

Comprehensive Economic Development Strategy for Southeastern Wisconsin: 2015 - 2020



Seven counties united
around a regional
economic development
strategy



PREPARED BY

THE SOUTHEASTERN WISCONSIN REGIONAL PLANNING COMMISSION
THE MILWAUKEE 7 REGIONAL ECONOMIC DEVELOPMENT PARTNERSHIP
THE SOUTHEAST WISCONSIN REGIONAL ECONOMIC PARTNERSHIP

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Prepared by

The Southeastern Wisconsin Regional Planning Commission
The Milwaukee 7 Regional Economic Development Partnership
The Southeast Wisconsin Regional Economic Partnership

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COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY FOR SOUTHEASTERN WISCONSIN: 2015 - 2020

SUMMARY

INTRODUCTION

A Comprehensive Economic Development Strategy (CEDS) is designed to bring together the public and private sectors to develop a strategic plan to diversify and strengthen the region's economy. This document sets forth the CEDS for the Southeastern Wisconsin Region. It was developed jointly by the Milwaukee 7 (M7) Economic Development Partnership and the Southeastern Wisconsin Regional Planning Commission (SEWRPC), with assistance from the Regional Economic Partnership (REP)¹ and the Wisconsin Economic Development Corporation.

SOUTHEASTERN WISCONSIN REGION

The Southeastern Wisconsin Region consists of seven counties located in the southeastern corner of Wisconsin along Lake Michigan (Kenosha, Milwaukee, Ozaukee, Racine, Walworth, Washington, and Waukesha Counties). The seven counties have a total land area of 2,689 square miles, or about 5 percent of the total area of Wisconsin. These counties, however, have a resident population of over 2 million persons, or about 36 percent of the total population of the State. The seven-county region provides about 1.18 million jobs, or about 36 percent of all jobs in the State, and contains real property worth about \$182.6 billion, or about 37 percent of the wealth of the State as measured by equalized property value. Exclusive of school and other special-purpose districts, the region contained 155 units of general government (counties, cities, villages, and towns) as of June 2015, which are shown on Map I-1.

The Region includes four urbanized areas, and one urbanized area that extends into the Region from northern Illinois (see Map III-1 in Chapter III). Urbanized areas consists of a central core and adjacent urban and suburban areas that together contain at least 50,000 people, which are delineated by the Census Bureau based on resident population and population density. In addition to the principal cities of Kenosha, Milwaukee, Racine, and West Bend, the Cities of Brookfield, Cedarburg, Hartford, Mequon, Oconomowoc, Port Washington, Waukesha, and all of Milwaukee County except southern portions of Franklin and Oak Creek are included in the five urbanized areas. The urbanized areas include about 86 percent of the Region's population and about 27 percent of the Region's area. The Region also includes many smaller urban areas with a mix of higher-density residential, commercial, and industrial uses, typically within smaller cities and villages. Urban areas with a population between 2,500 and 50,000 residents outside urbanized areas include the Cities of Burlington, Delavan, Elkhorn, Lake Geneva, and Whitewater, and the Villages of East Troy, Mukwonago, Union Grove,

¹ *The Southeast Wisconsin Regional Economic Partnership includes a representative from each county, the City of Milwaukee, We Energies, M7, and SEWRPC.*

and Walworth. These areas, termed “urban clusters” by the Census Bureau, occupy about 3 percent of the Region. About 70 percent of the Region is characterized as rural, where agricultural uses predominate.

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

Why Prepare a CEDS?

The purpose of this CEDS report is three-fold. First, the CEDS is intended to provide a basis for a more widespread understanding of the ongoing economic development work program in the region and, to that end, draws heavily from the strategic planning work of the M7. Second, the CEDS is intended to meet the requirements of the U.S. Department of Commerce - Economic Development Administration (EDA) for such work, thereby buttressing efforts to secure Federal funding for projects in the seven-county Region that have a particular focus and impact on economic development. Third, the CEDS is intended to provide a basis whereby the EDA can consider creation of an Economic Development District in southeastern Wisconsin.

EDA focuses on strategic investments to foster job creation and attract private investment to support development in economically distressed areas of the United States, and in areas that require assistance to recover from emergencies and natural disasters. Funding under EDA’s Public Works and Economic Adjustment Assistance programs are contingent on the adoption of a CEDS by the region or county concerned.

Formation of an Economic Development District

This CEDS was adopted by each of the County Boards representing the seven counties in the Region and by the Southeastern Wisconsin Regional Planning Commission in 2015. Following these adoptions, SEWRPC will request designation of the Region as an Economic Development District (EDD). Designation as an EDD would make the Region eligible for support from EDA through its Partnership Planning program to help implement this CEDS, and to prepare updates as needed to refine economic development strategies and identify and prioritize actions to carry out the strategies. It is anticipated that the Southeastern Wisconsin Regional Planning Commission would serve as the governing body of the EDD, and that M7 will have the primary role, with assistance from the Regional Economic Partnership, in carrying out the recommendations of the CEDS.

KEY ECONOMIC CLUSTERS IN THE REGION

Six business clusters have been identified as having the best potential for economic growth, expansion, and attraction in Southeastern Wisconsin:

- **Energy, power, and controls**, focusing on products and services related to electrical power distribution and industrial and building automation and controls.
- **Water technologies**, involving water quality and quantity, wastewater treatment, environmental engineering, and the manufacturing and distribution of pumps, valves, and other water related equipment.
- **Food and beverage production and manufacturing**, involving ingredients, processing, and food production.
- **Finance and insurance services**, focusing on insurance and money management.
- **Headquarters and business services**, particularly relating to information technology; data processing systems and services; distribution and supply chain systems; and medical information.
- **Medical technology, bioscience, and health services**, focusing on diagnostic equipment and botanical and pharmaceutical research, product development, and manufacturing.

Machinery manufacturing has also been identified as a driver industry, which supports or is part of most of the six key clusters through the manufacture of sophisticated machinery used in the power, energy efficiency, water treatment and distribution, medical, and food products industries, among others.

Printing was identified as a legacy cluster, with a potential to capture an increasing share of the consolidating printing market based on the cluster's regional concentration and levels of local expertise, supportive industry institutions, and access to Wisconsin's paper industry.

NINE STRATEGIES FOR REGIONAL PROSPERITY

A set of nine mutually reinforcing strategies are proposed for moving the Southeastern Wisconsin Region forward on the path to new-economy growth. Each strategy is designed to increase the productivity of local firms by leveraging the region's unique strengths, taking advantage of its emerging opportunities, and addressing its most critical challenges.

Together these strategies build upon current assets and momentum to enable the Southeastern Wisconsin Region to realize its potential to become a leading place to do business in the next economy, and a thriving, prosperous, and dynamic region. These strategies provide a framework that aligns existing efforts, and offers guidance for identifying, developing, and prioritizing future economic growth initiatives.

1. Become a leading innovator, producer, and exporter of products and services related to **energy, power, and controls**.

The region is well positioned to grow its energy, power, and controls cluster given its array of global leaders in critical segments of the cluster, including Rockwell Automation (industrial and automation controls); SPX Transformer Solutions (formerly Waukesha Electric) and Eaton (formerly Cooper Power) (power infrastructure); and Johnson Controls (energy storage, building energy efficiency).

A collaborative network of companies and academic institutions has formed the Mid-West Energy Research Consortium (M-WERC), and one-on-one university-industry partnerships such as the University of Wisconsin-Milwaukee/Johnson Controls Partnership in Energy Research are similarly creating more capacity and innovation in the cluster.

2. Become a global hub for innovation and start-up activity in **water technology**.

The region's access to the Great Lakes – 21 percent of the world's surface fresh water – provides several economic advantages. The region has a competitive edge in attracting and growing water-related industries, which benefit from close proximity to this plentiful resource. The water technology industry includes a broad spectrum of products and services, with industry strengths in pumps, meters, boilers, and valves. The region is also home to world-class research institutions, making it a world hub of water technology, research, and policy.

The 100-plus corporate members of The Water Council continue to build on these competitive advantages to establish the region as a global hub for water-related research and development, company formation, and human capital development.

3. Leverage the region's geographic, supply chain, and human capital advantages to grow the **food and beverage** cluster.

The region exhibits supply-chain advantages in growing a competitive food and beverage cluster, given its proximity to the vast quantities of crop-based, dairy, and animal products generated throughout Wisconsin. These agricultural outputs continue to drive a regional strength in ingredient manufacturing, ranging from seasonings to enzymes. This cluster also has the advantage of a formal cluster organization, the Food and Beverage (FaB) Wisconsin network, composed of more than 50 firms working together to enhance cluster growth by focusing on the areas of talent, innovation, and business development.

4. Enhance the **export capacity and capability** of the region's firms, focusing on small- and medium-sized enterprises. Given that the majority of the world's purchasing power is outside the U.S., and a disproportionate share of global economic growth over the next decade will occur beyond U.S. borders, increasing export activity is imperative to the economic future of the Milwaukee region.

In late 2013, the region was one of eight U.S. metro areas selected for the Global Cities Initiative, a program established by the Brookings Institution and JPMorgan Chase to expand global trade and exporting. As part of this program, a regional export strategy and action plan will be developed and implemented. Components of this strategy include:

- Improving alignment of regional resources around exporting.
- Supporting small- and mid-sized firms in developing export strategies and plans.
- Leveraging large firms as catalysts to mentor smaller companies in exporting.
- Exploring opportunities for expanding service exports – establish a baseline model.
- Advocating for export policy as a critical success factor in regional development.

5. Align **workforce development** with growth opportunities in targeted, high-potential industry clusters.

Perhaps the most critical factor for increasing the productivity, and therefore overall growth prospects, of the region's clusters is to upgrade and better align the skills of the workforce with the occupations that are and will be demanded by employers. Increasing the number and type of "on-ramps" to labor force participation and articulating paths to upward mobility, particularly for the region's central city and minority populations, will also enhance economic growth by more effectively deploying the region's full spectrum of human capital assets.

6. Foster a dynamic, richly networked **innovation and entrepreneurship ecosystem**, building on existing nascent, but fragmented activities. The region has gained impressive momentum in creating an innovation and entrepreneurship ecosystem. There is significant activity among private, public, and institutional actors that must be deliberately leveraged to boost rates of new firm creation and build the competitive advantage of existing firms. The region's high-priority clusters present ample opportunities for innovation and entrepreneurship, including new processes and products to further accelerate already-strong clusters' growth trajectories, opportunities for legacy clusters to redeploy their resources into new products and markets, and creation of entirely new products and services in emerging clusters.
7. Catalyze "**economic place-making**" in the region's core cities and strategic locations throughout the region. The physical development pattern in the region reflects its old-economy history and needs to be reshaped to align with the drivers of growth in the more dynamic, knowledge-intensive next economy. The region must streamline the movement of goods, people, and ideas throughout the region; reconnect its underutilized human capital assets to economic opportunities; and better leverage its strategically located land assets to foster growth in the new economic environment.

The shift in regional development and redevelopment patterns has begun to take place through, for example, the 30th Street Corridor, Menomonee Valley, Pleasant Prairie, Pabst Farms, and the UW-Milwaukee Innovation Campus. Catalyzing additional development that follows the next-economy principles of density, mixed uses, and strong physical and virtual connections between residential and commercial activity will further accelerate the region's growth.

8. Modernize **regional infrastructure** to enhance efficiency, cost-effectiveness, and connectivity. High-quality infrastructure, including a mix of transportation, broadband, and reliable energy, contributes to the region's economic growth by enabling enhanced productivity of private-sector firms. The role of transportation infrastructure – facilitating the efficient movement of people and goods into, out of, and within the region – is particularly critical. Strategic investments to improve the existing transportation

network will better connect workers to employers, suppliers to customers, and headquarters to their facilities in other regions and nations.

9. Enhance **inter-jurisdictional cooperation and collaboration** for economic growth.

The next-economy environment requires collaboration among actors from across the public, private, and civic sectors to develop strategies and initiatives, manage implementation, and monitor performance of the regional economy. Continued emphasis should be placed on strengthening civic engagement and creating the extensive, nimble networks that can adapt as necessary to address economic challenges and capture opportunities. In addition, regional leaders are encouraged to proactively seek out opportunities to work with county economic development organizations and others to pursue collaborative economic growth projects that cross jurisdictional boundaries and benefit the broader seven-county region.

PERFORMANCE MEASURES

Economic growth in the region will be monitored by the M7, which produces an ongoing Performance Scorecard that tracks economic performance measures, including:

- Direct Jobs
- Direct Payroll
- New Capital Investment
- Total Jobs, Direct and Indirect
- Total Payroll, Direct and Indirect
- Total Projects
- Total Project Wins

LIST OF ACRONYMS

CMAQ – Congestion Mitigation and Air Quality Management¹
EDA – Economic Development Administration, an agency of the U.S. Department of Commerce
EDWC – Economic Development Washington County²
EPA – United States Environmental Protection Agency
FaB – Food and Beverage (Cluster)
HUD – U.S. Department of Housing and Urban Development
KABA – Kenosha Area Business Alliance²
M7 – Milwaukee 7 Regional Economic Development Partnership
MAWIB – Milwaukee Area Workforce Investment Board³
MCED – Milwaukee County Economic Development²
MMAC – Metropolitan Milwaukee Association of Commerce
MMSD – Milwaukee Metropolitan Sewerage District
MWERC – Midwest Energy Research Consortium
OED – Ozaukee Economic Development²
RCEDC – Racine County Economic Development Corporation²
REP – Southeast Wisconsin Regional Economic Partnership
RLF – Revolving Loan Fund
RWA – Regional Workforce Alliance
SEWRPC – Southeastern Wisconsin Regional Planning Commission
SEWWDB – Southeast Wisconsin Workforce Development Board³
STP – Surface Transportation Program¹
TBD – To Be Determined
TEA – Transportation Economic Assistance⁴
TIF – Tax Increment Financing
TIGER – Transportation Investment Generating Economic Recovery¹
USDOT – U.S. Department of Transportation
UWEX – University of Wisconsin Extension
WCEDA – Walworth County Economic Development Alliance²
WDOA – Wisconsin Department of Administration
WDFC – Wisconsin Department of Families and Children
WDNR – Wisconsin Department of Natural Resources
WDWD – Wisconsin Department of Workforce Development
WEDC – Wisconsin Economic Development Corporation

WHEDA – Wisconsin Housing and Economic Development Authority

WisDOT – Wisconsin Department of Transportation

WMEP – Wisconsin Manufacturing Extension Partnership

WOWWDB – Waukesha-Ozaukee-Washington Workforce Development Board³

Footnotes:

¹ U.S. Department of Transportation funding program.

² County Economic Development Organization.

³ Workforce Development Boards serving counties in the Region include MAWIB, serving Milwaukee County; SEWWDB, serving Kenosha, Racine, and Walworth Counties; and WOWWDB, serving Ozaukee, Washington, and Waukesha Counties.

⁴ Wisconsin Department of Transportation funding program.

**COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY
FOR SOUTHEASTERN WISCONSIN: 2015 - 2020**

Chapter I

INTRODUCTION

THE SOUTHEASTERN WISCONSIN REGION

The Southeastern Wisconsin Region consists of Kenosha, Milwaukee, Ozaukee, Racine, Walworth, Washington, and Waukesha Counties (see Map I-1). Exclusive of Lake Michigan, these seven counties have a total area of 2,689 square miles, or about 5 percent of the total area of Wisconsin. These counties, however, have a resident population of over 2 million persons, or about 36 percent of the total population of the State. The seven-county region provides about 1.18 million jobs, or about 36 percent of all jobs in the State, and contains real property worth about \$182.6 billion, or about 37 percent of the wealth of the State as measured by equalized property value. Exclusive of school and other special-purpose districts, the Region contains 155 units of general government (counties, cities, villages, and towns) as of June 2015.

Geographically, the Region is located in a relatively good position with regard to continued growth and development. It is bounded on the east by Lake Michigan, which is an integral part of a major international transportation network. It is bounded on the south by the rapidly expanding Chicago-based metropolitan region of northeastern Illinois, and on the west and north by the fertile agricultural lands and desirable recreation areas of the rest of the State of Wisconsin. Many of the most important industrial areas and heaviest population concentrations in the Midwest lie within 250 miles of the Region (see Map I-2), and over 29.7 million people reside within this radius.

Urbanized areas are delineated by the U.S. Bureau of the Census based on resident population and population density. They consist of a central core and adjacent densely settled area that together contain at least 50,000 people. There are four urbanized areas located entirely within the Region: the Kenosha, Milwaukee, Racine, and West Bend urbanized areas. A portion of a fifth urbanized area—the Round Lake Beach urbanized area—lies in western Kenosha County and eastern Walworth County, with the greater portion located in northeastern Illinois. The boundaries of the urbanized areas of the region are shown on Map III-1 included in Chapter III of this report.

ECONOMIC DEVELOPMENT STRATEGY COLLABORATION

The comprehensive development strategy for the seven-county region set forth in this document was prepared collaboratively by three organizations: the Southeastern Wisconsin Regional Planning Commission (SEWRPC), the Milwaukee 7 Regional Economic Development Partnership (M7), and the Southeast Wisconsin Regional Economic Partnership (REP).

The Southeastern Wisconsin Regional Planning Commission

The Southeastern Wisconsin Regional Planning Commission was established in 1960 under Section 66.0309 of the *Wisconsin Statutes* as the official areawide planning agency for the highly urbanized southeastern region of the State. The Commission was created to provide the basic information and planning services necessary to solve problems which transcend the corporate boundaries and fiscal capabilities of the local units of government comprising the Southeastern Wisconsin Region.

Its structure prescribed by State law, the Commission consists of 21 members, three from each of the seven member counties. One Commissioner from each county is appointed by its county board of supervisors, or, in those counties where a county executive appoints, confirmed by the county board and is usually an elected county board supervisor. The remaining two from each county are appointed by the Governor, one from a list submitted by the county.

The Commission prepares an annual work program that is carried out by a core staff of full-time professional, technical, administrative, and clerical personnel, supplemented by additional temporary staff and consultants as required by the various work programs under way. Basic financial support for the Commission's work program is provided by federal and state funding and county tax levies apportioned on the basis of equalized valuation.

The Commission is charged by law with the function and duty of making and adopting a master plan for the physical development of the Region. The permissible scope and content of this plan, as outlined in the enabling legislation, extend to all phases of regional development, implicitly emphasizing, however, the preparation of alternative spatial designs for the use of land and for supporting transportation and utility facilities. By the end of 2013, the adopted regional plan consisted of 32 individual plan elements. The Commission is the Federally-recognized Metropolitan Planning Organization (MPO) for transportation planning.

The SEWRPC role in the collaborative effort to prepare a Federally-compliant comprehensive economic development strategy was to provide basic information supportive of the strategy development process, and to help ensure that the resultant strategy was consistent with and reflected the comprehensive planning objectives and plan recommendations set forth in the set of regional plans for the development of the seven-county region.

Milwaukee 7 Regional Economic Development Partnership

The Milwaukee 7 Regional Economic Development Partnership—or M7—was created in 2005 to provide a regional economic development platform for the seven southeastern Wisconsin counties of Kenosha, Milwaukee, Ozaukee, Racine, Walworth, Washington, and Waukesha. The founding partners in this effort were the Greater Milwaukee Committee, the Milwaukee Metropolitan Association of Commerce, and the City of Milwaukee. The M7 operating entity for this partnership is the Milwaukee Development Corporation, a private non-profit organization sponsored by the Milwaukee business community. Funded by investors from both the public and private sectors in the seven-county Region, including Milwaukee County, the M7 has an annual operating budget of about \$1.5 million. The M7 work is accomplished by a dedicated full-time staff housed in downtown Milwaukee at the Milwaukee Metropolitan Association of Commerce offices. M7 has a website, www.MKE7.com, which provides a wealth of information about the M7 Region, and includes an interactive mapping application that allows users to quickly and easily search available properties. The M7 also operates three linked resource centers—in Milwaukee, Racine, and Kenosha—that are powered by interactive tools used to recruit and assist businesses with relocation and expansion activities.

The work of the M7 team is overseen by a 63-member Advisory Council co-chaired by representatives of the three founding M7 organizations. This Council includes representatives from many sectors of the regional economic base, including large and small manufacturing corporations, the university community, the healthcare community, and the labor community. Elected officials from all seven counties in the Southeastern Wisconsin Region are also represented on the Council, as well as the economic development director for each of the seven counties.

In its formative years, the M7 organization undertook an extensive strategic planning process to develop a focused long-term strategy aimed at making the region globally competitive in an innovation economy. This process included an identification of key regional assets, e.g., experienced and educated talent, innovation capacity, freshwater location, and infrastructure; an analysis that focused on the identification of driver industries, i.e., those industries that export goods and services beyond the regional borders and bring new income to the region; an assessment to identify opportunities for building long-term prosperity by aligning regional assets with export driver industries; and outside research using best practices methodology that studied industry groups and location factors, all in an effort to evaluate business operations types that align well with the Region's strengths.

The initial strategic planning process concluded with the preparation of a business plan designed to target six economic sectors that are believed to offer the best potential for growth, expansion, and attraction. These six sectors are:

- **Energy, power, and controls**, focusing on products and services related to electrical power distribution and industrial and building automation and controls.
- **Water technologies**, involving water quality and quantity, wastewater treatment, environmental engineering, and the manufacturing and distribution of pumps, valves, and other water related equipment.
- **Food and beverage production and manufacturing**, involving ingredients, processing, and food production.
- **Finance and insurance services**, focusing on insurance and money management.
- **Headquarters and business services**, particularly relating to information technology; data processing systems and services; distribution and supply chain systems; and medical information.
- **Medical technology, bioscience, and health services**, focusing on diagnostic equipment and botanical and pharmaceutical research, product development, and manufacturing.

Machinery manufacturing has also been identified as a driver industry, which supports or is part of most of the six key clusters through the manufacture of sophisticated machinery used in the power, energy efficiency, water treatment and distribution, medical, and food products industries, among others.

Printing was identified as a legacy cluster, with a potential to capture an increasing share of the consolidating printing market based on the cluster's regional concentration and levels of local expertise, supportive industry institutions, and access to Wisconsin's paper industry.

Based on this business plan, the M7 business development team continuously engages in corporate growth, expansion, and attraction activities, with the M7 organization having achieved a position of being able to respond to leads with a single point of contact for the Region, proactively pursuing opportunities both nationally and abroad. This work involves an extensive CEO call effort, generating and pursuing leads, outreach to site selectors and corporate relocation executives, and participation in industry trade shows.

In addition, the M7 organization strives to find ways in which to improve the regional business climate by sponsoring/supporting collaborations and alliances that complement the strategically defined targets of the M7 business team. These include the following:

- The **Mid-West Energy Research Consortium (M-WERC)**, a consortium of industry leaders, universities, technical colleges, and other organizations with a vision to make Wisconsin and the Midwest the leader in energy, power, and controls.
- **Food and Beverage (FaB) Wisconsin**, an alliance of the region and state's food industry leaders coming together to find ways to increase job growth and capital investment, to develop career pathways, and to create and improve places to expand, locate, or start a food business.

- **The Water Council**, a collaborative effort of industries and the academic research community in the region to establish the region as a global capital for freshwater research, economic development, and education.
- **BizStarts**, a non-profit organization dedicated to fostering and promoting entrepreneurship in the region.
- **Fuel Milwaukee**, a collaboration to promote and establish the region as a place of choice for world class talent.
- **Regional Workforce Alliance**, a collaboration of the workforce development agencies and technical colleges serving southeastern Wisconsin.

The M7 organization also identifies ways in which public policy determinations can improve the region's competitive standing. This includes such incentives as jobs tax credits and enterprise zone programs, as well as support for public transit services to better connect workers to jobs. For the current effort to prepare a federally-compliant Comprehensive Economic Development Strategy (CEDS), the M7 team has documented and updated its strategic approach to economic development activities in the Region in the manner presented later in this report.

Southeast Wisconsin Regional Economic Partnership

The Southeast Wisconsin Regional Economic Partnership (REP) consists of the primary economic development professional practitioners in the Region. The group includes representatives from all seven counties, the City of Milwaukee, We Energies, M7, and SEWRPC. This group of practitioners operates on an informal basis, and predated the creation of the M7 organization in 2005. The REP role in the collaborative effort to prepare a federally-compliant comprehensive economic development strategy consisted of reviewing and commenting on the substantive material included in this CEDS document, and assisting in the identification of the ongoing and potential economic development projects listed in Chapter VIII.

PURPOSE OF THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

The purpose of this comprehensive economic development strategy (CEDS) report is three-fold. First, the document is intended to provide a basis for a more widespread understanding of the ongoing economic development work program in the Region and, to that end, draws heavily upon work of the M7 organization. Second, the document is intended to meet the requirements of the U.S. Economic Development Administration (EDA) for such work, thereby buttressing efforts to secure Federal funding for projects in the seven county Region that have a particular focus and impact on economic development activities. Third, the document is intended to provide a basis whereby the EDA can consider creation of an Economic Development District in southeastern Wisconsin.

EDA Mission and Policies

The mission of the EDA is to lead the federal economic development agenda by promoting innovation and competitiveness, preparing regions for growth and success in the global economy. EDA's investment policy is designed to establish a foundation for sustainable job growth and the building of durable regional economies throughout the United States. This foundation builds upon two key economic drivers - innovation and regional collaboration. EDA maintains that innovation is key to global competitiveness, new and better jobs, a resilient economy, and the attainment of national economic goals, and also that regional collaboration is essential for economic recovery. Regions are the centers of competition in the new global economy and those that work together to leverage resources and use their strengths to overcome weaknesses will fare better than those that do not.

EDA focuses on strategic investments to foster job creation and attract private investment to support development in economically distressed areas of the United States, and in areas that require assistance to recover from emergencies and natural disasters. Funding under EDA's Public Works and Economic Adjustment Assistance programs are contingent on the adoption of a CEDS. Completion of a CEDS is also a requirement for EDA designation of the Region as an Economic Development District (EDD).

CEDS ADOPTION AND FORMATION OF SOUTHEASTERN WISCONSIN ECONOMIC DEVELOPMENT DISTRICT

The CEDS for Southeastern Wisconsin was adopted by each of the seven county boards in the Region and by the Southeastern Wisconsin Regional Planning Commission in 2015. All of the adopting resolutions included support for designation of the Region as an EDD. Based on those adoptions, SEWRPC will request that EDA designate the Region as an Economic Development District. Designation as an EDD would make the Region eligible for support from EDA through its Partnership Planning program to help implement this CEDS, and to prepare updates as needed to refine economic development strategies and identify and prioritize actions to carry out the strategies.

It is anticipated that the Southeastern Wisconsin Regional Planning Commission would serve as the governing body of the EDD, and that M7 will have the primary role, with assistance from the Regional Economic Partnership, in carrying out the recommendations of the CEDS. The Regional Economic Partnership will assist in developing annual CEDS implementation reports and five-year updates by reviewing and commenting on draft reports prepared by M7 and SEWRPC staffs, and by providing county-specific information to assist in the development of the reports.

CEDS STRATEGY COMMITTEE

The CEDS is based upon and draws heavily from the regional *Framework for Economic Growth* strategic plan prepared by the M7 in 2012 and 2013. Preparation of the *Framework for Economic Growth* plan was a collaborative process among business interests, educational institutions, and government representatives serving on a number of M7 advisory committees. The plan was prepared under the guidance of the M7 Advisory Council, which is broadly representative of an array of regional interests. The membership of the M7 Advisory Council is set forth in Appendix A.

The Regional Economic Partnership (REP) played an important role in overseeing the development process of the CEDS report, including supplementing the information in the *Framework for Economic Growth* plan to include additional county-specific information, information about economically-distressed areas in the Region, and existing and proposed economic development projects. The membership of the REP is also included in Appendix A.

PUBLIC PARTICIPATION

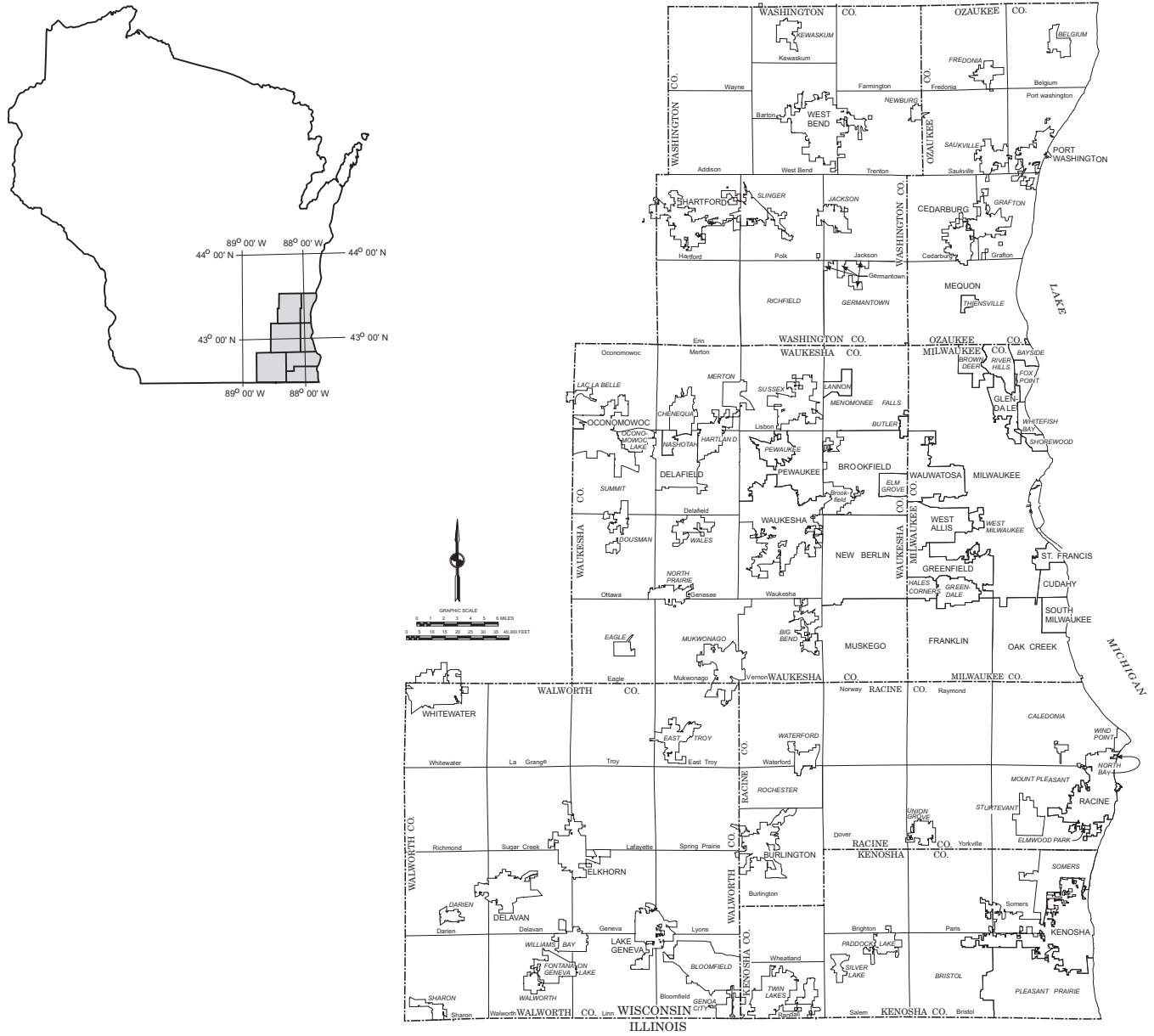
A draft version of the CEDS report was made available on the SEWRPC website, and notice of its availability there and in paper copy was made by a display ad placed in selected regional newspapers and through email notifications. A 60-day public comment period was made available to all members of the public. A summary of public comments and changes to the CEDS to address the comments is provided in Appendix B. The full record of comments is available from SEWRPC.

REPORT FORMAT

Following this introductory chapter, basic information is provided relative to population and household trends and projections (Chapter II); regional geography, resources, and land uses (Chapter III); regional infrastructure (Chapter IV); and the regional economy (Chapter V). Those chapters are followed by Chapter VI, which sets forth a framework for economic growth, followed by a plan of action in Chapter VII. Chapter VIII sets forth ongoing and proposed economic development projects in the Region, some of which could be aided by Federal funds from EDA.

Map I-1

THE SOUTHEASTERN WISCONSIN REGION: 2015



Source: SEWRPC.

Map I-2

THE REGIONAL SETTING IN THE MIDWEST



Source: SEWRPC.

**COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY
FOR SOUTHEASTERN WISCONSIN: 2015 - 2020**

Chapter II

**POPULATION AND HOUSEHOLD TRENDS AND
PROJECTIONS**

INTRODUCTION

Current and historic information on the Region’s population and households is essential to the preparation of an economic development strategy for the Region. Such information contributes to an understanding of existing development patterns and historic trends in the development of the Region. This chapter presents information on existing population and household levels in the Region and information on the characteristics of the Region’s population and households, along with related historic trend information. In addition, this chapter presents information on the projections of population and households in the Region to 2035, the present plan design year used in preparing the comprehensive regional development plan for southeastern Wisconsin.

POPULATION TRENDS, CHARACTERISTICS, AND PROJECTIONS

Population Size

The resident population of the Region approximated 2.02 million persons in 2010, an increase of 15 percent over the resident population in the Region in 1970 of about 1.76 million persons. As shown in Table II-1, this rate of growth in regional population is substantially below that of the population of Wisconsin and the Nation. Since 2000, current population levels indicate that the Region grew at about three-quarters the rate of Wisconsin and slightly less than one-half of the rate of the Nation. The historic population growth rates for the Region, Wisconsin, and the Nation are shown in Figure II-1.

Population Distribution by County

The relative distribution of the population among the seven counties within the Region continues to change. As shown in Figure II-2, Milwaukee County’s share of the regional population, which stood at about 60 percent in 1970, is estimated at slightly less than 47 percent in 2010. The relative shares of the regional population held by each of the remaining six counties have all increased over the 40 year period since 1970, with Waukesha County approaching 20 percent of the regional population. During that period Milwaukee County’s population declined by about 10 percent, with Washington County’s population more than doubling. The rate of population change in the Region over the 40 year period is summarized by civil division on Map II-1, there being 146 cities, villages, and towns in the Region. The 2010 population density of the Region by civil division is identified on Map II-2.

Age Composition

The age composition of the Region and Wisconsin over the period 1970 to 2010 is identified in Table II-2. There has been a significant change in the Region’s population by age group over this period in both Wisconsin and the

Region, with the prime workforce age group—20 to 64 years—increasing in both Wisconsin and the Region by about 10 percentage points, to about 60 percent of the population. This change has been accompanied by corresponding reductions in the two younger age groups, as well as an increase in the 65 years and over age group. These trends are reinforced by the data shown in Table II-3 pertaining to median age.

Racial Composition

The racial composition of the population of Wisconsin, the Region, and the seven counties comprising the Region is identified in Table II-4 for the period 1970 through 2010. Changing more rapidly than the State over that time period, the white population of the Region declined from nearly 93 percent in 1970 to 76 percent in 2010. Among the seven counties of the Region, the largest concentrations of non-white populations are found in Milwaukee (39 percent), Racine (20 percent), and Kenosha (16 percent) Counties.

Hispanic Origin

The Hispanic population of Wisconsin, the Region, and the seven counties comprising the Region is shown in Table II-5 for the period 1980 to 2010. Over that 30-year period, the Hispanic population has increased significantly in both Wisconsin and the Region, with Hispanics now constituting 10 percent of the regional population. Among the seven counties, the Hispanic population is primarily concentrated in Milwaukee, Racine, Kenosha, and Walworth Counties.

Educational Attainment

The educational attainment level of the population of Wisconsin, the Region, and the seven counties comprising the Region as of 2010 is shown in Table II-6. In terms of educational attainment, the population of the seven county Region closely mirrors the population of Wisconsin. There are, however, some significant differences in educational attainment levels among the populations of the seven counties of the Region. For example, approximately one-half of the populations of Ozaukee and Waukesha Counties have achieved bachelor or greater degrees compared with about one-third of the population residing in the remaining counties of the Region. Correspondingly, the proportion of the population twenty-five years and over without a high school diploma approximates 11 percent in Kenosha County, 15 percent in Milwaukee County, 12 percent in Racine County, and 11 percent in Walworth County.

Population Projections

Population projections for the Nation, Wisconsin, the Region, and the seven counties comprising the Region are set forth in Table II-7. These projections are for the 35-year period 2000 through 2035. Consistent with recent past trends, both the Nation and Wisconsin are expected to grow faster than the Region. Over the 35-year period, the Region is expected to grow by nearly 345,000 persons, an increase of 18 percent, to a total of about 2.28 million persons. The population growth rates for the Nation, Wisconsin, and the Region by five year periods are depicted in Figure II-3. Consistent with projections for the Nation and Wisconsin, population growth is expected to slow down later in the projection period.¹

The projected changes in population among the Region's seven counties over the 35-year period range, in absolute terms, from a low of nearly 19,000 persons in Ozaukee County to a high of about 86,000 persons in Waukesha County. In relative terms, the population changes among the counties range from an increase of about 7 percent in Milwaukee County to an increase of about 52 percent in Walworth County.

The anticipated change in population by age group over the 35-year period is shown for Wisconsin and the Region in Table II-8. In both cases, the population is expected to significantly age, the fastest growing age group being those 65 years and over. More detailed data relative to the projected population of the Region by age group and gender is shown in Figure II-4.

¹A comparison of the 2010 population levels as set forth in the U.S. Census that year with the 2010 stage of the 2000-2035 projections for the Region and its counties indicates a variance of less than one percent for the Region and variances of up to three percent for the counties.

HOUSEHOLD TRENDS, CHARACTERISTICS, AND PROJECTIONS

Number of Households

The number of households in Wisconsin, the Region, and the seven counties comprising the Region over the period 1970 to 2010 is shown in Table II-9. In 2010 there were over 800,000 households in the Region, representing about 35 percent of the total number of households in Wisconsin. Over the 40-year period, regional households increased by about 49 percent as compared to a regional population increase over that period of only about 15 percent. As noted below, these differential growth rates are reflected in a declining average household size in the Region. At the county level, the number of households in 2010 ranged from about 34,200 in Ozaukee County to 383,600 in Milwaukee County.

Household Size

The historic change in household size in Wisconsin, the Region, and the seven counties comprising the Region is also shown in Table II-9. In both Wisconsin and the Region, average household size has declined significantly since 1970, from about 3.2 persons per household to about 2.4 persons per household. The rate of decline in household size has slowed in recent years following a relatively precipitous decline during the 1970's.

Housing Unit Value

The median owner-occupied housing unit value for Wisconsin, the Region, and the seven counties comprising the Region over the period 1970 to 2010 is set forth in Table II-10 in reported dollars and constant 2010 dollars. In 1970, the median housing unit value in the Region was \$20,500. By 2010, that value had risen to \$194,100, reflecting an average annual increase of 5.8 percent. Had that 1970 value increased only by general price inflation over that 40-year period, the median housing unit value in 2010 would have been \$114,600, since that rate of increase averaged 1.3 percent annually. Possible factors for this difference include trends toward larger houses on larger lots with more costly finishes, housing production costs that rose greater than general price inflation, and a more demanding regulatory environment, including the introduction of substantial impact fees.

Housing Affordability

The relationship between housing costs and household income is an indicator of housing affordability. The latter is gauged by the proportion of household income expended for rent or home ownership costs. Rental costs include contract rent plus the estimated monthly cost of utilities and fuel. Ownership costs include payments for mortgages, real estate taxes, fire hazard and flood insurance on the property, and utilities and fuel. The U.S. Department of Housing and Urban Development has promulgated a general standard that rent or home ownership costs should comprise no more than 30 percent of gross household income. While this standard would not apply to all households, the application of the standard provides a useful measure in gauging the affordability of housing in a metropolitan region such as southeastern Wisconsin.

The proportions of households paying more than 30 percent of household income for housing in Wisconsin, the Region, and the seven counties comprising the Region for the years 1989, 1999, and 2010 are identified in Table II-11. Similar patterns of change with respect to this measure are found in Wisconsin and the Region, with both home owners and renters finding it far more difficult over that 20 year period to secure housing and not spend more than 30 percent of their household income to obtain that housing. Regionally, the number of home owners exceeding the 30 percent standard has nearly doubled from about 16 percent of households in 1989 to over 31 percent in 2010. Over that same time period, the number of renters exceeding the 30 percent standard increased from nearly 39 percent in 1989 to 50 percent in 2010. Similar patterns are found throughout all seven counties of the Region.

Household Projections

Household projections for Wisconsin, the Region, and the seven counties comprising the Region are set forth in Table II-12. These projections are for the 35-year period 2000 through 2035. Consistent with the population projections set forth earlier in this chapter, Wisconsin is expected to add households at a faster rate than the

Region. Over the 35-year period, the Region is expected to add nearly 177,000 households, an increase of 24 percent, to a total of nearly 926,000 households. Given an anticipated increase in population in the Region of about 18 percent, the average household size is expected to continue to decline over that period from about 2.5 persons in 2000 to slightly under 2.4 persons in 2035.

Table II-1

HISTORIC POPULATION GROWTH IN THE NATION, WISCONSIN, AND THE REGION: 1970 – 2010

Area	Population					Percent Change	
	1970	1980	1990	2000	2010	1970-2010	2000-2010
Nation	203,302,031	226,504,825	249,632,692	281,421,906	308,745,538	51.9	9.7
Wisconsin	4,417,821	4,705,642	4,891,769	5,363,715	5,686,986	28.7	6.0
Region	1,756,083	1,764,796	1,810,364	1,931,165	2,019,970	15.0	4.6
Counties							
Kenosha	117,917	123,137	128,181	149,577	166,426	41.1	11.3
Milwaukee	1,054,249	964,988	959,275	940,164	947,735	-10.1	0.8
Ozaukee	54,461	66,981	72,831	82,317	86,395	58.6	5.0
Racine	170,838	173,132	175,034	188,831	195,408	14.4	3.5
Walworth	63,444	71,507	75,000	92,013	102,228	61.1	11.1
Washington	63,839	84,848	95,328	117,496	131,887	106.6	12.2
Waukesha	231,335	280,203	304,715	360,767	389,891	68.5	8.1

Source: U.S. Bureau of the Census and SEWRPC.

Table II-2

PROJECTED POPULATION BY AGE IN WISCONSIN AND THE REGION: 1970-2010

Age Group	Percent of Total Population in Age Group				
	1970	1980	1990	2000	2010
Wisconsin					
Under 5 Years.....	8.6	7.4	7.4	6.4	6.3
5 to 19 Years	31.1	25.6	22.0	22.2	20.1
20 to 64 Years	49.6	55.1	57.3	58.3	59.9
65 Years and Over	10.7	12.0	13.3	13.1	13.7
Total	100.0	100.1	100.0	100.0	100.0
Region					
Under 5 Years.....	8.7	7.2	7.6	6.8	6.6
5 to 19 Years	30.4	25.1	21.6	22.4	20.9
20 to 64 Years	51.3	56.6	58.3	58.3	59.9
65 Years and Over	9.6	11.1	12.5	12.5	12.6
Total	100.0	100.0	100.0	100.0	100.0

Source: U.S. Bureau of the Census and SEWRPC.

Table II-3

MEDIAN AGE OF THE POPULATION IN WISCONSIN AND THE REGION: 1970-2010

Area	Median Years of Age				
	1970	1980	1990	2000	2010
Wisconsin	27.2	29.4	32.9	36.0	38.5
Region	27.6	29.7	32.8	35.4	37.0
Counties:					
Kenosha.....	26.9	29.4	32.5	34.8	36.3
Milwaukee.....	28.6	30.0	32.3	33.7	33.6
Ozaukee	25.6	30.2	34.6	38.9	42.9
Racine.....	26.0	29.0	32.9	36.1	39.0
Walworth.....	26.4	29.5	33.1	35.1	38.1
Washington.....	24.9	28.0	32.5	36.6	40.9
Waukesha.....	25.4	29.7	34.0	38.1	42.0

Source: U.S. Bureau of the Census and SEWRPC.

Table II-4

POPULATION BY RACE IN WISCONSIN AND THE REGION: 1970-2010

Area	Year	Percent of Total Population by Race						
		White	Black or African American	American Indian and Alaska Native	Asian or Pacific Islander	Other Race ^a	Two or More Races ^b	Total
Wisconsin	1970	96.4	2.9	--	--	0.7	--	100.0
	1980	94.4	3.9	0.6	0.4	0.7	--	100.0
	1990	92.2	5.0	0.8	1.1	0.9	--	100.0
	2000	88.9	5.7	0.9	1.7	1.6	1.2	100.0
	2010	86.2	6.3	1.0	2.3	2.4	1.8	100.0
Region	1970	92.6	6.8	--	--	0.6	--	100.0
	1980	88.3	9.5	0.4	0.5	1.3	--	100.0
	1990	84.4	12.1	0.5	1.2	1.8	--	100.0
	2000	79.4	13.6	0.5	1.8	3.0	1.7	100.0
	2010	76.0	14.6	0.5	2.6	3.9	2.3	100.0
Kenosha	1970	98.1	1.6	--	--	0.3	--	100.0
	1980	95.7	2.4	0.3	0.3	1.3	--	100.0
	1990	93.0	4.1	0.4	0.5	2.0	--	100.0
	2000	88.3	5.1	0.4	1.0	3.3	1.9	100.0
	2010	83.8	6.6	0.5	1.5	4.7	2.9	100.0
Milwaukee	1970	89.2	10.0	--	--	0.8	--	100.0
	1980	81.7	15.5	0.6	0.6	1.6	--	100.0
	1990	74.9	20.4	0.7	1.6	2.4	--	100.0
	2000	65.6	24.6	0.7	2.6	4.3	2.2	100.0
	2010	60.6	26.8	0.7	3.5	5.4	3.0	100.0
Ozaukee	1970	99.6	0.2	--	--	0.2	--	100.0
	1980	98.6	0.7	0.1	0.4	0.2	--	100.0
	1990	98.4	0.7	0.2	0.6	0.1	--	100.0
	2000	96.8	0.9	0.2	1.1	0.3	0.7	100.0
	2010	94.9	1.4	0.2	1.8	0.6	1.1	100.0
Racine	1970	93.4	6.2	--	--	0.4	--	100.0
	1980	89.7	8.0	0.2	0.3	1.8	--	100.0
	1990	86.9	9.7	0.3	0.6	2.5	--	100.0
	2000	83.0	10.4	0.4	0.8	3.7	1.7	100.0
	2010	79.7	11.1	0.4	1.1	5.1	2.5	100.0
Walworth	1970	99.1	0.5	--	--	0.4	--	100.0
	1980	97.7	0.6	0.2	0.4	1.1	--	100.0
	1990	97.0	0.6	0.3	0.6	1.5	--	100.0
	2000	94.6	0.8	0.2	0.7	2.6	1.1	100.0
	2010	91.9	1.0	0.3	0.9	4.5	1.5	100.0
Washington	1970	99.7	0.1	--	--	0.2	--	100.0
	1980	99.3	0.1	0.2	0.2	0.2	--	100.0
	1990	99.1	0.1	0.2	0.4	0.2	--	100.0
	2000	97.7	0.4	0.3	0.6	0.4	0.6	100.0
	2010	95.8	0.9	0.3	1.1	0.8	1.2	100.0
Waukesha	1970	99.5	0.2	--	--	0.3	--	100.0
	1980	98.5	0.3	0.2	0.5	0.5	--	100.0
	1990	97.9	0.4	0.2	0.9	0.6	--	100.0
	2000	95.8	0.7	0.2	1.5	0.9	0.9	100.0
	2010	93.3	1.3	0.3	2.8	1.0	1.3	100.0

^a1970 race categories include White, African American, and other races.

^bTwo or more races was not an option before the 2000 Census.

Source: U.S. Bureau of the Census and SEWRPC.

Table II-5

**HISPANIC POPULATION IN
WISCONSIN AND THE REGION: 1980-2010**

Area	Percent of Total Population Comprised of Persons of Hispanic Origin			
	1980	1990	2000	2010
Wisconsin	1.3	1.9	3.6	5.9
Region	2.6	3.8	6.5	9.9
Counties:				
Kenosha.....	2.9	4.4	7.2	11.8
Milwaukee.....	3.0	4.7	8.8	13.3
Ozaukee	0.8	0.7	1.3	2.3
Racine.....	4.2	5.2	7.9	11.5
Walworth.....	1.9	2.7	6.5	10.3
Washington.....	0.6	0.7	1.3	2.6
Waukesha.....	1.4	1.8	2.6	4.1

Source: U.S. Bureau of the Census and SEWRPC.

Table II-6

EDUCATIONAL ATTAINMENT FOR THE POPULATION 25 YEARS AND OVER IN WISCONSIN AND THE REGION: 2010

Educational Attainment	Wisconsin		Region		Kenosha		Milwaukee		Ozaukee	
	Number	Percent of Total	Number	Percent of Total	Number	Percent of Total	Number	Percent of Total	Number	Percent of Total
Less than 9th grade.....	131,242	3.5	47,393	3.6	4,717	4.4	30,272	5.0	517	0.9
9th to 12th grade, no diploma.....	244,183	6.4	95,512	7.2	7,594	7.1	57,645	9.5	1,548	2.6
High school graduate	1,265,296	33.3	396,890	29.9	39,039	36.3	178,416	29.5	12,170	20.5
Some college, no degree	803,727	21.1	287,931	21.7	23,395	21.7	130,444	21.6	12,470	21.0
Associate's degree, Bachelor's degree or greater.....	1,355,847	35.7	499,694	37.6	32,947	30.6	207,539	34.3	32,806	55.1
Total Population 25 and Over	3,800,295	100.0	1,327,420	100.0	107,692	100.0	604,316	100.0	59,511	100.0

Educational Attainment	Racine		Walworth		Washington		Waukesha	
	Number	Percent of Total	Number	Percent of Total	Number	Percent of Total	Number	Percent of Total
Less than 9th grade.....	3,547	2.7	2,340	3.5	2,509	2.8	3,491	1.3
9th to 12th grade, no diploma.....	12,254	9.4	4,401	6.7	4,510	5.0	7,560	2.8
High school graduate	45,337	34.6	23,951	36.2	30,239	33.5	67,738	25.2
Some college, no degree	29,273	22.4	14,368	21.7	21,864	24.2	56,117	20.9
Associate's degree, Bachelor's degree or greater.....	40,488	30.9	21,033	31.8	31,214	34.6	133,667	49.8
Total Population 25 and Over	130,899	100.0	66,093	100.0	90,336	100.0	268,573	100.0

Source: U.S. Bureau of the Census American Community Survey and SEWRPC.

Table II-7

POPULATION PROJECTIONS FOR THE NATION, WISCONSIN, AND THE REGION: 2000-2035

Area	Actual Population 2000 (Census)	Projected Population 2035	Projected Change in Population: 2000-2035	
			Number	Percent
Nation	281,421,906	389,531,000	108,109,094	38.4
Wisconsin	5,363,715	6,653,970	1,290,255	24.1
Region	1,931,165	2,275,980	344,815	17.9
Counties				
Kenosha.....	149,577	210,078	60,501	40.4
Milwaukee.....	940,164	1,007,122	66,958	7.1
Ozaukee	82,317	101,121	18,804	22.8
Racine.....	188,831	213,587	24,756	13.1
Walworth.....	92,013	140,039	48,026	52.2
Washington.....	117,496	157,265	39,769	33.8
Waukesha.....	360,767	446,768	86,001	23.8

NOTES: 2035 projections for counties and Region are from SEWRPC.
 2035 projection for Wisconsin is from the Wisconsin Department of Administration.
 2035 projection for the Nation is from the U.S. Census Bureau.

Source: U.S. Bureau of the Census, Wisconsin Department of Administration, and SEWRPC.

Table II-8

PROJECTED POPULATION BY AGE FOR WISCONSIN AND THE REGION: 2035

Age Group	Percent of Total Population in Age Group	
	Actual 2000	Projected 2035
Wisconsin		
Under 5 Years	6.4	5.8
5 to 19 Years.....	22.2	18.5
20 to 64 Years.....	58.3	53.4
65 Years and Over	13.1	22.3
Total	100.0	100.0
Region		
Under 5 Years	6.8	6.6
5 to 19 Years.....	22.4	20.2
20 to 64 Years.....	58.3	53.5
65 Years and Over	12.5	19.7
Total	100.0	100.0

Source: Wisconsin Department of Administration and SEWRPC.

Table II-9

HISTORIC POPULATION GROWTH IN WISCONSIN AND THE REGION: 1970 - 2010

Area	1970		1980		1990	
	Number of Households	Persons per Household	Number of Households	Persons per Household	Number of Households	Persons per Household
Wisconsin	1,328,804	3.22	1,652,261	2.77	1,822,118	2.61
Region	536,486	3.20	627,955	2.75	676,107	2.62
Counties						
Kenosha.....	35,468	3.26	43,064	2.80	47,029	2.67
Milwaukee.....	338,605	3.04	363,653	2.59	373,048	2.50
Ozaukee.....	14,753	3.66	21,763	3.04	25,707	2.79
Racine.....	49,796	3.35	59,418	2.86	63,736	2.70
Walworth.....	18,544	3.16	24,789	2.74	27,620	2.60
Washington.....	17,385	3.63	26,716	3.14	32,977	2.86
Waukesha.....	61,935	3.66	88,552	3.11	105,990	2.83

Area	2000		2010		Percent Change in Households	
	Number of Households	Persons per Household	Number of Households	Persons per Household	1970-2010	200-2010
Wisconsin	2,084,544	2.50	2,279,768	2.43	71.6	9.4
Region	749,039	2.52	800,087	2.47	49.1	6.8
Counties						
Kenosha.....	56,057	2.60	62,650	2.58	76.6	11.8
Milwaukee.....	377,729	2.43	383,591	2.41	13.3	1.6
Ozaukee.....	30,857	2.61	34,228	2.47	132.0	10.9
Racine.....	70,819	2.59	75,651	2.52	51.9	6.8
Walworth.....	34,505	2.57	39,699	2.51	114.1	15.1
Washington.....	43,843	2.65	51,605	2.53	196.8	17.7
Waukesha.....	135,229	2.63	152,663	2.52	146.5	12.9

Source: U.S. Bureau of the Census and SEWRPC.

Table II-10

MEDIAN VALUE FOR SPECIFIED OWNER-OCCUPIED HOUSING UNITS IN WISCONSIN AND THE REGION: 1970 - 2010

ACTUAL REPORTED DOLLARS

Area	1970	1980	1990	2000	2010	Average Annual Percent Change				
						1970-1980	1980-1990	1990-2000	2000-2010	1970-2010
Wisconsin	17,300	48,900	62,500	112,200	169,400	10.9	2.5	6.0	4.2	5.9
Region	20,500	57,900	73,700	130,700	194,122	10.9	2.4	5.9	4.0	5.8
Counties										
Kenosha	16,800	48,400	65,100	120,900	170,700	11.2	3.0	6.4	3.5	6.0
Milwaukee	20,200	53,300	65,300	103,200	162,500	10.2	2.1	4.7	4.6	5.4
Ozaukee	26,100	75,400	100,500	177,300	262,400	11.2	2.9	5.8	4.0	5.9
Racine	17,800	51,000	64,200	111,000	177,600	11.1	2.3	5.6	4.8	5.9
Walworth	17,100	50,900	69,100	128,400	205,300	11.5	3.1	6.4	4.8	6.4
Washington	20,900	64,600	83,900	155,000	235,300	11.9	2.6	6.3	4.3	6.2
Waukesha	25,300	75,300	96,300	170,400	260,500	11.5	2.5	5.9	4.3	6.0

CONSTANT 2010 DOLLARS

Area	1970	1980	1990	2000	2010	Average Annual Percent Change				
						1970-1980	1980-1990	1990-2000	2000-2010	1970-2010
Wisconsin	96,700	125,900	103,800	139,500	169,400	2.7	(1.9)	3.0	2.0	1.4
Region	114,600	149,100	122,400	162,500	194,100	2.7	(2.0)	2.9	1.8	1.3
Counties										
Kenosha	93,900	124,600	108,100	150,300	170,700	2.9	(1.4)	3.4	1.3	1.5
Milwaukee	112,900	137,200	108,500	128,300	162,500	2.0	(2.3)	1.7	2.4	0.9
Ozaukee	145,900	194,200	166,900	220,400	262,400	2.9	(1.5)	2.8	1.8	1.5
Racine	99,500	131,300	106,600	138,000	177,600	2.8	(2.1)	2.6	2.6	1.5
Walworth	95,600	131,100	114,800	159,600	205,300	3.2	(1.3)	3.3	2.5	1.9
Washington	116,800	166,300	139,300	192,700	235,300	3.6	(1.8)	3.3	2.0	1.8
Waukesha	141,400	193,900	159,900	211,800	260,500	3.2	(1.9)	2.9	2.1	1.5

NOTES: Specified owner-occupied housing units exclude mobile homes, houses with a business or medical office, houses on 10 or more acres of land, and housing units in multiunit buildings.

Source: U.S. Bureau of the Census American Community Survey and SEWRPC.

Table II-11

HOUSEHOLDS PAYING MORE THAN 30 PERCENT OF THEIR INCOME FOR HOUSING IN WISCONSIN AND THE REGION: 1989, 1999, AND 2010

Area	Homeowner Households for which Ownership Costs Exceed 30 Percent of the Household Income					
	1989		1999		2010	
	Number of Households	Percent of Homeowner Households	Number of Households	Percent of Homeowner Households	Number of Households	Percent of Homeowner Households
Wisconsin	140,026	15.1	199,967	17.8	443,213	28.3
Region	55,219	16.0	78,789	19.6	157,328	31.2
Counties						
Kenosha	4,073	15.1	6,805	20.6	14,698	34.3
Milwaukee	26,335	16.8	32,316	19.7	65,944	33.2
Ozaukee	2,757	16.6	4,095	19.9	6,764	25.6
Racine	5,061	13.6	7,772	17.9	15,517	30.0
Walworth	2,565	17.4	4,459	22.5	8,897	33.6
Washington	2,826	14.7	5,188	18.9	12,332	31.0
Waukesha	11,602	15.8	18,154	19.3	33,176	28.2

Area	Renter Households for which Rental Costs Exceed 30 Percent of the Household Income					
	1989		1999		2010	
	Number of Households	Percent of Renter Households	Number of Households	Percent of Renter Households	Number of Households	Percent of Renter Households
Wisconsin	209,438	36.0	207,242	32.3	331,910	46.5
Region	99,681	38.5	97,001	35.2	144,719	50.1
Counties						
Kenosha	5,171	36.0	5,998	35.0	9,558	46.2
Milwaukee	72,879	40.9	66,074	37.0	94,781	52.7
Ozaukee	1,971	31.1	1,896	26.4	3,328	43.6
Racine	7,181	36.2	7,022	34.1	11,252	48.8
Walworth	2,954	34.4	3,501	33.9	5,609	44.5
Washington	2,077	25.4	2,748	26.6	4,922	42.8
Waukesha	7,448	31.6	9,762	31.0	15,269	45.7

NOTES: Home ownership costs include mortgages, real estate taxes, insurance, utilities, and fuels.
Rental costs include contract rent, utilities, and fuels.

Source: U.S. Bureau of the Census American Community Survey and SEWRPC.

Table II-12

HOUSEHOLD PROJECTIONS FOR WISCONSIN AND THE REGION: 2000-2035

Area	Actual Persons per Household: 2000 (Census)	Projected Persons per Household: 2035	Projected Change in Households: 2000-2035		Household Size	
			Number	Percent	Actual Persons per Household: 2000	Projected Persons per Household: 2035
Region	749,039	925,772	176,733	23.6	2.52	2.39
Counties						
Kenosha	56,057	82,949	26,892	48.0	2.60	2.46
Milwaukee	377,729	427,451	49,722	13.2	2.43	2.29
Ozaukee	30,857	39,989	9,132	29.6	2.61	2.45
Racine	70,819	83,975	13,156	18.6	2.59	2.46
Walworth	34,505	54,410	19,905	57.7	2.57	2.47
Washington	43,843	62,849	19,006	43.4	2.65	2.45
Waukesha	135,229	174,149	38,920	28.8	2.63	2.50

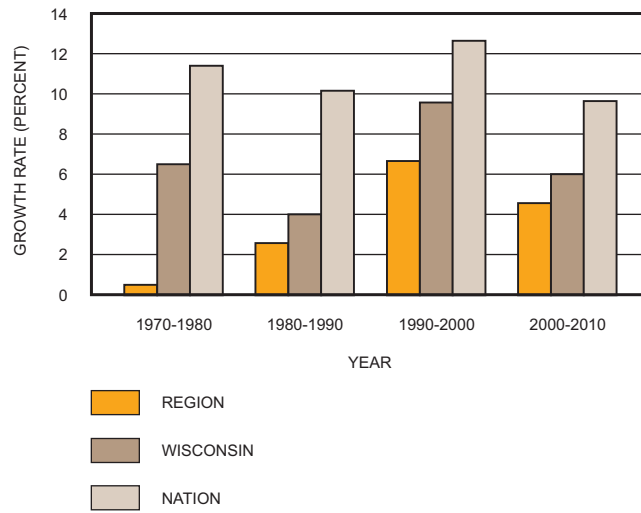
NOTES: 2035 projections for counties and Region are from SEWRPC.
2035 projection for Wisconsin is from the Wisconsin Department of Administration.

Source: U.S. Bureau of the Census, Wisconsin Department of Administration, and SEWRPC.

#200795

Figure II-1

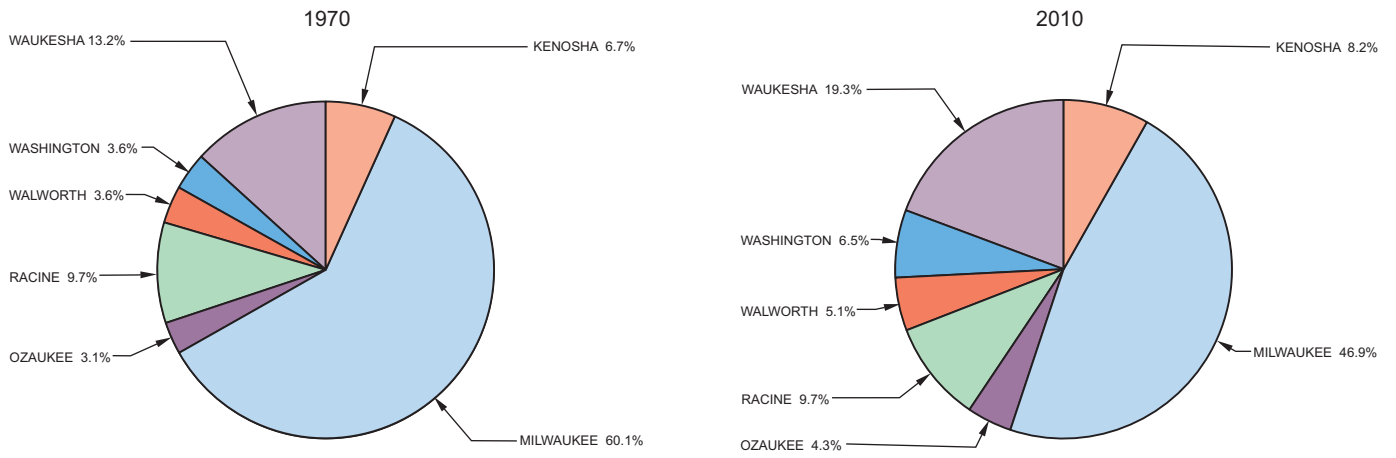
HISTORIC POPULATION GROWTH RATES IN THE NATION, WISCONSIN, AND THE REGION



Source: U.S. Bureau of the Census and SEWRPC.

Figure II-2

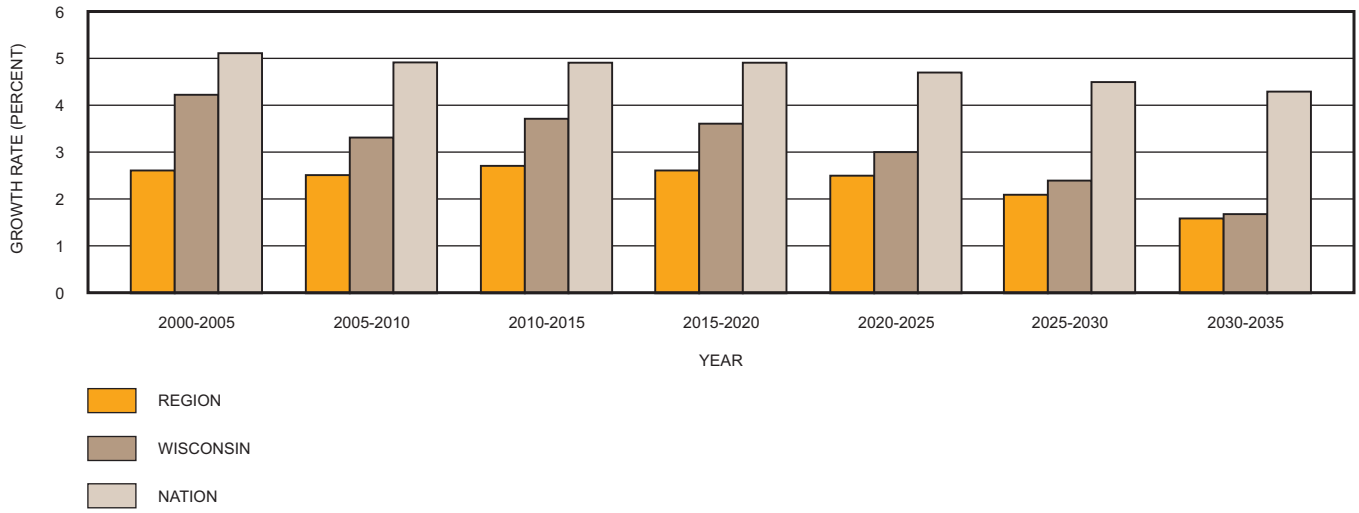
SHARE OF REGIONAL POPULATION BY COUNTY: 1970 AND 2010



Source: U.S. Bureau of the Census and SEWRPC.

