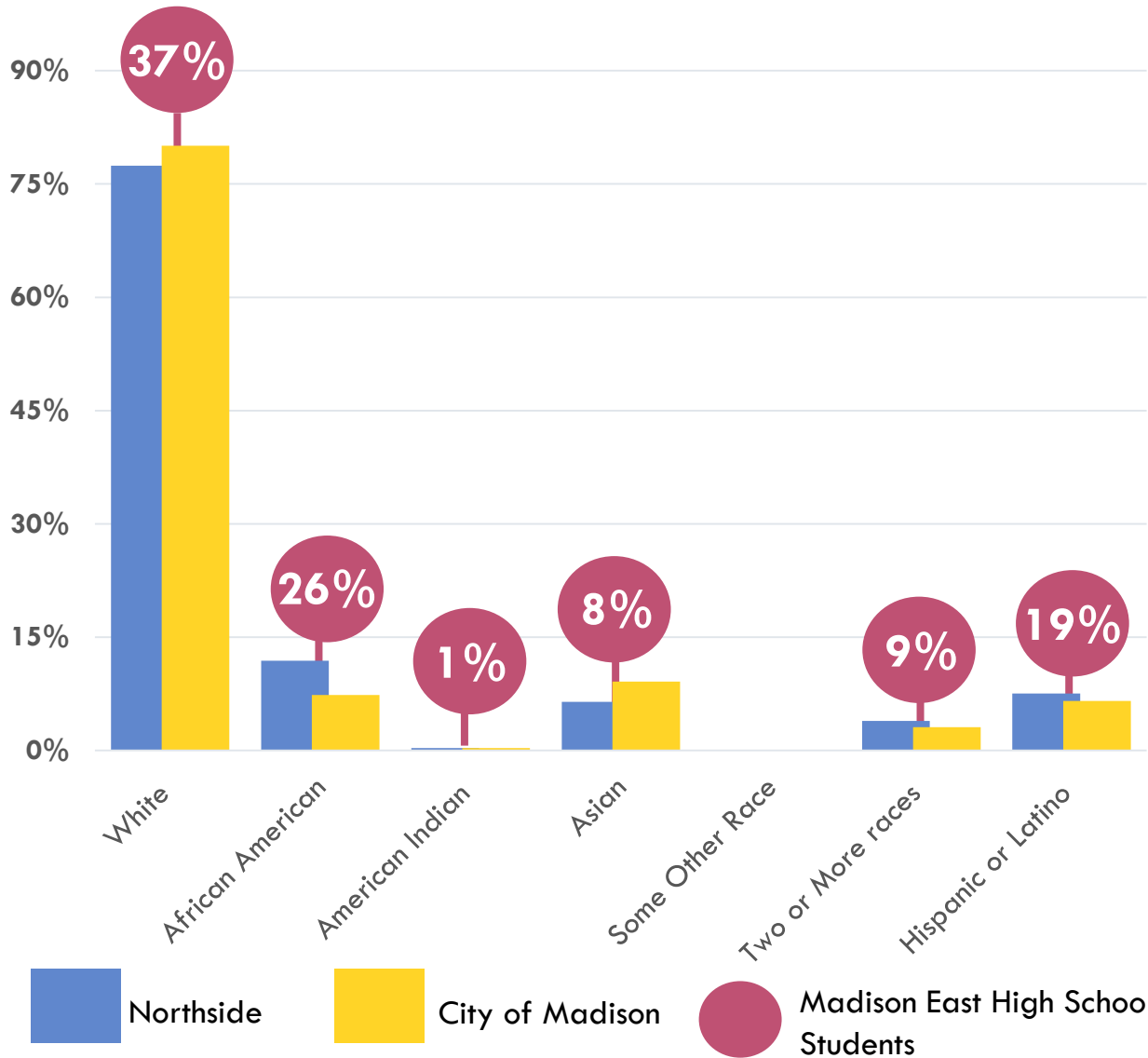
ANALYSIS AND OPPORTUNITIES

NORTHSIDE AGE DISTRIBUTION



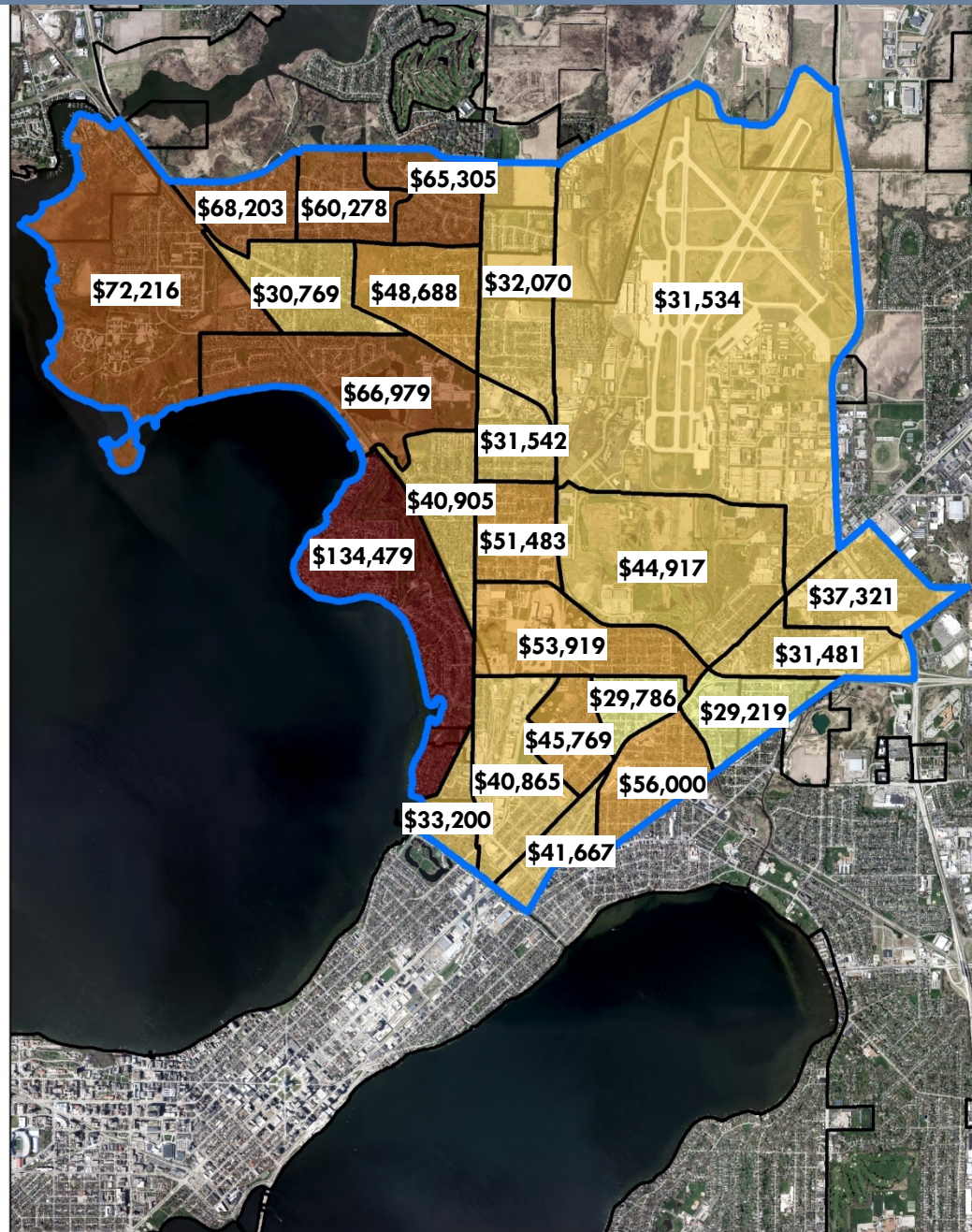
- Decrease in population
- Slightly higher preschool, school aged and elderly population
- Significantly less college aged population

NORTHSIDE RACIAL MAKEUP



- Overall Northside racial makeup is very similar to City of Madison
- Madison East High student population is more diverse

