# Oscar Mayer Strategic Assessment

## Meeting Schedule and Timeline

<table>
<thead>
<tr>
<th>May 8</th>
<th>June 12</th>
<th>July 9</th>
<th>August 13</th>
<th>September 24</th>
<th>October 23</th>
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</thead>
</table>
| • Analysis categories  
  • Committee priorities  
  • Interview list | • Opportunity analysis/assessment review  
  • Objective categories | • Follow-up analysis review  
  • Constituent Rep – engagement findings | • Committee survey results/redevelopment objectives discussion  
  • Objectives workshop  
  • Boundary discussion  
  • Review key elements of Special Area Plan | • Summary document review  
  • Tools & recommendations  
  • Review of RFP for Special Area Plan | • Report adoption by the OMSAC |

## Initial Analysis and Opportunities

### Assessment & Opportunity Analysis
- Interviews

### Redevelopment Objectives & Study Boundary
- Northside Constituent Representative Engagement
- Public Input Event

### Summary Document
- Northside Constituent Representative Engagement
OSCAR MAYER AREA STRATEGIC ASSESSMENT
INITIAL ANALYSIS AND OPPORTUNITIES

June 12, 2018
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
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%

High-Skilled Worker Growth and Income

Household Income

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

- To Twin Cities
- To Milwaukee
- To Chicago
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

- **Oscar Mayer/Packers Corridor**: $286,187 | 9%
- **East Towne**: $930,088 | 57%
- **Cap East**: $952,433 | 178%
- **Greenway Center**: $1,570,510 | 71%
- **Novation**: $1,043,903 | 468%
- **City of Madison**: $540,510 | 122%
- **W/O Oscar Mayer Property**: $294,277 | 78%
- **Stoughton Road**: $367,295 | 77%
### Oscar Mayer Impacts

<table>
<thead>
<tr>
<th>JOBS</th>
<th>1970’s – 4,000 jobs</th>
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<tbody>
<tr>
<td></td>
<td>2013- 1,300 jobs</td>
</tr>
<tr>
<td></td>
<td>2017 – 640 final job loss (140 corporate, 500+ production)</td>
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<tr>
<td></td>
<td>73% of production workers were Dane County residents</td>
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<tr>
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<td>23% were Northside residents (2015)</td>
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<table>
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<tr>
<th>TAX BASE</th>
<th>2017 - $23.5M (to be reassessed June 2018)</th>
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<tr>
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<td>2003 - $34M</td>
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<table>
<thead>
<tr>
<th>UTILITIES</th>
<th>$232,000 reduction in water utility income</th>
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<tr>
<td></td>
<td>$500,000 reduction in annual wastewater treatment income</td>
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<tr>
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<td>$3 million gas and electric revenues</td>
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<tr>
<th>OTHER</th>
<th>Reduction in philanthropic resources to community</th>
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<tbody>
<tr>
<td></td>
<td>Loss of customer base/revenues for nearby retail, restaurants, and service businesses</td>
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</tbody>
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Sources: City of Madison, Madison Gas & Electric, Madison Water Utility, Madison Metropolitan Sewerage District, Workforce Development Board of South Central Wisconsin, Wisconsin State Journal.

**Initial Analysis and Opportunities**
A FEW TAKEAWAYS

- 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

<table>
<thead>
<tr>
<th>INDUSTRIES</th>
<th>10 min zone</th>
<th>City of Madison</th>
<th>Dane County</th>
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</thead>
<tbody>
<tr>
<td>Agriculture/Mining</td>
<td>0.3%</td>
<td>0.1%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Construction</td>
<td>3.3%</td>
<td>2.2%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>7.5%</td>
<td>6.5%</td>
<td>4.1%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>1.9%</td>
<td>8.2%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>9.7%</td>
<td>12.7%</td>
<td>9.3%</td>
</tr>
<tr>
<td>Transportation/Utilities</td>
<td>2.7%</td>
<td>2.7%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Information</td>
<td>2.1%</td>
<td>1.3%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Finance/Insurance/Real Estate</td>
<td>7.8%</td>
<td>6.6%</td>
<td>9.4%</td>
</tr>
<tr>
<td>Services</td>
<td>59.4%</td>
<td>36.0%</td>
<td>53.0%</td>
</tr>
<tr>
<td>Public Administration</td>
<td>5.3%</td>
<td>23.2%</td>
<td>12.8%</td>
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</table>

- 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
INITIAL ANALYSIS AND OPPORTUNITIES

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
INITIAL ANALYSIS AND OPPORTUNITIES

NORTHSIDE
DEMOGRAPHIC
PROFILE
INITIAL ANALYSIS AND OPPORTUNITIES

NORTHSIDE AGE DISTRIBUTION

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

Population Change 2000-2016

0% 5% 10% 15% 20% 25% 30% 35%

OLDER ADULTS (65+)
ADULT (45-64)
YOUNG ADULT (25-44)
COLLEGE AGE (18-24)
SCHOOL AGE (5-17)
PRESCHOOL (0-4)

Northside City of Madison
• Overall Northside racial makeup is very similar to City of Madison
• Madison East High student population is more diverse
INITIAL ANALYSIS AND OPPORTUNITIES

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
- Under $30,000
- $30,000 - $45,000
- $45,000 - $60,000
- $60,000 - $75,000
- Over $75,000
NORTHSIDE HOUSING CHARACTERISTICS

City of Madison Single-Family Home Value Change 2000 - 2018

% Change in Value 2000 - 2018
- Under 50%
- +51% - 75%
- +76% - 100%
- +101% - 150%
- Above 150%

Northside Demographic Boundary
City of Madison Parcels - 2018
Other Municipalities

Sources: City of Madison
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
1. Oscar Mayer Site area
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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
INITIAL ANALYSIS AND OPPORTUNITIES

POTENTIAL REDEVELOPMENT & INFILL

- Short/Medium Term
- Medium/Long Term
INITIAL ANALYSIS AND OPPORTUNITIES

Potential Redevelopment & Infill

Lake Mendota

Airport

Desired Repurposing
Flexibility
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”+)
INITIAL ANALYSIS AND OPPORTUNITIES

TRANSPORTATION

Existing Bus Routes & Stops
Signalized Intersections
Traffic Counts
Existing Bike Trails
Rail Lines & Spurs
A FEW TAKEAWAYS

• Unmatched infrastructure & transportation access
• Significant non residential acreage will transition
• Building stock/allows for lower-priced rents
SENSE OF SCALE
OF THE CORRIDOR
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
Opportunity 7
Multi-Modal & Transit-Oriented Hub

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

**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

• 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
<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Description</th>
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<tbody>
<tr>
<td>1</td>
<td>Potential Target Economies &amp; Cluster Development</td>
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<tr>
<td>2</td>
<td>Digital-Driven Industry 4.0- Next Generation of Manufacturing</td>
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<td>8</td>
<td>A Linear and Urban City Future</td>
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<td>9</td>
<td>Proactive &amp; Comprehensive Social Equity &amp; Economic Framework</td>
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DISCUSSION

OPPORTUNITIES

1. What big picture opportunities resonate with you?
2. What other big picture opportunities should be considered?
INITIAL ANALYSIS AND OPPORTUNITIES

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

INITIAL ANALYSIS AND OPPORTUNITIES