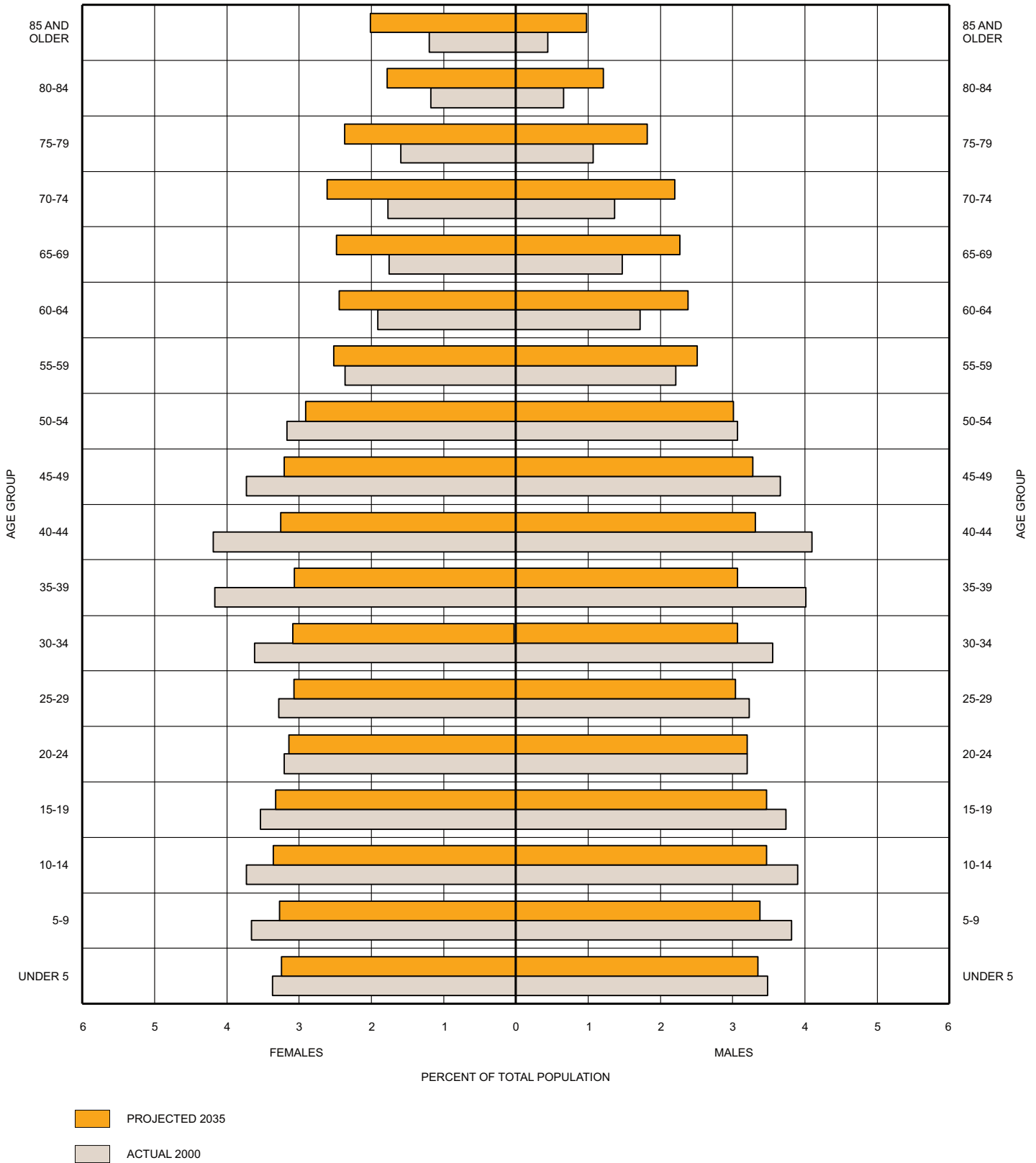
Figure II-3

PROJECTED POPULATION GROWTH RATES IN THE NATION, WISCONSIN, AND THE REGION



Source: U.S. Bureau of the Census, Wisconsin Department of Administration, and SEWRPC.

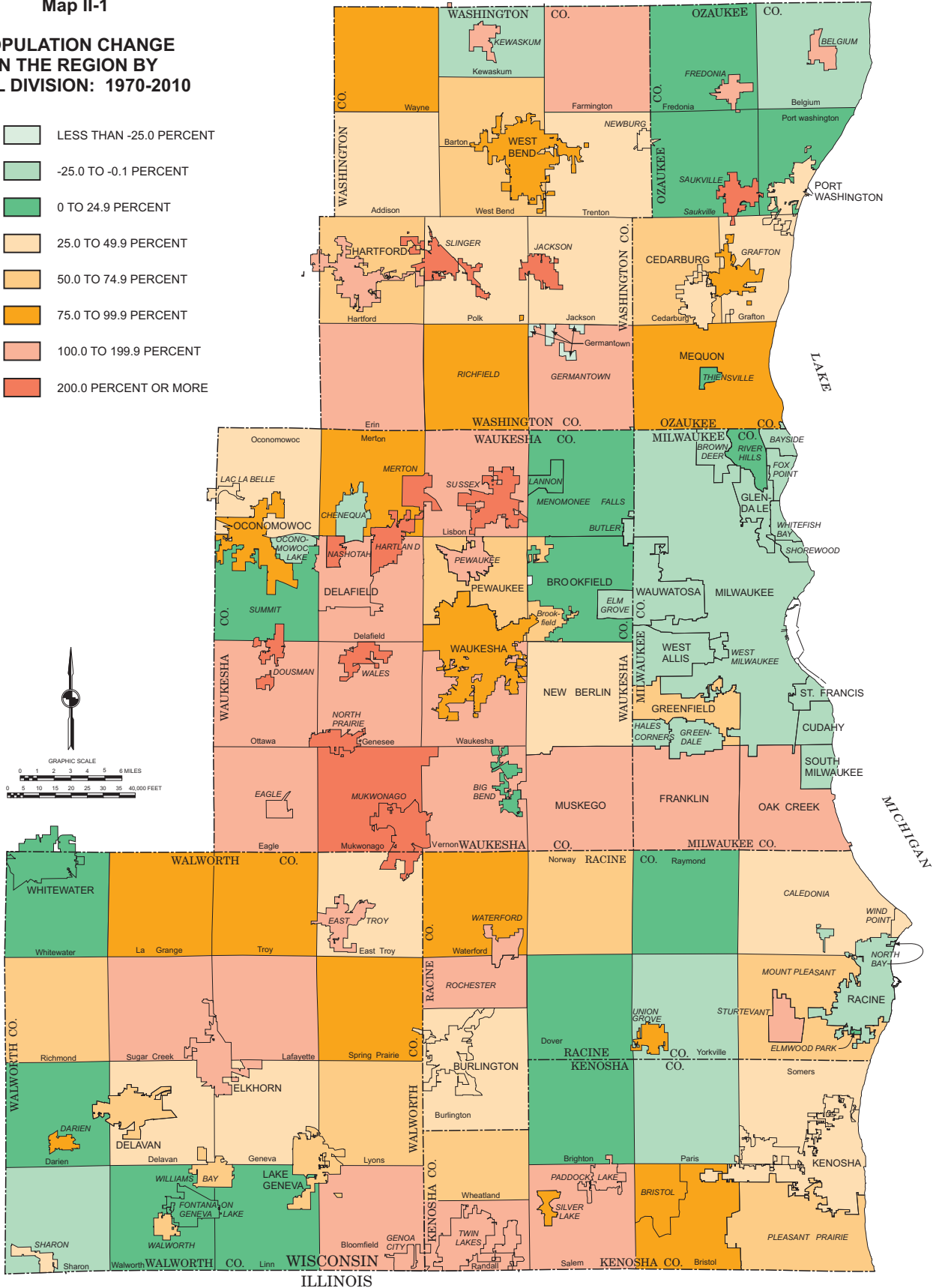
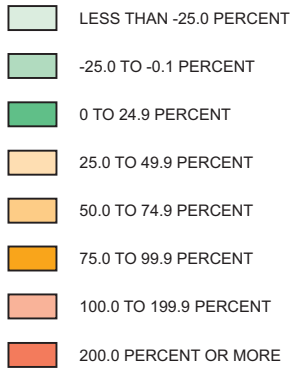
Figure II-4
PROJECTED REGIONAL POPULATION BY AGE GROUP: 2035



Source: U.S. Bureau of the Census and SEWRPC.

Map II-1

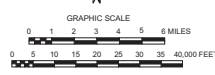
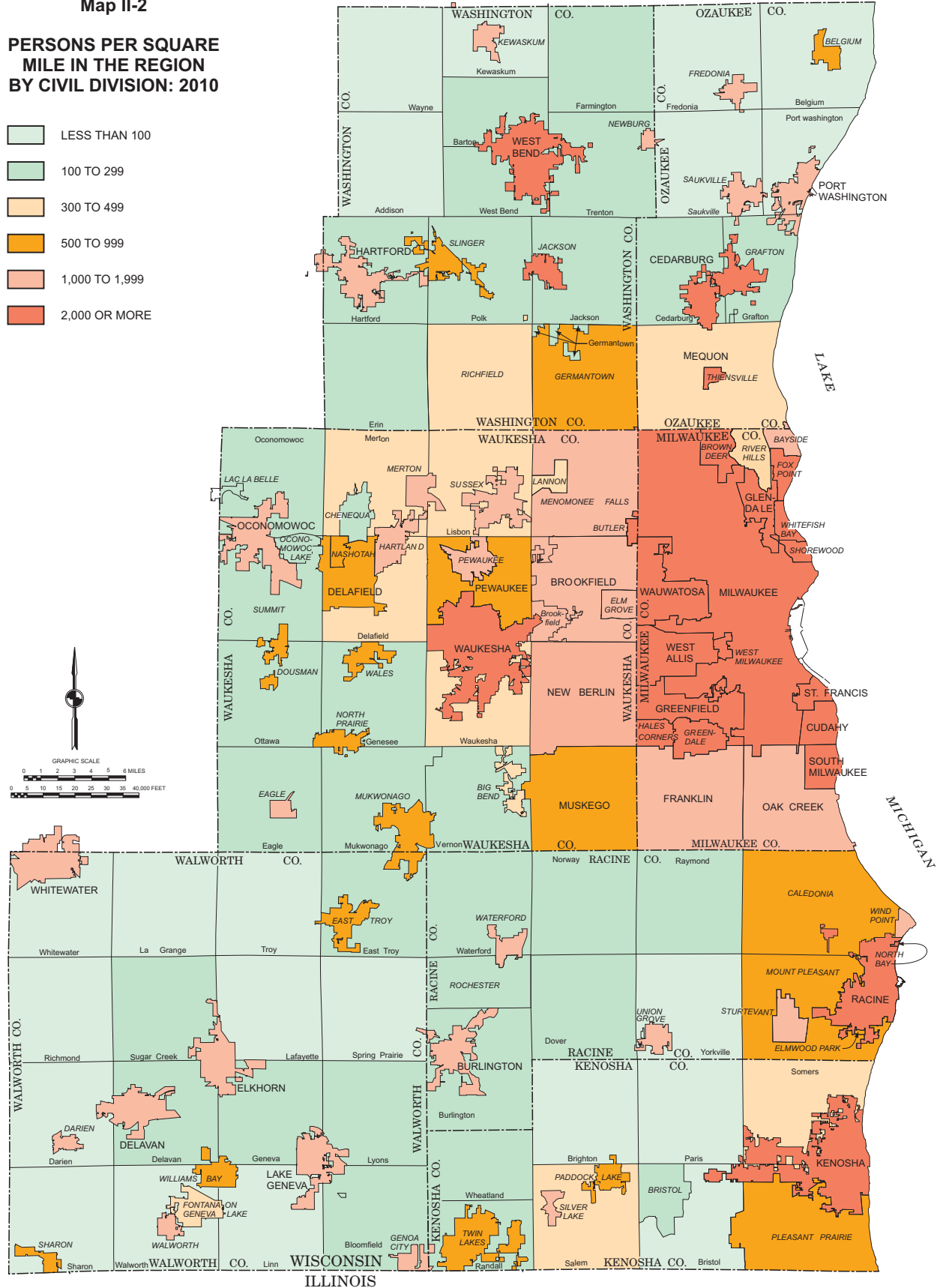
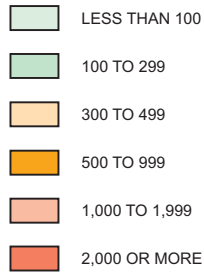
**POPULATION CHANGE
IN THE REGION BY
CIVIL DIVISION: 1970-2010**



Source: SEWRPC.

Map II-2

PERSONS PER SQUARE MILE IN THE REGION BY CIVIL DIVISION: 2010



Source: SEWRPC.

**COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY
FOR SOUTHEASTERN WISCONSIN: 2015 - 2020**

Chapter III

REGIONAL GEOGRAPHY, RESOURCES, AND LAND USE

INTRODUCTION

Geography, resources, land use, and development patterns all have an impact on the economy of the seven-county Southeastern Wisconsin Region. This chapter presents basic information on the political geography of the Region, its natural and cultural resources, and existing and planned land use development patterns.

POLITICAL GEOGRAPHY

The Region is comprised of seven counties. Four of those counties – Kenosha, Racine, Milwaukee, and Ozaukee – lie along the Lake Michigan shoreline just north of the Wisconsin-Illinois border. Three counties – Walworth, Waukesha, and Washington – lie to the west of the four lake shore counties. These seven counties collectively comprise an area of about 2,689 square miles, or about 5 percent of the total area of the State of Wisconsin.

As shown on Map III-1, the Region contains the entirety of four U.S. Census-defined urbanized areas – Kenosha, Milwaukee, Racine, and West Bend – as well as the northerly portion of the Round Lake Beach – McHenry – Grayslake urbanized area, the major portion of which lies in adjoining Illinois. In 2010 these five urbanized areas housed about 1.73 million persons, or about 86 percent of the regional population of about 2.02 million persons. The proximity of the Region to the greater Chicago metropolitan area immediately south of the Wisconsin-Illinois State line has significant ramifications for the economy of the Region and any regional economic development strategy.

In terms of local municipalities, the Region in 2015 was comprised of 29 cities, 62 villages, and 57 towns (see Map III-2). Collectively, the cities and villages house about 1.77 million regional residents, or 87 percent of the 2010 regional population. The towns, which under Wisconsin law are unincorporated municipalities and which are subject to the loss of territory through annexation efforts by adjacent incorporated cities or villages, house the remaining 253,430 persons, or 13 percent of the regional population.

CLIMATE

Climate, especially extreme variations in three principal elements of climate—temperature, precipitation, and snow cover—directly affects the growth and development of an area. Climate has important economic implications. Rainfall and temperature affect the kinds of agricultural crops which can be produced, as well as the yields. Rainfall, temperature, and snow cover affect the design of buildings and structures of various kinds and the cost of operating and maintaining both private and public facilities and services.

General Climatic Conditions

Wisconsin's mid-continent location, far removed from the moderating effect of the oceans, gives the Region a typical continental type climate characterized primarily by a continuous progression of markedly different seasons and a large range in annual temperature. Low temperatures during the long, cold winter are accentuated by prevailing frigid northwesterly winds during the winter period; summer high temperatures are reinforced by the warm southwesterly winds common during that season.

The Southeastern Wisconsin Region is positioned astride cyclonic storm tracks along which low pressure centers move from the west and southwest. The Region also lies in the path of high pressure centers moving in a generally southeasterly direction. This location at the confluence of major migratory air masses results in the Region as a whole being influenced by a continuously changing pattern of different air masses having alternately low and high pressure centers. This results in frequent weather changes being superimposed on a large annual range in weather characteristics, particularly in winter and spring, when distinct weather changes normally occur at least once every two or three days. These temporal weather changes consist of marked temperature variations as well as variations in the type and amount of precipitation, relative humidity, wind magnitude and direction, and cloud cover.

Because of its proximity to Lake Michigan, the Region also exhibits spatial variations in weather, particularly during the spring, summer, and fall, when the temperature differential between the lake water and land air masses tends to be the greatest. During these periods the presence of the lake tends to moderate the climate of the eastern border of the Region.

Temperature

Data for six selected temperature observations stations in the Region are presented in Table III-1 and Figure III-1. These data, which encompass periods of record ranging from 46 to 65 years for the various observations, indicate the temporal and spatial variations in temperature and the temperature ranges which may be expected to occur within the Region. The temperature data also illustrate how regional air temperatures lag approximately one month behind summer and winter solstices during the annual cycle, with the result that July is the warmest month in southeastern Wisconsin and January the coldest. The effects of Lake Michigan are also indicated by those data when comparisons are made between inland and shoreland observation stations that have the same latitude.

The growing season, which is defined as the number of days between the last 32°F freeze in the spring and the first in the fall, averages about 165 days for the Region. The lakeshore area has a growing season of about 175 days, while inland locations have a shorter growing season of about 155 days. The last 32°F frost in the spring normally occurs during the last week of April for areas near Lake Michigan, and during the first half of May for inland locations. The first freeze in the fall usually occurs in a two-week span during mid-October for all locations in the Region.

Precipitation

Precipitation within the Southeastern Wisconsin Region takes the form of rain, sleet, hail, and snow. It ranges from gentle showers of trace quantities to destructive thunderstorms. Major rainfall and snowmelt events can cause property and crop damage, inundation of poorly drained areas, and stream flooding. Annual precipitation in the Region averages about 32 inches, with the greatest amount concentrated in the six months of the growing season. The wettest months are June and July with about three to four inches, and the driest month is February with amounts of about one inch.

Precipitation and snowfall data for six representative precipitation observation stations in the Region are presented in Table III-2 and Figure III-2. These data illustrate the temporal and spatial variations in the type and amount of precipitation that normally occur within the Region. The precipitation data indicate that Lake Michigan does not have as pronounced an effect on precipitation within the Region as it does on temperature.

The influence of Lake Michigan as a source of moisture is reflected by slightly higher seasonal snowfalls for the entire Region relative to inland areas lying west of the Region. Minor intraregional spatial snowfall differences

occur in that seasonal snowfall tends to be greatest in the topographically higher northwest portion of the region because moisture masses moving through that area are forced up onto the higher terrain, where low temperatures normally associated with increased height induce more snowfall than that which would occur in the absence of topographic barrier.

Snow Cover

Snow depth as measured at Milwaukee for the 94-year period of 1900 through 1993 is summarized and presented in Table III-3. The tabulated data pertain to snow depth on the ground as measured at the place and time of observation, and are not a direct measure of average snowfall. Recognizing that snowfall and temperatures, and therefore snow accumulation on the ground, vary spatially within the Region, the Milwaukee area data presented in Table III-3, should be considered as an approximation of conditions that may be encountered in other parts of the Region. As indicated by the data, snow cover is most likely during months of December, January, and February, during which at least a 0.40 probability exists of having one-inch or more of snow cover at Milwaukee.

The landforms and physical features of the Region, such as the topography and drainage pattern, are important determinants of regional growth and development. The Region is located in the Upper Midwest between Lake Michigan on the east, the Green Bay-Lake Winnebago lowlands on the north, the Rock River basin on the west, and the low dunes and swampland at the headwaters of the Illinois River on the south. The Region extends for approximately 52 miles from east to west at its widest point, and approximately 72 miles from north to south, encompassing approximately 2,613 square miles of land area and 76 square miles of inland water area, exclusive of Lake Michigan, for a total gross land and water area of approximately 2,689 square miles. Topographic elevations range from approximately 580 feet above sea level at the Lake Michigan shore, to about 1,320 feet at Holy Hill in southwestern Washington County. The Region lies astride a major subcontinental divide between the upper Mississippi River and the Great Lakes-St. Lawrence River drainage basins and thus is subject to the water diversion provisions of the Great Lakes Compact.

Glaciation has largely determined that physiography and topography as well as the soils of the Region. The physiographic features, that is, surficial land forms of southeastern Wisconsin, are shown on Map III-3. The variation in elevation within the Region is shown in a generalized manner on Map III-4. There is evidence of four major stages of glaciation in the Region. The last and most influential in terms of present physiography and topography was the Wisconsin stage, which is believed to have ended in the State about 11,000 years ago.

The dominant physiographic and topographic feature is the Kettle Moraine, an interlobate glacial deposit, or moraine, formed between the Green Bay and Lake Michigan tongues, or lobes, of the continental glacier which moved in a generally southerly direction from its origin in what is now Canada. Topographically high points in the Kettle Moraine include areas in southwestern Waukesha County north of Eagle, areas in central Waukesha County around Lapham Peak, and areas around Holy Hill and Hartford in southwestern and western Washington County. The Kettle Moraine, which is oriented in a general northeast-southwest direction across western Washington, Waukesha, and northwestern Walworth Counties, is a complex system of hummocky sand and gravel including kames, or crudely stratified conical hills; kettle holes, marking the site of buried glacial ice blocks that became separated from the ice mass and melted to form depressions; eskers, which consist of long, narrow ridges of drift deposited in tunnels in the ice; and abandoned drainageways. It forms some of the most attractive and interesting landscapes within the Region, and is, as well, the area of the highest elevation and the area of greatest local elevation difference, or relief, within southeastern Wisconsin. The Kettle Moraine of Wisconsin, much of which lies within the Region, is considered one of the finest examples of glacial interlobate moraine in the world.

The remainder of the Region is covered by a variety of glacial landforms and features, including rolling landscapes of heterogeneous material deposited beneath the ice; end moraines, consisting of material deposited at the forward margins of the ice sheet; lacustrine basins, or former lake sites; outwash plains, formed by the action of flowing glacial meltwater; drumlins, or elongated mounds of glacial deposits streamlined parallel to the flow of the glacier; and eskers.

Glacial landforms are of economic significance because some are prime sources of sand and gravel for highway and other construction purposes. Many of the larger topographic depressions of the Region, including the kettle holes, have developed into the numerous lakes which dot large areas of western Washington, Waukesha, and Walworth Counties, and which are popular both as recreational areas and as residential centers.

WATER RESOURCES

Surface water resources, consisting of lakes and streams and their associated wetlands and floodlands, form important elements of the natural resource base of the Southeastern Wisconsin Region. Their contribution to the economic development, recreational activity, and aesthetic quality of the Region is immeasurable. Lake Michigan is a major source of water for domestic, municipal, and industrial users in areas of the Region lying east of the subcontinental divide. The groundwater resources of the Region are hydraulically connected to the surface water resources inasmuch as the former provide the base flow of streams and contribute to inland lake levels. The groundwater resources constitute the major source of supply for domestic, municipal, and industrial water users in areas of the Region lying west of the subcontinental divide.

Surface Water

The surface drainage pattern of the Region is very complex because of the effects of glaciation. The land surface is complex as a result of being covered by glacial deposits, containing thousands of closed depressions that range in size from potholes to large areas. Significant areas of the Region are covered by wetlands, and many streams are mere threads of water through these wetlands.

There are 12 major watersheds in the Region as shown on Map III-5. As also shown on this map, a major subcontinental drainage divide, oriented in a generally northwesterly-southeasterly direction, bisects the Region. About 1,680 square miles, or 62 percent of the Region, are located west of the divide and drain to the Upper Mississippi River system; the remaining 1,009 square miles, or 38 percent, drain to the Great Lakes-St. Lawrence River system. The subcontinental divide not only exerts a major physical influence on the overall drainage pattern of the Region, but also carries with it certain constraints on the diversion of water across the divide, and thereby constitutes an important consideration in comprehensive planning.

Also shown on Map III-5 are the 101 major lakes of at least 50 acres in area and the 1,150-mile perennial stream network in the Region. In addition, the Region encompasses numerous lakes and ponds less than 50 acres in size and an extensive network of smaller, intermittent streams. The Region is bounded on the east by Lake Michigan, with 77 miles of shoreline extending from the Wisconsin-Illinois border to the Ozaukee-Sheboygan County line.

The quality of the Region's surface waters can potentially degenerate as a result of—among other factors—malfunctioning or improperly placed onsite sewage disposal systems; inadequate operation of sewage treatment facilities; inadequate soil conservation and other agricultural practices; construction site erosion; and urban runoff. Lakes and streams may also be adversely affected by the excessive development of lacustrine and riverine areas and the filling of peripheral wetlands. Comprehensive planning must take into account the potential effects of urban and rural development on the quality of surface waters.

Groundwater

Groundwater resources constitute another key element of the natural resource base of the Region. Groundwater not only sustains lake levels and wetlands and provides the base flows of streams in the Region, but also comprises a major source of water supply for domestic, municipal, and industrial water users.

Groundwater occurs within three major aquifers that underlie the Region. From the land's surface downward, they are: 1) the sand and gravel deposits in the glacial drift; 2) the shallow dolomite strata in the underlying bedrock; and 3) the deeper sandstone, dolomite, siltstone, and shale strata. Because of their proximity to the land surface and hydraulic interconnection, the first two aquifers are commonly referred to collectively as the "shallow aquifer," while the latter is referred to as the deep aquifer. Within most of the Region, the shallow and deep

aquifers are separated by the Maquoketa shale, which forms a relatively impermeable barrier between the two aquifers (see Figure III-3).

Like surface water, groundwater is susceptible to depletion in quantity and to deterioration in quality as a result of urban and rural development in the Region. Consequently, comprehensive planning must appropriately consider the potential impacts of urban and rural development on this important resource. Such planning must also take into account, as appropriate, natural conditions which may limit the use of groundwater as a source of water supply, including the relatively high levels of naturally occurring radium in groundwater in the deep sandstone aquifer, found in certain areas of the Region.

ENVIRONMENTAL CORRIDORS

One of the most important tasks completed under the regional planning program for southeastern Wisconsin has been the identification and delineation of areas of the Region in which concentrations of the best remaining elements of the natural resource base occur. Preservation of such areas is important to both the maintenance of the overall environmental quality of the Region and to the continued provision of amenities required to maintain a high quality of life for the resident population.

Under the regional planning program, seven elements of the natural resource base were considered essential to the maintenance of the ecological balance, natural beauty, and overall quality of life in southeastern Wisconsin: 1) lakes, rivers, and streams, and their associated shorelands and floodlands; 2) wetlands; 3) woodlands; 4) prairies; 5) wildlife habitat areas; 6) wet, poorly drained, and organic soils; and 7) rugged terrain and high-relief topography. In addition, there are five additional elements which, although not part of the natural resource base *per se*, are closely related to, or centered upon, that base and are a determining factor in identifying and delineating areas with recreational, aesthetic, ecological, and cultural value. These five additional elements are: 1) existing park and open space sites; 2) potential park and open space sites; 3) historic sites; 4) scenic areas and vistas; and 5) natural areas and critical species habitat sites.

The delineation of these 12 natural resource and natural resource-related elements on maps results, in most areas of the Region, in an essentially linear pattern of relatively narrow, elongated areas which have been termed "environmental corridors" by the Regional Planning Commission. Primary environmental corridors include a variety of the aforementioned important natural resource and resource-related elements and are by definition at least 400 acres in size, two miles in length, and 200 feet in width. Secondary environmental corridors generally connect with the primary environmental corridors and are at least 100 acres in size and one mile in length. In addition, smaller concentrations of natural resource base elements that are separated physically from the environmental corridors by urban or agricultural land uses have also been identified. These areas, which are by definition at least five acres in size, are referred to as isolated natural resource areas.

The preservation of environmental corridors and isolated natural resource areas in essentially natural, open uses yields many benefits, including essential recharge and discharge of groundwater; maintenance of surface and groundwater quality; attenuation of flood flows and stages; maintenance of base flows of streams and watercourses; reduction of soil erosion; abatement of air and noise pollution; provision of wildlife habitat; protection of plant and animal diversity; protection of rare and endangered species; maintenance of scenic beauty; and provision of opportunities for recreational, educational, and scientific pursuits. Conversely, since these areas are generally poorly suited for urban development, their preservation in natural, open uses can help avoid serious and costly developmental problems.

Because of the many interacting relationships existing between living organisms and their environment, the destruction or deterioration of one important element of the total environment may lead to a chain reaction of deterioration and destruction of other elements. The drainage of wetlands, for example, may destroy fish spawning areas, wildlife habitat, groundwater recharge areas, and natural filtration and floodwater storage areas of interconnecting stream systems. The resulting deterioration of surface water quality may, in turn, lead to a deterioration of the quality of the groundwater which serves as a source of domestic, municipal, and industrial

water supply, and upon which low flows of rivers and streams may depend. Similarly, destruction of ground cover may result in soil erosion, stream siltation, more rapid runoff, and increased flooding, as well as the destruction of wildlife habitat. Although the effect of any one of these environmental changes may not in and of itself be overwhelming, the combined effects may eventually lead to a serious deterioration of the underlying and sustaining natural resource base and of the overall quality of the environment for life. In addition to such environmental impacts, the intrusion of intensive urban land uses into such areas may result in the creation of serious and costly developmental problems, such as failing foundations for pavements and structures, wet basements, excessive operation of sump pumps, excessive clear-water infiltration into sanitary sewerage systems, and poor drainage.

Primary Environmental Corridors

As shown on Map III-6, the primary environmental corridors within the Region are located primarily along major stream valleys, around major lakes, and along the Kettle Moraine. These primary environmental corridors contain almost all of the best remaining woodlands, wetlands, and wildlife habitat areas of the Region, and represent a composite of the best remaining elements of the natural resource base. The protection of the primary environmental corridors from additional intrusion by incompatible land uses, degradation, and destruction is one of the key objectives of the adopted regional land use plan. In 2010 primary environmental corridors encompassed about 487 square miles, or about 18 percent of the Region.

Secondary Environmental Corridors

As further shown on Map III-6 secondary environmental corridors are generally located along the small perennial and intermittent streams within the Region. Secondary environmental corridors also contain a variety of resource elements, often remnant resources from primary environmental corridors which have been developed for intensive urban or agricultural purposes. Secondary environmental corridors facilitate surface water drainage, maintain pockets of natural resource features, and provide corridors for the movement of wildlife, as well as for the movement and dispersal of seeds for a variety of plant species. In 2010, secondary environmental corridors encompassed about 81 square miles, or about 3 percent of the Region.

Isolated Natural Resource Areas

In addition to the primary and secondary environmental corridors, other smaller pockets of wetlands, woodlands, surface water, or wildlife habitat exist within the Region. These pockets are isolated from the environmental corridors by urban development or agricultural use, and although separated from the environmental corridor network, these isolated natural resource areas have significant value. They may provide the only available wildlife habitat in an area, usually provide good locations for local parks, and lend unique aesthetic character and natural diversity to an area. Widely scattered throughout the Region, isolated natural resource areas in 2010 encompassed about 81 square miles, or about 3 percent of the Region.

AGRICULTURAL RESOURCES

Agricultural land in the Region has decreased significantly over the past several decades. It is estimated that lands devoted to agricultural use decreased by 22 percent between 1963 and 2000, and by an additional 8 percent between 2000 and 2010. Despite this decrease, a large portion of the total area of the Region remains in agricultural use, and agriculture remains an important component of the regional economy. Based on the SEWRPC regional land use inventory, about 1,156 square miles, or 43 percent of the total area of the Region, were in agricultural use in 2010. This figure includes lands actually used for agriculture—primarily cultivated lands and lands used for pasture—and excludes the wetland and woodland portions of existing farm units.

Map III-7 shows the extent of agricultural land in the Region identified in the year 2010 and further identifies those areas which are covered by highly productive soils—comprised of soils in agricultural capability Class I and Class II, as classified by the USDA Natural Resources Conservation Service. Agricultural lands covered by Class I and Class II soils encompassed about 887 square miles, or 77 percent of all agricultural land in the Region, in

2010. The adopted regional land use plan recommends the preservation of Class I and Class II soils insofar as practicable.

In the Federal census of agriculture conducted in 2007, there were, within the Region 4,227 farms, farms being defined as operations in which at least \$1,000 of agricultural products were sold during the year. The number and size of farms in 1997 and 2007 in Wisconsin, the Region, and the seven counties in the Region is set forth in Table III-4. During that 10-year period, the number of farms declined by nearly 8 percent, with the average farm size declining slightly. The market value of farm production in 1977 and 2007 for Wisconsin, the Region, and the seven counties is shown in Table III-5. Within the Region, crop sales somewhat exceeded the sales from livestock in 2007.

MINERAL RESOURCES

All mineral resource production in the Region is of nonmetallic material, consisting mostly of sand and gravel, along with crushed stone and limestone in some areas. Mineral extraction sites in the Region are shown on Map III-8. This map show active mineral extraction sites as well as sites which are inactive but which have not yet been reclaimed.

Many areas of the Region have potential commercially workable deposits of sand and gravel, the areas with the highest potential consisting of glacial outwash deposits in Ozaukee, Walworth, and Washington Counties and the westerly portions of Kenosha, Racine, and Waukesha Counties. Areas of the Region with the highest potential for crushed stone and building stone operations are those where the underlying bedrock is relatively close to the surface. Within the Region, these areas tend to occur primarily in Washington and Waukesha Counties, along a northeasterly-southwesterly alignment generally paralleling the interlobate Kettle Moraine. The largest stone producing operations in the Region are located in northeastern Waukesha County.

PARK AND OPEN SPACE SITES

Public park and open space sites and holdings of land trusts for preservation purposes that existed in the Region as of 2009 are shown on Map III-9. Collectively, these sites comprise about 191 square miles, or about 7 percent of the Region. State land holdings dominate, followed by county land holdings. Federal park and open space sites in the Region are minimal. The park and open space sites provide ample opportunity for a wide variety of outdoor pursuits and activities throughout the year.

AIR QUALITY

The Clean Air Act requires the U.S. Environmental Protection Agency (EPA) to set national ambient air quality standards (NAAQS) for six criteria pollutants (carbon monoxide, lead, nitrogen dioxide, particulate matter, ozone, and sulfur oxides) which are considered harmful to public health and the environment. Benefits of attaining air quality standards include reduced mortality, hospital admissions due to respiratory ailments, school and work absenteeism, and incidence of asthma. Areas not meeting the NAAQS for one or all of the criteria pollutants are designated as nonattainment areas by the EPA. In areas where observed pollutant levels exceed the established NAAQS and which are designated as “nonattainment” areas by the EPA, growth and development patterns may be constrained. For example, major sources of pollutants seeking to locate or expand in a designated nonattainment area, or close enough to impact upon it, must apply emission control technologies. In addition, new or expanding industries may be required to obtain a greater than one-for-one reduction in emissions from other sources in the nonattainment area so as to provide a net improvement in ambient air quality. Nonattainment area designation may, therefore, create an economic disincentive for industry with significant emission levels to locating or expanding within or near the boundaries of such an area. In order to eliminate this disincentive and relieve the potential constraint on development, it is necessary to demonstrate compliance with the NAAQS and petition the EPA for redesignation of the nonattainment areas. Areas designated as being in nonattainment or in maintenance of a NAAQS are also required to demonstrate that transportation plans and programs are consistent

with air quality goals established by State implementation of maintenance plans to ensure that the plans and programs do not prevent continued improvement in air quality and achievement or maintenance of a NAAQS.

Over the past decade, the combination of local controls and offsets implemented within and external to the Region, along with national vehicle emissions control requirements, have resulted in a significant improvement in ambient air quality within the Region as well as nationally. The Southeastern Wisconsin Region currently meets all but the ozone NAAQS. The EPA has designated Kenosha County east of IH 94 as a part of the Tri-State Chicago-Naperville, IL-IN-WI Marginal Nonattainment Area for the 2008 8-hour ozone standard.¹ Ozone is formed when precursor pollutants, such as volatile organic compounds and nitrogen oxides, react in the presence of sunlight. The ozone air quality problem within the Region is a complex problem because ozone is meteorologically dependent. In addition, the ozone problem in the Region is believed to be attributable in large part to precursor emissions which are generated in the large urban areas located to the south and southeast and carried by prevailing winds into the Region. The ozone problem thus remains largely beyond the control of the Region and State and can be effectively addressed only through a multi-state abatement effort.

LAND USE

Land use — historic, existing, and planned — is an important consideration in the preparation of an economic development strategy. SEWRPC tracks urban growth and development through land use inventories conducted at ten-year intervals. In addition, SEWRPC prepares and adopts, in cooperation with its county and local government partners, a regional land use plan that identifies a recommended land use development pattern for the future.

Historic Urban Growth

The SEWRPC urban growth analysis shows the historical pattern of urban settlement, growth, and development of the Region since 1850 for selected points in time. Areas identified as urban under this time series analysis include areas of the Region where residential structures or other buildings have been constructed in relatively compact groups, thereby indicating a concentration of residential, commercial, industrial, governmental, institutional, or other urban land uses. In addition, the identified urban areas encompass certain open space lands such as urban parks and small areas being preserved for resource conservation purposes within the urban areas.

Urban growth for the years prior to 1940 was identified using a variety of sources, including the records of local historical societies, land subdivision plat records, farm plat maps, U. S. Geological Survey maps, and Wisconsin Geological and Natural History Survey records. Urban growth for the years 1940, 1950, 1963, 1970, 1980, 1990, 2000, and 2010 was identified using aerial photographs. Because of limitations inherent in the source materials, information presented for the years prior to 1940 represents the extent of urban development at approximately those points in time, whereas the information presented for later years can be considered precisely representative of those respective points in time.

The urban growth analysis is presented graphically on Map III-10. In 1850, the urban portion of the Region was concentrated primarily in the larger urban centers located at Burlington, Kenosha, Milwaukee, Racine, Waukesha, and West Bend, along with many smaller settlements throughout the Region. Over the 100-year period from 1850 to 1950, urban development in the Region occurred in a pattern resembling concentric rings around existing urban centers, resulting in a relatively compact regional settlement pattern. After 1950, there was a significant change in the pattern and rate of urban development in the Region. While substantial amounts of development continued to occur adjacent to established urban centers, considerable development also occurred in isolated enclaves in outlying areas of the Region.

¹ *There is also a three-county maintenance area for the 2006 24-hour fine particulate standard consisting of the counties of Milwaukee, Racine, and Waukesha, requiring offsets and other measures to ensure that this standard continues to be met.*

The urban growth analysis, in conjunction with the Federal censuses, provides a basis for calculating urban population and household densities in the Region and changes in density over time. Table III-7 relates the urban area identified by the urban growth analysis with the urban population and households, going back to 1940. In Table III-7, the “urban population” is the total population of the Region excluding the rural farm population, as reported by the U.S. Bureau of the Census; similarly, “urban households” as reported in that table consist of all households other than rural farm households.

As indicated in Table III-7, the population density of the urban portion of the Region—as identified by the urban growth analysis—decreased significantly, from about 10,700 persons per square mile in 1940 to about 5,100 persons per square mile in 1970, 3,900 persons per square mile in 1980, 3,500 persons per square mile in 1990, 3,300 persons per square mile in 2000, and 3,200 persons per square mile in 2010. The long-term decrease in the urban population density is due in part to a trend toward lower density residential development. The decrease is also attributable to significant increases in the number of jobs—jobs having increased at a faster rate than population since 1960—and the attendant increase in commercial and industrial development in the Region. Part of the decrease in the urban population density also relates to the fact that the number of persons per household—the household being the basic unit of demand for residential development—has decreased by 25 percent since 1950.

A different density trend for the Region emerges when urban density is calculated based upon households rather than population (see Figure III-4). Since 1963, the relative decrease in urban household density has been much lower than the decrease in urban population density. Between 1963 and 2010, the urban household density decreased by 23 percent, compared to a 43 percent decrease in the urban population density.

Existing Land Use

The SEWRPC land use inventory is intended to serve as a relatively precise record of land use for the entire area of the Region at selected points in time. The land use classification system used in the inventory consists of nine major categories which are divided into 66 sub-categories. Aerial photographs serve as the primary basis for identifying existing land use, augmented by field surveys as appropriate. The most recent regional land use inventory was carried out based upon aerial photography taken in spring of 2010. The results of that inventory are summarized on Map III-11 and Table III-8.

Areas considered “developed” under the land use inventory include areas identified as being in residential, commercial, industrial, transportation-communication-utility, governmental-institutional, or intensive recreational uses. In 2010, developed land uses identified in the regional land use inventory encompassed about 779 square miles, or 29 percent of the total area of the Region. Residential land comprised the largest developed land use category, encompassing about 401 square miles, or about 51 percent of all developed land and about 15 percent of the overall area of the Region. In combination, commercial and industrial lands encompassed about 71 square miles, or about 9 percent of all developed land and about 2 percent of the Region overall. Land used for governmental and institutional purposes encompassed 37 square miles, or 3 percent of all developed land and 1 percent of the Region overall. Land devoted to intensive recreational uses encompassed about 56 square miles, or 7 percent of all developed land and 2 percent of the Region overall. Land devoted to transportation, communication, and utility uses—including areas used for streets and highways, railways, airports, and utility and communication facilities—totaled 214 square miles, or 27 percent of all developed land and 8 percent of the Region overall.

Land uses considered “undeveloped” under the land use inventory include agricultural lands, wetlands, woodlands, surface water, extractive and landfill sites, and “unused” lands. In 2010, undeveloped lands identified in the regional land use inventory encompassed about 1,911 square miles, or 71 percent of the total area of the Region. Agricultural land constituted the largest undeveloped land use category, encompassing 1,156 square miles, representing about 60 percent of all undeveloped land and about 43 percent of the overall area of the Region. Wetlands, woodlands, and surface water together encompassed 591 square miles, representing about 31 percent of all nonurban land and 22 percent of the Region overall. All other lands classified as “undeveloped”

with urban uses, including extractive, landfill, and unused lands, encompassed 165 square miles, representing about 6 percent of the overall area of the Region.

Planned Land Use

The current SEWRPC regional land use plan is for the design year 2035.² The regional land use plan is intended to accommodate the anticipated growth in population, households, and employment in a manner consistent with a series of land development objectives and standards. The plan, shown on Map III-12, embodies the following vision for the Region:

New urban land would be provided through the infilling and renewal of existing urban areas and through the orderly outward expansion of existing urban areas—resulting in a more compact and efficient urban settlement pattern, one that is readily served by basic urban services and facilities and that maximizes the use of existing urban service and facility systems.

- Residential development and redevelopment would occur in a variety of residential neighborhood types and in mixed use settings—with an emphasis on medium and high residential densities.
- Growth in the economic base of the Region would be accommodated through the development and redevelopment of major economic activity centers as well as community-level and neighborhood-level centers.
- The land development needs of the Region would be met while preserving the best remaining elements of the natural resource base—most of which are located within the environmental corridors and isolated natural resource areas—and preserving the most productive farmland.

The regional land use plan was designed to accommodate growth in population, households, and employment in the Region envisioned under the SEWRPC’s intermediate growth projections reported in Chapters II and V, including an 18 percent increase in population, a 24 percent increase in households, and a 12 percent increase in employment in the Region through the year 2035.

By 2010 nearly all county and local governments in the Region had prepared and adopted new comprehensive development plans to meet the requirements of the State’s “smart growth” law. To a large extent, these more detailed county and local plans refine and detail the regional land use plan graphically summarized on Map III-12, embracing many of the recommendations set forth in the regional plan. In some cases, however, these local plans may vary in significant ways from the regional land use plan, particularly with regard to residential densities and housing unit mixtures and the preservation of prime agricultural lands.

BROWNFIELDS

The Southeastern Wisconsin Region, like many urbanized regions throughout the Country, has many vacant or underutilized sites once devoted to industrial, commercial, and related uses. Factors contributing to the abandonment or underutilization of older commercial and industrial sites vary from site to site, but often include structures which are obsolete in terms of accommodating current manufacturing, warehousing, and office needs; inadequate site access to the transportation system; and insufficient area for horizontally-oriented structures, contemporary parking and loading requirements, and possible future plant expansion needs.

The reuse of brownfield sites does not need to be limited to industrial uses. They may also include a mix of residential, commercial, recreational, and other development, in accordance with local development objectives. The cleanup and reuse of brownfields has many potential benefits in addition to the environmental benefits, which

² *An update of the regional land use and transportation plans to the year 2050 is anticipated to be completed in late 2015.*

may include elimination of blight, increases in property values, expansion of housing stock, creating jobs near concentrations of existing workers and affordable housing, and increased use of existing public infrastructure.

The reuse of former commercial and industrial sites is frequently constrained by contamination problems created by past industrial and commercial activities, giving rise to the term “brownfields,” which are underutilized or abandoned sites known or suspected to be environmentally contaminated. Redevelopment of brownfields is often hindered by high cleanup costs that tend to reduce private-sector interest in these sites. Information on contaminated sites in Wisconsin, including brownfields and the status of completed or on-going cleanup, is available from the Wisconsin Department of Natural Resources (DNR) Bureau for Remediation and Redevelopment’s Contaminated Lands Environmental Action Network (CLEAN) at <http://dnr.wi.gov/topic/Brownfields/clean.html>. The DNR website also includes information on State and Federal financial assistance available to support the cleanup and reuse of contaminated sites.

Several County and local governments in the Region have or are currently working to remediate and redevelop contaminated sites. Examples include the site of the former Chrysler engine plant in the City of Kenosha, the Menomonee Valley and the 30th Street Industrial Corridor in the City of Milwaukee, Machinery Row along the Root River in the City of Racine, and the Washington County Site Revitalization Program, which is a program funded in 2014 to identify and prioritize brownfield sites and complete remedial action plans for high-priority sites.

CULTURAL RESOURCES AND TOURISM

The SEWRPC Region is home to a significant array of venues that support a strong cultural base of activities (see Figure III-5). These venues relate to religion, performing arts, visual arts, history, and sports and other forms of entertainment. They form an important base not only for the residents of the Region to use and enjoy, but also for attracting visitors.

The Wisconsin Department of Tourism prepares estimates of tourism expenditures made by visitors (see Table III-9). Tourism expenditures made by visitors over the period 2000 through 2008 significantly increased throughout the State and Region, followed by a decline in 2009 brought about by the recession.

Table III-1

TEMPERATURE CHARACTERISTICS AT SELECTED LOCATIONS IN THE REGION

Month	Observation Station: ^a Lakeshore Locations								
	Port Washington 1959-2004			Milwaukee 1940-2004			Kenosha 1948-2004		
	Average Daily Maximum ^b	Average Daily Minimum ^b	Mean ^c	Average Daily Maximum ^b	Average Daily Minimum ^b	Mean ^c	Average Daily Maximum ^b	Average Daily Minimum ^b	Mean ^c
January	27.7	11.6	19.7	28.1	13.4	20.7	29.2	13.6	21.4
February	31.8	16.0	23.9	31.6	16.9	24.3	33.1	18.2	25.6
March	40.2	24.8	32.5	41.0	26.0	33.5	41.5	26.4	34.0
April	50.7	34.6	42.6	53.4	36.4	44.9	52.6	36.2	44.4
May	60.8	43.8	52.3	64.6	45.1	54.8	63.2	44.7	54.0
June	71.4	53.4	62.4	75.2	55.5	65.4	74.0	54.6	64.3
July	77.5	60.4	68.9	80.2	62.0	71.1	79.5	61.6	70.6
August	77.0	60.0	68.5	78.7	61.7	70.2	78.5	61.4	70.0
September	70.0	52.7	61.4	71.2	53.6	62.4	71.5	53.4	62.5
October	58.8	41.6	50.2	60.2	42.7	51.5	60.7	42.7	50.8
November	45.1	30.2	37.6	45.3	30.6	38.0	46.9	31.3	39.1
December	34.0	18.5	26.3	32.5	18.8	25.7	34.8	19.4	27.1
Yearly Average	53.7	37.3	45.5	55.2	38.6	46.9	55.5	38.6	47.0

Month	Observation Station: ^a Inland Locations									Regional Summary		
	West Bend 1940-2004			Waukesha 1940-2004			Lake Geneva 1945-2003					
	Average Daily Maximum ^b	Average Daily Minimum ^b	Mean ^c	Average Daily Maximum ^b	Average Daily Minimum ^b	Mean ^c	Average Daily Maximum ^b	Average Daily Minimum ^b	Mean ^c	Average Daily Maximum ^d	Average Daily Minimum ^d	Mean ^e
January	27.0	10.2	18.6	27.0	11.2	19.1	28.9	12.5	20.7	28.0	12.1	20.0
February	30.6	13.6	22.1	31.7	15.8	23.8	33.4	15.9	24.6	32.0	16.1	24.1
March	40.1	23.1	31.6	41.2	24.1	32.7	43.2	24.9	34.1	41.2	24.9	33.1
April	54.9	34.1	44.5	56.0	35.6	45.8	57.7	36.0	46.9	54.2	35.5	44.9
May	66.6	43.9	55.3	67.6	45.8	56.8	70.1	46.2	58.2	65.5	44.9	55.2
June	77.1	54.2	65.6	78.1	55.6	66.9	80.5	56.6	68.6	76.1	55.0	65.5
July	81.7	59.4	70.6	83.0	60.9	71.9	84.6	61.8	73.2	81.1	61.0	71.0
August	79.6	58.5	69.1	80.8	59.7	70.3	83.0	60.5	71.7	79.6	60.3	70.0
September	71.8	50.3	61.1	73.1	51.5	62.4	75.1	52.5	63.8	72.1	52.3	62.3
October	60.7	40.4	50.6	61.9	40.9	51.4	63.0	42.3	52.7	60.9	41.8	51.2
November	44.7	28.4	36.6	45.0	29.2	37.1	46.2	30.2	38.2	45.5	30.0	37.8
December	32.0	16.2	24.1	32.5	17.8	25.2	33.1	18.3	25.8	33.2	18.2	25.7
Yearly Average	55.6	36.0	45.8	56.5	37.3	46.9	58.2	38.1	48.2	55.8	37.7	46.7

^aObservation stations were selected both on the basis of the length of record available and geographic location within the Southeastern Wisconsin Region. Port Washington, Milwaukee, and Kenosha are representative of areas with temperatures influenced by Lake Michigan, whereas West Bend, Waukesha, and Lake Geneva are typical of inland areas having temperatures that are not generally influenced by Lake Michigan. Kenosha and Lake Geneva are representative of southerly areas in the Region, whereas Port Washington and West Bend typify northern locations.

^bThe monthly average daily maximum temperature and the monthly average daily minimum temperature are obtained by using daily measurements to compute an average for each month in the period of record. The results are then averaged for all the months in the period of record.

^cThe monthly mean temperature is the mean of the average daily maximum temperature and the average daily minimum temperature for each month.

^dThe monthly average daily maximum and minimum temperatures for the Region as a whole were computed as averages of the corresponding values for the six observation stations.

^eThe monthly mean for the Region as a whole is the mean of the regional monthly average daily maximum and average daily minimum, which is equivalent to the average of the monthly means for the six observation stations.

Source: National Climatic Data Center and SEWRPC.

Table III-2

PRECIPITATION CHARACTERISTICS AT SELECTED LOCATIONS IN THE REGION

Month	Observation Station ^a																	Regional Summary	
	Lakeshore Locations						Inland Locations						Lake Geneva ^c					Average Total Precipitation	Average Snow and Sleet
	Port Washington		Milwaukee		Kenosha		West Bend		Waukesha ^b		1940-2004		1930-2004		1945-2003		1945-2003		
	1940-2004	1894-2004 ^d	1940-2004	1940-2004	1945-2004	1945-2004	1940-2004	1930-2004	1940-2004	1940-2004	1940-2004	1940-2004	1940-2004	1930-2004	1945-2003	1945-2003	1945-2003	1945-2003	1945-2003
Average Total Precipitation	Average Snow and Sleet	Average Total Precipitation	Average Snow and Sleet	Average Total Precipitation	Average Snow and Sleet	Average Total Precipitation	Average Snow and Sleet	Average Total Precipitation	Average Snow and Sleet	Average Total Precipitation	Average Snow and Sleet	Average Total Precipitation	Average Snow and Sleet	Average Total Precipitation	Average Snow and Sleet	Average Total Precipitation	Average Snow and Sleet	Average Total Precipitation	
January.....	1.43	11.7	1.48	13.1	12.1	1.60	12.9	1.43	1.52	11.7	1.91	12.7	11.7	12.7	1.56	12.3	1.20	9.0	
February.....	1.13	9.5	1.17	10.4	9.8	1.15	8.9	1.08	1.23	7.1	1.45	8.1	7.1	8.1	1.20	9.0	1.20	9.0	
March.....	1.92	7.5	2.02	9.0	7.1	2.26	9.3	1.95	2.20	8.7	2.53	8.5	8.7	8.5	2.15	8.3	2.15	8.3	
April.....	3.03	1.7	3.10	2.7	1.4	3.54	2.3	2.86	3.16	1.8	3.57	2.0	1.8	2.0	3.21	2.0	3.21	2.0	
May.....	3.20	0.1	3.08	0.1	0.1	3.53	0.2	3.20	3.45	0.2	3.49	0.1	0.2	0.1	3.32	0.1	3.32	0.1	
June.....	3.46	0.0	3.39	0.0	0.0	3.73	0.0	3.75	3.87	0.0	4.24	0.0	0.0	0.0	3.74	0.0	3.74	0.0	
July.....	3.35	0.0	3.35	0.0	0.0	3.61	0.0	3.87	3.64	0.0	3.98	0.0	0.0	0.0	3.63	0.0	3.63	0.0	
August.....	3.44	0.0	3.35	0.0	0.0	3.53	0.0	3.51	3.88	0.0	3.70	0.0	0.0	0.0	3.57	0.0	3.57	0.0	
September.....	3.28	0.0	3.33	0.0	0.0	3.30	0.0	3.40	3.27	0.0	3.50	0.0	0.0	0.0	3.35	0.0	3.35	0.0	
October.....	2.17	0.2	2.23	0.3	0.1	2.46	0.1	2.35	2.34	0.0	2.52	0.1	0.0	0.1	2.34	0.1	2.34	0.1	
November.....	2.18	2.3	2.21	2.4	1.7	2.46	3.1	2.27	2.32	2.7	2.44	3.5	2.7	3.5	2.31	2.6	2.31	2.6	
December.....	1.64	7.5	1.67	10.8	8.2	1.84	10.1	1.54	1.73	8.2	2.08	11.0	8.2	11.0	1.75	9.3	1.75	9.3	
Yearly Average	30.24	40.2	31.83	48.6	39.6	33.01	46.7	31.21	33.08	40.4	34.63	45.9	40.4	45.9	32.21	43.6	32.21	43.6	

^a Observation stations were selected both on the basis of the length of record available and geographic location within the Southeastern Wisconsin Region. Port Washington, Milwaukee, and Kenosha are representative of areas where precipitation would be influenced by Lake Michigan, whereas West Bend, Waukesha, and Lake Geneva are typical of inland areas having precipitation that is not generally influenced by Lake Michigan. Kenosha and Lake Geneva are representative of southerly areas in the Region, whereas Port Washington and West Bend typify northern locations.

^b Precipitation and snow and sleet data for Waukesha are not available for the period between 1988 and 1991.

^c Data collection at the Lake Geneva observation station ended June, 2003.

^d Snow and sleet data for Port Washington are based upon the periods 1894 to 1950 and 1960 to 1988; data are not available for the period 1951 to 1959.

Source: National Climatic Data Center and SEWRPC.

Table III-3

SNOW COVER PROBABILITIES AT MILWAUKEE BASED ON DATA FOR 1900 THROUGH 1993

Month and Day	Snow Cover ^a											
	1.0 inch or more		5.0 inches or more		10.0 inches or more		15.0 inches or more		Average (inches)			
	Number of Occurrences ^b	Probability of Occurrences ^c	Number of Occurrences ^b	Probability of Occurrences ^c	Number of Occurrences ^b	Probability of Occurrences ^c	Number of Occurrences ^b	Probability of Occurrences ^c	Per Occurrence ^d	Overall ^e		
November 15	5	0.05	0	0.00	0	0.00	0	0.00	1.3	0.1		
November 30	16	0.17	2	0.02	1	0.01	0	0.00	2.9	0.5		
December 15	41	0.44	14	0.15	0	0.00	0	0.00	3.5	1.5		
December 31	48	0.51	14	0.15	2	0.02	0	0.00	3.6	1.9		
January 15	59	0.63	30	0.32	6	0.06	4	0.04	5.6	3.3		
January 31	64	0.68	30	0.32	13	0.14	5	0.05	6.3	4.3		
February 15	63	0.67	33	0.35	12	0.13	5	0.05	6.2	4.1		
February 28	37	0.39	12	0.13	4	0.04	1	0.01	4.4	1.2		
March 15	29	0.31	9	0.10	4	0.04	0	0.00	3.8	1.2		
March 31	8	0.09	1	0.01	1	0.01	0	0.00	2.7	0.2		

^aData pertain to snow depth on the ground as it was measured at the time and place of observation and are not direct measures of average snowfall.

^bNumber of occurrences is the number of times during the period of record when measurements revealed that the indicated snow depth was reached or exceeded on the indicated date.

^cProbability of occurrence for a given snow depth and date is computed by dividing the number of occurrences by 94, the number of years recorded, and is defined as the probability that the indicated snow cover will be reached or exceeded on the indicated date.

^dAverage snow cover per occurrence is defined as the sum of all snow cover measurements in inches for the indicated date divided by the number of occurrences for that date, that is, the number of occurrences in which 1.0 inch or more of snow cover was recorded.

^eOverall average snow cover is defined as the sum of all snow cover measurements in inches for the indicated date divided by 94, that is, the number of observation times.

Source: U.S. Department of Commerce, National Climatic Data Center, and SEWRPC.

Table III-4

MARKET VALUE OF FARM PRODUCTION IN WISCONSIN AND THE REGION: 1997 AND 2007

Area	1997			2007		
	Crop Sales (in thousands)	Livestock Sales (in thousands)	Total (in thousands)	Crop Sales (in thousands)	Livestock Sales (in thousands)	Total (in thousands)
Wisconsin.....	\$1,754,487	\$4,039,613	\$5,794,100	\$2,669,326	\$6,298,032	\$8,967,358
Region.....	177,998	178,203	356,201	271,451	257,713	529,164
Counties:						
Kenosha	22,734	12,321	35,055	42,333	17,393	59,726
Milwaukee	- ^a	- ^a	8,516	9,678	249	9,927
Ozaukee	11,971	21,094	33,065	20,898	38,159	59,057
Racine	45,347	36,828	82,175	62,456	39,467	101,923
Walworth	46,244	49,180	95,424	65,651	79,868	145,519
Washington	22,670	42,960	65,630	40,013	67,755	107,768
Waukesha	29,032	15,820	44,852	30,422	14,822	45,244

Area	Change: 1997-2007					
	Crop Sales		Livestock Sales		Total Sales	
	(in thousands)	Percent	(in thousands)	Percent	(in thousands)	Percent
Wisconsin.....	\$914,839	52.1	\$2,258,419	55.9	\$3,173,258	54.8
Region.....	93,453	52.5	79,510	44.6	172,963	48.6
Counties:						
Kenosha	19,599	86.2	5,072	41.2	24,671	70.4
Milwaukee	-	-	-	-	1,411	16.6
Ozaukee	8,927	74.6	17,065	80.9	25,992	78.6
Racine	17,109	37.7	2,639	7.2	19,748	24.0
Walworth	19,407	42.0	30,688	62.4	50,095	52.5
Washington	17,343	76.5	24,795	57.7	42,138	64.2
Waukesha	1,390	4.8	(998)	(6.3)	392	0.9

^aWithheld to avoid disclosing data for individual farms.

Source: U.S. Department of Agriculture—National Agricultural Statistics Service and SEWRPC.

Table III-5

NUMBER AND SIZE OF FARMS IN WISCONSIN AND THE REGION: 1997 AND 2007

Area	1997		2007		Change: 1997-2007	
	Number of Farms	Average Farm Size	Number of Farms	Average Farm Size	Number of Farms	Average Farm Size
Wisconsin.....	79,541	204	78,463	194	-1,078	-10
Region.....	4,575	171	4,227	169	-348	-2
Counties:						
Kenosha	481	186	460	183	-21	-3
Milwaukee.....	102	75	96	57	-6	-18
Ozaukee	516	146	513	138	-3	-8
Racine	690	188	652	185	-38	-3
Walworth	1,016	225	1,000	218	-16	-7
Washington.....	953	145	831	156	-122	11
Waukesha.....	817	142	675	128	-142	-14

Source: U.S. Department of Agriculture—National Agricultural Statistics Service and SEWRPC.

Table III-6

EXISTING PUBLIC PARK AND OPEN SPACE SITES AND LAND TRUST HOLDINGS IN THE REGION: 2009

Area	Park and Open Space Sites (Acres)					
	City, Village, and Town ^a	County	State	Federal	Land Trust	Total
Region.....	22,010	30,802	62,177	713	6,659	122,360
Counties:						
Kenosha	3,103	1,894	8,149	--	833	13,978
Milwaukee	1,345	15,090	923	--	217	17,575
Ozaukee	1,322	1,224	3,008	639	1,337	7,530
Racine	2,183	2,746	3,854	74	196	9,052
Walworth	2,090	238	14,830	--	956	18,114
Washington	2,537	1,537	12,519	--	1,627	18,220
Waukesha	9,431	8,072	18,895	--	1,493	37,891

^aIncludes sites of at least 10 acres in area.

Source: SEWRPC.

Table III-7

**URBAN POPULATION DENSITY AND URBAN HOUSEHOLD DENSITY
IN THE SOUTHEASTERN WISCONSIN REGION: 1940-2010**

Year	Urban Area ^a (square miles)	Urban Population		Urban Households	
		Persons ^b	Density (persons per urban square mile)	Households ^c	Density (households per urban square mile)
1940	93	991,535	10,662	272,077	2,926
1950	146	1,179,084	8,076	338,572	2,319
1963	282	1,634,200	5,795	470,856	1,670
1970	338	1,728,666	5,114	529,404	1,566
1980	444	1,749,238	3,940	623,441	1,404
1990	509	1,800,751	3,538	672,896	1,322
2000	579	1,923,674	3,322	746,500	1,289
2010	633	2,012,741	3,180	797,621	1,260

^aBased on the Regional Planning Commission urban growth analysis.

^bTotal population, excluding rural farm population, as reported in the Federal Census; 1963 and 2010 are Commission estimates.

^cTotal households, excluding rural farm households, as reported in the Federal Census; 1963 and 2010 are Commission estimates.

Source: U.S. Bureau of the Census and SEWRPC.

