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DRIVING THE FUTURE

*A Strategy for Fostering Collaborative Economic Development
Along the Interstate-41 Corridor*

ACKNOWLEDGMENTS

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TIP Strategies, Inc. (TIP) is a privately held economic development consulting firm, with offices in Austin and Seattle. Established in 1995, TIP is committed to providing quality solutions for public and private sector clients. Community leaders across the country have embraced the TIP model of Talent, Innovation, and Place to achieve successful and sustainable economies.

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EXECUTIVE SUMMARY

INTRODUCTION

Driving the Future: A Strategy for Fostering Collaborative Economic Development along the Interstate-41 Corridor is part of an overall effort to build a more resilient and diversified manufacturing base in the five-county I-41 Corridor. The strategy provides an honest evaluation of the region's economic development strengths and challenges, informed by quantitative analysis, qualitative input from across the five-county corridor, and examples of national best practices. It articulates a set of unifying principles that reflect how regional stakeholders define economic development for the corridor. It provides a set of goals, strategies, and actions designed to promote economic diversification and collaboration through the enrichment of the region's talent base, infrastructure, and economic development networks. The regional strategy is not the responsibility of one organization to implement. It is a strategy for the entire I-41 Corridor and will require many engaged and committed partners for it to be successful.

APPROACH AND STRUCTURE

Over the course of eight months, the TIP Strategies consulting team worked closely with the East Central Wisconsin Regional Planning Commission (ECWRPC), the I-41 Corridor Advisory Committee, and dozens of regional stakeholders to identify the most promising opportunities to foster collaborative economic development in the I-41 Corridor. The first step was to establish a common understanding of assets and challenges. This discovery phase included roundtable discussions and interviews with over 70 people representing a broad cross section of regional stakeholders. Roundtable discussions were held in multiple locations in the region with groups representing important constituencies, including

- Education and workforce development officials,
- Real estate developers,
- Economic development and chamber professionals,
- Young professionals, and
- Transportation and general infrastructure officials.

In addition to roundtable discussions, interviews were conducted with several private employers and other economic development stakeholders. Appendix 5 provides a list of individuals who participated in individual interviews and roundtable discussions.

During this phase, a regional economic assessment that includes a wide range of data and analysis for the five-county region was conducted (Appendix 3). The assessment addresses topics such as economic indicators, labor force, commuting patterns, migration, industry analysis, and occupational analysis. A summary of key findings from the assessment is provided below.

The discovery phase also included an inventory of recommendations and strategies at both the regional and local levels. The recommendations were mined from 17 planning documents published between 2004 and 2016. The full report inventory summary is found in Appendix 4.

The opportunity phase involved a cluster and target industry validation analysis, which examined the existing target sectors being pursued and supported by the larger economic development organizations (EDO) in the region. The

existing targets were analyzed qualitatively and quantitatively to determine which sectors are being commonly targeted by the EDOs and if there are unique industry strengths that can be leveraged for regional benefit. A harmonized set of suggested regional cluster targets is provided along with specific niche subsector opportunities in Appendix 2.

During the implementation phase, TIP incorporated all the input, data analysis, and our experience working with regions across the country to develop the strategic plan. Following each of the three goals in the plan is an implementation matrix that outlines a proposed timeline for carrying out each of the strategies and actions. The matrix also suggests potential organizations to help support implementation.

Appendix 1 contains a corridor resource matrix that lists dozens of organizations in the five counties that play a lead or supporting role in over 30 economic development functions. The matrix was developed in concert with the ECWRPC and Envision Greater Fond du Lac, as part of the process to establish the Regional Entrepreneurial Development System (REDS).

The regional strategy should not be viewed as a static document, but as one that invites revisions and amendments as conditions change. For this reason, regional stakeholders should take a dynamic approach to implementation—one that revisits this plan on a regular basis to ascertain progress and to reprioritize strategies and actions as needed.

REGIONAL ASSESSMENT KEY FINDINGS

Appendix 4 presents a regional economic assessment that reveals numerous insights into the five-county I-41 Corridor economy. The most significant findings are highlighted below.

- **The I-41 Corridor has experienced modest population growth over the last decade.** The total population of the five counties rose by 45,000 residents from 2006 to 2016. While the region's rate of population growth (6 percent) has outpaced the state's (4 percent), it has lagged the national rate (8 percent).
- Looking forward, **the pace of population growth in the I-41 Corridor is expected to accelerate.** The State of Wisconsin's Demographic Services Center projects the region's population to reach nearly 869,000 by 2030, an increase of more than 110,000 residents. This translates to a compound annual growth rate of 0.9 percent, which exceeds the annualized rate for the 2006 to 2016 period.
- Natural increase and international immigration accounted for most of population growth in the region over the last 5 years. However, the **region experienced a net decline in domestic migration from 2013 to 2015.**
- **Current unemployment rates in each of the counties remain near the bottom of their historical ranges.** In 2016, the unemployment rate for the region stood at 3.7 percent.
- The I-41 Corridor enjoys generally **higher labor force participation rates** than the nation as a whole.
- **The I-41 Corridor is a major employment center** for all of Northeast Wisconsin, drawing in 26,000 net inbound commuters from outside the region on a daily basis. The sectors bringing in the largest number of commuters include manufacturing, healthcare, and finance and insurance.
- **The region is home to one of the nation's largest manufacturing bases.** The sector alone accounts for almost one-fifth of the region's job base and surpasses the nation's share of employment by nearly 11 percent.
- Since the end of the recession, **healthcare and manufacturing have been the dominant job-generating sectors in the corridor**, each adding over 4,500 jobs.
- The region's largest industries are mirrored in its **largest occupational groups: office and administrative support** (which contributes to a range of industries including manufacturing, corporate and regional offices, and finance and insurance) and **production** (an essential group of occupations that drive the manufacturing sector).
- **The region is home to a heavy concentration of production workers compared to the US.** Production jobs account for roughly 13 percent of all jobs in the region yet comprise only 6 percent of total employment in the US.
- **Over the next 5 years, the region is expected to have about 69,000 job openings.** More than 80 percent of these openings will be replacement jobs. Eighty-six percent of the middle-skill openings and 69 percent of high-skill openings are anticipated to result from replacement demand.

SWOT ANALYSIS

In addition to TIP Strategies review of economic and demographic data, our understanding of the I-41 Corridor was informed by roundtable discussions and meetings with regional business, community, and academic leaders. Based on these qualitative insights, along with our experience working with communities in the region and across the country, we have developed an analysis of the region's strengths, weaknesses, opportunities, and threats—commonly referred to as a SWOT analysis.

A SWOT analysis can be defined as follows.

- **STRENGTHS.** Advantages that can be built on to grow and strengthen the regional economy.
- **WEAKNESSES.** Liabilities and obstacles to economic development that could limit the region's growth potential.
- **OPPORTUNITIES.** Assets and positive trends that hold significant potential for increased regional prosperity and the attraction of new businesses, investments, and talent.
- **THREATS.** Unfavorable external factors and trends that could negatively impact the regional economy.

The results of our analysis are outlined below.



STRENGTHS

- Vibrant and stable manufacturing base.
- The corridor is an employment center for the larger region, drawing in thousands of commuting workers daily.
- High-quality, postsecondary educational institutions.
- Ongoing downtown and riverfront development efforts in many communities.
- Multiple organizations in the region supporting economic development.
- High level of collaborative initiatives (for example, NEW ERA, NEW Manufacturing Alliance, New North, IT Alliance).
- Events and attractions that bring in large numbers of outside visitors to the region and present a global brand (for example, Green Bay Packers, AirVenture, Mile of Music festival, Titledown District).



WEAKNESSES

- Talent availability (current and future) is the overriding challenge employers face.
- Negative net domestic migration in recent years (more domestic residents leaving the region than arriving).
- Shortage of workforce housing—especially higher quality housing options.
- Perceived disconnect between employers and economic development practitioners.
- Gaps in the regional entrepreneurship and innovation ecosystem.
- Lack of racial and ethnic diversity within the population.
- Lack of coordination among economic development organizations in the region, creating confusion within the business community.



OPPORTUNITIES

- Foster a greater understanding within the five counties of why the I-41 Corridor is an economic region.
- Greater alignment and coordination of existing local and regional economic development initiatives, for example, a regional talent summit to engage employers on devising strategies to meet future talent challenges.
- A comprehensive regional talent initiative for attraction and retention.
- Engage former residents through a regional “come home” campaign.
- Leverage existing festivals and events for investment and talent attraction.
- Regional and national promotion of assets and successes.
- Internal marketing for talent retention and networking.



THREATS

- Retirement associated with an aging workforce.
- Loss of skilled and professional talent to larger metro areas in the state (Milwaukee and Madison) and the Midwest (Chicago, Minneapolis–Saint Paul) seeking higher pay and urban amenities.
- Risk-averse culture in the region and state limits growth potential, in comparison to communities that place a higher priority on innovation and entrepreneurship.
- Major employers vulnerable due to ongoing and potential acquisitions, technology disruptions, and changing consumer behaviors.
- Expansion of existing businesses to markets outside the region.

GOALS

Driving the Future is built around three goals that serve as the foundations for attracting talent, strengthening infrastructure, and collaborating across borders within the I-41 Corridor. Under each goal are a number of strategies and actions needed for implementation.

GOAL 1. IMPLEMENT A COHESIVE REGIONAL TALENT STRATEGY.

STRATEGIES

- Establish an I-41 Corridor talent council to implement the talent strategy.
- Design and launch a regional talent campaign to support the recruitment of talent to the I-41 Corridor.
- Design a friends-and-family campaign to inform alumni in other areas of opportunities in the I-41 Corridor.
- Develop creative incentives designed to attract and retain talent.
- Build greater awareness of the I-41 Corridor’s job opportunities and strong employment base.
- Streamline business engagement and input mechanisms.
- Continue to support education and training institutions in strengthening the I-41 Corridor’s “homegrown” talent pipeline.

GOAL 2. ENHANCE THE CORRIDOR'S INFRASTRUCTURE AND ECONOMIC COMPETITIVENESS.

STRATEGIES

- Strengthen collective efforts to improve and expand the region's transportation and mobility infrastructure.
- Develop the I-41 Corridor as a "smart corridor."
- Develop a regional broadband strategy.
- Expand the inventory of competitive industrial sites and buildings in the region to accommodate business expansions and relocations.
- Explore the use of regional, revenue-sharing models to support regional economic development and infrastructure projects in the I-41 Corridor.

GOAL 3. FOSTER A STRONGER COLLABORATION ECOSYSTEM.

STRATEGIES

- Advocate forcefully and collaboratively around key infrastructure issues.
- Establish new opportunities for regional stakeholders to connect and work together on important regional economic development issues.
- Launch an internal marketing campaign designed to reinforce the collective approach for the region and create a sense of regional identity within the corridor.
- Fully leverage Microsoft's investments in the region to influence internal and external perceptions of the I-41 Corridor.

STRATEGIC PLAN

UNIFYING PRINCIPLES

In the context of an economic strategy, unifying principles are a set of statements expressing how the region defines economic development, regardless of changing internal and external circumstances. A clear set of unifying principles provides a framework and reference point for identifying and prioritizing opportunities, in addition to crafting the appropriate goals, strategies, tactics, and actions. Each principle is forward looking and helps point the region toward growth and improvement. With this in mind, the following unifying principles were drafted for the I-41 Corridor regional economic strategy.



1. COHESIVE

A cohesive approach is broad and balanced. It takes the various elements of economic development—from innovation to infrastructure to talent—and recognizes their interaction, linking organizations in a multidisciplinary framework.



2. CONNECTED

I-41 is a transportation corridor, but the communities along the Interstate are not necessarily connected by a common vision. This plan seeks to reinforce the relationships that result in regional benefits.



3. INNOVATIVE

Businesses that are not constantly reinventing themselves are in danger of the latest disruptive technologies. Innovation must be reinforced both from an entrepreneurial perspective and from within industry itself.



4. SUSTAINABLE

Sustainability has two dimensions. One is economic and speaks to the growth of industries committed to the region. The other is to ensure that environmental sustainability is built into the foundation of all companies operating in the corridor.

IMPLEMENTATION CONSIDERATIONS

Driving the Future is an ambitious plan that proposes numerous strategies and actions. It is not feasible for any one organization to lead and coordinate implementation in such a large region. Rather, it will take a coalition of organizations and stakeholders who are willing to either lead or support the implementation of specific strategies and actions.

Below is a list of organizations that have provisionally been identified as potential partners in implementing the plan. However, this is only an initial list. Some might not be able or appropriate to support implementation; while there might be others that are not listed below or in the plan.

ABBREVIATION	DEFINITION
NNInc	New North, Inc.
NEWCC	Northeast Wisconsin Chambers Coalition
NEW ERA	Northeast Wisconsin Educational Resource Alliance
NEWREP	Northeast Wisconsin Regional Economic Partnership
BLRPC	Bay-Lake Regional Planning Commission
ECWRPC	East Central Wisconsin Regional Planning Commission
FVWDB	Fox Valley Workforce Development Board
BAWDB	Bay Area Workforce Development Board
NEWMA	Northeast Wisconsin Manufacturing Alliance
NEWITA	Northeast Wisconsin IT Alliance
CCs	Chambers of Commerce
CVBs	Convention and Visitors Bureaus
EDOs	Economic Development Organizations
K12s	K–12 Educational Institutions
LGs	Local Governments (municipalities and counties)
TC	I-41 Talent Council*
ON	Oneida Nation
WPS	Wisconsin Public Service
WEDC	Wisconsin Economic Development Corporation
WDWD	Wisconsin Department of Workforce Development
WPSC	Public Service Commission of Wisconsin
WDOT	Wisconsin Department of Transportation

*Proposed

GOAL 1. IMPLEMENT A COHESIVE REGIONAL TALENT STRATEGY.

The regional planning process included interviews with several prominent business leaders seeking to identify the key issues related to the I-41 Corridor's long-term economic competitiveness. All were proud to be operating in the region and generally positive on the future of Northeast Wisconsin. However, when asked, "What issues keep you up at night?" all the business leaders responded that **access to talent is their number one challenge**.

This issue is not unique to Northeast Wisconsin. Per *Area Development* magazine's 2016 Survey of Corporate Executives, availability of skilled labor was ranked as the second most important factor for location decisions, trailing only highway accessibility. In the 2015 survey, skilled labor availability was the top-ranking factor. Over the past few years, these two issues have swapped positions as the two most important factors in the annual *Area Development* survey.

Discussions with employers in Northeast Wisconsin reveal that companies are forced to go to greater lengths to identify and recruit new skilled workers. While the I-41 Corridor is an employment center that draws in 26,000 net inbound commuters from outside the region on a daily basis, many employers still experience worker shortages, both skilled and unskilled. Professional services firms report difficulty recruiting engineers, accountants, architects, and other high-skill professionals to the region. Manufacturers are investing heavily in automation and robotics to ease the pressure caused by worker shortages. Most troubling, some confide that they might have to look outside the region to expand.

A recent report issued by the UW-Madison Applied Population Lab highlights the challenges many communities in Wisconsin face to increase or even retain young people. The study concludes that only about 15 percent of Wisconsin communities are gaining and maintaining young adults.¹ The talent availability challenge is not a secret to economic development professionals, educators, and workforce development officials in the I-41 Corridor. They are keenly aware of the underlying demographic trends within the region and the workforce shortages employers are facing. Many are engaged in local initiatives to attract more workers, especially skilled Millennials, to their communities. There are also regional marketing initiatives focused on talent attraction. Despite this, local and regional stakeholders admit that the I-41 Corridor lacks a comprehensive and cohesive talent strategy that connects existing efforts and coordinates resources.

FIGURE 1. AREA DEVELOPMENT CORPORATE SURVEY 2016*
COMBINED RATINGS

SITE SELECTION FACTORS	2016	2015
RANKING		
Highway accessibility	94.4	88.0 (2)
Availability of skilled labor	89.9	92.9 (1)
Labor costs	89.6	80.8 (3)
Occupancy or construction costs	84.0	85.4 (4)
State and local incentives	75.8	75.8 (9)
Corporate tax rate	82.3	78.8 (7)
Tax exemptions	79.7	74.7 (11)
Energy availability and costs	78.5	75.3 (10)
Proximity to major markets	78.1	76.3 (8)
Quality of life	76.4	87.6 (3)

*All figures are percentages and are the total of "very important" and "important" ratings of the **Area Development** Survey of Corporate Executives and are rounded to the nearest tenth of a percent.