NORTHSIDE INCOME



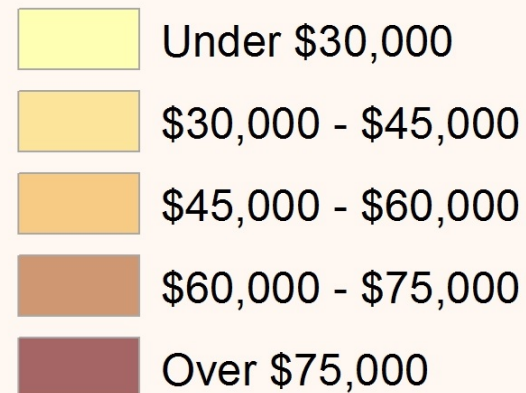
\$47,406
NORTHSIDE

Median Household Income
Average spent on shelter: **\$13,635**

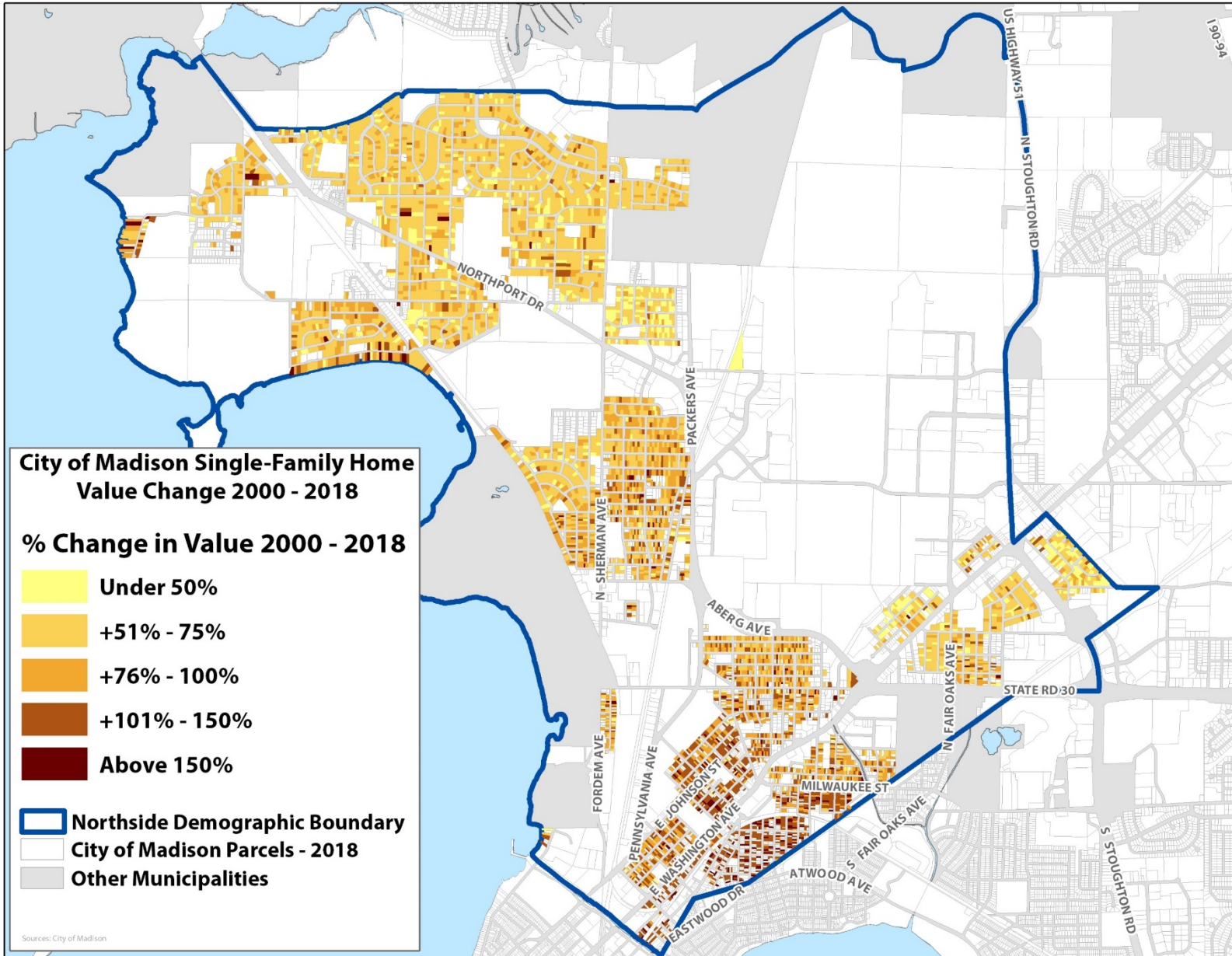
\$56,464
CITY OF MADISON

Median Household Income

Median Household Income 2016

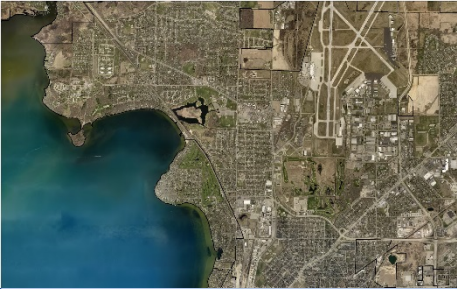


NORTHSIDE HOUSING CHARACTERISTICS



A FEW TAKEAWAYS

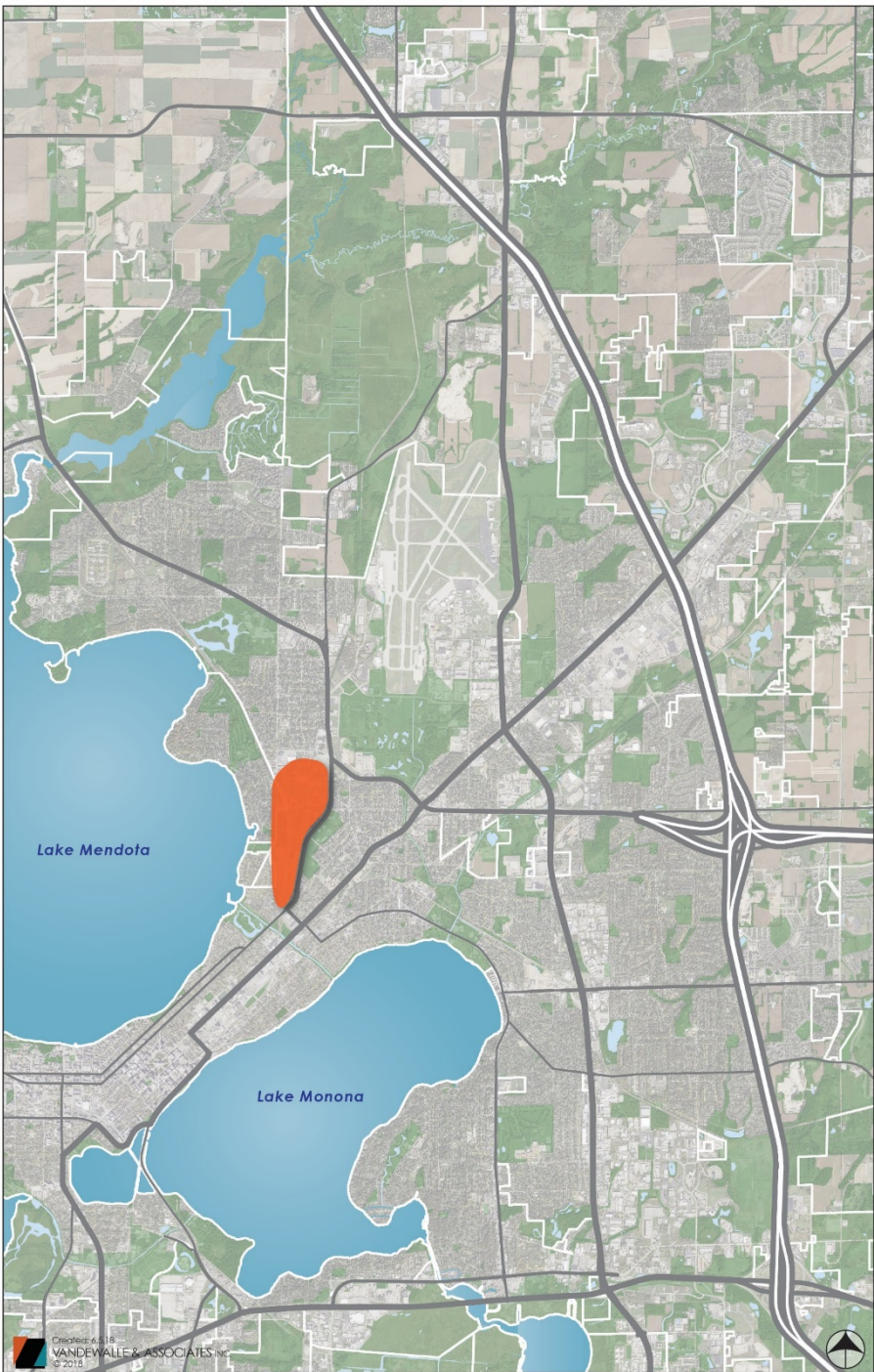
NORTHSIDE AREA



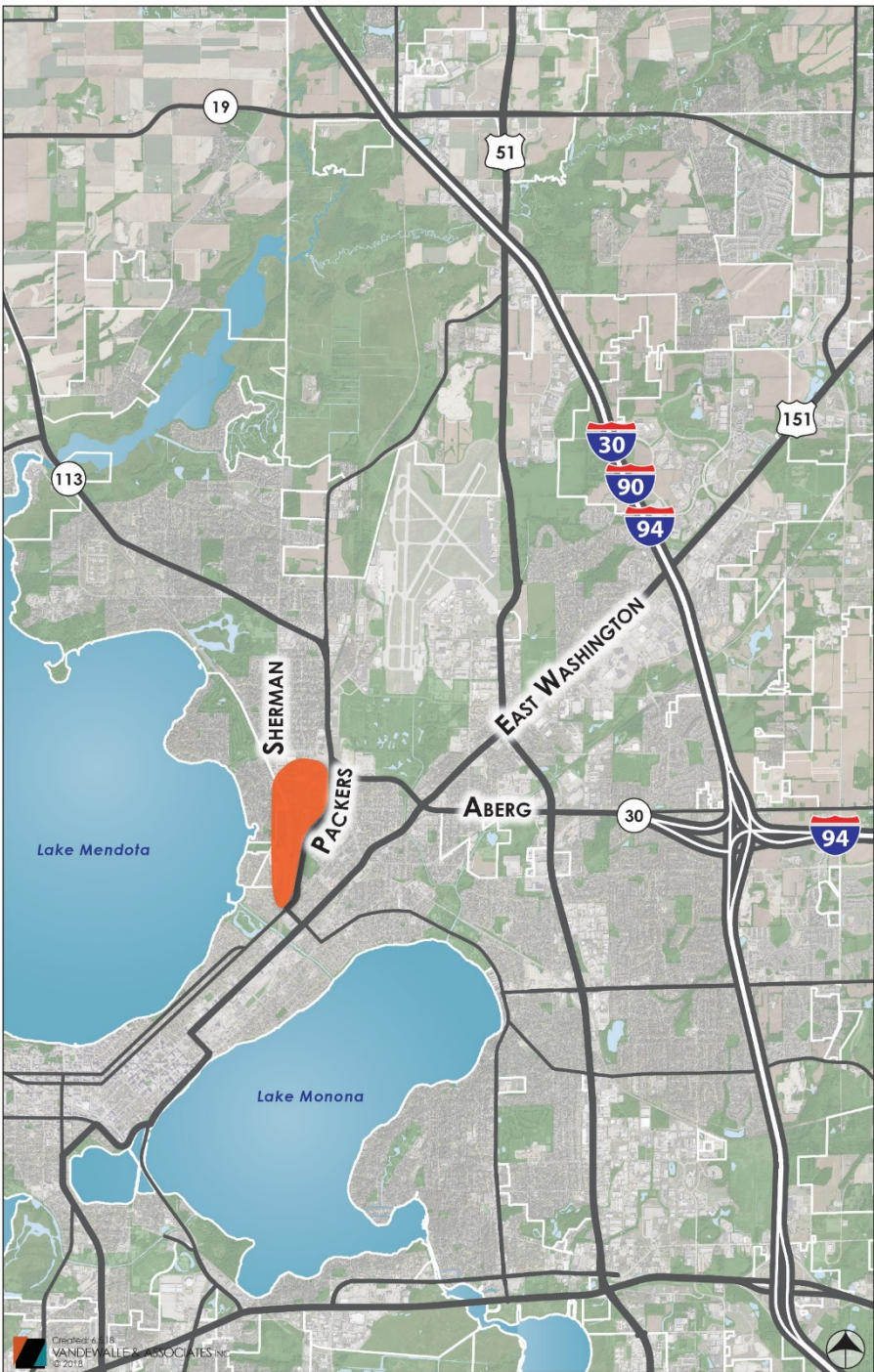
- Diverse economic base serving broader region
- Moderate income, raising residential value creating challenge
- Residential & employment growth slower than other areas, with near east economic momentum
- Next generation of potential workforce more diverse