Table III-8

GENERALIZED LAND USES IN THE REGION: 1963-2010

Land Use Category ^a	Existing Land Use							
	1963		1980		2000		2010	
	Square Miles	Percent of Total	Square Miles	Percent of Total	Square Miles	Percent of Total	Square Miles	Percent of Total
Developed Land								
Residential	180.0	6.7	269.1	10.0	361.7	13.4	400.9	14.9
Commercial	11.5	0.4	19.3	0.7	30.2	1.1	35.6	1.3
Industrial	13.5	0.5	22.0	0.8	32.9	1.2	35.2	1.3
Transportation, Communication, and Utilities.....	134.9	5.0	166.1	6.2	202.7	7.5	213.8	8.0
Governmental and Institutional.....	21.8	0.8	30.0	1.1	33.7	1.3	37.0	1.4
Recreational	26.0	1.0	39.3	1.5	50.4	1.9	56.0	2.1
Subtotal: Developed Land	387.7	14.4	545.8	20.3	711.6	26.4	778.5	29.0
Undeveloped Land								
Agricultural.....	1,637.1	60.9	1,475.4	54.9	1,256.4	46.7	1,155.5 ^b	43.0
Natural Resource Areas								
Surface Water	71.6	2.7	76.2	2.8	77.4	2.9	84.7	3.1
Wetlands	274.3	10.2	266.6	9.9	276.5	10.3	315.2	11.7
Woodlands	186.8	6.9	181.9	6.8	184.3	6.9	191.4	7.1
Subtotal: Natural Resource Areas	532.7	19.8	524.7	19.5	538.2	20.1	591.3	21.9
Unused and Other Open Lands ^c	131.7	4.9	143.4	5.3	183.7	6.8	164.5	6.1
Subtotal: Undeveloped Land	2,301.5	85.6	2,143.5	79.7	1,978.3	73.6	1,911.3	71.0
Total	2,689.2	100.0	2,689.3	100.0	2,689.9	100.0	2,689.8	100.0

Land Use Category ^a	Change in Land Use					
	1963-1980		1980-2000		2000-2010	
	Square Miles	Percent	Square Miles	Percent	Square Miles	Percent
Developed Land						
Residential	89.1	49.5	92.6	34.4	39.2	10.8
Commercial	7.8	67.8	10.9	56.5	5.4	17.9
Industrial	8.5	63.0	10.9	49.5	2.3	7.0
Transportation, Communication, and Utilities.....	31.2	23.1	36.6	22.0	11.1	5.5
Governmental and Institutional.....	8.2	37.6	3.7	12.3	3.3	9.8
Recreational	13.3	51.2	11.1	28.2	5.6	11.1
Subtotal: Developed Land	158.1	40.8	165.8	30.4	66.9	9.4
Undeveloped Land						
Agricultural.....	-161.7	-9.9	-219.0	-14.8	-100.9	-8.0
Natural Resource Areas						
Surface Water	4.6	6.4	1.2	1.6	7.3	9.4
Wetlands	-7.7	-2.8	9.9	3.7	38.7	14.0
Woodlands	-4.9	-2.6	2.4	1.3	7.1	3.9
Subtotal: Natural Resource Areas	-8.0	-1.5	13.5	2.6	53.1	9.9
Unused and Other Open Lands ^c	11.7	8.9	40.3	28.1	-19.2	-10.5
Subtotal: Undeveloped Land	-158.0	-6.9	-165.2	-7.7	-67.0	-3.4
Total	0.1	--	0.6	--	-0.1	--

NOTE: As a result of a change in inventory procedures, the 2010 data for agriculture, wetlands and surface water are not directly comparable with data for the year 2000 and prior years. As part of the 2010 land use inventory, wetlands were mapped at a much finer scale and level of detail as compared to prior inventories, increasing the accuracy and precision of wetland mapping throughout the Region and providing for basic consistency with the Wisconsin Wetlands Inventory. This resulted in the identification of more, smaller wetlands than in the past, contributing to the reported increase in the wetland area. This effort also resulted in the identification of more, smaller surface water areas than in the past, contributing to the reported increase in the overall surface water area. The more comprehensive mapping of wetlands and surface water is, in turn, responsible for part of the reported decrease in the agricultural land area of the Region.

^a Off-street parking is included in the associated land use.

^b Includes farmed wetlands, which encompassed 9.6 square miles in 2010.

^c Includes landfills, mineral extraction sites, and unused land.

Source: SEWRPC.

Table III-9

TOURISM EXPENDITURES MADE BY VISITORS IN WISCONSIN AND THE REGION: 2000, 2008, AND 2009

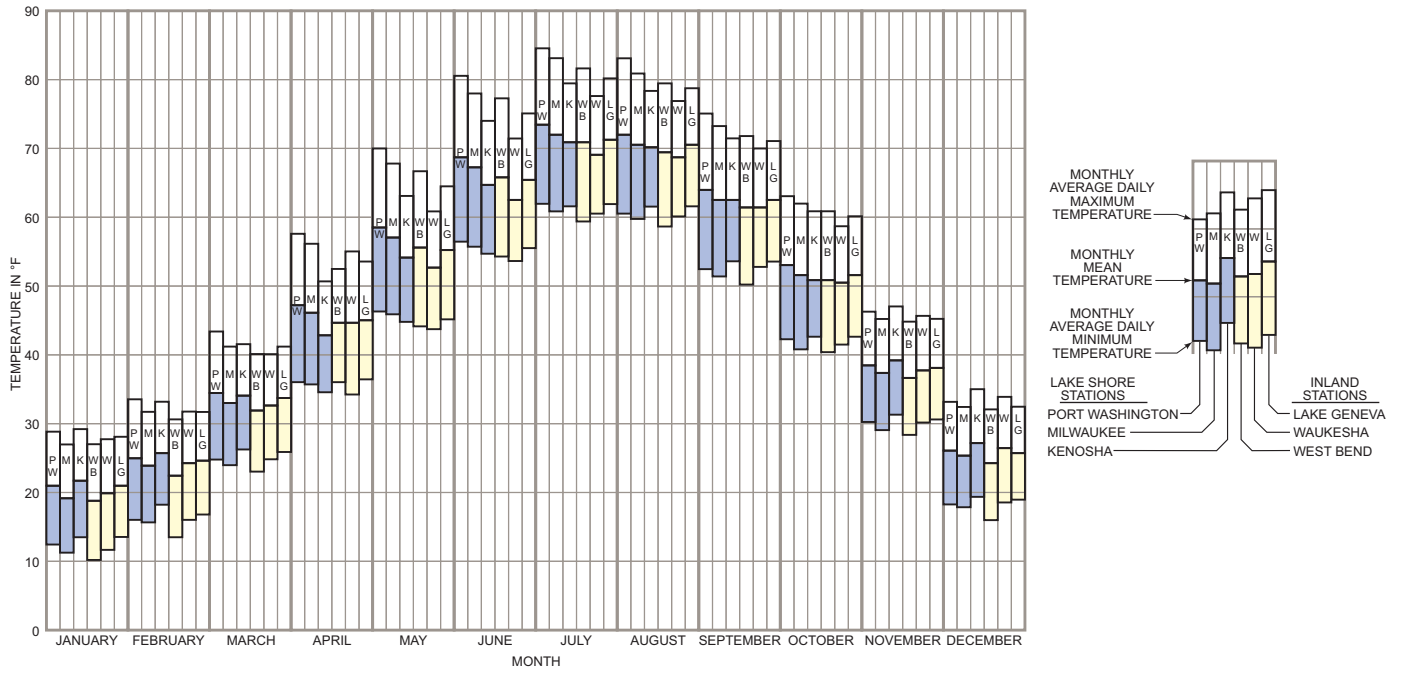
Area	2000	2008	2009	Change: 2000-2009		Change: 2008-2009	
				Dollars	Percent	Dollars	Percent
Wisconsin.....	11,046,539,344	13,115,616,078	12,091,745,226	1,045,205,882	9.5	-1,023,870,852	-7.8
Region.....	3,111,954,664	3,550,785,013	3,149,623,781	37,669,117	1.2	-401,161,232	-11.3
Counties:							
Kenosha	198,118,659	225,205,338	221,219,228	23,100,569	11.7	-3,986,110	-1.8
Milwaukee	1,531,361,643	1,727,456,597	1,533,477,285	2,115,642	0.1	-193,979,312	-11.2
Ozaukee	83,153,101	106,747,259	94,756,926	11,603,825	14.0	-11,990,333	-11.2
Racine	229,304,769	245,827,233	217,987,848	-11,316,921	-4.9	-27,839,385	-11.3
Walworth	385,814,845	416,962,009	370,505,186	-15,309,659	-4.0	-46,456,823	-11.1
Washington	121,122,750	145,275,906	131,182,850	10,060,100	8.3	-14,093,056	-9.7
Waukesha	563,078,897	683,310,671	580,494,458	17,415,561	3.1	-102,816,213	-15.0

Source: Wisconsin Department of Tourism and SEWRPC.

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Figure III-1

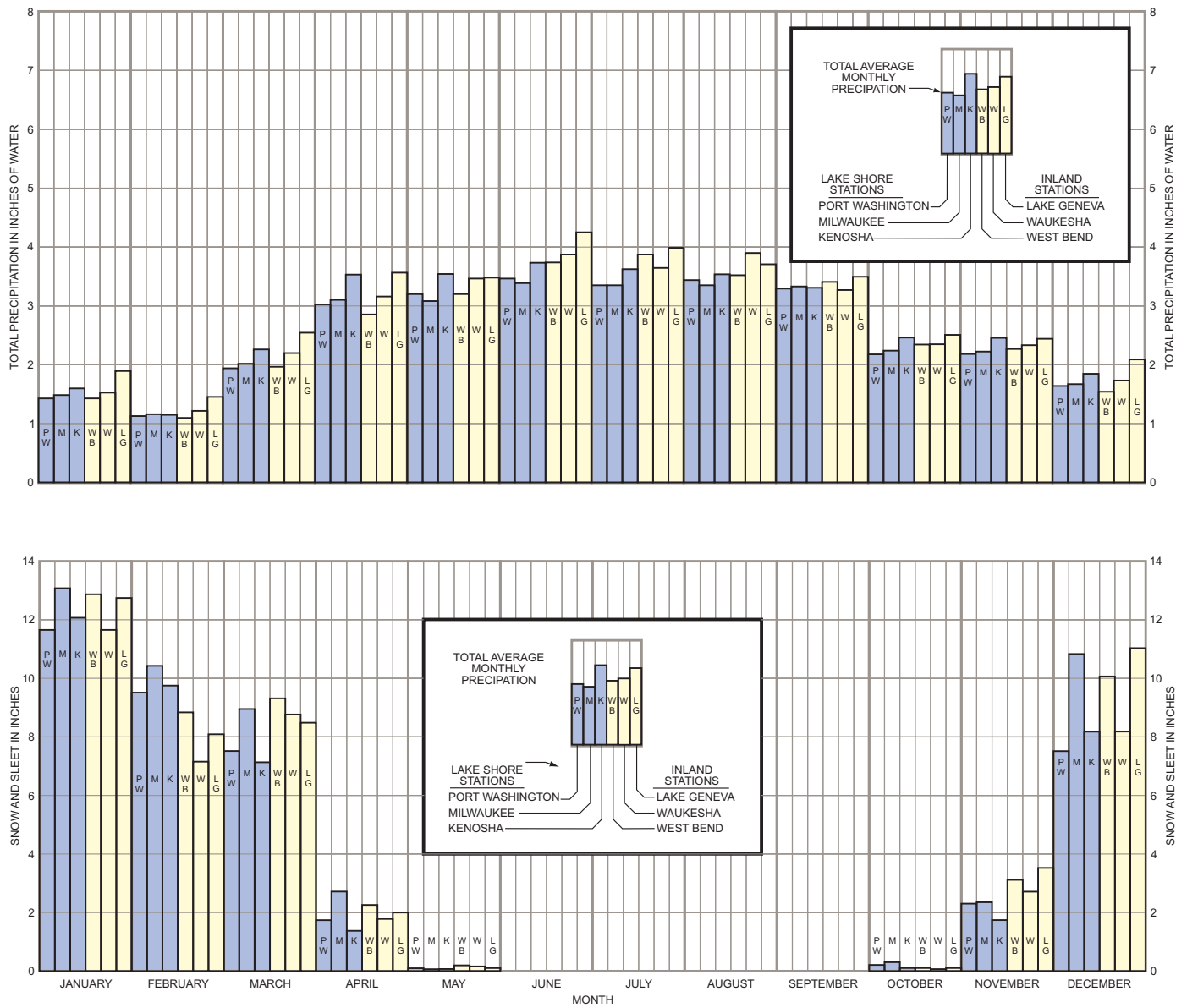
TEMPERATURE CHARACTERISTICS AT SELECTED LOCATIONS IN THE SOUTHEASTERN WISCONSIN REGION



Source: National Climatic Data Center and SEWRPC.

Figure III-2

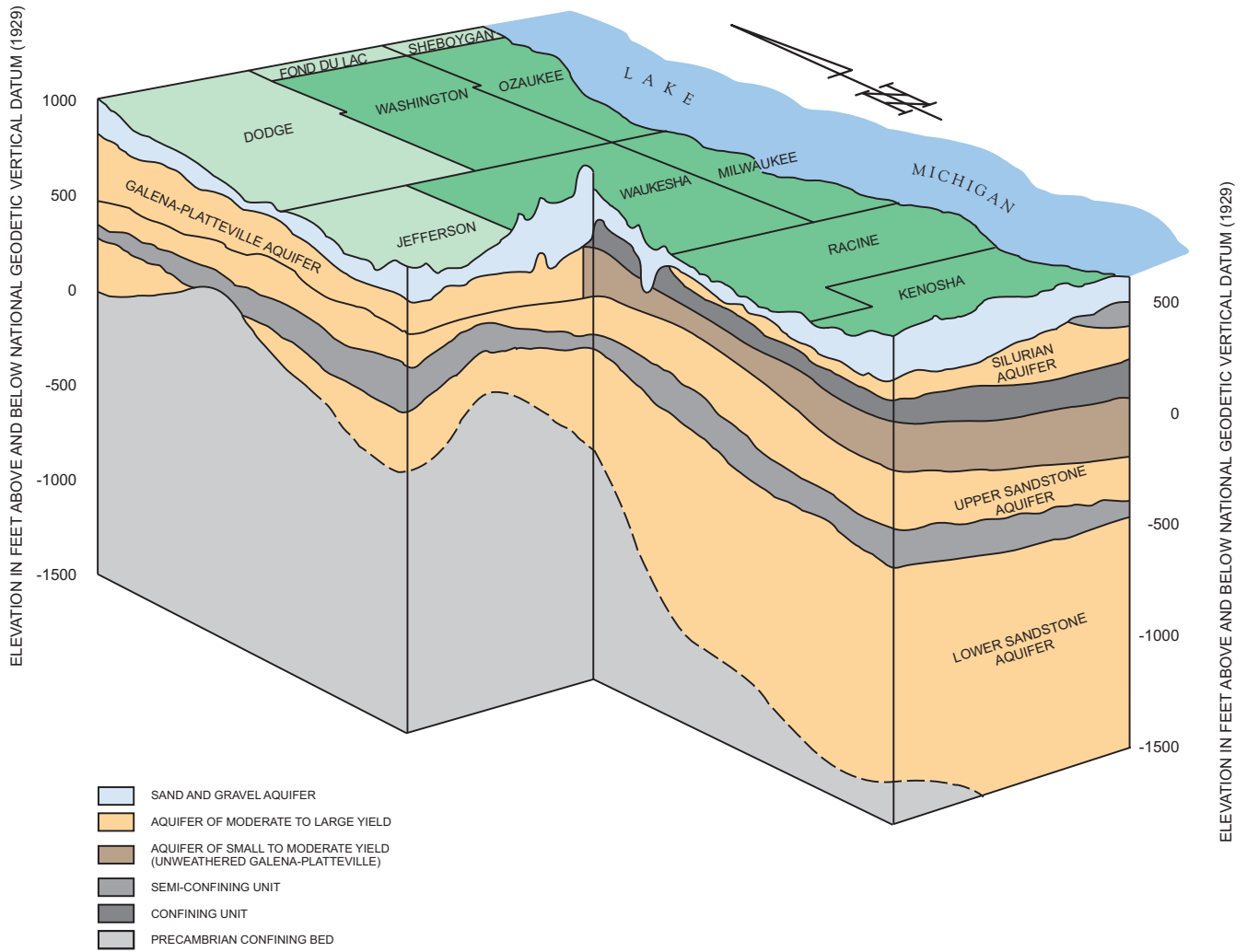
PRECIPITATION CHARACTERISTICS AT SELECTED LOCATIONS IN THE SOUTHEASTERN WISCONSIN REGION



Source: Wisconsin Statistical Reporting Service, National Climatic Data Center, and SEWRPC.

Figure III-3

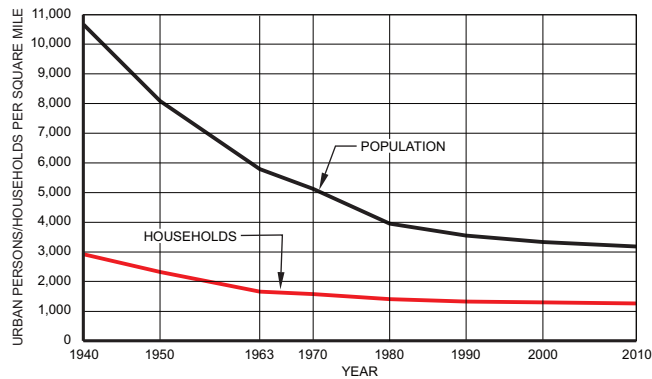
AQUIFER SYSTEMS IN SOUTHEASTERN WISCONSIN



Source: SEWRPC.

Figure III-4

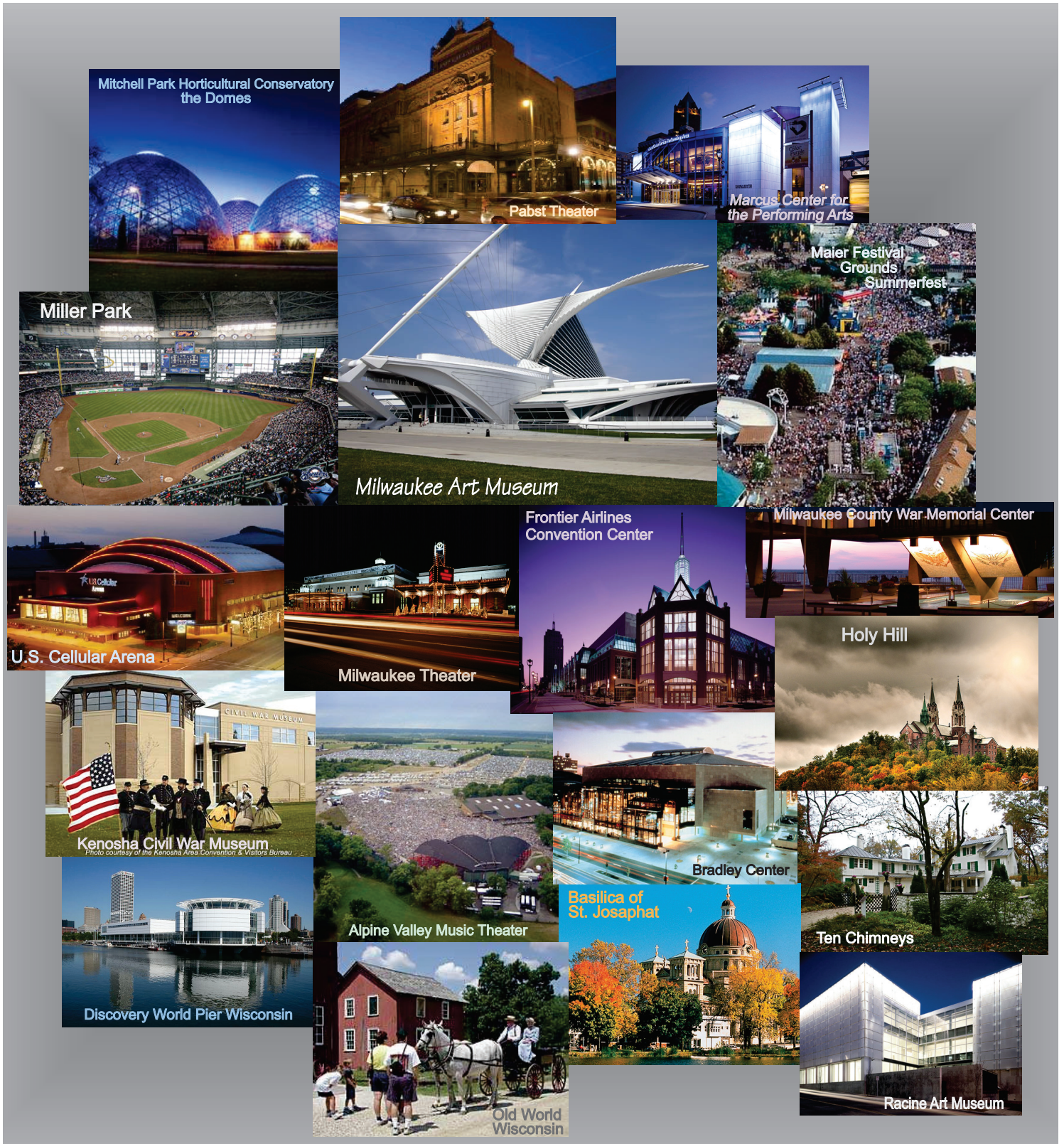
URBAN POPULATION AND HOUSEHOLD DENSITY IN THE REGION: 1940-2010



Source: U.S. Bureau of the Census and SEWRPC.

Figure III-5

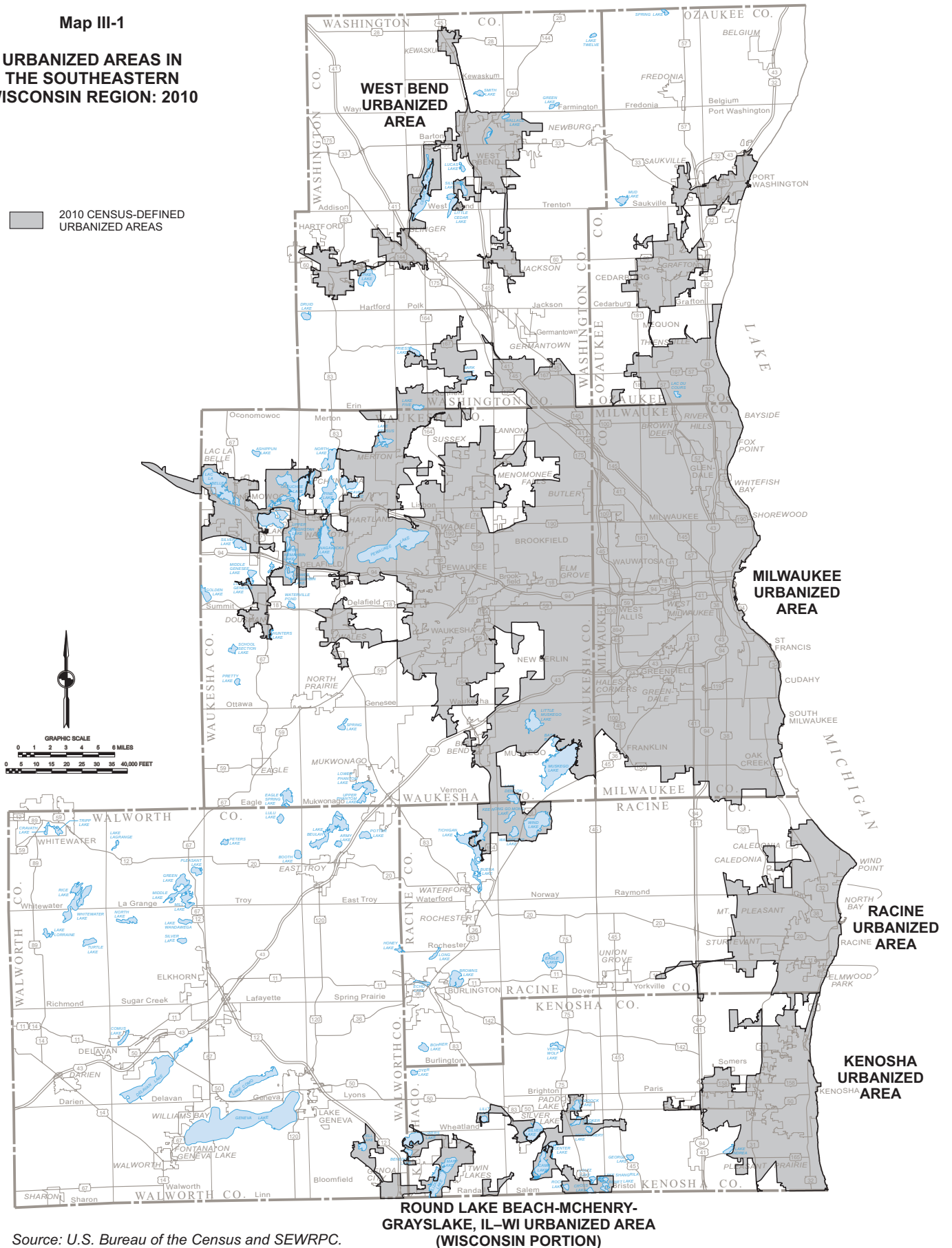
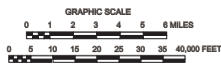
SELECTED CULTURAL VENUES IN THE SOUTHEASTERN WISCONSIN REGION



Map III-1

**URBANIZED AREAS IN
THE SOUTHEASTERN
WISCONSIN REGION: 2010**




2010 CENSUS-DEFINED
URBANIZED AREAS

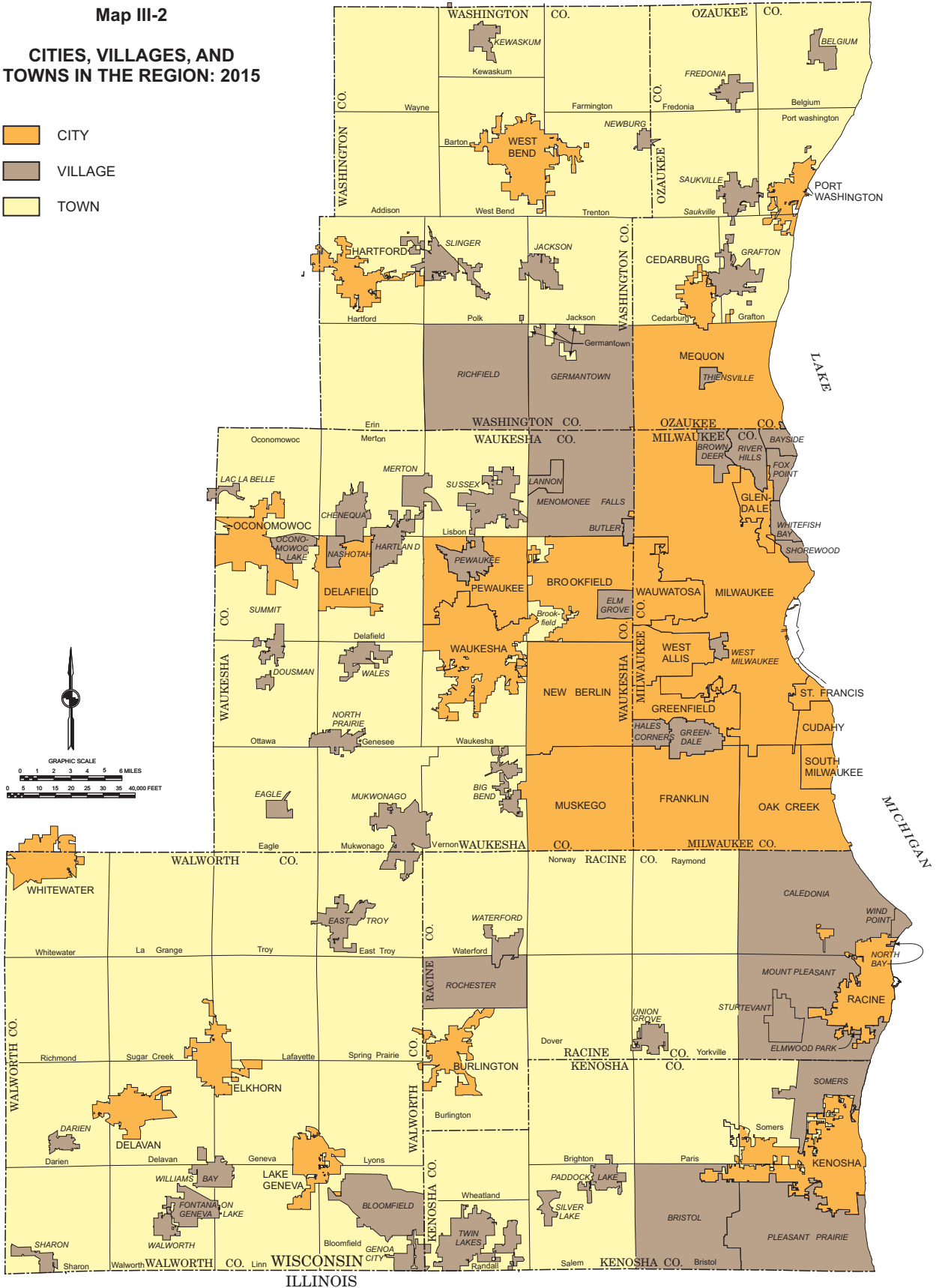


Source: U.S. Bureau of the Census and SEWRPC.

Map III-2

CITIES, VILLAGES, AND TOWNS IN THE REGION: 2015

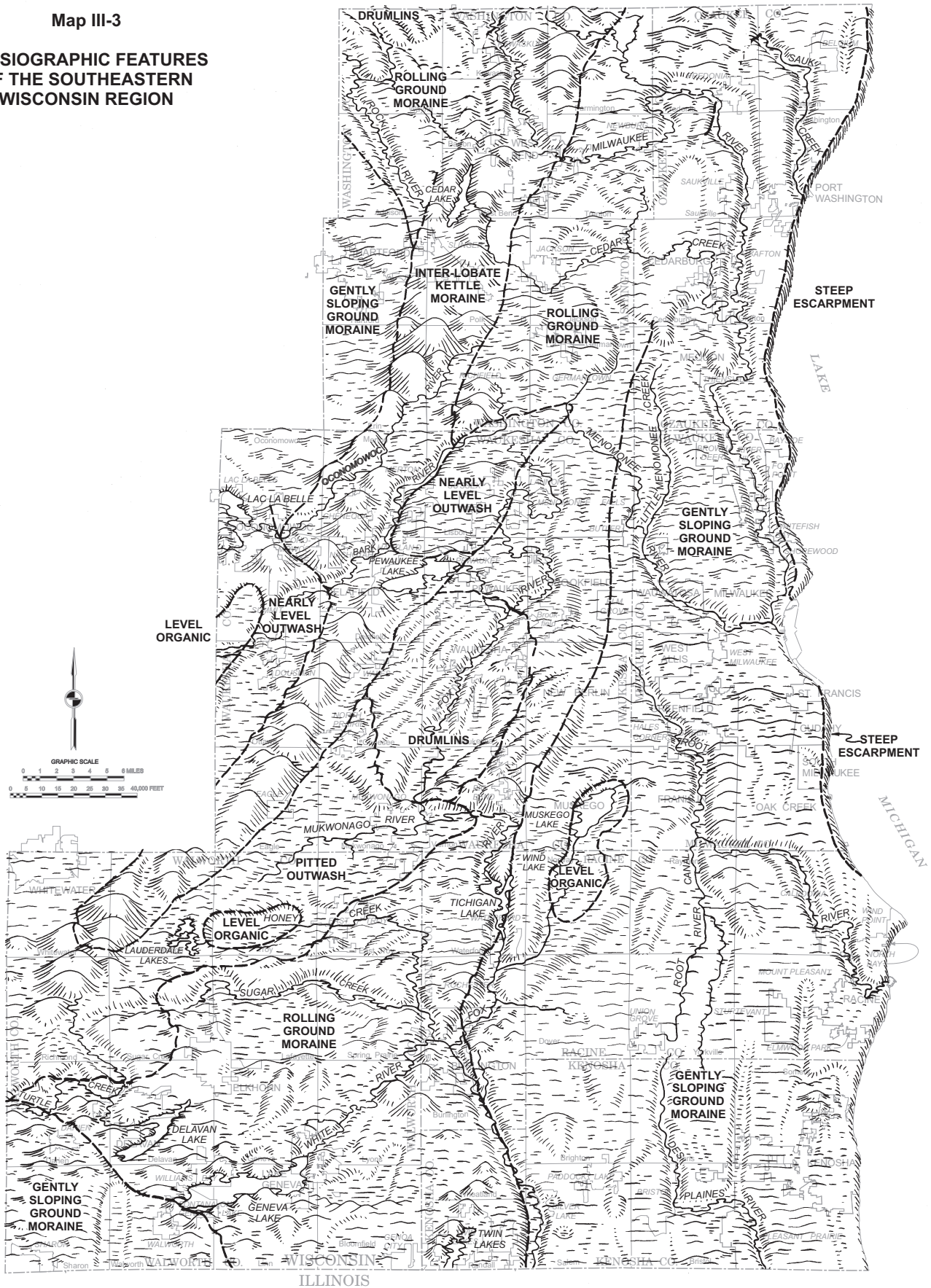
-  CITY
-  VILLAGE
-  TOWN



Source: SEWRPC.

Map III-3

**PHYSIOGRAPHIC FEATURES
OF THE SOUTHEASTERN
WISCONSIN REGION**



Source: SEWRPC.

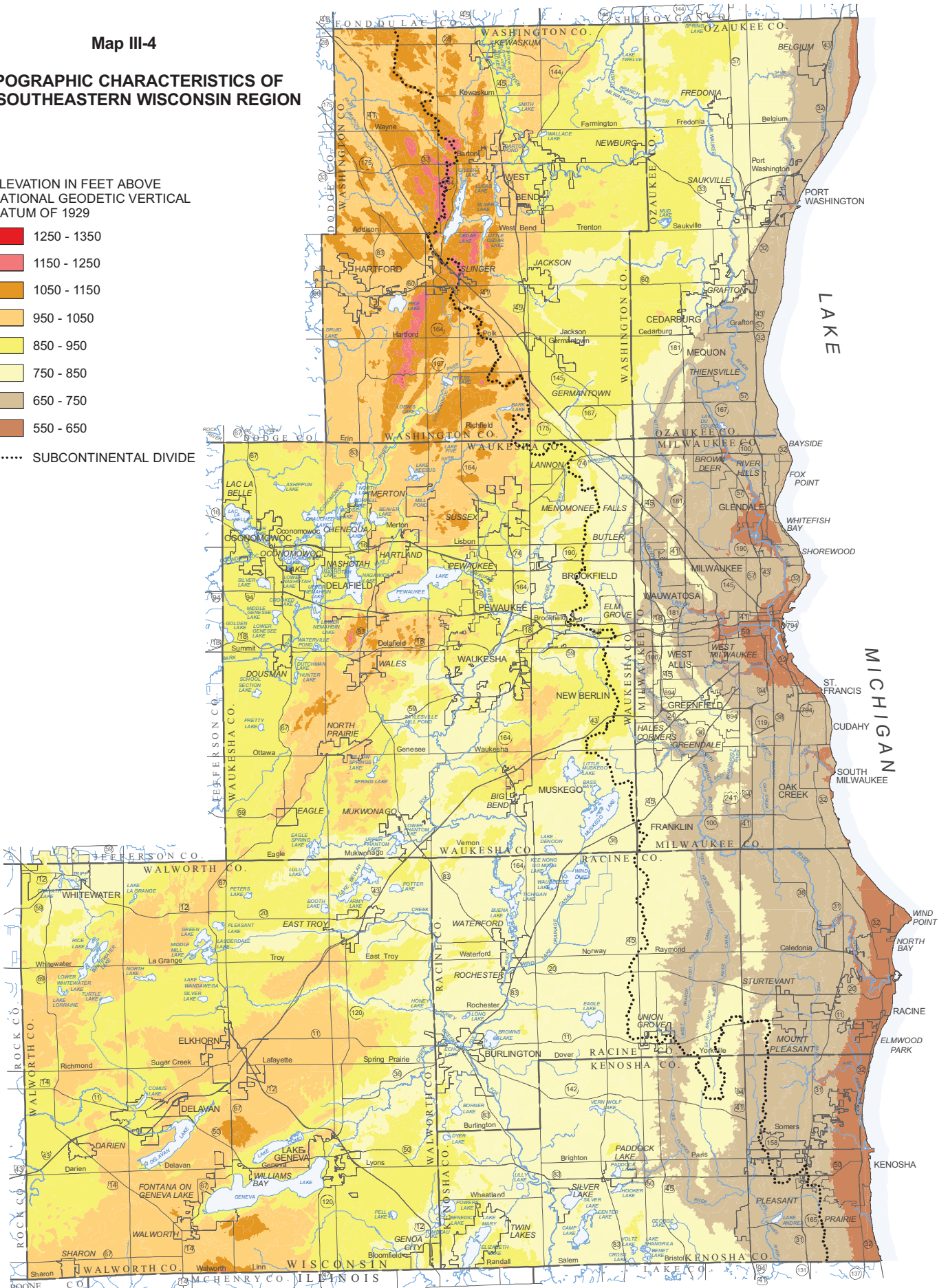
Map III-4

TOPOGRAPHIC CHARACTERISTICS OF THE SOUTHEASTERN WISCONSIN REGION

ELEVATION IN FEET ABOVE NATIONAL GEODETIC VERTICAL DATUM OF 1929

- 1250 - 1350
- 1150 - 1250
- 1050 - 1150
- 950 - 1050
- 850 - 950
- 750 - 850
- 650 - 750
- 550 - 650

..... SUBCONTINENTAL DIVIDE

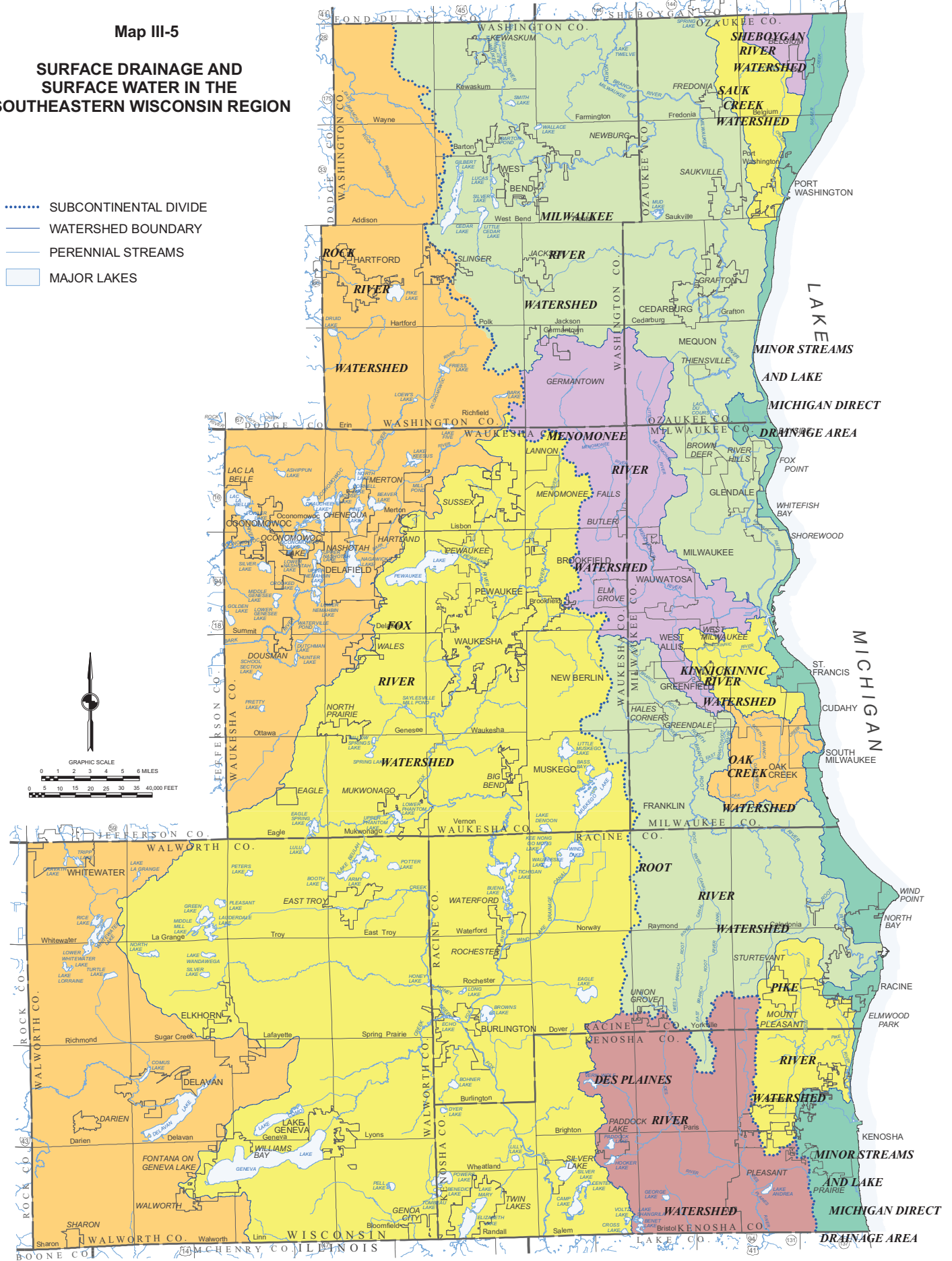
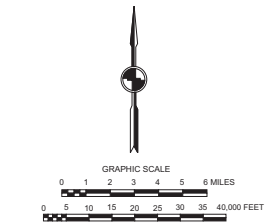


Source: SEWRPC.

Map III-5

SURFACE DRAINAGE AND SURFACE WATER IN THE SOUTHEASTERN WISCONSIN REGION





- SUBCONTINENTAL DIVIDE
- WATERSHED BOUNDARY
- PERENNIAL STREAMS
- MAJOR LAKES

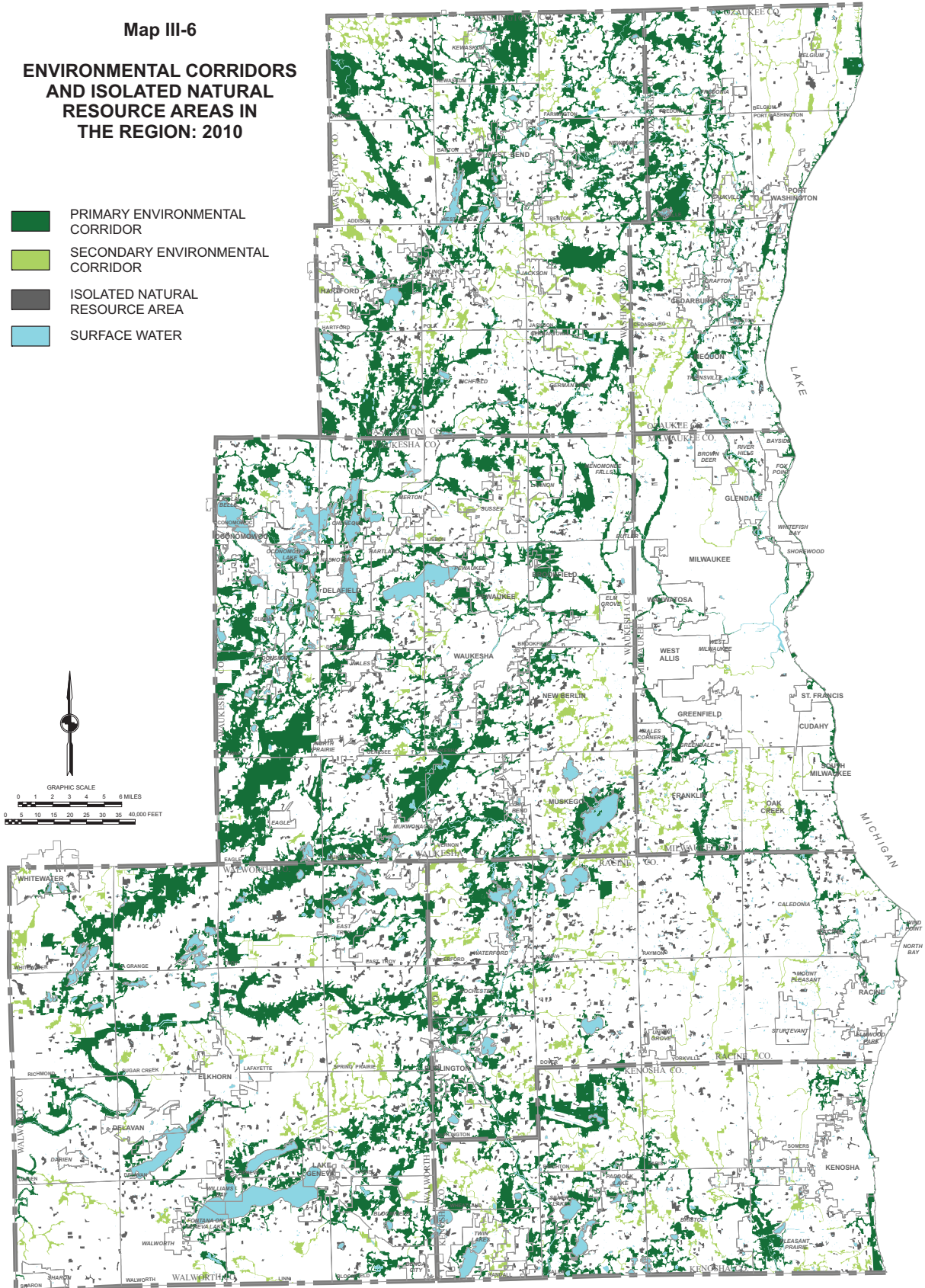


Source: SEWRPC.

Map III-6



**ENVIRONMENTAL CORRIDORS
AND ISOLATED NATURAL
RESOURCE AREAS IN
THE REGION: 2010**

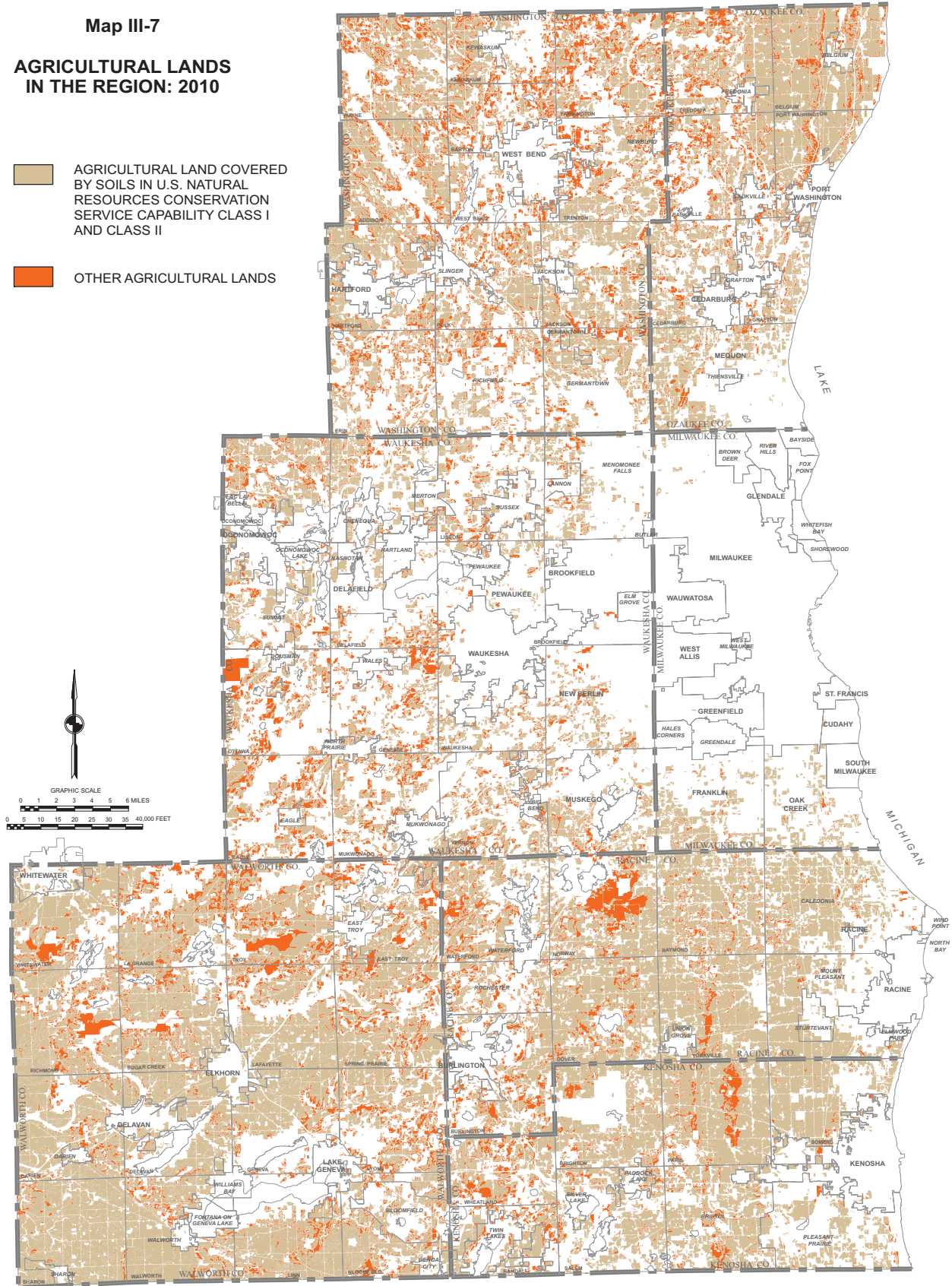
-  PRIMARY ENVIRONMENTAL CORRIDOR
-  SECONDARY ENVIRONMENTAL CORRIDOR
-  ISOLATED NATURAL RESOURCE AREA
-  SURFACE WATER



Source: SEWRPC.

Map III-7
AGRICULTURAL LANDS
IN THE REGION: 2010

-  AGRICULTURAL LAND COVERED BY SOILS IN U.S. NATURAL RESOURCES CONSERVATION SERVICE CAPABILITY CLASS I AND CLASS II
-  OTHER AGRICULTURAL LANDS

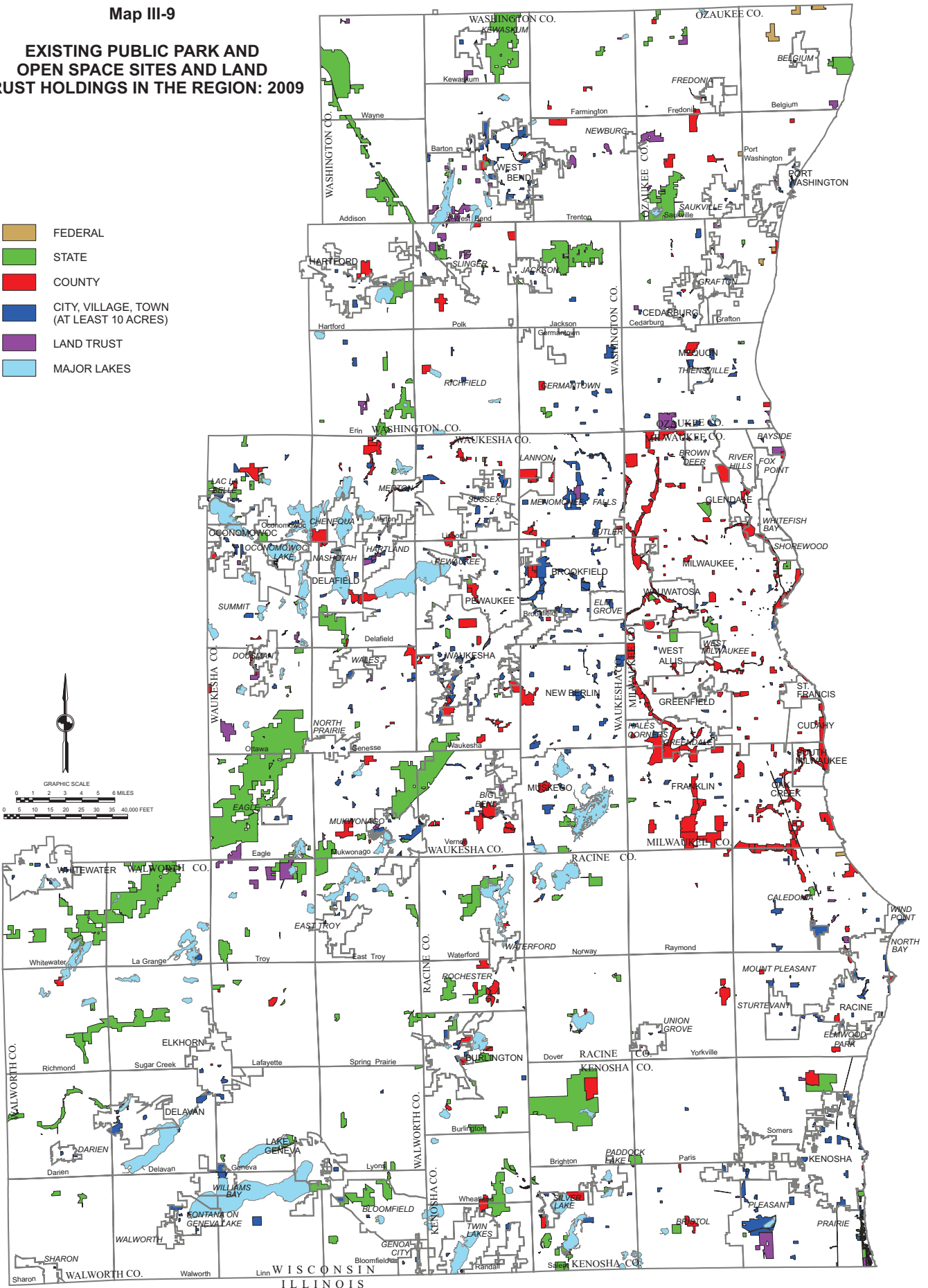
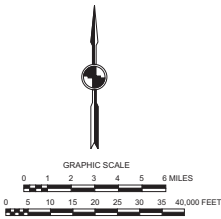


Source: U.S. Natural Resources Conservation Service and SEWRPC.

Map III-9

**EXISTING PUBLIC PARK AND
OPEN SPACE SITES AND LAND
TRUST HOLDINGS IN THE REGION: 2009**

- FEDERAL
- STATE
- COUNTY
- CITY, VILLAGE, TOWN
(AT LEAST 10 ACRES)
- LAND TRUST
- MAJOR LAKES

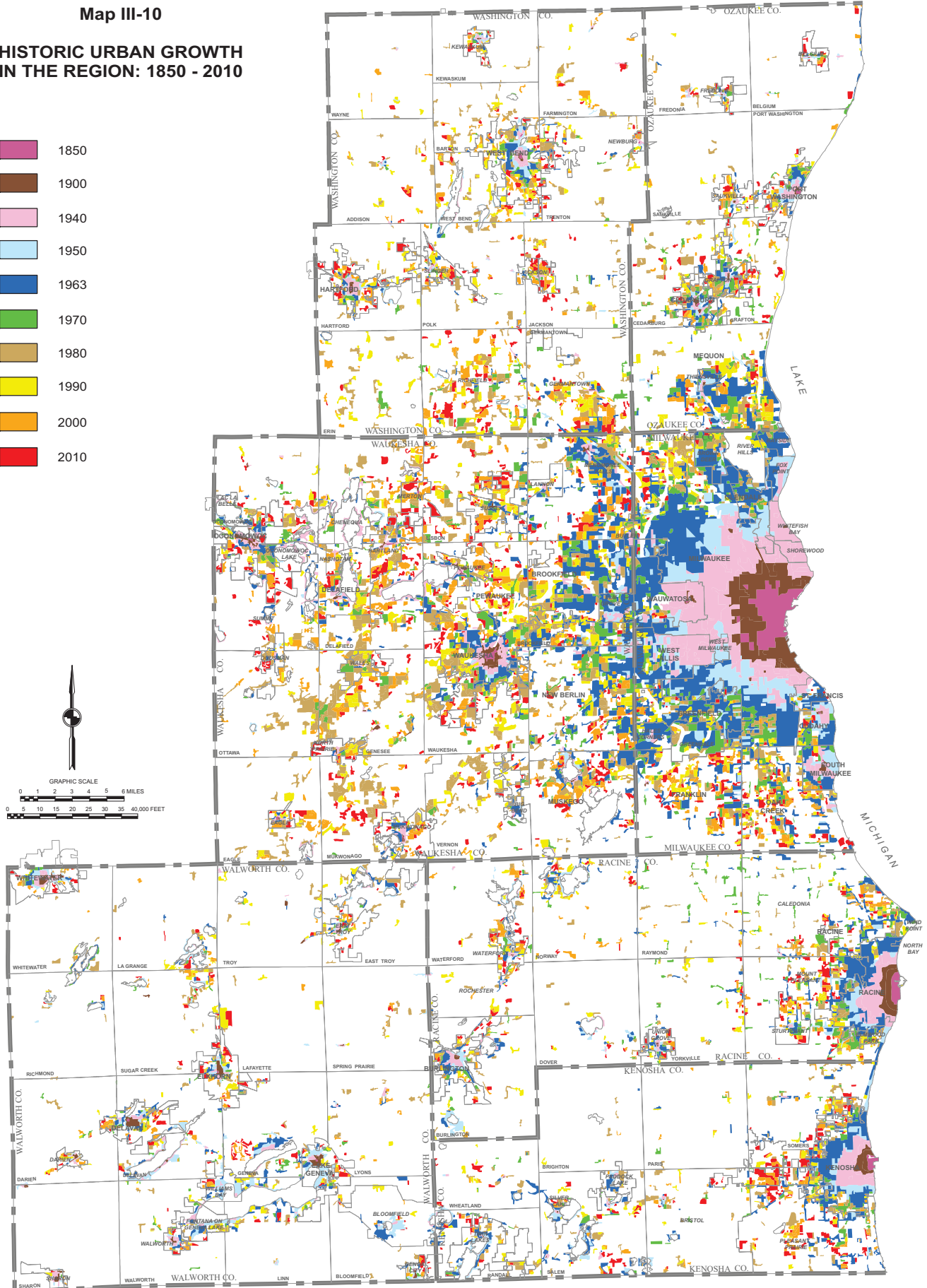
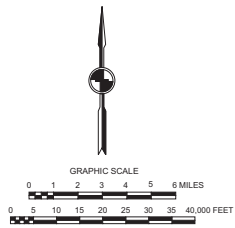


Source: SEWRPC.

Map III-10

**HISTORIC URBAN GROWTH
IN THE REGION: 1850 - 2010**

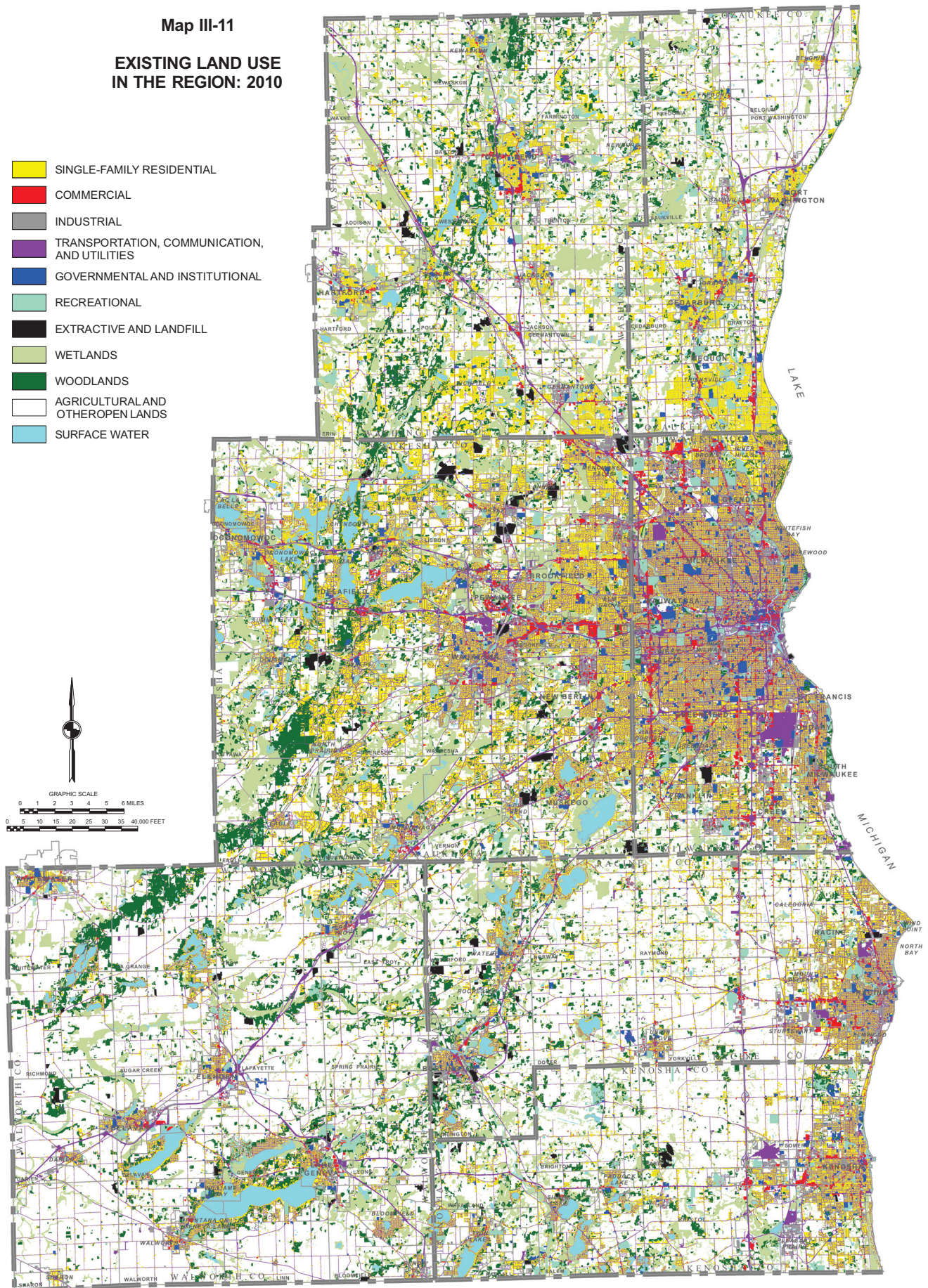
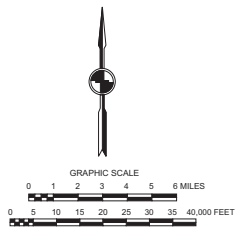
- 1850
- 1900
- 1940
- 1950
- 1963
- 1970
- 1980
- 1990
- 2000
- 2010



Source: SEWRPC.

Map III-11
EXISTING LAND USE
IN THE REGION: 2010













- SINGLE-FAMILY RESIDENTIAL
- COMMERCIAL
- INDUSTRIAL
- TRANSPORTATION, COMMUNICATION,
AND UTILITIES
- GOVERNMENTAL AND INSTITUTIONAL
- RECREATIONAL
- EXTRACTIVE AND LANDFILL
- WETLANDS
- WOODLANDS
- AGRICULTURAL AND
OTHER OPEN LANDS
- SURFACE WATER

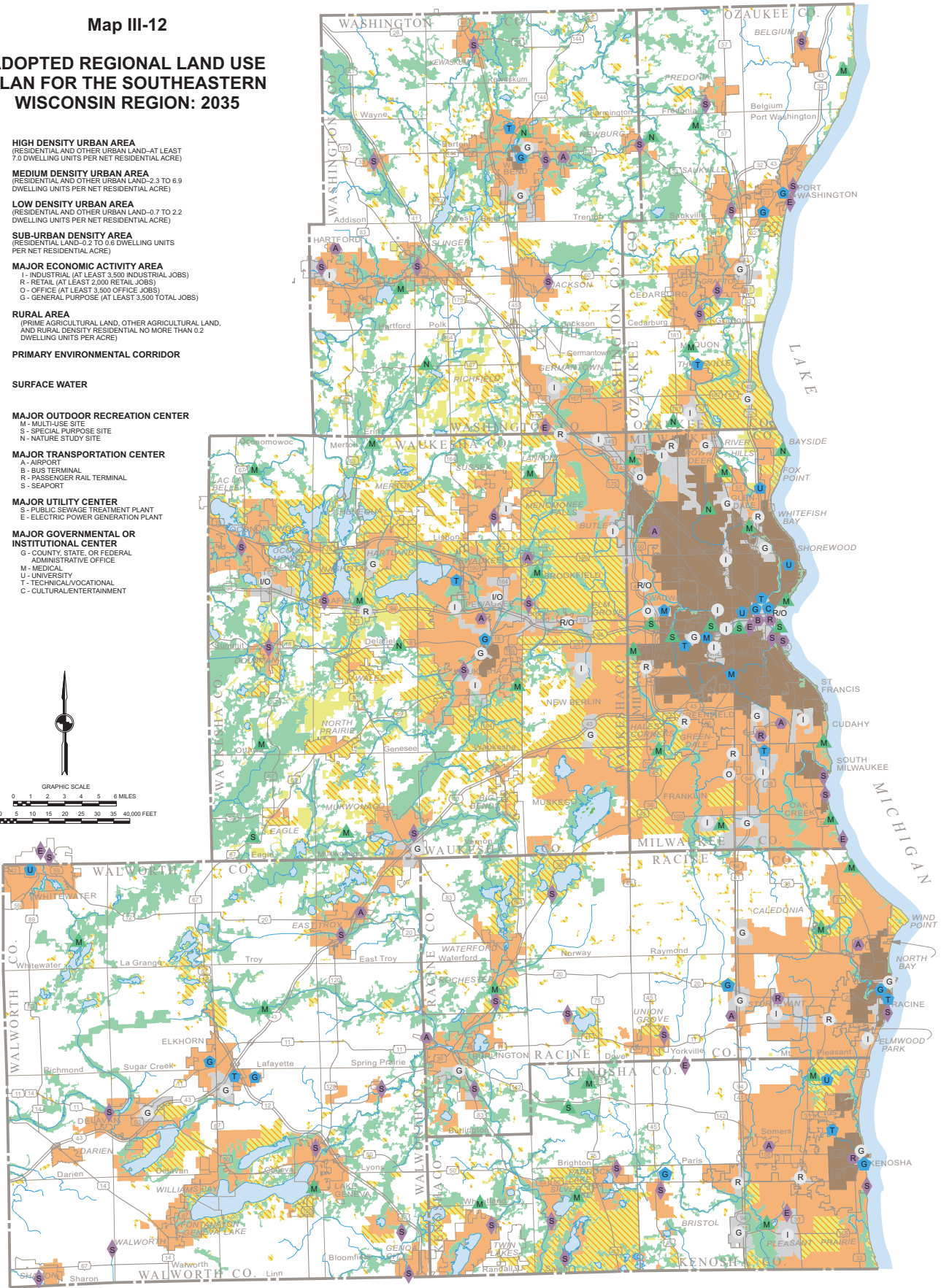
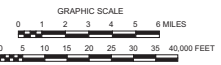


Source: SEWRPC.