Source: **Area Development**, "31st Annual Survey of Corporate Executives," Q1 2016.

¹ *Gaining and Maintaining Young People in Wisconsin Communities*. UW-Madison Applied Population Lab, 2017, apl.wisc.edu/shared/youngadults.

The recommendations below outline a regional talent strategy that increases the access that employers have to talent. It also seeks to better align regional resources and initiatives.

1.1. Establish an I-41 Corridor talent council to implement the talent strategy.

The capacity and resources to implement the recommended talent strategies and actions do not currently exist within a single organization. Most metro areas and regions that pursue similar talent strategies utilize a single existing organization (for example, metro area chamber) or establish a specific nonprofit organization dedicated to regional talent and workforce issues. New North is presently working to address these issues on a regional basis. However, New North lacks the resources and staffing necessary to carry out the ambitious regional talent strategy outlined here. Moreover, it has responsibility for serving a wider 18-county region in Northeast Wisconsin.

Therefore, TIP proposes that—absent the creation of a new entity—a talent council be formed within the organizational framework of New North. This council would be charged with overseeing the implementation of the talent strategy within the five counties of the I-41 Corridor. The I-41 Corridor talent council would consist of representatives of private employers, economic development organizations, and workforce and educational institutions located in the corridor. The council should launch a public–private fundraising campaign to pay for a full-time staff position who would manage the strategy’s implementation and serve as regional “talent concierge” (see Strategy 1.2.5) and to cover the costs of new talent marketing materials and expenses. The I-41 Corridor talent council could serve as a proof of concept that—if successful—could eventually be extended to lead talent attraction efforts of the entire Northeast Wisconsin region.

1.2. Design and launch a regional talent campaign to support the recruitment of talent to the I-41 Corridor.

Northeast Wisconsin is not only engaged in a fierce competition for new businesses and investment, it is also competing with other regions (in the state, in the Great Lakes region, and nationally) for high-skill talent.

The Wisconsin Economic Development Corporation (WEDC) recently launched a \$1 million social media marketing campaign to convince young professionals in the Chicago area to consider living and working in Wisconsin. Regionally, New North initiated the “Life in the New North” campaign, featuring a video series highlighting the amenities and advantages of living and working in Northeast Wisconsin. Local efforts, such as Fox Cities Regional Partnership “Talent Upload” events seek to highlight community attributes and build relationships with local employers.

Beyond these efforts, employers along the I-41 Corridor would benefit from a multifaceted talent recruitment campaign that builds off existing state, regional, and local initiatives while actively engaging employers. Such a campaign would support regional employers—both large and small—in addressing their talent management and recruitment challenges and to focus on the areas where they can have the most success. Formalized and standardized recruitment tools and assistance can ensure that employers have access to high-quality information resources and showcase the aspects of the region that will gain the most traction with their prospective employees. Joint marketing can demonstrate the strength and depth of the I-41 Corridor’s employment base and labor market. Building buzz through social media can also attract the attention of prospective employees.

1.2.1. Create a new online talent portal that provides relocation information about working and living in the I-41 Corridor.

- Tailor messaging and content to appeal to specific target groups—C-level executives, young professionals, military veterans, and racially diverse talent.
- Existing state and regional talent initiatives, including WEDC’s “Think • Make • Happen in Wisconsin” and “Life in the New North” should be considered and integrated into the I-41 Corridor talent portal to avoid duplication and fully leverage these resources.

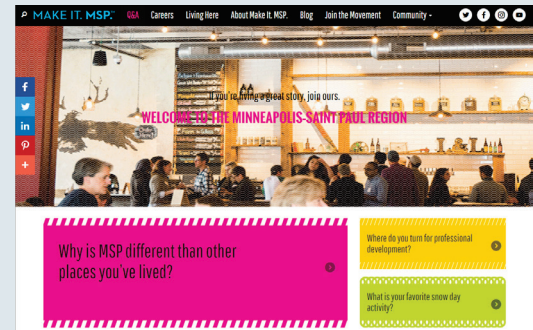
1.2.2. Assemble a multigenerational and diverse group of “ambassadors” to help sell the region by participating in recruitment events and activities.

- Local young professional (YP) groups should be a primary source for ambassadors.
- Educate ambassadors about the opportunities in the region and distribute information packets.
- Encourage ambassadors to participate in the talent campaign online (social media) and in person.
- Use a tool, such as SocialToaster (socialtoaster.com), to engage these ambassadors and push content to their networks.

1.2.3. Leverage the resources, networks, and skills offered by local convention and visitors bureaus (CVB) to support talent and industry attraction.

- Work with local CVBs to tie their conference and meeting strategies to targeted occupations and professional member organizations.
- Identify industry associations within each target industry and encourage them to consider Northeast Wisconsin as a destination for annual events and meetings.

MAKE IT. MSP



“Make It. MSP” is a greater Minneapolis–Saint Paul (MSP) talent initiative that was developed and launched in 2015. The makeitmsp.org website serves as the platform for the initiative, providing information on the initiative and also information for individuals considering a move to the MSP region.

To heighten its impact, Make It. MSP has recruited more than 100 “makers” to its “Makers Hub” network, in which community-minded individuals and organizations collaborate around four specific areas:

- Radical Welcomers—dedicated to personally welcome newcomers to MSP.
- Career Acceleration—working to help more than 3,000 local professionals advance their careers.
- Leaders of Color—supporting leadership development opportunities that showcase rising leaders of color in the region.
- Get Involved. MSP—connecting civic engagement opportunities with residents to help get them more deeply involved in the community.

The initiative is focused on three target talent groups: newcomers, professionals of color, and tech talent.

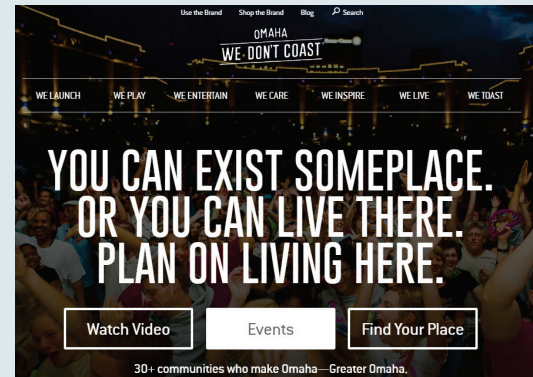
For more information about the initiative, visit Make It. MSP’s recent talent report at: <http://makeitmsp.org/>

- Leverage existing major events and festivals such as the Experimental Aircraft Association (EAA) AirVenture Oshkosh, Mile of Music festival, and Green Bay Packers games to market the region to visitors.
- Utilize the specialized marketing and promotion skills CVBs offer to develop marketing content and materials for talent attraction.

1.2.4. Organize talent roadshows to create opportunities for regional employers to jointly market to prospective talent pools.

- Look for opportunities to take the talent roadshow to other markets where a critical mass of local companies is recruiting. This should be coordinated with any trade missions or industry trade shows related to regional industry clusters
- Travel to major events, such as South by Southwest (SXSW) in Austin, TX, to represent regional employers at the job market exhibition.
- Track other markets that have talent local employers need. Identify opportunities for joint marketing in response to layoffs or other events.
- Address graduating classes of select universities in areas of particular specialization (similar to corporate job fairs).

OMAHA: WE DON'T COAST



The Omaha Chamber of Commerce launched the “We Don’t Coast” campaign in an effort to support its local technology companies in talent recruitment. This campaign supplemented the efforts to strengthen the local talent pipeline.

As part of the initiative, the Chamber tracked announced layoffs from companies around the country and then structured a recruitment initiative around the layoff event.

In one case, the Chamber leaders targeted soon-to-be-laid-off Microsoft employees in Seattle and IT workers in Seattle with a specific Omaha connection. They sought to reach their audience by handing out stickers and messages written in code that directed people to a special website. This website had a comparison of Omaha and Seattle in addition to links to job listings from five Omaha-based companies.

In addition, Chamber members attended specific IT-focused events to get in front of their target audiences and leveraged social media outlets (Facebook, LinkedIn, and Reddit) to distribute their messaging to a wider tech-oriented audience.

1.2.5. Develop a recruitment services program to support employers.

- Create a full-time position to serve as a “talent concierge” for regional employers. Such a position would be tasked with working directly with employers to assist in connecting them with outside talent. In effect, the talent concierge would work to convert the leads generated by the talent marketing campaign to new employees. This position could be created to run the talent council. If needed, the role of a talent concierge could also be filled by staff of existing local organizations engaged in talent attraction efforts.
- Package and distribute information resources to employers that cover topics of interest (for example, housing, education, entertainment, and recreation) for potential recruits. These should be in multiple formats—online, presentation, and print.
- Provide community presentation templates containing pertinent data for employers to use for their recruitment events. These presentations should contain detailed information about the I-41 Corridor tailored to the interests of particular audiences (for example, cost of living comparisons). The presentations could be offered as a service to employers and could include a panel of community ambassadors who would field questions.

BATON ROUGE AREA CHAMBER

The Baton Rouge Area Chamber of Commerce (BRAC) employs a full-time director of talent development to serve as a “talent concierge” for regional employers. This position is responsible for developing creative solutions for connecting employers to talent leads generated by the BRAC’s talent marketing campaign.

Source: See <http://www.brac.org/lifeinbr/>.

1.3. Design a friends-and-family campaign to inform alumni in other areas of opportunities in the I-41 Corridor.

- 1.3.1.** Assemble a network of local alumni associations—both high school and college—that are willing to push content to their alumni networks.
- 1.3.2.** Organize a committee that includes influential alumni and young professionals to be champions for the network.
- 1.3.3.** Use this network to communicate regularly with alumni. Share information such as job opportunities, arts and cultural events, notable economic development activities, and other types of information that will build awareness of the positive things going on in the I-41 Corridor and will draw the alumni back.
- 1.3.4.** Invite alumni interested in moving back to the region to post their résumés on a new talent portal and encourage more regional employers to post job openings.
- 1.3.5.** Create online forums where alumni can interact with one another.

1.4. Develop creative incentives designed to attract and retain talent.

Financial incentives often play a key role in helping to attract new business investments and jobs to a community, region, or state. Wisconsin’s successful recruitment of Foxconn, which includes a multibillion-dollar state and local incentives package, shows just how aggressive the state is prepared to be with respect to attracting new business investment. Financial incentives could also support efforts to attract new talent to the state and region. While the State of Wisconsin would likely have a central role in adopting and funding

public talent attraction incentives, regional leaders should also explore opportunities to partner with regional employers to develop regionally focused incentives.

- 1.4.1.** Urge the State of Wisconsin to establish a statewide talent attraction incentive.
- For example, there is a current proposal in the Wisconsin State Assembly to establish a student loan repayment incentive in Wisconsin similar to one offered in Kansas through its Rural Opportunity Zone program (see text box).

KANSAS RURAL OPPORTUNITY ZONES

Kansas Rural Opportunity Zones were established by the Kansas Legislature in 2011 to facilitate population growth in rural counties using tax relief and student loan reimbursement. The program authorizes 77 counties to offer one or both of the following financial incentives to new full-time residents.

- Student loan repayments up to \$15,000
- Kansas income tax waivers for up to 5 years

Source: See <https://kansascommerce.gov/320/Rural-Opportunity-Zones>.

- 1.4.2.** Work with regional employers to develop public-private talent attraction incentives available to both rural and nonrural communities.
- Gauge the interest and willingness of key employers and local governments in the region to financially support a regional talent attraction incentive fund.
 - A 501(c)(3) organization could be formed to raise money and administer the incentive fund.
 - Potential incentives could address student debt, housing expenses, or relocation expenses for new residents meeting certain residential and qualifications requirements.

- 1.5.** Build greater awareness of the I-41 Corridor's job opportunities and strong employment base.

One of the barriers to recruitment that some employers cited is the lack of awareness by residents and prospective employees of the tremendous career opportunities available in the region, especially in the manufacturing sector. Creating and distributing better information that highlights the depth and diversity of the region's manufacturing can help address this barrier.

- 1.5.1.** Compile and maintain key regional economic data, a list of job postings that includes high-demand skills and certifications, and major employers by sector.
- Use this information to demonstrate the depth of the regional employment base to potential recruits and residents.
 - Package this information with other recruitment information to create packets for employers and "ambassadors."
 - Update the information at least quarterly.
- 1.5.2.** Distribute this information through various channels that will reach residents and prospective recruits.
- Publish the information on the regional talent portal and make it available for download.
 - Publicize the information on websites that are commonly used to research the community and make the information available to human resource (HR) professionals in the region.
 - Distribute it through a wide range of online media channels and in partnership with regional postsecondary institutions and workforce development organizations.

- Present this information to career counselors and to high school and college students who are entering the job market.
- Write a series of blog posts or articles about job searching in the region that highlight the most in-demand occupations and skills and employers who are hiring.

1.6. Streamline business engagement and input mechanisms.

1.6.1. Continue to support the sector partnership model as a means of business engagement (for example, manufacturing alliance, IT alliance, healthcare alliance).

- Conduct annual employer surveys to document needs in critical occupations.
- Coordinate with alliances to use industry skills panels to evaluate curricula.
- Facilitate the launch of new alliances as needed.

1.6.2. Provide opportunities for employers to build relationships with students and showcase their place of work and opportunities for students to learn about a wider range of career options.

1.7. Continue to support education and training institutions in strengthening the I-41 Corridor’s “homegrown” talent pipeline.

While there are many great workforce training and education programs in the region, the capacity and reach of the programs will need to increase to meet the regional demand for talent, particularly around high-demand occupations.

1.7.1. The member institutions of the Northeast Wisconsin Educational Resource Alliance (NEW ERA) and other workforce training providers should closely analyze regional training capacity with respect to industry demand.

- Create an inventory of workforce training programs in the region related to the critical occupations identified by the sector partnerships and to other high-demand occupations.
- Document program enrollment, completions, and constraints (student awareness, classroom/lab space, instruction equipment, instructors, clinical space).
- Use this information to identify gaps in programming and how gaps can be addressed.

1.7.2. Assist education and training institutions in finding the instructors they need.

- Explore the feasibility of providing private subsidies for instructors in occupations where pay differential between workplace wages and instructor wages is high (for example, computer science, engineering). Employers could contribute with donations.
- In conjunction with sector partnerships, set up programs for “instructors on loan,” where employers would provide qualified employees or recent retirees to serve as course instructors for a 1-year term.

GOAL 1 IMPLEMENTATION MATRIX

	POTENTIAL PARTNERS	TIMEFRAME			
		Ongoing	Next 12 mos.	1 to 3 years	3 to 5 years
GOAL 1: IMPLEMENT A COHESIVE REGIONAL TALENT STRATEGY					
Strategy 1.1. Establish an I-41 Corridor talent council to implement the talent strategy.	NNInc, NEW ERA		◆		
Strategy 1.2. Design and launch a regional talent campaign to support the recruitment of talent to the I-41 Corridor.	I-41 Talent Council, NNInc, WEDC, NEWMA, NEWITA, CVBs			◆	
Strategy 1.3. Design a friends-and-family campaign to inform alumni in other areas of opportunities in the I-41 Corridor.	I-41 Talent Council, NEW ERA, CCs, CVBs			◆	
Strategy 1.4. Develop creative incentives designed to attract and retain talent.	I-41 Talent Council, NNInc, NEWCC, EDOs			◆	
Strategy 1.5. Build greater awareness of the I-41 Corridor's job opportunities and strong employment base.	I-41 Talent Council, NEW ERA, NEWMA, NEWITA, BAWDB, FVWDB, K12s			◆	
Strategy 1.6. Streamline business engagement and input mechanisms.	NEWMA, NEWITA, NNInc, EDOs	◆			
Strategy 1.7. Continue to support education and training institutions in strengthening the I-41 Corridor's "homegrown" talent pipeline.	NEW ERA, BAWDB, FVWDB, WDWD, K12s	◆			

GOAL 2. ENHANCE THE CORRIDOR'S INFRASTRUCTURE AND ECONOMIC COMPETITIVENESS.

In addition to talent, the I-41 Corridor's economic competitiveness is significantly influenced by the quality of the region's infrastructure. In any region, first-class infrastructure is essential for retaining existing employers and residents, in addition to attracting new investment and talent. The corridor itself is defined and linked by I-41, which was only added to the Interstate Highway System in 2015. The fact that highway accessibility was the top site selection factor in *Area Development's* 2016 Survey of Corporate Executives (see Goal 1 introduction) illustrates how important I-41 is to the region's economy. However, infrastructure is more than just highways and roads, it is an interconnected system that encompasses airports, trails, bike lanes, sites, water, et cetera. It must also reach every area that can support economic development—from industrial and commercial sites to vibrant urban centers and to the rural areas.