ASSETS OF THE NORTH SIDE AND CORRIDOR

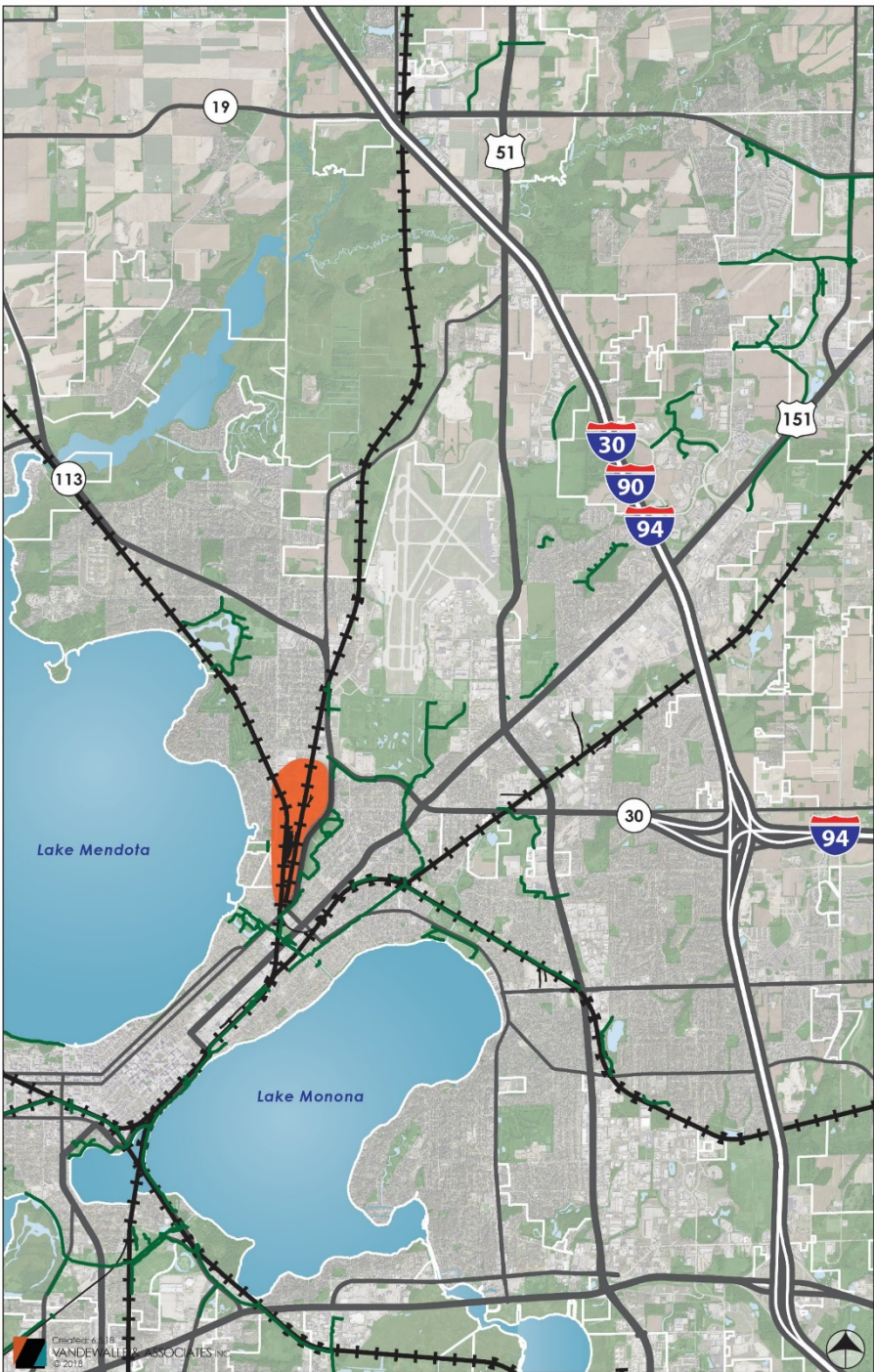
INITIAL ANALYSIS AND OPPORTUNITIES



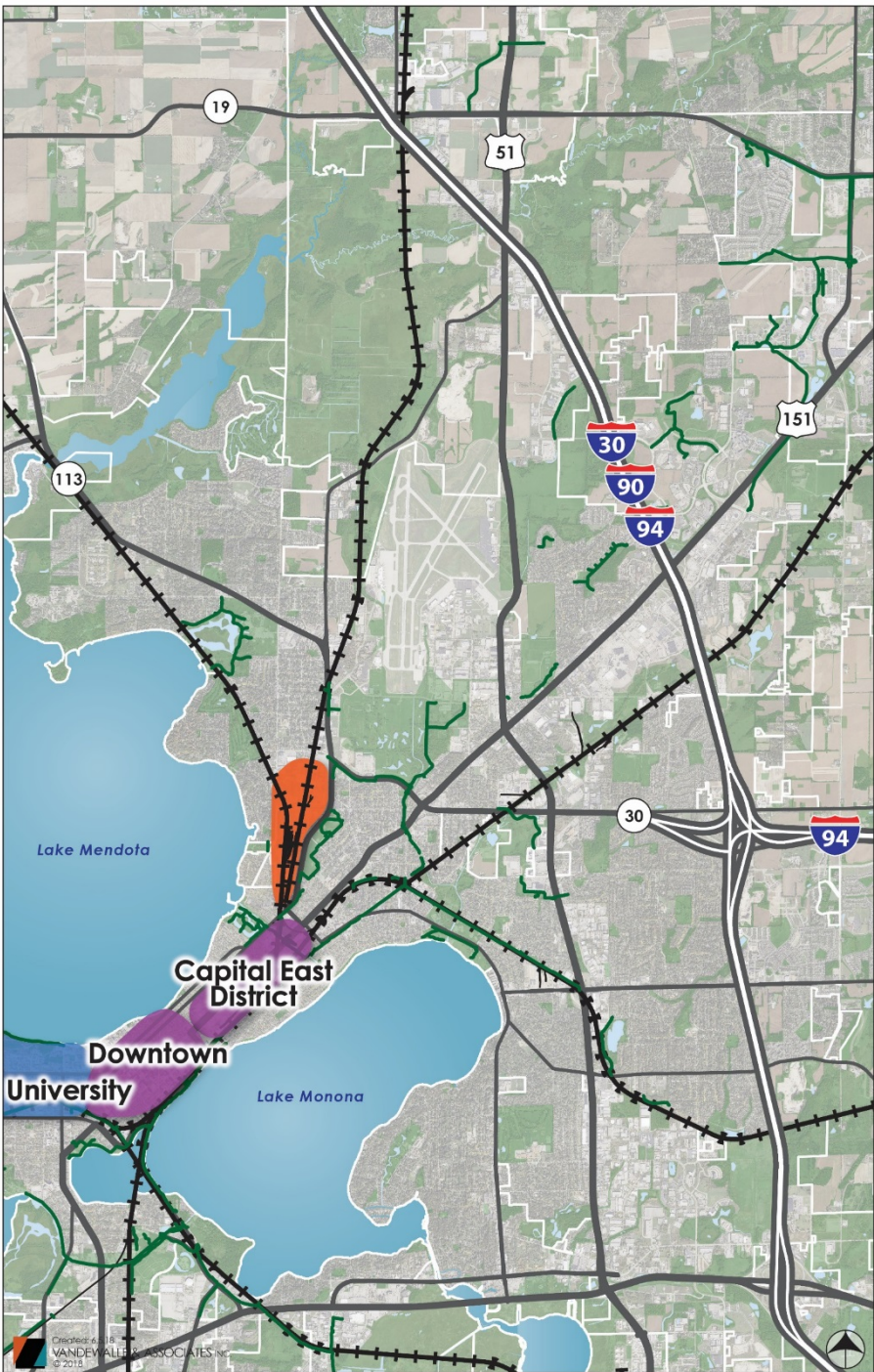
1. Oscar Mayer Site area



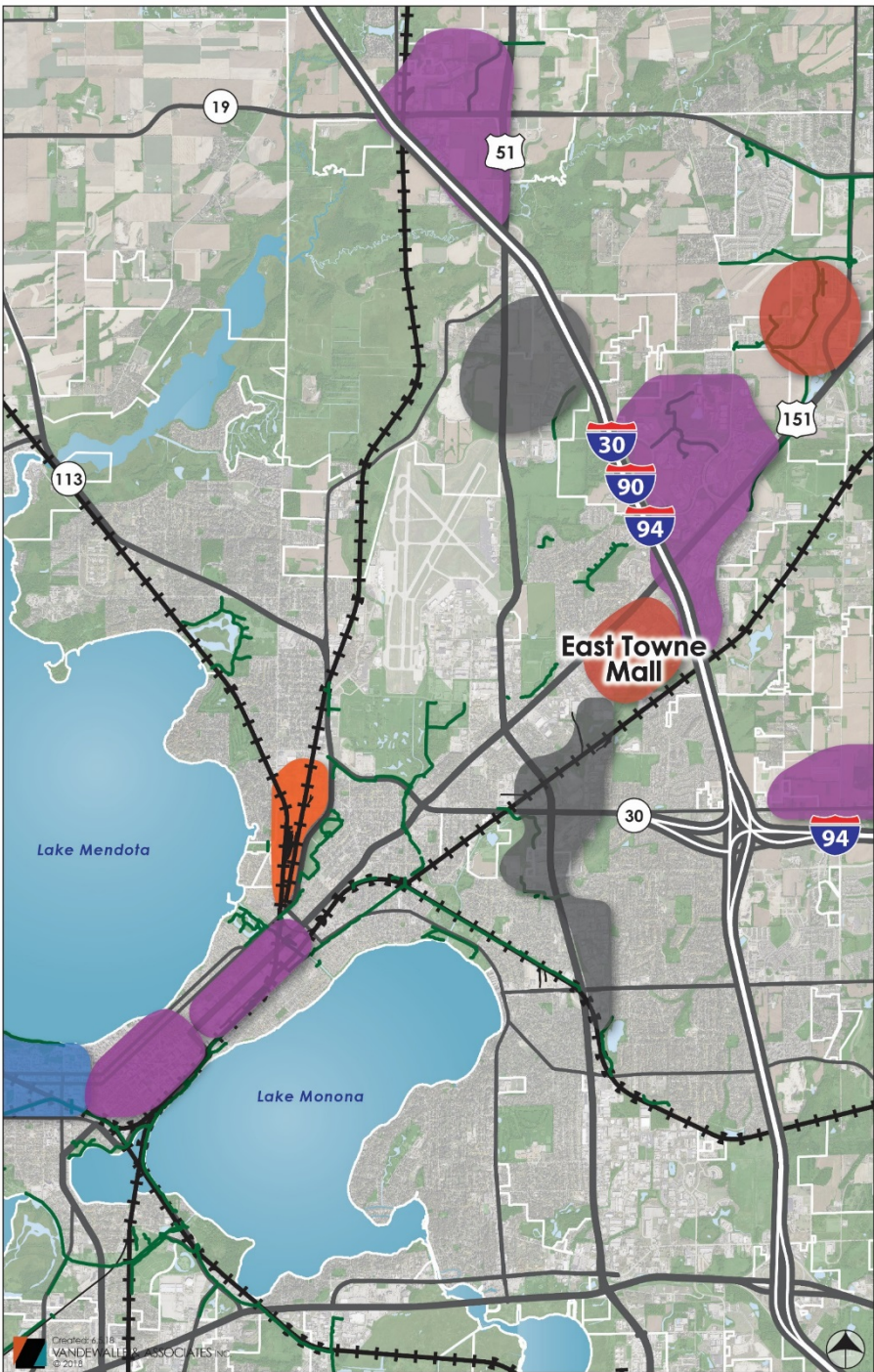
1. Oscar Mayer Site area
2. Major roadways / Bicycle Infrastructure



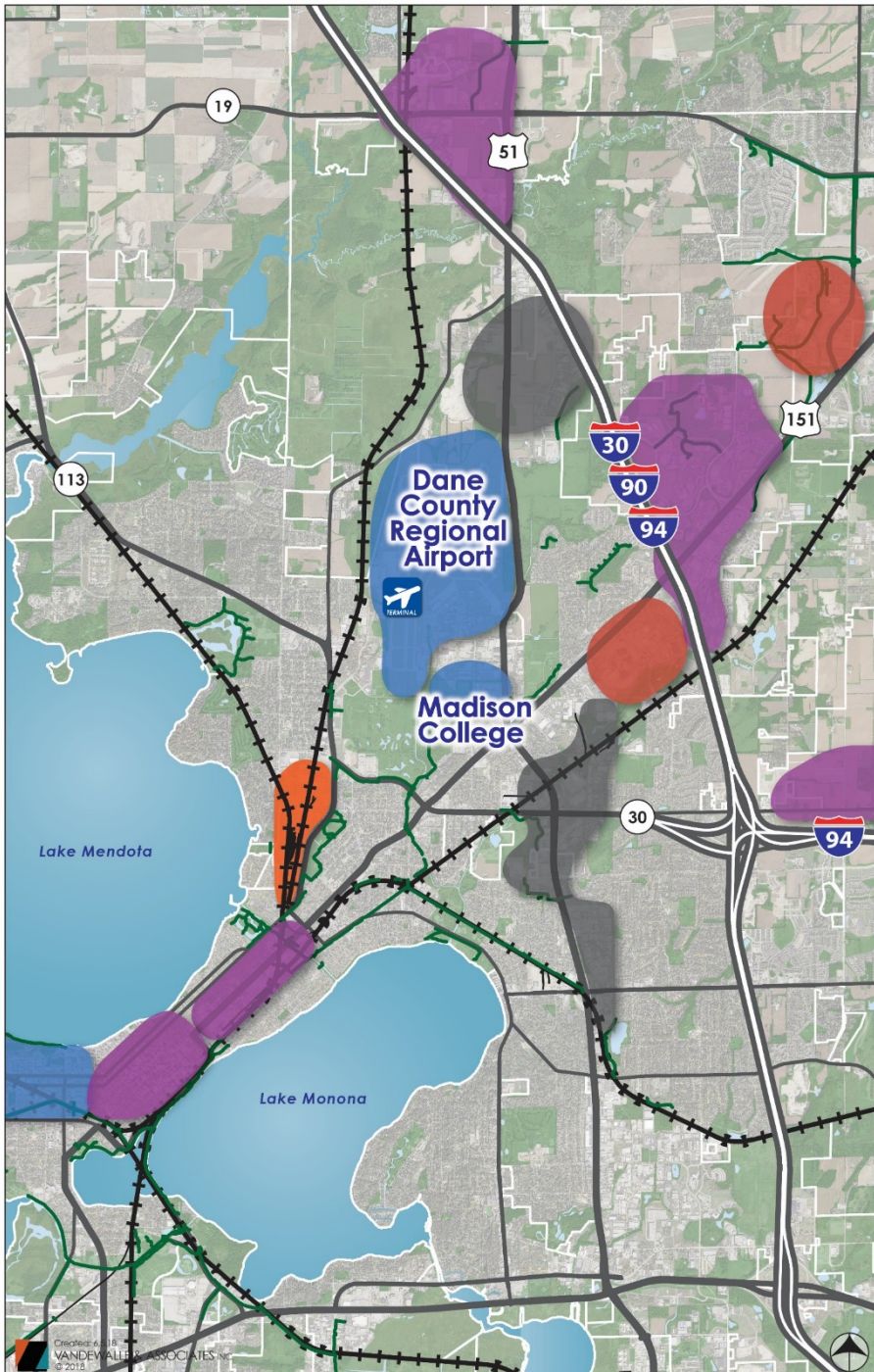
1. Oscar Mayer Site area