Map III-12

ADOPTED REGIONAL LAND USE PLAN FOR THE SOUTHEASTERN WISCONSIN REGION: 2035

-  **HIGH DENSITY URBAN AREA**
(RESIDENTIAL AND OTHER URBAN LAND-AT LEAST 7.0 DWELLING UNITS PER NET RESIDENTIAL ACRE)
-  **MEDIUM DENSITY URBAN AREA**
(RESIDENTIAL AND OTHER URBAN LAND-2.3 TO 6.9 DWELLING UNITS PER NET RESIDENTIAL ACRE)
-  **LOW DENSITY URBAN AREA**
(RESIDENTIAL AND OTHER URBAN LAND-0.7 TO 2.2 DWELLING UNITS PER NET RESIDENTIAL ACRE)
-  **SUB-URBAN DENSITY AREA**
(RESIDENTIAL LAND-0.2 TO 0.6 DWELLING UNITS PER NET RESIDENTIAL ACRE)
-  **MAJOR ECONOMIC ACTIVITY AREA**
I - INDUSTRIAL (AT LEAST 3,500 INDUSTRIAL JOBS)
R - RETAIL (AT LEAST 2,000 RETAIL JOBS)
O - OFFICE (AT LEAST 3,500 OFFICE JOBS)
G - GENERAL PURPOSE (AT LEAST 3,500 TOTAL JOBS)
-  **RURAL AREA**
(PRIME AGRICULTURAL LAND, OTHER AGRICULTURAL LAND, AND RURAL DENSITY RESIDENTIAL NO MORE THAN 0.2 DWELLING UNITS PER ACRE)
-  **PRIMARY ENVIRONMENTAL CORRIDOR**
-  **SURFACE WATER**
-  **MAJOR OUTDOOR RECREATION CENTER**
M - MULTI-USE SITE
S - SPECIAL PURPOSE SITE
N - NATURE STUDY SITE
-  **MAJOR TRANSPORTATION CENTER**
A - AIRPORT
B - BUS TERMINAL
R - PASSENGER RAIL TERMINAL
S - SEAPORT
-  **MAJOR UTILITY CENTER**
S - PUBLIC SEWAGE TREATMENT PLANT
E - ELECTRIC POWER GENERATION PLANT
-  **MAJOR GOVERNMENTAL OR INSTITUTIONAL CENTER**
G - COUNTY, STATE, OR FEDERAL ADMINISTRATIVE OFFICE
M - MEDICAL
U - UNIVERSITY
T - TECHNICAL/VOCATIONAL
C - CULTURAL/ENTERTAINMENT



Source: SEWRPC.

**COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY
FOR SOUTHEASTERN WISCONSIN: 2015 - 2020**

Chapter IV

REGIONAL INFRASTRUCTURE

INTRODUCTION

Community infrastructure is vitally important to the economic health and vitality of any area. In this context, infrastructure includes the key transportation and utility facilities and services that are critical for the day-to-day functioning of a regional economy, as well as a region's educational institutions and its critical community services, including public safety, hospitals, and libraries. Accordingly, this chapter briefly describes these key infrastructure components in the Southeastern Wisconsin Region, including, where appropriate in the context of economic development, observations on major issues and challenges that are being faced in maintaining and strengthening these components. Taken together, these key infrastructure components help define both the quality of life in southeastern Wisconsin and its economic competitiveness with other regions.

TRANSPORTATION

Arterial Streets and Highways

Arterial streets are defined as streets and highways which are principally intended to provide a high degree of travel mobility, serving the through movement of traffic and providing transportation service between major subareas of an urban area or through the area. Together, the arterial streets should form an integrated, areawide system. Access to abutting property may be a secondary function of some types of arterial streets and highways, but it should always be subordinate to the primary function of traffic movement.

Arterial streets generally account for only about 30 percent of the mileage of the total street and highway system, but carry about 90 percent of the total average weekday traffic in the Region. As such, they are a critical transportation infrastructure component in the context of economic development, providing the basis for not only most employee travel, but also for most of the movement of raw materials and supplies and of finished products in the manufacturing sector of the Region's economy.

The arterial street system may be divided into freeway facilities and nonfreeway, or standard arterial, streets and highways. A freeway is a special type of arterial—the highest type of arterial—providing the highest degree of mobility and the most limited degree of access. A freeway is defined as a divided arterial highway with full control of access and grade separations at all interchanges. Standard arterial streets and highways are arterials with at-grade intersections and may as well provide direct access to abutting property through driveways.

Streets and highways may also be classified according to jurisdiction. Jurisdictional classification establishes which level of government—State, county, or local—has responsibility for the design, construction, maintenance, and operation of each segment of the total street and highway system. State trunk highways are those arterial

facilities which principally serve travel through a county, and travel between counties. Table IV-1 presents the distribution of existing arterial highway mileage within the Region in 2009 by State, county, and local jurisdictional classification. As is shown in the table, the arterial street and highway system in the Southeastern Wisconsin Region totals 3,557.6 route-miles. This network of arterial facilities, with jurisdictional responsibility identified, is shown on Map IV-1. The State trunk highway system for the Region in 2009, shown as red lines on Map IV-1, consists of 1,248.8 route-miles, including both freeways and standard arterials. County trunk highways principally serve travel between the various municipalities of a county. The County trunk highway system for the Region in 2009, shown as blue lines on Map IV-1, consists of 1,241.6 route-miles. These County trunk highways only represent those which have been functionally classified as arterial facilities in the adopted year 2035 regional transportation plan. Local or municipal arterial streets principally serve arterial travel within a municipality. The local arterial street system for the Region in 2009, shown as green lines on Map IV-1, consists of 1,067.2 route-miles.

Table IV-2 presents the average weekday vehicle-miles of travel in the Region in 2005. The table shows that while freeways in the Region comprise a total of about 269 miles, representing only about eight percent of the total arterial street and highway system, those freeway facilities carry about 38 percent of the over 42 million vehicle-miles of travel daily on the arterial system.

Traffic congestion is principally measured by the level of peak traffic hour average weekday recurring traffic congestion on each segment of the arterial street and highway system in the Region. As shown in Table IV-3, congestion is categorized as moderate, severe, or extreme with each level described by travel speed, operating conditions, and level of service.

Table IV-4 shows the traffic congestion on the arterial street and highway system in the Region in 2005. A much greater proportion of the freeway system—as compared to the surface arterial street system—experiences severe and extreme peak hour traffic congestion, and experiences traffic congestion during hours of the weekday other than the peak traffic hours. About one-fourth of the Region’s freeway miles experience some degree of congestion on an average weekday, including severe or extreme congestion on about 20 percent of the Region’s freeway miles. By comparison, only about eight percent of the Region’s surface arterial street and highway miles experience any degree of congestion, with severe or extreme congestion on only about two percent of that portion of the system. The most congested freeways are found in Milwaukee County, where nearly three-fourths of the County’s freeway miles experience some degree of congestion on an average weekday, including severe or extreme congestion on about 65 percent of the County’s freeway miles. Conversely, freeways in Kenosha, Ozaukee, Racine, Walworth, and Washington Counties experience little or no congestion on an average weekday.

The major challenges being faced in terms of the Region’s arterial street and highway system lie in the maintenance, improvement, and necessary rebuilding of that system. The most important and most costly system rebuilding projects are the responsibility of the Wisconsin Department of Transportation (WisDOT) on the Region’s freeway network. WisDOT is proceeding to implement the freeway reconstruction recommendations made in the regional transportation plan for southeastern Wisconsin.¹ Progress is being made by WisDOT in implementing that plan. Major reconstruction projects that are completed, currently underway, or scheduled for completion include:

- Marquette Interchange: completed in 2008.
- Mitchell Interchange: completed in 2012.
- Zoo Interchange: currently underway and scheduled to be completed by the end of 2018.

¹See *SEWRPC Planning Report No. 49, A Regional Transportation System Plan for Southeastern Wisconsin: 2035, June 2006*. An update to the plan, referred to as “VISION 2050,” is anticipated be completed in late 2015.

- I-94 North-South Corridor between the Mitchell Interchange and the Illinois state line: currently underway and scheduled to be completed in 2021.
- I-94 East-West Corridor between 70th Street and 25th Street: planning underway.
- I-43 North-South Corridor between Silver Spring Drive and STH 60: planning underway.

The entire freeway system in the Region was largely completed by the early 1970's and for the most part has a service life ranging from 50 to 60 years. While progress has been made, the reconstruction of the remaining segments of the freeway system will likely need to be accomplished over the next 20 to 30 years. In addition, continued reinvestment in surface arterial street and highway infrastructure will be needed in the long-term by WisDOT and the counties and municipalities in which this infrastructure is located.

Transit

Public transit facilities and services represent a second critical transportation infrastructure component in the context of economic development. Public transit may be defined as the transportation of people by publicly operated vehicles between trip origins and destinations. Urban and rural fixed-route public transit services provided within the Region in 2011 are shown on Map IV-2. Map IV-2 shows the two different types of fixed-route public transit service provided in 2011—local transit service (shown as green lines) and rapid transit service (shown as red lines). Commuter rail service, a specific type of rapid transit service, is depicted as an orange line on the map.

Public transportation may be divided into service provided for the general public and service provided to special population groups. Examples of special group public transportation include yellow school bus service operated by area school districts, and fixed-route bus and paratransit van service provided by counties or municipalities for the elderly and disabled. Public transit service to the general public may further be divided into three categories: intercity, rural, and urban. Intercity or interregional public transportation provides service across regional boundaries and includes Amtrak railway passenger service, interregional bus service, and commercial air travel. Rural—and small urban community—public transportation provides service in and between small urban communities and rural areas, and may provide connections to urban areas. In southeastern Wisconsin, rural—and small urban community—transit service is provided by nonfixed-route shared-ride taxi systems operated by Ozaukee and Washington Counties, and the Cities of Hartford, Port Washington, West Bend, and Whitewater. Kenosha County also provides rural fixed-route transit service in the western portion of Kenosha County.

Urban public transportation, commonly referred to as public transit, provides service within and between the large urban areas of the Region. Public transit is essential in any metropolitan area to meet the travel needs of persons unable to use personal automobile transportation; to provide an alternative mode of travel, particularly in heavily traveled corridors within and between urban areas and in densely developed urban communities and activity centers; and to provide choice in transportation modes as an enhancement of quality of life and to support and enhance the Region's economy. Urban public transit in the Region is provided by urban fixed-route bus transit systems operated by Ozaukee, Milwaukee, Washington, and Waukesha Counties and the Cities of Kenosha, Racine, and Waukesha, as well as commuter rail service between the City of Kenosha and northeastern Illinois provided by Metra. Select characteristics of these urban transit systems in 2010 are shown in Table IV-5.

The largest transit system in the Region is operated by Milwaukee County, which has operated the publicly subsidized public transit system since 1975 when the private sector operator sold its assets to the County. Key data attendant to the operations of the Milwaukee County Transit System in 2010 are set forth in Figure IV-1. Milwaukee County operates both commuter-oriented Freeway Flyer routes focused on tripmaking to and from the Milwaukee downtown area, and a relatively dense network of local service routes throughout much of the area of the County. As previously noted, Milwaukee County also implemented three new express bus routes in early 2012.

The major challenge relative to the operations of the local transit systems in the Region—in particular the Milwaukee County Transit System—relates to funding, and more specifically the lack of a local dedicated funding source, typically a dedicated sales tax. The local share of funding of public transit in the Region is provided through county or municipal budgets, and represents about 15 percent of the total operating costs and 20 percent of total capital costs of public transit. Thus, the local share of funding public transit is largely provided by property taxes, and public transit must annually compete with mandated services and projects. Increasingly, due to the constraints in property tax-based funding, counties and municipalities have found it difficult to provide funding to address transit needs, and to respond to shortfalls in Federal and State funding. As a result of these financial constraints, the annual bus service miles and ridership of the Region’s urban transit systems have declined since 2000, illustrated in Figure IV-2. Most public transit systems nationwide have dedicated local funding—typically a sales tax of 0.25 to 1.0 percent—and are not nearly as dependent upon Federal and State funding. A sales tax provides funding which should increase with inflation and area growth, thereby addressing funding needs attendant to inflation in the costs of providing public transit and transit system expansion.

A second major transit challenge relative to jobs and economic development relates to the jurisdictional limits of the local transit systems within the Region. Viewed broadly, the Region lacks a robust mass transit system to enable residents who are seeking jobs to travel by transit to jobs in adjoining counties. Attempts to address this major issue through intergovernmental funding and service agreements between adjacent counties have not led to any significant bi-directional cross county boundary route structures. Similarly, attempts to provide for a regional transit authority with funding and/or operational responsibilities have been consistently rebuffed at the State level.

Airports

Another critical transportation infrastructure component in the context of economic development relates to airport and air carrier passenger services. Map IV-3 displays all airports in the Region that were included as part of the adopted regional airport system plan, described in SEWRPC Planning Report No. 38 (2nd Edition), *A Regional Airport System Plan for Southeastern Wisconsin: 2010*, November 1996.

Milwaukee County owns and operates southeastern Wisconsin’s only air carrier airport—General Mitchell International Airport (GMIA). Key data attendant to the operations of GMIA are set forth in Figure IV-3. In total, 9 carriers provide passenger service out of GMIA, with the airport also served by two air freight services. In 2010, total aircraft operations at GMIA totaled about 191,600, with about 9,848,000 air carrier enplaning and deplaning passengers. Air carrier activity at GMIA measured in terms of enplaning and deplaning passengers has nearly doubled since 1995, a very robust rate of growth. From an economic development perspective, GMIA represents an important asset that at the present time is not experiencing any significant current challenges. Airport master planning indicates that longer term future passenger and air carrier operations growth may be expected to require major passenger terminal expansion and construction of a parallel east-west runway.

At all of the public airports other than GMIA, the level of aviation activity can be measured in terms of general aviation aircraft operations—in other words, takeoffs and landings—which account for almost all activity. At Waukesha County-Crites Field, there were about 58,800 total operations during 2010. At Kenosha Regional Airport, there were about 52,500 total operations during 2010. At Lawrence J. Timmerman Airport, there were about 32,600 total operations during 2010. At GMIA, where general aviation accounts for only a small portion of all activity, there were about 15,000 general aviation operations reported for 2010.

Railroads

Rail freight service is provided within southeastern Wisconsin over a total of about 492 miles of active main line as shown on Map IV-4. The major carriers are the Canadian National Railway, the Canadian Pacific Railway, the Union Pacific Railroad, and the Wisconsin & Southern Railroad Company. Together these private sector railway facilities, which interconnect with the Port of Milwaukee, constitute another important transportation infrastructure component in relation to economic development activities.

Intercity passenger train service in the Region is provided by Amtrak between Chicago and Minneapolis-St. Paul over Canadian Pacific Railway trackage, with stops in southeastern Wisconsin at Milwaukee, General Mitchell

International Airport, and Sturtevant. Commuter rail service is provided between Kenosha and Chicago, with intermediate stops throughout the north shore suburbs of northeastern Illinois, by the Union Pacific Railroad under an agreement with Metra, the commuter rail division of the Regional Transportation Authority in northeastern Illinois.

Water Transportation

Operated by the Board of Harbor Commissioners of the City of Milwaukee, the Port of Milwaukee is a major transportation terminal and has the largest intermodal sea container yard in the State of Wisconsin. As such, the Port of Milwaukee is another important transportation infrastructure component in the context of economic development. Key data attendant to Port of Milwaukee operations are set forth in Figure IV-4. The Port of Milwaukee handles a diverse mix of cargo, including large mining machinery manufactured in the Region.

In terms of passenger water transportation, the Lake Express Car Ferry provides high-speed automobile and passenger ferry service across Lake Michigan between Milwaukee and Muskegon, Michigan. The Lake Express began service on June 1, 2004, with its Milwaukee terminal located on leased Port of Milwaukee property. The Lake Express has a capacity of 46 vehicles and 12 motorcycles for each trip.

UTILITIES

Public Water Supply

In 2010, 78 municipal water supply utility systems provided water to about 444 square miles of service area, or about 16.5 percent of the area of the Southeastern Wisconsin Region. These systems served a population of about 1.68 million persons, or about 83 percent of the Region's population. Forty-eight of the water supply systems rely on groundwater as a source of supply. Twenty-eight of the water supply systems rely on Lake Michigan as the source of supply, which is provided by nine water treatment plants with 16 intakes. Two of the systems use both groundwater and surface water in different portions of their service area. The existing service areas of municipal water utilities serving the Region are shown on Map IV-5 and the area and population served by municipal systems are presented in Table IV-6.

Approximately 257 million gallons per day (mgd) of water were pumped for use in the 78 municipal systems concerned in 2005. Water use totaled about 193 mgd for residential, commercial, industrial, institutional, or other urban uses, with the remaining 64 mgd of total pumpage being used for purposes such as water production and system maintenance, or being unaccounted-for water. Overall, about 90 mgd, or about 47 percent of total municipal water used, was for single- and two-family housing units residential purposes; about 51 mgd, or about 26 percent, for commercial, multi-family residential, and institutional uses; and about 40 mgd, or about 21 percent, was for industrial uses. The remaining about 12 mgd, or about 6 percent, was used for other municipal purposes. Based upon the population served and reported water use, residential water consumption within the 78 water supply systems was approximately 70 gallons per person per day in 2005. When accounting for all municipal water uses, the average water consumption was about 120 gallons per person per day.

Challenges related to water supply relate primarily to ensuring that the capacity, quality, and sustainability of the existing water supply infrastructure are adequate to meet future water supply demands. A particular issue that will need to be addressed is whether to extend the Lake Michigan water supply to select communities east and west of the subcontinental divide, including the City of Waukesha.

Sanitary Sewerage

Areas served by public sanitary sewers within the Region in 2010 encompassed about 525 square miles, or about 20 percent of the total area of the Region—compared to about 477 square miles, or about 18 percent of the total area of the Region in 2000 (see Map IV-6 and Table IV-7). An estimated 1.80 million persons, or 89 percent the Region's residents, were served by public sanitary sewers in 2010, compared to 1.71 million persons, representing 88.7 percent of the regional population, in 2000.

The increase in the land area and population served by public sanitary sewers primarily reflects new development designed to be served by sanitary sewers that occurred during the 2000s. Some of the increase is also the result of the retrofitting of certain developed areas—initially served by private onsite wastewater treatment systems—with public sanitary sewers. Examples of such retrofitting efforts include the extension of sanitary sewer service to developed areas around Upper and Lower Nashotah Lakes, Upper and Lower Nemahbin Lakes, and Silver Lake in Waukesha County.

Under State administrative rules, sanitary sewers may be extended only to areas located within planned sanitary sewer service areas as identified in local sanitary sewer service area plans adopted as part of the regional water quality management plan, which is in turn based upon the regional land use plan. Such plans may be amended in response to changing local conditions and needs as well as in response to new population projections, subject to the provisions of Wisconsin Administrative Code Chapter NR 121. Currently adopted sanitary sewer service areas in the Region are shown on Map IV-7.

The Milwaukee Metropolitan Sewerage District (MMSD) provides sewage treatment services for 28 municipalities in the Region. Treatment and disposal is handled at two major Lake Michigan shoreline-based treatment plants. MMSD maintains a network of major trunk and intercepting sewers and inline storage facilities (deep tunnels) that collect and convey sewage and attendant wastewater from throughout its service area. The sewerage system challenges that remain to be met in the MMSD service area relate largely to dealing with clear water inflow and infiltration during very extreme storm events.

Electric Power and Natural Gas

Electric power and natural gas services are available on demand throughout most of the Region. Natural gas service in the Region is provided by We Energies, Inc. Electric power is also provided throughout most of the Region by We Energies, Inc. Alliant Energy provides electric power service in the southern portion of Walworth County and southeastern portion of Kenosha County. In addition, municipal electric utilities serve the Cedarburg, Elkhorn, Hartford, Oconomowoc, and Slinger areas. The Region's energy rates are believed to be reasonable compared to other metropolitan areas. From an economic development standpoint, no significant problems can be cited relative to the availability, reliability, and cost of energy as presently being supplied by We Energies, Alliant Energy, and the municipal electric utilities.

Telecommunications

Broadband telecommunications infrastructure is an important consideration in the context of economic development activities. Within the Region, both landline and wireless broadband telecommunications facilities and service are provided entirely in the private sector, although the City of Milwaukee provides its own telecommunications networks for public purposes. Landline-based broadband services in the Region are provided by three major companies—Charter, Time Warner, and AT&T. Mobile broadband services are made available in the Region by AT&T, Verizon, and a number of other wireless carriers. In general, from an economic development standpoint, these private companies maintain a posture of being able to adequately and reliably serve the broadband needs of any commercial enterprise.

EDUCATIONAL INFRASTRUCTURE

Primary and Secondary Education

The Region is served by all or parts of 56 union high school and K-12 districts, the largest of these being the Milwaukee Public School System, which serves the City of Milwaukee. Each of the union high school districts has one or more feeder elementary school districts. Total public school enrollment, including enrollment in charter schools, stood at about 326,500 pupils in the 2010-2011 school year, or about 83 percent of total elementary and secondary enrollment. In addition to public schools, the Region is served by numerous private elementary and secondary schools. Private school enrollment in the Region totaled 66,300 pupils in the 2010-2011 school year, or about 17 percent of the total.

Institutions of Higher Education

There are a number of colleges and universities in the Region that offer bachelor's and/or graduate or professional degrees. The major not-for-profit colleges and universities, those with an enrollment of at least 500 students, are shown on Map IV-8. There are also a number of private, for-profit colleges with centers in the Region.

The Region is also home to one of two medical schools in the State of Wisconsin (the Medical College of Wisconsin); one of two law schools in the State (Marquette University Law School); and the only dental school in the State (Marquette University School of Dentistry). All are located in Milwaukee County.

Universities in the Region cooperate with businesses, government agencies, and other colleges and universities to conduct research, develop products, and otherwise enhance economic development in the Region. These efforts are described in the "Public-Private Relationships" section of Chapter VI.

As part of the 16-district Wisconsin Technical College System, four technical college districts and a small portion of a fifth district can be found in the Region. These five technical college districts, along with main or major campuses, are shown on Map IV-9. These technical colleges offer a variety of degree, diploma, and certificate programs that provide occupational training and vocational preparation required in the workforce. Programs include degree and certificates related to the skilled trades, manufacturing, information technology, health care, agriculture, public safety, and business. Technical colleges work closely with local employers, education partners, workforce and economic development practitioners, and community-based organizations to develop programs that serve the needs of employers and the communities served. Technical colleges also offer career planning services for those entering the workforce and to assist workers who may have been laid off or are looking for new opportunities to choose programs that will prepare them for new careers.

Under the State administrative rules governing the Wisconsin Technical College System, students may attend any technical college of their choosing, regardless of the district in which they reside. However, priority for admission goes first to district residents and then to non-district State residents. District residents and non-district State residents pay the same tuition.

The Waukesha County Technical College also operates a Small Business Center. The Center began operating in 2001 with a community-service focus on helping small business entrepreneurs start and grow small businesses. The Center primarily serves micro-business owners (one- or two- person businesses with less than five employees). The Center offers several short, non-credit courses taught by practicing professionals that help build the knowledge foundation of small business owners. In addition, the Center offers free counseling and mentoring services and networking events.

The University of Wisconsin-Extension (UWEX) provides statewide access to university resources and research. The Division for Business and Entrepreneurship serves businesses and entrepreneurs through the Wisconsin Small Business Development Center (SBDC) Network, Center for Technology Commercialization, Manufacturing Diversity Institute, and the Food Finance Institute.

The SBDC works with business owners and entrepreneurs throughout the State to facilitate business growth and improvement, and to launch successful new companies. Through no-cost consulting, low-cost entrepreneurial education and strategic facilitation, SBDC staff serve as resources for small and emerging mid-size companies. The Wisconsin SBDC is hosted by UWEX and is funded in part through a cooperative agreement with the U.S. Small Business Administration. SBDC offices in the Region are located at UW-Whitewater, serving Walworth and Waukesha Counties in addition to three counties outside the Region; UW-Parkside, serving Kenosha and Racine Counties; and UW-Milwaukee, serving Milwaukee, Ozaukee, and Washington Counties. The SBDC also operates a Center for Innovation and Development at UW-Stout intended to help small businesses with prototype development, and the Wisconsin Innovation Service Center at UW-Whitewater.

The Wisconsin Innovation Service Center (WISC) helps clients make informed decisions by providing research on market opportunities, customers, and competition. Inventors can see the feasibility of a new product idea, identify licensing partners, and solve manufacturing and distribution challenges. Business owners gain competitive advantage through primary research results, helping them to grow and improve their companies.

UW Cooperative Extension offices are located in each county in the Region. Cooperative Extension staff work with citizens, farmers, and local, county, state and federal agencies to address issues related to agriculture and agribusiness, community and economic development, natural resources, family living and youth development.

COMMUNITY SERVICES

Public Safety

Fire protection and emergency medical services are provided throughout the Region. Services are provided through local public fire and rescue departments as well as through private fire and rescue companies which may contract with one or more communities to provide fire and/or emergency medical services. Larger communities typically maintain full-time fire and rescue departments, while smaller communities often rely upon part-time (volunteer or paid-on call) departments, or departments with a combination of full-time and part-time staffing. There is a great deal of cooperation between fire and rescue departments within the Region through mutual aid agreements.

Police protection is provided throughout the Region through local police departments and through county sheriff departments. The roles of the county sheriff departments in the Region vary depending upon the level of local police service provided by the county's communities. Historically, the sheriff department provides police protection in civil towns which do not have their own police departments. Sheriff departments may also contract with towns as well as cities and villages to provide specific policing services. In Milwaukee County, where each city and village is served by a police department, the sheriff's department focuses on county-wide services, such as patrol of the freeway system and county parks, among others.

A number of communities in the Region have pursued some form of service sharing to increase efficiency in the provision of public safety services. For example, seven municipalities comprising the north shore suburbs in Milwaukee County have consolidated the provision of fire protection and emergency medical services through the formation of the North Shore Fire Department. The Waukesha County Sheriff Department provides patrol services on a contract basis to seven communities in Waukesha County. A number of towns in the Region contract with adjacent cities and villages for the provision of fire protection and emergency medical services.

Hospitals

There are 28 general medical and surgical hospitals in the Region, including 11 hospitals in Milwaukee County, five in Waukesha County, three each in Kenosha and Racine Counties, and two each in Ozaukee Walworth, and Washington Counties. The locations of these hospitals are shown on Map IV-10. In addition to the general medical and surgical hospitals, a number of hospitals in the Region specialize in cardiovascular, psychiatric, or rehabilitation care.

A particularly large cluster of medical facilities exists at the Milwaukee Regional Medical Center, located in the City of Wauwatosa in the west central area of Milwaukee County. The Regional Medical Center houses a consortium of six health care institutions, including Children's Hospital, Froedtert Hospital, the Medical College of Wisconsin, BloodCenter of Wisconsin, Milwaukee County Behavioral Health Division, and the Curative Care Network.

Libraries

Public library services in the Region and throughout Wisconsin are generally provided by local units of government, with the State having an important role in ensuring resource sharing and other coordination among libraries. Public library services are financed through a combination of local, county, and State funding sources.

Under an administrative structure established in State law, public library services are coordinated through public library systems, generally consisting of one or more counties, which function to increase access to library materials and services. Public library systems that serve the Region include:

- Eastern Shores (serves Ozaukee County in the Region, along with Sheboygan County)
- Lakeshores (serves Racine and Walworth Counties, except the City of Whitewater)
- Mid-Wisconsin Federated (serves Washington County and the City of Whitewater in the Region, along with Dodge and Jefferson Counties)
- Milwaukee County Federated (serves Milwaukee County)
- Waukesha County Federated (serves Waukesha County)

Under existing arrangements, all public libraries honor valid borrowers' cards from adjacent library systems, with the exception of the Milwaukee County Federated Library System.

There are currently 75 public library locations—including central and local branch library facilities—in the Region, 27 of these located in Milwaukee County.

Academic libraries at colleges and universities also provide important library resources in the Region.

SUMMARY

As infrastructure is an important element of any region's economy, this chapter presents the key infrastructure components in the Southeastern Wisconsin Region. These components are described under four categories: transportation, utilities, educational infrastructure, and community services. Where appropriate, the chapter also notes major issues and challenges that are being faced in maintaining and strengthening these components. The following is a summary of the infrastructure assessment presented in this chapter.

Transportation

- Arterial streets and highways provide critical infrastructure, particularly for employee travel and the movement of goods, accounting for about 30 percent of the total street and highway system mileage, but carrying about 90 percent of the total average weekday traffic in the Region. Freeways represent only about eight percent of the total arterial street and highway system, but carry about 38 percent of the over 42 million vehicle-miles of travel daily on the arterial system. Compared to standard arterials, a much greater proportion of freeways experience extreme or severe traffic congestion.
- The major challenges for arterial streets and highways relate to maintenance, improvement, and rebuilding of that system. Much of the Region's aging freeway system will likely require rebuilding over the next 20 to 30 years, with WisDOT responsible for the most important and costly freeway rebuilding projects. Continued local, county, and State reinvestment in surface arterial streets and highways in the long term will also be needed.
- Urban public transportation, or public transit, provides essential service within and between the large urban areas of the Region. The major challenge relative to the operations of the local transit systems in the Region—in particular the Milwaukee County Transit System—relates to funding, and more specifically the lack of a local dedicated funding source, such as a dedicated sales tax. As a result of financial constraints, including a dependency upon State and Federal funding, the service and ridership of the Region's urban transit systems have declined since 2000.
- A second major transit challenge is the lack of a robust mass transit system to enable residents who are seeking jobs to travel by transit to jobs in adjoining counties. Intergovernmental funding and service agreements between adjacent counties and attempts to create a regional transit authority have been unsuccessful in addressing this issue to date.

- General Mitchell International Airport (GMIA) is southeastern Wisconsin's only air carrier airport, with air carrier activity at GMIA having nearly doubled between 1995 and 2010, to a total of about 9,848,000 air carrier enplaning and deplaning passengers.
- Rail transportation includes rail freight service provided over a total of about 492 miles of active main line, Amtrak intercity passenger train service between Chicago and Minneapolis-St. Paul, and Metra commuter rail service between Kenosha and Chicago.
- Water transportation includes the Port of Milwaukee, which is a major transportation terminal and has the largest intermodal sea container yard in the State of Wisconsin, and the Lake Express Car Ferry, which provides automobile and passenger ferry service across Lake Michigan.

Utilities

- In 2010, 78 municipal water supply utility systems provided water to about 1.68 million persons, or about 82 percent of the Region's residents, with a service area of about 444 square miles, or about 17 percent of the area of the Region. These systems primarily rely on groundwater or Lake Michigan as a source of supply.
- Challenges related to water supply relate primarily to ensuring that the existing water supply infrastructure continues to meet future water supply demands. A particular issue is whether to extend the Lake Michigan water supply to select areas east and west of the subcontinental divide.
- The total area served by public sanitary sewers in the Region increased from about 477 square miles in 2000 to about 525 square miles in 2010, with the total number of persons served increasing from about 1.71 million persons to 1.80 million persons. These increases reflect new development designed to be served by sanitary sewers and retrofitting in existing urban areas.
- The Milwaukee Metropolitan Sewerage District (MMSD) provides sewage treatment services for 28 municipalities in the Region through two major Lake Michigan shoreline-based treatment plants and a network of major trunk and intercepting sewers and inline storage facilities (deep tunnels). The challenges that remain to be met in the MMSD service area relate largely to dealing with clear water inflow and infiltration during very extreme storm events.
- Electric power and natural gas services are available on demand throughout most of the Region, with natural gas service provided by We Energies, Inc. and electric power provided by We Energies, Inc., Alliant Energy, and a number of municipal electric utilities. The Region's energy rates are believed to be reasonable compared to other metropolitan areas.
- Landline and wireless broadband telecommunications facilities and service are provided entirely in the private sector in the Region. In general, these private companies maintain a posture of being able to adequately and reliably serve the broadband needs of any commercial enterprise.

Educational Infrastructure

- The Region is served by all or parts of 56 union high school and K-12 districts, the largest of these being the Milwaukee Public School System, which serves the City of Milwaukee. A total of about 326,500 pupils were enrolled in public schools in the 2010-2011 school year, and about 66,300 pupils were enrolled in private schools in the 2010-2011 school year.
- The Region is home to a number of colleges and universities that offer bachelor's and/or graduate or professional degrees; five technical college districts as part of the Wisconsin Technical College System; one of two medical schools in the State of Wisconsin (the Medical College of Wisconsin); one of two law schools in the State (Marquette University Law School); and the only dental school in the State (Marquette University School of Dentistry).

Community Services

- Fire protection and emergency medical services are provided throughout the Region through local public fire and rescue departments and private fire and rescue companies which may contract with one or more communities to provide these services. Many fire and rescue departments cooperate through mutual aid agreements. Police protection is provided throughout the Region through a combination of local police departments and county sheriff departments, with the roles of county sheriff departments varying depending upon the level of local police service provided by the county's communities. A number of communities in the Region have also pursued some form of service sharing to increase efficiency in the provision of public safety services.
- There are 28 general medical and surgical hospitals in the Region, as well as a number of hospitals that specialize in cardiovascular, psychiatric, or rehabilitation care. The Milwaukee Regional Medical Center hosts a particularly large cluster of medical facilities.
- Public library services in the Region are generally provided by local units of government, and are financed through a combination of local, county, and State funding sources. There are five public library systems that serve the Region, with 75 public library locations, 27 of which are located in Milwaukee County. Academic libraries at colleges and universities also provide important library resources in the Region.

Table IV-1

DISTRIBUTION OF EXISTING ARTERIAL STREET AND HIGHWAY MILEAGE IN SOUTHEASTERN WISCONSIN BY COUNTY AND JURISDICTIONAL CLASSIFICATION: 2009

County	Existing Arterial Miles				Total
	State		County	Local	
	Freeway	Standard Arterial			
Kenosha	12.0	108.1	169.6	66.1	355.8
Milwaukee	66.4	184.7	86.1	463.1	800.3
Ozaukee	26.8	51.7	145.6	78.4	302.5
Racine	12.0	153.2	138.6	127.1	430.9
Walworth	50.3	165.4	179.3	71.0	466.0
Washington	42.7	144.4	152.3	86.1	425.5
Waukesha	58.7	172.4	370.1	175.4	776.6
Region	268.9	979.9	1,241.6	1,067.2	3,557.6

Source: SEWRPC.

Table IV-2

ARTERIAL VEHICLE-MILES OF TRAVEL ON AN AVERAGE WEEKDAY IN SOUTHEASTERN WISCONSIN BY COUNTY: 2005

County	Average Vehicles-Miles of Arterial Travel (1,000's)				Total Mileage
	Freeway		Standard Arterial		
	Number of Miles	Percent of Total	Number of Miles	Percent of Total	
Kenosha	913	26.6	2,523	73.4	3,436
Milwaukee	7,162	41.4	10,131	58.6	17,293
Ozaukee	1,008	42.9	1,344	57.1	2,352
Racine	948	25.7	2,744	74.3	3,692
Walworth	882	34.7	1,657	65.3	2,539
Washington	1,550	44.3	1,949	55.7	3,499
Waukesha	3,585	37.2	6,047	62.8	9,632
Region	16,048	37.8	26,395	62.2	42,443

Source: Wisconsin Department of Transportation and SEWRPC.

Table IV-3

FREEWAY AND SURFACE ARTERIAL TRAFFIC CONGESTION DEFINITIONS

Freeway			
Level of Traffic Congestion	Level of Service	Average Speed	Operating Conditions
None	A and B	Freeway free-flow speed	No restrictions on ability to maneuver and change lanes.
None	C	Freeway free-flow speed	Ability to maneuver and change lanes noticeably restricted.
Moderate	D	1 to 2 mph below free-flow speed	Ability to maneuver and change lanes more noticeably limited; reduced driver physical and psychological comfort levels.
Severe	E	Up to 10 mph below free-flow speed	Virtually no ability to maneuver and change lanes. Operation at maximum capacity. No usable gaps in the traffic stream to accommodate lane changing.
Extreme	F	Typically 20 to 30 mph or less	Breakdown in vehicular flow with stop-and-go, bumper-to-bumper traffic.
Moderate	D	1 to 2 mph below free-flow speed	Ability to maneuver and change lanes more noticeably limited; reduced driver physical and psychological comfort levels.
Severe	E	Up to 10 mph below free-flow speed	Virtually no ability to maneuver and change lanes. Operation at maximum capacity. No usable gaps in the traffic stream to accommodate lane changing.
Extreme	F	Typically 20 to 30 mph or less	Breakdown in vehicular flow with stop-and-go, bumper-to-bumper traffic.

Surface Arterial			
Level of Traffic Congestion	Level of Service	Average Speed	Operating Conditions
None	A and B	70 to 100 percent of free-flow speed	Ability to maneuver within traffic stream is unimpeded. Control delay at signalized intersections is minimal.
None	C	50 to 100 percent of free-flow speed	Restricted ability to maneuver and change lanes at mid-block locations.
Moderate	D	40 to 50 percent of free-flow speed	Restricted ability to maneuver and change lanes. Small increases in flow lead to substantial increases in delay and decreases in travel speed.
Severe	E	33 to 40 percent of free-flow speed	Significant restrictions on lane changes. Traffic flow approaches instability.
Extreme	F	25 to 33 percent of free-flow speed	Flow at extremely low speeds. Intersection congestion with high delays, high volumes, and extensive queuing.
Moderate	A and B	70 to 100 percent of free-flow speed	Ability to maneuver within traffic stream is unimpeded. Control delay at signalized intersections is minimal.
Severe	C	50 to 100 percent of free-flow speed	Restricted ability to maneuver and change lanes at mid-block locations.
Extreme	D	40 to 50 percent of free-flow speed	Restricted ability to maneuver and change lanes. Small increases in flow lead to substantial increases in delay and decreases in travel speed.

Source: SEWRPC.

Table IV-4

**TRAFFIC CONGESTION ON THE ARTERIAL STREET AND HIGHWAY
SYSTEM IN THE REGION BY COUNTY: 2005**

FREEWAYS

County	Over Design Capacity						Total Mileage
	Moderate Congestion		Severe Congestion		Extreme Congestion		
	Mileage	Percent of Total	Mileage	Percent of Total	Mileage	Percent of Total	
Kenosha.....	--	--	--	--	--	--	12.1
Milwaukee.....	8.1	12.3	17.4	26.4	25.4	38.6	65.8
Ozaukee	0.9	3.3	--	--	--	--	27.4
Racine.....	--	--	--	--	--	--	12.0
Walworth.....	--	--	--	--	--	--	50.0
Washington.....	--	--	--	--	--	--	42.1
Waukesha.....	7.3	12.5	5.6	9.6	3.6	6.1	58.6
Region	16.3	6.1	23.0	8.6	29.0	10.8	268.0

STANDARD ARTERIALS

County	Over Design Capacity						Total Mileage
	Moderate Congestion		Severe Congestion		Extreme Congestion		
	Mileage	Percent of Total	Mileage	Percent of Total	Mileage	Percent of Total	
Kenosha.....	12.8	4.2	1.0	0.3	2.6	0.8	307.9
Milwaukee.....	75.4	10.5	8.2	1.1	30.2	4.2	719.5
Ozaukee	5.7	2.5	0.1	0.0	0.7	0.3	226.1
Racine.....	9.3	2.7	1.1	0.3	4.1	1.2	341.4
Walworth.....	6.2	1.6	1.0	0.3	0.3	0.1	390.5
Washington.....	11.4	3.2	--	--	0.6	0.2	360.6
Waukesha.....	55.2	8.0	7.3	1.1	8.4	1.2	688.2
Region	176.0	5.8	18.7	0.6	46.9	1.5	3,034.2

Source: SEWRPC.

Table IV-5

**SELECT CHARACTERISTICS OF URBAN TRANSIT SYSTEMS
IN THE SOUTHEASTERN WISCONSIN REGION: 2010**

Urban Transit System	Service Hours	Number of Routes	Annual Revenue Passengers
Kenosha Area Transit (KAT)	<u>Weekdays</u> 6:00 a.m. – 7:30 p.m. <u>Saturdays</u> 6:00 a.m. – 5:00 p.m.	7	1,469,500
Milwaukee County Transit System (MCTS)			
Total System	<u>Weekdays</u> 5:00 a.m. – 1:00 a.m. <u>Weekends</u> 6:00 a.m. – 12:00 a.m.	42	38,641,600
Freeway Flyer Only	<u>Weekdays Only</u> 6:00 a.m. – 9:00 a.m. 3:30 p.m. – 7:30 p.m.	12	
Metra Commuter Rail	<u>Weekdays</u> 5:30 a.m. – 1:30 a.m. <u>Saturdays</u> 5:30 a.m. – 12:00 a.m. <u>Sunday</u> 6:30 a.m. – 11:30 p.m.	1	-- ^a
Ozaukee County Express	<u>Weekdays Only</u> 5:30 a.m. – 6:30 p.m.	1	113,600
Racine Belle Urban System (BUS)	<u>Weekdays</u> 5:30 a.m. – midnight <u>Saturdays</u> 5:30 a.m. – 10:30 p.m. <u>Sundays</u> 9:30 a.m. – 7:00 p.m.	10	1,152,800
Washington County Commuter Express	<u>Weekdays Only</u> 5:30 a.m. – 8:00 p.m. (Peak direction service only)	1	111,200
Waukesha County Freeway Flyer	<u>Weekdays</u> 5:15 a.m. – 9:00 p.m. <u>Weekends (Route 901 Only)</u> 8:00 a.m. – 8:30 p.m.	4	582,900
City of Waukesha Metro Transit	<u>Weekdays</u> 6:00 a.m. – 10:00 p.m. <u>Saturdays</u> 8:30 a.m. – 10:00 p.m. <u>Sundays</u> 9:30 a.m. – 7:00 p.m.	11	531,400

^aAccording to a 2006 Metra travel survey, an average of 300 passengers boarded the Union Pacific North Line at the Kenosha station on a daily basis.

Source: SEWRPC.

Table IV-6

**EXISTING AREA AND POPULATION SERVED BY PUBLIC
WATER UTILITIES IN THE REGION BY COUNTY: 2000 AND 2010**

County	Area Served by Public Water Utilities				Population Served by Public Water Utilities			
	2000		2010		2000		2010	
	Square Miles	Percent of County/Region Area	Square Miles	Percent of County/Region Area	Persons	Percent of County/Region Area	Persons	Percent of County/Region Area
Kenosha.....	29.8	10.7	34.7	12.5	111,000	74.2	125,800	75.6
Milwaukee.....	180.9	74.5	187.3	77.2	927,300	98.6	938,400	99.0
Ozaukee	15.7	6.7	23.4	9.9	45,400	55.2	55,800	64.6
Racine.....	37.9	11.1	44.3	13.0	146,400	77.5	154,900	79.3
Walworth.....	22.0	3.8	24.4	4.2	56,200	61.1	63,400	62.0
Washington.....	21.4	4.9	27.1	6.2	66,800	56.9	80,100	60.7
Waukesha.....	82.3	14.2	102.6	17.7	228,100	63.2	261,500	67.1
Region	390.0	14.5	443.8	16.5	1,581,200	81.9	1,679,900	83.2

Source: SEWRPC.

Table IV-7

**EXISTING AREA AND POPULATION SERVED BY PUBLIC
SANITARY SEWERAGE SYSTEMS IN THE REGION BY COUNTY: 2000 AND 2010**

County	Area Served by Public Sanitary Sewers				Population Served by Public Sanitary Sewers			
	2000		2010		2000		2010	
	Square Miles	Percent of County/Region Area	Square Miles	Percent of County/Region Area	Persons	Percent of County/Region Area	Persons	Percent of County/Region Area
Kenosha.....	41.2	14.8	45.8	16.5	133,800	89.5	150,200	90.3
Milwaukee.....	193.2	79.6	198.7	81.9	938,800	99.9	947,000	99.9
Ozaukee	29.3	12.4	33.3	14.1	64,400	78.2	67,800	78.5
Racine.....	51.6	15.1	57.0	16.7	169,900	90.0	176,100	90.1
Walworth.....	27.6	4.8	30.3	5.3	62,100	67.5	70,500	69.0
Washington.....	23.2	5.3	29.1	6.7	71,500	60.9	84,300	63.9
Waukesha.....	110.7	19.1	130.3	22.4	272,200	75.5	301,100	77.2
Region	476.8	17.7	524.5	19.5	1,712,700	88.7	1,797,000	89.0

Source: SEWRPC.

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Figure IV-1

**AT A GLANCE:
MILWAUKEE COUNTY TRANSIT SYSTEM**

The Milwaukee County Transit System (MCTS) was formed in 1975, after the County took over the assets of the Milwaukee & Suburban Transport Company, a privately-owned bus route operator. It is the 30th largest transit system in the United States. In 1987 and again in 1999, MCTS was selected as the best transit system in the country by the American Public Transportation Association (APTA).

Management Structure

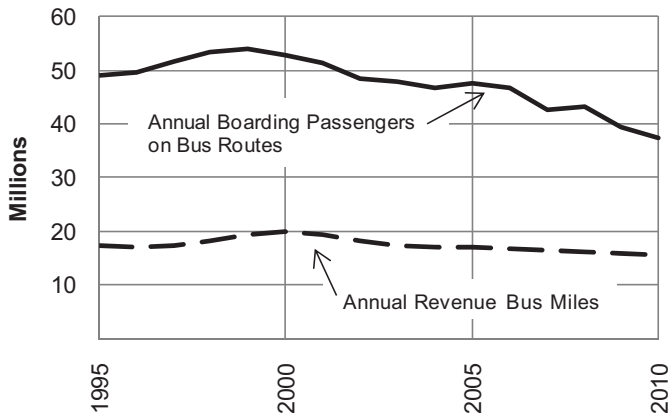
Milwaukee County owns all of the assets of the transit system and the County Executive and County Board set the transit system’s budget and the policies.

Milwaukee County contracts with Milwaukee Transport Services, Inc., a private not-for-profit corporation, to manage and operate the transit system in coordination with County’s Transportation, Public Works and Transit Committee, and the Department of Transportation and Public Works.

2010 Statistics

Fleet size	413 buses
Total number of routes.....	54
-Regular and shuttle routes	31
-Freeway flyer and “UBUS” routes	12
-Schoolday “tripper” routes.....	11
Average weekday passenger trips.....	138,000
Average passengers per bus hour.....	34.1
Service Hours	4:30am-1:00am
Percent of riders with less than \$36,000 household income.....	60%
Percent of riders who use MCTS primarily for work.....	45%

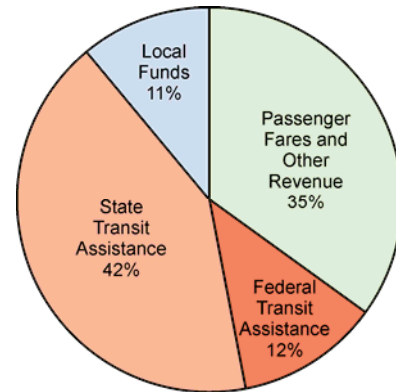
Bus Service Miles and Ridership Have Declined Since Year 2000



Source of Operating Funds (2010)

Fares and Other Revenue	\$57.6 million
Federal Transit Assistance	19.2 million
State Transit Assistance	69.0 million
County Funds	18.6 million
Total Operating Budget:	\$164.4 million

Source of Operating Funds



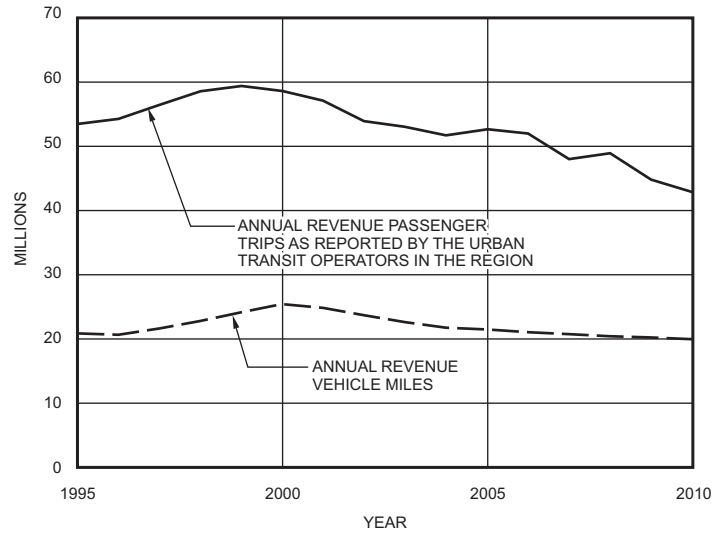
Capital Expenditures (2001-2010)

Average annual capital expenses:	\$10.4 million
Typical Federal share:	80%
Typical County share:	20%

Source: Milwaukee County Transit System and SEWRPC.

Figure IV-2

**BUS SERVICE MILES AND RIDERSHIP
OF THE URBAN TRANSIT SYSTEMS
IN THE REGION: 1995-2010**



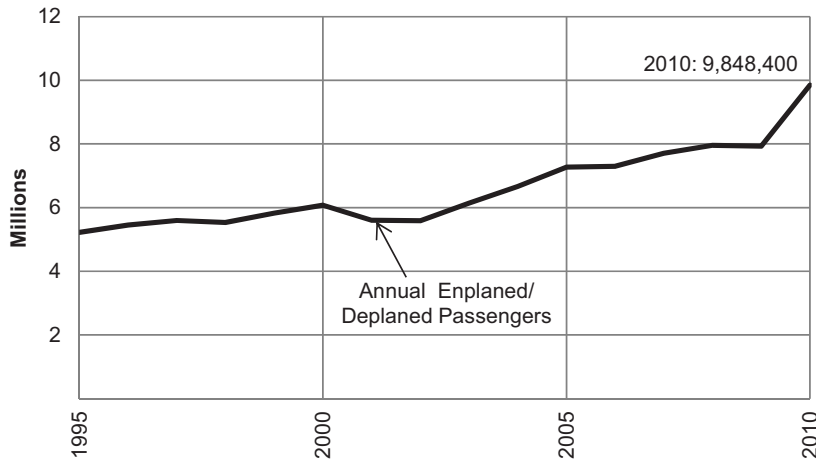
Source: Transit Operators and SEWRPC.

Figure IV-3

**AT A GLANCE:
GENERAL MITCHELL INTERNATIONAL AIRPORT**

General Mitchell International Airport (GMIA) is owned and operated by Milwaukee County, and is the only airport in Southeastern Wisconsin with air carrier passenger service. It also accommodates general aviation and military aircraft operations. Convenient access to the Airport is provided via county, state, and interstate highways, Amtrak, public transit, and intercity bus.

Passenger Activity Has Nearly Doubled Since 1995



Carriers Providing Services in 2011

Air Passenger Services (9):

- Air Canada
- AirTran Airways
- American Eagle Airlines
- Continental Express / ExpressJet Airlines, Inc.
- Delta Airlines
- Frontier Airlines
- Southwest Airlines
- United Express
- U.S. Airways Group, Inc

Air Freight Services (3):

- United Parcel Service (UPS)
- Federal Express Corporation (FedEx)
- Freight Runners Express

Other Airport Businesses

In addition to the 12 air carriers above, 14 firms provide employment in activities directly supporting airline operations including charters, airline food service, aircraft maintenance, aircraft servicing, air traffic control and security. Another 13 firms employ persons directly supporting airline passengers.

Key Statistics

Jobs (2005).....9,514 (direct & indirect)
 Flights per Day (July, 2011).....215 arrivals, 215 departures
 Air Freight (2010).....171,123,100 pounds
 Air Mail (2010)1,459,600 pounds

Operating Costs and Revenues (2009)

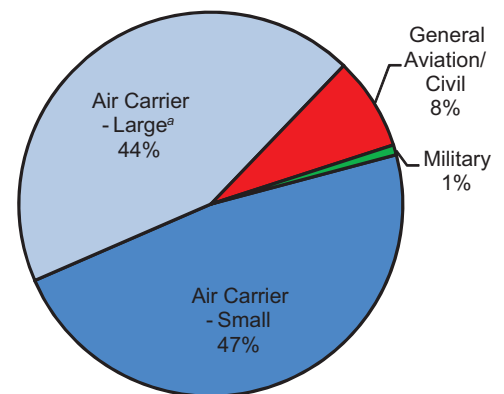
Expenditures \$69.5 million
 Revenues..... 71.9 million
 Revenues Returned to County.....\$ 2.4 million

NOTE: About \$70,000 of Timmerman Field's operating expenses were covered by GMIA's surplus revenues.

Annual Air Operations (2010)

Air Carrier-Small 91,200
 Air Carrier-Large^a..... 83,700
 General Aviation/Civil 15,100
 Military 1,600
 Total Air Operations 191,600

^aA large air carrier has 60 or more seats.



Sources: Jobs data come from a study by Breitenbach Weiss and Martin Associates, The Local and Regional Economic Impacts of Milwaukee County's General Mitchell International Airport, Milwaukee County, Wisconsin, 2005. The remaining data come from General Mitchell International Airport and SEWRPC.

Figure IV-4

**AT A GLANCE:
PORT OF MILWAUKEE**

The Port of Milwaukee is a multimodal transportation terminal with the largest intermodal sea container yard in the State of Wisconsin. The Port is operated by the Board of Harbor Commissioners of the City of Milwaukee. Transportation options serving the Port include the St. Lawrence Seaway, linking the Great Lakes to the Atlantic Ocean; inland river barge service linking to Gulf ports and the inland waterways; two Class I railroads, the Union Pacific and Canadian Pacific; and immediate interstate access to I-94. Passenger and auto ferry service is also available between the Port and Muskegon, Michigan, via the Lake Express.

The Port of Milwaukee handles a diverse mix of cargoes including steel, containerized cargo, salt, coal, limestone, bio-diesel, ethanol, cement, fertilizers, construction machinery, mining machinery including Caterpillar and Joy Global mining shovels, wind tower equipment, and grain.

Employment

Jobs (2010).....2,028 (direct & indirect)

Operating Costs and Revenues (2009)

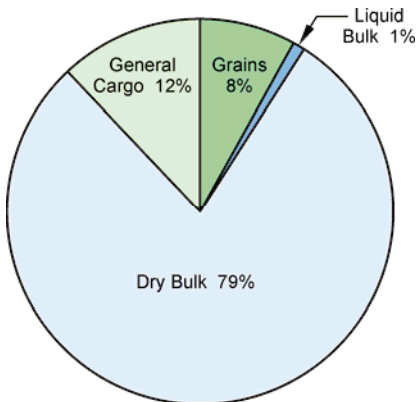
Expenditures \$2,852,200
 Revenues 3,888,200
 Net Income \$1,036,000

NOTE: Does not include about \$1.2 million in revenue from Milwaukee World Festivals, Inc. Any excess revenue generated by the Port are transferred to the City's General Fund to ease the property tax burden.

Annual Port Tonnage, by Cargo Type^a (2010)

Dry Bulk 1,831,000
 General Cargo 280,800
 Grains 197,300
 Liquid Bulk 15,500
 Total Metric Tons 2,324,600

^aLandborne and waterborne.



Sources: Port of Milwaukee and SEWRPC.

Port Tenants in 2010

Related to Transshipment of Cargo (14):

- Cargill Salt Incorporated
- Edward E. Gillen Company
- Federal Marine Terminals, Inc.
- Innovation Fuel – IFI Tanco
- Lafarge Corporation
- Kinder Morgan (AKA Milwaukee Bulk Terminals, Inc.)
- KM Transload
- Milwaukee Intermodal Terminal
- North American Salt Co.
- Portland Trucking
- Shea Kenny Construction
- St. Mary's Cement
- U.S. Coast Guard
- U.S. Navy

Unrelated to Transshipment of Cargo (5):

- Discovery World at Pier Wisconsin
- Harbor House Restaurant
- Lake Express Ferry Service
- Milwaukee Art Museum
- Milwaukee World Festivals





Other Port Businesses

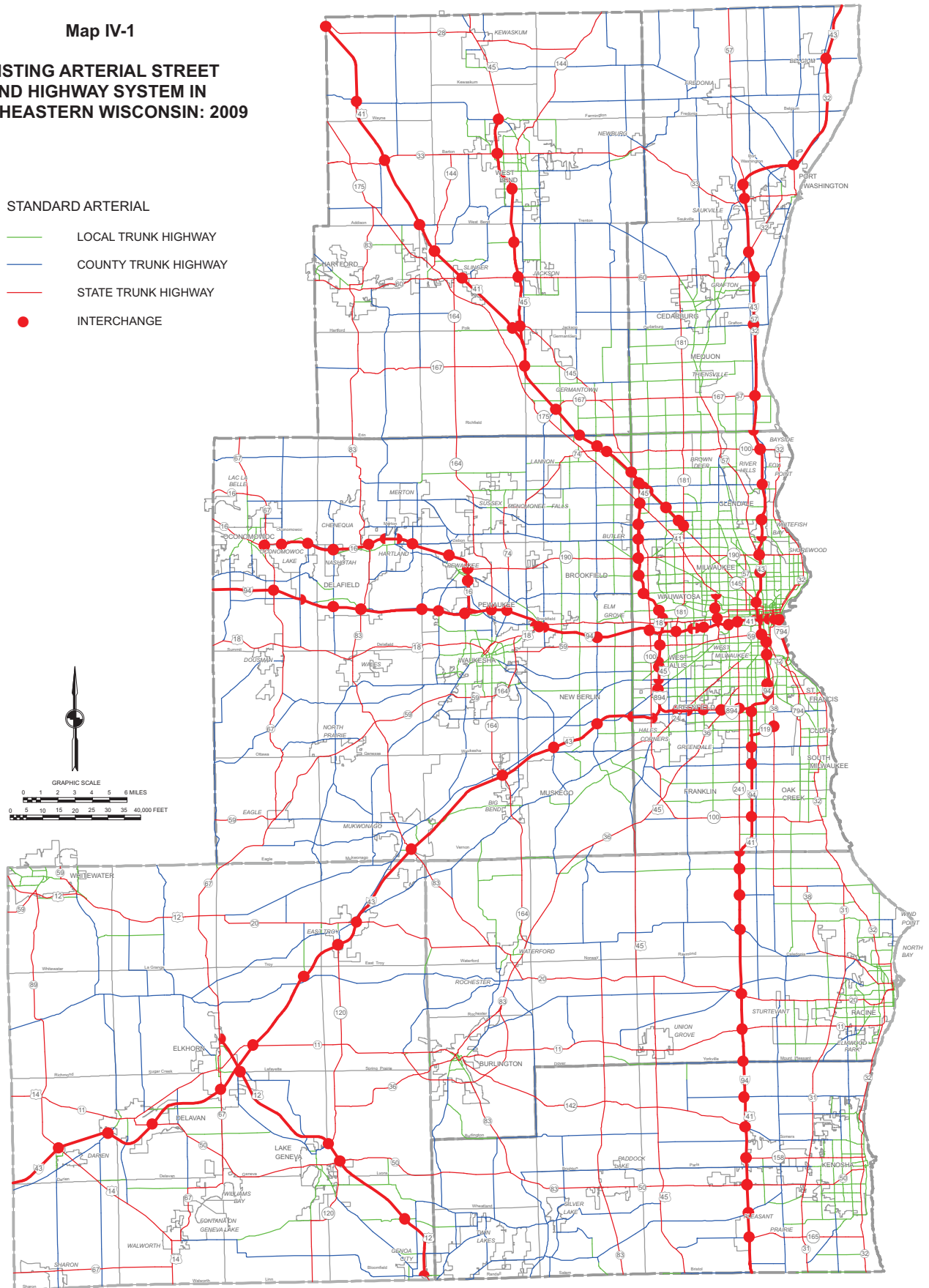
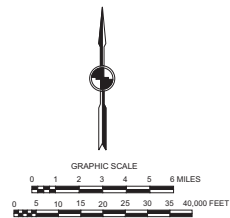
More than 70 agencies or businesses are directly or indirectly involved in Port operations. These agencies and businesses can generally be categorized as those firms directly engaged in handling the cargo or servicing the ships, barges, and Port facilities, or those firms whose primary business is to consolidate or forward the commodities or goods through the Port.

Map IV-1

**EXISTING ARTERIAL STREET
AND HIGHWAY SYSTEM IN
SOUTHEASTERN WISCONSIN: 2009**

STANDARD ARTERIAL

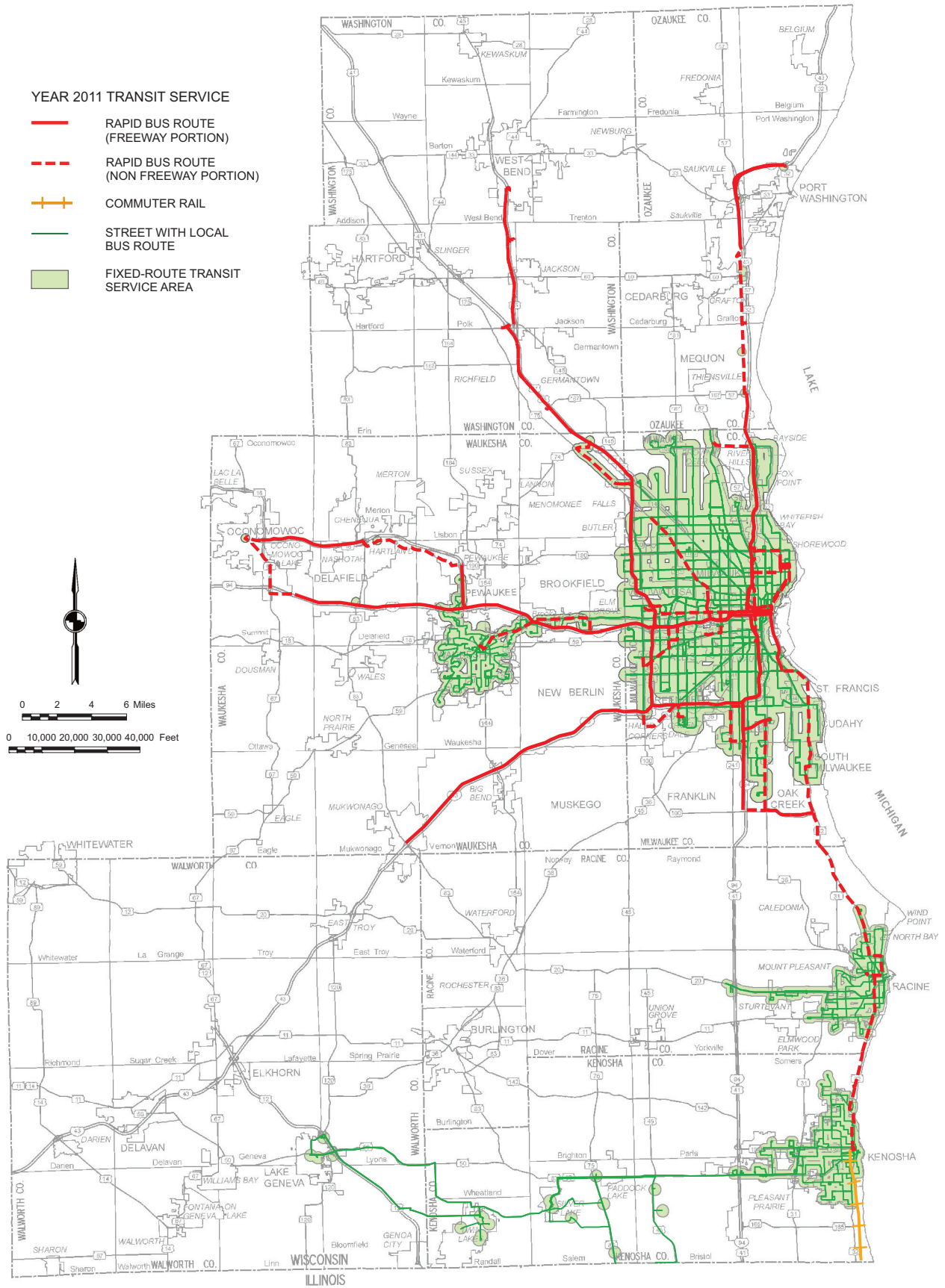
-  LOCAL TRUNK HIGHWAY
-  COUNTY TRUNK HIGHWAY
-  STATE TRUNK HIGHWAY
-  INTERCHANGE



Source: SEWRPC

Map IV-2

FIXED-ROUTE PUBLIC TRANSIT SERVICE WITHIN THE SOUTHEASTERN WISCONSIN REGION: 2011



Source: SEWRPC

Map IV-3

AIRPORTS INCLUDED AS PART OF THE REGIONAL AIRPORT SYSTEM PLAN

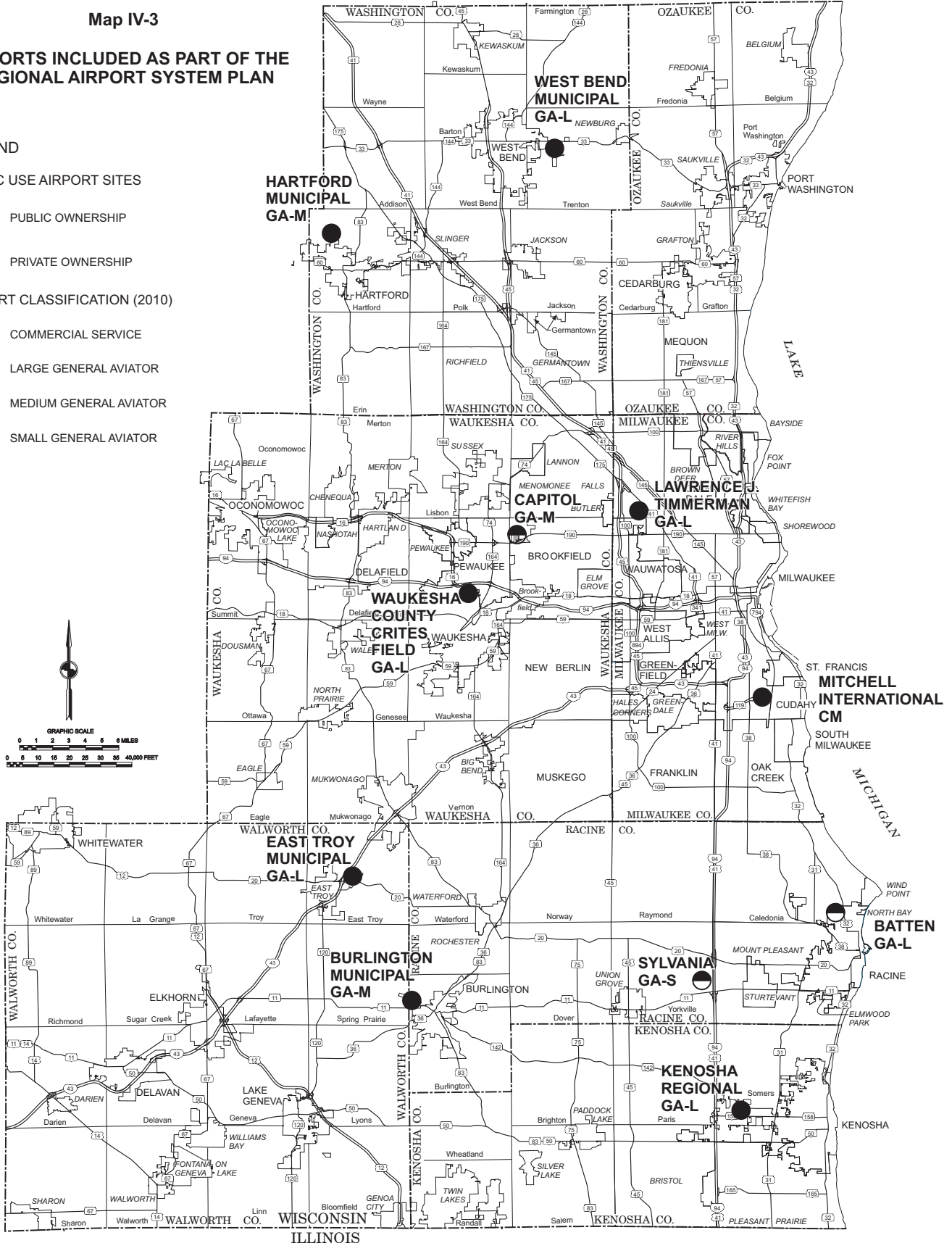
LEGEND

PUBLIC USE AIRPORT SITES

- PUBLIC OWNERSHIP
- ◐ PRIVATE OWNERSHIP

AIRPORT CLASSIFICATION (2010)

- CM** COMMERCIAL SERVICE
- GA-L** LARGE GENERAL AVIATOR
- GA-M** MEDIUM GENERAL AVIATOR
- GA-S** SMALL GENERAL AVIATOR



Source: SEWRPC.