The definition of essential infrastructure has extended even further and now includes things like high-speed internet access, a technology that was not in widespread use just a few decades ago. The extension of broadband communications throughout cities and regions allows for the introduction of emerging "smart city" technologies into public infrastructure. Just as robotics and automation are disrupting traditional manufacturing, emerging technologies such as Internet of Things (IoT) sensors and artificial intelligence are increasingly disrupting the way cities manage transportation, energy, pollution control, and public safety.

As part of the planning process, roundtable discussions were held focusing on the region's transportation and general infrastructure. Participants were key stakeholders representing several communities, counties, and agencies within the region. These discussions yielded important insights into critical infrastructure needs within Northeast Wisconsin and external constraints impacting potential solutions.

2.1. Strengthen collective efforts to improve and expand the region's transportation and mobility infrastructure.

- 2.1.1.** Support the long-term planning and funding of the I-41 Corridor expansion for the remaining two-lane segments between Grand Chute and De Pere, and between Oshkosh and Fond du Lac.
- 2.1.2.** The four existing metropolitan planning organizations (MPOs) should work in partnership to leverage state and federal funding for the I-41 Corridor-related improvements, including public transit and connecting highways systems.
- 2.1.3.** I-41 Corridor communities should support the planning for and development of local and regional bicycle and trail networks.
 - Bike lanes and trails are widely considered standard recreational amenities that communities and regions must invest in if they hope to compete for young talent. Moreover, these networks should be regarded as important components of the region's mobility infrastructure, especially as younger workers increasingly seek alternative commuting options.
- 2.1.4.** EDOs along the corridor should actively participate in MPOs' planning activities and serve as members on their advisory committees.
- 2.1.5.** Corridor-level public transit connectivity should be evaluated and improved to link workers with jobs.
 - EDOs should actively participate and support the ECWRPC's I-41 Corridor commuter service study, and the four, regional, transit system's individual transit development plans (Valley Transit [Fox Cities] and GO Transit [Oshkosh] are being updated in 2018–2019 by ECWRPC).

2.1.6. Work collectively to convince the Wisconsin Legislature to pass a bill permitting municipalities and regions to establish regional transit authorities (RTA).

- If supported by local governments and approved by voters through a referendum, RTAs allow local communities to pay for transit systems using local sales taxes. Currently, public transit must be paid for using general revenue, which is funded by property taxes. RTAs offer communities and regions additional flexibility and revenue to pay for public transit enhancements. The Fox Cities are currently pursuing legislation to allow for the creation of an RTA. Other municipalities and organizations should actively support the Fox Cities efforts and pursue their own.

2.1.7. Develop a regional plan for promoting alternative commuting modes.

2.1.8. Monitor and support initiatives to expand and improve transportation and freight connectivity in neighboring regions.

- Stay connected to regional transportation planning that impacts the I-41 Corridor, especially within the Chicago–Milwaukee corridor.
- Constantly look for best practices and new concepts other regions and corridors are utilizing to improve their regional transportation infrastructures.

2.2. Develop the I-41 Corridor as a “smart corridor.”

To enhance the sustainability, reliability, efficiency, and safety of the I-41 Corridor, local and regional stakeholders should embark on a long-term program to integrate smart city technologies into the region’s transportation infrastructure, including autonomous, connected, electrical, and shared (ACES) vehicle technologies; data and analytics, and Internet of Things (IoT) sensors.

2.2.1. Identify opportunities to demonstrate smart city technologies through pilot projects in the corridor.

- See the adjacent text box for an example of how Atlanta is developing a smart corridor through a demonstration project.

2.2.2. Expand the concept and adoption of innovative technologies to improve other critical infrastructure needs in the region, such as energy, water/wastewater, and broadband/digital.

2.3. Develop a regional broadband strategy.

Broadband is widely regarded as an essential infrastructure needed to support commercial and entrepreneurial activity. The map in Figure 2 shows that much of the I-41 Corridor, especially areas adjacent to Interstate 41, has relatively strong broadband coverage (wireline download speeds of 25+ megabits per second). However, there are outlying rural parts of

ATLANTA NORTH AVENUE SMART CORRIDOR

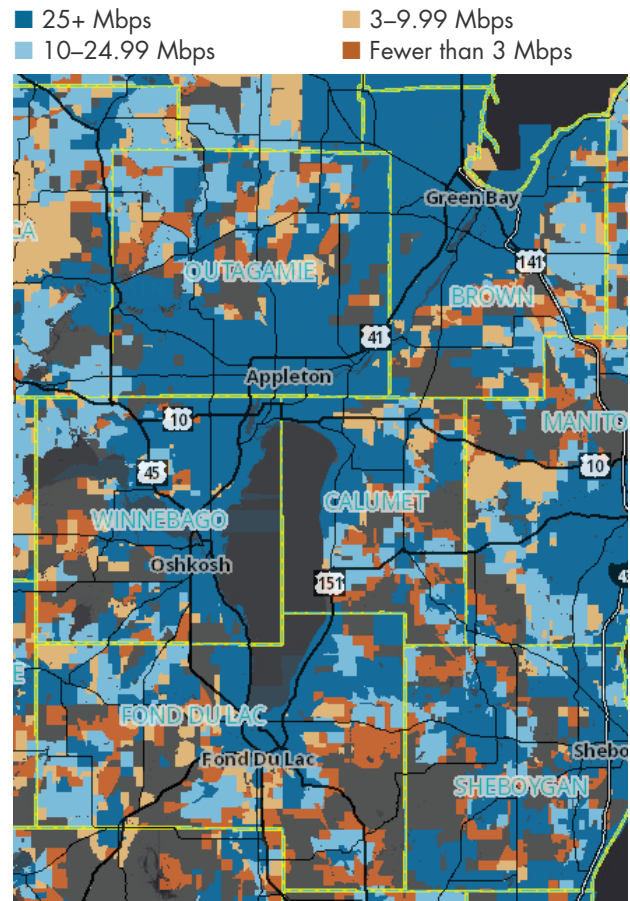
The City of Atlanta and the Georgia Institute of Technology are partnering on a pilot initiative to create a smart transportation corridor within the city. North Avenue Smart Corridor is a \$3 million public demonstration project that will serve as a “living lab” for incorporating technologies such as Internet of Things (IoT) deployment, data collection and analytics, and connected and autonomous vehicles into a key traffic arterial in the city. The goal is for the North Avenue Smart Corridor to be a testbed for how the city can fundamentally transform the way it plans, designs, constructs, and manages its transportation infrastructure. Phase 1 of the project will include the installation and use of over 100 IoT sensors at 18 signalized intersections, an adaptive signal timing system, and vehicle-to-infrastructure communications. A planned phase 2 will promote the use of autonomous vehicles in the corridor.

Source: See <https://www.atlantaga.gov/Home/Components/News/News/7155/> & <http://renewatlantabond.com/project/north-avenue-smart-corridor/>.

the region that lack decent broadband coverage. The Public Service Commission of Wisconsin (WPSC) does offer a broadband grant program, which is designed to encourage the deployment of advanced telecommunications capability in underserved areas of the state. These grants subsidize construction of broadband facilities for providers and local communities in rural areas and reduce the financial risk of building out the broadband service.

- 2.3.1.** Regional planning, government, and utility providers should develop an inventory of underserved areas of the region.
 - 2.3.2.** Identify areas and sites that would be appropriate candidates for WPSC broadband expansion grants and submit applications.
 - 2.3.3.** Partner with the Microsoft through its new TechSpark initiative to extend broadband access to rural areas. (See Strategy 3.4.)
 - 2.3.4.** Annually review and evaluate the inventory of underserved sites.
- 2.4.** Expand the inventory of competitive industrial and commercial office sites and buildings in the region to accommodate business expansions and relocations.
- 2.4.1.** Identify one or more potential “megasites” of 400 to 1,000 acres along the I-41 Corridor, which could accommodate a large single corporation.
 - New North is presently working with EDOs in the region to identify the best location(s) for industrial megasites and agree to feature it for future large projects.
 - In addition to large industrial sites, the region should identify appropriate sites for large scale corporate headquarter and commercial office facilities. Amazon’s ongoing search for a second North American corporate campus (HQ2) is an example of an opportunity the I-41 Corridor should position itself to compete for. While the region was not selected for the HQ2 shortlist, there will certainly be other large corporate headquarters or commercial office projects more suited to the region’s strengths.
 - 2.4.2.** Increase the number of WEDC certified sites in the corridor.
 - 2.4.3.** Explore options for developing shared regional industrial parks that serve multiple counties in the region.

FIGURE 2. WIRELINE DOWNLOAD SPEEDS
ADVERTISED SPEEDS



Note: Mbps stands for megabits per second.
Source: Wisconsin Broadband Map—Public Service Commission of Wisconsin, Wisconsin Broadband Office.

- The State of Kentucky has established a regional industrial park program that allows each county that participates in a regional industrial park to share in tax revenues generated by the park. (See text box.)

2.5. Explore the use of regional, revenue-sharing models to support regional economic development and infrastructure projects in the I-41 Corridor.

Revenue sharing involves pooling a portion of the new growth in a community's tax base and then distributing the pool back to the participating communities through a formula that reduces tax-base disparities. It has been successfully utilized in other regions of the US to bolster regional economic development and reduce the poaching of employers. Examples of successful regional revenue sharing programs include the following.

KENTUCKY REGIONAL INDUSTRIAL PARK PROGRAM

The Kentucky Local Government Economic Development Fund (LGEDF) provides grants of coal severance tax revenues to assist counties in enhancing existing businesses and securing new industries. Coal-producing counties receive an allotment of LGEDF funds for use only in the county. Another portion of LGEDF funding is dedicated to regional projects. LGEDF supplies funding for the Regional Industrial Park Program, which has established several regional industrial parks across Kentucky. The goal of the program is to develop large regional industrial sites in a cost-effective way, without regard to county boundaries, that will result in greater development and more job opportunities for the larger region. Each county that participates in a regional industrial park shares in the tax revenues generated by the park.

- **Twin Cities Fiscal Disparities Program (Minneapolis–Saint Paul, MN):** In operation since 1971, the program encompasses seven counties and many taxing jurisdictions. Contributions to the regional, revenue-sharing pool are based on growth in commercial and industrial property tax (<https://metro council.org/Communities/Planning/Local-Planning-Assistance/Fiscal-Disparities.aspx>).
- **Allegheny Regional Asset District (Pittsburgh, PA, Region):** The program seeks to promote economic development and improvement in equity across political jurisdictions with specific attention to core cities. Tax revenues are divided three ways: 50 percent supports regional cultural and recreational assets, 25 percent goes to county government, and 25 percent is shared with municipal governments (<http://radworkshere.org/>).
- **Montgomery County ED/GE Program (Dayton, OH, Region):** This program has two components—an economic development component, in which 70 percent of the funds are distributed through a grant process back to participating communities, and a government equity fund, which uses more sophisticated formulas to distribute funds and ensure greater equity among jurisdictions (<http://www.co.montgomery.oh.us/montcnty/pdf/edgecrit.pdf>).

GOAL 2 IMPLEMENTATION MATRIX

	POTENTIAL PARTNERS	TIMEFRAME			
		Ongoing	Next 12 mos.	1 to 3 years	3 to 5 years
GOAL 2: ENHANCE THE CORRIDOR'S INFRASTRUCTURE AND ECONOMIC COMPETITIVENESS					
Strategy 2.1. Strengthen collective efforts to improve and expand the region's transportation and mobility infrastructure.	ECWRPC, BLRPC, WDOT, LGs, EDOs				◆
Strategy 2.2. Develop the I-41 Corridor as a "smart corridor."	LGs, ECWRPC, BLRPC				◆
Strategy 2.3. Develop a regional broadband strategy.	LGs, EDOs, WPSC, ECWRPC, BLRPC				◆
Strategy 2.4. Expand the inventory of competitive industrial sites and buildings in the region to accommodate business expansions and relocations.	NNInc, WPS, WEDC, EDOs	◆			◆
Strategy 2.5. Explore the use of regional, revenue-sharing models to support regional economic development and infrastructure projects in the I-41 Corridor.	LGs, EDOs, ECWRPC, BLRPC			◆	

GOAL 3. FOSTER A STRONGER COLLABORATION ECOSYSTEM.

A regional strategy must increase the ability of stakeholders to work in a coordinated manner. Absent that coordination, economic development opportunities might be missed entirely. Establishing a collaborative approach, however, does not come easily. There are legitimate competing interests among the region's municipalities, counties, economic development organizations, and businesses, and these interests must be respected. Nevertheless, no single community can function without its neighbors. Reinforcing the common interests of the I-41 Corridor is the only way in which regional economic benefits can be realized.

What are those common interests? Infrastructure improvements, talent attraction, and business recruitment are standout examples. Once the region's residents appreciate the common challenges represented by a shared infrastructure and a regional workforce, collaboration becomes much easier. In other words, residents—and economic development organizations—are more likely to accept that a success anywhere in the five counties will benefit everyone.

An effective approach to meeting this challenge is to coalesce around a common brand and image of the I-41 Corridor. This plan recommends that regional economic development stakeholders launch an internal marketing campaign designed to highlight the corridor's shared interests, specifically around infrastructure and business recruitment, and to promote positive and consistent messaging.

Improving awareness of the attributes and strengths among the existing population should also serve to support efforts at attracting and retaining a talented workforce, especially among Millennials. The I-41 Corridor's best salespeople are its own residents. If they are knowledgeable about the region's assets and successes and sharing them through their own social networks, the word will get out.

3.1. Advocate forcefully and collaboratively around key infrastructure issues.

3.1.1. Create an I-41 Corridor policy agenda to inform relevant state and federal policymakers of the corridor's key infrastructure funding needs.

- Continue to advocate for increased funding for highway infrastructure and airport improvements.
- Pursue approval and funding for the development of a new intermodal facility at the Port of Green Bay, which would allow the port to handle container shipments of finished goods.

3.1.2. Enlist the region's business community to become more involved in resolving statewide transportation issues affecting the I-41 Corridor and connecting highway system.

REGIONALISM

Regionalism, or regional collaboration, is an important economic development concept and mindset based on the principle that working together toward a common purpose is more efficient and effective than competing or operating in a vacuum. All partners of a regional body must buy in to this precept for the effort to have maximum impact. Regionalism has become an increasingly important tool in rural economic development because it pools resources for maximum impact and allows communities with limited resources to be more competitive than they could be on their own. Regionalism requires not just cooperation, but true collaboration, alignment of values, and leveraging of resources. Regionalism cannot be overemphasized as a useful tool for advancement of the I-41 Corridor.

The 2015 International Economic Development Council (IEDC) annual survey on the state of economic development found that 90 percent of respondents indicated that they had "entered into partnerships or combined resources with other community stakeholders to enhance economic development efforts" within the past year.

Source: See IEDC Annual Survey on the State of Economic Development, 2016.

- ECWRPC was recently awarded funding from the Federal Transit Administration for the I-41 Corridor commuter service study, which will require the engagement and input from the region's business communities and EDOs.
- 3.1.3.** Explore the formation of a business infrastructure council in the region, which would involve the business community directly in advocating for the future needs in the areas of mobility, roads, development, and growth.
- Some chambers around the country have established infrastructure councils for this purpose. The Infrastructure Council within the Metro Atlanta Chamber is one example (<https://www.metroatlantachamber.com/councils/infrastructure-council>).
- 3.2.** Establish new opportunities for regional stakeholders to connect and work together on important regional economic development issues.
- 3.2.1.** Institute a set of regional protocols and mechanisms for sharing information, leads, and opportunities among EDOs and other economic development stakeholders in the corridor.
- The Northeast Wisconsin Regional Economic Partnership (NEWREP), which is an existing network of economic development professionals, could lead an effort to develop protocols and mechanisms for EDOs in the corridor to share information about regional opportunities.
 - In some cases, such as with the Amazon HQ2 project or with prospective large investment prospects, regional proposals could be developed that harness all the assets and capabilities in the I-41 Corridor.
- 3.2.2.** Create an annual I-41 Corridor forum to promote success stories, educate stakeholders about important local and regional initiatives, and communicate progress toward implementing the regional economic development strategy.
- Invite stakeholders from each of the five counties and representatives of regional organizations to present local initiatives and successes to a regional audience.
 - Invite EDO representatives from nearby communities in Waushara, Waupaca, and Shawano Counties to attend.
 - Arrange a group discussion to address important regional economic development issues.
 - Rotate the location of the forums within the corridor to feature significant local assets or new community projects.
- 3.2.3.** The ECWRPC and the Bay-Lake Regional Planning Commission (BLRPC) should meet periodically to discuss large regional planning issues and to share and align priorities for updating regional economic development planning efforts.
- 3.2.4.** Municipalities, the ECWRPC, and the BLRPC should work together to eliminate inconsistencies and improve efficiency in the local development review processes among communities within the corridor.
- Having greater regional uniformity and efficiency in the development review processes would make the I-41 Corridor more attractive to new investment and would help to spread that investment more evenly among the communities.