2. Major roadways / Bicycle Infrastructure
3. Rail



1. Oscar Mayer Site area
2. Major roadways / Bicycle Infrastructure
3. Rail
4. University, Downtown, Cap East



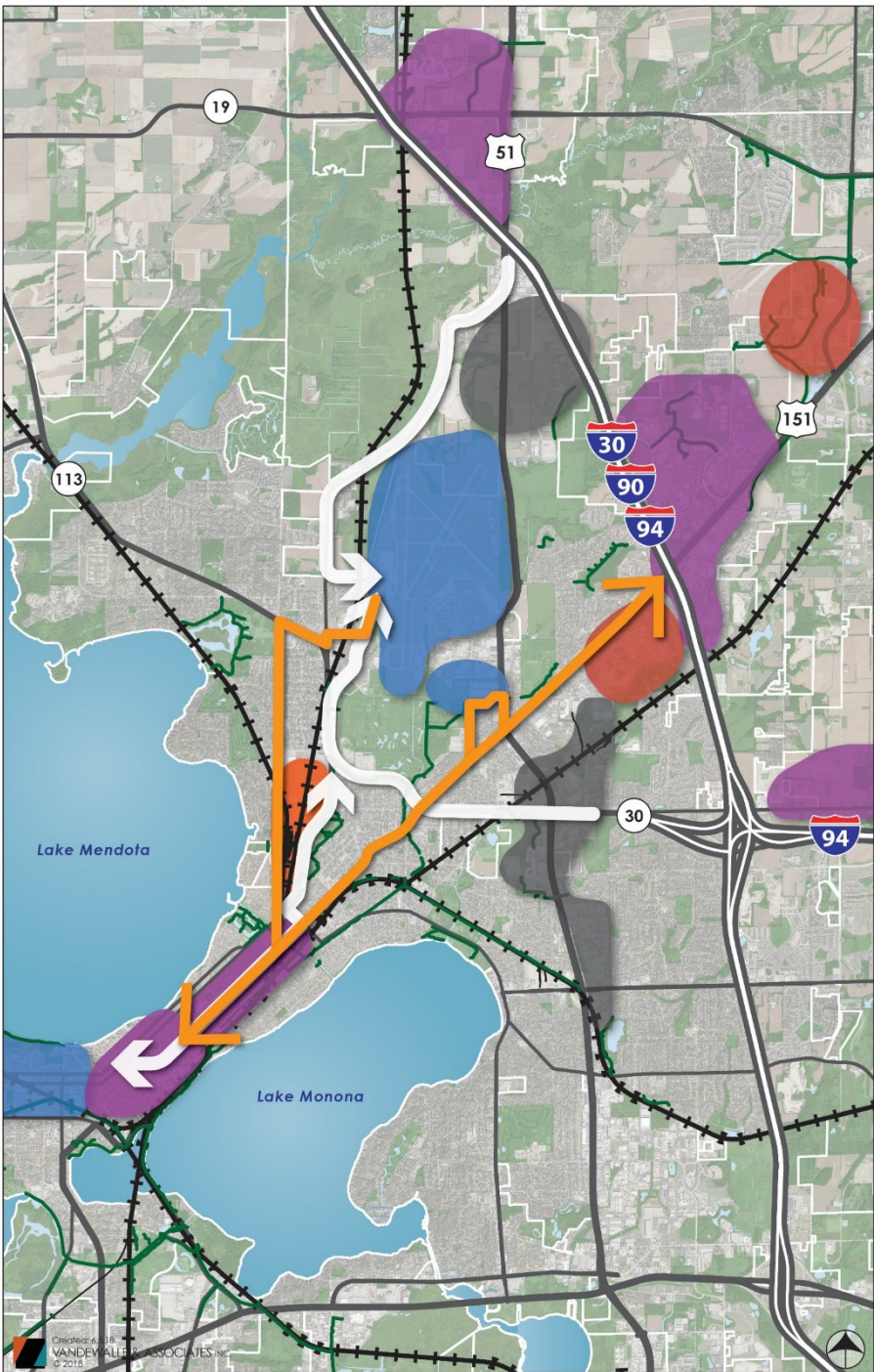
1. Oscar Mayer Site area
2. Major roadways / Bicycle Infrastructure
3. Rail
4. University, Downtown, Cap East
5. Other Employment Areas