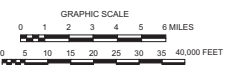
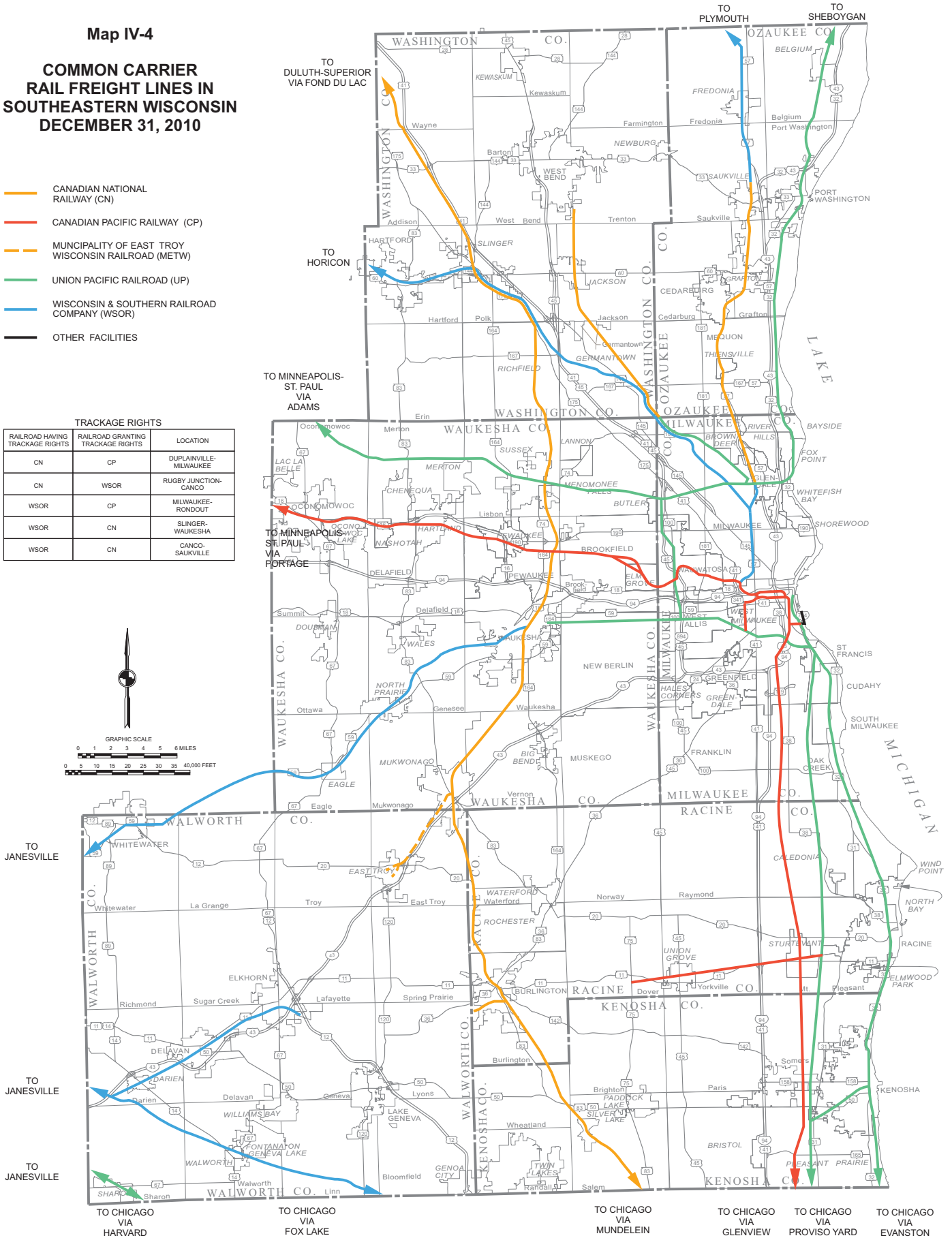
Map IV-4

**COMMON CARRIER
RAIL FREIGHT LINES IN
SOUTHEASTERN WISCONSIN
DECEMBER 31, 2010**

- CANADIAN NATIONAL RAILWAY (CN)
- CANADIAN PACIFIC RAILWAY (CP)
- MUNICIPALITY OF EAST TROY WISCONSIN RAILROAD (METW)
- UNION PACIFIC RAILROAD (UP)
- WISCONSIN & SOUTHERN RAILROAD COMPANY (WSOR)
- OTHER FACILITIES

TRACKAGE RIGHTS




RAILROAD HAVING TRACKAGE RIGHTS	RAILROAD GRANTING TRACKAGE RIGHTS	LOCATION
CN	CP	DUPLAINVILLE-MILWAUKEE
CN	WSOR	RUGBY JUNCTION-GANCO
WSOR	CP	MILWAUKEE-RONDOUT
WSOR	CN	SLINGER-WAUKESHA
WSOR	CN	CANCO-SAUKVILLE

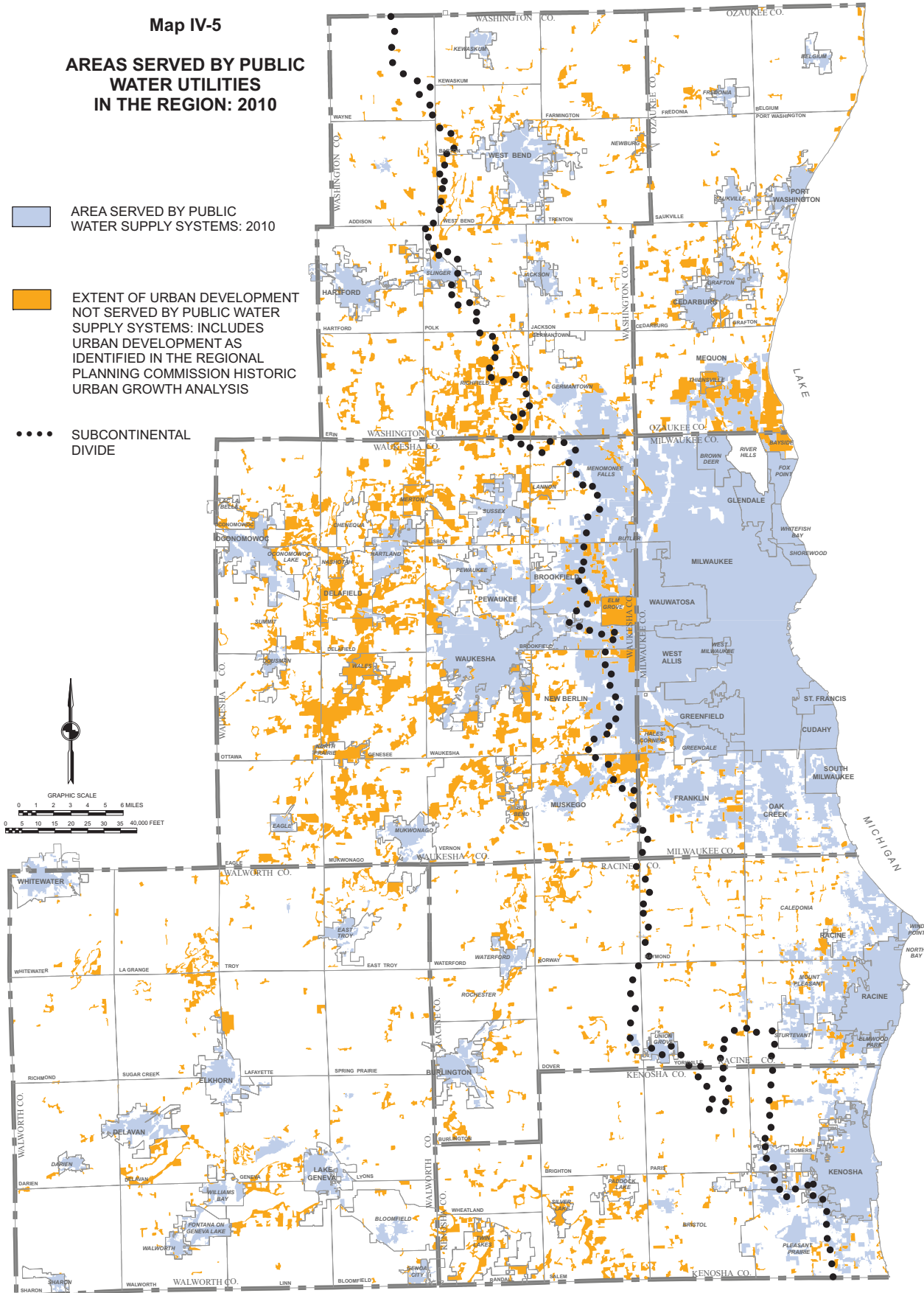


Source: Wisconsin Department of Transportation and SEWRPC.

Map IV-5

**AREAS SERVED BY PUBLIC WATER UTILITIES
IN THE REGION: 2010**





-  AREA SERVED BY PUBLIC WATER SUPPLY SYSTEMS: 2010
-  EXTENT OF URBAN DEVELOPMENT NOT SERVED BY PUBLIC WATER SUPPLY SYSTEMS: INCLUDES URBAN DEVELOPMENT AS IDENTIFIED IN THE REGIONAL PLANNING COMMISSION HISTORIC URBAN GROWTH ANALYSIS
-  SUBCONTINENTAL DIVIDE

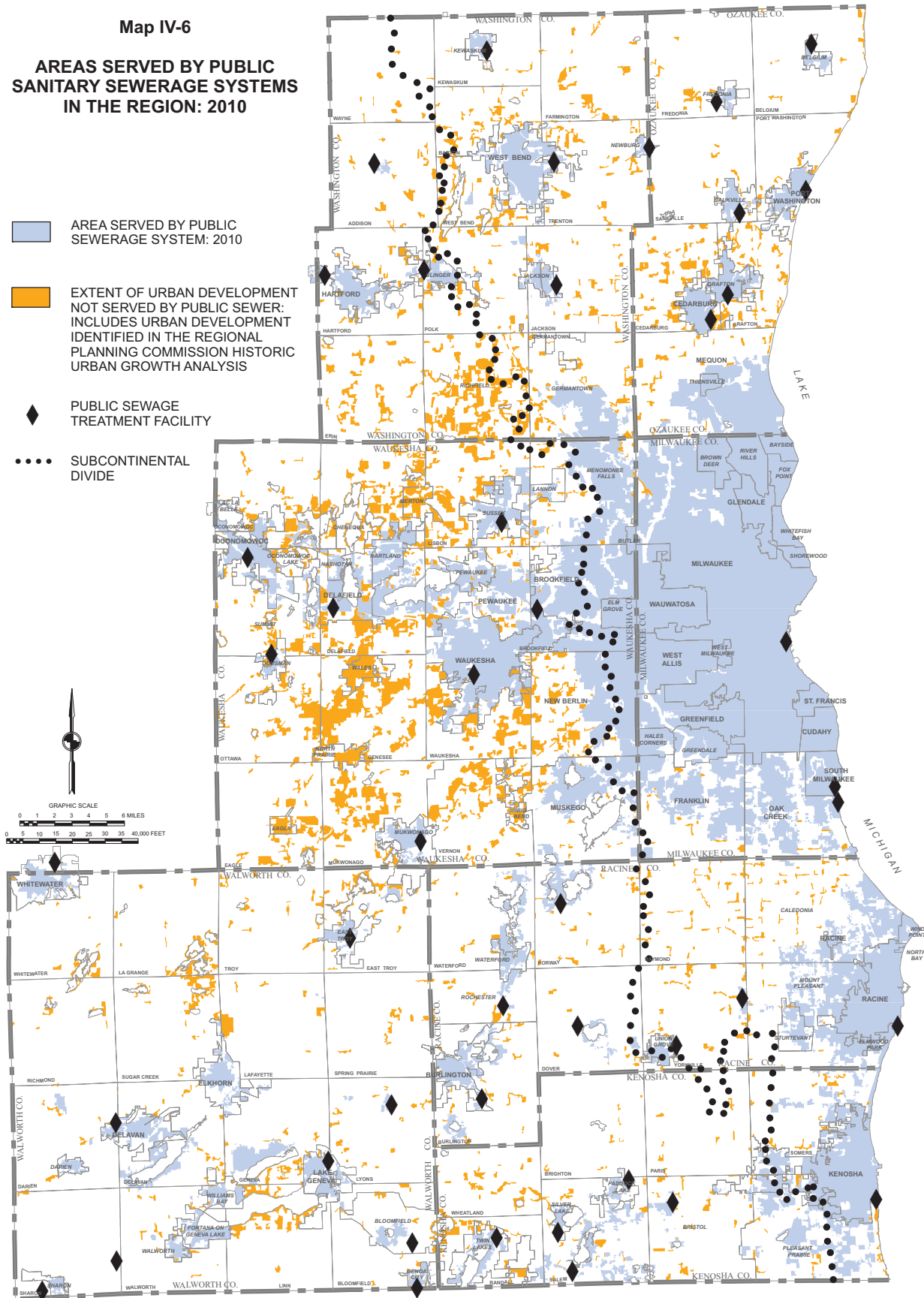


Source: SEWRPC

Map IV-6

AREAS SERVED BY PUBLIC SANITARY SEWERAGE SYSTEMS IN THE REGION: 2010






-  AREA SERVED BY PUBLIC SEWERAGE SYSTEM: 2010
-  EXTENT OF URBAN DEVELOPMENT NOT SERVED BY PUBLIC SEWER: INCLUDES URBAN DEVELOPMENT IDENTIFIED IN THE REGIONAL PLANNING COMMISSION HISTORIC URBAN GROWTH ANALYSIS
-  PUBLIC SEWAGE TREATMENT FACILITY
-  SUBCONTINENTAL DIVIDE

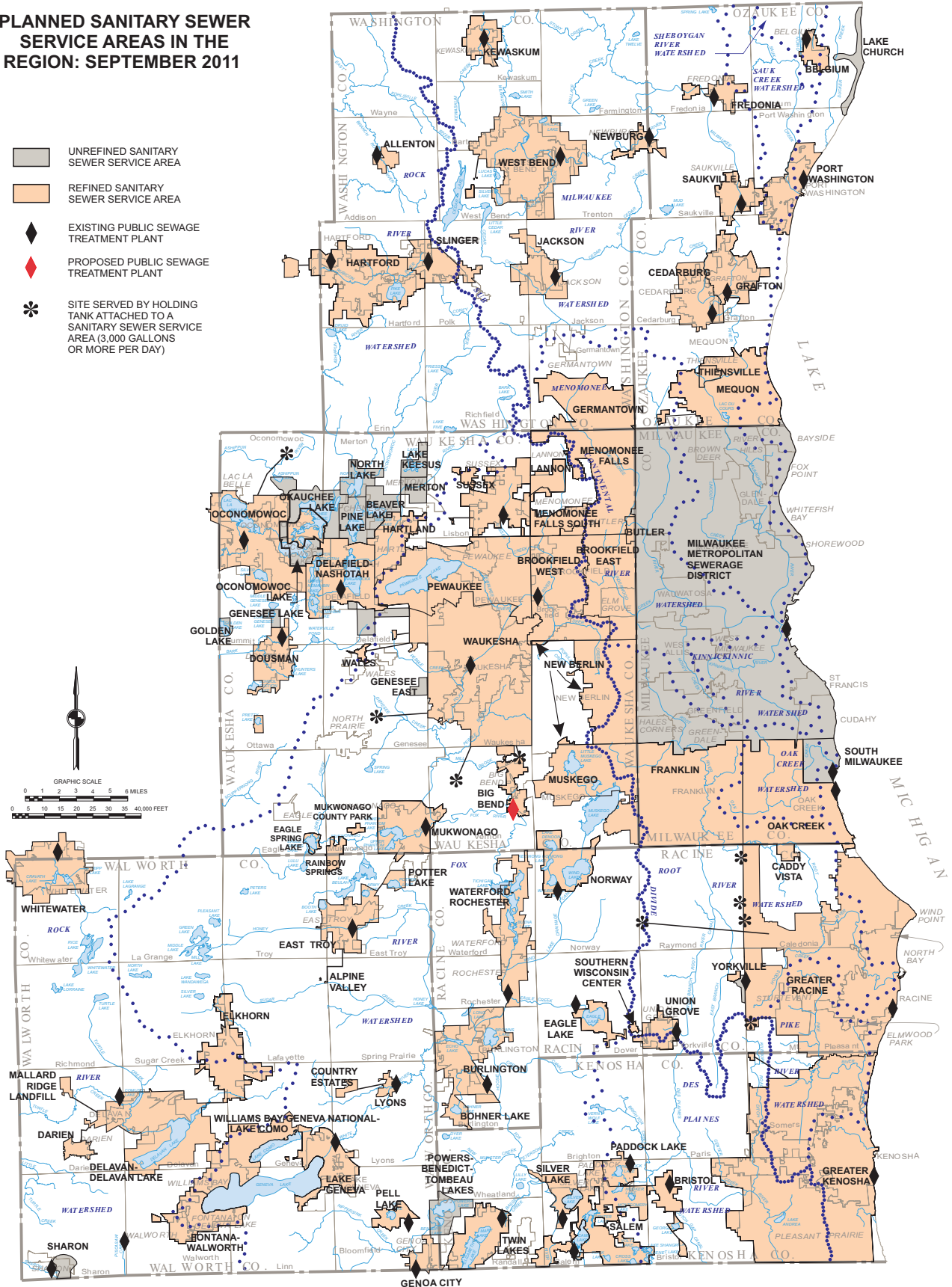


Source: SEWRPC

Map IV-7

PLANNED SANITARY SEWER SERVICE AREAS IN THE REGION: SEPTEMBER 2011

-  UNREFINED SANITARY SEWER SERVICE AREA
-  REFINED SANITARY SEWER SERVICE AREA
-  EXISTING PUBLIC SEWAGE TREATMENT PLANT
-  PROPOSED PUBLIC SEWAGE TREATMENT PLANT
-  SITE SERVED BY HOLDING TANK ATTACHED TO A SANITARY SEWER SERVICE AREA (3,000 GALLONS OR MORE PER DAY)



Source: SEWRPC.

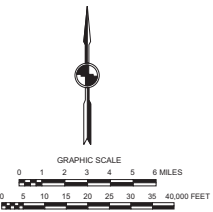
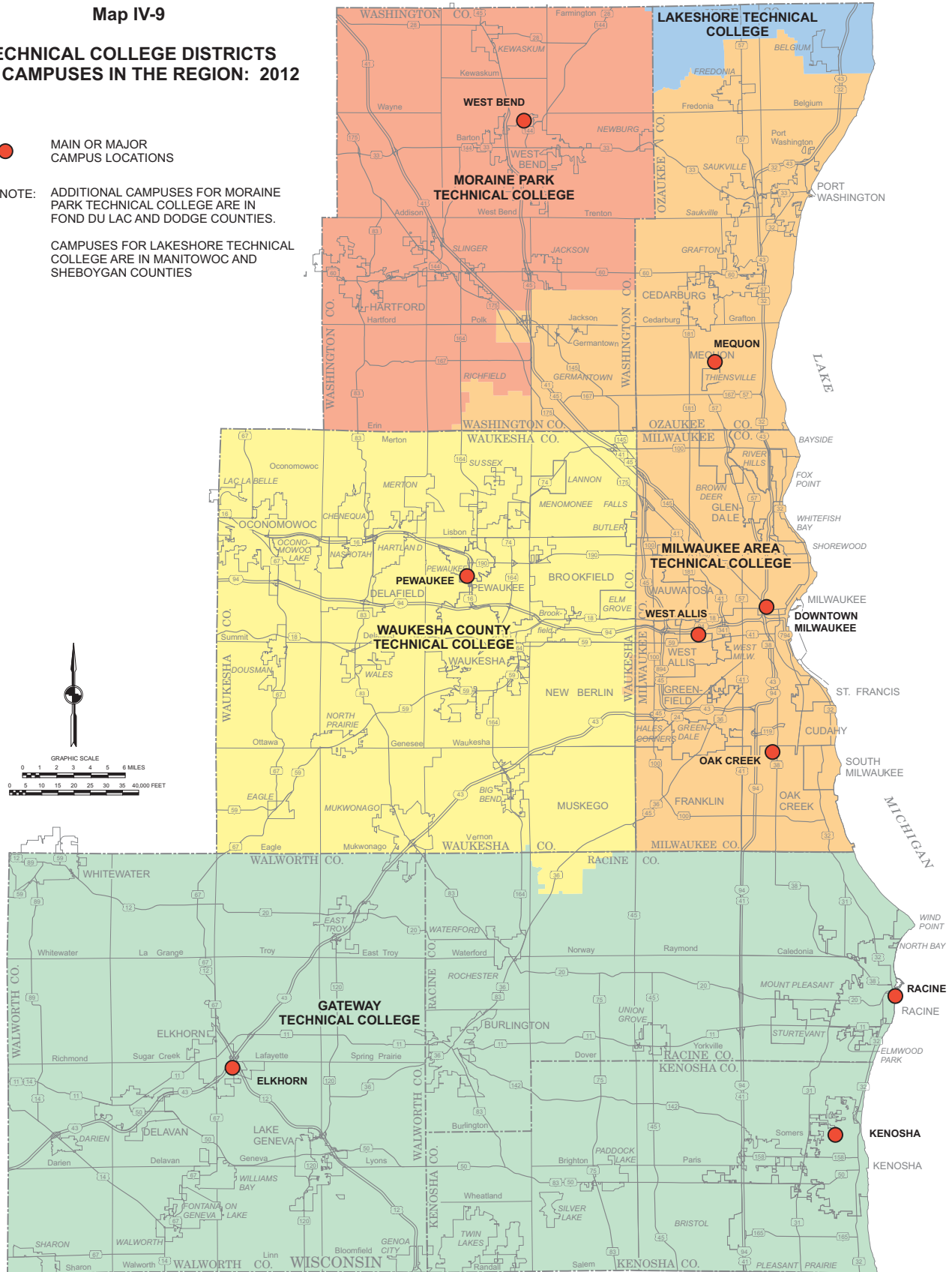
Map IV-9

**TECHNICAL COLLEGE DISTRICTS
AND CAMPUSES IN THE REGION: 2012**

● MAIN OR MAJOR
CAMPUS LOCATIONS

NOTE: ADDITIONAL CAMPUSES FOR MORaine
PARK TECHNICAL COLLEGE ARE IN
FOND DU LAC AND DODGE COUNTIES.

CAMPUSES FOR LAKESHORE TECHNICAL
COLLEGE ARE IN MANITOWOC AND
SHEBOYGAN COUNTIES



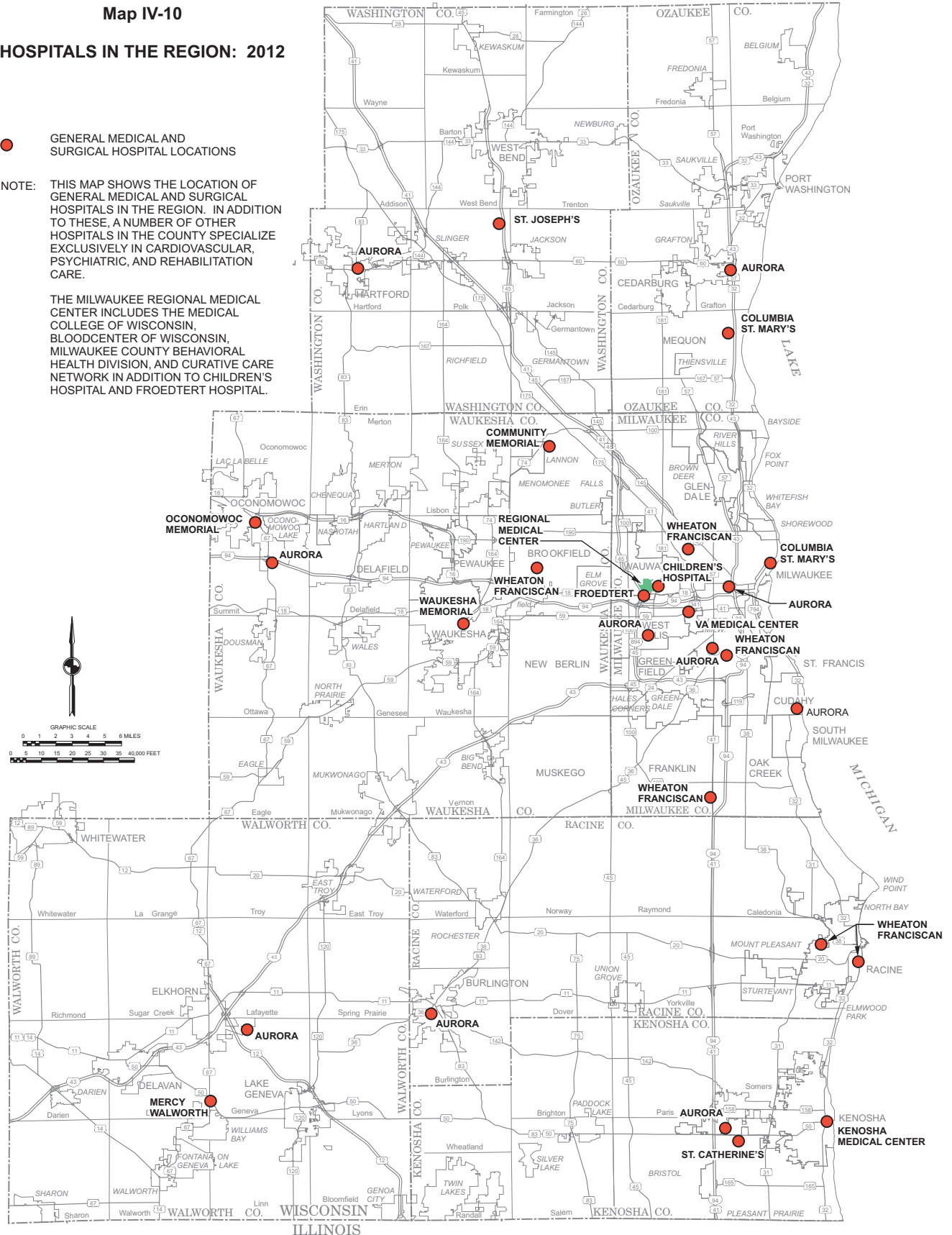
Source: Wisconsin Technical College System and SEWRPC.

Map IV-10
HOSPITALS IN THE REGION: 2012

● GENERAL MEDICAL AND SURGICAL HOSPITAL LOCATIONS

NOTE: THIS MAP SHOWS THE LOCATION OF GENERAL MEDICAL AND SURGICAL HOSPITALS IN THE REGION. IN ADDITION TO THESE, A NUMBER OF OTHER HOSPITALS IN THE COUNTY SPECIALIZE EXCLUSIVELY IN CARDIOVASCULAR, PSYCHIATRIC, AND REHABILITATION CARE.

THE MILWAUKEE REGIONAL MEDICAL CENTER INCLUDES THE MEDICAL COLLEGE OF WISCONSIN, BLOODCENTER OF WISCONSIN, MILWAUKEE COUNTY BEHAVIORAL HEALTH DIVISION, AND CURATIVE CARE NETWORK IN ADDITION TO CHILDREN'S HOSPITAL AND FROEDTERT HOSPITAL.



Source: Wisconsin Hospital Association and SEWRPC.

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY FOR SOUTHEASTERN WISCONSIN: 2015 - 2020

Chapter V

REGIONAL ECONOMY

INTRODUCTION

Current and historic information on the economy of the Southeastern Wisconsin Region is essential to the preparation of an economic development strategy for the Region. This chapter presents current and historic information on the regional economy including information on the labor force, employment, and wages and income. Long-range projections of employment are also presented. For comparison, data are presented for the State of Wisconsin and the Nation, where appropriate.

LABOR FORCE

Size of the Labor Force

The labor force is the segment of the resident population which most closely can be related to the economy of an area. The civilian labor force of an area consists of all of its residents 16 years of age or over who are either employed or who are unemployed, available for work, and seeking employment. “Local Area Unemployment Statistics” (LAUS) data, compiled by the U.S. Bureau of Labor Statistics and the Wisconsin Department of Workforce Development, is the most commonly used statistical measure of the labor force. LAUS data pertain to the civilian non-institutional population.

The size of the labor force in the Region over the past two decades, as reported in the LAUS data, is shown on Figure V-1. The Region’s labor force increased steadily during the 1990s, reaching a level of about 1,047,600 persons by 1999. Since then, the size of the labor force has fluctuated somewhat, between a low 1,023,800 persons in 2004 and a high of 1,050,300 persons in 2007 (see Table V-1). The Region’s labor force stood at 1,032,400 persons in 2010, representing about 34 percent of the labor force in Wisconsin.

Unemployment Rate

The unemployment rate in the Region for the years 1990 through 2010, as reported in the LAUS data, is shown on Figure V-2. Between 1990 and 2008, unemployment ranged between about 3 and 6 percent. The Region unemployment rate increased to about 9 percent in 2009 and 2010 as a result of the economic recession. The regional unemployment rate was slightly below the national rate and slightly above the rate for Wisconsin in 2010.

Information from the American Community Survey (ACS), compiled by the U.S. Bureau of the Census, indicates that the unemployment rate varies by race and ethnicity. In Milwaukee County, which accounts for a substantial portion of the racial-ethnic minority population in the Region, the unemployment rate for the non-

Hispanic White population was just under 8 percent in 2010. This compares to about 23 percent for the African American population and about 18 percent for the Hispanic population. Similar patterns are found in the unemployment rates for Wisconsin and the Nation (see Table V-2).

It should be noted that the unemployment rate is criticized by some as understating the actual extent of unemployment problems—particularly insofar as it does not reflect the unemployed who have given up looking for work because of the tight job market, because they lack a means of transportation to outlying job centers, because of high child-care costs, or for other reasons. In addition, the unemployment rate does not measure the extent of underemployment among those who have no choice other than to take a job below their training/skill level.

Place of Work

Information regarding the place of work of the employed labor force, taken from the American Community Survey for the years 2006 through 2010, is presented in Table V-3. These data indicate that of the workers who resided in the Region in 2010, about 915,637, or 94 percent, worked in the Region while about 53,663, or 6 percent, worked outside the Region. About 58,642 workers commuted from outside the Region to jobs within the Region. County-to-county worker commuting patterns within the Region are also indicated in Table V-3. Within the Region, the largest volume of inter-county commuting to work occurs from Milwaukee County to Waukesha County.

EMPLOYMENT

Number of Jobs

The number of employment opportunities, or jobs, in an area is an important measure of the size of an area's economy. The total number of jobs, including wage and salary employment and the self-employed, as reported by the U.S. Bureau of Economic Analysis (BEA), is shown for the Region on Figure V-3. The total number of jobs is presented for the years 1990 through 2009. As shown on Figure V-3, employment in the Region increased steadily during the 1990s, reaching a level of 1.21 million jobs in the year 2000. Following a decrease during the early 2000s, employment again increased steadily, reaching a level of about 1.24 million jobs in 2007 and 2008. Employment in the Region decreased significantly from 2008 to 2009, to a level of about 1.18 million jobs, owing to the economic recession.

Also shown on Figure V-3 is the number of jobs in the Region that are covered by unemployment insurance programs, as reported in the Quarterly Census of Employment and Wages (QCEW). Prepared through a joint effort by the Wisconsin Department of Workforce Development and the U.S. Bureau of Labor Statistics, the QCEW employment data is more current than the BEA employment data. The QCEW data typically accounts for about 80 percent of total employment; it does not include the self-employed and other jobs not covered by unemployment insurance programs. The QCEW data also indicates a significant decrease in the number of jobs in the Region between 2008 and 2009—attributable to the economic recession—and indicates a continued, though less steep, decrease between 2009 and 2010 (also see Table V-4).

The distribution of employment among the Region's seven counties has changed over the decades (see Figure V-4). Between 1970 and 2009, Milwaukee County's share of total regional employment decreased from about 67 percent to about 49 percent. Racine County experienced a slight decrease in its share of regional employment between 1970 and 2009, while the five other counties in the Region experienced at least a slight increase. The largest increase in this respect occurred in Waukesha County; its share of employment in the Region increased from about 10 percent in 1970 to about 23 percent in 2009.

Under the regional planning program, the largest concentrations of employment, or jobs, within the Region have been identified as "major economic activity centers." These are defined as areas containing a concentration of commercial and/or industrial land having at least 3,500 total jobs or 2,000 retail jobs. The location of economic activity centers in the Region, based on year 2010 employment levels, is shown on Map V-1.

Jobs by Industry

The change in employment levels in the Region has been accompanied by a change in the industry mix of jobs. The breakdown of total jobs by industry in the Region as reported by the U.S. Bureau of Economic Analysis is presented for the years 2001 and 2009 in Table V-5.¹ The most significant changes between 2001 and 2009 are a decrease in the proportion of manufacturing jobs (from 16.7 percent in 2001 to 12.7 percent in 2009) and an increase in the proportion of service jobs (from 49.6 percent in 2001 to 54.9 percent in 2009). The shift from manufacturing to service industries represents a continuation of a long-term trend in the Region, a trend that goes back to at least 1970, when manufacturing accounted for 32 percent of all jobs in the Region. This trend in the Region parallels a similar long-term shift from manufacturing to service jobs for Wisconsin and the Nation overall.

Despite the decrease in manufacturing employment, the Region's percentage of jobs in manufacturing remains higher than the national and just slightly below the State. The Region's percentage of jobs in service industries is higher than the State and about the same as the Nation (see Table V-6).

Location Quotients: Leading Industries

Location quotients are ratios that facilitate the comparison of an area's employment mix by industry with that of another area—a "reference area." A location quotient is calculated as a locality's proportion of total employment in a given industry divided by the corresponding proportion for the larger reference area, usually the Nation. A location quotient greater than 1.0 for an industry indicates that a locality has a greater share of its employment in that industry than does the reference area. Location quotients are used as an indicator of the types of industries which tend to "lead or drive" a local economy.

This section presents location quotients for the Region using the Nation as the reference area. The location quotients presented in this section reflect private sector employment for NAICS industry subsectors, using employment data from the Quarterly Census of Employment and Wages (QCEW) for 2010. The QCEW employment data used here was compiled by the U.S. Bureau of Labor Statistics and presented in the Bureau's online location quotients calculator.

Table V-7 identifies those NAICS subsectors in the Region which have a location quotient of at least 1.1 and which account for at least 0.5 percent of the total employment of the Region. Most of these subsectors are in the manufacturing and service sectors. Representative employers within these manufacturing and service subsectors include the following:

- **Manufacturing:**

- NAICS 311—Food manufacturing (Patrick Cudahy, Palermo, Cargill)

- NAICS 322—Paper manufacturing (Western States Envelope and Label)

- NAICS 323—Printing and related support activities (QuadGraphics, Brady)

- NAICS 326—Plastics and rubber products manufacturing (Miniature Precision Components)

- NAICS 331—Primary metal manufacturing (Charter Wire, Signicast)

- NAICS 332—Fabricated metal products manufacturing (Ladish, Master Lock)

- NAICS 333—Machinery manufacturing (Joy Global, CNH, Briggs & Stratton)

- NAICS 334—Computer and electronic products manufacturing (General Electric)

- NAICS 335—Electrical equipment and appliance manufacturing (Rockwell Automation, Eaton, Generac)

¹The industry categories in Table V-5 reflect the North American Industry Classification System (NAICS), which has replaced the Standard Industrial Classification System. The U.S. Bureau of Economic Analysis reports employment by industry using NAICS categories at the county level since 2001.

- **Services:**

NAICS 518—Data processing, hosting and related services (FIS Management Services)

NAICS 524—Insurance carriers and related activities (Northwestern Mutual, West Bend Mutual, MGIC)

NAICS 551—Management of companies and enterprises (ManpowerGroup)

NAICS 611—Educational services (Marquette University, University of Wisconsin-Milwaukee, Milwaukee School of Engineering)

NAICS 624—Social assistance (Lutheran Social Services of Wisconsin and Upper Michigan)

Based in part on statistical analyses similar to that described above, the M7 organization has prepared a business plan designed to target six economic sectors that are believed to offer the best potential for growth, expansion, and attraction. These six sectors are:

- **Energy, power, and controls**, focusing on products and services related to electrical power distribution and industrial and building automation and controls.
- **Water technologies**, involving water quality and quantity, wastewater treatment, environmental engineering, and the manufacturing and distribution of pumps, valves, and other water related equipment.
- **Food and beverage production and manufacturing**, involving ingredients, processing, and food production.
- **Finance and insurance services**, focusing on insurance and money management.
- **Headquarters and business services**, particularly relating to information technology; data processing systems and services; distribution and supply chain systems; and medical information.
- **Medical technology, bioscience, and health services**, focusing on diagnostic equipment and botanical and pharmaceutical research, product development, and manufacturing.

Machinery Machinery manufacturing has also been identified as a driver industry, which supports or is part of most of the six key clusters through the manufacture of sophisticated machinery used in the power, energy efficiency, water treatment and distribution, medical, and food products industries, among others.

Printing was identified as a legacy cluster, with a potential to capture an increasing share of the consolidating printing market based on the cluster's regional concentration and levels of local expertise, supportive industry institutions, and access to Wisconsin's paper industry.

Employment Projections

Long-range employment projections for the Region are set forth in Table V-8. The projections for the year 2050 were prepared by SEWRPC in 2012-2013 as part of the VISION 2050 Land Use and Transportation System Plan for Southeastern Wisconsin. SEWRPC projections are intended to provide an indication of the overall long-term trend in employment, irrespective of shorter-term business cycle fluctuations. Projections are developed for the high-, intermediate-, and low-growth scenarios. Total employment in the Region is projected to increase from about 1.18 million jobs in 2010 to 1.54 million jobs in 2050 under the high-growth scenario, to 1.39 million jobs under the intermediate-growth scenario, and to 1.24 million jobs under the low-growth scenario.

Total employment in the Region would increase by about 210,300 jobs, or 18 percent, over the 40-year projection period, from 1,176,600 jobs in 2010 to 1,386,900 jobs in 2050, under the intermediate-growth scenario. It is important to recognize that employment in the Region was unusually low in 2010, the base year of the new projections, because of the national economic recession that began in late 2007. Total employment decreased by 62,000 jobs, or 5 percent, from an all-time high of 1,238,600 jobs in 2007. Projected total employment for the Region under the intermediate-growth scenario is 12 percent greater than the peak level of 2007.

Projections of future population and employment levels were closely coordinated to ensure consistency between the two. Table V-9 shows the size of the labor force in the Region that may be expected based on the

Commission's projected population and future labor force participation rates. The population projections developed for the VISION 2050 plan were based on consideration of the three components of population change, which are births, deaths, and migration. The population projections under the intermediate- and high-growth scenarios assume increases in in-migration to the Region during the planning period, which is a reversal of current trends. It is projected that the labor force would increase from 1,079,000 persons in 2010 to 1,287,400 persons in 2050 under the high-growth scenario, to 1,171,300 persons under the intermediate-growth scenario, and to 1,070,500 persons under the low-growth scenario. These projections indicate slower growth in the labor force than has occurred in the Region over the past 40 years. The expected reduced growth is directly related to the aging of the population, as a large segment of the workforce enters those age groups with lower labor force participation rates. The retirement of large numbers of "baby boomers" may be expected to dampen growth in the overall labor force in coming decades despite the fact that some seniors may work longer than in the past, which was assumed in the analysis.

Estimating the employment levels able to be accommodated by the labor force required that assumptions be made regarding unemployment and the extent of multiple job-holding. Unemployment rates of 4.0, 5.0, and 6.0 percent were assumed for the high-, intermediate-, and low-growth scenarios, respectively. These were deemed to be representative of the long-term average rates that could reasonably be expected under the three growth scenarios. The measure of multiple job-holding used in this analysis is the ratio between the total number of jobs in the Region and the employed labor force. A range of multiple job-holding factors from 1.19 to 1.27—consistent with the range observed in the Region between 1990 and 2010—was considered for each growth scenario.

Table V-9 also shows the range in the number of jobs that could potentially be accommodated by the projected population and associated labor force under the high-, intermediate-, and low-growth scenarios based on the foregoing assumptions. The projected year 2050 job levels in the Region under the high-, intermediate-, and low-growth scenarios are within these ranges. This indicates basic consistency between the projected employment levels and the projected population and associated labor force in the Region under each growth scenario.

WAGES AND INCOME

Wages

Information on wages from the Quarterly Census of Employment and Wages (QCEW) provides insight into rates of pay by industry. The QCEW wage data pertain to jobs covered by unemployment insurance programs; the data are reported on a place-of-work basis. QCEW wage data for the Region, Wisconsin, and the Nation is presented in Tables V-10 and V-11.

As indicated in Table V-10, the average annual wage in the Region was about \$44,000 in 2010, compared to about \$40,000 in Wisconsin and \$46,800 in the Nation. The increase in the average wage in the Region between 2000 and 2010, adjusted for inflation, was 4.3 percent, which was lower than the increases for the State and Nation.

As indicated in Table V-11, for a majority of the major industry groups, the average annual wage in the Region was lower than the average for the Nation. The exceptions are manufacturing and education/health services, where the average annual wage in the Region is similar to that of the Nation; and construction and utilities, where the average annual wage in the Region is notably higher.

Personal Income

Personal income is the income from all sources that is received by all individuals who live in an area and is thus considered place-of-residence data. Estimates of personal income are intended to include wage and salary income, proprietors' income, rental income, personal interest and dividend income, and personal transfer income. Per capita personal income is calculated as the aggregate personal income for an area divided by the resident population of the area.

Table V-12 shows the Region's per capita income was \$25,900 in 2010, which is about the same as per capita income for the State and Nation. Per capita income in the Region decreased by 11.3 percent during the 2000s (measured in constant dollars). Constant dollar per capita income for Wisconsin and the Nation also decreased. The Region's median family income was \$65,400 in 2010, which exceeded that of the State and Nation. Median family income (constant dollar) in the Region decreased by 11.0 percent during the 2000s, and also decreased for the State and the Nation.

Table V-13 shows there are considerable differences in personal income levels among the seven counties in the Region and between the Region's largest cities and their surrounding areas. Ozaukee County (\$39,000) and Waukesha County (\$34,900) had the highest per capita income levels among the Region's counties in 2010. Milwaukee County (\$22,400) had the lowest per capita income level, and the City of Milwaukee (\$17,900) had a significantly lower per capita income level than the remainder of Milwaukee County (\$29,500). Each of the Region's seven counties and four largest cities experienced a decrease in constant dollar per capita income during the 2000s. Median family income levels follow similar patterns.

Table V-14 shows there are also considerable differences in poverty levels among the seven counties in the Region and between the Region's largest cities and their surrounding areas. Ozaukee County (3.2 percent) had the lowest percentage of families in poverty among the Region's counties in 2010 and Milwaukee County (17.3 percent) had the highest. The Cities of Milwaukee, Racine, Kenosha, and Waukesha each had a significantly higher percentage of families in poverty than the remainders of their respective counties.

COMPARISON OF THE MILWAUKEE METROPOLITAN AREA TO ITS PEERS

A statistical comparison of the Milwaukee metropolitan area with other metropolitan areas was conducted to help assess how the area compares with similar areas around the nation. This effort involved a comparison of the Milwaukee "metropolitan statistical area" and 26 other metropolitan statistical areas. Metropolitan statistical areas are delineated by the U.S. Office of Management and Budget based largely on population size and density and travel patterns. In general, each metropolitan statistical area includes one or more counties containing an urban core area of at least 50,000 persons, as well as adjacent counties that have a high degree of social and economic integration with the urban core.

The Milwaukee metropolitan statistical area (MSA) includes four of the seven counties that comprise the Southeastern Wisconsin Region—Milwaukee, Ozaukee, Washington, and Waukesha. The Milwaukee MSA, which had an estimated population of 1.57 million persons in 2013, was compared to the 13 other metropolitan statistical areas located in the Midwest (within 500 miles of Milwaukee) that have a population of at least 1.0 million persons. In addition, the Milwaukee area was compared to 13 other metropolitan statistical areas having a population of at least 1.0 million persons distributed throughout the nation. Economic data from a report prepared by SEWRPC is summarized below. The full report is available at:

<http://www.sewrpc.org/SEWRPCFiles/LUTranSysPlanning/2015-04-22-mtg/VISION2050-MetroAreaComparisonMemoReport-Appendix00223479-2.PDF>

Overview (Tables V-15 and 16)

The recession of the late 2000s had a significant impact on job trends throughout the nation. While some metro areas, particularly areas outside the Midwest, have seen job growth, for other areas (including Milwaukee) job levels in 2013 remain below the levels of 2001. Milwaukee's job loss is among the worst for Midwest metro areas, and is the worst among the other metro areas. Nevertheless, the Milwaukee MSA and most other metro areas saw an increase in constant dollar gross domestic product (GDP) since 2001, with more rapid growth generally occurring in the metro areas outside the Midwest. Milwaukee's GDP on a per capita basis is above the average for both the Midwest and the other metro areas. Manufacturing remains a key sector of Milwaukee's economic base, with the Milwaukee MSA's proportion of manufacturing jobs the highest among all metro areas considered.

Tables V-15 and V-16 present the total population and number of jobs in each MSA. The Milwaukee MSA ranked 12th for both population and jobs among MSAs in the Midwest. Nationwide, the Milwaukee MSA ranked 7th in population and 6th in jobs.

Change in Jobs (Table V-17)

As noted above, the trend in the number of jobs throughout the nation was significantly impacted by the recession of the late 2000s. In the Milwaukee area, the number of jobs in 2013 was 4.6 percent below the level in 2001. Milwaukee was among a majority of metro areas in the Midwest where job levels in 2013 remained below 2001 jobs levels.

Job growth has generally been stronger in the metro areas outside the Midwest. Despite the recession, 10 of these metro areas experienced job increases of 4 to 22 percent between 2001 and 2013.

Unemployment Rate (Table V-18)

The Milwaukee metro area unemployment rate stood at 7.3 percent in 2013, down from the recessionary high level of 8.9 percent in 2009 and 2010. The Milwaukee area's rate in 2013 was about the same as the average for the Midwest metro areas (7.2 percent) and just slightly higher than the average for the metro areas outside the Midwest (6.9 percent).

Personal Income (Table V-19)

Milwaukee's annual per capita income of \$29,069 in 2013 was close to the average for the Midwest metro areas (\$29,232) and slightly higher than the average for the other metro areas (\$28,405).

Gross Domestic Product (Tables V-20 to V-22)

Nearly all of the metro areas considered experienced an increase in gross domestic product (the market value of all goods and services produced) between 2001 and 2013, adjusted for inflation. GDP growth in metro areas across the nation was more robust than the Midwest. The Milwaukee area increase of 13.6 percent in GDP ranked near the middle among the Midwest metro areas and in the lower half among the other metro areas. In 2013, GDP in the Milwaukee MSA was over \$94 billion.

The Milwaukee metro area gross domestic product on a per capita basis was relatively high compared to many Midwest and other metro areas. The Milwaukee metro area per capita GDP of \$60,100 in 2013 ranked fourth highest among both Midwest metro areas (where the average was \$56,900) and the other metro areas (where the average was \$55,200).

Manufacturing Sector (Tables V-23 to V-25)

Manufacturing has historically been a key component of the economic base in the Milwaukee metro area. As in other metro areas, the share of jobs in manufacturing relative to total jobs in the Milwaukee metro area has decreased. Despite the reduction, manufacturing employment continues to account for 15.0 percent of all jobs in the Milwaukee area (2013). This ranks highest among both the Midwest metro areas and the metro areas outside the Midwest, where the average shares were 10.3 percent and 7.4 percent, respectively.

About 16.5 percent of the Milwaukee metro area gross domestic product was related to manufacturing in 2013. This compares to the average of 14.5 percent for the Midwest metro areas and 12.4 percent for the other metro areas.

SUMMARY

As background information for the preparation of an economic development strategy for Southeastern Wisconsin Region, this chapter presents information on economy of the Region, including information on the labor force, employment or jobs, the structure of the economy, and income and wages. The following summarizes the information presented in this chapter.

Labor Force

- The Region's labor force—defined as residents at least 16 years old who are either employed or who are unemployed, available for work, and seeking employment—stood at about 1,032,400 persons in 2010. This represents a decrease of about 17,900 from its peak in 2007—a reflection of the recent economic recession.
- For much of the last two decades, the Region's unemployment rate was under 6 percent. As a result of the recent economic recession, however, the unemployment rate increased to 9 percent in 2009 and 2010. The unemployment rates for minority populations in the region are substantially higher. The regional unemployment rate was slightly below the national rate and slightly above the rate for Wisconsin in 2010.
- About 94 percent of the employed residents of the Region worked in the Region in 2010, the remainder commuting largely to adjacent counties. About 6 percent of those who worked in the Region resided outside the Region. Within the Region, the largest volume of inter-county commuting to work occurs between Milwaukee and Waukesha Counties.

Employment

- An important measure of the size of an area's economy is the number of employment opportunities or jobs. Employment within the Region reached a high of about 1.24 million jobs in 2007 and 2008. The employment level decreased to about 1.18 million jobs in 2009, the direct result of the economic recession.
- During the last decade, the Region continued to experience a shift from manufacturing to service sector jobs. The proportion of jobs in the manufacturing sector decreased from 16.7 percent to 12.7 percent, while the proportion of jobs in the service sector increased from 49.6 percent to 54.7 percent. This represents a continuation of a long-term trend in the Region and parallels a similar long-term shift from manufacturing to service jobs for Wisconsin and the Nation overall.
- The long-range projections of the Regional Planning Commission indicate that total employment in the Region may be expected to increase to about 1.39 million jobs by the year 2050, an increase of about 210,300 jobs, or 18 percent, over 2010. Each county in the Region is projected to experience job growth between 2010 and 2050.

Structure of the Economy

- Based on the calculation of location quotients—that is, comparing a particular locality's proportion of total employment in a given industry to the corresponding proportion for the Nation—the leading manufacturing industries in the Region include food processing; paper; printing; plastics and rubber products; primary metal; fabricated metal products; manufacturing machinery; computer and electronic products; and electrical equipment and appliances. The leading service sector industries include data processing; insurance and related activities; management of companies and enterprises; educational services; and social assistance.
- Manufacturing has historically been a key component of the economic base in the Milwaukee metro area. As in other metro areas across the nation, the share of jobs in manufacturing relative to total jobs in the Milwaukee metro area has decreased. Despite the reduction, manufacturing employment accounted for 15.0 percent of all jobs in the Milwaukee area in 2013. This ranks highest among both Midwest metro areas and the metro areas outside the Midwest, where the average shares were 10.3 percent and 7.4 percent, respectively.
- The M7 organization has prepared a regional framework plan designed to target six economic sectors that are believed to offer the best potential for growth, expansion, and attraction. These six sectors are: energy, power, and controls; food and beverage production and manufacturing; water technologies; finance and insurance services; headquarters and business services; and medical technology, bioscience, and health

services. Machinery manufacturing has also been identified as a driver industry that supports other key economic clusters, and printing has been identified as a legacy cluster with potential to grow in coming years.

Wages and Income

- The average annual wage in the Region was about \$44,000 in 2010, compared to \$46,800 in the Nation. For a majority of the major industry groups, the average annual wage in the Region was lower than the Nation. The exceptions are manufacturing and education/health services—where the average annual wage in the Region is similar that of the Nation—and construction and utilities—where the average annual wage in the Region is notably higher.
- Per capita income in the Region was about \$44,000 in 2010, compared to about \$40,000 for Wisconsin and about \$46,800 for the Nation. Adjusted for inflation, per capita income in the Region decreased by about 11.3 percent between 2000 and 2010. Per capita income for Wisconsin and the Nation also decreased during the 2000s. Milwaukee’s annual per capita income of \$29,069 in 2013 was close to the average for similarly-sized Midwest metro areas (\$29,232) and slightly higher than the average for similarly-sized metro areas around the nation (\$28,405).
- There are considerable differences in poverty levels among the seven counties in the Region and between the Region’s largest cities and their surrounding areas. Ozaukee County had the lowest percentage of families in poverty among the Region’s counties in 2010 and Milwaukee County had the highest. The Cities of Milwaukee, Racine, Kenosha, and Waukesha each had a significantly higher percentage of families in poverty than the remainders of their respective counties.

**Table V-1
CIVILIAN LABOR FORCE IN THE NATION, WISCONSIN, AND THE REGION: 1990 AND 2000-2010**

	1990	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Nation												
Civilian Labor Force	125,840,000	142,583,000	143,734,000	144,863,000	146,510,000	147,401,000	149,320,000	151,428,000	153,124,000	154,287,000	154,142,000	153,889,000
Employed	118,793,000	136,891,000	136,933,000	136,485,000	137,736,000	139,252,000	141,730,000	144,427,000	146,047,000	145,362,000	139,877,000	139,064,000
Unemployed	7,047,000	5,692,000	6,801,000	8,378,000	8,774,000	8,149,000	7,591,000	7,001,000	7,078,000	8,924,000	14,265,000	14,825,000
Unemployment Rate	5.6	4.0	4.7	5.8	6.0	5.5	5.1	4.6	4.6	5.8	9.3	9.6
Wisconsin												
Civilian Labor Force	2,598,898	2,996,091	3,030,998	3,021,068	3,033,674	3,020,402	3,035,808	3,077,096	3,099,456	3,087,331	3,100,503	3,062,636
Employed	2,486,129	2,894,884	2,897,937	2,860,915	2,862,587	2,868,376	2,890,117	2,932,482	2,951,001	2,936,749	2,829,348	2,807,301
Unemployed	112,769	101,207	133,061	160,153	171,087	152,026	145,691	144,614	148,455	150,582	271,155	255,335
Unemployment Rate	4.3	3.4	4.4	5.3	5.6	5.0	4.8	4.7	4.8	4.9	8.7	8.3
Region												
Civilian Labor Force	945,048	1,042,706	1,044,062	1,033,164	1,030,444	1,023,813	1,024,575	1,037,987	1,050,258	1,046,427	1,045,043	1,032,355
Employed	904,584	1,004,963	994,988	973,401	966,983	967,835	972,014	986,630	997,575	993,254	948,670	939,223
Unemployed	40,464	37,743	49,074	59,763	63,461	55,978	52,561	51,357	52,683	53,173	96,373	93,132
Unemployment Rate	4.3	3.6	4.7	5.8	6.2	5.5	5.1	4.9	5.0	5.1	9.2	9.0
Kenosha County												
Civilian Labor Force	66,515	81,166	81,682	81,376	82,063	82,079	82,774	83,251	84,708	85,292	86,199	85,037
Employed	62,488	77,925	77,519	76,523	76,960	77,285	78,034	78,790	80,456	80,650	77,028	75,875
Unemployed	4,027	3,241	4,163	4,853	5,103	4,794	4,740	4,461	4,252	4,642	9,171	9,162
Unemployment Rate	6.1	4.0	5.1	6.0	6.2	5.8	5.7	5.4	5.0	5.4	10.6	10.8
Milwaukee County												
Civilian Labor Force	477,049	478,376	475,983	467,617	463,069	456,447	453,562	457,573	471,395	468,565	467,762	463,595
Employed	455,072	458,091	450,598	436,867	430,573	427,655	427,163	431,794	444,691	442,090	422,751	418,977
Unemployed	21,977	20,285	25,385	30,750	32,496	28,792	26,399	25,839	26,704	26,475	44,011	44,618
Unemployment Rate	4.6	4.2	5.3	6.6	7.0	6.3	5.8	5.6	5.7	5.7	9.6	9.6
Ozaukee County												
Civilian Labor Force	41,334	47,697	47,926	47,477	47,567	47,451	47,895	48,806	48,040	47,861	47,571	46,751
Employed	40,038	46,517	46,308	45,413	45,329	45,698	46,099	47,062	46,244	46,019	43,552	43,552
Unemployed	1,296	1,180	1,618	2,064	2,238	1,753	1,796	1,744	1,796	1,842	3,626	3,199
Unemployment Rate	3.1	2.5	3.4	4.3	4.7	3.7	3.7	3.6	3.7	3.8	7.6	6.8
Racine County												
Civilian Labor Force	90,168	99,858	100,007	99,314	99,381	99,273	99,006	99,983	100,617	99,726	99,431	98,046
Employed	86,032	95,976	94,493	92,969	92,409	93,286	93,074	94,354	94,842	93,961	89,067	88,256
Unemployed	4,136	3,882	5,514	6,345	6,972	5,987	5,932	5,629	5,775	5,765	10,364	9,790
Unemployment Rate	4.6	3.9	5.5	6.4	7.0	6.0	6.0	5.6	5.7	5.8	10.4	10.0
Walworth County												
Civilian Labor Force	41,876	54,173	55,175	55,523	56,019	55,999	56,138	56,407	56,295	56,451	56,194	54,913
Employed	40,739	52,619	53,049	52,846	53,310	53,531	53,757	53,988	53,753	53,774	51,009	50,058
Unemployed	1,137	1,554	2,126	2,677	2,709	2,468	2,381	2,419	2,542	2,677	5,185	4,855
Unemployment Rate	2.7	2.9	3.9	4.8	4.8	4.4	4.2	4.3	4.5	4.7	9.2	8.8
Washington County												
Civilian Labor Force	53,769	70,096	70,841	70,426	70,730	71,212	72,329	74,373	74,133	74,368	74,842	73,465
Employed	51,743	68,157	68,150	67,053	67,015	68,004	69,277	71,313	71,013	71,139	68,217	67,608
Unemployed	2,026	1,939	2,691	3,373	3,715	3,208	3,052	3,060	3,120	3,229	6,625	5,857
Unemployment Rate	3.8	2.8	3.8	4.8	5.3	4.5	4.2	4.1	4.2	4.3	8.9	8.0
Waukesha County												
Civilian Labor Force	174,337	211,340	212,448	211,431	211,615	211,352	212,871	217,594	215,070	214,164	213,044	210,548
Employed	168,472	205,678	204,871	201,730	201,387	202,376	204,610	209,389	206,576	205,621	196,653	194,897
Unemployed	5,865	5,662	7,577	9,701	10,228	8,976	8,261	8,205	8,494	8,543	16,391	15,651
Unemployment Rate	3.4	2.7	3.6	4.6	4.8	4.2	3.9	3.8	3.9	4.0	7.7	7.4

Source: Wisconsin Department of Workforce Development in conjunction with the U.S. Bureau of Labor Statistics (Local Area Unemployment Statistics); and SEWRPC.

Table V-2

**UNEMPLOYMENT RATE IN THE NATION, WISCONSIN,
AND MILWAUKEE COUNTY: 2007 TO 2010**

Place and Race/Ethnicity	Unemployment Rate			
	2007	2008	2009	2010
United States				
White, Non-Hispanic.....	5.2	5.2	8.4	9.1
Black or African American	12.0	11.7	16.1	17.9
Hispanic	7.3	7.5	11.9	12.9
Wisconsin				
White, Non-Hispanic.....	4.8	4.5	7.1	7.8
Black or African American	17.4	13.0	19.5	22.3
Hispanic	7.3	8.0	13.3	14.0
Milwaukee County				
White, Non-Hispanic.....	4.9	4.7	7.1	7.6
Black or African American	17.5	13.0	19.4	23.4
Hispanic	8.7	8.4	15.6	17.8

NOTES: White, non-Hispanic includes those persons who indicate that they are white and no other race, and that they are not of Hispanic origin. Black or African American includes those persons who indicate they are black or African American and no other race; they may be of Hispanic origin. Hispanic includes persons of any race who indicate they are of Hispanic origin.

Source: U.S. Bureau of the Census (American Community Survey) and SEWRPC.

Table V-3

REGIONAL LABOR FORCE (NUMBER OF WORKERS) BY PLACE OF WORK AND PLACE OF RESIDENCE: 2006-2010

County of Residence	County of Work								Outside Region	Total
	Kenosha	Milwaukee	Ozaukee	Racine	Walworth	Washington	Waukesha	Subtotal		
Kenosha	42,111	3,256	90	7,762	992	14	1,004	55,229	23,023	78,252
Milwaukee	1,760	350,824	7,825	4,787	748	4,378	57,087	427,409	6,903	434,312
Ozaukee	58	14,515	22,255	89	36	1,932	3,164	42,049	2,348	44,397
Racine	6,668	15,196	111	59,121	1,548	132	4,634	87,410	3,416	90,826
Walworth	1,233	2,761	52	2,150	32,283	93	3,892	42,464	8,669	51,133
Washington	64	14,123	4,618	222	17	34,044	12,998	66,086	3,292	69,378
Waukesha	554	61,602	1,624	2,090	1,245	3,501	124,374	194,990	6,012	201,002
Subtotal	52,448	462,277	36,575	76,221	36,869	44,094	207,153	915,637	53,663	969,300
Outside Region	5,796	15,000	3,479	2,080	8,273	7,957	16,057	58,642	--	--
Total	58,244	477,277	40,054	78,301	45,142	52,051	223,210	974,279	--	--

Source: U.S. Bureau of the Census (American Community Survey) and SEWRPC.