3.3. Launch an internal marketing campaign designed to reinforce the collective approach for the region and create a sense of regional identity within the corridor.

3.3.1. Develop a permanent I-41 Corridor logo.

3.3.2. Establish a permanent Web presence.

- In the short term, update the current www.I41corridor.com Web presence.
- In the midterm, consider outsourcing a crowdsourcing Web service, such as Chaordix (<https://www.chaordix.com>), which specializes in building and engaging online communities to yield insights, ideas, and innovation. (See #LoveYYC, as a best-practice example.)
- Consider conducting an online contest to engage regional residents and harness their creative energy to tell Northeast Wisconsin's story and generate ideas to promote the region.

3.3.3. Set up social media accounts and create a calendar of planned posts.

- Utilize the regional partners' social media platforms to educate the community about positive findings and lesser-known facts uncovered throughout the strategic planning process.
- Develop a more consistent and strategic economic development voice across social media platforms, in particular LinkedIn and Twitter, to develop a greater awareness of economic development activities in the corridor.
- Solicit active social media users (individuals and organizations) to serve as ambassadors for the region. Develop a "social media tips sheet" to guide users on what to post.
- Develop a social media calendar that allows each organization to proactively plan content based on specific topics or focused on community events.
- Develop an external hashtag campaign, such as #WhyNEW, or an internal hashtag campaign, such as #ILoveNEW, and encourage residents and ambassadors to tell positive stories about Northeast Wisconsin and the I-41 Corridor.
- Celebrate community successes via social media.
- Highlight when communities are included in various national rankings.

3.3.4. Publish an I-41 Corridor e-newsletter that showcases partnership achievements, meetings, new projects, and community events.

3.3.5. Encourage partner organizations to devote a portion of their existing newsletters or events to I-41 Corridor regional initiatives.

CALGARY ECONOMIC DEVELOPMENT

#LoveYYC is an internal marketing and crowdsourcing initiative created by Calgary Economic Development to bring together Calgarians, from all different backgrounds, who share a common passion for living and working in their city. It was developed as a place to share thoughts and ideas, ask questions, help solve challenges, and help advance Calgary's economy. The initiative was launched with the understanding that innovation is a group process and that a region's residents are an integral part of driving toward the best idea. This community is open 24/7 to share thoughts, experiences, and ideas. On a regular basis, economic development officials invite the public to participate in contests, poll questions, and discussions. The most recent contest was an elevator pitch competition to bring Amazon's HQ2 to Calgary.

For more information, visit
<https://loveyyyc.chaordix.com/dashboard>

3.3.6. Unify internal and external messaging among partner organizations.

- Ensure all regional partners are sending the same message regarding the economic vision and goals.
- Create talking points to share with partner organizations that touch on key messages.
- Consider asking partner organizations to include the I-41 Corridor logo on all marketing and communications materials. Create a graphic standards manual to guide proper usage and placement of the logo.

3.3.7. Highlight regional success stories and events among local audiences.

- During local events and through communications materials, stakeholders should raise awareness of economic development successes and initiatives in other communities along the corridor.

3.4. Fully leverage Microsoft's investments in the region to influence internal and external perceptions of the I-41 Corridor.

In 2017, Microsoft emerged as a significant investor and stakeholder in the economic development of Northeast Wisconsin. The company announced its support for three important initiatives that will enhance technology-focused entrepreneurship and education in the region. These initiatives include the following.

- **TechSpark** is a national civic program that will provide broadband access to rural areas, teach young people about digital skills and careers, and inspire entrepreneurship. Appleton will serve as home to one of five pilot TechSpark initiatives in the US.
- **Titletown Tech** is a partnership between Microsoft and the Green Bay Packers and will be based in Titletown District in Ashwaubenon near Lambeau Field. Titletown Tech will result in three new initiatives: a Titletown tech accelerator, a venture capital fund, and new lab space.
- **gBETA** is a free business accelerator available to startups and emerging firms in Northeast Wisconsin. It provides access to business coaching and mentoring, office space, networking, and deals/perks from vendors. gBETA partners include Microsoft, gener8tor, UW Oshkosh, Fox Valley Technical College, WiSys, UW-Green Bay, and Greater Oshkosh EDC.

Microsoft's presence and interest in the I-41 Corridor offers a unique chance to not only create new opportunities for technology-led entrepreneurship and education for existing residents, but it can also help to enhance the region's internal and external image. While the region's position as one of the nation's great manufacturing centers will continue to influence how people and businesses view it, the presence of TechSpark, Titletown Tech, and gBETA all can help the region appeal to a broader audience. Engaging the interest of Millennials and younger, tech-savvy residents, both internal and external, is a distinct opportunity.

3.4.1. Prominently feature the Microsoft initiatives in internal and external regional marketing activities.**3.4.2.** Stakeholders should highlight Microsoft initiatives and events in their community and organizational marketing materials and events.**3.4.3.** Stakeholders should invite representatives of TechSpark, Titletown Tech, and gBETA to speak at local events to educate residents about their respective initiatives and successes.

GOAL 3 IMPLEMENTATION MATRIX

	POTENTIAL PARTNERS	TIMEFRAME			
		Ongoing	Next 12 mos.	1 to 3 years	3 to 5 years
GOAL 3: FOSTER A STRONGER COLLABORATION ECOSYSTEM.					
Strategy 3.1. Advocate more forcefully and collaboratively around key infrastructure issues.	NEWCC, LGs, EDOs, ECWRPC, BLRPC, ON		◆		
Strategy 3.2. Establish new opportunities for regional stakeholders to connect and work together on important regional economic development issues.	NEWREP, NNInc, EDOs, ECWRPC, BLRPC, CCs, LGs, ON			◆	
Strategy 3.3. Launch an internal marketing campaign designed to reinforce the collective approach for the region and create a sense of regional identity within the corridor.	CCs, CVBs, EDOs, NNInc			◆	
Strategy 3.4. Fully leverage Microsoft's investments in the region to influence internal and external perceptions of the I-41 Corridor.	CCs, EDOs, NNInc, NEWITA		◆		

APPENDIX 1. I-41 CORRIDOR RESOURCE MATRIX

The matrix beginning on the next page includes a list of the stakeholder organizations in the five counties that have a connection or role to play in economic development. The matrix was developed in partnership with ECWRPC and Envision Greater Fond du Lac as part of the process to establish the Regional Entrepreneurial Development System (REDS). The organizations are grouped at the county and the regional levels.

Please note that some organizations represent more than one county and are therefore listed multiple times. The specific functions are organized into three categories: core economic development, talent, and entrepreneurship and small business development. A solid red box indicates the organization has a primary role in supporting a function; a hollow gray box indicates a secondary role.

The resource matrix is a first attempt to capture all the organizations in the I-41 Corridor and roles they play. Some organizations in the region might not be listed and some roles might be mischaracterized. Therefore, an ongoing verification and maintenance effort will be required to keep the matrix accurate and updated.

The key finding from the matrix is that there are no glaring functional gaps in the corridor. There is an abundance of organizations in each county and at the regional level addressing the corridor's main economic development needs.

■ Primary Role ■ Secondary Role

Resource Provider	Core Econ. Dev. Functions								Talent						Entrepreneurship & Small Business Support																							
	Traditional Functions								Training & Education Assistance						Funding Assist.	Facilities Assist.	Business Consulting Assistance					Marketing Assistance	Research Assistance	Other Assistance														
	Target Industry Recruitment	Business Retention & Expansion	Economic Development Marketing	Relocation & Expansion Incentives	Site Selection	Policy & Advocacy	Data Collection & Publication	Real Estate & Site Development	International Outreach	Entrepreneurial Ed./Academic Degree Progs.	Talent Marketing & Recruitment	Labor/Workforce Training	Youth Programs	Leadership/Management-Related Training	Labor Recruitment/Internships	Funding Grants	Accelerator/Incubator/Lab Space	Meeting Space	Business & Business Plan Consultation	Business Plan Writing Services	Management & HR Advice	Financial Projections & Advice	Lean Startup & BMC Consultation	Import/Export Assistance	Business Coaching/Mentoring	Marketing Advice	Networking Opportunities	Presentation & Pitch Rehearsals/Assistance	Market/Competitive/Industry Analysis	Primary Research & Survey	Product Assessment/Feasibility Studies	Business Plan Competitions	Business Clubs & Other	Bilingual Connections				
Brown County																																						
Advance Business & Manufacturing Center	■										■		■			■		■	■	■					■		■							■				
Ashwaubenon Business Development	■	■		■												■																						
Bay-Lake Regional Planning Commission					■		■		■		■													■						■								
Bay Area Workforce Development Board	■				■						■	■			■												■			■		■						
Bellin College									■									■																				
City of De Pere Economic Development			■	■	■											■														■								
Cooperative Educational Services Agency (CESA 7)													■	■																								
De Pere Area Chamber of Commerce		■	■	■			■				■	■	■	■		■			■										■						■			
Downtown Green Bay Inc.			■		■		■	■			■			■				■	■	■						■	■	■										
Forum for Innovation (FINN)		■	■						■	■	■		■						■							■	■	■	■							■		
Greater Green Bay Chamber		■	■		■	■	■	■	■	■	■	■	■	■	■	■				■					■	■	■								■	■		
Kinnektor									■							■		■	■	■	■		■	■	■	■	■	■	■					■	■			
Main Street De Pere Inc. (Definitely De Pere)		■	■		■				■							■	■		■	■		■			■	■	■				■	■						
New North, Inc.	■	■	■		■		■	■	■	■	■				■			■									■	■	■		■	■						
N.E.W. Venture Foundry																			■		■	■	■		■	■	■	■						■	■			
NEW Manufacturing Alliance									■		■	■			■					■				■				■										
Northeast Wisconsin Technical College									■		■	■	■	■	■				■		■						■								■			

Resource Provider	Core Econ. Dev. Functions								Talent						Entrepreneurship & Small Business Support																							
	Traditional Functions								Training & Education Assistance						Funding Assist.	Facilities Assist.	Business Consulting Assistance					Marketing Assistance	Research Assistance	Other Assistance														
	Target Industry Recruitment	Business Retention & Expansion	Economic Development Marketing	Relocation & Expansion Incentives	Site Selection	Policy & Advocacy	Data Collection & Publication	Real Estate & Site Development	International Outreach	Entrepreneurial Ed./Academic Degree Progs.	Talent Marketing & Recruitment	Labor/Workforce Training	Youth Programs	Leadership/Management-Related Training	Labor Recruitment/Internships	Funding	Grants	Accelerator/Incubator/Lab Space	Meeting Space	Business & Business Plan Consultation	Business Plan Writing Services	Management & HR Advice	Financial Projections & Advice	Lean Startup & BMC Consultation	Import/Export Assistance	Business Coaching/Mentoring	Marketing Advice	Networking Opportunities	Presentation & Pitch Rehearsals/Assistance	Market/Competitive/Industry Analysis	Primary Research & Survey	Product Assessment/Feasibility Studies	Business Plan Competitions	Business Clubs & Other	Bilingual Connections			
Oneida Nation Development Division																																						
Rasmussen College																																						
Redevelopment Authority of the City of Green Bay																																						
SCORE Green Bay																																						
St. Norbert College																																						
University of Wisconsin—Green Bay																																						
UW-Green Bay Small Business Development Center																																						
Calumet County																																						
Brillion Chamber of Commerce																																						
Calumet County Community Economic Development																																						
Calumet County—UW-Extension																																						
City of Brillion Community Development																																						
City of Menasha Community Development Department																																						
Chilton Chamber of Commerce																																						
East Central Wisconsin Regional Planning Commission																																						
Fox Cities Chamber of Commerce																																						
Fox Cities Regional Partnership																																						

Resource Provider	Core Econ. Dev. Functions								Talent						Entrepreneurship & Small Business Support																						
	Traditional Functions								Training & Education Assistance						Funding Assist.		Facilities Assist.		Business Consulting Assistance					Marketing Assistance		Research Assistance		Other Assistance									
Kiel Area Association of Commerce		■	■																	■							■	■							■		
New Holstein Area Chamber of Commerce		■	■										■														■	■							■		
New Holstein Economic Development Corporation		■	■	■	■			■		■					■					■							■	■		■							
SCORE Fox Cities									■						■					■		■	■				■										
Stockbridge Area Business Association		■	■																							■		■							■		
Fond du Lac County																																					
ADVOCAP, Inc.					■									■	■	■		■	■	■	■	■				■	■							■		■	
Campbellsport Area Chamber of Commerce				■																■	■	■	■					■									
City of Waupun Economic Development							■				■	■	■			■		■	■		■					■	■	■	■								
Downtown Fond du Lac Partnership		■	■	■	■		■	■							■	■			■		■					■	■	■									
Emergent Technology Center									■									■	■										■	■							
Envision Greater Fond du Lac		■	■	■	■		■	■		■	■	■	■	■	■	■		■	■		■	■				■	■	■			■	■			■		■
Fond du Lac County—UW-Extension									■			■	■	■			■		■								■	■	■			■				■	
Fond du Lac Public Library														■				■												■					■		
Fox Valley Workforce Development Board		■					■				■			■																							
IGNITE! Business Success				■					■		■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Marian University									■										■																■		
Moraine Park Technical College									■		■		■	■					■																	■	
Ripon Area Chamber of Commerce		■	■	■																							■	■							■		

Resource Provider	Core Econ. Dev. Functions								Talent						Entrepreneurship & Small Business Support																					
	Traditional Functions								Training & Education Assistance						Funding Assist.		Facilities Assist.		Business Consulting Assistance				Marketing Assistance		Research Assistance		Other Assistance									
	Target Industry Recruitment	Business Retention & Expansion	Economic Development Marketing	Relocation & Expansion Incentives	Site Selection	Policy & Advocacy	Data Collection & Publication	Real Estate & Site Development	International Outreach	Entrepreneurial Ed./Academic Degree Progs.	Talent Marketing & Recruitment	Labor/Workforce Training	Youth Programs	Leadership/Management-Related Training	Labor Recruitment/Internships	Funding	Grants	Accelerator/Incubator/Lab Space	Meeting Space	Business & Business Plan Consultation	Business Plan Writing Services	Management & HR Advice	Financial Projections & Advice	Lean Startup & BMC Consultation	Import/Export Assistance	Business Coaching/Mentoring	Marketing Advice	Networking Opportunities	Presentation & Pitch Rehearsals/Assistance	Market/Competitive/Industry Analysis	Primary Research & Survey	Product Assessment/Feasibility Studies	Business Plan Competitions	Business Clubs & Other	Bilingual Connections	
Ripon College									■		■	■	■	■						■	■		■				■	■							■	
Ripon College Creative Enterprise Consultants									■						■					■	■		■				■			■	■	■				■
Ripon Main Street		■	■	■	■			■								■				■															■	
SCORE Fox Cities									■							■				■		■	■			■										
University of Wisconsin-Fond du Lac									■			■								■								■								■
Waupun Area Chamber of Commerce		■	■																									■								■
Outagamie County																																				
Appleton Downtown Inc.		■	■	■	■			■								■	■		■									■								
Appleton Public Library												■	■		■				■												■				■	
City of Appleton					■										■	■	■											■								
City of Appleton Community and Economic Development		■	■		■			■								■	■											■								
City of New London		■	■	■	■				■							■	■			■			■													
Fox Cities Chamber of Commerce		■	■			■			■			■																■								■
Fox Cities Regional Partnership	■	■	■	■	■			■	■	■	■	■	■	■	■	■	■			■		■		■		■	■	■			■					
Fox Valley Technical College									■		■		■				■		■	■	■		■	■	■	■	■	■	■	■	■	■				■
Fox West Chamber of Commerce		■	■																									■								■
Greater Outagamie County Economic Development Corporation		■		■	■											■	■																			
Heart of the Valley Chamber of Commerce		■	■		■	■		■	■		■		■						■	■						■		■								■
New London Area Chamber of Commerce		■	■		■			■			■					■			■									■								■