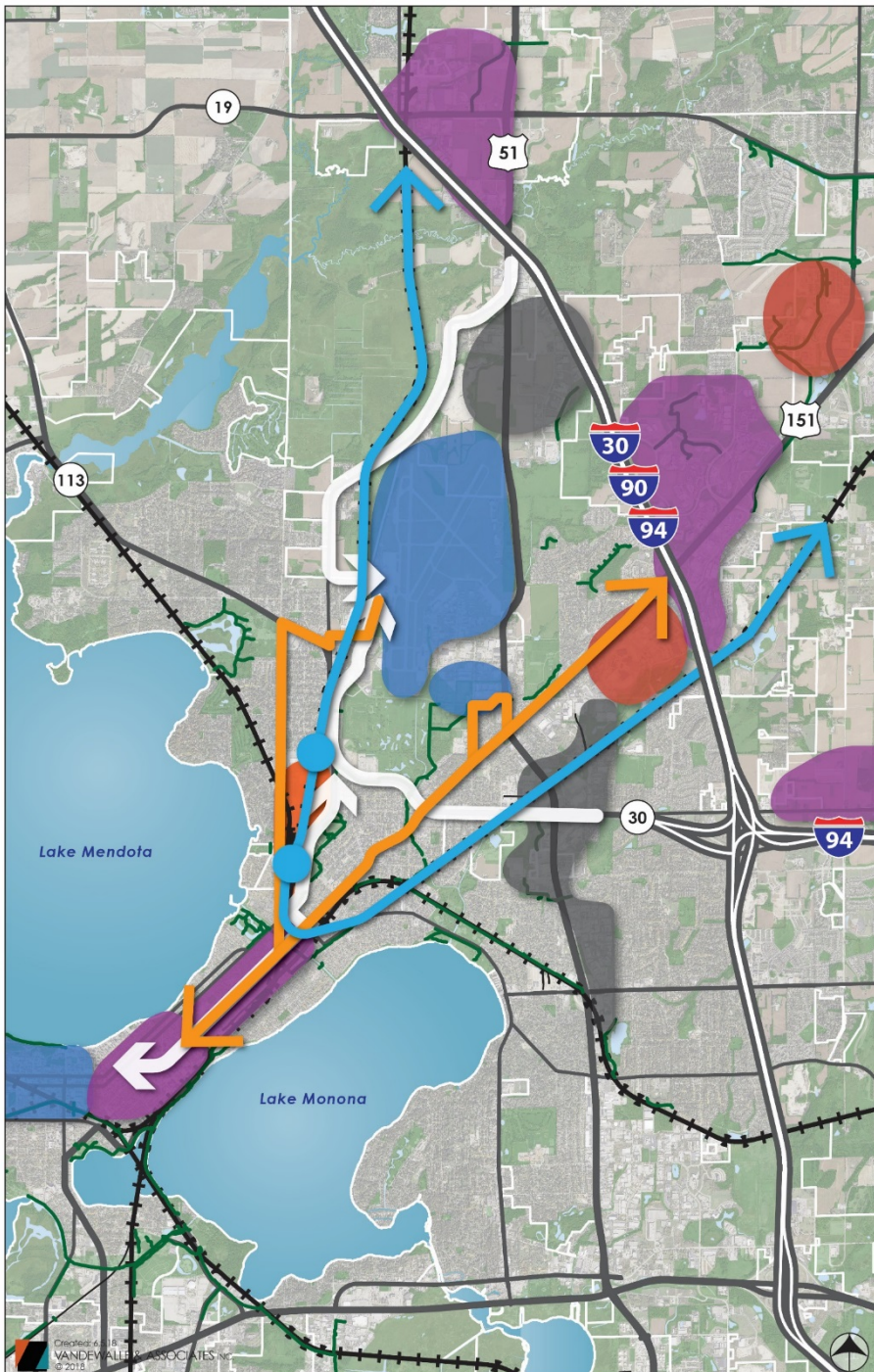
1. Oscar Mayer Site area
2. Major roadways / Bicycle Infrastructure
3. Rail
4. University, Downtown, Cap East
5. Other Employment Areas
6. Madison College and Airport



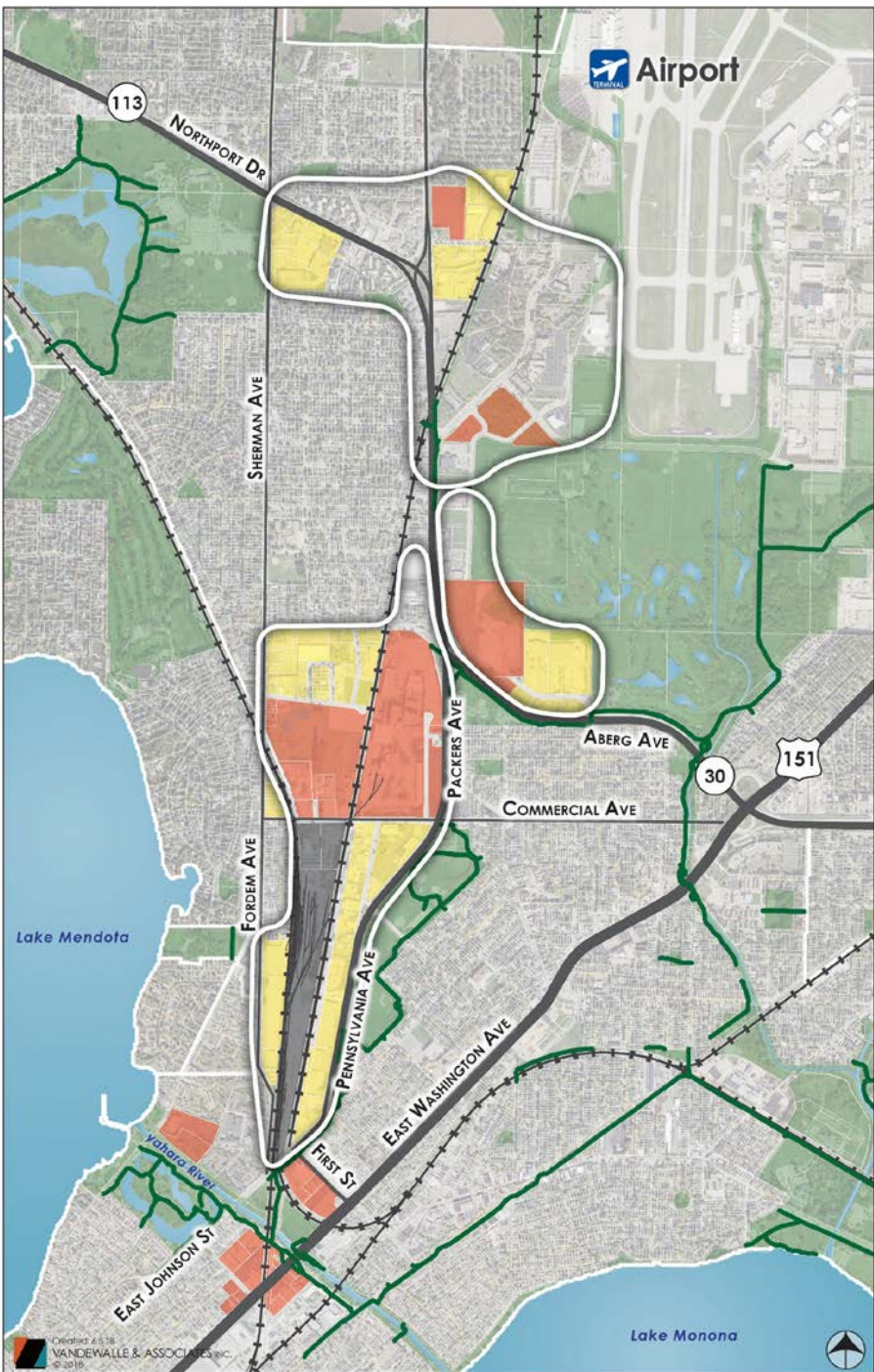
1. Oscar Mayer Site area
2. Major Roadways / Bicycle Infrastructure
3. Rail
4. University, Downtown, Cap East
5. Other Employment Areas
6. Madison College and Airport
7. Airport Access & Gateway Corridor