Table V-4

TOTAL EMPLOYMENT (JOBS) IN THE NATION, WISCONSIN, AND THE REGION: 1990 AND 2000-2010

Employment	1990	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total Employment												
Nation.....	135,612,900	163,303,800	163,439,200	162,966,100	163,909,500	166,944,700	170,525,400	174,084,600	177,857,700	177,564,900	172,107,800	171,651,400
Wisconsin.....	2,789,194	3,385,764	3,367,605	3,375,509	3,395,972	3,449,819	3,492,523	3,534,076	3,569,845	3,560,172	3,437,063	3,428,141
Region.....	1,054,032	1,209,816	1,195,980	1,187,189	1,188,673	1,203,457	1,213,777	1,227,107	1,238,599	1,236,799	1,183,802	1,176,600
Kenosha County.....	51,810	67,867	67,359	68,642	71,953	74,182	75,842	75,915	76,116	76,160	73,257	74,900
Milwaukee County.....	604,673	618,333	609,884	599,495	593,044	592,466	592,850	598,908	604,972	605,790	580,986	575,400
Ozaukee County.....	35,065	50,444	50,439	49,255	49,527	51,260	51,928	52,586	54,157	54,119	52,003	52,500
Racine County.....	88,932	93,773	91,719	91,153	91,144	92,884	93,245	93,701	93,727	93,224	88,606	88,300
Walworth County.....	39,616	51,196	51,114	52,004	52,793	54,003	54,711	55,229	55,327	55,237	52,422	52,700
Washington County.....	45,805	60,298	60,338	61,422	62,475	64,091	65,999	67,009	68,191	67,422	64,175	63,900
Waukesha County.....	188,131	267,905	265,127	265,218	267,737	274,571	279,202	283,759	286,109	284,847	272,353	268,900
Employment Covered by Unemployment Insurance												
Nation.....	108,603,565	129,877,063	129,635,800	128,233,919	127,795,827	129,278,176	131,571,623	133,833,834	135,366,106	134,805,659	128,607,842	127,820,442
Wisconsin.....	2,217,507	2,737,382	2,717,019	2,690,099	2,687,893	2,712,890	2,741,183	2,764,813	2,777,629	2,768,823	2,641,611	2,630,246
Region.....	877,824	1,008,818	998,835	979,924	974,646	973,997	981,658	989,430	995,467	990,238	938,326	931,065
Kenosha County.....	40,185	51,038	50,405	50,720	51,602	52,961	55,591	54,973	54,656	54,615	51,952	53,150
Milwaukee County.....	519,566	528,923	521,349	506,872	499,055	491,924	490,157	492,848	496,522	496,056	471,426	465,103
Ozaukee County.....	26,323	39,975	38,771	38,328	37,753	37,140	37,838	38,156	38,864	38,769	36,801	37,404
Racine County.....	74,304	79,185	77,056	75,620	75,215	75,879	75,931	76,059	75,877	75,358	71,032	71,032
Walworth County.....	29,328	38,612	38,358	38,431	38,798	39,405	40,062	40,196	40,104	40,022	37,087	37,142
Washington County.....	34,999	48,113	48,217	48,235	48,809	49,809	51,566	52,337	53,025	52,272	49,180	48,621
Waukesha County.....	153,119	222,972	224,679	221,718	223,414	226,879	230,513	234,861	236,419	233,146	220,848	218,613

NOTE: Excludes military jobs.

Source: Total Jobs—U.S. Bureau of Economic Analysis (Regional Economic Accounts) Jobs Covered by Unemployment Insurance—Wisconsin Department of Workforce Development in conjunction with U.S. Bureau of Labor Statistics (Quarterly Census of Employment and Wages)

Table V-5

TOTAL EMPLOYMENT (JOBS) BY MAJOR CATEGORY IN THE REGION: 2001 AND 2009

Industry	2001		2009	
	Number	Percent of Total	Number	Percent of Total
Private employment				
Agriculture	5,840	0.5	5,232	0.4
Construction	54,127	4.5	49,905	4.2
Manufacturing	200,097	16.7	150,472	12.7
Wholesale trade	55,387	4.6	51,222	4.3
Retail trade	127,620	10.7	119,626	10.1
Services				
Information.....	25,007	2.1	21,044	1.8
Finance and insurance	63,914	5.3	69,531	5.9
Real estate and rental and leasing.....	33,620	2.8	43,339	3.7
Professional, scientific, and technical services	60,873	5.1	65,009	5.5
Management of companies and enterprises	16,882	1.4	23,637	2.0
Administrative and waste services	73,545	6.1	67,561	5.7
Educational services.....	28,127	2.4	36,462	3.1
Health care and social assistance.....	133,512	11.2	153,391	12.9
Arts, entertainment, and recreation.....	21,040	1.8	25,608	2.2
Accommodation and food services	74,908	6.3	79,573	6.7
Other services, except public administration.....	61,283	5.1	62,572	5.3
Services Subtotal.....	592,711	49.6	647,727	54.8
Other ^a	42,565	3.6	41,486	3.5
Government employment ^b	117,633	9.8	118,132	10.0
Total	1,195,980	100.0	1,183,802	100.0

^aIncludes transportation and warehousing, utilities, mining, forestry, and fishing.

^bExcludes military.

Source: U.S. Bureau of Economic Analysis (Regional Economic Accounts) and SEWRPC.

Table V-6

TOTAL EMPLOYMENT (JOBS) IN THE NATION, WISCONSIN, AND THE REGION BY MAJOR CATEGORY: 2009

Industry	Region		Wisconsin		United States	
	Number	Percent of Total	Number	Percent of Total	Number	Percent of Total
Private employment						
Agriculture	5,232	0.4	92,515	2.7	2,634,000	1.5
Construction	49,905	4.2	167,508	4.9	9,526,900	5.5
Manufacturing	150,472	12.7	451,930	13.1	12,489,200	7.3
Wholesale trade	51,222	4.3	126,208	3.7	6,151,300	3.6
Retail trade	119,626	10.1	374,188	10.9	17,889,800	10.4
Services						
Information.....	21,044	1.8	54,928	1.6	3,317,300	1.9
Finance and insurance	69,531	5.9	189,578	5.5	9,476,800	5.5
Real estate and rental and leasing.....	43,339	3.7	116,022	3.4	7,530,200	4.4
Professional, scientific, and technical services	65,009	5.5	156,895	4.6	11,757,800	6.8
Management of companies and enterprises	23,637	2.0	48,336	1.4	2,021,300	1.2
Administrative and waste services	67,561	5.7	154,922	4.5	10,121,000	5.9
Educational services.....	36,462	3.1	64,500	1.9	3,958,200	2.3
Health care and social assistance.....	153,391	12.9	393,212	11.4	18,770,700	10.9
Arts, entertainment, and recreation.....	25,608	2.2	66,029	1.9	3,753,100	2.2
Accommodation and food services	79,573	6.7	238,854	6.9	11,990,500	7.0
Other services, except public administration.....	62,572	5.3	179,265	5.2	10,016,700	5.8
Services Subtotal.....	647,727	54.8	1,662,541	48.3	92,713,600	53.9
Other ^a	41,486	3.5	143,468	4.2	8,098,000	4.7
Government employment ^b	118,132	10.0	418,705	12.2	22,605,000	13.1
Total	1,183,802	100.0	3,437,063	100.0	172,107,800	100.0

^aIncludes transportation and warehousing, utilities, mining, forestry, and fishing.

^bExcludes military.

Source: U.S. Bureau of Economic Analysis (Regional Economic Accounts) and SEWRPC.

Table V-7

LOCATION QUOTIENTS FOR THE REGION RELATIVE TO WISCONSIN AND THE NATION: 2010

Industry Subsector	Percent of Total Jobs in Region	Percent of Total Jobs in Wisconsin	Percent of Total Jobs in U.S.	Location Quotient: Region Relative to Wisconsin	Location Quotient: Region Relative to U.S.
Manufacturing					
NAICS 311 Food manufacturing	1.59	2.67	1.36	0.60	1.17
NAICS 322 Paper manufacturing	0.55	1.42	0.37	0.39	1.49
NAICS 323 Printing and related support activities	1.42	1.27	0.46	1.12	3.09
NAICS 326 Plastics and rubber products manufacturing	1.01	1.24	0.59	0.81	1.71
NAICS 331 Primary metal manufacturing	0.68	0.68	0.34	1.00	2.00
NAICS 332 Fabricated metal product manufacturing	2.94	2.84	1.20	1.04	2.45
NAICS 333 Machinery manufacturing	2.88	2.62	0.93	1.10	3.10
NAICS 334 Computer and electronic product manufacturing	1.34	0.89	1.03	1.51	1.30
NAICS 335 Electrical equipment and appliance manufacturing	1.53	0.93	0.34	1.65	4.50
NAICS 339 Miscellaneous manufacturing	0.68	0.60	0.53	1.13	1.28
Wholesale Trade					
NAICS 423 Merchant wholesalers, durable goods	3.16	2.73	2.56	1.16	1.23
Transportation and Warehousing					
NAICS 485 Transit and ground passenger transportation	0.74	0.63	0.39	1.17	1.90
Services					
NAICS 518 Data processing, hosting and related services	0.57	0.36	0.23	1.58	2.48
NAICS 524 Insurance carriers and related activities	2.37	2.80	1.92	0.85	1.23
NAICS 551 Management of companies and enterprises	2.83	2.09	1.75	1.35	1.62
NAICS 611 Educational services	2.69	1.47	2.32	1.83	1.16
NAICS 624 Social assistance	3.27	2.65	2.32	1.30	1.41

NOTES: This table lists NAICS subsectors in the Southeastern Wisconsin Region which have a location quotient relative to the U.S. of at least 1.1 and account for at least 0.5 percent of all jobs in the Region.
The employment data in this table pertain to private sector employment only.

Source: U.S. Bureau of Labor Statistics (Location Quotient Calculator, based upon employment data from the Quarterly Census of Employment and Wages); and SEWRPC.

Table V-8

**PROJECTED EMPLOYMENT
(JOBS) IN THE REGION: 2010-2050**

Area	Jobs			Change 2010-2035		Change 2010-2050	
	Actual 2010	Projected 2035	Projected 2050	Number	Percent	Number	Percent
Region	1,176,600	1,308,000	1,386,900	131,400	11.2	210,300	17.9
Kenosha	74,900	91,400	101,300	16,500	22.0	26,400	35.2
Milwaukee	575,400	596,300	608,900	20,900	3.6	33,500	5.8
Ozaukee	52,500	63,000	69,300	10,500	20.0	16,800	32.0
Racine	88,300	103,300	112,300	15,000	17.0	24,000	27.2
Walworth	52,700	63,100	69,300	10,400	19.7	16,600	31.5
Washington	63,900	78,600	87,400	14,700	23.0	23,500	36.8
Waukesha	268,900	312,300	338,400	43,400	16.1	69,500	25.8

NOTE: Projections for 2050 are based on the intermediate growth scenario developed for the VISION 2050 Regional Land Use and Transportation System Plan for Southeastern Wisconsin. Projections for the year 2035 are based on a "straight-line" calculation from actual 2010 job levels to those projected for the year 2050.

Source: U.S. Bureau of Economic Analysis and SEWRPC.

Table V-9

ESTIMATED NUMBER OF JOBS ABLE TO BE ACCOMMODATED BY THE PROJECTED POPULATION AND ASSOCIATED LABOR FORCE IN THE REGION AND COMPARISON TO THE PROJECTED NUMBER OF JOBS: 2050

Growth Scenario	Projected Population: 2050	Projected Labor Force: 2050	Assumed Unemployment Rate: 2050	Multiple Job-holding Factor— Assumed Range: 2050		Jobs Able to be Accommodated by Projected Labor Force: 2050		Projected Jobs: 2050
				From	To	From	To	
High	2,577,700	1,287,400	4.0	1.194	1.268	1,475,700	1,567,100	1,544,600
Intermediate.....	2,354,000	1,171,300	5.0	1.194	1.268	1,328,600	1,410,900	1,386,900
Low	2,159,800	1,070,500	6.0	1.194	1.268	1,201,500	1,276,000	1,240,400

Source: SEWRPC.

Table V-10

AVERAGE ANNUAL WAGES IN THE NATION, WISCONSIN, AND THE REGION: 1990, 2000, AND 2010

	1990	2000	2010	Percent Change	
				1990-2000	2000-2010
Nation					
Reported Dollars	23,605	35,331	46,751	49.7	32.3
Constant 2010 Dollars	39,213	43,932	46,751	12.0	6.4
Wisconsin					
Reported Dollars	21,111	30,687	39,985	45.4	30.3
Constant 2010 Dollars	35,070	38,158	39,985	8.8	4.8
Region					
Reported Dollars	23,001	33,956	44,037	47.6	29.7
Constant 2010 Dollars	38,210	42,223	44,037	10.5	4.3
Kenosha County					
Reported Dollars	21,161	31,362	36,414	48.2	16.1
Constant 2010 Dollars	35,153	38,997	36,414	10.9	-6.6
Milwaukee County					
Reported Dollars	23,482	34,743	46,240	48.0	33.1
Constant 2010 Dollars	39,009	43,201	46,240	10.7	7.0
Ozaukee County					
Reported Dollars	21,324	32,572	39,823	52.7	22.3
Constant 2010 Dollars	35,424	40,502	39,823	14.3	-1.7
Racine County					
Reported Dollars	22,849	32,537	41,547	42.4	27.7
Constant 2010 Dollars	37,957	40,458	41,547	6.6	2.7
Walworth County					
Reported Dollars	18,250	26,713	33,027	46.4	23.6
Constant 2010 Dollars	30,317	33,216	33,027	9.6	-0.6
Washington County					
Reported Dollars	19,843	28,922	37,758	45.8	30.6
Constant 2010 Dollars	32,964	35,963	37,758	9.1	5.0
Waukesha County					
Reported Dollars	23,845	35,777	46,000	50.0	28.6
Constant 2010 Dollars	39,612	44,487	46,000	12.3	3.4

Source: Wisconsin Department of Workforce Development in conjunction with U.S. Bureau of Labor Statistics (Quarterly Census of Employment and Wages); and SEWRPC.

Table V-11

**AVERAGE ANNUAL WAGES BY INDUSTRY
IN THE NATION, WISCONSIN, AND THE REGION: 2010**

Industry	Nation	Wisconsin	Region
Natural Resources & Mining	\$49,805	\$30,613	\$32,412
Construction.....	49,437	49,135	53,894
Manufacturing	57,183	50,183	57,575
Wholesale Trade.....	63,628	53,756	58,476
Retail Trade	26,656	22,883	23,183
Transportation.....	46,477	38,542	40,314
Utilities	78,842	82,829	94,708
Information.....	72,197	51,764	N/A
Financial Activities	73,803	53,332	61,144
Professional & Business Services	60,137	46,516	50,608
Education & Health Services.....	43,786	42,464	43,852
Leisure & Hospitality	19,729	14,597	16,480
Other Services	29,544	22,682	24,325
Public Administration	54,379	41,653	47,410
Total	\$46,751	\$39,985	\$44,037

N/A indicates data not available.

Source: Wisconsin Department of Workforce Development in conjunction with U.S. Bureau of Labor Statistics (Quarterly Census of Employment and Wages); and SEWRPC.

Table V-12

**INCOME LEVELS IN THE
UNITED STATES, WISCONSIN, AND THE REGION: 1999 AND 2010**

Geographic Area	1999	2010	Percent Change
United States			
Per Capita Income			
Reported Dollars.....	\$21,600	\$26,100	20.8
Constant 2010 Dollars	27,700	26,100	-5.8
Median Family Income			
Reported Dollars.....	50,000	60,600	21.2
Constant 2010 Dollars	64,100	60,600	-5.5
Wisconsin			
Per Capita Income			
Reported Dollars.....	\$21,300	\$25,500	19.7
Constant 2010 Dollars	27,300	25,500	-6.6
Median Family Income			
Reported Dollars.....	52,900	62,100	17.4
Constant 2010 Dollars	67,800	62,100	-8.4
Region			
Per Capita Income			
Reported Dollars.....	\$22,800	\$25,900	13.6
Constant 2010 Dollars	29,200	25,900	-11.3
Median Family Income			
Reported Dollars.....	57,400	65,400	13.9
Constant 2010 Dollars	73,500	65,400	-11.0

Source: U.S. Bureau of the Census and SEWRPC.

Table V-13

INCOME LEVELS IN THE REGION BY AREA: 1999 AND 2010

Geographic Area	Per Capita Income			Median Family Income		
	1999	2010	Percent Change	1999	2010	Percent Change
City of Kenosha						
Reported Dollars	\$19,600	\$21,900	11.7	\$51,000	\$56,300	10.4
Constant 2010 Dollars	25,100	21,900	-12.7	65,300	56,300	-13.8
Remainder of Kenosha County						
Reported Dollars	\$23,600	\$30,100	27.5	\$64,900	\$74,500	14.8
Constant 2010 Dollars	30,200	30,100	-0.3	83,100	74,500	-10.3
Kenosha County						
Reported Dollars	\$21,200	\$25,500	20.3	\$56,500	\$65,500	15.9
Constant 2010 Dollars	27,200	25,500	-6.3	72,400	65,500	-9.5
City of Milwaukee						
Reported Dollars	\$16,200	\$17,900	10.5	\$37,900	\$38,300	1.1
Constant 2010 Dollars	20,800	17,900	-13.9	48,600	38,300	-21.2
Remainder of Milwaukee County						
Reported Dollars	\$26,500	\$29,500	11.3	\$61,900	\$72,200	16.6
Constant 2010 Dollars	33,900	29,500	-13.0	79,300	72,200	-9.0
Milwaukee County						
Reported Dollars	\$19,900	\$22,400	12.6	\$47,200	\$50,700	7.4
Constant 2010 Dollars	25,500	22,400	-12.2	60,500	50,700	-16.2
Ozaukee County						
Reported Dollars	\$31,900	\$39,000	22.3	\$72,500	\$89,200	23.0
Constant 2010 Dollars	40,900	39,000	-4.6	92,900	89,200	-4.0
City of Racine						
Reported Dollars	\$17,700	\$18,200	2.8	\$45,200	\$39,100	-13.5
Constant 2010 Dollars	22,700	18,200	-19.8	57,900	39,100	-32.5
Remainder of Racine County						
Reported Dollars	\$24,900	\$29,500	18.5	\$65,000	\$77,100	18.6
Constant 2010 Dollars	31,900	29,500	-7.5	83,300	77,100	-7.4
Racine County						
Reported Dollars	\$21,800	\$25,600	17.4	\$56,300	\$62,200	10.5
Constant 2010 Dollars	27,900	25,600	-8.2	72,100	62,200	-13.7
Walworth County						
Reported Dollars	\$21,200	\$24,200	14.2	\$55,300	\$61,200	10.7
Constant 2010 Dollars	27,200	24,200	-11.0	70,800	61,200	-13.6
Washington County						
Reported Dollars	\$24,300	\$28,800	18.5	\$63,500	\$74,400	17.2
Constant 2010 Dollars	31,100	28,800	-7.4	81,300	74,400	-8.5
City of Waukesha						
Reported Dollars	\$23,200	\$26,500	14.2	\$60,800	\$69,200	13.8
Constant 2010 Dollars	29,700	26,500	-10.8	77,900	69,200	-11.2
Remainder of Waukesha County						
Reported Dollars	\$30,500	\$36,200	18.7	\$74,700	\$92,300	23.6
Constant 2010 Dollars	39,100	36,200	-7.4	95,700	92,300	-3.6
Waukesha County						
Reported Dollars	\$29,200	\$34,900	19.5	\$71,800	\$87,600	22.0
Constant 2010 Dollars	37,400	34,900	-6.7	92,000	87,600	-4.8

Source: U.S. Bureau of the Census and SEWRPC.

Table V-14**FAMILIES IN POVERTY IN THE REGION BY AREA: 2010**

Geographic Area	Total Families	Families in Poverty	Percent
City of Kenosha	23,306	4,216	18.1
Remainder of Kenosha County	18,023	546	3.0
Kenosha County	41,329	4,762	11.5
City of Milwaukee	125,710	31,721	25.2
Remainder of Milwaukee County	86,226	5,015	5.8
Milwaukee County	211,936	36,736	17.3
Ozaukee County	23,890	757	3.2
City of Racine	17,512	3,984	22.8
Remainder of Racine County	29,572	1,691	5.7
Racine County	47,084	5,675	12.1
Walworth County	27,957	2,704	9.7
Washington County	36,759	1,883	5.1
City of Waukesha	17,305	1,554	9.0
Remainder of Waukesha County	91,413	2,588	2.8
Waukesha County	108,718	4,142	3.8
Region	497,673	56,659	11.4

Source: U.S. Bureau of the Census and SEWRPC.

Table V-15
TOTAL POPULATION: 2013

MIDWEST METRO AREAS			OTHER METRO AREAS		
1	Chicago	9,537,289	1	Denver	2,697,476
2	Detroit	4,294,983	2	Charlotte	2,335,358
3	Minneapolis	3,459,146	3	Portland	2,314,554
4	St. Louis	2,801,056	4	San Antonio	2,277,550
5	Pittsburgh	2,360,867	5	Sacramento	2,215,770
6	Cincinnati	2,137,406	6	Providence	1,604,291
7	Cleveland	2,064,725	7	Milwaukee	1,569,659
8	Kansas City	2,054,473	8	Jacksonville	1,394,624
9	Columbus	1,967,066	9	Memphis	1,341,746
10	Indianapolis	1,953,961	10	Oklahoma City	1,319,677
11	Nashville	1,757,912	11	Richmond	1,245,764
12	Milwaukee	1,569,659	12	Raleigh	1,214,516
13	Louisville	1,262,261	13	Salt Lake City	1,140,483
14	Buffalo	1,134,115	14	Birmingham	1,140,300
Average		2,739,637	Average		1,700,841

Source: U.S. Bureau of the Census Annual Estimates of Population.

Table V-16
TOTAL EMPLOYMENT (JOBS): 2013

MIDWEST METRO AREAS			OTHER METRO AREAS		
1	Chicago	4,238,649	1	Denver	1,277,062
2	Detroit	1,781,295	2	Portland	1,029,419
3	Minneapolis	1,769,175	3	Charlotte	1,009,053
4	St. Louis	1,251,009	4	San Antonio	888,703
5	Pittsburgh	1,098,019	5	Sacramento	880,482
6	Cleveland	987,101	6	Milwaukee	795,555
7	Cincinnati	970,601	7	Providence	660,205
8	Kansas City	954,402	8	Salt Lake City	624,170
9	Columbus	937,791	9	Richmond	590,406
10	Indianapolis	923,952	10	Jacksonville	579,764
11	Nashville	817,814	11	Oklahoma City	578,555
12	Milwaukee	795,555	12	Memphis	578,430
13	Louisville	586,211	13	Raleigh	527,748
14	Buffalo	525,832	14	Birmingham	472,428
Average		1,259,815	Average		749,427

Source: U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages.

Table V-17
CHANGE IN TOTAL EMPLOYMENT (JOBS)
Percent Change: 2001-2013

MIDWEST METRO AREAS			OTHER METRO AREAS		
1	Nashville	13.5	1	Raleigh	22.2
2	Indianapolis	7.0	2	San Antonio	19.9
3	Columbus	4.0	3	Salt Lake City	15.1
4	Louisville	2.5	4	Charlotte	12.1
5	Minneapolis	2.4	5	Oklahoma City	9.0
6	Kansas City	0.5	6	Denver	8.1
7	Pittsburgh	-0.4	7	Jacksonville	7.9
8	Buffalo	-0.8	8	Portland	7.1
9	Cincinnati	-1.4	9	Sacramento	5.1
10	Chicago	-2.2	10	Richmond	4.4
11	St. Louis	-4.1	11	Birmingham	-1.5
12	Milwaukee	-4.6	12	Memphis	-2.4
13	Cleveland	-9.0	13	Providence	-2.6
14	Detroit	-13.1	14	Milwaukee	-4.6
Average		-0.4	Average		7.1

Source: U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages.

Table V-18
UNEMPLOYMENT RATE: 2013

MIDWEST METRO AREAS			OTHER METRO AREAS		
1	Detroit	9.4	1	Providence	9.7
2	Chicago	9.1	2	Memphis	9.3
3	Louisville	7.8	3	Sacramento	8.6
4	Buffalo	7.5	4	Charlotte	8.1
4	Cleveland	7.5	5	Portland	7.3
6	Milwaukee	7.3	5	Milwaukee	7.3
7	St. Louis	7.2	7	Jacksonville	6.9
8	Cincinnati	7.1	8	Denver	6.6
9	Indianapolis	6.9	9	Raleigh	6.4
10	Pittsburgh	6.8	10	San Antonio	6.0
11	Nashville	6.5	11	Richmond	5.9
12	Kansas City	6.4	12	Birmingham	5.7
13	Columbus	6.2	13	Oklahoma City	5.1
14	Minneapolis	4.8	14	Salt Lake City	4.2
Average		7.2	Average		6.9

Source: U.S. Bureau of Labor Statistics Local Area Unemployment Statistics.

Table V-19
PER CAPITA INCOME: 2013

MIDWEST METRO AREAS			OTHER METRO AREAS		
1	Minneapolis	\$34,029	1	Denver	\$33,636
2	Chicago	31,302	2	Raleigh	31,525
3	Pittsburgh	29,985	3	Portland	30,450
4	Kansas City	29,688	4	Providence	29,866
5	St. Louis	29,675	5	Richmond	29,527
6	Milwaukee	29,069	6	Milwaukee	29,069
7	Cincinnati	29,014	7	Sacramento	28,276
8	Cleveland	28,686	8	Charlotte	28,003
9	Columbus	28,601	9	Jacksonville	27,958
10	Detroit	28,080	10	Salt Lake City	26,819
11	Nashville	28,013	11	Birmingham	26,662
12	Louisville	27,739	12	Oklahoma City	26,191
13	Buffalo	27,715	13	Memphis	25,093
14	Indianapolis	27,657	14	San Antonio	24,597
Average		\$29,232	Average		\$28,405

Source: U.S. Bureau of the Census American Community Survey.

Table V-20
CHANGE IN GROSS DOMESTIC PRODUCT
Percent Change Adjusted for Inflation: 2001-2013

MIDWEST METRO AREAS			OTHER METRO AREAS		
1	Nashville	38.2	1	Portland	82.3
2	Indianapolis	21.9	2	Raleigh	42.9
3	Columbus	20.4	3	Charlotte	40.2
4	Minneapolis	19.3	4	Oklahoma City	39.4
5	Kansas City	16.3	5	Salt Lake City	39.2
6	Louisville	14.8	6	San Antonio	37.3
7	Cincinnati	13.9	7	Denver	25.1
8	Milwaukee	13.6	8	Sacramento	24.5
9	Buffalo	12.8	9	Jacksonville	16.4
10	Pittsburgh	12.1	10	Milwaukee	13.6
11	Chicago	8.3	11	Providence	13.3
12	St. Louis	8.1	12	Richmond	10.9
13	Cleveland	7.9	13	Birmingham	9.9
14	Detroit	-4.2	14	Memphis	4.4
Average		14.5	Average		28.5

NOTE: The metropolitan area gross domestic product is the market value of all final goods and services produced in the area in a year.

Source: U.S. Bureau of Economic Analysis.

Table V-21
GROSS DOMESTIC PRODUCT: 2013
(In millions of dollars)

MIDWEST METRO AREAS			OTHER METRO AREAS		
1	Chicago	590,248	1	Denver	178,860
2	Minneapolis	227,793	2	Portland	163,692
3	Detroit	224,726	3	Charlotte	139,022
4	St. Louis	145,958	4	Sacramento	108,165
5	Pittsburgh	131,265	5	San Antonio	96,030
6	Indianapolis	126,472	6	Milwaukee	94,374
7	Cleveland	122,878	7	Salt Lake City	76,185
8	Cincinnati	119,090	8	Providence	73,334
9	Kansas City	117,321	9	Oklahoma City	71,951
10	Columbus	114,253	10	Richmond	68,497
11	Nashville	100,841	11	Memphis	67,936
12	Milwaukee	94,374	12	Raleigh	66,878
13	Louisville	64,554	13	Jacksonville	62,104
14	Buffalo	51,630	14	Birmingham	59,722
Average		159,386	Average		94,768

NOTE: The metropolitan area gross domestic product is the market value of all final goods and services produced in the area in a year.

Source: U.S. Bureau of Economic Analysis.

Table V-22
GROSS DOMESTIC PRODUCT PER CAPITA: 2013

MIDWEST METRO AREAS			OTHER METRO AREAS		
1	Minneapolis	\$65,852	1	Portland	\$70,723
2	Indianapolis	64,726	2	Salt Lake City	66,801
3	Chicago	61,888	3	Denver	66,306
4	Milwaukee	60,124	4	Milwaukee	60,124
5	Cleveland	59,513	5	Charlotte	59,529
6	Columbus	58,083	6	Raleigh	55,066
7	Nashville	57,364	7	Richmond	54,984
8	Kansas City	57,105	8	Oklahoma City	54,522
9	Cincinnati	55,717	9	Birmingham	52,374
10	Pittsburgh	55,600	10	Memphis	50,633
11	Detroit	52,323	11	Sacramento	48,816
12	St. Louis	52,108	12	Providence	45,711
13	Louisville	51,142	13	Jacksonville	44,531
14	Buffalo	45,524	14	San Antonio	42,164
Average		\$56,934	Average		\$55,163

NOTE: The metropolitan area gross domestic product is the market value of all final goods and services produced in the area in a year.

Source: U.S. Bureau of Economic Analysis.

Table V-23
CHANGE IN MANUFACTURING SHARE OF TOTAL EMPLOYMENT
Percentage Point Change in Manufacturing Share of Total Employment: 2001-2013

MIDWEST METRO AREAS			OTHER METRO AREAS		
1	Kansas City	-1.5	1	Salt Lake City	-1.4
2	Minneapolis	-2.8	2	Memphis	-2.2
3	Pittsburgh	-3.1	3	San Antonio	-2.3
4	Milwaukee	-3.5	4	Sacramento	-2.4
5	Columbus	-3.5	5	Birmingham	-2.6
6	Chicago	-4.0	5	Raleigh	-2.6
7	Cleveland	-4.1	7	Oklahoma City	-2.9
8	Indianapolis	-4.2	8	Portland	-3.1
9	Nashville	-4.6	9	Milwaukee	-3.5
10	Detroit	-4.9	10	Richmond	-4.2
11	Buffalo	-5.1	11	Charlotte	-6.4
-	Cincinnati	N/A	-	Denver	N/A
-	Louisville	N/A	-	Jacksonville	N/A
-	St. Louis	N/A	-	Providence	N/A
Average		-3.8	Average		-3.1

Source: U.S Bureau of Labor Statistics Quarterly Census of Employment and Wages.

Table V-24
MANUFACTURING SHARE OF TOTAL EMPLOYMENT
Percent of Total Employment: 2013

MIDWEST METRO AREAS			OTHER METRO AREAS		
1	Milwaukee	15.0	1	Milwaukee	15.0
2	Detroit	12.7	2	Portland	11.2
3	Cleveland	12.5	3	Charlotte	9.8
4	Louisville	12.2	4	Salt Lake City	8.6
5	Cincinnati	10.9	5	Birmingham	8.0
6	Minneapolis	10.5	6	Memphis	7.7
7	Buffalo	9.7	7	Oklahoma City	6.3
8	Chicago	9.6	8	Raleigh	5.9
9	Indianapolis	9.5	9	Richmond	5.2
10	Nashville	9.2	10	San Antonio	5.1
11	St. Louis	8.8	11	Denver	5.0
12	Pittsburgh	8.1	12	Jacksonville	4.8
13	Kansas City	7.5	13	Sacramento	3.8
14	Columbus	7.4	-	Providence	N/A
Average		10.3	Average		7.4

Source: U.S Bureau of Labor Statistics Quarterly Census of Employment and Wages.

Table V-25
 MANUFACTURING SHARE OF GROSS DOMESTIC PRODUCT
 Percent of GDP Related to Manufacturing: 2013

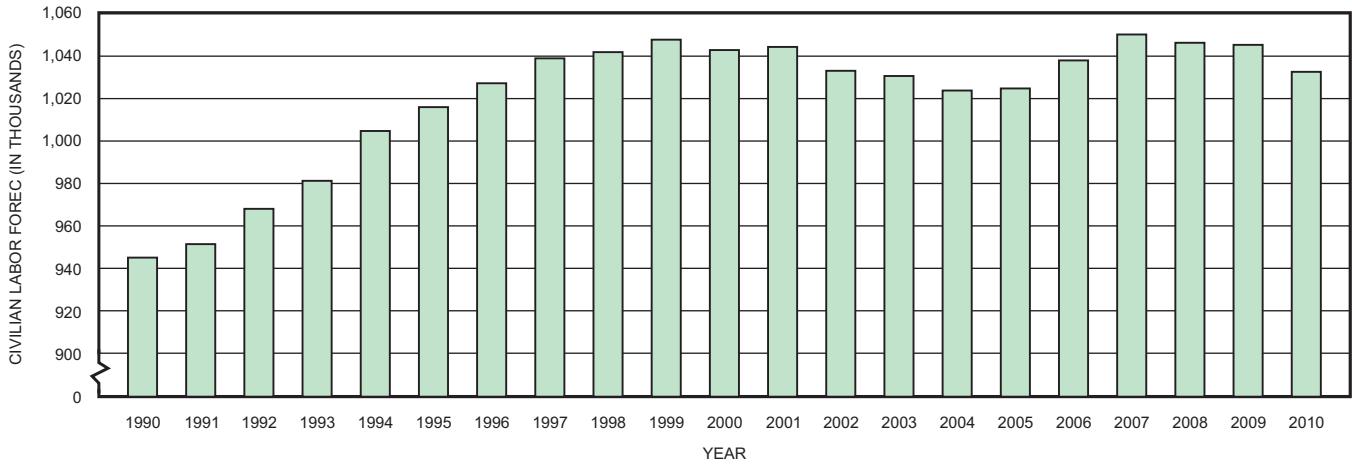
MIDWEST METRO AREAS			OTHER METRO AREAS		
1	Indianapolis	24.1	1	Portland	34.6
2	Detroit	17.7	2	Milwaukee	16.5
3	Louisville	17.0	3	Charlotte	14.4
4	Milwaukee	16.5	4	Raleigh	14.1
5	Cincinnati	16.4	5	Salt Lake City	13.4
6	Cleveland	15.9	6	Memphis	12.8
7	Buffalo	14.8	7	Richmond	12.2
8	St. Louis	13.6	8	Birmingham	10.8
9	Chicago	13.2	9	San Antonio	7.7
9	Minneapolis	13.2	10	Oklahoma City	7.2
11	Kansas City	10.6	11	Denver	6.2
11	Nashville	10.6	11	Jacksonville	6.2
13	Pittsburgh	9.8	13	Sacramento	5.1
14	Columbus	9.3	-	Providence	NA
Average		14.5	Average		12.4

Source: U.S. Bureau of Economic Analysis.

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Figure V-1

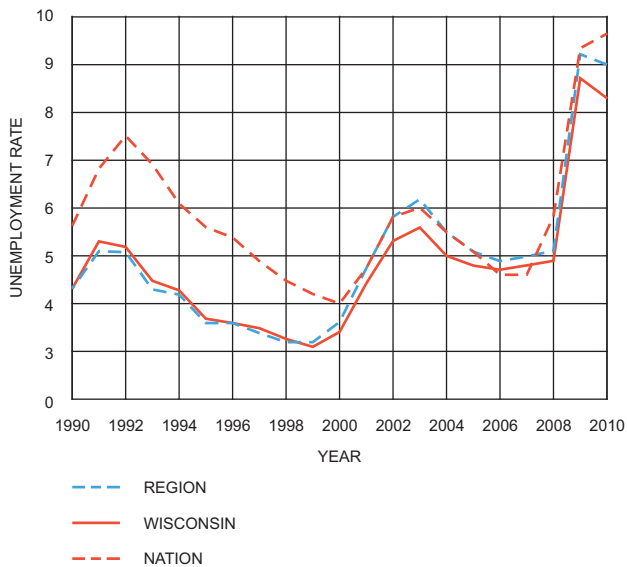
CIVILIAN LABOR FORCE IN THE SOUTHEASTERN WISCONSIN REGION: 1990-2010



Source: Wisconsin Department of Workforce Development in conjunction with the U.S. Bureau of Labor Statistics (Local Area Unemployment Statistics) and SEWRPC.

Figure V-2

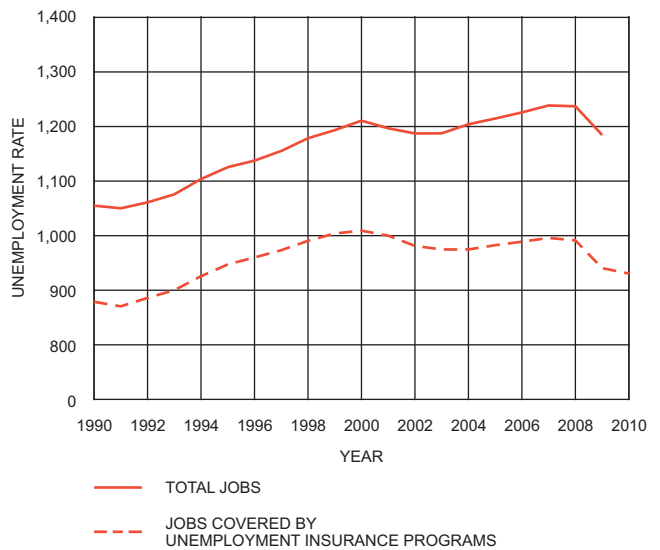
UNEMPLOYMENT RATES IN THE NATION, WISCONSIN, AND THE REGION: 1990-2010



Source: Wisconsin Department of Workforce Development in conjunction with the U.S. Bureau of Labor Statistics (Local Area Unemployment Statistics) and SEWRPC.

Figure V-3

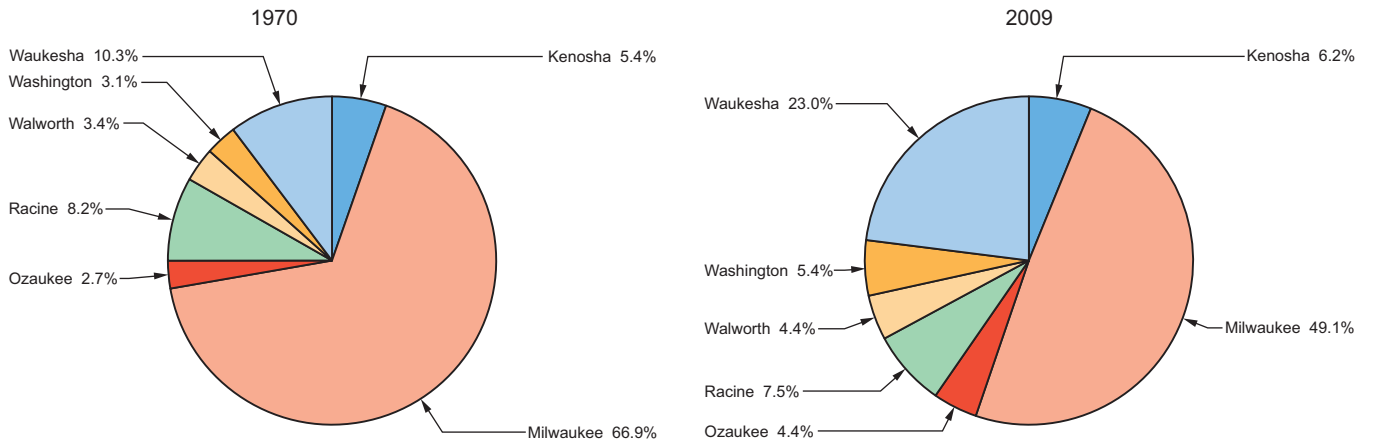
EMPLOYMENT (JOBS) IN THE REGION: 1990-2009/2010



Source: Total Jobs--U.S. Bureau of Economic Analysis (Regional Economic Accounts). Jobs Covered by Unemployment Insurance--Wisconsin Department of Workforce Development in conjunction with U.S. Bureau of Labor Statistics (Quarterly Census of Employment and Wages).

Figure V-4

SHARE OF REGIONAL EMPLOYMENT BY COUNTY: 1970 AND 2009

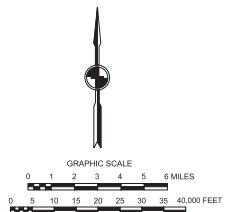
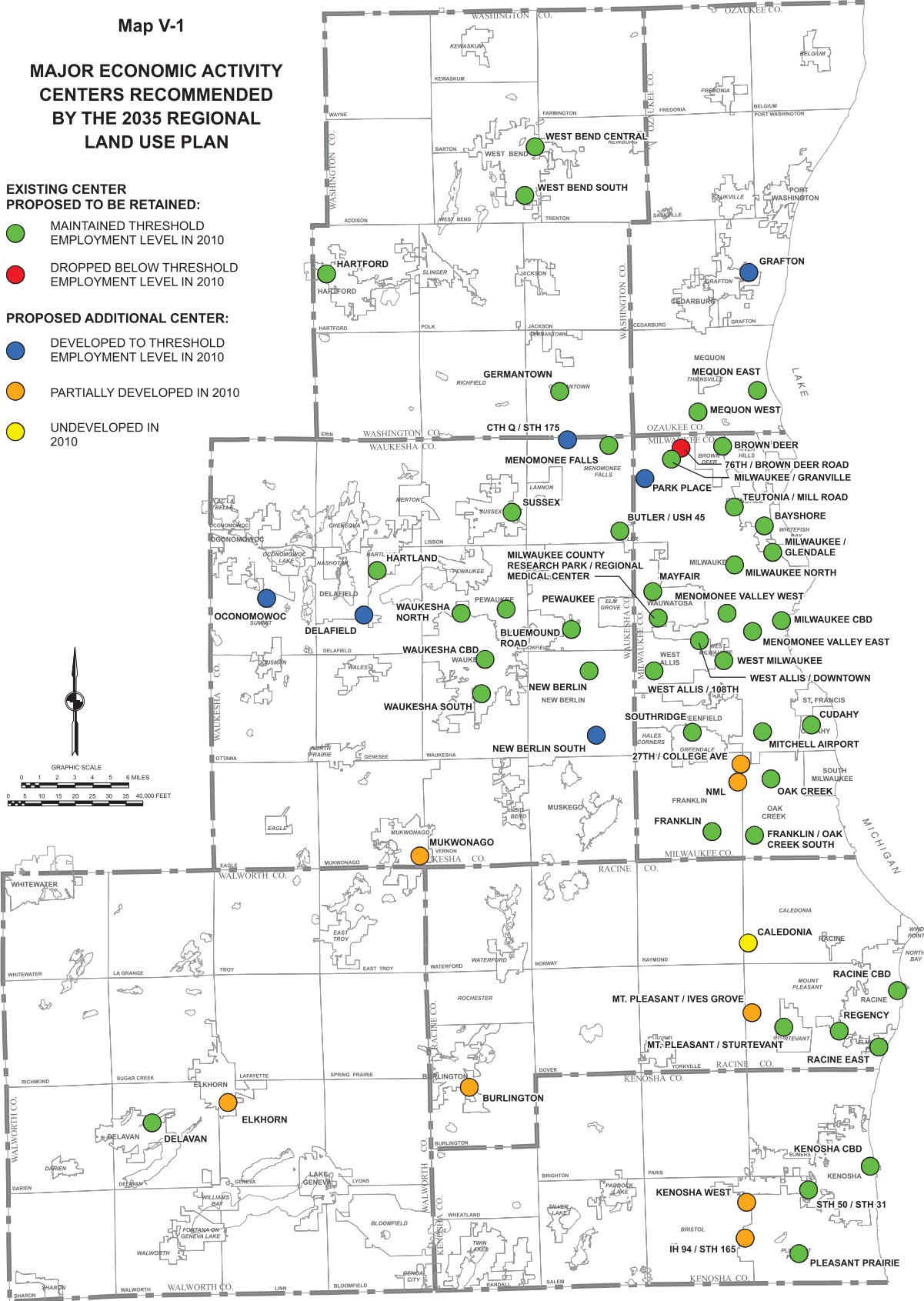


Source: U.S. Bureau of Economic Analysis and SEWRPC.

Map V-1

MAJOR ECONOMIC ACTIVITY CENTERS RECOMMENDED BY THE 2035 REGIONAL LAND USE PLAN

- EXISTING CENTER PROPOSED TO BE RETAINED:**
- MAINTAINED THRESHOLD EMPLOYMENT LEVEL IN 2010
 - DROPPED BELOW THRESHOLD EMPLOYMENT LEVEL IN 2010
- PROPOSED ADDITIONAL CENTER:**
- DEVELOPED TO THRESHOLD EMPLOYMENT LEVEL IN 2010
 - PARTIALLY DEVELOPED IN 2010
 - UNDEVELOPED IN 2010



Source: SEWRPC

**COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY
FOR SOUTHEASTERN WISCONSIN: 2015 - 2020**

Chapter VI

FRAMEWORK FOR ECONOMIC GROWTH

INTRODUCTION AND BACKGROUND

The Southeastern Wisconsin Region boasts a rich and dynamic economic legacy. Milwaukee's economic foundation was built on heavy industry. The city grew as a major port, a manufacturing leader, and a beer production capital. Today, the region is a vibrant center for commerce with a unified commitment to economic growth.

In the past few decades, as the global economy has experienced – and continues to undergo – a fundamental shift toward more knowledge-intensive products, services, and processes, the region has experienced significant challenges, including low growth rates, long-term job losses, and rising poverty.

Business models, supply chains, and connections among firms and institutions are also shifting dramatically, causing firms and entire industries to reexamine their strategic positioning and seek out new markets, partners, and ways of doing business to be competitive in the next economy. New centers of gravity are beginning to form, but emerging opportunities are still being defined, and the constellation of stakeholders and resources necessary to realize them is not yet fully aligned.

The Southeastern Wisconsin region is at an economic crossroads. Its performance has lagged the nation and other metropolitan areas on many measures, and intra-regional competition has hampered the region's ability to undertake collaborative efforts to catalyze growth. At this critical juncture, the region needs a deliberate, strategic set of activities and enterprises that will contribute to the achievement of a prosperous and inclusive next-economy future.

Confronting this economic transformation, the region has begun to forge this new path in accordance with the drivers and dynamics of the new economy:

- Firms are investing in new markets, products, supply chains, and collaborative partnerships to enable them to innovate and compete on a global scale. Mature firms and industries are striving to find ways to retain or regain their competitive edge in an era in which continuous innovation and smaller, more nimble, and more highly networked firms are increasingly the norm.
- The labor market is seeking a new equilibrium, as employers restructure and seek new skills and working relationships; workers across the economy struggle to update their qualifications to keep pace with the changing demand for higher-order and more occupation-specific skills across all industries; and providers strive to become more connected and responsive to the rapidly changing market. New, high-growth

occupations provide plentiful opportunities for productive up-skilling and redeployment of the region's human capital.

- Workers have begun to seek out denser, mixed-use, walkable communities in which to live, and some firms are starting to recognize the benefits of co-locating in mixed-use environments that reduce the costs of interaction; catalyze cross-fertilization; and facilitate the innovative activities crucial for new-economy success.
- Previously tenuous connections within the innovation and entrepreneurship ecosystem are both broadening and deepening to facilitate identification and growth of next-economy opportunities that build on the region's industrial and institutional assets – particularly in water, food, energy, advanced business services, and sophisticated machinery.
- Public, private, and civic stakeholders are creating new partnerships – connecting the “old guard” and emerging leadership – and collaborating in industry groups, entrepreneurship projects, redevelopment of key land assets and much more, including in this comprehensive economic growth planning effort. They are creating the institutional capacity to act in more deliberate and strategic ways to meet the challenges and seize the opportunities offered by the new economy.

To identify its place on the path to transformation and articulate this set of integrated growth strategies tailored to its assets and challenges in light of the changing global economic environment, M7 engaged a broad array of regional stakeholders in the process of Metropolitan Business Planning (MBP); a proactive, fact-based, action-oriented approach to targeting, aligning, and leveraging regional assets for inclusive growth in the next economy. Strengths, Weaknesses, Opportunities, and Threats (SWOT) identified as part of the framework planning process are set forth in Figure VI-1.

Metropolitan Business Planning establishes a new approach to regional economic development, geared toward redeploying and aligning assets to establish a region's most competitive position in the new economy. *The M7 Framework for Economic Growth* is a metropolitan business plan for the Southeastern Wisconsin region that features a detailed analysis of the levers that drive the region's growth and an integrated set of strategies tailored to the region's unique assets and opportunities.

A pdf of the Executive Summary can be viewed at

http://mke7.com/~media/Documents/MKE7FrameworkforEconGrowthExecSummary04_14.ashx

A pdf of the full plan document can be viewed at

http://mke7.com/~media/Documents/MKE7FrameworkforEconGrowth04_14.ashx

The region has begun to make this transition toward a vibrant, new-economy environment – including establishment of multiple active cluster organizations, palpable energy in the innovation ecosystem, revitalization of the Menomonee Valley and Fifth Ward, the Machinery Row/RootWorks integrated development along the river in downtown Racine, as well as other revitalization in the core cities. Now is the time to leverage existing activities and energy and align the region's efforts through a comprehensive, mutually reinforcing set of strategies and implementing enterprises. Coordinated execution of a set of nine cross-cutting strategies will achieve synergies and magnify growth across all parts of the region's economy:

- **Energy, power, and controls**, focusing on products and services related to electrical power distribution and industrial and building automation and controls.
- **Water technologies**, involving water quality and quantity, wastewater treatment, environmental engineering, and the manufacturing and distribution of pumps, valves, and other water related equipment.
- **Food and beverage production and manufacturing**, involving ingredients, processing, and food production.
- **Finance and insurance services**, focusing on insurance and money management.

- **Headquarters and business services**, particularly relating to information technology; data processing systems and services; distribution and supply chain systems; and medical information.
- **Medical technology, bioscience, and health services**, focusing on diagnostic equipment and botanical and pharmaceutical research, product development, and manufacturing.

AREAS OF ECONOMIC DISTRESS

For purposes of its grant programs, the U.S. Economic Development Administration (EDA) identifies counties and census tracts in economic distress, based on unemployment rate and per capita income. Counties or census tracts with an average 24-month unemployment rate above the U.S. average by one percentage point or more, and/or with an average annual per capita income level 80 percent or less than the U.S. average are considered economically distressed.

Map VI-1 shows census tracts in the Region that met EDA criteria for economic distress as of May 2015, based on five-year American Community Survey data from 2009-2013. A total of 223 census tracts, or 42 percent of census tracts in the Region met the economic distress criteria; including 58 percent of census tracts (173 of 296) in Milwaukee County, 49 percent (17 of 35) in Kenosha County, 48 percent (21 of 44) in Racine County, and 36 percent (eight of 22) in Walworth County. One census tract in Washington County and three census tracts in Waukesha County, or about 4 percent of census tracts in each county, met the EDA economic distress criteria, and none of the census tracts in Ozaukee County met the criteria.

Many census tracts that meet EDA criteria for economic distress also have higher than average concentrations of minority residents. Map VI-2 shows census tracts in the Region where the percentage of minority residents exceeds the regional average of 29.2 percent. Minority residents include African American, American Indian/Alaska Native, Asian and Pacific Islander, and Hispanic persons.

Map VI-3 compares census tracts with an above average concentration of minority residents to census tracts that meet EDA economic distress criteria. Of the 223 census tracts that meet economic distress criteria, 171, or 77 percent, have a minority population higher than the regional average. In Milwaukee County, 85 percent of economically distressed census tracts also had higher than average minority populations. Over half of the census tracts meeting economically distressed criteria in Kenosha and Racine Counties also had higher than average minority populations. Walworth and Waukesha Counties each had one census tract that met economic distress criteria and had a minority population higher than the regional average.

The national unemployment rate during the period 2009-2013 was 9.7 percent. The unemployment rate was more than double the national rate in 72 census tracts in the Region (see Map VI-4). There were 62, or 21 percent of all census tracts in Milwaukee County, with an unemployment rate of 20 percent or more, including eight with an unemployment rate between 30 and 40 percent and five with an unemployment rate above 40 percent. Four census tracts in Kenosha County and six in Racine County also had unemployment rates between 20 and 30 percent. All of the census tracts with an unemployment rate over 20 percent were also tracts with a higher than average percentage of minority population. With the exception of one tract that includes areas in both the City of Kenosha and Town of Somers and one tract located in western Racine County (Southern Wisconsin Center), all of the census tracts with an unemployment rate over 20 percent were located in the Cities of Kenosha, Milwaukee, or Racine.

Information from the U.S. Census Bureau and the Bureau of Labor Statistics indicates the unemployment rate varies by race and ethnicity. In the City of Milwaukee, the Bureau of Labor Statistics reported an overall unemployment rate in 2013 of 12.2 percent. The unemployment rate for White workers that live in the City was 8.7 percent compared to 16.3 percent for Black/African Americans and 19.8 percent for Hispanic resident

workers. As shown in Figure V-2 in Chapter V, unemployment rates are higher for minority workers throughout Wisconsin and the United States.

The City of Milwaukee *Growing Prosperity*¹ plan describes several issues related to high unemployment and low incomes in some City neighborhoods. These issues include low achievement in elementary and secondary school; low levels of post-high school education; lack of transportation to jobs and job training, and high incarceration rates among African American males. The Growing Prosperity plan, which draws from a report prepared by the Employment and Training Institute at UWM,² states:

“Incarceration rates among African American males remain a major impediment to employment: of the approximately 57,000 African American male residents in Milwaukee, more than 23,000 are in prison or have an incarceration record. Upon release from prison, men who have been incarcerated face poor odds for meaningful employment. Nationally, less than half secure a job upon their return to the community. In fact, ex-offenders are the least likely to find successful employment due to their records, time out of the labor force, persistent legal problems, low education attainment levels, restrictions on access to student loans, limited government supports for education and vocational training, high recidivism rates, and driver’s license suspensions and revocations.”

The UWM report includes six recommendations. Recommendations 3, 4, and 5, which relate to workforce development, are included in the “Principles and Action Plan” section in Chapter VII. Recommendations from the City of Milwaukee *Growing Prosperity* report that rely on the M7 or Milwaukee Area Workforce Investment Board for implementation are also included in the Action Plan in Chapter VII of this report.

Looking toward the future, the region’s economy is at a critical inflection point. Its performance is uneven as firms, workers, and a range of public and private institutions are working to adapt to the new-economy environment. Deliberate, collaborative action to leverage strategic assets and address key challenges is needed to put the region on a path to inclusive new-economy prosperity. Proposed actions are presented in Chapter VII.

NINE STRATEGIES FOR REGIONAL PROSPERITY

Reflecting the assets, challenges, and opportunities revealed in the market analysis and SWOT, a set of nine mutually reinforcing strategies are proposed for moving the Southeastern Wisconsin region forward on the path to new-economy growth. Each strategy is designed to increase the productivity of local firms by leveraging the region’s unique strengths, taking advantage of its emerging opportunities and addressing its most critical challenges.

These nine strategies are deliberately crafted to cut across market levers and be mutually reinforcing; through coordinated implementation, their impact will be enhanced. Together they build upon current assets and momentum to enable the region to realize its potential to become a leading place to do business in the next

¹ *Growing Prosperity: An Action Agenda for Economic Development in the City of Milwaukee, prepared by the City of Milwaukee, September 2014. The City’s plan complements the M7 Framework for Economic Growth plan and identifies actions to capitalize on the regional strategies presented in the M7 plan. The City plan is available at:*

<http://city.milwaukee.gov/ImageLibrary/Groups/cityDCD/planning/plans/Economic-Growth-Plan/GrowingProsperityFullReport.pdf>

² *Pawasarat, John and Lois M. Quinn, Wisconsin’s Mass Incarceration of African American Males: Workforce Challenges for 2013, Employment and Training Institute, University of Wisconsin- Milwaukee, 2013; available at: <https://www4.uwm.edu/eti/2013/BlackImprisonment.pdf>.*

economy, and a thriving, prosperous and dynamic region. These strategies provide a framework that encompasses, contextualizes, and aligns existing efforts, and offers guidance for identifying, developing, and prioritizing future economic growth initiatives.

1. Become a leading innovator, producer, and exporter of products and services related to **energy, power, and controls**.

Three trends are anticipated to create future growth opportunities in the energy, power, and controls cluster:

- The resurgence in U.S. manufacturing will likely lead to greater demand for industrial automation and controls equipment and systems in domestic facilities.
- Expanding investments in electrical power infrastructure averaged \$63.9 billion per year between 2001 and 2010.
- The building energy efficiency industry is projected to grow more than 50 percent over the 2011 to 2017 period, increasing expenditures to nearly \$104 billion annually worldwide.

The region's energy, power, and controls cluster is large, highly concentrated, and export-intensive. It is comprised of three industry segments: electrical equipment; instruments and controls; and other electrical equipment. The regional cluster includes more than 200 establishments and nearly 19,000 employees.

The region is well positioned to grow its energy, power, and controls cluster given its array of global leaders in critical segments of the cluster, including Rockwell Automation (industrial and automation controls); SPX Transformer Solutions (formerly Waukesha Electric) and Eaton (formerly Cooper Power) (power infrastructure); and Johnson Controls (energy storage, building energy efficiency).

A collaborative network of companies and academic institutions has formed the Mid-West Energy Research Consortium (M-WERC, a recent expansion of the Wisconsin Energy Research Consortium), and one-on-one university-industry partnerships such as the University of Wisconsin-Milwaukee/Johnson Controls Partnership in Energy Research are similarly creating more capacity and innovation in the cluster.

2. Become a global hub for innovation and start-up activity in **water technology**.

The water technology industry is a large and growing market, both domestically and internationally. The U.S. market for water and wastewater services and products is estimated at \$139 billion in 2012, up 3.8 percent from the prior year, while the global market is nearly \$500 billion.

The region's access to the Great Lakes – 21 percent of the world's surface fresh water – provides several economic advantages. The region has a competitive edge in attracting and growing water-related industries, which benefit from close proximity to this plentiful resource. Between 130 and 150 water-related companies are located in the region, including five of the 11 largest water firms in the world. Similar to other industries in the "green" space, the water technology industry includes a broad spectrum of products and services, with industry strengths in pumps, meters, boilers and valves, which in aggregate employ 3,600 workers.

The region is also home to world-class research institutions, making it a world hub of water technology, research, and policy. The University of Wisconsin-Milwaukee (UWM) School of Freshwater Sciences is the only graduate school in the nation dedicated solely to the study of freshwater. UWM's Great Lakes WATER Institute is the largest academic freshwater research facility on the Great Lakes.

The 100-plus corporate members of The Water Council continue to build on these competitive advantages to establish the region as a global hub for water-related research and development, company formation, and human capital development. The Council has several initiatives underway, including the Global Water Center,

focused on water research and business acceleration; the Global Freshwater Seed Accelerator; the Industry/University Cooperative Research Center, which brings together two universities in partnership with six regional firms; and creation of a water-relevant curriculum for five campuses in the University of Wisconsin system.

3. Leverage the region's geographic, supply chain and human capital advantages to grow the **food and beverage** cluster.

The region's food and beverage cluster is large, concentrated, and growing in export activity. The core of the cluster – food manufacturers, processors, and artisans – is comprised of more than 300 firms and employs approximately 14,000 people, creating one of the strongest concentrations among major U.S. markets. The region is also home to nearly 6,800 workers in industry segments that support the core, including food products machinery manufacturing and food and beverage distribution.

Nationally, food and beverage manufacturing growth is projected to be strong over the 2010 to 2020 period in both employment and output, based on demand for functional, organic, and locally grown foods. The region's food and beverage manufacturing assets align well with expanding domestic and international markets.

The region exhibits supply-chain advantages in growing a competitive food and beverage cluster, given its proximity to the vast quantities of crop-based, dairy, and animal products generated throughout Wisconsin. These agricultural outputs continue to drive a regional strength in ingredient manufacturing, ranging from seasonings to enzymes. The state of Wisconsin's food manufacturers exported \$1.7 billion in 2012, an increase of 156 percent since 2005.

This cluster also has the advantage of a formal cluster organization, the Food and Beverage Wisconsin (FaB) network, composed of more than 50 firms working together to enhance cluster growth by focusing on the areas of talent, innovation, and business development. Initiatives underway or being planned by FaB include a pilot career awareness program at a public high school, tailored technical college curricula, a career resource center, industry directory, and a small business accelerator program.

4. Enhance the **export capacity and capability** of the region's firms, focusing on small- and medium-sized enterprises. Given that the majority of the world's purchasing power is outside the U.S., and a disproportionate share of global economic growth over the next decade will occur beyond U.S. borders, increasing export activity is imperative to the economic future of the region.

The opportunity to engage more of the region's companies in the international marketplace is significant – the region does not export at a level commensurate with the size of its manufacturing economy, and the bulk of export activity is occurring within a very small number of large firms. The region has all of the necessary components already in place to support the development of a broader export base, and sizable opportunities exist to expand and strengthen exporting by the region's manufacturers and service providers, especially small- and mid-sized firms that are either new to exporting or lack the capacity to expand their current export programs.

In late 2013, the region was one of eight U.S. metro areas selected for the Global Cities Initiative, a high-profile program established by the Brookings Institution and JPMorgan Chase to expand global trade and exporting. One of the first steps for the region will be to design and implement a regional export strategy and action plan in 2014. Components of this strategy include:

- Improving alignment of regional resources around exporting.
- Supporting small- and mid-sized firms in developing export strategies and plans.
- Leveraging large firms as catalysts to mentor smaller companies in exporting.

- Exploring opportunities for expanding service exports – establish a baseline model.
- Advocating for export policy as a critical success factor in regional development.

5. Align **workforce development** with growth opportunities in targeted, high-potential industry clusters.

Perhaps the most critical factor for increasing the productivity, and therefore overall growth prospects, of the region’s clusters is to upgrade and better align the skills of the workforce with the occupations that are and will be demanded by employers. Increasing the number and type of “on-ramps” to labor force participation and articulating paths to upward mobility, particularly for the region’s central city and minority populations, will also enhance economic growth by more effectively deploying the region’s full spectrum of human capital assets.

Key elements of this strategy include:

- Augment the quantity and quality of information, including real-time data, available to the education and training system to improve regional intelligence regarding the demand for and supply of particular skill sets across the spectrum of low-, middle-, and high-skilled occupations in the region’s priority clusters.
- Strengthen the feedback loop between employers and workforce development providers to enable better alignment of training curricula with workplace needs, building, for example, off efforts such as FaB’s employer engagement and curriculum development.
- Articulate cluster-specific career pathways and create certification and credentialing programs to enable more robust firm-worker matching and upward career mobility for low- and middle-skill workers.
- Identify the need for and develop rapid up-skilling programs to assist workers in upgrading and redeploying their skills into emerging occupational opportunities, building, for example, off the technical colleges’ sector-specific “boot camp” programs.
- Leverage limited state and federal resources by promoting coordinated application for and use of available funding by system providers.

6. Foster a dynamic, richly networked **innovation and entrepreneurship ecosystem**, building on existing nascent, but fragmented activities. The region has gained impressive momentum in creating an innovation and entrepreneurship ecosystem. There is significant activity among private, public, and institutional actors that must be deliberately leveraged to boost rates of new firm creation and build the competitive advantage of existing firms.

The region’s high-priority clusters present ample opportunities for innovation and entrepreneurship, including new processes and products to further accelerate already-strong clusters’ growth trajectories, opportunities for legacy clusters to redeploy their resources into new products and markets, and creation of entirely new products and services in emerging clusters.

Key elements of this strategy – all of which are mutually reinforcing – include:

- Strengthen industry-academic partnerships to better align institutional R&D agendas with industry needs.
- Stimulate university technology transfer to bring more institutional R&D to market through commercialization in existing firms and spin-off of new companies.
- Enrich the array of technical support, funding, and other resources (e.g., incubation facilities) available to emerging innovators and entrepreneurs in the region’s high-potential clusters.
- Increase sharply the capital resources available to regional entrepreneurs, focusing on early-stage ventures as well as those in the fast-growth, scale-up stage of development.
- Accelerate adoption of new technologies in more mature industries, facilitating their transition toward the next economy.

- Promote creation of dense, mixed-use, well-connected districts, centered around particular technologies, innovation- and entrepreneurship-enabling facilities, and/or high-potential clusters.
 - Enhance the visibility of entrepreneurial activity, encourage creative problem-solving and elevate risk-taking as a cultural norm through competitions, hack-a-thons and other contests.
 - Cultivate a densely networked, integrated and dynamic ecosystem of regional actors driving innovation and entrepreneurship.
7. Catalyze “**economic place-making**” in the region’s core cities and strategic locations throughout the region. The physical development pattern in the region reflects its old-economy history and needs to be reshaped to align with the drivers of growth in the more dynamic, knowledge-intensive next economy. The region must streamline the movement of goods, people, and ideas throughout the region; reconnect its underutilized human capital assets to economic opportunities; and better leverage its strategically located land assets to foster growth in the new economic environment.

The shift in regional development and redevelopment patterns has begun to take place through, for example, the 30th Street Corridor, Menomonee Valley, Pleasant Prairie, Pabst Farms, and the UW-Milwaukee Innovation Park. Catalyzing additional development that follows the next-economy principles of density, mixed uses, and strong physical and virtual connections between residential and commercial activity will further accelerate the region’s growth.