Resource Provider	Core Econ. Dev. Functions								Talent						Entrepreneurship & Small Business Support																							
	Traditional Functions								Training & Education Assistance						Funding Assist.		Facilities Assist.		Business Consulting Assistance				Marketing Assistance		Research Assistance		Other Assistance											
	Target Industry Recruitment	Business Retention & Expansion	Economic Development Marketing	Relocation & Expansion Incentives	Site Selection	Policy & Advocacy	Data Collection & Publication	Real Estate & Site Development	International Outreach	Entrepreneurial Ed./Academic Degree Progs.	Talent Marketing & Recruitment	Labor/Workforce Training	Youth Programs	Leadership/Management-Related Training	Labor Recruitment/Internships	Funding	Grants	Accelerator/Incubator/Lab Space	Meeting Space	Business & Business Plan Consultation	Business Plan Writing Services	Management & HR Advice	Financial Projections & Advice	Lean Startup & BMC Consultation	Import/Export Assistance	Business Coaching/Mentoring	Marketing Advice	Networking Opportunities	Presentation & Pitch Rehearsals/Assistance	Market/Competitive/Industry Analysis	Primary Research & Survey	Product Assessment/Feasibility Studies	Business Plan Competitions	Business Clubs & Other	Bilingual Connections			
Northeast Wisconsin Educational Resource Alliance (NEW ERA)									■		■	■	■	■							■							■		■								
SCORE Fox Cities									■							■				■		■	■			■					■							
Venture Center at Fox Valley Technical College									■		■		■				■		■	■	■	■	■	■	■	■	■	■	■	■	■		■			■		
Winnebago County																																						
ADVOCAP, Inc.															■	■	■		■	■	■	■	■			■	■							■		■		
Algoma Area Chamber of Commerce		■	■						■		■	■			■				■								■		■						■			
Alta Resources, Center for Entrepreneurship and Innovation (UW Oshkosh)												■	■					■	■	■		■				■		■					■	■				
Angels on the Water									■							■										■												
Chamco Inc.	■	■	■	■	■			■								■				■																		
City of Menasha Community Development Department				■	■			■																							■							
City of Neenah, Community Development		■	■		■		■							■				■													■							
City of Omro		■	■		■											■																						
Cooperative Educational Services Agency (CESA 7)													■	■																								
Fox Cities Chamber of Commerce		■	■			■			■			■																	■							■		
Fox Cities Regional Partnership	■	■	■	■	■			■	■	■	■		■	■	■	■	■			■		■				■	■	■			■							
gBETA											■		■			■		■	■	■		■	■	■		■	■	■	■	■	■	■	■	■	■			
Greater Oshkosh Economic Development Corporation	■	■	■	■	■		■	■		■		■				■	■		■	■					■	■	■											

Resource Provider	Core Econ. Dev. Functions								Talent					Entrepreneurship & Small Business Support																								
	Traditional Functions								Training & Education Assistance					Funding Assist.		Facilities Assist.		Business Consulting Assistance					Marketing Assistance		Research Assistance		Other Assistance											
	Target Industry Recruitment	Business Retention & Expansion	Economic Development Marketing	Relocation & Expansion Incentives	Site Selection	Policy & Advocacy	Data Collection & Publication	Real Estate & Site Development	International Outreach	Entrepreneurial Ed./Academic Degree Progs.	Talent Marketing & Recruitment	Labor/Workforce Training	Youth Programs	Leadership/Management-Related Training	Labor Recruitment/Internships	Funding	Grants	Accelerator/Incubator/Lab Space	Meeting Space	Business & Business Plan Consultation	Business Plan Writing Services	Management & HR Advice	Financial Projections & Advice	Lean Startup & BMC Consultation	Import/Export Assistance	Business Coaching/Mentoring	Marketing Advice	Networking Opportunities	Presentation & Pitch Rehearsals/Assistance	Market/Competitive/Industry Analysis	Primary Research & Survey	Product Assessment/Feasibility Studies	Business Plan Competitions	Business Clubs & Other	Bilingual Connections			
Junior Achievement									■				■																									
Omro Carter Memorial Library											■	■	■		■				■											■					■			
Oshkosh Chamber of Commerce		■	■	■	■	■	■	■	■		■	■	■	■	■					■								■								■		
Oshkosh Public Library													■						■												■					■		
SCORE Fox Cities									■							■				■		■	■			■												
Small Business Development Center (UW Oshkosh)					■				■		■	■	■	■		■				■		■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	
University of Wisconsin–Fox Valley									■				■							■								■								■		
University of Wisconsin Oshkosh									■			■								■								■								■		
UW Oshkosh Business Success Center									■					■	■					■	■	■	■	■		■	■	■	■	■	■	■	■	■				
Winnebago Seed Fund																■										■												
Wisconsin Family Business Forum		■							■																			■									■	
Regional																																						
Angels on the Water					■		■		■			■				■										■												
Bay-Lake Regional Planning Commission					■		■		■		■														■						■							
Bay Area Workforce Development Board		■			■						■	■			■													■			■		■					
East Central Wisconsin Regional Planning Commission					■		■				■		■	■	■		■									■	■				■	■						
Fox Valley Workforce Development Board		■					■				■				■																							
Kinnektor									■							■		■	■	■	■	■	■	■		■	■	■	■						■	■		
NEW Capital Fund																■																						

Resource Provider	Core Econ. Dev. Functions								Talent		Entrepreneurship & Small Business Support																									
	Traditional Functions								Training & Education Assistance				Funding Assist.	Facilities Assist.		Business Consulting Assistance					Marketing Assistance		Research Assistance		Other Assistance											
	Target Industry Recruitment	Business Retention & Expansion	Economic Development Marketing	Relocation & Expansion Incentives	Site Selection	Policy & Advocacy	Data Collection & Publication	Real Estate & Site Development	International Outreach	Entrepreneurial Ed./Academic Degree Progs.	Talent Marketing & Recruitment	Labor/Workforce Training	Youth Programs	Leadership/Management-Related Training	Labor Recruitment/Internships	Funding	Grants	Accelerator/Incubator/Lab Space	Meeting Space	Business & Business Plan Consultation	Business Plan Writing Services	Management & HR Advice	Financial Projections & Advice	Lean Startup & BMC Consultation	Import/Export Assistance	Business Coaching/Mentoring	Marketing Advice	Networking Opportunities	Presentation & Pitch Rehearsals/Assistance	Market/Competitive/Industry Analysis	Primary Research & Survey	Product Assessment/Feasibility Studies	Business Plan Competitions	Business Clubs & Other	Bilingual Connections	
New North, Inc.	■	■	■		■		■	■	■	■	■			■	■				■								■	■		■	■					
New Venture Foundry																				■		■	■	■		■	■	■					■	■		
Northeast Wisconsin Educational Resource Alliance (NEW ERA)										■		■	■	■	■							■						■			■					
Northeast Wisconsin Chambers Coalition (NEWCC)						■																														
NEW Manufacturing Alliance												■	■		■							■			■			■								
Northeast Wisconsin Regional Economic Partnership (NEWREP)					■	■				■	■			■	■				■								■	■		■	■					
Wisconsin Technology Council		■				■				■	■	■	■							■		■	■	■	■	■	■	■	■						■	

APPENDIX 2. CLUSTER AND TARGET INDUSTRY VALIDATION

INTRODUCTION

The purpose of this analysis is to review the region's existing targets to highlight common strengths and create a harmonized list of sectors for the I-41 Corridor. In addition to validating and consolidating the region's targets, this analysis also seeks to identify specific niches within each broad cluster. These detailed industries are presented at the six-digit level using the North American Industry Classification System (NAICS).

TIP approached the analysis by examining existing targets for the EDOs responsible for target marketing and business recruitment for the largest urban areas in the corridor. The EDOs included in the analysis are as follows.

- Envision Greater Fond Du Lac
- Fox Cities Regional Partnership
- Greater Green Bay Chamber
- Greater Oshkosh Economic Development Corporation and Oshkosh Chamber of Commerce
- New North, Inc.



Each EDO in the region has a different set of target industries on which they focus. While there is some overlap, there are also targets unique to each organization. Not surprisingly, there is a heavy emphasis among the EDOs on targeting and supporting manufacturing industries.

The target sectors for each EDO—as indicated on the organization's website or in recent strategic planning documents—are summarized in the following section.

ENVISION GREATER FOND DU LAC

The diverse array of target clusters for Fond du Lac includes heavy machinery, equipment, and engine manufacturing; metalworking; printing services; business and insurance services, education and knowledge creation; transportation and distribution; and agricultural production.

- Production Technology & Heavy Machinery
 - Agricultural Equipment
 - Commercial Service Machinery
 - Industrial Machinery
- Metalworking Technology
 - Machine Tools & Accessories
 - Fasteners
 - Metal Processing
 - Metalworking Machinery
- Printing Services
- Food Processing
- Education & Knowledge Creation
- Engine Manufacturing
- Motor Vehicle Electronics
- Transportation & Distribution
- Business & Insurance Services
- Health Services
- Agricultural Production

FOX CITIES REGIONAL PARTNERSHIP

The Fox Cities targets are organized into four broad clusters: advanced manufacturing, business services, food and beverage processing, and heavy transport manufacturing.

- Advanced Manufacturing
 - Packaging
 - Paper
 - Electronics
 - Specialty Machines
- Business Services
 - Insurance
 - Finance
 - Engineering
 - Architectural
- Food & Beverage Processing
 - Dairy/Cheese
 - Grains
 - Frozen Foods
 - Canned Foods
- Heavy Transport Manufacturing
 - Heavy Trucks
 - Aerospace
 - Military
 - Emergency

GREATER GREEN BAY CHAMBER

The Green Bay targets were identified in the organization's 2017 economic development strategic plan. The broad clusters include advanced manufacturing, corporate headquarters, logistics and distribution, healthcare and medical technology, digital media and entertainment, and financial services.

- Advanced Manufacturing
 - Paper Products
 - Food Processing
 - Industrial Machinery
 - Industrial Design
- Corporate Headquarters
 - National, Regional, & Divisional
 - Corporate Supply Chain
- Digital Media & Entertainment
 - Digital Media
 - Sports & Sports Technology
- Financial Services
 - Bank HQs
 - Regional Banks & Credit Unions
 - Insurance Services
- Logistics & Distribution
 - Trucks
 - Water
- Healthcare & Medical Technology
 - Medical Specialties
 - Medical Training
 - Sports Medicine
 - Health Software & IT
 - Logistics Consulting Services

GREATER OSHKOSH ECONOMIC DEVELOPMENT CORPORATION AND OSHKOSH CHAMBER OF COMMERCE

The EDOs leading Oshkosh's cluster recruitment and development efforts are primarily focused on three sectors.

- Aviation
- Information Technology
- Manufacturing

NEW NORTH, INC.

New North is responsible for industry recruitment and marketing efforts for an 18-county region in Northeast Wisconsin, including the five counties of the I-41 Corridor. In addition to traditional recruitment activities, New North has developed online Supply Chain Marketplace directories for each of the regional target clusters. These directories help connect buyers with Northeast Wisconsin suppliers.

- Aviation & Aerospace
- Automotive
- Data Centers
- Defense Industry
- Energy Systems
- Food & Beverage
- Forest Products, Packaging, Lumber
- Foxconn
- Marine Manufacturing
- Water Industry
- Wind Power

To help illustrate commonalities across organizations, the list of regional targets was used to create a word cloud. In this type of graphic, shown in Figure 3, font size is used to show frequency. The larger the word, the more often it occurs in the stated targets of the region's EDOs. This visualization highlights some common themes, with words like "food," "technology," and "healthcare" featuring prominently.

While this technique can help illuminate shared interests, it has a number of limitations. The largest of these is the tendency to underemphasize or overemphasize a target's importance, because some words in the graphic are synonymous with others or would normally fall under a broader category. For example, "cheese" and "beverage" are specific sub-niches within "food" (the most common word in the graphic). In addition, "military" and "defense" reference the same sector.

FIGURE 3. TARGET SECTOR WORD CLOUD



Building on the themes highlighted in Figure 3, the list of targets was categorized under several broad categories that are common across the regional EDOs: manufacturing, professional services, aviation and aerospace, logistics, and food and beverage. Targets that were not easily classified or do not overlap multiple organizations (for example, wind power or agricultural production) were included as uncategorized. The results of this step are summarized by category and organization in Figure 4.

FIGURE 4. REGIONAL EDO TARGET OVERVIEW

	Envision Greater Fond Du Lac	Greater Oshkosh EDC	Fox Cities Partnership	Greater Green Bay Chamber	New North, Inc
Manufacturing	Engine Manufacturing	Manufacturing	Advanced Manufacturing	Advanced Manufacturing	Automotive
	Metalworking Tech		Heavy Transport Manufacturing		Forest Products, Packaging, Lumber
	Motor Vehicle Electronics				Foxconn
	Production Tech. & Heavy Machinery				Marine Manufacturing
Professional Services	Business & Insurance Services	Information Technology	Business Services	Corporate Headquarters	Data Centers
	Edu. & Knowledge Creation			Financial Services	
	Health Services			Healthcare & Medical Tech.	
	Printing Services			Digital Media & Entertainment	
Aviation & Aerospace		Aviation			Aviation & Aerospace
Logistics	Transportation & Distribution			Logistics & Distribution	
Food & Beverage	Food Processing		Food & Beverage Processing		Food & Beverage
Uncategorized	Agricultural Production				Energy Systems
					Defense Industry
					Water Industry
					Wind Power

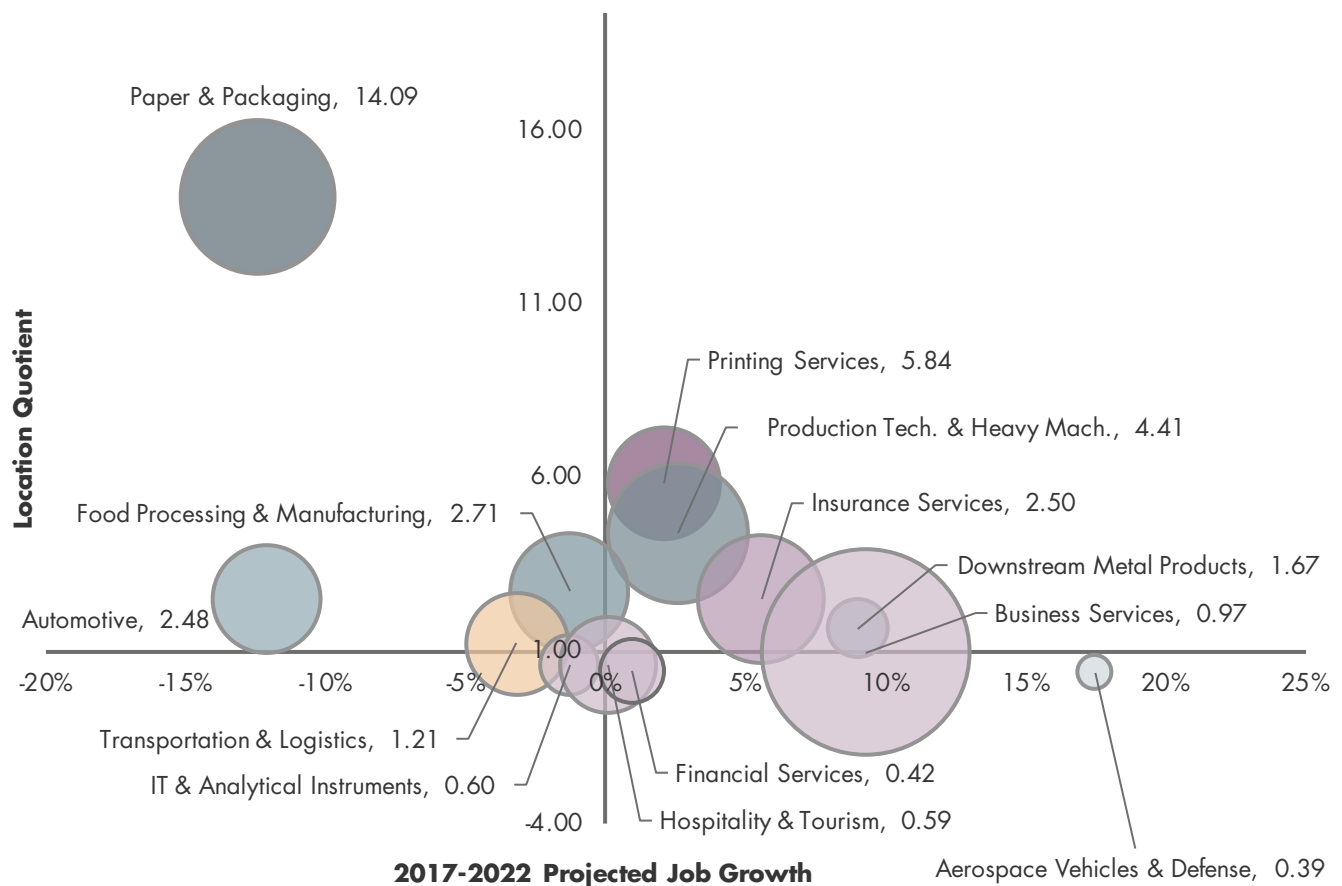
Source: TIP Strategies based on review of targets identified by I-41 Corridor EDOs.