1. Oscar Mayer Site area
2. Major Roadways / Bicycle Infrastructure
3. Rail
4. University, Downtown, Cap East
5. Other Employment Areas
6. Madison College and Airport
7. Airport Access & Gateway Corridor
8. Planned BRT

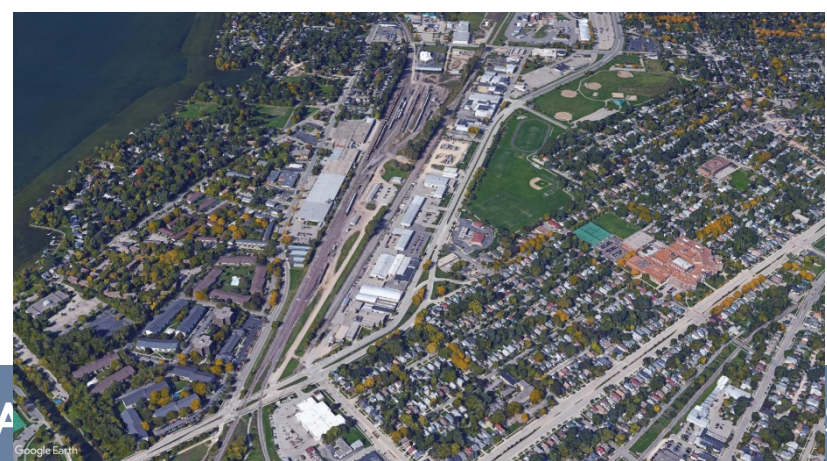
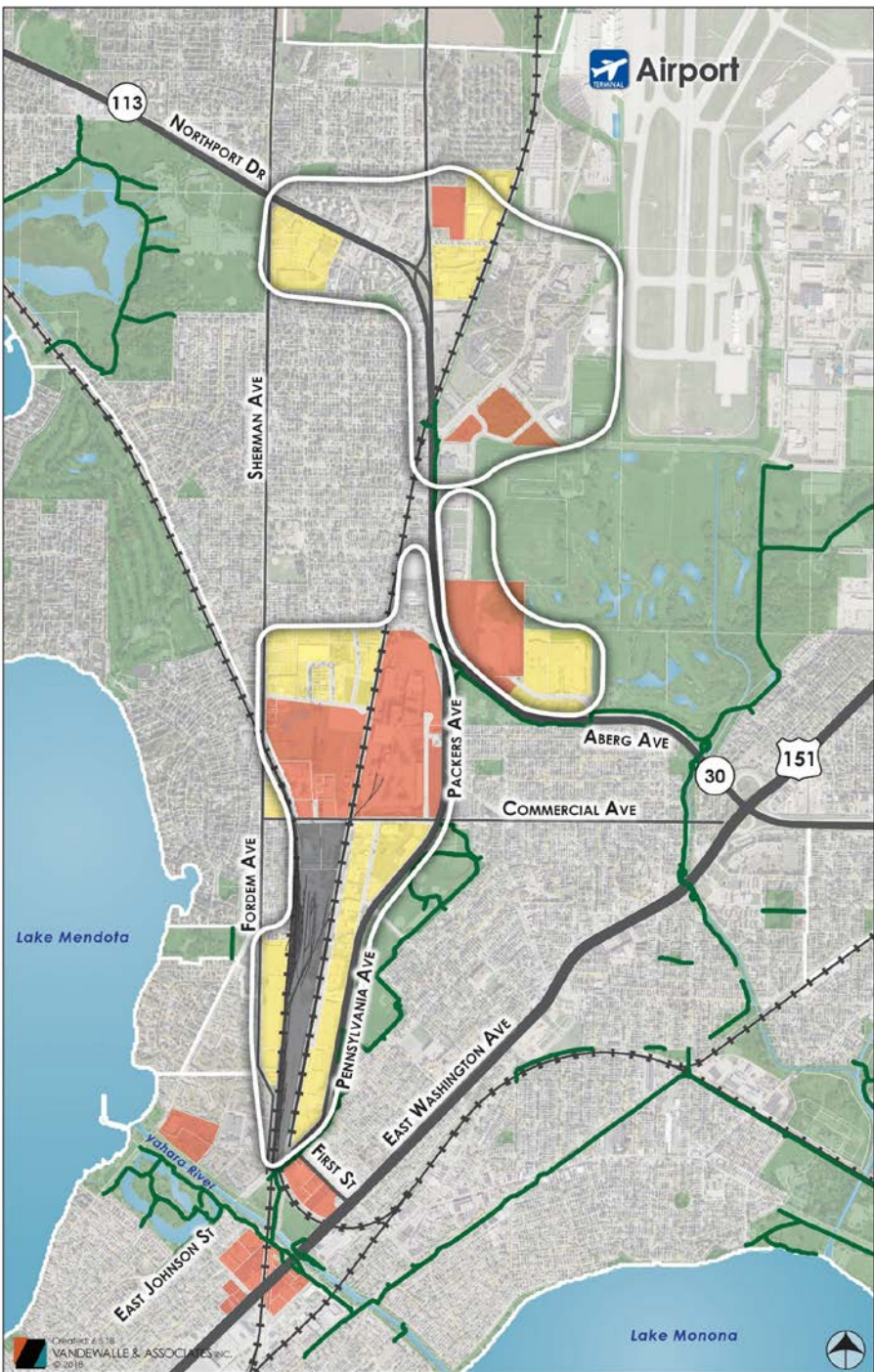


1. Oscar Mayer Site area
2. Major Roadways / Bicycle Infrastructure
3. Rail
4. University, Downtown, Cap East
5. Other Employment Areas
6. Madison College and Airport
7. Airport Access & Gateway Corridor
8. Planned BRT
9. Designated Corridor for Intercity Passenger Rail



POTENTIAL REDEVELOPMENT & INFILL

- Short/Medium Term
- Medium/Long Term



OSCAR SITE AREA ASSETS

INITIAL ANALYSIS AND OPPORTUNITIES

EXISTING INFRASTRUCTURE

Open Space (Public & Private)

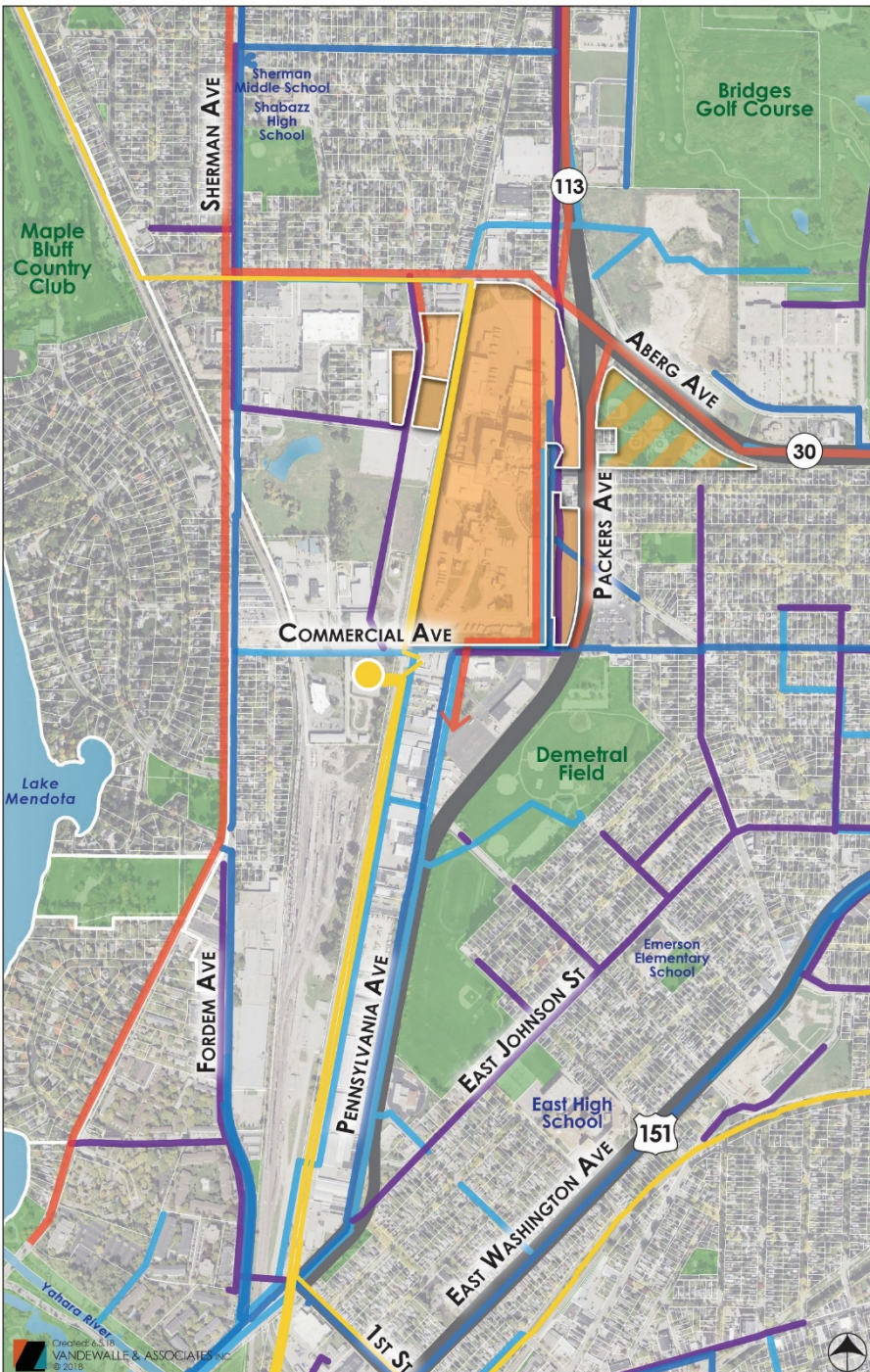
Electric Transmission Lines &
Substation