Key elements of this strategy include:

- Enhance physical (e.g., transit) and virtual (e.g., broadband) connections between nodes of economic activity throughout the region, including between workers and firms and across supply chains, and particularly focused on currently under-served geographies in the region’s core cities and outlying counties.
 - Create policies, programs, and incentives that promote evolution of the region’s built environment toward a constellation of well-connected, dense, mixed-use communities, e.g., foster infill development, walkability, transit access, etc.
 - Promote strengthening and creation of dense, mixed-use, well-connected districts, focused around particular technologies, innovation-, and entrepreneurship-enabling facilities (e.g., incubators, co-working spaces, etc.), and/or high-potential clusters.
8. Modernize **regional infrastructure** to enhance efficiency, cost-effectiveness, and connectivity. High-quality infrastructure, including a mix of transportation, broadband, and reliable energy, contributes to the region’s economic growth by enabling enhanced productivity of private-sector firms. The role of transportation infrastructure – facilitating the efficient movement of people and goods into, out of, and within the region – is particularly critical. Strategic investments to improve the existing transportation network will better connect workers to employers, suppliers to customers, and headquarters to their facilities in other regions and nations.

By lowering firms’ costs of doing business and enhancing the ability of workers to access well-matched jobs, the region will become a more competitive location for doing business. While transportation infrastructure is the current emphasis of this strategy, other types of strategic infrastructure investments (e.g., broadband upgrades, green infrastructure, etc.) should be pursued as needs arise.

The primary elements of this strategy are:

- Upgrade and strategically expand public transit to provide more direct and timely access between residential and job centers. Preserve, improve, and strategically expand service based on current and projected growth patterns for both housing and employment and evaluation of which locations could most benefit from service improvements.

- Rebuild the aging freeway system to reduce congestion, improve safety, and address design deficiencies.
- Maintain and improve commercial air service at General Mitchell International Airport (GMIA) to serve the needs of regional businesses, including particularly the headquarters and business services cluster, which tends to be among the most travel-intensive. Expand and upgrade airport facilities as needed to address the changing demands of airlines and passengers.
- Enhance the cost-efficient movement of freight by improving water travel through the Port of Milwaukee as well as freight rail travel through projects such as the Muskego Yard bypass or a regional intermodal facility.
- Enhance the connection of the Southeastern Wisconsin region to Northeastern Illinois

9. Enhance **inter-jurisdictional cooperation and collaboration** for economic growth.

Government fragmentation and disjointed approaches to economic development activities hamper growth potential in the region. These conditions create a complicated and costly environment in which to do business, and foster intra-regional competition that results in sub-optimal outcomes for the region.

To reduce these institutional barriers to economic growth, this strategy includes three primary components:

- Eliminate duplication and achieve more cost-effective, efficient, and streamlined provision of government services. Government efficiency fosters economic growth by improving the tax-value proposition for firms (i.e., they reap more value for their tax dollars). The Intergovernmental Cooperation Council of Milwaukee County, the Kenosha County Council of Governments, the Walworth County Intergovernmental Cooperation Council, the Waukesha County Cooperation Council, and similar organizations have identified and begun to execute shared services initiatives across the region. Efforts across county lines have also been made, including a recent joint recycling project between the City of Milwaukee and Waukesha County, joint fuel purchases by the City of Milwaukee, Milwaukee County, and Waukesha County, and HAZMAT services provided by the City of Milwaukee for the four-county MSA and by the City of Racine for Racine, Kenosha, and Walworth Counties. These efforts should be bolstered to identify further opportunities to better coordinate public services and align policies in ways that reduce costs. Joint discussions and efforts among all municipalities in each county and between county and local governments across county lines should also be pursued on a regular basis.
- Identify and leverage economic growth opportunities and connections across jurisdictions. Regional leadership should proactively seek out opportunities to work with county economic development organizations and others to pursue collaborative economic growth projects that cross jurisdictional boundaries and benefit the broader seven-county region.
- Create cross-sector institutional infrastructure to manage the regional economy. The next-economy environment requires collaboration among actors from across the public, private, and civic sectors – often with one of the latter two in the lead – to develop strategies and initiatives, manage implementation, and monitor performance of the regional economy. Continued emphasis should be placed on strengthening civic engagement and creating the extensive, nimble networks that can adapt as necessary to address economic challenges and capture opportunities.

PUBLIC-PRIVATE RELATIONSHIPS

Relationships Between the Business Community and Government Agencies

In the increasingly dynamic economy, regions that enable the ready entry of new people and firms and the fluid development of relationships, deals, and activities that drive economic progress are the ones that will succeed. Facilitating this type of environment requires a new form of governance – a constellation of public, private, and civic institutions – that fosters open, adaptive, and flexible cross-sector networks.

Government needs to enable economic activity through value-added public goods; efficient and streamlined processes; transparency and information sharing; and broad-based stakeholder engagement. In addition, public-, private- and civic-sector actors alike need to heighten their capacity to deliberately and proactively engage in collaborative, cross-sector efforts; develop locally tailored economic growth strategies; and engage leaders and stakeholders across all sectors to own and execute them.

The increasingly global and dynamic economic environment places a premium on rich formal and informal networks that enable exchange of ideas and facilitate relationships, transactions, and coordination across the public, private and civic sectors. In the region, cross-sector stakeholders tend to be engaged in limited networks that hamper their ability to effectively coordinate and collaborate to shape the economic environment. Within the economic development sphere in particular, organizations tend to be unaware of each other's work and either do not have the capacity or interest to collaborate. They often operate in distinct silos, either geographically or by focus area – e.g., workforce development, entrepreneurship, cluster-focused efforts, etc. – and therefore fail to realize the synergies that would be possible if their efforts were more closely coordinated. Since its creation in 2005, M7 has made meaningful strides in bringing economic development stakeholders from across the region to a common table. Creating and engaging in ongoing implementation of this economic development strategy will provide a valuable vehicle for continued, deeper collaboration among cross-sector stakeholders.

Assessment

The institutional environment and business culture in the Southeastern Wisconsin region reflect its industrial past and the challenge that local governments, businesses, and other institutions face in making the transition to the new economic environment.

Fragmentation in the public sector can create arbitrary jurisdictional boundaries that impose unnecessary costs on businesses that must navigate a maze of disparate and potentially contradictory policies, regulations, and taxes. Historical conflicts between the City of Milwaukee and its suburbs, in particular, sometimes foster competition rather than collaboration among the region's counties and municipalities. Enhanced coordination and collaboration among the region's numerous government bodies could serve to reduce duplication, achieve efficiencies of scale, and streamline the delivery of public goods and services, ranging from transportation to workforce development to public safety to administrative functions.

The region's tax structure – particularly its property taxes – places an additional cost burden on both businesses and residents. At the same time, local governments must contend with a state-level tax structure that gives them virtually no ability to generate local revenue streams to pay for investments in new or upgraded public goods and services. Further, what revenues are available are not yet being invested in ways that align with the priorities of the region's new-economy firms. In the industrial economy, the region was considered a good place to do business (e.g., quality infrastructure, education, and other public goods). However, in the context of the new economy, the region's governments have not yet identified the right balance between managing the region's costs of doing business and making new investments in the value-added goods and services that will be most effective at supporting and growing its emerging mix of industries. Absent a significant change in the state tax structure – acknowledged as an extremely challenging policy to pursue – local governments need to undertake concerted efforts to reduce their costs of doing business, through reduced fragmentation and additional inter-jurisdictional collaboration.

The business culture and institutional networks in the region are in transition, evolving from a top-down traditional structure that served it well during the industrial era to one that is more open, flexible, and able to meet the needs of the more fluid and dynamic economy that is emerging. Public, private, and civic stakeholders are beginning to interact in more coordinated ways and engage in cross-sector networks that create a more vibrant business environment for the region.

Examples of Business-Government Collaboration

M7 Regional Economic Development Partnership

The M7 Regional Economic Development Partnership was formed in 2005 to take a regional approach to the growth, expansion, and attraction of businesses in the region. It has been successful in engaging economic development entities, government agencies, and the business community in sharing regional data and working more cooperatively on economic development programs and expansion and attraction leads. Development of the M7's *Regional Framework for Economic Growth* in 2013 has successfully engaged a broad array of public, private, and civic stakeholders from across the region to develop a set of strategies to drive economic growth in the region. Institutionalizing the regional planning process for economic development as an ongoing way of collaboratively managing the regional economy will further enhance institutional capacity and impact going forward.

County Economic Development Organizations

All seven counties in the Region have established a county economic development organization (EDO).³ The Milwaukee County EDO is an agency of County government governed by a standing committee of the County Board. The remaining six counties have formed non-profit corporations to foster economic development in the county. Each is governed by a public-private board composed of business leaders, elected officials and county and local government administrators, and representatives from area utility companies, workforce development boards, universities and technical colleges, and local school districts. Each EDO provides a number of services and programs, including business funding through revolving loan funds, accelerator and seed programs, business retention and site selection services, and implementation of Main Street and other local programs. All seven County EDOs are members of the Southeast Wisconsin Regional Economic Partnership (REP) and work with M7 to develop and implement economic development programs in the Region.

The County EDOs are:

- Kenosha Area Business Alliance (KABA)
- Milwaukee County Economic Development
- Ozaukee Economic Development (OED)
- Racine County Economic Development Corporation (RCEDC)
- Walworth County Economic Development Alliance (WCEDA)
- Economic Development Washington County (EDWC)
- Waukesha County Economic Development

Next Generation Manufacturing Council

The Next Generation Manufacturing (NGM) Council focuses on the manufacturing sectors of the regional economy. The NGM Council is advisory to the M7 Council, and is composed of business leaders, local officials, and government agency staff, including the heads of the three manufacturing clusters (M-WERC, The Water Council, and FaB Wisconsin), the REP, the Regional Workforce Alliance, the Wisconsin Economic Development Corporation, and the Wisconsin Manufacturing Extension Partnership. The NGM Council is also responsible for ensuring that grant applications related to the recent EDA designation of the Region as an Investing in Manufacturing Communities Partnership (IMCP) program participant are consistent with NGM priorities.

Investing in Manufacturing Communities Partnership

The Investing in Manufacturing Communities Partnership (IMCP) is an Economic Development Administration program designed to accelerate the resurgence of manufacturing in communities nationwide by helping communities and regions attract and expand private investment in the manufacturing sector and increase

³ *The Waukesha County EDC was dissolved in Fall 2014. The County is exploring options for future economic development planning. In the interim, the County Land Use and Parks Department is overseeing economic development activities for the County.*

international trade and exports. The M7 Region was designated a Manufacturing Community in 2014, based on an application submitted by the M7 in cooperation with the Redevelopment Authority of the City of Milwaukee.

Enhancing the Region's manufacturing base is the focus of the IMCP program, with an emphasis on the energy, power, and controls; water technology; and food and beverage clusters. Workforce development, supply chains, and increasing the Region's exports are components in addition to developing and commercializing new products. Seven catalytic projects were identified as part of the IMCP program:

- The M-WERC Energy Innovation Center
- The Water Council BREW Accelerator
- Development of a Food and Beverage Accelerator (FaBcelerator)
- Century City Advanced Manufacturing Training Center
- Century City/30th Street Corridor Infrastructure Development
- Racine's Machinery Row
- M7 Regional Export Initiative.

Transform Milwaukee

Transform Milwaukee is a public-private partnership focused on restoring economic prosperity to the industrial, residential, and transportation areas in the City of Milwaukee connecting the 30th Street Industrial Corridor (including the Century City redevelopment project), Menomonee Valley, Port of Milwaukee, and the Milwaukee Aerotropolis (the area surrounding General Mitchell International Airport, which also includes portions of the Cities of Cudahy, Oak Creek, Saint Francis, and South Milwaukee). The Wisconsin Housing and Economic Development Authority (WHEDA) is leading the Transform Milwaukee initiative, which includes a number of state, federal, and regional agencies; the City of Milwaukee; and private foundations and nonprofit groups. Transform Milwaukee is a multi-faceted program that seeks to address the redevelopment of abandoned industrial sites and residential properties, create new businesses and jobs, provide educational and job training opportunities, install bioswales and other stormwater management facilities to address flooding problems, and improve transportation facilities.

Efforts to redevelop the 30th Street Industrial Corridor, Port of Milwaukee, and the Aerotropolis area are fairly recent. Redevelopment of the Menomonee Valley has been underway since 1998, when the City of Milwaukee, the Menomonee Valley Business Association, and the Milwaukee Metropolitan Sewerage District prepared a land use plan to guide redevelopment of the Valley. At the time, the State of Wisconsin was laying the groundwork for the Hank Aaron State Trail. As a result of these planning efforts, Menomonee Valley Partners was formed as a nonprofit organization, a public-private partnership to facilitate business, neighborhood, and public partners in efforts to revitalize the Valley.

In the past 10 years, 39 companies have moved to or expanded in the Valley, 5,200 jobs have been created, 45 acres of native plants, seven miles of trails, and a nationally recognized shared stormwater treatment system have been established. More than 250 organizations and 450 individuals have given pro bono time by serving on boards, committees, and working teams, while thousands of individuals have volunteered at Valley events. Today, the Valley is a national model of economic and environmental sustainability. Recognized by the Sierra Club as "One of the 10 Best Developments in the Nation," the Menomonee Valley continues to receive local and national recognition.

Machinery Row

The catalyst for RootWorks, an integrated development of public/private sector projects in downtown Racine on the Root River, Machinery Row is expected to be a bustling, eclectic live-work center. The project includes the redevelopment of historic warehouses and industrial buildings lining Water Street, which will be adaptively reused as urban lofts, live-work units, and creative spaces for growing new businesses. Machinery Row is also

adjacent to the River Loop, which provides 1.75 miles of scenery, bike paths, walkways, river access, parkways, and access to the City's Transit Center.

Regional Transit Initiative

This diverse group of public- and private-sector leaders has come together with the goal of developing and implementing a collaborative regional transit leadership agenda that will improve transportation and the dynamics for job access, workforce development, and the economy of Southeastern Wisconsin. The Initiative's vision is for a comprehensive, integrated, multi-modal transit network in Southeastern Wisconsin that will:

- Facilitate Southeastern Wisconsin economic and workforce growth, and connections to Chicago area economic opportunities.
- Increase cross-jurisdictional regional connectivity, effectively linking people to jobs, education, healthcare, and other destinations in the region.
- Act as a magnet for talent and young people, and be easily affordable to people across all income levels, fostering inclusion and broad-based economic opportunity.
- Provide collaboration and coordination across the region with buses as the foundation, and increase connections to all forms of transportation.
- Use a credible visioning process to build a shared vision and an informed public. Engage business, civic, and elected leaders; young professionals; and diverse communities in the process.
- Be sustainably funded.

Business Incubators and Accelerators

Business incubators and accelerators have been or are in the process of being established in the Region through public-private partnerships. The Global Water Center, Energy Innovation Center, and UWM Innovation Accelerator have been established to assist businesses related to the key clusters of water technology; energy, power, and controls; and bioscience and medical devices, respectively. The Technology Innovation Center was established to assist businesses in the information technology and biosciences industries, and the Whitewater University Innovation Center was established to support business start-ups by University faculty and students. Efforts are also underway to secure funding to develop a Food and Beverage accelerator facility (FaBcelerator).

- ***Global Water Center and Reed Street Yards***

The Global Water Center is a water research and business accelerator center in the City of Milwaukee's Walker's Point neighborhood that opened in 2013. The center houses water-related laboratory and other research facilities for universities, existing water-related companies, and accelerator space for emerging water-related companies. It is a venue for attracting and creating new businesses in the water industry, and aims to address key local and global water-quality technology and policy issues. The building's redevelopment also serves as a catalyst for the development of the adjacent Reed Street Yards, which has been designated by the City of Milwaukee as an 18-acre water technology research park and will serve as a global showcase for water management.

The Global Water Center includes the BREW (Business, Research, Entrepreneurship in Wisconsin) water technology accelerator program, which focuses on entrepreneurs that address global freshwater challenges. Working with the Wisconsin Economic Development Corporation (WEDC) and in partnership with the University of Wisconsin-Whitewater's College of Business and Economics, the six-month program provides \$50,000 grants, low-cost leases, a mentor network, investor contacts, and a training program to help water technology entrepreneurs get their products and services to market. The first class of four entrepreneurs began the program in September 2013. Six companies were selected to participate in the class that began in September 2014. A third class will begin in September 2015.

- ***Milwaukee County Research Park, Regional Medical Center, and Technology Innovation Center***

Created by Milwaukee County to nurture technology-based companies, this 175-acre development center at the Milwaukee County Grounds in Wauwatosa includes more than 70 high-tech firms employing 4,800

people. Major tenants include GE Healthcare’s clinical systems and corporate IT facility and United Health Care’s headquarters. A business incubator, the Technology Innovation Center, is home to 44 technology-based businesses. The park is governed by a nonprofit corporation created by Milwaukee County. The research park is adjacent to the Milwaukee Regional Medical Center (home to Froedtert Hospital, Children’s Hospital, the Medical College of Wisconsin, and the BloodCenter of Wisconsin) and the new UWM Innovation campus.

The Technology Innovation Center (TIC) is a business incubator for high-tech firms with a focus on information technology and software; biotechnology and medical devices; and industrial applications and manufacturing. The TIC is intended to provide facilities for companies that have a business plan in place and are in the process of “scaling up” their business, rather than start-up companies. Facilities and services provided include access to high-bandwidth internet and “wet” lab space, in addition to shared conference rooms and equipment.

The Milwaukee Regional Medical Center and Milwaukee County Research Park form a Life Science Campus that has developed into a driving force in Milwaukee County’s economy. The Regional Medical Center is the core of medical research and development and education in the Milwaukee metropolitan area; and draws patients from throughout the Region, State of Wisconsin, and northern Illinois. Hospitals employ almost 5 percent of Milwaukee County workers, with another 5 percent of workers employed at doctors’ offices and clinics. The Milwaukee County Research Park is home to some of the Region’s most innovative companies, from the international GE Healthcare to entrepreneurial startups in biomedical, software, and related industries. These assets led the University of Wisconsin-Milwaukee Real Estate Foundation to develop Innovation Campus adjacent to the Milwaukee County Research Park and Regional Medical Center.

- *University of Wisconsin-Milwaukee (UWM) Innovation Campus and Innovation Accelerator*
The UWM Innovation Campus is an 89-acre mixed-use development on the Milwaukee County Grounds, and includes a new UWM research center (Innovation Accelerator) and existing and planned corporate research facilities. The campus is adjacent to the Milwaukee County Research Park and the Regional Medical Center. The Innovation Accelerator, which opened in early 2014, includes state-of-the-art laboratory facilities for use by academic and industry researchers, with a focus on bioscience and medical devices.
- *Energy Innovation Center and Century City Business Park*
The Midwest Energy Research Consortium (M-WERC), in cooperation with the City of Milwaukee, M7, WEDC, and other partners, is developing an Energy Innovation Center (EIC) at Century City Tower in the City of Milwaukee’s 30th Street Corridor. The EIC will bring together industry and academic scientists and engineers and business leaders to conduct joint research, develop innovative technologies, transition prototype products to the commercial stage, and nurture startup companies. The EIC, as the physical facility for M-WERC, will play a critical role in furthering the development of the Midwest region as a global hub for the energy, power, and control industry by establishing a facility that provides collaborative workspace and ongoing programs and activities.
- *Whitewater University Innovation Center and Technology Park*
The Whitewater University Innovation Center opened in 2011 and is home to 15 companies. The facility is operating at full capacity. Development of the Center was a joint effort by the University of Wisconsin-Whitewater (UWW), the City of Whitewater, and the City of Whitewater Community Development Authority. WEDC provided partial funding for the Center. The Innovation Center was designed to offer collaborative space, equipment, resources, and services to business start-ups generated by university professors and students, including shared conference rooms and equipment and “wet” laboratories. Support to growing companies is available from UWW, the Walworth County Economic Development Alliance and City of Whitewater, and programs run by the Small Business Development Center located on the Whitewater campus. Businesses located at the center range from those developing education and software programs to

technology to improve manufacturing processes. The Center is located in a 130-acre business park, which could provide development sites for businesses “graduating” from the Center.

Wisconsin Center for Commercialization Resources (WCCR)

Institutions of higher education have extensive resources, including specialized research, outreach, technology transfer, and commercialization capabilities, as well as recognized faculty expertise and sophisticated laboratories. The EDA-supported University Center (UC) program is specifically designed to make the resources located within colleges and universities available to support regional economic development strategies in regions of chronic and acute economic distress. The Wisconsin Center for Commercialization Resources (WCCR) is the UC program in the Southeastern Wisconsin Region.

WCCR was established in 2012 to help first-time entrepreneurs, university faculty members, and businesses turn ideas into commercially viable ventures. The WCCR is a five-university consortium. Partners include UW-Milwaukee (UWM), UW-Parkside, UW-Whitewater (UWW), the Milwaukee School of Engineering (MSOE), and Marquette University. Key assets of the partner schools include the Applied Technology Center at MSOE, the LaunchPad Program at UWW, the Kohler Center for Entrepreneurship at Marquette University and intellectual property assistance for the Marquette Law School, the UWM Innovation Accelerator, and the UW-Parkside Small Business Development Center.

Clinical and Translational Science Institute of Southeast Wisconsin

The Clinical and Translational Science Institute of Southeast Wisconsin is a consortium of eight Milwaukee institutions dedicated to transforming the biomedical research enterprise in the Region to advance patient care and education. The eight member organizations are the Medical College, Marquette University, MSOE, UWM, the BloodCenter of Wisconsin, Children’s Hospital and Health System, Froedtert Hospital, and the Clement J. Zablocki VA Medical Center. Consortium members share each other’s research resources, technology, knowledge, and expertise to work toward common goals in health care.

Figure VI-1

REGIONAL STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

Representative Strengths

- Leading manufacturing region in the U.S., robust university research and engineering programs, and high concentration of manufacturing employees across various skill levels
- Strong clusters in advanced manufacturing and power, energy, and controls, food and beverage, water technology, financial services, information technology and medical technology
- Availability of utilities at moderate cost (electricity, natural gas, and water)
- Good regional and international airport access within 2 hour radius of region
- Strong university and technical college systems
- Highly rated quality of life, especially in Waukesha and Ozaukee counties
- Lower-cost industrial real estate than many other U.S. regions
- Numerous major corporate headquarters across several industries

Representative Challenges

- Higher taxes, and limited economic incentives, compared with many U.S. regions
- Ability to exploit operating cost advantages compared to other U.S. regions
- Limited availability of large, shovel-ready industrial sites
- Educational attainment, while relatively high overall, remains highly variable throughout the region
- The region performs near or below average on many indicators of innovation and entrepreneurship

Representative Opportunities


- Recruiting Northern Illinois companies based on the region's competitive value proposition and Illinois' recent corporate and personal tax rate increases
- Foreign direct investment in Europe, building on four Spanish companies that have recently established operations in the region
- Continued cluster development in the water technology; food and beverage manufacturing; power, energy and controls; advanced manufacturing; and medical technology sectors
- Potential clusters in financial services, and smaller sub-clusters in industrial/manufacturing design
- Expansion of Foreign Trade Zone (FTZ) and EB-5 Foreign Investment Zone programs
- Growth of Venture Debt Program for revenue generating early-stage companies
- Collaboration with inter-regional, regional, and state economic development organizations to more effectively promote the region and align resources
- Improvement in entrepreneurial climate through the continued growth of BizStarts Milwaukee

Representative Threats

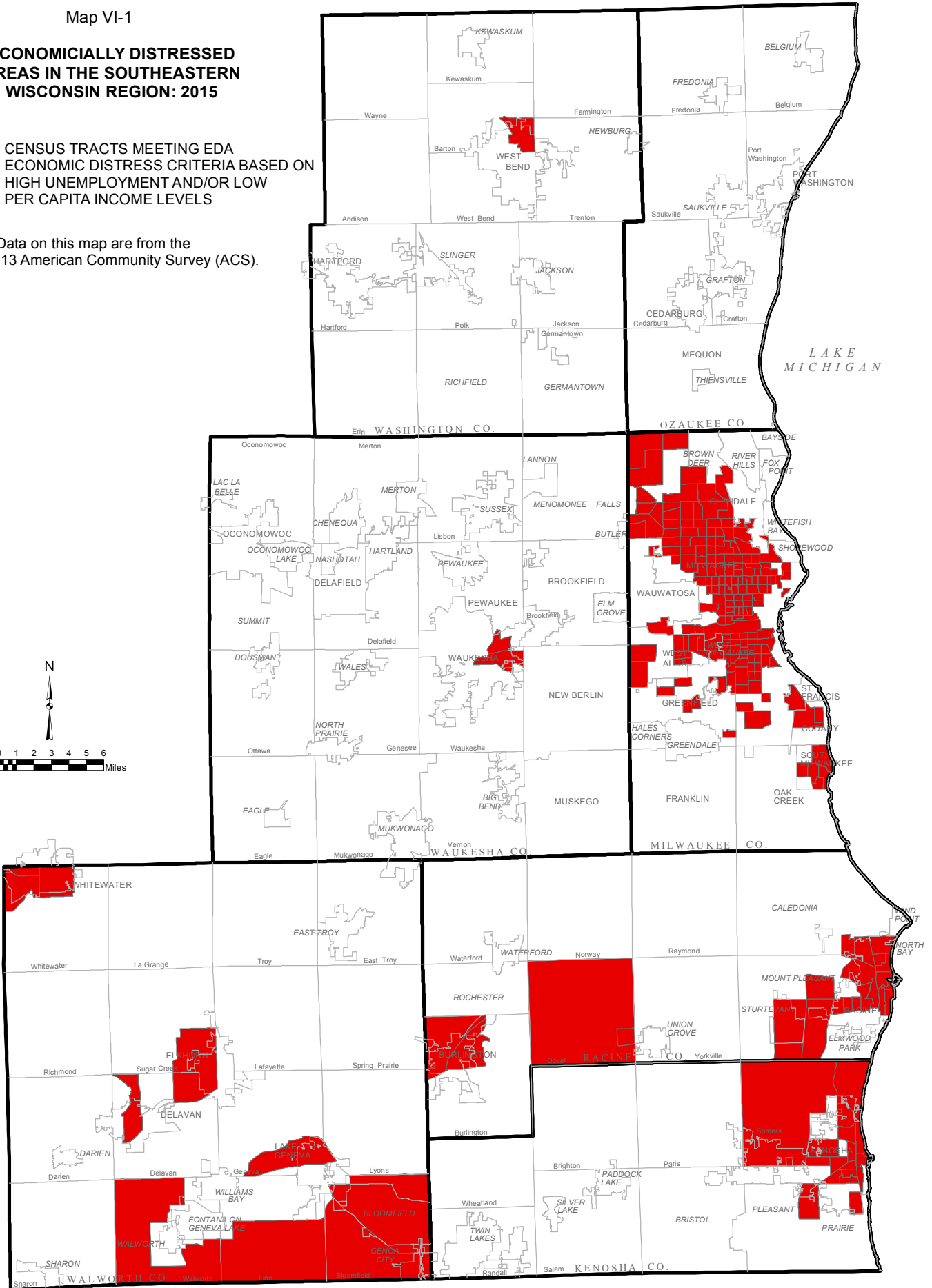
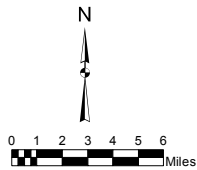
- Talent shortage and misaligned workforce without the skills to meet the needs of employers, especially in the manufacturing sector
- Aging population and workforce
- Brain drain of local college graduates
- Manufacturing dependence
- Other states and regions with stronger economic incentives and lower taxes

Map VI-1

ECONOMICALLY DISTRESSED AREAS IN THE SOUTHEASTERN WISCONSIN REGION: 2015

 CENSUS TRACTS MEETING EDA ECONOMIC DISTRESS CRITERIA BASED ON HIGH UNEMPLOYMENT AND/OR LOW PER CAPITA INCOME LEVELS

NOTE: Data on this map are from the 2009-2013 American Community Survey (ACS).



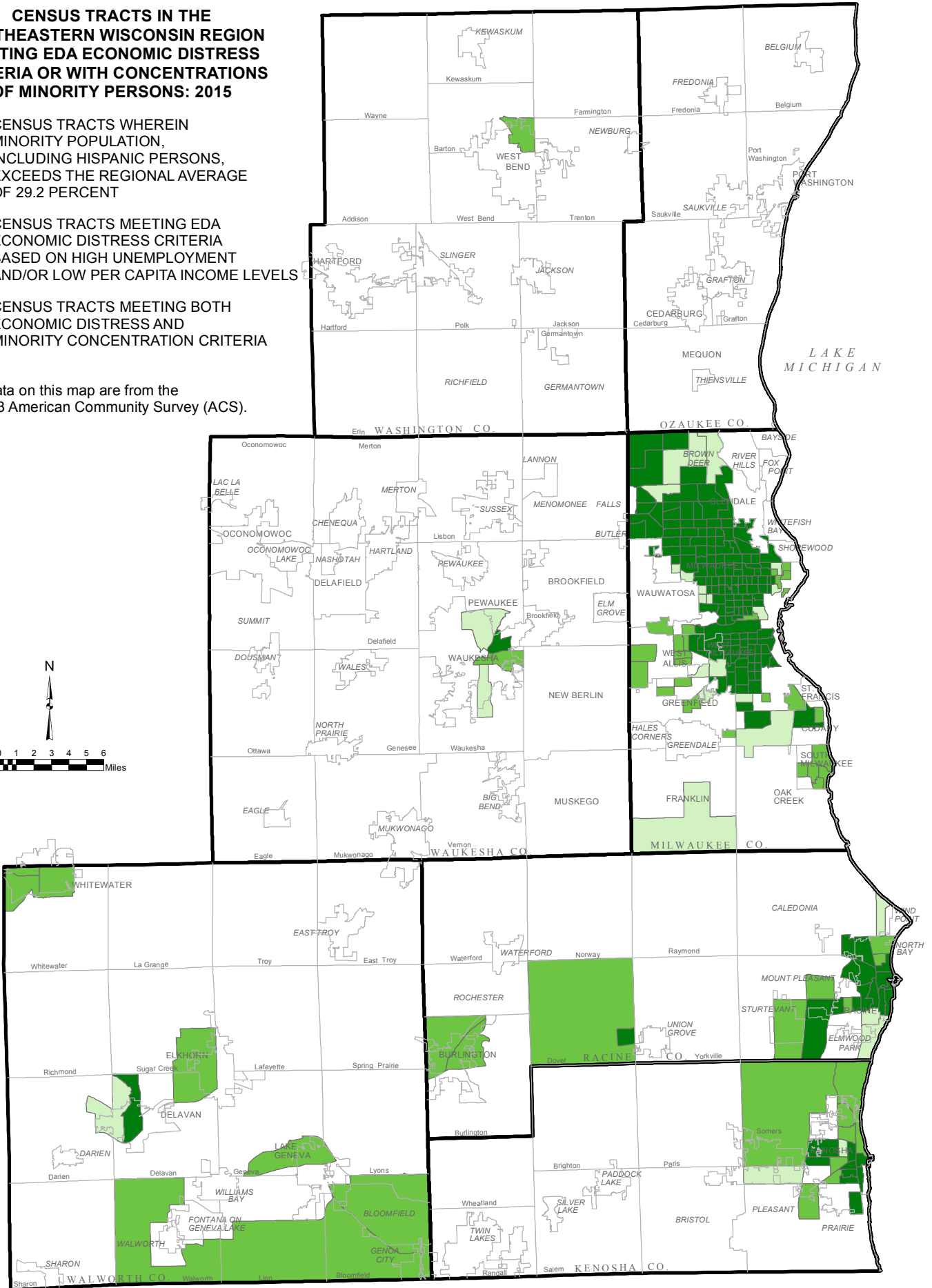
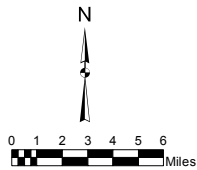
Source: StatsAmerica and SEWRPC.

Map VI-3

**CENSUS TRACTS IN THE
SOUTHEASTERN WISCONSIN REGION
MEETING EDA ECONOMIC DISTRESS
CRITERIA OR WITH CONCENTRATIONS
OF MINORITY PERSONS: 2015**

- CENSUS TRACTS WHEREIN
MINORITY POPULATION,
INCLUDING HISPANIC PERSONS,
EXCEEDS THE REGIONAL AVERAGE
OF 29.2 PERCENT
- CENSUS TRACTS MEETING EDA
ECONOMIC DISTRESS CRITERIA
BASED ON HIGH UNEMPLOYMENT
AND/OR LOW PER CAPITA INCOME LEVELS
- CENSUS TRACTS MEETING BOTH
ECONOMIC DISTRESS AND
MINORITY CONCENTRATION CRITERIA

NOTE: Data on this map are from the
2009-2013 American Community Survey (ACS).

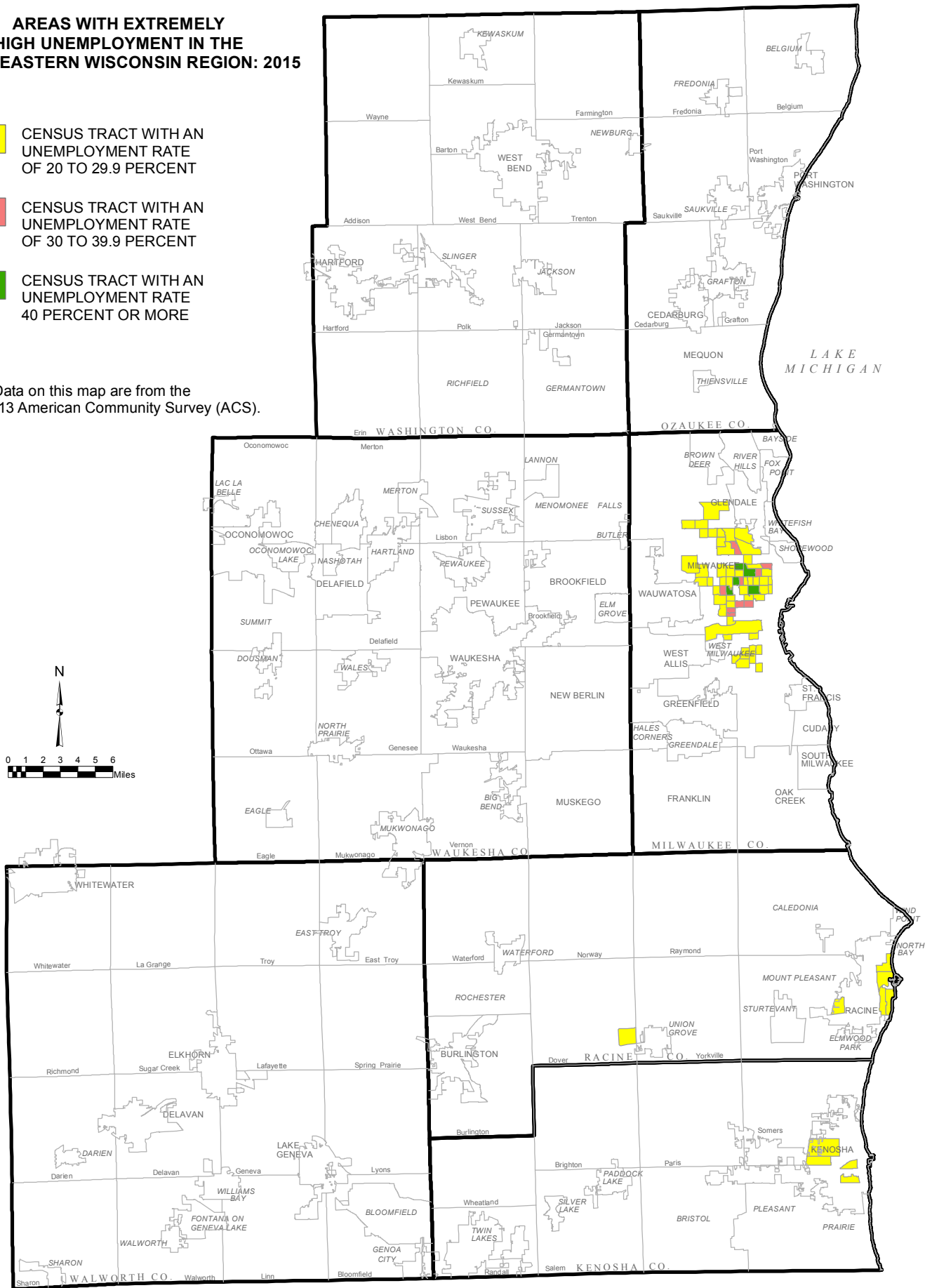


Source: U.S. Bureau of the Census, StatsAmerica, and SEWRPC.

AREAS WITH EXTREMELY HIGH UNEMPLOYMENT IN THE SOUTHEASTERN WISCONSIN REGION: 2015

- CENSUS TRACT WITH AN UNEMPLOYMENT RATE OF 20 TO 29.9 PERCENT
- CENSUS TRACT WITH AN UNEMPLOYMENT RATE OF 30 TO 39.9 PERCENT
- CENSUS TRACT WITH AN UNEMPLOYMENT RATE 40 PERCENT OR MORE

NOTE: Data on this map are from the 2009-2013 American Community Survey (ACS).



COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY FOR SOUTHEASTERN WISCONSIN: 2015 - 2020

Chapter VII

A PLAN FOR ACTION

INTRODUCTION

The M7 organization has developed a focused long-term strategy aimed at making the Southeastern Wisconsin Region globally competitive in an innovation economy. The strategic planning process began by identifying the region's distinctive assets – a combination of people and place-based advantages that make up the region's value proposition.

An assessment was then done to identify the region's export driver industries, i.e. the industries that export their goods and services beyond our regional borders, thereby bringing new income back into the region and having a positive ripple effect throughout the regional economy. For every job in the "Export Driver" category, at least one additional job is created to supply and support those industries.

Opportunities for the region's long-term prosperity were then assessed by aligning the region's identified assets with the top export driver industries. These theories were tested at feedback sessions with regional business leaders and community and county representatives. From there, outside research was gathered and analyzed to identify operations types that align with the region's strengths. Utilizing national and international best practices, nearly 300 industry groups were studied and 47 location factors evaluated.

Through the strategic planning process, research, and competitive analysis, a business plan was built around six target sectors that offer the best potential for growth, expansion and attraction. These sectors are: Energy, Power, and Controls; Food and Beverage Manufacturing; Water Technologies, Finance and Insurance; Headquarters and Business Services; and Medical Technology and Biotech.

This plan continues to be refined based on changing economic conditions, new information and results. In 2013, the M7 updated its strategic framework with *The Milwaukee Region Framework for Economic Growth*, a metropolitan business plan that features a detailed analysis of the levers that drive the region's growth and an integrated set of strategies tailored to the region's unique assets and opportunities. Further information on the framework is detailed in Chapter VI.

ECONOMIC DEVELOPMENT VISION

The mission of the Milwaukee 7 is to unite the seven counties of southeastern Wisconsin around a regional agenda to grow, expand, and attract world-class businesses and talent.

The economic development vision for the region is to be globally competitive in an innovation economy. To reach that vision, M7 is aligning regional players and key initiatives toward a unified regional agenda that:

- Catalyzes an innovation economy in the region through a forward-looking, comprehensive agenda.
- Aligns existing ideas and efforts, spotlights emerging opportunities, and introduces strategies based on the region's place-based assets.
- Suggests preliminary strategies that are grounded, measurable, and actionable.
- Identifies, aligns, and engages varied leadership and potential partners to implement and carry the strategies forward.

GOALS

The M7 region has three overarching goals that direct a comprehensive regional agenda of strategies and tactics for creating an innovation economy, culture, and place:

1. Grow, expand and attract businesses

Business expansion and attraction includes the direct marketing to, and project management of, companies looking to expand or move into the region, including Foreign Direct Investment (FDI) and trade missions.

2. Unite around a regional economic development agenda for growth

Align neighborhoods, communities, and counties around a strategic economic development framework and collaborate with external partners and resources to create and drive initiatives to address the framework.

3. Improve the region's business climate

Foster an economic climate, innovative mindset, and quality of life to retain, grow, and attract world-class companies and talent, and leverage the region's unique geo-economic position to grow the economy.

OBJECTIVES

To build an innovation economy on the region's existing economic base, a comprehensive regional agenda of objectives is organized around the overall economic development goals set forth above.

Goal 1: Grow, expand and attract businesses.

Objectives:

- Target market to companies with potential for expansion or attraction in the region (including FDI and trade missions); project manage businesses considering expanding or relocating, delivering single-source service.
- Engage and coordinate appropriate local and state economic development resources in regional business expansion and attraction efforts.
- Target manufacturers in northern Illinois to relocate business operations to the region.
- Undertake a Regional Call Program to contact local businesses and proactively address issues and facilitate expansion opportunities.

Goal 2: Unite around a regional economic development agenda for growth.

Objectives:

- Convene, collaborate, and coordinate with regional partners around the region's updated strategic framework, *The Milwaukee Region Framework for Economic Growth*, to build out strategies around the five levers of regional prosperity - innovation, human capital, industry clusters, infrastructure, and governance.
- Coordinate and partner with local economic development organizations at the county and city/town/village levels to provide economic development support.
- Convene, collaborate, and coordinate with the Regional Economic Partners group.
- Collaborate with the state's lead economic development organization, the Wisconsin Economic Development Corporation, and other state and national partners, including the U.S. Economic Development Administration and Brookings Institution, to engage and share best practices.

Goal 3: Improve the region's business climate.

Objectives:

- Sponsor/support collaborations and alliances with partner organizations to build the region's targeted industry sectors that export goods and services beyond regional borders and bring new income into the region
- Attract and retain talent to create a qualified and available workforce
- Foster and promote entrepreneurship and innovation to launch and grow companies
- Support public policy that improves the region's competitive standing
- Increase exporting to spur economic growth in the region, with a focus on small- and mid-sized companies

PERFORMANCE MEASURES

The M7 measures its overall success through new and retained jobs, and new investment in the region. The M7 produces an ongoing Performance Scorecard that tracks performance measures, including:

- Direct Jobs
- Direct Payroll
- New Capital Investment
- Total Jobs, Direct and Indirect
- Total Payroll, Direct and Indirect
- Total Projects
- Total Project Wins

The Performance Scorecard also tracks support from public-sector partners, which include:

- Federal Earmarks
- State Tax Credits
- Other State Assistance
- Tax Incremental Financing (TIF) Districts
- Other Municipal Assistance
- Foreign Investment (EB-5)

In addition to the performance measures listed above, the M7 and County EDO's will request that the sponsor of projects funded through EDA grants and businesses they assist through economic development incentives provide them with the following information:

- The number of new jobs created that were filled by residents of the local government in which the project or new or expanded business is located.

- Business corporate investments made during the calendar year in which the business received the assistance. Businesses reinvest a substantial amount of money back into the Region by way of park infrastructure, education, and other donations.

Through its work, the M7 team and its economic development partners have been involved in more than **200 projects** since 2005.

Results to date include **10,161** projected jobs (**5,740** jobs have been created or retained to date) in the region, with an impact of more than **\$301 million** in direct payroll and **\$731 million** in capital investment (see Figure VII-1).

PRINCIPLES AND ACTION PLAN

M7 focuses on three core principles to deliver economic development value for the region:

- Business Expansion and Attraction: Generating prospects and delivering single-source service
- Region Building: Uniting the seven counties around a cohesive regional agenda
- Business Climate Improvement: Improving the climate for economic development

As M7 moves into its third five-year strategic campaign and has the team and tools firmly in place to execute its mission, the organization is moving into more proactive, targeted, sophisticated approaches built on the foundation established during earlier campaigns.

Ongoing efforts will be to:

1. Continue Regional Expansion Outreach
2. Develop a Network of Site Selectors, Corporate Relocation Executives and Chief Executive Officers (CEOs)
3. Launch Target Cluster and Lead Generation Campaigns
4. Engage in Cluster Business Development
5. Improve the Climate for Economic Development
6. Achieve Greater Equity in Employment and Income.

County and local Economic Development Organizations (EDOs) also implement economic development activities and programs, often in cooperation with technical colleges, universities, units of government, and/or businesses. These activities complement the activities of the M7, and are described in this section. Additional information on university and technical college programs are described in Chapter VI, in the “Public-Private Relationships” section.

Following completion of the *M7 Framework for Economic Growth* Plan in early 2014, the City of Milwaukee prepared and adopted *Growing Prosperity: An Action Agenda for Economic Development in the City of Milwaukee*. *Growing Prosperity* identifies the actions that need to be taken by the City of Milwaukee and others to capitalize on the regional strategies presented in the M7 plan and this CEDS, so the City can thrive in the regional and global economies.

1. Continue Regional Expansion Outreach

CEO Calling Program to Top 75 Regional Companies

The purpose of the CEO Call Program is to speak one-on-one with CEOs to identify company-specific growth opportunities and threats, and to gain a first-hand understanding of the broader issues facing the top 75 companies in southeast Wisconsin. This is a follow up to earlier CEO calling programs conducted in several targeted sectors.

Several County EDOs also carry out CEO calling programs, and M7 will coordinate its efforts with the County EDOs. County calling programs are carried out by the Kenosha Area Business Alliance (KABA); the

Racine County Economic Development Corporation (RCEDC), in cooperation with Gateway Technical College and Racine Area Manufacturers and Commerce (RAMAC); Economic Development Washington County (EDWC); and the Waukesha County Business Alliance.

2. Develop a Network of Site Selectors, Corporate Relocation Executives (CREs) and CEOs

- Host group of site selection consultants in Region
- Outreach program to site selectors/CREs/CEOs
- Attend economic development/site selection conferences

Hosting site selection consultants lays the groundwork to initiate and develop business relationships while placing Southeastern Wisconsin in their minds as an option for future expansion/relocation decisions. This is a follow-up to a successful site selector group hosted in 2010 that produced several leads.

The outreach program to site selectors, corporate real estate executives, and CEOs provides consistent communication on the region's attributes through targeted and industry-specific marketing information about the region.

Attending conferences helps establish relationships with site influencers and builds awareness of the region.

County EDOs and county and local governments work to ensure that an adequate number of sites are available for business development. In addition to preparing comprehensive plans that identify suitable sites for commercial and industrial development, local governments may develop business parks and/or provide the infrastructure for park development. Financing for infrastructure and other site improvements is often provided through establishment of a Tax Increment Financing (TIF) District by the local government.

Other current or recent efforts to ensure an adequate supply of land and improvements for business development include:

- WEDC Locate in Wisconsin and Certified in Wisconsin websites. In 2015, there was one certified site in the Region, located in the City of West Bend.
- The M7 "Choose Milwaukee" website is a subset of the Locate in Wisconsin database for the seven counties in the Region.
- Racine County Industrial Land Absorption Study, recently updated to measure land absorption at existing business parks to help to determine future needs.
- KABA Feasibility Study of Industrial Park Development, underway in cooperation with local governments west of I-94.
- Washington County Site Revitalization Program, underway to remediate and redevelop brownfield sites.

3. Launch Target Cluster and Lead Generation Campaigns

Northern Illinois Calling Campaign

- One-on-one calls with CEOs and multipliers (brokers and site selectors)
- Develop database of Northern Illinois manufacturers
- Implement advance and follow-up marketing

M7 is developing a lead generation campaign by identifying, researching, and calling on manufacturing companies with an interest or potential interest in locating in Wisconsin from Northern Illinois and Chicago. Illinois has announced recent tax increases and the region has a competitive value proposition for Illinois

businesses in several sectors, especially manufacturing. M7 is working with county ED agencies and the state to set up introductory meetings with pre-qualified prospects and Chicago area site selectors and brokers.

International Calling Campaign

M7 has designated Western Europe as a long-term strategic target for the region, based on research and recent successes with six European manufacturing companies that have established operations in the region, including four from Spain. Milwaukee's value propositions and manufacturing heritage mesh well with Western European manufacturing. There is a large potential target market, with overall investment in the U.S. by companies from the top five European countries exceeding \$445 billion in the manufacturing sector.

- **Hannover: One-on-one company meetings and meetings with multipliers centered around Hannover Messe trade show**
To raise the profile of Southeastern Wisconsin and state among EU companies and to attract more FDI projects, M7 attends the Hannover Messe trade show in Hanover, Germany. This is one of the largest industrial trade shows in the world, with 6,000 exhibitors and 200,000 attendees. The show presents a unique cross-section of industrial technologies including automation, power, energy, and electrical components that align very well with the region's target clusters. This year, M7 represents met with over 60 European companies and brought several international prospects to the region.
- **Hesse or German geography sector development**
Target areas of Germany for sector development by capitalizing on recent investments to build relationships, develop a pipeline, and arrange qualified meetings with potential investors. Milwaukee's target sectors and robust assets that support manufacturing – workforce, location, educational system, and infrastructure –align well with German states like Hesse, which has a very strong manufacturing industry with sectors that include electrical and electronics, automotive supply, medical products, and mechanical engineering.
- **Northern Spain follow up: multiplier and company relationship development**
Spain has been specifically targeted as a growth market because several Spanish businesses have established U.S. operations in the region over the last several years. M7's recent mission to Spain has led to three business prospects planning to make visits to the region in 2014. Ongoing strategies include meeting with other locationally active companies that might fit Milwaukee's regional profile, developing relationships with industry and government associations, and identify strategic partnership targets for Milwaukee area companies.
- **Trade missions**
Trade missions open the doors for strategic partnerships for exporting companies in the region and foreign operations. In 2013, the region participated in the Governor's trade mission to China and hosted the Shunde delegation from China in the region.

4. Engage in Cluster Business Development

Engage Energy, Power, and Controls Cluster

The region is a U.S. center for advanced manufacturing in the energy, power, and controls sectors. Despite global challenges, manufacturing continues to be an essential component of the regional economy, exhibiting strong sales, profitability, and investment trends. The region ranks second nationally for manufacturing employment per capita. Global industry leaders like Rockwell Automation, Johnson Controls, ABB, Rexnord and DRS Technologies are headquartered in Milwaukee or have significant business operations here.

Partner with the Mid-West Energy Research Consortium

M7 partners with the Mid-West Energy Research Consortium (M-WERC) to support industry expansion for new and member companies like Rockwell, DRS, and American Transmission, by harnessing the resources of Wisconsin's universities and technical colleges to provide cutting-edge consulting, research, and workforce development. With a vision to make Wisconsin and the Midwest the leader in energy, power, and controls, M-WERC develops strategic partnerships between academic institutions, industry, government, and other organizations to grow the cluster and improve its competitiveness.

Current initiatives include:

- Develop \$9.6M Energy Innovation Center (EIC) at Century City Tower in the City of Milwaukee's 30th Street Corridor, providing space for Research and Development (R&D), entrepreneurial training, and workforce development, targeted to open in September 2015
- Within the EIC, establish an incubator focused on developing building products for energy efficiency and advanced manufacturing
- Continue to fund collaborative and transformative energy-related seed research between corporate partners and academic institutions

Develop Food & Beverage Cluster

There are more than 300 food and beverage manufacturing companies in the region, employing nearly 15,000 people, including the third-largest concentration of food scientists in the nation. Wisconsin overall is home to more than 1,000 food processing firms that employ 62,000 people and have combined gross annual revenues of \$10 billion. Nationally, Wisconsin ranks among the top ten agricultural states in the U.S.

- Partner with FaB Wisconsin
FaB Wisconsin, the region's food and beverage industry network, now reaches more than 400 companies and 700 executives in the industry. FaB leverages the region's strength in food and beverage manufacturing to drive economic growth in the areas of talent, innovation, and business development. Recently, FaB's Advisory Council worked closely with Milwaukee Area Technical College to develop food manufacturing and food science technical degree and diploma programs that were offered for the first time in fall 2013.

Current initiatives include:

- Support development of the Milwaukee Area Technical College Food Maker School and Innovation Center
- Secure funding and develop mentor base for FaBcelerator start-up accelerator program
- Launch a food company financing accelerator
- Expand FaB's career pathways beyond technical colleges to high schools and four-year colleges and universities

Support Water Technologies Cluster

The Southeastern Wisconsin Region lies on the shores of the greatest single source of fresh water on the planet, the Great Lakes. Situated along Lake Michigan and uniquely spanning both the Great Lakes and Mississippi River watersheds (the two largest watersheds in the United States), the region is blessed with abundant fresh water resources, world-class research institutions and the highest concentration of water-related companies in North America, making it a world hub of water technology, research, and policy.

The region's water industry is a \$10.5 billion market, supporting 20,000 jobs and accounting for 4 percent of the total world water business. More than 130 water-related companies locate operations here, including five of the 11 largest water firms in the world.

- Partner with The Water Council
The Water Council, headquartered in Milwaukee and the first organization of its kind in the United States, is aligning the regional fresh water research community and water-related industries to establish the region as the world water hub for water research, economic development, and education.

The Water Council is advancing the region's global position by becoming a magnet that attracts creative talent, innovative ideas and is recognized as a water leader in tomorrow's world. M7 partners with the Council as it focuses on a number of key areas to further its mission:

- Talent/Education
- Corporate-University Linkages
- Global Communications
- Policy
- Grow Sales, Exports, and Jobs
- Develop Solutions to Address Water Challenges Around the World
- Water Stewardship

Current initiatives include:

- Launch next round of technology start-ups in the BREW business accelerator program at the Global Water Center, unleashing unique businesses that address global freshwater challenges
- Partner to create the Water Collaborative Innovation Platform, a web-based search, innovation management, and analytics tool that will enable researchers worldwide to conduct the most complete data mining of water research information that has ever existed
- Continue development of the Global Water Technology Park at Reed Street Yards property, creating a research and technology hub focused on Milwaukee's growing water industry
- Support and partner with the University of Wisconsin-Milwaukee's School of Freshwater Sciences, which has recently expanded with a \$53 million, 100,000 square foot addition

5. Improve the Climate for Economic Development

Workforce Development

- Develop Regional Workforce Strategic Framework
M7 is leading a regional workforce development initiative that is engaging the Regional Workforce Alliance (RWA), which consists of representatives from business, the workforce development centers in the region, and the region's technical colleges, to develop a strategic framework for workforce development and address the skills gap of a misaligned workforce without the skills to meet the needs of employers, especially in the manufacturing sector. A Talent Advisory Council has been formed by the M7 to work with the RWA.

Workforce development programs and strategies should address the following:

- Align workforce development structure with growth opportunities in key industry and large employment clusters.
- The City of Milwaukee has established a Resident Preference Program (RPP) that requires that 40 percent of hours worked under City-let construction contracts or on projects within a City Tax Incremental Financing District are by City residents who fit specific unemployment or underemployment criteria. Other county and local governments with a high percentage of census tracts in economic distress due to high unemployment levels could consider enacting residence preference programs for EDA-funded construction projects sponsored by the county or local government. The enactment of such programs may require cooperation with workforce development agencies to ensure that workers with the necessary skills are available.

- County and local governments with high percentages of formerly incarcerated residents should work with workforce development boards and other partners to:
 - Expand transitional jobs programs for released inmates and for offenders diverted from incarceration, such as the “Compete Milwaukee” program.
 - Establish job training programs for released inmates, focusing on construction and manufacturing jobs.
 - Facilitate local employers’ pursuit of hiring practices that are more inclusive of ex-offenders.
- Consider expanding internships, job shadowing opportunities, part-time summer jobs, and career academies for high school and college students.
- Continue efforts to develop a Regional Certificate of Employability, which would include reaching a regional consensus on non-technical (“soft” skills) most sought by employers. Standards to measure and certify that potential employees possess the desired skills and high school and technical college programs to help potential employees develop these skills should also be developed.
- **Windows to Work**
 Programs such as Windows to Work, a joint effort between the Wisconsin Department of Corrections and workforce investment boards, should be expanded to improve employment readiness, including restoration and repair of a driver’s license if feasible. Those unable to secure or repair their license should be given assistance obtaining a state photo ID. Obtaining a driver’s license and clearing up license suspensions and revocations should be a priority employment initiative for those already released into the community. Windows to Work should also continue to assist participants with developing work skills and securing education, healthcare, child care, and housing assistance as necessary.
- **Closing the Skills Gap Initiative – Manufacturing Careers Partnership**
 In spite of high unemployment in some areas, companies in the region continue to have difficulty in finding qualified workers. As the economy grows and the workforce continues to age, this issue will only become more acute. M7 and partner organizations established the Manufacturing Careers Partnership (MCP), which offers a voice to manufacturers in developing, qualifying, and attracting a trained talent pool in region-wide coordination with educators and workforce development agencies. In 2013, MCP created a Welding 101 curriculum that is offered by technical colleges across the state to meet the demand for entry-level welders. The success of this project has led to the initiative being replicated to train CNC (Computer Numerical Control) workers.
- **"Dream It. Do It." Marketing Campaign**
 Manufacturers in the region have repeatedly said that finding qualified workers with the skills needed to operate complex, computer-controlled machinery is the top business challenge they face. "Dream it. Do it." is a national recruitment strategy sponsored by the National Association of Manufacturers designed to re-brand manufacturing as an industry providing high-paying, high-quality careers. Targeted at young people ages 17 to 27, the initiative will first be implemented in the M7 region, and eventually unveiled statewide. Wisconsin is the 20th region nationally to implement the program.
- **Manufacturing Tours**
 This pilot program of manufacturing company tours provided students, parents, and educators the opportunity to explore and understand the careers that exist in manufacturing today and in the future to meet the employment needs of local manufacturers. Both KABA and the Waukesha Business Alliance

sponsor Schools2Skills tours of manufacturing establishments to learn more about career options and the working environment.

- **Training Programs**
Many county EDOs, often in cooperation with the Technical College serving the county, conduct training classes for existing employees of area businesses or for persons who want to obtain certification. Examples of the former include training courses sponsored by KABA, in cooperation with Gateway Technical College, UW-Parkside, and Carthage College; RCEDC in cooperation with Gateway Technical College, UW-Parkside, and Racine County Workforce Development; WCEDA in cooperation with Gateway Technical College and UW-Whitewater; and OED and EDWC in cooperation with Moraine Park Technical College and the Waukesha-Ozaukee-Washington Workforce Development Board.
- **Talent Dividend Initiative**
The Talent Dividend Initiative aims to increase the number of college graduates in the region through better college access, easier credit transfers between schools, and systems that help returning adults and current students complete their degrees on time. Studies from CEOs for Cities show that even a one percentage point increase in four-year college degrees in the region, or roughly 13,000 graduates, would translate into an additional \$1.5 billion in total income for the Region.
- Recruitment Events, such as job fairs, are conducted by several county EDOs.

Talent Attraction and Retention

- Support FUEL Milwaukee and similar networking programs

FUEL Milwaukee is the leading organization addressing talent attraction and retention for the M7. Its mission is to establish Southeastern Wisconsin as the region of choice for world-class talent. FUEL specializes in helping companies and individuals connect in the increasingly competitive, ever-changing world of work. FUEL's 6,000 members represent nearly 400 employers of all sizes from across the region.

Several County EDOs have organizations similar to FUEL Milwaukee. Groups to encourage networking among younger professions include RAMAC's YPR, KABA's Young Leaders in Kenosha (Y-link), and the Waukesha Business Alliance Young Professionals groups. Other networking groups sponsored by County EDO's include the Waukesha Business Alliance Networking After 5 and Women's Development Network.

- Several county EDOs sponsor leadership development programs for local employees. Programs include Leadercast Kenosha, Leadership Walworth, and Leadership Waukesha County.
- **KABA Catalyst2Careers Scholarship Program**
KABA provides financial assistance to students who attend local colleges and universities in pursuit of high-demand careers through the Catalyst2Careers Scholarship Program. Annual scholarships are offered to high school seniors in the Kenosha area whose actions link personal interests and talents with various career options, and who are pursuing post-secondary education within Kenosha County. Scholarships are awarded to students who intend to pursue a major or career path in math, science, technology, medicine, engineering, business, finance, or accounting.
- Establish branding, events, and internship opportunities designed to better connect students at colleges and universities in the Region with the assets and opportunities of the larger community, with the goal of retaining more graduates.

Entrepreneurship

- **Support BizStarts Milwaukee**
BizStarts, the regional entrepreneurial initiative, is an outgrowth of the M7 Strategic Framework and is now a stand-alone entity. It focuses on connecting entrepreneurs with the resources to launch and grow their companies. BizStarts assists with business planning, connecting with early-stage investing and other issues that face start-ups. BizStarts' Venture Track mentoring component has been involved with at least 50 "high growth" start-ups that have launched with early stage capital over the last four years. These companies currently employ more than 550 full-time employees and have attracted \$114 million in early stage capital investment.
- **Support MiKE and Scale Up Milwaukee**
Innovation in Milwaukee (MiKE) is a cluster initiative of the M7 that's developing high-tech talent for design and technology start-ups. MiKE is one of the lead partners in Open for Enterprise, which chose Milwaukee for the first-ever project in the U.S. to build upon start-up expert Daniel Isenberg's methodologies to fuel entrepreneurship in the region. Organized through Scale Up Milwaukee, the program will produce an actionable blueprint for Milwaukee that can help lead to a measurable increase in start-ups and successful scale-ups.

Scale Up Milwaukee is accelerating the region's entrepreneurial ecosystem by delivering new activities and bolstering existing efforts throughout the region to help young companies grow. Initiatives include developing new educational programs and collaborating with local economic development groups to spur even more startup growth. One specific program is Scalerator, an intense six-month training and mentoring program for business owners who are extremely motivated to scale up and grow their businesses.

- **Gateway Technical College LaunchBox**
LaunchBox provides access to business development support and resources from 10 partner organizations to entrepreneurs seeking to start a business in the City of Racine and ongoing assistance for emerging and established businesses. LaunchBox has numerous resources for business plan assistance, licensing and permitting, financing, business education, business training, workforce development and staffing, product development, and sales and marketing. A co-working space in downtown Racine is also available to help remove barriers to new companies that are not ready to lease their own workspace.
- **Waukesha County Small Business Alliance**
Small Business Alliance member businesses (around 50 employees or fewer) meet every other month for networking, referrals, and education. Speakers focus on topics tailored to meet the specific needs of small and growing businesses. Topics include goal-setting, marketing, legal and financial issues for small businesses, innovation, regulations, and cost-saving.
- **Business Lending Partners**
Business Lending Partners (BLP) is a private non-profit organization licensed by the U.S. Small Business Administration (SBA) as a Certified Development Company (CDC) to process and service SBA 504 loans. SBA 504 loans provide long-term, fixed-rate financing options for real estate and equipment needs. BLP was established in 1983 and is the only CDC headquartered in Southeastern Wisconsin. Eligible uses of SBA 504 loan funds include land and building purchases and renovations, building construction, machinery and equipment, furniture and fixtures, leasehold improvements, inventory, working capital, environmental remediation, and limited refinancing of real estate and equipment loans. Typically, a private lender covers about 50 percent of the total cost while BLP covers up to 40 percent, with the borrower contributing 10 percent. BLP also administers Revolving Loan Funds (RLFs) for Racine and Waukesha Counties, the Cities of Burlington and Racine, and the Village of Union Grove.

- **UW-Extension Small Business Development Centers**
The UW-Extension Small Business Development Centers (SBDC) offer free one-on-one counseling to business clients who are considering starting a business and existing businesses. The SBDC draws upon a large group of business professionals who specialize in marketing and sales, business planning, buying and selling a business, financial management, product development, accounting and bookkeeping, customer service, and inventory control. SBDC offices in the Region are located at UW-Whitewater, serving Walworth and Waukesha Counties in addition to three counties outside the Region; UW-Parkside, serving Kenosha and Racine Counties; and UW-Milwaukee, serving Milwaukee, Ozaukee, and Washington Counties.
- **WCTC Small Business Center**
The Waukesha County Technical College (WCTC) operates a Small Business Center, which focuses on helping small business entrepreneurs start and grow small businesses. The Center primarily serves micro-business owners (one- or two- person businesses with less than five employees). The Center offers several short, non-credit courses taught by practicing professionals that help build the knowledge foundation of small business owners. In addition, the Center offers free counseling and mentoring services and networking events.

Funding

A number of County EDOs administer County Revolving Loan Funds and/or other funding programs to assist in attracting economic development projects. Projects typically receive funding if they will create jobs in the County. A number of cities and villages in the Region also administer economic development funding programs, typically revolving loan funds established through Community Development Block Grants.

Examples of financial assistance programs carried out by County EDOs include:

- Kenosha County High Impact Fund and the Revolving Loan Fund, both administered by KABA.
- Milwaukee County Revolving Loan Fund, administered by the Milwaukee Economic Development Corporation.
- Ozaukee County Revolving Loan Fund, administered by OED.
- Racine County Revolving Loan Fund, administered by Business Lending Partners.
- Walworth County Revolving Loan Fund, administered by WCEDA.
- Washington County Revolving Loan Fund, administered by EDWC.
- Waukesha County Revolving Loan Fund, administered by the Wisconsin Business Development Finance Corporation.

Assistance to Local Governments

Several County EDO's provide assistance to local governments, on request, to administer or implement economic development programs, grants, and revolving loan funds. Examples include:

- KABA- Supports Downtown Kenosha, Inc. to implement the Main Street program to continue revitalization efforts in the City of Kenosha downtown area. KABA is also working with the City of Kenosha to redevelop the former Chrysler engine plant site.