The identified categories were then quantified using employment data at the six-digit NAICS level, grouped according to the cluster definitions created by the Harvard Business School's US Cluster Mapping project.² Figure 5 shows the strengths of each existing cluster using a bubble chart. The larger the bubble, the greater the number of workers employed in that cluster in the region. The X axis in the graph indicates the projected job growth for each cluster from 2017 to 2022. The Y axis measures the region's employment concentration in the cluster relative to the US using a location quotient (LQ); a higher LQ suggests a relative advantage. For example, for every one (1.00) paper and packaging job in the nation, there are 14.09 in the I-41 Corridor.

However, while paper and packaging registers by far the largest LQ among the region's clusters, according to Emsi projections, it is expected to suffer a 12 percent loss in employment over the next 5 years. Other significant clusters in which job losses are anticipated include food processing and manufacturing, automotive, and transportation and logistics.

The optimum point for the graph is the top right quadrant. Bubbles located in that quadrant have both higher-than-average employment concentration and are projected to experience job growth. For the I-41 Corridor, these clusters include printing services, production technology and heavy machinery, downstream metal products, insurance services, and business services.

FIGURE 5. EMPLOYMENT CONCENTRATION AND PROJECTED GROWTH OF CLUSTERS
















Source: Emsi Complete Employment—2017.3.

² See <http://www.clustermapping.us/>

Using findings from the analysis outlined above and insights gained from discussions with regional organizations over the course of the planning process, 13 clusters were identified for targeting. These targets, shown in Figure 6, were organized into three broad sectors: advanced manufacturing, professional services, and transportation and logistics. They are recommended for the region because they are critical industry drivers that are targeted and supported by multiple EDOs along the I-41 Corridor. They represent shared economic interests and the entire region benefits from their presence.

FIGURE 6. SUGGESTED REGIONAL TARGET CLUSTERS

Advanced Manufacturing		
 Aerospace Vehicles & Defense	 Automotive	 Food Processing & Manufacturing
 Metalworking Technology	 Paper & Packaging	 Production Technology & Heavy Machinery
Professional Services		
 Hospitality & Tourism	 Information Technology & Analytical Instruments	 Insurance Services
 Financial Services	 Printing Services	 Business Services
Transportation & Logistics		
 Transportation & Logistics		

To help EDOs in the region identify specific niches to target in their business recruitment and marketing programs, Figure 7 provides information at the detailed industry level (six-digit NAICS code) for each of the 13 targets. Figure 7 includes industries with at least 250 jobs in the I-41 Corridor and is ranked by LQ. In addition to LQs, Figure 7 includes projected job growth percentages and average earnings per job (wages, salaries, profits, benefits, and other compensation).

FIGURE 7. I-41 REGIONAL CLUSTERS

NAICS	Description	2016 LQ	2016 Jobs	2016-2021 % Change	2016 Avg. Earnings
Aerospace Vehicles & Defense					
336411	Aircraft Mfg.	0.90	582	21%	\$91,909
Automotive					
336120	Heavy Duty Truck Mfg.	36.16	2,818	-22%	\$79,379
331511	Iron Foundries	15.82	1,600	-17%	\$73,095
336211	Motor Vehicle Body Mfg.	11.89	1,938	-2%	\$87,947
336320	Motor Vehicle Electrical & Electronic Equipment Mfg.	2.66	455	23%	\$70,635
Business Services					
551111	Offices of Bank Holding Companies	7.18	260	-18%	\$93,094
561422	Telemarketing Bureaus & Other Contact Centers	2.98	4,177	7%	\$40,020
551114	Corporate, Subsidiary, & Regional Managing Offices	1.95	11,783	15%	\$113,469
541614	Process, Physical Distribution, & Logistics Consulting Services	1.93	703	31%	\$55,468
541330	Engineering Services	0.86	2,345	0%	\$92,191
541511	Custom Computer Programming Services	0.68	1,770	19%	\$92,296
518210	Data Processing, Hosting, & Related Services	0.57	492	14%	\$75,848
541690	Other Scientific & Technical Consulting Services	0.48	323	29%	\$76,413
541611	Administrative Mgmt. & General Mgmt. Consulting Services	0.32	636	17%	\$76,783
541512	Computer Systems Design Services	0.30	840	21%	\$86,502
Downstream Metal Products					
332439	Other Metal Container Mfg.	6.22	268	19%	\$58,612
332999	All Other Miscellaneous Fabricated Metal Product Mfg.	4.32	961	-3%	\$62,177
332321	Metal Window & Door Mfg.	1.95	335	32%	\$64,948
Financial Services					
522120	Savings Institutions	1.12	386	-26%	\$71,568
523120	Securities Brokerage	0.85	682	-12%	\$131,213
523930	Investment Advice	0.53	322	26%	\$69,942
523920	Portfolio Mgmt.	0.42	267	23%	\$156,890
Food Processing and Manufacturing					
311513	Cheese Mfg.	24.76	3,212	4%	\$73,022
311412	Frozen Specialty Food Mfg.	11.16	1,807	-4%	\$64,699
311421	Fruit & Vegetable Canning	6.75	1,141	-2%	\$65,314
311824	Dry Pasta, Dough, & Flour Mixes Mfg. from Purchased Flour	5.84	378	1%	\$44,984
311119	Other Animal Food Mfg.	5.41	517	-11%	\$70,641
311821	Cookie & Cracker Mfg.	3.11	303	-11%	\$37,113

NAICS	Description	2016 LQ	2016 Jobs	2016-2021 % Change	2016 Avg. Earnings
Hospitality and Tourism					
711211	Sports Teams & Clubs	4.27	1,145	23%	\$204,937
713990	All Other Amusement & Recreation Industries	0.82	483	9%	\$23,220
721110	Hotels (except Casino Hotels) & Motels	0.61	2,726	-12%	\$21,212
Information Technology and Analytical Instruments					
334418	Printed Circuit Assembly (Electronic Assembly) Mfg.	10.11	1,588	-8%	\$50,242
Insurance Services					
524114	Direct Health & Medical Insurance Carriers	4.48	4,565	11%	\$82,289
524113	Direct Life Insurance Carriers	2.85	1,972	-7%	\$59,698
524126	Direct Property & Casualty Insurance Carriers	1.87	2,584	5%	\$75,764
Local Health Services					
621991	Blood & Organ Banks	3.23	650	26%	\$43,558
623312	Assisted Living Facilities for the Elderly	2.25	2,684	22%	\$27,424
621330	Offices of Mental Health Practitioners (except Physicians)	2.12	687	30%	\$29,332
339116	Dental Laboratories	2.10	301	-6%	\$49,943
623210	Residential Intellectual & Developmental Disability Facilities	1.65	1,859	29%	\$25,554
621310	Offices of Chiropractors	1.44	626	6%	\$38,086
621511	Medical Laboratories	1.19	678	47%	\$72,255
622110	General Medical & Surgical Hospitals	1.13	14,597	0%	\$73,205
621111	Offices of Physicians (except Mental Health Specialists)	1.08	7,687	11%	\$126,537
623311	Continuing Care Retirement Communities	1.07	1,437	32%	\$29,365
621340	Offices of Physical, Occup., & Speech Therapists, & Audiologists	1.02	1,091	33%	\$39,538
621210	Offices of Dentists	1.01	2,758	6%	\$67,430
621320	Offices of Optometrists	0.94	371	13%	\$42,586
623110	Nursing Care Facilities (Skilled Nursing Facilities)	0.89	4,124	-6%	\$34,679
902622	Hospitals (State Government)	0.86	876	-4%	\$75,248
622210	Psychiatric & Substance Abuse Hospitals	0.78	251	4%	\$56,283
446110	Pharmacies & Drug Stores	0.76	1,559	4%	\$41,789
621493	Freestanding Ambulatory Surgical & Emergency Centers	0.64	265	28%	\$85,907
623220	Residential Mental Health & Substance Abuse Facilities	0.50	313	0%	\$33,790
621420	Outpatient Mental Health & Substance Abuse Centers	0.40	263	38%	\$55,235
621610	Home Health Care Services	0.40	1,600	37%	\$36,731
Paper and Packaging					
322121	Paper (except Newsprint) Mills	36.11	5,908	-27%	\$85,830
322291	Sanitary Paper Product Mfg.	29.39	2,328	-2%	\$87,720
322299	All Other Converted Paper Product Mfg.	20.66	972	6%	\$65,961
322220	Paper Bag & Coated & Treated Paper Mfg.	20.18	3,354	-13%	\$79,264
322130	Paperboard Mills	5.43	469	13%	\$92,812
322211	Corrugated & Solid Fiber Box Mfg.	4.79	1,255	-1%	\$89,029
322219	Other Paperboard Container Mfg.	3.74	266	-7%	\$62,036

NAICS	Description	2016 LQ	2016 Jobs	2016-2021 % Change	2016 Avg. Earnings
Printing Services					
323111	Commercial Printing (except Screen & Books)	5.95	5,744	5%	\$61,146
323113	Commercial Screen Printing	5.37	1,205	10%	\$44,179
323120	Support Activities for Printing	5.06	377	-15%	\$57,915
323117	Books Printing	4.85	264	-50%	\$52,647
Production Technology and Heavy Machinery					
333243	Sawmill, Woodworking, & Paper Machinery Mfg.	40.57	1,587	-21%	\$86,301
333244	Printing Machinery & Equipment Mfg.	25.04	533	-4%	\$83,321
333618	Other Engine Equipment Mfg.	22.75	2,868	-1%	\$80,471
333112	Lawn & Garden Tractor & Home Lawn & Garden Equip. Mfg.	20.72	993	13%	\$55,580
333318	Other Commercial & Service Industry Machinery Mfg.	11.19	1,967	19%	\$66,940
333613	Mechanical Power Transmission Equipment Mfg.	9.54	347	5%	\$86,515
333241	Food Product Machinery Mfg.	8.33	428	18%	\$57,754
333922	Conveyor & Conveying Equipment Mfg.	6.31	547	-4%	\$74,408
333993	Packaging Machinery Mfg.	4.32	251	-4%	\$93,428
333999	All Other Misc. General Purpose Machinery Mfg.	3.97	436	18%	\$72,298
333249	Other Industrial Machinery Mfg.	2.53	395	-4%	\$68,648
333120	Construction Machinery Mfg.	1.87	346	47%	\$63,955
333111	Farm Machinery & Equipment Mfg.	1.52	251	14%	\$53,011
Transportation and Logistics					
484121	General Freight Trucking, Long-Distance, Truckload	2.50	4,332	5%	\$58,340
484230	Special. Freight (except Used Goods) Trucking, Long-Distance	2.18	855	-40%	\$68,411
482110	Rail Transportation	0.74	519	-3%	\$93,438
488510	Freight Transportation Arrangement	0.67	440	-3%	\$60,958
481111	Scheduled Passenger Air Transportation	0.33	391	-11%	\$60,124

Source: Emsi Complete Employment—2017.3.

APPENDIX 3. REGIONAL ECONOMIC ASSESSMENT

To provide a common framework for our recommendations, TIP conducted a demographic and economic assessment of the I-41 Corridor. We began by compiling data on the region, with comparisons to Wisconsin and the US where appropriate. The purpose of the assessment is to understand I-41 Corridor's relative economic position and highlight its competitive advantages and disadvantages.

KEY FINDINGS

The economic assessment revealed numerous insights into the I-41 Corridor economy. The most significant findings are highlighted below.

- **The I-41 Corridor has experienced modest population growth over the last decade.** The total population of the five counties rose by 45,000 residents from 2006 to 2016. While the region's rate of population growth (6 percent) has outpaced the state's (4 percent), it has lagged the national rate (8 percent).
- Looking forward, **the pace of population growth in the I-41 Corridor is expected to accelerate.** The State of Wisconsin's Demographic Services Center projects the region's population to reach nearly 869,000 by 2030, representing a compound annual growth rate of 0.9 percent.
- Natural increase and international immigration accounted for most of population growth in the region over the last 5 years. However, the **region experienced a net decline in domestic migration from 2013 to 2015.**
- **Current unemployment rates in each of the counties remain near the bottom of their historical ranges.** In 2016, the unemployment rate for the region stood at 3.7 percent.
- The I-41 Corridor enjoys generally **higher labor force participation rates** than the nation as a whole.
- **The I-41 Corridor is a major employment center** for all of Northeast Wisconsin, drawing in 26,000 net inbound commuters from outside the region on a daily basis. The sectors bringing in the largest number of commuters include manufacturing, healthcare, and finance and insurance.
- **The region is home to one of the nation's largest manufacturing bases.** The sector alone accounts for almost one-fifth of the region's job base and surpasses the nation's share of employment by nearly 11 percent.
- Since the end of the recession, **healthcare and manufacturing have been the dominant job-generating sectors in the corridor**, each adding over 4,500 jobs.
- The region's largest industries are mirrored in its **largest occupational groups: office and administrative support** (which contributes to a range of industries including manufacturing, corporate and regional offices, and finance and insurance) and **production** (an essential group of occupations that drive the manufacturing sector).
- **The region is home to a heavy concentration of production workers compared to the US.** Production jobs account for roughly 13 percent of all jobs in the region yet comprise only 6 percent of total employment in the US.
- **Over the next 5 years, the region is expected to have about 69,000 job openings.** More than 80 percent of these openings will be replacement jobs. Eighty-six percent of the middle-skill openings and 69 percent of high-skill openings are anticipated to result from replacement demand.

REGIONAL PROFILE

DEMOGRAPHICS



INITIATIVE 41

A NEWay of Thinking

The Wisconsin I-41 Corridor covers the five-county region along Interstate 41 between Fond du Lac and Green Bay. The region includes Brown, Calumet, Fond du Lac, Outagamie, and Winnebago Counties.

The I-41 Corridor has experienced modest population growth over the last decade (Figure 8). The five-county region was home to more than 750,000 residents in 2016. This figure represents an increase of more than 45,000 residents from 2006.

When viewed in percentage terms, as shown in Figure 9, the region's population expanded by slightly more than 6 percent during the period, outpacing the state's 4 percent increase, but falling short of the 8 percent rate experienced at the national level. Looking forward, the pace of population growth in the I-41 Corridor is expected to accelerate. Projections by the State of Wisconsin's Demographic Services Center place the region's combined population at nearly 869,000 by 2030, an increase of more than 110,000 residents. This translates to a compound annual growth rate of 0.9 percent, which exceeds the annualized rate for the 2006 to 2016 period.