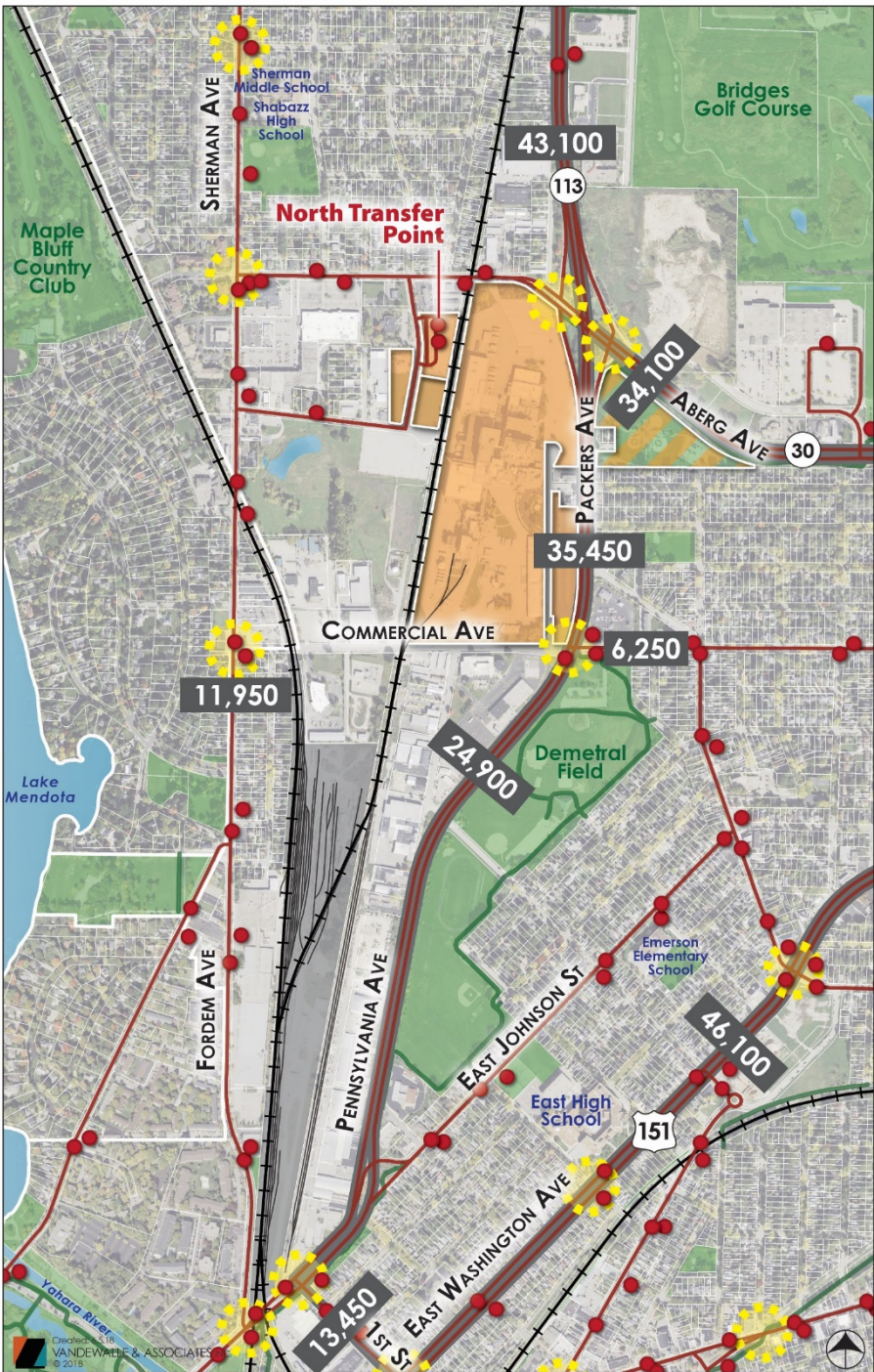
Fiber

Sanitary Sewer Lines (10"+)

Water Lines (10"+)

Storm Sewer Lines (36"+)





TRANSPORTATION

Existing Bus Routes & Stops

Signalized Intersections

Traffic Counts

Existing Bike Trails

Rail Lines & Spurs

A FEW TAKEAWAYS

SITE AREA



- Unmatched infrastructure & transportation access
- Significant non residential acreage will transition
- Building stock/allows for lower-priced rents

SENSE OF **SCALE**
OF THE CORRIDOR

INITIAL ANALYSIS AND OPPORTUNITIES

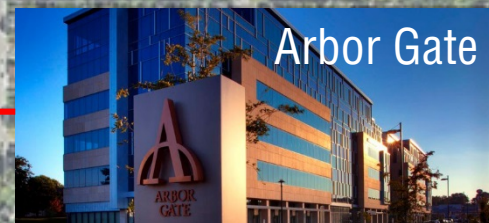
Spectrum Brands



Capital East

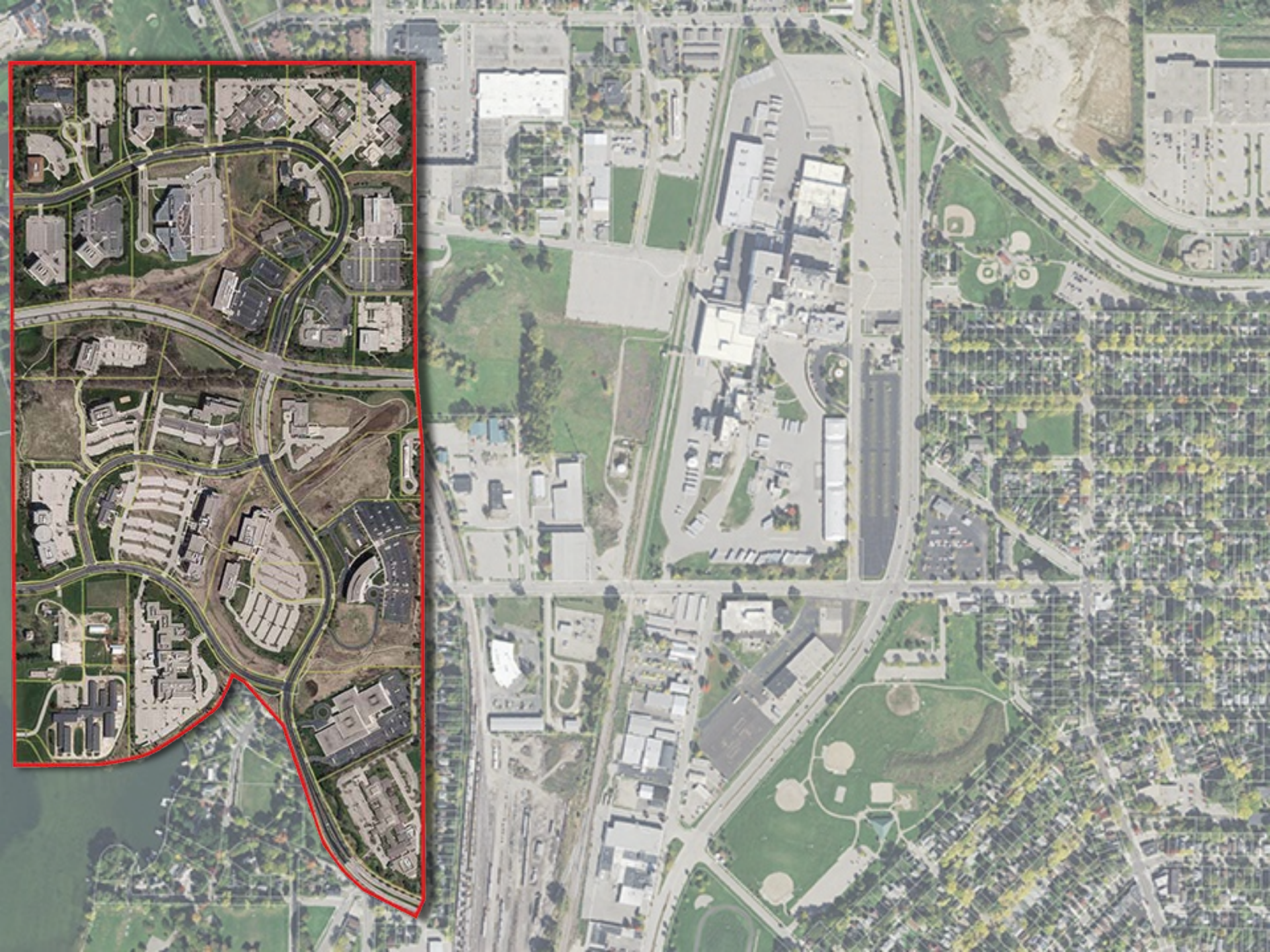


Arbor Gate



Cuna Mutual





DISCUSSION

ANALYSIS

1. Clarifying questions and comments?
2. What are key analysis takeaways?
3. Any additional analysis?

BIG PICTURE OPPORTUNITIES

OPPORTUNITY 1

Potential Target Economies & Cluster Development

ADVANCING CLUSTERS THAT COULD DRIVE AN ECONOMIC TRANSITION

- Maintain industry sector diversity
- Sectors with full spectrum of jobs



OPPORTUNITY 2

Digital-Driven Industry 4.0- Next Generation of Manufacturing



A PLACE TO MAKE THINGS

- Digitalization of all economic sectors
- Next wave of technology adoption in manufacturing
- Advanced analytics, augmented reality, IOT – machines, devices, sensors, and people
- Additive manufacturing and advanced robotics
- Zoning, infrastructure/fiber, and buildings