- RCEDC- Administers façade grant programs for the City of Burlington and Village of Union Grove and a curb appeal grant program for the Village of Waterford. RCEDC also administers the Downtown Commercial Business Rent Assistance Grant program for the Village of Union Grove, prepared a Downtown Market Analysis for the Village of Waterford in 2013, and administers a brownfield redevelopment initiative for the City of Racine, including management of multiple assessment and cleanup grants funded by the Wisconsin Department of Natural Resources (DNR) and the U.S. Environmental Protection Agency (EPA).
- OED- Administers revolving loan funds for the Cities of Mequon, Cedarburg, and Port Washington, and the Villages of Grafton and Saukville
- WCEDA- Administers revolving loan funds for the Cities of Delevan, Elkhorn, and Whitewater, and the Village of East Troy.

Public Policy

- **Improve the Region’s Competitive Standing**
The M7 Regional Policy Committee recommends support for public policy that improves the region’s competitive standing. The committee continues to support creating and expanding incentive tools that help Wisconsin compete on a level playing field in today’s national and global marketplace. M7 lobbied for the state Jobs Tax Credit, a valuable new tool that gives a company creating jobs in Wisconsin up to 10 percent of wages for up to 10 years.
- **Foreign Investment**
To attract foreign investment, M7 worked with the U.S. Department of Homeland Security to become a designated Regional Center for the EB-5 Immigrant Investor Visa Program. The program offers green cards to qualifying foreign investors and their families who invest a minimum of \$500,000 in businesses and create 10 full-time jobs for U.S. workers. Since it was initiated in 2007, this program has attracted \$250 million from foreign investors.
- **Foreign Trade Zone**
First authorized by the Foreign Trade Zones Act of 1934, Milwaukee’s long-standing Foreign Trade Zone — the country’s 41st — is expanding after being an underutilized economic development tool. A new overseer, the Port of Milwaukee, has taken over the role from a private firm.

M7 advocated for the change in oversight and will promote the benefits of zone use for economic development and creation and retention of jobs in the region. The eligibility requirements and the area of the FTZ have also been enlarged, making more companies eligible for the program.
- **Implementation of the Regional Transportation Plan**
The M7 and State, County, and local governments should work to implement the regional transportation system plan prepared by SEWRPC. The regional transportation plan seeks to provide a multi-modal transportation system with high quality public transit, bicycle and pedestrian, and arterial street and highway elements which add to the quality of life of Region residents and support and promote expansion of the Region’s economy by providing for convenient, efficient, and safe travel by each mode. A sound and reliable transportation system is necessary to ensure the timely movement of freight and to ensure that workers can readily access job locations, including access for households that rely on public transit for travel to work and training opportunities.
- **Continue Efforts to Provide Housing Affordable to the Region’s Workforce**
Economic development agencies, SEWRPC, and businesses will continue to work with local governments to inform them of the need for affordable workforce housing within a convenient

commuting distance of area businesses. The regional housing plan prepared by SEWRPC includes recommendations for providing housing affordable to a community's workforce and for providing transit services to provide connections between existing areas of affordable housing and job centers.

- ***M7 Regional Export Initiative***

M7 has targeted exporting as a key initiative to spur growth in companies in the region, with a focus on small- and mid-sized firms. Through the efforts of M7, the Southeastern Wisconsin Region was one of eight U.S. metro areas selected in 2013 for the Global Cities Initiative, a high-profile program established by the Brookings Institution to expand global trade and exporting. One of the first steps for the region will be to design and implement a regional export strategy and action plan in 2014. Exporting is imperative to the success of the region - new realities are that 75 percent of the world's purchasing power is outside the U.S., and 80 percent of the world's economic growth over the next decade will occur beyond U.S. borders.

6. Achieve Greater Equity in Employment and Income

As documented in Chapter VI, a number of areas in the Region meet EDA criteria for economic distress based on high unemployment levels and/or low incomes. Map VI-4 illustrates that a number of census tracts in the Cities of Kenosha, Milwaukee, and Racine have unemployment rates more than twice the national average, and five tracts in the City of Milwaukee have unemployment rates more than four times the national average. All of the census tracts with unemployment rates more than twice the national average have a higher percentage of minority residents than the regional average.

Led by the M7, efforts are underway to address these issues by undertaking a variety of business development activities. Such activities are focused on the ultimate goal of creating within the Region more family supporting jobs, while expanding the tax base and increasing personal incomes. County and local governments, economic development organizations, workforce development agencies, nonprofit organizations, and others are cooperating in these efforts, which include:

- Preparation and adoption of this CEDS, which will make county and local governments with economically distressed areas eligible to apply for EDA grant assistance for projects intended to benefit such areas.
- Implementation of workforce development strategies and programs designed to increase incomes and jobs, including in areas with high unemployment and areas impacted by high percentages of residents that were previously incarcerated. Existing and proposed programs are included under the "Workforce Development" section of this Chapter.
- The Transform Milwaukee initiative, which is a partnership of state, federal, and regional agencies; the City of Milwaukee; and private foundations and nonprofit groups to redevelop abandoned industrial sites and residential properties in portions of the City of Milwaukee and the area around Mitchell airport. Focus areas include the 30th Street Corridor, which is surrounded by areas of high unemployment. Transform Milwaukee is working to create new businesses and jobs, provide educational and job training opportunities, address flooding problems, and improve transportation facilities.
- Develop the Center for Advanced Manufacturing at Century City (part of the 30th Street Corridor, surrounded by areas of high unemployment) to provide training for good-paying jobs in the manufacturing industry.
- Continued assistance to small businesses, including through efforts of the Small Business Development Centers, the WCTC Small Business Center, and the WEDC Minority Business Development Revolving Loan Fund, among others.

- Continued efforts to secure reliable, dedicated local funding sources to adequately support public transit systems in the Region, in accordance with the recommendations of the regional transportation system plan. A reliable, efficient, and areawide public transit system is essential to enable low and moderate income residents in the Cities of Kenosha, Milwaukee, and Racine to access jobs, job training facilities, and educational institutions.

INTEGRATION WITH STATE ECONOMIC DEVELOPMENT EFFORTS

The Wisconsin Economic Development Corporation (WEDC) is the economic development organization for the state. It was created in 2011, replacing the Wisconsin Department of Commerce. The primary purpose of this initiative was to create an entity that is devoted exclusively to economic development activities in Wisconsin. The WEDC is a public-private corporation run by a board of directors that consists of 13 voting members, including the governor, who serves as chairman.

One of WEDC’s key strategies is to engage, support, and better align the more than 600 economic development resources of Wisconsin into an extended enterprise – Accelerate Wisconsin – to achieve superlative retention and attraction performance through more coordinated, consistent, and responsive efforts.

To that end, M7 is aligning as closely as possible with WEDC and engaging in its strategic goals for maximum impact, taking the lead or assisting in economic development efforts where appropriate. M7 receives regional partnership grants from WEDC for efforts focused on accelerating regional alignment and capacity building. This funding is applied for on an annual basis.

The WEDC CEO is a member of the M7 Executive Partners group. This group reviews, suggests, and helps implement strategies for the region.

The following is an outline of strategic actions that M7 is engaging in to align with the strategies employed by WEDC to achieve key performance goals established for the state of Wisconsin and the WEDC network.

In addition and most importantly, M7 will call on, and rely on WEDC engagement, to market to and close project opportunities for companies expanding in the region and for companies interested in moving into the region. M7 will lead, follow up on provided leads, and will incorporate WEDC activities as necessary and requested by WEDC.

State Strategy 1: Enable a world-class, high performing economic development network

Key strategic actions:

- **Link Workforce and Economic Development**
Workforce and ED strategies are linked through M7’s Regional Workforce Alliance (RWA), consisting of representatives from business, the workforce development centers in the region, and the region’s technical colleges. M7 is leading a regional workforce development initiative that is engaging the RWA with participation from WEDC and the Wisconsin Department of Workforce Development.

Align Regional Responsibilities of Key Partners to Facilitate Coordination

M7, SEWRPC, and the REP have partnered to provide the basis for this comprehensive economic development strategy, which is intended to meet federal guidelines for accessing EDA funds.

- **Deploy Supporting Tools**
Common tool development includes the implementation of Salesforce as the retention analysis and communication device for the top 75 companies in the region, and MilwaukeeProspector.com as the property

sites and buildings database for the region. M7 will also work with the state and other regional groups to promote state-wide marketing and branding where appropriate.

State Strategy 2: Game-changing Policy Implementation

M7 will continue to apprise WEDC of game-changing policies and make policy recommendations based on ongoing business climate assessments and market insights. M7 was a key facilitator in the state's adoption of the jobs tax credit program, and with support from Metropolitan Milwaukee Association of Commerce (MMAC) lobbyists and the business community, was a key advocate for the program's expansion. M7 will work with WEDC and M7's partners to promote policy changes at the state agency and legislative levels. M7 is working with federal agencies to promote a regional strategy as well as a global attraction strategy, currently focused on Europe. WEDC is welcome to participate and M7 will share its experiences to benefit the region and state.

State Strategy 3: Marketing

Key Strategic Actions:

- M7 is investing significant time and resources in target marketing to Northern Illinois and Europe on behalf of the region and state. As these initiatives get underway and as leads surface, M7 will engage WEDC and local partners where appropriate. WEDC and local partners are welcome to participate at any time. M7 has called upon both the WEDC and local partners, which are currently providing input and support for both activities.
- M7 supports the Milwaukee Economic Development Corporation's establishment of a regional revolving loan fund on behalf of the region for venture funding, and has marketed this fund to the county EDO's and at M7 Council meetings.

State Strategy 4: Cluster Development

Key Strategic Actions:

- M7 has engaged WEDC and the state Department of Workforce Development in its cluster building activities, specifically advanced manufacturing, food and beverage manufacturing, and water technology.
- M7 will engage WEDC in its marketing efforts in the fields of energy, power and controls, water technology, and food and beverage manufacturing, through the Mid-West Energy Research Consortium (M-WERC), The Water Council, and FaB Wisconsin organizations, respectively.

State Strategy 5: Entrepreneurship

See new Venture fund support under State Strategy 3

State Strategy 6: International Business Development

Key Strategic Actions:

- M7 will engage WEDC in its efforts to target market to specific industries in Europe, primarily Germany and Spain, but including France, Italy, the Netherlands and Great Britain, as well as others. Engagement can include financial support, participation in lead generation trips, project development trips, and deal making trips and activities.

- M7 will also engage WEDC in promoting Wisconsin as a Foreign Direct Investment location and as a place with businesses having export potential. These activities are more trade mission-like with a strong focus on what individual companies and clusters can do for other regions and companies around the world. M7 will work closely with the Wisconsin Manufacturers Extension Partnership (WMEP), the counties, and the MMAC as well.

Figure VII-1

MILWAUKEE 7

DRIVING ECONOMIC GROWTH



Scorecard

Performance Measures	2005-2009	2010-To-Date	Goal
Completed Project "Wins"	12	46	
Estimated Jobs *	3,220	7,390	6,440
Actual Jobs**	2,449 (76%)	3,291 (48%)	N/A
Payroll	\$144M	\$157M	N/A
Average Wage	\$58,799	\$47,705	\$45,000
Indirect Jobs	4,105	5,843	N/A
Direct + Indirect Jobs	6,554	9,134	N/A
Direct + Indirect Payroll	\$289M	\$357M	N/A
Capital Investment Pledged	\$156M	\$657M	N/A

* Results based on company projections at time of M7 engagement

** Actual jobs recorded as of 2010, 2014 respectively

Additional Investment & Jobs from EB-5 (2007-To-Date)

	Total
Total Investors	505
Capital Invested	\$252.5M
Jobs Attributed	5,050



CHOOSEMILWAUKEE.com and Mke7.com

Updated: 6/1/2015

Source: M7.

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY FOR SOUTHEASTERN WISCONSIN: 2015 - 2020

Chapter VIII

ONGOING AND PROPOSED ECONOMIC DEVELOPMENT INVESTMENTS IN THE REGION

INTRODUCTION

As noted in Chapter I, the purpose of this comprehensive economic development strategy (CEDS) report is three-fold. First, the document is intended to provide a basis for a more widespread understanding of the ongoing economic development work program in the Region and, to that end, draws heavily upon work of the M7 organization. Second, the document is intended to meet the requirements of the U.S. Economic Development Administration (EDA) for such work, thereby buttressing efforts to secure Federal funding for projects in the seven county Region that have a particular focus and impact on advancing economic development. Third, the document is intended to provide a basis whereby the EDA can consider creation of an Economic Development District in southeastern Wisconsin.

EDA GRANT PROGRAMS

EDA's grant programs are intended to support local and regional economic development efforts by providing economically distressed communities and regions with resources to address economic needs. EDA programs are designed to lead to the creation and retention of jobs and increased private investment.

Ongoing EDA grant programs are listed below. Proposed projects must be consistent with the economic development strategic plan adopted by the county or local government applying for funding. Projects proposed for EDA funding within an Economic Development District (EDD) designated by EDA must be consistent with a CEDS adopted by the EDD and a majority of counties in the District, and approved by EDA.

- **Public Works Program** supports locally developed projects targeting long-term economic self-sufficiency. Examples of infrastructure investment projects include new or improved water and sewer facilities, rail spurs, and technology related infrastructure.
- **Economic Adjustment Program** predominantly supports grant activities for strategic planning, project implementation, and revolving loan funds. Activities may include creation/expansion of strategically targeted business development and business financing programs, construction of infrastructure improvements, and industry research and analysis.
- **Technical Assistance Program** grants often support feasibility studies for potential projects such as industrial parks and business incubators, or for the development of revitalization or tourism plans.

- **Short-term Planning Grants** assist in economic development planning and implementation, multi-jurisdictional efforts, and programs designed to create and retain permanent jobs and increase incomes. EDA may award grants under this program to assist with the development of a CEDS.

Generally, the amount of an EDA award may not exceed 50 percent of the total cost of a project. Projects may receive an additional amount, not to exceed 30 percent of total project cost, based on the relative needs of the region in which the project will be located (typically a 24-month unemployment rate at least 225 percent above the national average or a per capita income less than 50 percent of the national average). EDA determines if a project will be eligible for a greater federal match. EDA grants awarded nationwide in 2014 ranged from \$125,000 to \$4.6 million, with an average award of \$1.05 million.

Eligible applicants for EDA financial assistance under the Public Works and Economic Adjustment Assistance programs include:

1. An Economic Development District
2. An Indian Tribe or a consortium of Indian Tribes
3. A State, county, city, or other political subdivision of a State, including a special purpose unit of a State or local government engaged in economic or infrastructure development activities, or a consortium of political subdivisions
4. An institution of higher education or a consortium of institutions of higher education
5. A public or private non-profit organization or association acting in cooperation with officials of a political subdivision of a State.

EDA is not authorized to provide grants or cooperative agreements to individuals or to for-profit entities.

Grant applications are typically accepted each quarter of the year. Any eligible applicant may apply. Grant applications for projects within the Southeastern Wisconsin Region are submitted to EDA's regional office in Chicago. EDA staff will review and evaluate all applications submitted; no prioritization of applications within an EDD is required. If an EDD exists, EDD staff may assist with preparing the application and may also act as the grant administrator if the application is successful.

If an EDD exists, any eligible applicant within the District may submit an application if the proposed project will benefit an area(s) of economic distress. If the Southeastern Wisconsin Region is not designated an EDD, only those county or local governments or institutions of higher learning located in an economically distressed community and proposing a project that will benefit the economically distressed area is eligible to receive funding.

An EDA staff person reviews complete applications from eligible applicants and evaluates each application based on the following criteria:

1. The project's demonstrated alignment with at least one of EDA's Investment Guidelines (see below)
2. The project's ability to foster job creation and promote private investment in the regional economy
3. The project's feasibility
4. The project's sustainability/durability
5. The applicant's organizational capacity
6. The project's alignment with the regional CEDS. (Note: If an EDD has not been designated, the county or local government may base its application on a relevant economic development strategic plan adopted by the local or county government).

For each of the above factors, EDA staff will assess the application as "Excellent," "Very Good," "Satisfactory," "Poor," or "Unacceptable" and prepare a written report substantiating the rating assigned for each criterion.

Grant applications are then reviewed by an Investment Review Committee (IRC) made up of at least four EDA staff, including at least one EDA staff from the national office. The IRC applies the following selection factors to each application, listed in descending order of importance:

1. Comparative strengths of the application as determined by the EDA staff review described above
2. The extent to which the application meets EDA Investment Guidelines (listed below)
3. The comparative ability of the applicant and the proposed project to realistically achieve the desired results and catalyze additional resources
4. The ability of a project to start quickly and create jobs faster
5. The extent to which the project will enable the community/region to become more diversified and more economically prosperous
6. The relative economic distress of the region
7. The comparative financial or management capability of the applicant
8. The applicant's performance under previous Federal financial assistance awards, including whether the grantee submitted required performance reports and data
9. The availability of program funding
10. The extent to which the project supports EDA's goals of geographic balance in distribution of program funds, project types, organizational type (to include smaller and rural organizations) and the overall portfolio.

Based on its consideration of the above factors, the IRC will prepare a priority funding order for the applications and recommend to the EDA Regional Director, in priority order, those applications that merit consideration for EDA funding. The EDA Regional Director makes the final decision on projects that will be funded.

EDA INVESTMENT GUIDELINES

The EDA has identified the following national investment priorities and guidelines to evaluate and compare applications for EDA funding:

1. Collaborative Regional Innovation

Initiatives that support the development and growth of innovation clusters based on existing regional competitive strengths. Initiatives must engage stakeholders; facilitate collaboration among urban, suburban, and rural areas; provide stability for economic development through long-term intergovernmental and public/private collaboration; and support the growth of existing and emerging industries.

2. Public/Private Partnerships

Investments that use both public and private sector resources and leverage complementary investments by other government/public entities and/or nonprofits.

3. National Strategic Priorities

Initiatives that encourage job growth and business expansion in clean energy; green technologies; sustainable manufacturing; information technology (e.g., broadband, smart grid) infrastructure; communities severely impacted by automotive industry restructuring; natural disaster mitigation and resiliency; access to capital for small and medium sized and ethnically diverse enterprises; and innovations in science, health care, and alternative fuel technologies.

4. Global Competitiveness

Investments that support high-growth businesses and innovation-based entrepreneurs to expand and compete in global markets.

5. Environmentally-Sustainable Development

Investments that encompass best practices in “environmentally sustainable development,” broadly defined, to include projects that enhance environmental quality and develop and implement green products, processes, and buildings as part of the green economy.

6. Economically Distressed and Underserved Communities

Investments that strengthen diverse communities that have suffered disproportionate economic and job losses and/or are rebuilding to become more competitive in the global economy.

ELIGIBILITY

Each EDA regional office determines project eligibility, but it is generally based on an averaged 24 month unemployment rate of one or more percentage points above the national rate, and/or average annual per capita incomes 80 percent or less than the national average. As documented in Chapter VI, 223 of 529 census tracts, or 42 percent of census tracts in the Region, met EDA criteria as economically distressed areas in May 2015. Over one-third of census tracts in Kenosha, Racine, and Walworth Counties and over half the census tracts in Milwaukee County met the economically distressed criteria. Less than 10 percent of census tracts in Washington and Waukesha Counties and none of the census tracts in Ozaukee County met economic distress criteria. Areas in the Region that met EDA economic distress criteria in May 2015 are shown on Map VI-1 in Chapter VI.

SOUTHEASTERN WISCONSIN ECONOMIC DEVELOPMENT PROJECTS

Ongoing and proposed economic development projects in the Southeastern Wisconsin Region are shown on Tables VIII-1 and VIII-2. The projects were identified by the Regional Economic Partners (REP) group, with additional assistance from economic development departments from cities in the region and Wisconsin Economic Development Corporation staff. Each project is related to one or more of the nine economic development strategies described in Chapter VI. The strategy number(s) is indicated in the first column of the tables.

Projects were prioritized based on the extent to which they will implement one of the nine economic development strategies. Each project was scored by SEWRPC and the results were reviewed by REP members. Proposed projects were given 5 points for each strategy they would directly help implement, and 3 points for each strategy they would indirectly help implement. Projects were also awarded 5 points if located in a community that has economically distressed areas, or if the project would benefit the entire region. Projects with a total score of 13 points or more and that would directly implement at least one of the strategies are included on the Tier I list, and all others submitted for inclusion in the CEDS are on the Tier II list. Projects on the Tier I list are considered higher priority than Tier II projects from a regional perspective.

If EDA approves designation of the Region as an Economic Development District, EDA will require the submission of an updated CEDS performance report annually. The annual performance report, in addition to reporting progress on CEDS implementation, may propose new economic development projects in the Region or re-prioritize the projects included in this CEDS.

Table VIII-1

PROPOSED SOUTHEASTERN WISCONSIN ECONOMIC DEVELOPMENT PROJECTS: TIER I

Strategy Number ^a	County/ Counties	Local Government ^b	Project Title	Project Description	Preliminary Estimated Cost	Proposed Funding Sources	Estimated Start Date
1, 2, 3, 4, 6	M7 Region	Multiple	Business Growth Services	Build out continuum of services such as Scale Up Milwaukee, Economic Gardening, Cluster Accelerators, BizStarts, etc. (also see M7 Export Initiative in next row)	TBD	TBD; private, local, State, and Federal stakeholders	Underway
4	M7 Region	Multiple	M7 Export Initiative/Brookings Global Cities Initiative	Assist area firms in developing export strategies and plans, with a focus on small- and mid-sized firms	TBD	M7, WMEP, WEDC, World Trade Association	Underway
8	M7 Region	Multiple	Milwaukee Institute M-Grid Supercomputing Initiative	Provide small- and medium-sized companies with funding and training to access specialized high-capacity computing and storage network (M-Grid)	\$500,000	WEDC, private, local, State, and Federal stakeholders	Underway
6	M7 Region	Multiple	Minority Business Development Revolving Loan Fund (RLF)	RLFs and technical assistance for minority business creation and expansion via Chambers and nonprofit minority business associations	\$550,000 (FY14)	WEDC, private, local, State, and Federal stakeholders	Underway
6, 8	M7 Region	Multiple	Wi Manufacturing Extension Partnership (WMEP) Profitable Sustainability Initiative	Support small and midsize manufacturers in achieving profitable sustainability	TBD	WEDC, private, local, State, and Federal stakeholders	Underway
7	M7 Region	City of Milwaukee	Regional Entertainment District	Redevelopment and expansion of regional conference and entertainment district	TBD	TBD	TBD
1, 6, 9	M7 Region	City of Wauwatosa	UW-Milwaukee (UWM) Innovation Campus/Innovation Accelerator	Attraction of biomedical and energy related businesses to UWM Innovation Campus and research-intensive technology companies that would benefit from collaboration with UWM or the institutions located at the nearby Regional Medical Center	TBD ^c	EDA, UWM, City of Wauwatosa, other private, local, State, and Federal stakeholders	2010 (on-going)
6	M7 Region	Multiple	Creative Alliance	Highlighting and investing in creative hubs within major population centers	TBD	TBD; private, local, State, and Federal stakeholders	Underway
2, 3, 9	M7 Region	Multiple	Intensive Aquaculture	Industry development of urban aquaculture and aquaponics utilizing redevelopment opportunities in population centers	TBD	TBD; private, local, State, and Federal stakeholders	TBD
2, 6, 9	M7 Region	City of Milwaukee	Water Council BREW Accelerator	A six-month program sponsored by the Water Council and UW-Whitewater's Institute for Water Business to help water technology entrepreneurs get products and services to market	\$400,000 annually	WEDC and private	Ongoing

Table VIII-1 (continued)

Strategy Number ^a	County/ Counties	Local Government ^b	Project Title	Project Description	Preliminary Estimated Cost	Proposed Funding Sources	Estimated Start Date
3, 6, 9	M7 Region	TBD	Food and Beverage (FaB) Accelerator (FaBcelerator)	An 18-month food and beverage accelerator program to screen, fund, and mentor startups or growing enterprises with high-growth product or food science and technology propositions	\$1,150,000 (during 5-year start-up)	WEDC, UW-Extension, UWM, FaB Wisconsin, WMEP, Metropolitan Milwaukee Association of Commerce	2015
1, 6, 7, 8, 9	Milwaukee	City of Milwaukee	Century City I and II/30 th Street Corridor Infrastructure and Development/ Transform Milwaukee	Develop contemporary business park at the site of the former AO Smith/Tower Automotive plant through demolition of obsolete manufacturing buildings, improving road, rail, and telecommunications infrastructure, and develop new greenway to separate site from nearby residential neighborhoods. Construct Advanced Manufacturing Training Center and renovate an existing building to serve as an Energy Innovation Center (see next two rows)	\$12,500,000 to \$55,000,000	City of Milwaukee, New Markets Tax Credits, Milwaukee Economic Development Corp., WHEDA, WEDC, State of Wisconsin ^d , EPA, HUD, EDA, Milwaukee Metropolitan Sewerage District (MMSD), EB-5 investment	2011 (Ongoing)
5	M7 Region	City of Milwaukee	Century City Advanced Manufacturing Training Center	Provide advanced manufacturing training and facilities for prototype and small-run production to support growth and attraction of key manufacturing segments in Southeast Wisconsin	\$7,800,000	TBD; private, local, State and Federal stakeholders	2014
1, 6, 9	M7 Region	City of Milwaukee	M-WERC Energy Innovation Center	Renovate former Eaton Research Center (now Century City Tower) to serve as Energy Innovation Center to provide laboratories for research and development in energy, power, and control technologies	\$9,357,000	WEDC, WHEDA, EDA, private	TBD
2, 7	M7 Region	City of Milwaukee	Reed Street Yards Business Park	Redevelop 17-acre property as research and technology park focused on water technology industry. Property is adjacent to Global Water Center, and can accommodate 1 million sq. ft. of new office, research, and light industrial space	\$15 million	City of Milwaukee, MMSD, EDA, EPA	2013 (Ongoing)
7, 8, 9	M7 Region	Multiple	Regional Transportation Authority	Link with Tri-State Alliance for regional growth in transportation infrastructure improvements such as passenger rail	TBD	TBD; private, local, State, and Federal stakeholders	TBD
8	M7 Region	Multiple	Reconstruction of Zoo Interchange	Reconstruct existing interchange and adjacent streets and highways/freeways	\$1.7 billion	US DOT, WisDOT	Underway
8	M7 Region	Multiple	I-94 North-South Freeway reconstruction	Reconstruct I-94 between the Illinois State line and College Avenue in Milwaukee County	\$525,300,000 (remaining after 2014)	US DOT and WisDOT	Underway, completion in 2021

Table VIII-1 (continued)

Strategy Number ^a	County/Countries	Local Government ^b	Project Title	Project Description	Preliminary Estimated Cost	Proposed Funding Sources	Estimated Start Date
8	M7 Region	Cities of Franklin and Oak Creek	Construction of an interchange at I-94 and Elm Road to replace existing I-94/27 th Street interchange	Relocate existing interchange	\$34,700,000	US DOT, WisDOT	2020
8	M7 Region	Multiple	I-43 North Freeway reconstruction and construction of new interchange at Highland Road	Reconstruct I-43 between Silver Spring Drive in Milwaukee County and STH 60 in Ozaukee County and add a new interchange at Highland Road	\$463,800,000	US DOT and WisDOT, also Ozaukee County and City of Mequon for Highland Road Interchange	2020
8	M7 Region	Multiple	US Highway 12 freeway extension from Elkhorn (STH 67) to Whitewater (STH 59)	Extend the current freeway portion of US Highway (USH) 12	\$417,300,000	US DOT, WisDOT, and Walworth County	2025
8	M7 Region	Multiple	Construction of new interchange at I-43 and CTH F	Construction of new interchange at I-43 and CTH F in Walworth County	\$7,000,000	TBD	TBD
7, 8, 9	Kenosha	City of Kenosha	Redevelopment of former Chrysler Engine Plant	Remediation and redevelopment of former Chrysler site (113 acres)	\$30,000,000	Brownfield remediation grant, other TBD	Underway
5, 9	Milwaukee	Multiple	Youth Workforce Development	Expand internships, job shadowing opportunities, part-time summer jobs, and career academies for high school and college students, such as the existing "Earn and Learn" and "YouthBuild" programs	TBD	Milwaukee County, Milwaukee Area Workforce Investment Board, School Boards, and private, local state, and federal agencies	Underway
5, 9	Milwaukee	Multiple	At-Risk Youth Workforce Development	Develop employment training, job placement, and driver's licensing programs that focus on the large population of black males approaching adulthood in Milwaukee County	TBD	Milwaukee County, Milwaukee Area Workforce Investment Board, School Boards, and private, local, state, and federal agencies	TBD
7, 8	Milwaukee	City of Milwaukee	Lakefront Gateway	Reconfigure I-794 Lake Interchange to reduce the footprint of the freeway, create developable sites, and create a gateway to Milwaukee's lakefront and downtown. The project includes new streets, streetscaping, pedestrian and bike amenities, and development of public plazas	\$45,000,000	US DOT, WisDOT, City of Milwaukee, CMAQ, Wisconsin Coastal Management Program, private funds	2014
7, 8, 9	Milwaukee	City of Milwaukee	MKE Regional Business Park	Convert former 440 th Air Base (adjacent to Mitchell Airport) into Business Park	TBD	TBD	2014/2015

Table VIII-1 (continued)

Strategy Number ^a	County/ Counties	Local Government ^b	Project Title	Project Description	Preliminary Estimated Cost	Proposed Funding Sources	Estimated Start Date
8, 9	Milwaukee	Village of West Milwaukee	Milwaukee Boiler Site Project	5-acre redevelopment located at 41 st Street between National Ave and Greenfield Ave.; currently two buildings on four parcels with one owner	More than \$4 million	TBD	2014/15
8, 9	Milwaukee	Village of West Milwaukee	Burnham Street Project	13.75-acre redevelopment of former salvage yards for commercial development	TBD	TBD	2016
8, 9	Milwaukee	Multiple	Multi-Modal Transportation Center/Aerotropolis	Improve links between port, airport, rail, and trucking transportation modes	TBD	TBD	TBD
7, 9	Ozaukee	Village of Thiensville	Main Street Redevelopment	Improvement and reconstruction of the Main Street Corridor in Thiensville, including landscaping and public features	\$800,000	Village of Thiensville, WisDOT STP Grant	2015
7	Racine	City of Racine	Implementation of the Root Works Revitalization/ Machinery Row	Spur investment and revitalization of a former industrial center in the heart of Racine into a vibrant mixed-use development that includes residential, commercial, and public uses. A key component is redevelopment of former industrial buildings at Machinery Row	\$65 million	HUD, WEDC (tax credits), TIF, private, other TBD	Spring 2015
2, 3, 9	Racine	City of Racine	Aquaculture Center	The Aquaculture Center will involve the cultivating of freshwater fish populations under controlled conditions in a 100,000 sq. ft. facility. The anticipated process will result in one million pounds of production annually	TBD	TBD	Fall 2015
3, 7	Racine	City of Racine	Implementation of the Uptown Revitalization Strategy	Spur investment and revitalization of key residential and commercial gateway into City of Racine with emphasis on encouraging small business development in the food and beverage industries	TBD	TBD	Summer 2015
5, 9	Racine	Multiple	Youth Workforce Development	Expand internships, job shadowing opportunities, part-time summer jobs, and career academies for high school and college students, such as the existing "Opportunity Internships" and Racine Unified School District's "academy" programs	TBD	Racine County, Southeast WI Workforce Development Board, School Boards, and private, local state, and federal agencies	Underway
7	Walworth	City of Delavan	Downtown Redevelopment	Rehab commercial buildings, focusing initially on vacant, foreclosed properties	\$5,695,000	TIF and grants	Underway
9	Walworth	City of Elkhorn	East Market Street Extension/Open Space Improvements	Cooperative city/school district project to extend street and develop park to provide needed recreational facilities	\$3,500,000	City funds and/or DNR grants	TBD

Table VIII-1 (continued)

Strategy Number ^a	County/Countries	Local Government ^b	Project Title	Project Description	Preliminary Estimated Cost	Proposed Funding Sources	Estimated Start Date
6, 9	Walworth	City of Whitewater	Whitewater University Technology Park Business Accelerator	The accelerator would serve to support growing demand for incubation services/space and serve as an accelerator for enterprises requiring more space and/or light manufacturing space in the Whitewater University Technology Park	\$3,300,000	Private developer with a 50% lease guarantee by City of Whitewater	2015
8, 9	Washington	Multiple	Countywide Site Revitalization Program	Washington County, the Cities of Hartford and West Bend and the Villages of Jackson, Richfield, and Slinger formed a formal coalition to revitalize prioritized brownfield and underutilized redevelopment sites. Project activities include assessment, remediation, site and facility enhancement, and other redevelopment	\$1,600,000	Washington County, local government TIFs, EPA, WDNR, WEDC	2015
7, 8, 9	Washington	City of Hartford	WB Place Redevelopment	Assess, remediate, and redevelop a 3.8 acre parcel that has been in use as a tannery since the 1840's	TBD	TIF, Washington County, WDNR, WEDC	2015
7, 8, 9	Washington	City of West Bend	Bermico Manufacturing Redevelopment	Dating back to the 1920's, the former manufacturing site requires assessment, likely remediation and site and facility rehabilitation	TBD	TIF, Washington County, WDNR, WEDC	TBD
8, 9	Washington	City of West Bend	West Bend Corporate Center	Southeast Wisconsin's only WEDC Certified Site; 71 acres	TBD	TIF, City, Washington County, private	Underway
7, 8, 9	Washington	City of West Bend	Gehl Manufacturing Site	Site requires brownfield remediation and site and facility rehabilitation	\$20,000,000	TIF, City, Washington County, WEDC, private	Underway
7, 8, 9	Washington	Village of Jackson	Center Street Redevelopment Area	Rehabilitation of 10 parcels within the historic center of Jackson require assessment, potential remediation and site and facility upgrades to revitalize the downtown	TBD	TIF, Washington County, WDNR, WEDC	TBD
7, 8, 9	Washington	Village of Kewaskum	Regal Ware Redevelopment	Redevelop the former Regal Ware manufacturing plant and related out lots located in the core of the community and neighboring local elementary and high schools, library, and government center	TBD	Washington County, WEDC, WDNR, Village of Kewaskum	TBD
7, 8, 9	Washington	Village of Slinger	Niphos Coating Facility	Subject to an emergency removal action by the EPA to address more than 8,800 gallons of abandoned chemicals, this site requires assessment, remediation, and redevelopment	TBD	TIF, Washington County, WDNR, WEDC	2015

Table VIII-1 (continued)

Strategy Number ^a	County/ Counties	Local Government ^b	Project Title	Project Description	Preliminary Estimated Cost	Proposed Funding Sources	Estimated Start Date
7, 8, 9	Washington	Village of Slinger	Historic Downtown Revitalization	Promote mixed use business development and second story residential. Develop marketing strategy and conduct parking study. Develop and implement streetscape plan. Seed a RLF fund for downtown	\$1,200,000	TIF, Washington County, WDNR, WEDC	TBD
7, 9	Waukesha	City of New Berlin	City Center	Promote further commercial and residential development (about 35 acres available)	TBD	TBD	On-going
7, 9	Waukesha	City of Waukesha	Downtown Improvements	Street reconstruction, including new signage and lighting, to implement Central City Master Plan	TBD	TIF, City	Underway
1, 5, 9	Waukesha	Waukesha County	Waukesha County Technical College (WCTC) Integrated Manufacturing Center (IMC)	Construct 24,000 square foot IMC to serve as the hub of manufacturing programs on campus and allow increase in student capacity and growth in program areas	\$4,500,000	WCTC and private donors	TBD

^aSee last page for summary list of CEDS Economic Development strategies.

^bLocal government(s) in which the project would be located, if applicable.

^cProject received a \$5,400,000 grant from EDA in 2011 for construction of the Innovation Accelerator, with \$2,700,000 in additional funding from UWM.

^dThe Transform Milwaukee project has received funding from the Wisconsin Department of Children and Families, Department of Natural Resources, and Department of Workforce Development, in addition to funding from the agencies listed.

Source: Southeastern Wisconsin Regional Economic Partnership (REP) and the Wisconsin Economic Development Corporation. The REP includes representatives from each of the seven county economic development organizations, the City of Milwaukee, We Energies, Milwaukee 7, and SEWRPC.

Table VIII-2

PROPOSED SOUTHEASTERN WISCONSIN ECONOMIC DEVELOPMENT PROJECTS: TIER II

Strategy Number ^a	County/ Counties	Local Government ^b	Project Title	Project Description	Preliminary Estimated Cost	Proposed Funding Source	Estimated Start Date
8, 9	Kenosha	City of Kenosha	Business Park Development (Bridge Development Partners)	Development of new 350-acre business park on the west side of I-94 and north and south of State Trunk Highway (STH) 142	TBD	TBD	TBD
8, 9	Kenosha	City of Kenosha	Business Park Development (NAI MLG)	Development of new 148-acre business park west of I-94 and south of County Trunk Highway (CTH) K	TBD	TBD	TBD
8, 9	Kenosha	City of Kenosha	Kenosha Industrial Park expansion	Development of new 130-acre business park on north side of the existing Kenosha Industrial Park	TBD	TBD	TBD
8, 9	Kenosha	Village of Bristol	Bristol Business Park expansion	100-acre expansion on the south side of the existing Bristol Industrial Park	TBD	TBD	TBD
8, 9	Kenosha	Village of Bristol	Bristol Business Park	Development of new 167-acre business park on west side of CTH U and south of CTH C	TBD	TBD	TBD
8, 9	Kenosha	Village of Bristol	Business Park Development (Janko)	Development of new 150-acre business park on the west side of CTH U and north of CTH Q	TBD	TBD	TBD
8, 9	Kenosha	Village of Paddock Lake	Countryside Commerce Center	Development of new 64-acre business park on west side of STH 83, south of STH 50	TBD	TBD	TBD
8, 9	Kenosha	Villages of Bristol and Pleasant Prairie	Abbott Labs	Development of 460-acre site by Abbott Labs	TBD	TIF; other funding TBD	TBD
8, 9	Kenosha	Village of Pleasant Prairie	Riverview Corporate Park	Development of new 254-acre office/manufacturing park	TBD	TIF; other funding TBD	TBD
8, 9	Kenosha	Village of Pleasant Prairie	Prairie Springs Pointe	Development of a 19-acre mixed-use (office/service/retail) center	TBD	TIF; other funding TBD	TBD
8, 9	Kenosha	Village of Pleasant Prairie	Prairie Springs Pointe North	Development of new 12-acre office/manufacturing park	TBD	TIF; other funding TBD	TBD
8, 9	Kenosha	Village of Pleasant Prairie	Jockey International site	Development of new 70-acre office park	TBD	TIF; other funding TBD	TBD
8, 9	Kenosha	Village of Pleasant Prairie	Lakeview Corporate Park expansion (Majestic Realty)	91-acre expansion of existing office/manufacturing park	TBD	TBD	TBD
8, 9	Kenosha	Village of Pleasant Prairie	Business development (Pitts Brothers)	Business development of 62-acre parcel adjacent to Lakeview Corporate Park	TBD	TBD	TBD
8, 9	Kenosha	Village of Pleasant Prairie	Business development (Raybin and Lynn)	Business development of 34-acre parcel near Lakeview Corporate Park (adjacent to Pitts Brothers site)	TBD	TBD	TBD
8, 9	Kenosha	Village of Twin Lakes	Twin Lakes Business Park	Development of new 110-acre business park on west side of Village north and east of intersection of CTH O and CTH P	TBD	TBD	TBD
8, 9	Kenosha	Town of Salem	Business Park Development (Highway C)	Development of new 80-acre business park north of CTH C and west of STH 83	TBD	TBD	TBD

Table VIII-2 (continued)

Strategy Number ^a	County/ Counties	Local Government ^b	Project Title	Project Description	Preliminary Estimated Cost	Proposed Funding Source	Estimated Start Date
8	Kenosha	Town of Somers	Business Park Development (Cushman and Wakefield)	Development of new 159-acre business park on west side of STH 31, and north and south of CTH L	TBD	TBD	TBD
8	Kenosha	Town of Somers	Business Park Development (EMF Acres)	Development of new 132-acre business park on east side of I-94, north of CTH S	TBD	TBD	TBD
8	Kenosha	Town of Somers	Business Park Development (Majestic Realty)	Development of new 300-acre business park on north side of CTH S and west side of CTH H	TBD	TBD	TBD
8	Kenosha	Town of Somers	Business Park Development (Thomas Fliess)	Development of new 220-acre business park on west side of STH 31, south of CTH L	TBD	TBD	TBD
7, 8, 9	Milwaukee	City of Greenfield	Loomis Crossing	20-acre redevelopment at I-894 and Loomis Road interchange to include commercial, residential, and mixed use	TBD	TBD	TBD
7, 8, 9	Milwaukee	City of Greenfield	Chapman School	10-acre redevelopment at I-894 and Layton Avenue interchange for new mixed use development	TBD	TBD	TBD
8, 9	Milwaukee	City of Greenfield	Mt. Carmel	25-acre redevelopment at I-894 and S. 60 th St. interchange for new commercial development	TBD	TBD	TBD
8, 9	Milwaukee	Village of West Milwaukee	Miller Park Way and Lincoln Ave	5.5-acre redevelopment for commercial/office	TBD	TBD	2014/2015
8, 9	Ozaukee	City of Cedarburg	Amcast Site Facility	EPA Superfund clean-up site, building demolition and site assessment and remediation	TBD	EPA, WEDC, City of Cedarburg	2016
8, 9	Ozaukee	City of Mequon	Revitalization of Town Center	Acquisition of blighted industrial buildings, which will secure access to a main corridor. Removal of easements, gas tanks, and infrastructure construction necessary for redevelopment	\$3,000,000	City of Mequon, TIF, WDNR	2015/2016
8, 9	Ozaukee	City of Mequon	East Trunk Sewer	Extending sewer capacity along a key business corridor	\$8,000,000 to \$10,000,000	City of Mequon, Developer Fees	2015
8, 9	Ozaukee	City of Mequon	Combined DPW Facility	Develop a combined DPW facility to consolidate divisions and provide two private development opportunities	\$4,500,000	City of Mequon, MMSD	2015/2016
8, 9	Ozaukee	City of Port Washington	Industrial Park Development	Acquisition of land and construction of streets, water and sewer utilities to the lands acquired	\$1,850,000	TIF, Developer Fees	2015/2016
8, 9	Ozaukee	City and Town of Port Washington	Joint Town/City Business Park	Extension of sewer and water utilities to serve a business park described in the town/city boundary agreement	\$1,350,000	TIF, Developer Fees	2016/2017
8, 9	Ozaukee	Village of Fredonia	Fredonia Industrial Park Expansion	Purchase land for expansion of Industrial Park, expansion of sewer and water infrastructure to new parcels	\$3,100,000	Village of Fredonia, TIF	2018
8, 9	Ozaukee	Village of Grafton	Grafton Business Park	Construction of streets, extension of electrical, water, and sanitary sewer utilities to lands purchased for a new business park	\$2,000,000	TIF and local financing	2017
8, 9	Ozaukee	Town of Grafton	Business Park Infrastructure	Extension of water and sewer to key development business sites	TBD	Developer Fees	2020

Table VIII-2 (continued)

Strategy Number ^a	County/ Counties	Local Government ^b	Project Title	Project Description	Preliminary Estimated Cost	Proposed Funding Source	Estimated Start Date
8, 9	Ozaukee	Town of Grafton	Falls Road Reconstruction	Reconstruction of a main thoroughfare throughout Grafton linking the businesses areas on the east and west sides of Grafton	\$600,000	Town of Grafton, WisDOT	2016/2017
8, 9	Racine	City of Burlington	Expansion of the Burlington Manufacturing and Office Park	Expansion of the Burlington Manufacturing and Office Park, including additional industrial lots, roads, and utility infrastructure. The expansion will allow Burlington to continue to attract mid-sized advanced manufacturing and production facilities that employ area residents and contribute to the region's economic growth	\$6,000,000	TBD	May 2016
8, 9	Racine	Village of Caledonia	Creation of TID #4 and Expansion of Sewer and Water at CTH K and I-94	Create new tax incremental financing district for the extension of sanitary sewer and water to serve potential new industrial and business development	Phase I: \$18,000,000	TIF	2015
8, 9	Racine	Village of Caledonia	Caledonia Business Park Road Improvements	Upgrade road leading to Caledonia Business Park to improve accessibility and truck flow	\$1,920,000	TIF, TEA Grant	2015
8, 9	Racine	Village of Mount Pleasant	Mount Pleasant Business Park, Infrastructure Investment	Extend infrastructure improvements to 413 acres identified for business park development at I-94 and STH 20	\$23,000,000	TBD	2014
8, 9	Racine	Village of Mount Pleasant	Utility Service Area Study and Extension of Utility Services to Durand Avenue/STH 11	Completion of Utility Service Area Study for area along STH 11 (Durand Avenue) leading to the extension of sanitary sewer to STH 11 to support industrial and business park development	\$250,000 for study; \$3,000,000 for sewer line extension	TBD	2015
8, 9	Racine	Village of Sturtevant	Willow Road Reconstruction & Extension	Reconstruction of Willow Road north of STH 11 and construction of extension to connect with portion of Willow Road south of STH 11. The project will open up additional land for business development in the STH 11 corridor	\$4,032,200	TBD	Summer 2016
8, 9	Racine	Village of Waterford	Creation of New Industrial Park in Village	Identify and establish location for new industrial/business park to support existing business growth and new industrial tenants	\$50,000 Needs Assessment; Infrastructure Extension TBD	TBD	September 2014
7, 8	Racine and Walworth Counties	City of Burlington	Burlington Regional Health Complex	Extend utility infrastructure to new regional healthcare site with opportunities for future expansion of the medical facility market. The site is projected to be a medical healthcare complex for the Western Racine County and Eastern Walworth County market	\$3,000,000	Private, TIF District	June 2014
8, 9	Walworth	City of Delavan	Business Park Expansion	Acquire adjacent land and extend streets, water, and sewer utilities to serve the eastern portion of the existing park and an expansion area	\$1,350,000	TIF and Developer Fees	2018
8	Walworth	City of Elkhorn	NE Water Treatment Plan/Elevated Storage	Upgrade City water system to ensure water distribution capacity	\$9,000,000	Safe Drinking Water Loan Program	TBD

Table VIII-2 (continued)

Strategy Number ^a	County/ Counties	Local Government ^b	Project Title	Project Description	Preliminary Estimated Cost	Proposed Funding Source	Estimated Start Date
8, 9	Walworth	City of Elkhorn	Babe Mann Park/White River Trail head	Redevelop existing park and provide trail-head facilities for the County White River Trail	TBD	City funds and/or DNR grants	TBD
8, 9	Walworth	City of Lake Geneva	Lake Geneva Business Commons Development	Install infrastructure along STH 120 to serve new 120-acre business and industrial park	\$4,500,000	New TIF for park	2016
8	Walworth	Village of East Troy	East Troy Business Park Phase II	Install infrastructure, roadways, and complete grading of 80-acre site that serves as phase 2 of the East Troy Business & Industrial Park	\$3,000,000	Current TIF for park	2016
6, 9	Washington	Multiple	Countywide Economic Gardening Program	The Washington County Economic Development Corporation (EDWC) has successfully piloted an economic gardening program designed to support high growth, Stage 2 companies in the County. This project would provide seed funding to fully implement the program for over 50 companies	\$250,000	EDWC, user fees, WEDC, UW Extension	2015
6, 9	Washington	Multiple	Impact Revolving Loan Fund (RLF) Program	Washington County has seeded a revolving loan fund program with \$2M to fuel quality job creation, new economic investment and prosperity countywide. The fund targets high growth companies and projects involving significant job creation. The program is administered by EDWC	\$8,000,000	Washington County	2012
8, 9	Washington	City of West Bend	Wingate Creek Business Park	Development of business park and bridge over the Milwaukee River- 155 acres	TBD	TIF, City, private, others TBD	Underway
8, 9	Washington	Village of Germantown	West Business Park	Develop a new "West Business Park" near USH 41 and Lannon Road. Build-out requires land acquisition, infrastructure, and developer incentive program	\$10,000,000	TIF, Washington County, WEDC	2016
8, 9	Washington	Village of Kewaskum	Business Park Development	Village has built infrastructure for a park that is privately held but languishing. Project would allow the Village to gain control of the land and offer a package of incentives to spur private investment	\$1,900,000	TIF, Washington County, WEDC	2014
8, 9	Washington	Village of Richfield	Historic STH 175 Redevelopment Area	Rehabilitation of 12 parcels bordering STH 175 and the Wisconsin and Southern Railroad right-of-way (ROW)	TBD	TIF, Washington County, WDNR, WEDC	TBD
8, 9	Washington	Village of Slinger	Business Park Development	Develop business parks along three core nodes: south of STH 60; along Weil Drive; and in the area of MBW Road, Hilldale Drive, and Hartford Roads	\$15,000,000	TIF, Washington County, WEDC	TBD
7, 8, 9	Waukesha	City of Brookfield	Ruby Farms Development	Mixed use (office/retail/service/residential) of 66-acre infill site	TBD	TBD	Initial steps underway
8, 9	Waukesha	City of Muskego	Business Park Development	Develop business park along Moorland Road from College Ave to Janesville Road	\$10,000,000	TIF and Other	TBD

Table VIII-2 (continued)

Strategy Number ^a	County/ Counties	Local Government ^b	Project Title	Project Description	Preliminary Estimated Cost	Proposed Funding Source	Estimated Start Date
7, 8, 9	Waukesha	City of Muskego	Parkland Mall	Existing 10-acre vacant lot in the downtown of Muskego to be redeveloped as mixed use catalyst for other downtown redevelopment	TBD	TIF and Other	TBD
7, 8, 9	Waukesha	City of Muskego	Pioneer Drive	Historic Pioneer Drive area has been designated a redevelopment district for implementation of new redevelopment opportunities including grants/loans for new commercial investments	TBD	TIF and Other	TBD
8, 9	Waukesha	City of Muskego	Landfill Business Park	Develop business park along STH 36 in southeast corner of Muskego next to landfill	\$5,000,000	TIF and Other	TBD
7, 8, 9	Waukesha	City of New Berlin	Westridge Business Park Expansion	Develop a 187-acre mixed-use business park expansion east of Moorland Road, south of Grange Avenue, north of College Avenue and west of Sunny Slope Road	TBD	TIF, Waukesha County, WEDC	TBD
8, 9	Waukesha	City of New Berlin	Gateway to New Berlin - Greenfield Avenue	Promote a 22-acre commercial development on the southeast corner of Greenfield Avenue and Moorland Road	TBD	TBD	TBD
7, 8, 9	Waukesha	City of New Berlin	Mill Valley Eco-Business Park	Redevelop an existing sand and gravel mining operation (220 acres) with a mix of light manufacturing, office, and small-scale retail	TBD	TIF, Waukesha County, WEDC	TBD
7, 8, 9	Waukesha	City of New Berlin	Lincoln Avenue Business Park Expansion (Geipel)	Redevelop an existing sand and gravel mining operation (176 acres) into a business park	TBD	TBD	TBD
8, 9	Waukesha	City of New Berlin	Coffee Road	Reconstruction of 1.3 miles of an arterial street near the New Berlin Industrial Park, including improved storm water management components	\$3.5 million	80% Federal 20% City General Funds	2014
8, 9	Waukesha	City of New Berlin	Lincoln Avenue	Reconstruction of one mile of Industrial Park road including widening the road and improving storm water management capabilities	\$5.2 million	50% Federal 50% City General Funds	2014
7, 8, 9	Waukesha	Town of Brookfield	The Corners of Brookfield	Mixed-use redevelopment (retail/service/residential) of a 19-acre former Menards and adjacent shopping center in the northeast quadrant of Goerke's Corners	TBD	TIF, Town, private	Underway

^aSee last page for summary list of CEDS Economic Development strategies.

^bLocal government(s) in which the project would be located, if applicable.

Source: Southeastern Wisconsin Regional Economic Partnership (REP), Wisconsin Economic Development Corporation, and Cities of Muskego and New Berlin. The REP includes representatives from each of the seven county economic development organizations, the City of Milwaukee, We Energies, Milwaukee 7, and SEWRPC.

ECONOMIC DEVELOPMENT STRATEGIES IN THE SOUTHEASTERN WISCONSIN REGION

Note: Each project on the preceding tables is linked to one or more of the following strategies. The strategy number is listed in the first column of the tables. See Chapter VI for additional information about the development of the strategies and proposed implementation activities.

1. Become a leading innovator, producer, and exporter of products and services related to **energy, power, and controls**.
2. Become a global hub for innovation and start-up activity in the **water technology** industry.
3. Leverage the region's geographic, supply chain and human capital advantages to grow the **food and beverage** cluster.
4. Enhance the **export capacity and capability** of the region's firms, focusing on small- and medium-sized enterprises.
5. Align **workforce development** with growth opportunities in targeted, high-potential industry clusters.
6. Foster a dynamic, richly networked **innovation and entrepreneurship ecosystem**.
7. Catalyze "**economic place-making**" in the region's core cities and strategic locations throughout the region.
8. Modernize **regional infrastructure** to enhance efficiency, cost-effectiveness, and connectivity.
9. Enhance **inter-jurisdictional cooperation and collaboration** for economic growth.

CEDs Tier I and Tier II Projects (00222173-2).DOC
KRY/NMA/jcp/kmd
8/12/15; 6/19/15; 1/8/15; 12/1/14; 9/29/14; 8/10/15

Appendix A

COMMITTEE ROSTERS

Milwaukee 7 Regional Economic Development Council

and

Southeast Wisconsin Regional Economic Partnership

MILWAUKEE 7

REGIONAL ECONOMIC DEVELOPMENT ADVISORY COUNCIL: AUGUST 2015

Co-Chairs

Gale Kappa
Chairman & CEO
Wisconsin Energy Corporation

Ted Kellner
Executive Chairman
Fiduciary Management, Inc.

Tom Barrett
Mayor
City of Milwaukee

At-Large Members

Scott Beightol
Chairman/Partner
Michael Best & Friedrich

Aldo Madrigano
CEO
Beer Capitol Distributing Co.

Linda Benfield
Managing Partner
Foley & Lardner

Barry Mandel
President
Mandel Group

Richard Bliss
President
Godfrey & Kahn, S.C.

John McDermott
Senior VP, Global Sales & Marketing
Rockwell Automation

Tom Burke
President/CEO
Modine Manufacturing Co.

Rich Meeusen
Chairman/President/CEO
Badger Meter

Brad Chapin
Executive Vice President
BMO Harris Bank

Alex Molinaroli
CEO
Johnson Controls

John Daniels, Jr.
Chairman Emeritus
Quarles & Brady LLP

Mark Mone
Chancellor
UW-Milwaukee

Pat Foy
Executive Vice President
FIS Global

Cory Nettles
Partner
Quarles & Brady LLP

Chris Goller
Regional President
PNC Bank

Phillip Neuenfeldt
Secretary/Treasurer
Wisconsin State AFL-CIO

Michael Grebe
President/CEO
Lynde & Harry Bradley Foundation

Reed Hall
CEO
Wisconsin Economic Development Corp.

Gail Hanson
CFO
Aurora Health Care

Jim Hawkins
Executive Vice President
Kenall

Mark Immekus
Executive Vice President
OPS Employment Group

Mary Isbister
President
GenMet

Cathy Jacobson
President/CEO
Froedtert Health

Tom Jacobson
WHEP Board Chair
Bruno Independent Living Aids

John Koetz
President Surface Mining
Joy Global

Matthew Levatich
President/CEO
Harley-Davidson

Mike Lovell
President
Marquette University

James Popp
President
Chase

Jonas Prising
CEO
Manpower Group

Ajita Rajendra
Chairman/CEO
A.O. Smith Corp.

Jeff Scheidt
Executive Vice President
Consolidated Construction Company

John Raymond
President
Medical College of Wisconsin

John Schlifske
Chairman/CEO
Northwestern Mutual

Steven J. Smith
Chairman/CEO
Journal Communications

Mary Ellen Stanek
Managing Director
Robert W. Baird

Todd Teske
Chairman
Briggs & Stratton Corp.

Peggy Troy
President/CEO
Children's Hospital of Wisconsin

Scott VanderSanden
President-Wisconsin
AT&T

Kenosha County Representatives

Jim Kreuser
County Executive
Kenosha County

Deborah Ford
Chancellor
University of Wisconsin-Parkside

Todd Battle
President
Kenosha Area Business Alliance

Milwaukee County Representatives

Chris Abele
County Executive
Milwaukee County

James Tarentino
Economic Development Director
Milwaukee County

Theodore Lipscomb, Sr.
Chairman
Milwaukee County Board

Michael Murphy
Common Council President
City of Milwaukee

Ozaukee County Representatives

Jennifer Rothstein
Supervisor
Ozaukee County Board

Kathleen Cady Schilling
Executive Director
Ozaukee Economic Development

Thomas Meaux
County Administrator
Ozaukee County

Carol Schneider
CEO
SEEK, Inc.

Racine County Representatives

Jonathon Delagrave
County Executive
Racine County

Mark Eckhardt
Senior Vice President & CFO
S.C. Johnson

Jenny Trick
Executive Director
Racine County Economic Development Corp.

Walworth County Representatives

Nancy Russell
Chair
Walworth County Board

Richard Telfer
Chancellor
University of Wisconsin-Whitewater

Dave Bretl
County Administrator
Walworth County

Derek D'Auria
Executive Director
Walworth County Economic Development Alliance

Washington County Representatives

Herbert J. Tennies

Chair
Washington County Board

John Torinus

Chairman
Serigraph

Christian Tscheschlok

Executive Director
Economic Development Washington County

Waukesha County Representatives

Paul Farrow

County Executive
Waukesha County

Suzanne Kelley

President
Waukesha County Business Alliance

Dale Shaver

Director, Department of Parks and Land Use
Waukesha County

Joel Quadracci

President/CEO
Quad/Graphics

**SOUTHEAST WISCONSIN REGIONAL
ECONOMIC PARTNERSHIP: AUGUST 2015**

County Economic Development Organization Members:

Todd Battle, President	Kenosha Area Business Alliance
Derek D’Auria, Executive Director	Walworth County Economic Development Alliance
Kathleen Cady Schilling, Executive Director	Ozaukee Economic Development
Dale Shaver, Director	Waukesha County Department of Parks and Land Use
James Tarantino, Economic Development Director	Milwaukee County Department of Administrative Services
Jenny Trick, Executive Director	Racine County Economic Development Corporation
Christian Tscheschlok, Executive Director	Economic Development Washington County

Other Members:

Nancy Anderson, Chief Planner	Southeastern Wisconsin Regional Planning Commission
Martha Brown, Deputy Commissioner	Milwaukee Department of City Development
Joel Burow, Project Manager	We Energies
Pat O’Brien, President	Milwaukee 7

**COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY
FOR SOUTHEASTERN WISCONSIN: 2015 - 2020**

Appendix B

SUMMARY OF REVIEW COMMENTS AND RESPONSES

INTRODUCTION

A Comprehensive Economic Development Strategy (CEDS) is designed to bring together the public and private sectors to develop a strategic plan to diversify and strengthen the region's economy. The CEDS for the Southeastern Wisconsin Region was developed jointly by the Milwaukee 7 (M7) Economic Development Partnership and the Southeastern Wisconsin Regional Planning Commission (SEWRPC), with assistance from the Regional Economic Partnership (REP)¹ and the Wisconsin Economic Development Corporation.

The CEDS was developed with the participation of the public and private (government and business) sectors. The CEDS draws heavily from the "Framework for Economic Growth" prepared in 2012 and 2013 by the M7. The M7 plan was supplemented where necessary to meet the requirements for development of a CEDS set forth in Federal regulations and to address the comments made on the draft CEDS.

In addition to setting forth a strategy for economic growth in the Region, the CEDS is intended to meet the requirements of the U.S. Department of Commerce - Economic Development Administration (EDA) for such work, thereby buttressing efforts to secure Federal funding for projects in the seven-county Region that have a particular focus and impact on economic development, particularly projects that will benefit economically distressed areas. The CEDS is also intended to provide a basis whereby the EDA can consider creation of an Economic Development District in southeastern Wisconsin.

A public comment period on the CEDS took place from March 2 through May 1, 2015. This appendix summarizes major comments on the draft CEDS and changes made to address the comments. A Record of Public Comments and Responses on the Draft CEDS, which describes the comments and responses in greater detail, may be requested by contacting SEWRPC at (262) 547-6721 or ceds@sewrpc.org.

Presentations on the draft CEDS were made at the following meetings in early 2015:

- February 10: SEWRPC Planning and Research Committee
- March 12: Waukesha County Business Alliance Economic Development Committee
- April 2: Washington County Economic Development Corporation Board
- April 7: SEWRPC Environmental Justice Task Force
- April 13: Milwaukee County Economic and Community Development Committee
- April 14: Racine County Economic Development Corporation Board

¹ *The Southeast Wisconsin Regional Economic Partnership includes a representative from each county, the City of Milwaukee, We Energies, M7, and SEWRPC.*

- April 16: Ozaukee Economic Development Corporation Board
- April 20: Racine County Economic Development and Land Use Planning Committee
- April 21: Walworth County Board

Written comments were received from the City of West Bend, the American Civil Liberties Union (ACLU) Foundation of Wisconsin, the National Association for the Advancement of Colored People (NAACP) Milwaukee Branch, and three individuals. Verbal comments were provided during the presentations listed above.

SUMMARY OF MAJOR COMMENTS AND CHANGES MADE TO ADDRESS THE COMMENTS

1. **Key clusters.** There were several comments that the key industry clusters intended to be the focus of economic development efforts should be broadened. The key clusters have been revised to include food production, information technology, distribution, health services, and medical product research and development (see pages VI-2 and VI-3).
2. **EDA grants.** There were many comments and questions regarding EDA grants, including questions about grant eligibility, grant preparation and submittal, and evaluation criteria used by EDA. This information has been added on pages VIII-2 and VIII-3.
3. **Regional comparisons.** Information was requested that would provide comparisons between the Southeastern Wisconsin Region and similarly-sized metropolitan areas around the country, particularly in terms of incomes and other economic factors. This information has been added on pages V-6 and V-7, with associated tables on pages V-20 through V-25.
4. **Transportation and housing.** Comments were made that the Plan of Action (Chapter VII of the CEDS) should give more attention to the need for improved transit service, rail and highway improvements, and the need for housing affordable to area workers. Work efforts related to implementation of the regional transportation and housing plans that would help address these comments have been added on pages VII-13 and VII-14.
5. **Assistance to residents transitioning from Department of Corrections.** A comment was made that the CEDS should address the job training and sustainable housing needs of men and women transitioning to the community from the Department of Corrections. The “Principles and Action Plan” in Chapter VII has been revised to include action items related to workforce development to address this comment (see pages VII-9 and VII-14). Background information has been added on page VI-4.
6. **Measures to address minority unemployment.** Comments were made that the CEDS should include focused implementation measures to address minority unemployment, which is particularly high. The “Principles and Action Plan” in Chapter VII has been revised to add a goal to achieve greater equity in employment and income, and action items to help achieve this goal (see pages VII-14 and VII-15; additional programs in the Workforce Development section on pages VII-8 and VII-9; and an additional “At-Risk Youth Workforce Development” program on page VIII-7). Additional information and maps describing minority unemployment have been added to Chapter VI (see pages VI-3 and VI-4, and the associated maps on pages VI-17 through VI-20).
7. **Consideration of residential preference when filling new jobs.** Comments were made that the CEDS should consider an implementation measure to encourage filling new jobs created through EDA grants with residents of the community in which the project is located. The “Principles and Action Plan” in Chapter VII has been revised to add a recommendation that consideration be given by communities to

enact residential preference programs (see page VII-8), and that this information be tracked (see page VII-3).

8. **Relationship between areas of economic distress and areas with concentrations of minority residents.** A question was asked whether areas meeting EDA criteria for economic distress also have substantial minority population. A map comparing areas that meet EDA criteria for economic distress (counties or census tracts with unemployment rates 1 percent or higher than the national average or per capita incomes 80 percent or less than the national average) to census tracts where the percentage of minority residents is higher than the regional average was added (see Map VI-3 on page VI-19, and Item No. 6 above). Areas that meet EDA economic distress criteria largely coincide with areas in the Region with substantial minority populations.
9. **Milwaukee County Research Park and Regional Medical Center.** A comment was made that the CEDS should include additional information about the Milwaukee Regional Medical Center and Milwaukee County Research Park, which are important components of the regional economy. The requested information has been added on pages VI-13 and VI-14.
10. **County efforts.** A request was made to include more information about economic development programs and incentives carried out by county Economic Development Organizations, in addition to those to be carried out by the M7. The requested information has been added on pages VII-4 through VII-14.
11. **Local approval.** A suggestion was made that local governments should also be given the opportunity to review and approve the CEDS. EDA regulations require adoption of the CEDS by a majority of county boards in the Region as a prerequisite for designation as an Economic Development District. Support from local governments is also important, and the CEDS will be sent to each city, village, and town in the Region with a request that they consider endorsing the CEDS as a framework for economic development in the Region.