FIGURE 8. POPULATION TRENDS, 2006-2016
ANNUAL ESTIMATES JULY 1 OF EACH YEAR

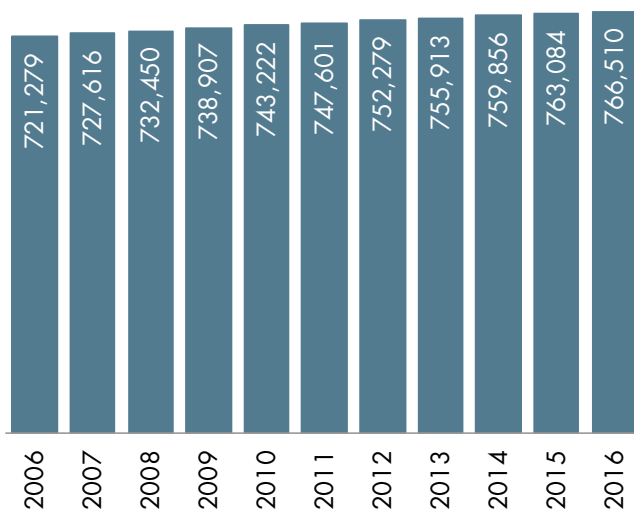
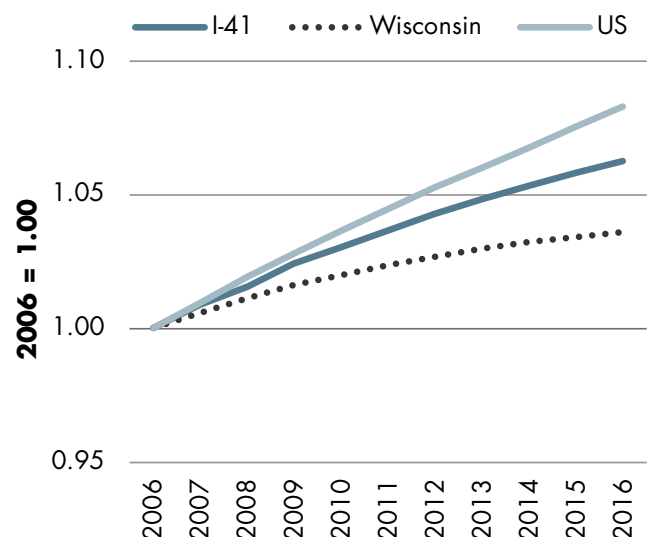


FIGURE 9. POPULATION TRENDS
GROWTH SINCE 2006

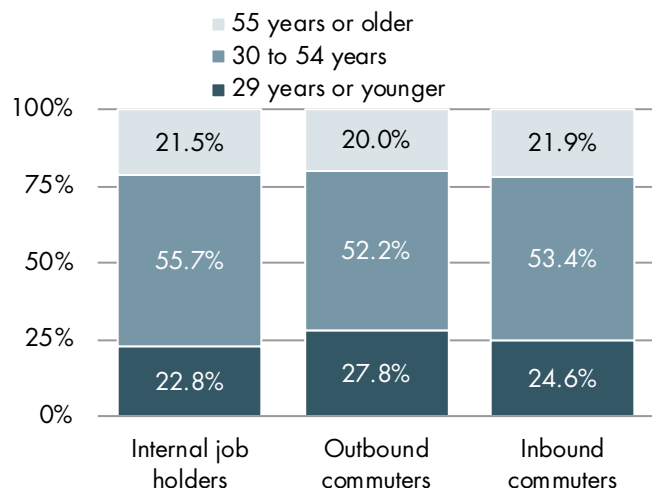


Source (both figures above): US Census Bureau, Population Estimates program Moody's Analytics.

LABOR MARKET INFORMATION

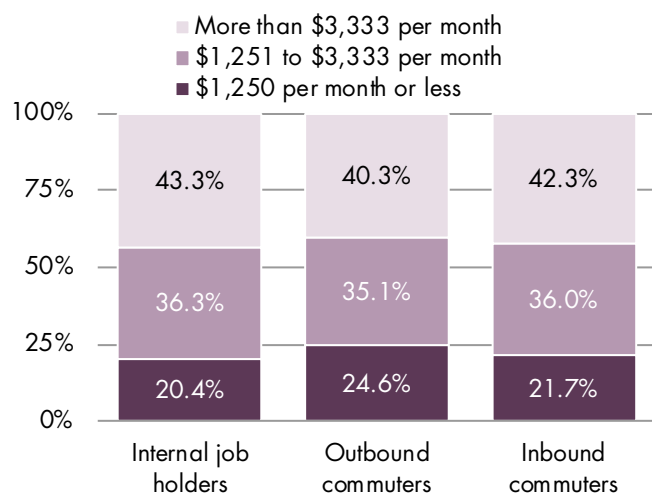
FIGURE 10. SELECTED JOBHOLDER CHARACTERISTICS, 2014

SHARE OF I-41 REGION WORKERS BY TYPE OF COMMUTING FLOW (INTERNAL, OUTBOUND, INBOUND)



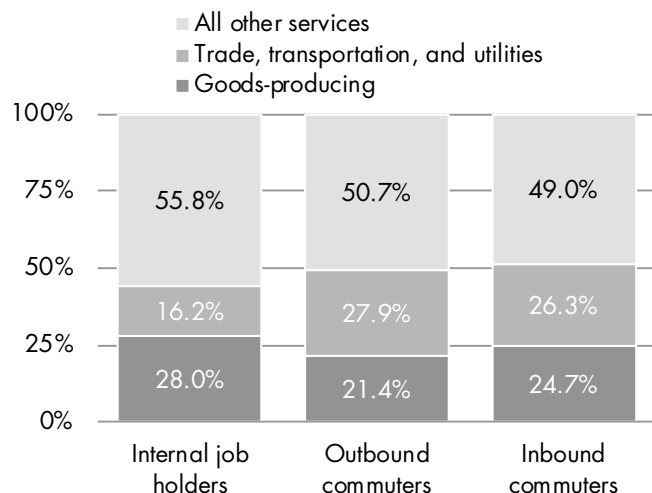
AGE

A snapshot of the age characteristics of the region's workers shows that outbound commuters are slightly younger than internal jobholders and inbound commuters. A higher percentage of workers 29 or younger (27.8 percent) are commuting to jobs outside the corridor compared to internal jobholders (22.8 percent) and inbound commuters (24.6 percent). Also, fewer workers age 55+ are outbound commuters.



EARNINGS

In addition to being younger, outbound commuters tend to earn lower wages. About 40 percent of outbound commuters earn \$3,333 or more per month, compared to 43 percent for internal jobholders and 42 percent for inbound commuters. One-quarter (24.6 percent) of outbound commuters earn \$1,250/month or less, while only 20 percent of internal jobholders and 22 percent of inbound commuters earn the same.



INDUSTRY CLASS

Internal jobholders account for a higher percentage of workers in the goods-producing sector (28 percent) than both outbound commuters (21.4 percent) and inbound commuters (24.7 percent) do. The fact that over one-quarter of internal jobholders stay in the region for goods-producing jobs reflects the ongoing importance of the manufacturing sector to the region's economic base.

Source (all figures this page): US Census Bureau, Local Employment Dynamics.

The US Bureau of Labor Statistics reported the I-41 Corridor had a total civilian labor force of just over 422,000 as of 2016. Brown and Outagamie Counties account for the largest contingents of workers in the region. Unemployment rates for the region and each of the five counties fall below both the state and national rates.

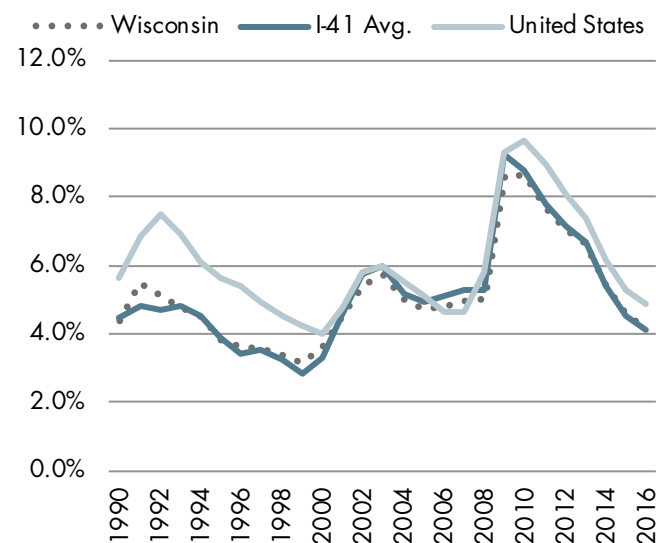
FIGURE 11. LABOR MARKET OVERVIEW, 2016

GEOGRAPHY	CIVILIAN LABOR FORCE	EMPLOYED	UNEMPLOYED	UNEMPLOYMENT RATE
United States	159,186,417	151,436,750	7,749,583	4.9%
Wisconsin	3,116,021	2,986,389	129,632	4.2%
I-41 Corridor	422,071	406,577	15,525	3.7%
Brown	140,549	135,281	5,278	3.8%
Calumet	27,936	27,014	924	3.3%
Fond du Lac	57,106	55,033	2,077	3.6%
Outagamie	103,577	99,789	3,796	3.7%
Winnebago	92,903	89,460	3,450	3.7%

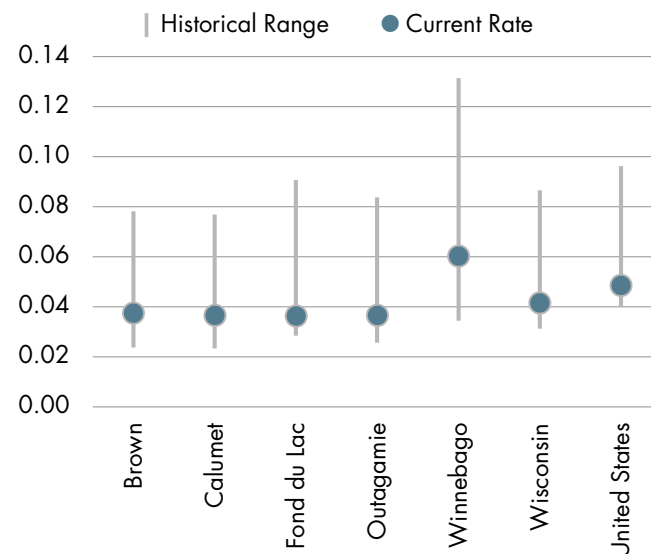
Since 1990, average annual unemployment in the region has tracked closely to the state's average. During the 1990s and since 2010, the unemployment in the region has remained below national rates. Current unemployment rates in each of the counties also remain near the bottom of their historical ranges.

FIGURE 12. AVERAGE ANNUAL UNEMPLOYMENT

PERCENT CHANGE 1990-2016



CURRENT RATES IN CONTEXT OF HISTORICAL RANGES



Sources (all figures this page): US Bureau of Labor Statistics, Local Area Unemployment Statistics (state and local), Current Population Survey (national).

As shown in Figure 13, the region’s labor force has grown by 3.7 percent over the last 10 years. The labor force expanded by about 10,000 workers between 2006 and 2009, followed by a decline and then flat growth through 2012. The labor force began rising again in 2013 and reached a high of 422,071 in 2016.

Figure 14 compares labor force participation rates for each of the region’s counties with state and national rates. Labor force participation measures the percentage of the population that is either employed or unemployed (that is, either working or actively seeking work). Except for Calumet County, all the counties register higher labor force participation rates than the US.

FIGURE 13. CIVILIAN LABOR FORCE, I-41 REGION, 2006-2016

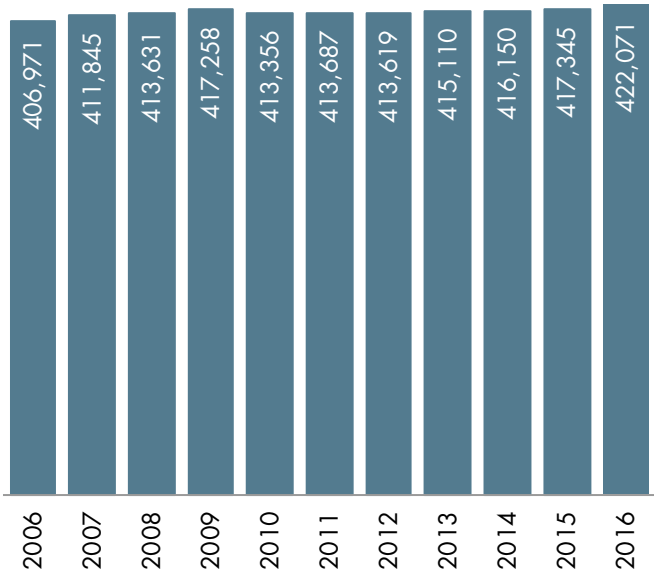
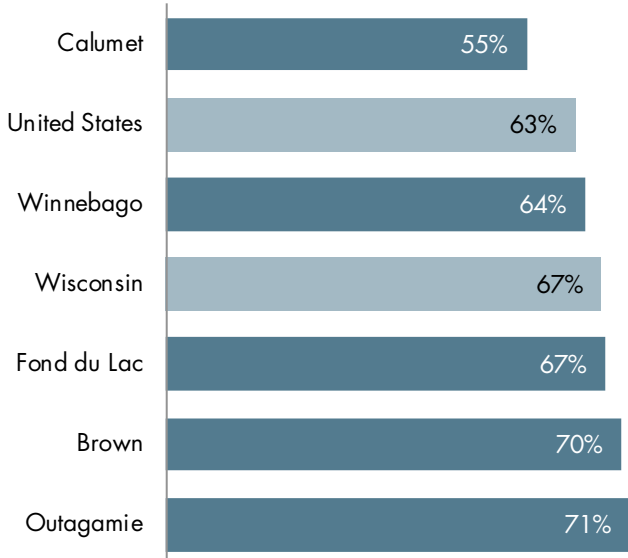


FIGURE 14. COMPARATIVE LABOR FORCE PARTICIPATION RATES, 2015

CIVILIAN LABOR FORCE, % OF TOTAL



Source (both figures): US Bureau of Labor Statistics via Moody’s Analytics.

COMMUTING PATTERNS

Data from the US Census Bureau show the I-41 Corridor is an employment center for Northeast Wisconsin. In 2014 (the most recent year available), an average of 26,491 more workers arrived for jobs in the five counties (97,568) than commuted to jobs outside the region (71,077).

FIGURE 15. INFLOW/OUTFLOW, 2014
FLOW OF WORKERS TO/FROM THE REGION



Note: Overlay arrows are for illustrative purposes and do not indicate directionality of worker flow between home and employment locations.

Moreover, the trend since 2006 indicates a growing demand for outside workers to fill jobs in the region. From 2006 to 2014, the net number of workers commuting into the region more than doubled (Figure 16). At the same time, the number of workers who reside and work in the region has also increased (Figure 17).

FIGURE 16. I-41 NET COMMUTERS, 2005-2014

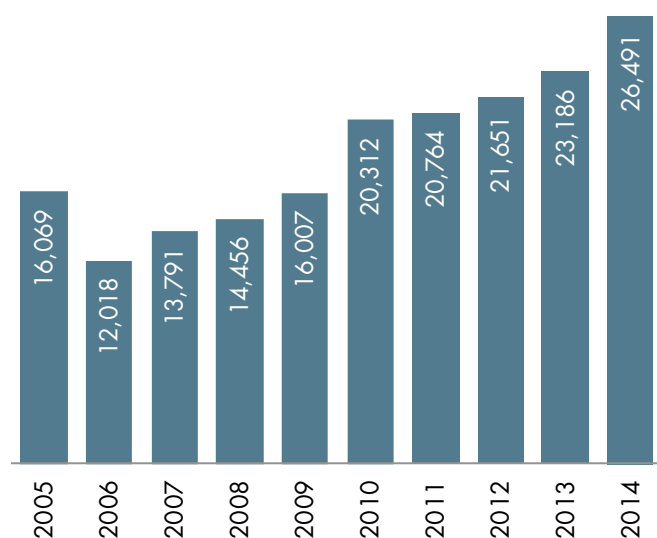
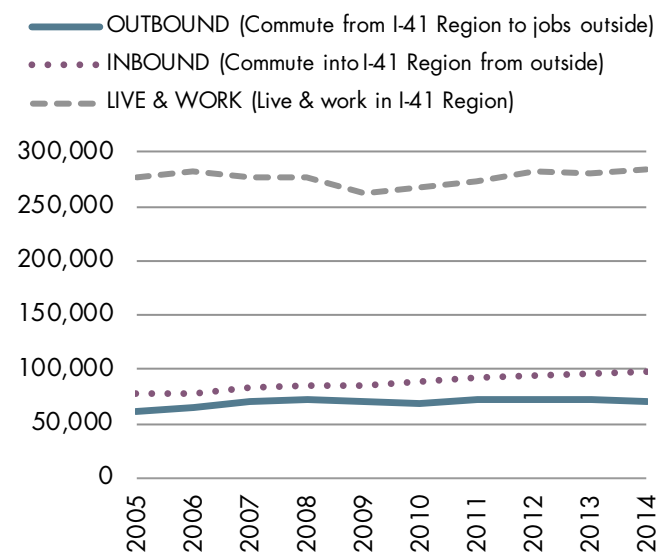


FIGURE 17. COMMUTING FLOWS, 2005-2014

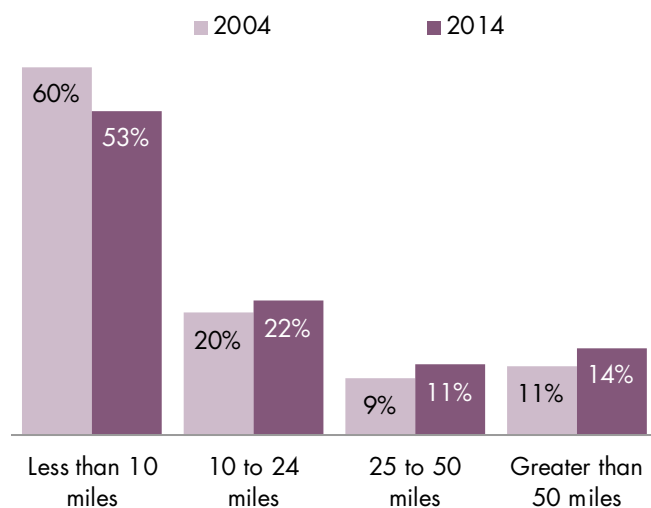


Source (all figures this page): US Census Bureau, Local Employment Dynamics.