OPPORTUNITY 3

Food Manufacturing & Aggregation Distribution



FOOD INNOVATION CORRIDOR

- Leverage northside food innovation assets and future public market
- Site cold storage and docking asset for distribution
- Oscar/Pennsylvania /Packers corridor building stock for production scale
- Madison opportunity to be marketplace/hub for regional products(driftless/Madison map)

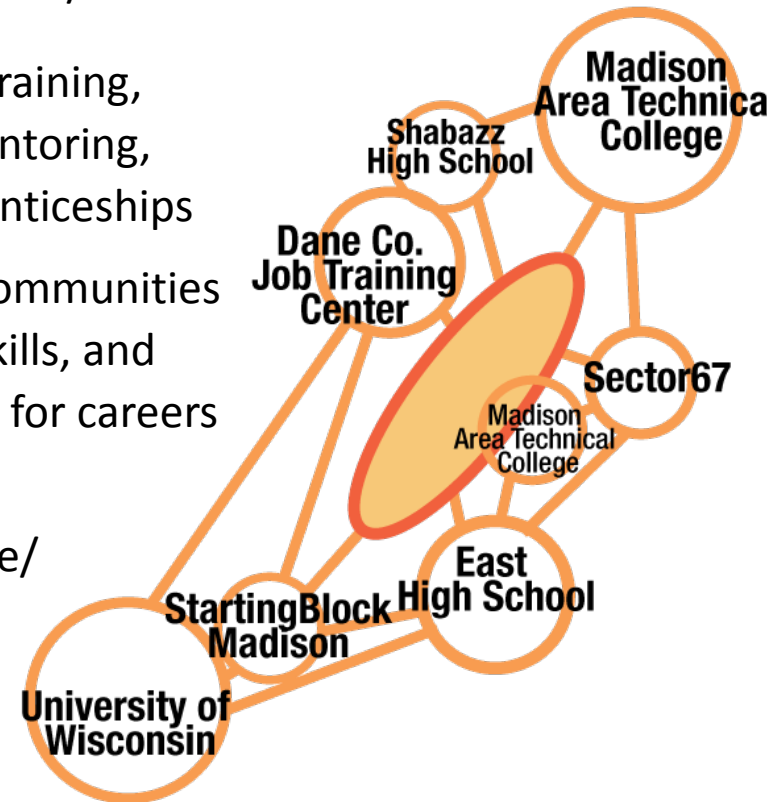
OPPORTUNITY 4

Place-Based Workforce Collaborative



FOSTER WORKFORCE TO FUEL THE NEXT NORTHSIDE ECONOMY

- Significant assets - proximity matters
- Youth pipeline and Educational career pathways for north/eastside
- Inspire youth, Training, internships, mentoring, company apprenticeships
- Equip diverse communities with training, skills, and access required for careers in technology
- Major Corporate/Educational partnership



OPPORTUNITY 5

Home for Next Large Corporate Campus to Go to Scale



WALKABLE EMPLOYMENT DISTRICT

- Company every 5 years on average
- Innovation infrastructure/StartingBlock
- Full spectrum of urban workforce with in 10 minutes
- Healthtech, Medical biotech, Gaming, IT,
- Prime infrastructure/ large sites
- Potential to Land bank

OPPORTUNITY 6

Creating an Inclusive Mixed-Use District



A PLACE TO GATHER

- Identifiable, authentic district for the Northside and employment district
- Pedestrian-oriented form and uses (specialized mix of housing, shops, food, music, services)
- Integration of legacy commercial areas on Fordem
- Critical to today's employment areas



GOODS AND PRODUCTS

- Goods and products
- Rail access and truck/highway access
- Airport/Foreign Trade Zone

OPPORTUNITY 7

Multi-Modal & Transit-Oriented Hub



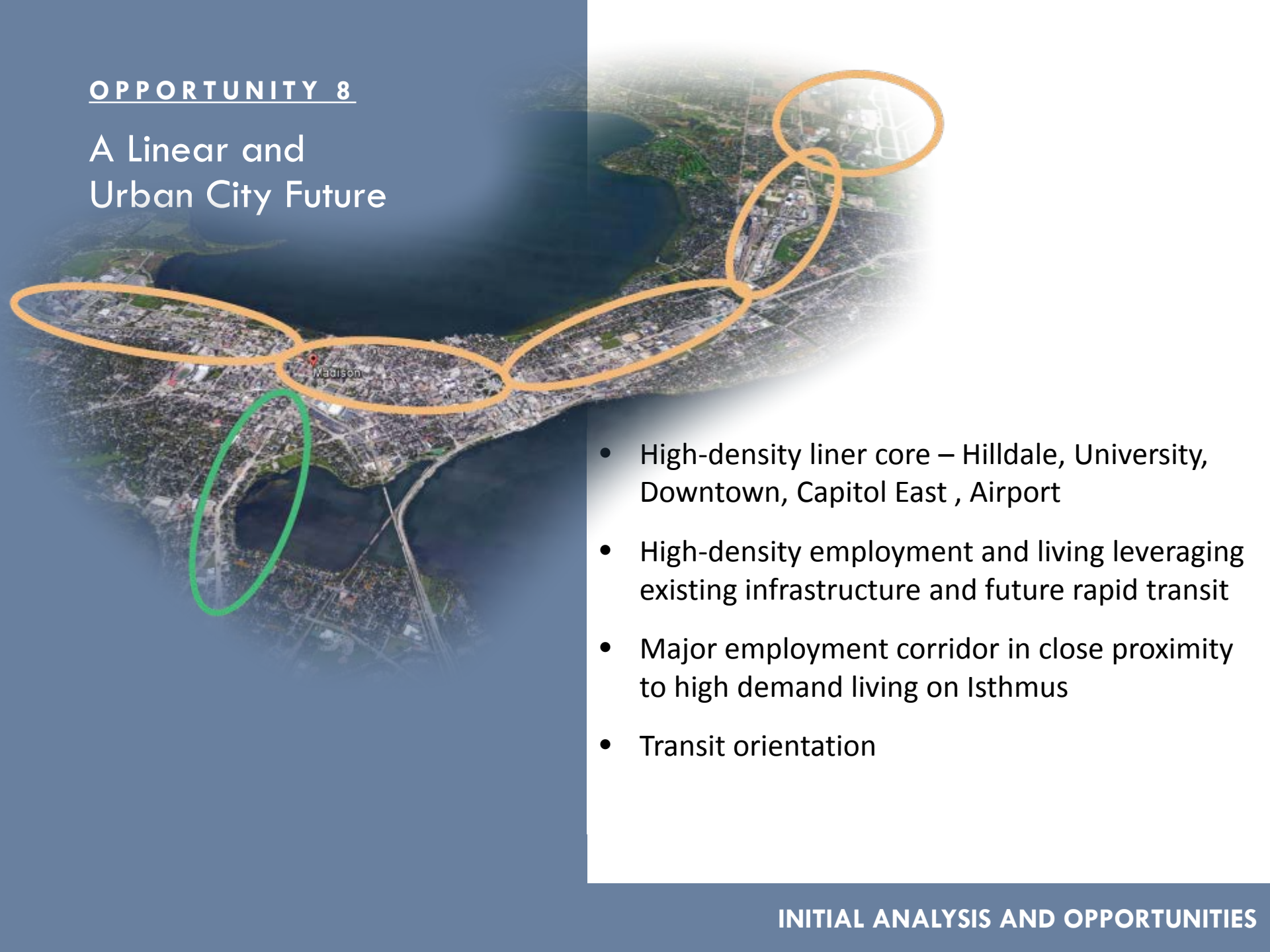
PEOPLE

- Bus/North Transfer Point
- Future BRT
- Future InterCity high-Speed Rail
- Bike network
- Future Rail transit



OPPORTUNITY 8


A Linear and Urban City Future

- 
- An aerial photograph of Madison, Wisconsin, showing the city's layout along the Isthmus. The city is divided by the Koshongong and Kegonsa Rivers. Several areas are circled: a large orange circle encompasses the central business district and downtown area; a smaller orange circle highlights a residential area to the east; a green circle highlights a residential area to the south. The word "Madison" is visible on the map.
- High-density liner core – Hilldale, University, Downtown, Capitol East , Airport
 - High-density employment and living leveraging existing infrastructure and future rapid transit
 - Major employment corridor in close proximity to high demand living on Isthmus
 - Transit orientation

OPPORTUNITY 9

Proactive & Comprehensive Social Equity & Economic Framework

WHERE ALL PEOPLE CAN ATTAIN THE RESOURCES AND
OPPORTUNITIES THAT IMPROVE THEIR QUALITY OF LIFE AND
ENABLE THEM TO REACH THEIR FULL POTENTIAL

- 
- Boldly preserve and expand affordable and specialized housing/policies – minimizing displacement
 - Mobility & connectivity
 - Cultural fabric and businesses
 - Specialized education and workforce training
 - Diverse leadership and partnerships structure



OPPORTUNITY 1

Potential Target Economies & Cluster Development



OPPORTUNITY 2

Digital-Driven Industry 4.0- Next Generation of Manufacturing



OPPORTUNITY 3

Food Manufacturing & Aggregation Distribution

OPPORTUNITY 4

Place-Based Workforce Collaborative

OPPORTUNITY 5

Home for Next Large Corporate Campus to Go to Scale



OPPORTUNITY 6

Creating an Inclusive Mixed-Use District



OPPORTUNITY 7

Multi-Modal & Transit-Oriented Hub

OPPORTUNITY 8

A Linear and Urban City Future



OPPORTUNITY 9

Proactive & Comprehensive Social Equity & Economic Framework

DISCUSSION

OPPORTUNITIES

1. What big picture opportunities resonate with you?
2. What other big picture opportunities should be considered?



OBJECTIVE BUCKETS

Equity and Inclusion

Transportation

Affordability

Employment & Workforce

Urban Form and Intent

Sustainability

Economics and Industry Focus

Maintaining
Neighborhood
Integrity/Cohesion

Land Use and Place

OBJECTIVE
BUCKETS