Most people who work in the region and employed residents of the region commute fewer than 10 miles to work. However, similar to most areas in the country, a growing percentage of workers are traveling longer distances to work. The share of people working in the region traveling greater than 50 miles increased from 11 percent in 2004 to 14 percent in 2014.

FIGURE 18. DISTANCE TRAVELED, 2004 VS. 2014
SHARE OF JOB HOLDERS

PEOPLE WHO WORK IN THE I-41 REGION



WORKERS WHO LIVE IN THE I-41 REGION

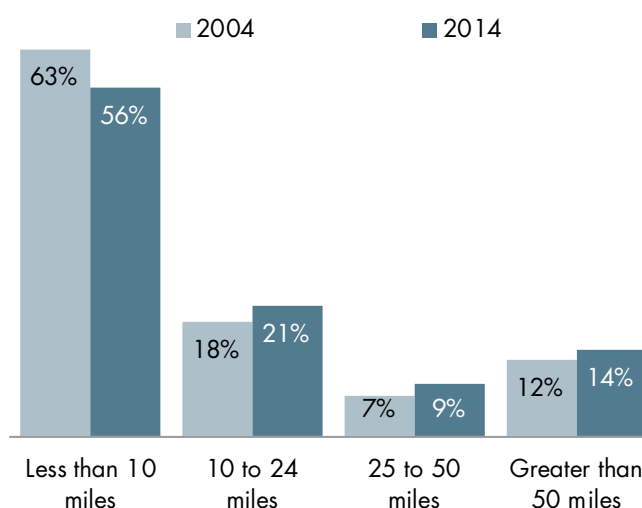


Figure 19 shows the top 10 counties where the region's workers reside and where its employed residents work, respectively. Brown County registers the highest percentages for both charts.

FIGURE 19. COMMUTING DESTINATION, 2014
TOP 10 COUNTIES

WHERE I-41 REGION WORKERS LIVE

County	Count	Share
1 Brown County, WI	96,116	25.2%
2 Outagamie County, WI	75,329	19.8%
3 Winnebago County, WI	62,207	16.3%
4 Fond du Lac County, WI	30,319	8.0%
5 Calumet County, WI	19,570	5.1%
6 Oconto County, WI	8,280	2.2%
7 Waupaca County, WI	8,027	2.1%
8 Manitowoc County, WI	7,498	2.0%
9 Milwaukee County, WI	6,112	1.6%
10 Shawano County, WI	5,429	1.4%
All Other Locations	62,222	16.3%
Total	381,109	100.0%

WHERE EMPLOYED I-41 REGION RESIDENTS WORK

County	Count	Share
1 Brown County, WI	102,227	28.8%
2 Outagamie County, WI	74,313	21.0%
3 Winnebago County, WI	67,412	19.0%
4 Fond du Lac County, WI	29,669	8.4%
5 Milwaukee County, WI	10,106	2.8%
6 Calumet County, WI	9,920	2.8%
7 Dane County, WI	7,348	2.1%
8 Waukesha County, WI	5,925	1.7%
9 Dodge County, WI	4,885	1.4%
10 Sheboygan County, WI	4,471	1.3%
All Other Locations	38,342	10.8%
Total	354,618	100.0%

Source (all figures this page): US Census Bureau, Local Employment Dynamics.

A look at cross-region commuting flows by county points to the interconnected nature of the region and the extent of its shared workforce. In Figure 20, the columns show place of residence and the rows show place of work. For example, there were 14,388 Winnebago County residents who worked in Outagamie County and 3,628 who commuted to Brown County in 2014. In addition, 23,687 Fond du Lac County residents lived and worked in the county.

The substantial movement of workers among the corridor's counties is apparent, as each county sends workers to every other county in the region. Although not explicitly tallied in the figure below, more than 86,000 workers crossed county lines within the region for employment in 2014.

FIGURE 20. COMMUTING FLOWS BY COUNTY, 2014

	LIVE IN				
	I-41 Corridor				
WORK IN	Brown	Calumet	Fond du Lac	Outagamie	Winnebago
Brown	84,828	2,030	1,147	10,594	3,628
Calumet	951	5,049	515	2,291	1,114
Fond du Lac	680	662	23,687	1,077	3,563
Outagamie	7,169	7,314	1,423	44,019	14,388
Winnebago	2,488	4,515	3,547	17,348	39,514

Source: US Census Bureau, Local Employment Dynamics.

Figure 21 compares net commuting flows by industry sector, based on the North American Industry Classification System (NAICS). In terms of commuting flow by industry, the manufacturing sector has the largest net inflow of workers on a regional basis. The sector has experienced relatively steady increases in net commuting flows over the decade, reaching a high of about 7,000 in 2014. The healthcare and social assistance sector and the finance and insurance sector have also been drawing rising levels of workers to the region since 2005.

FIGURE 21. NET COMMUTING FLOWS BY NAICS INDUSTRY SECTOR, 2005-2014
(INBOUND MINUS OUTBOUND FLOWS) BY TWO-DIGIT NAICS CODES

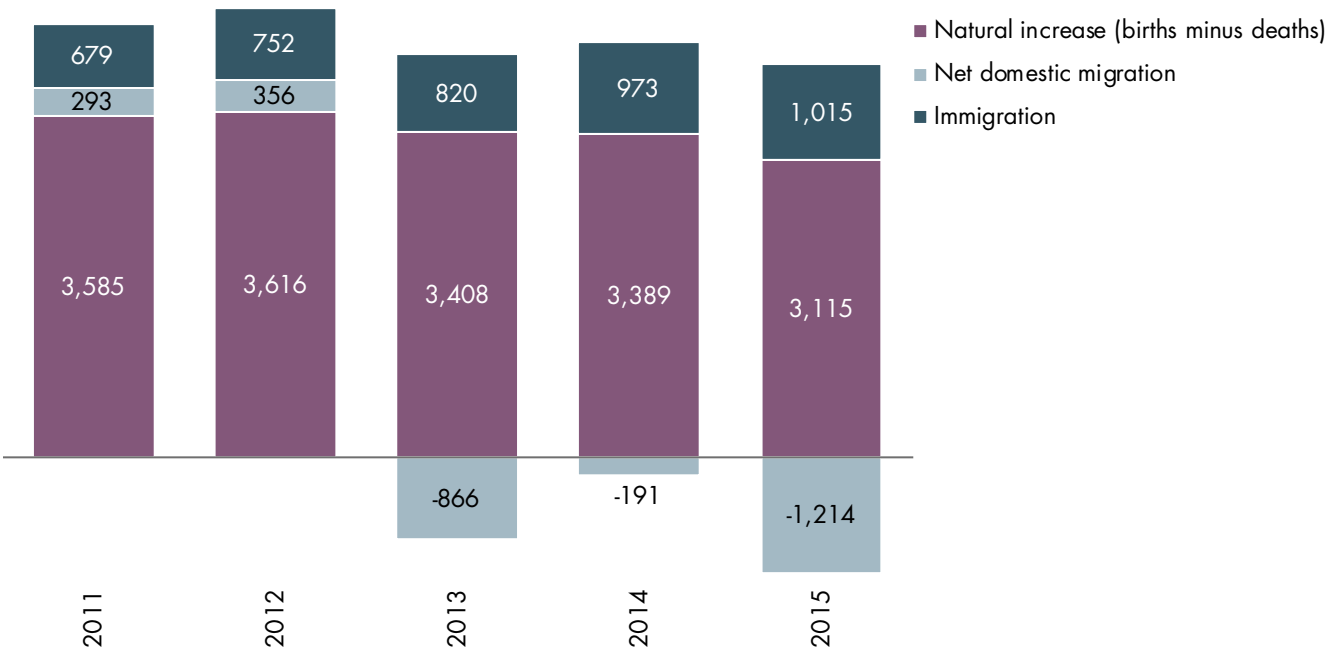
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	TREND
Manufacturing	4,764	4,782	2,909	2,760	3,757	4,540	4,675	6,505	6,760	6,988	
Health Care & Social Asst.	1,617	946	1,883	2,023	1,855	2,147	2,558	2,917	3,500	3,683	
Retail Trade	2,741	2,045	2,518	2,386	2,149	2,180	2,204	2,064	2,389	2,847	
Finance & Insurance	424	272	1,143	1,144	902	1,521	1,394	2,429	2,519	2,763	
Construction	2,318	2,163	2,431	2,453	2,231	2,521	2,101	1,946	2,022	2,024	
Wholesale Trade	697	542	673	871	1,019	1,050	1,298	1,461	1,408	1,786	
Transp. & Warehousing	1,380	1,161	1,116	1,067	1,506	1,340	1,643	1,261	1,508	1,679	
Food & Lodging	765	283	392	844	922	1,236	1,367	1,346	1,221	1,351	
Admin. & Support, Waste Mgmt. & Remediation	271	-30	242	756	570	990	990	549	774	1,088	
Educational Services	368	99	298	227	513	460	489	916	692	971	
Management of Companies & Enterprises	82	91	-93	89	-49	797	785	693	930	897	
Professional, Scientific, & Technical Services	95	-4	176	264	425	373	235	692	688	800	
Other Services (excl. Public Administration)	440	295	485	287	541	525	500	397	467	640	
Information	473	155	207	200	156	365	124	332	324	481	
Arts, Entertainment, & Recreation	-85	-87	-72	-70	-70	-105	7	-1	-53	75	
Mining, Quarrying, & Oil & Gas Extraction	115	91	92	86	69	68	36	39	18	64	
Real Estate & Rental & Leasing	106	62	63	12	-21	9	-83	-60	-137	-38	
Agriculture, Forestry, Fishing & Hunting	-120	-166	-153	-204	-160	-45	60	-197	-343	-216	
Utilities	548	520	513	495	386	-403	-518	-496	-450	-422	
Public Administration	-930	-1,202	-1,032	-1,234	-694	743	899	-1,142	-1,051	-970	

Source: US Census Bureau, Local Employment Dynamics.

MIGRATION

Estimates of the components of population change provide an indicator of the role of migration in the region. These data illustrate the share of population change from natural increase (more births than deaths) and net domestic (US) and international migration. Over the 5-year period from 2011 to 2015, natural increase and international immigration accounted for most of population growth in the region. One concerning trend was a net decline in domestic migration from 2013 to 2015. While net domestic migration can be volatile, often correlating with cyclical activities, such as job growth and housing construction, the decline might also point to the challenge the region is facing in attracting new residents.

FIGURE 22. COMPONENTS OF POPULATION CHANGE, 2011-2015



Source: US Bureau of the Census (history) via Moody's Analytics.

Figure 23 provides additional details on the I-41 Corridor migration patterns. Estimates from the American Community Survey suggest that in a given year, roughly 10 percent of residents in the region lived in a different house than the prior year. For Calumet County, this figure was slightly lower. Among those who moved, patterns in Brown and Fond du Lac Counties most closely mirrored the state and the US, with the largest share of residents moving from within the same county. Moves from another county within the same state were the next largest group. In the remaining counties (Calumet, Outagamie, and Winnebago), relocations from other Wisconsin counties accounted for the largest share of movers. Across the board, only a small share of the population moved from one state to another or from a location outside the US.

FIGURE 23. PLACE OF RESIDENCE 1 YEAR AGO
SHARE OF POPULATION AGE 1 YEAR AND OLDER



Source: 2011-2015 American Community Survey 5-Year Estimates.

INDUSTRY ANALYSIS

Figure 24 examines employment in the I-41 Corridor, Wisconsin, and the US according to different categories of industries by NAICS code. It suggests that the I-41 Corridor is home to one of the nation's largest manufacturing bases. The sector alone accounts for almost one-fifth of the region's job base and surpasses the nation's share of employment by nearly 11 percent. The region's top three industry sectors account for 41 percent of the total employment base, which is a higher concentration than both the state and the nation.

FIGURE 24. INDUSTRY DISTRIBUTION (% OF TOTAL)
COMPARISON OF I-41 REGION WITH STATE AND US

NAICS Code & Description	I-41	Wisconsin	US
31-33 Manufacturing	18.7%	15.2%	8.0%
62 Healthcare & social assistance*	12.1%	13.4%	13.4%
44-45 Retail trade	10.2%	10.3%	10.6%
72 Lodging, restaurants, & bars	7.4%	7.8%	8.6%
61 Education*	7.4%	8.4%	9.3%
23 Construction	5.7%	4.6%	5.5%
56 Administrative & support services	5.0%	5.2%	6.3%
52 Finance & insurance	5.0%	4.1%	3.9%
81 Personal & other services	4.5%	4.8%	4.9%
42 Wholesale trade	4.0%	4.1%	3.9%
9039 Local govt.	3.7%	4.2%	3.6%
54 Professional services	3.6%	4.0%	6.5%
48-49 Transportation & warehousing	3.5%	3.4%	3.5%
55 Corporate & regional offices	2.7%	2.2%	1.4%
11 Agriculture & forestry	1.4%	1.9%	1.3%
71 Arts, entertainment, & recreation	1.4%	1.5%	1.7%
51 Information	1.3%	1.6%	1.9%
53 Property sales & leasing	0.9%	1.1%	1.7%
9029 State govt.	0.6%	1.1%	1.5%
9011 Federal govt. (civilian)	0.6%	1.0%	1.8%
22 Utilities	0.2%	0.3%	0.4%
21 Mining (incl. oil & gas)	0.1%	0.1%	0.4%

*Education includes all public schools, colleges, and universities. Healthcare includes all public hospitals. Excludes military and unclassified employment.

Source: Emsi 2017.1—QCEW Employees, Non-QCEW Employees, and Self-Employed.

Figure 25 shows the location quotients (LQ) for industry employment for the region and the state, which measures the concentration of employment relative to the US. The I-41 Corridor has a higher-than-average concentration of employment in manufacturing. For every one (1.00) person working in the manufacturing sector in the nation as a whole, there are 2.34 manufacturing workers in the I-41 region. Corporate and regional offices (1.90) and finance and insurance (1.28) also register above-average LQs within the region.

FIGURE 25. INDUSTRY CONCENTRATION (LQ)
COMPARISON OF I-41 REGION WITH STATE AND US

NAICS Code & Description	I-41	Wisconsin	US
31-33 Manufacturing	2.34	1.91	1.00
55 Corporate & regional offices	1.90	1.54	1.00
52 Finance & insurance	1.28	1.06	1.00
11 Agriculture & forestry	1.16	1.51	1.00
23 Construction	1.05	0.85	1.00
42 Wholesale trade	1.05	1.06	1.00
9039 Local govt.	1.04	1.16	1.00
48-49 Transportation & warehousing	1.03	0.99	1.00
44-45 Retail trade	0.98	0.98	1.00
81 Personal & other services	0.93	0.98	1.00
62 Healthcare & social assistance*	0.91	1.00	1.00
72 Lodging, restaurants, & bars	0.87	0.91	1.00
71 Arts, entertainment, & recreation	0.83	0.85	1.00
56 Administrative & support services	0.80	0.82	1.00
61 Education*	0.79	0.90	1.00
51 Information	0.71	0.88	1.00
54 Professional services	0.56	0.61	1.00
53 Property sales & leasing	0.54	0.64	1.00
22 Utilities	0.52	0.91	1.00
9029 State govt.	0.40	0.75	1.00
9011 Federal govt. (civilian)	0.30	0.52	1.00
21 Mining (incl. oil & gas)	0.26	0.24	1.00

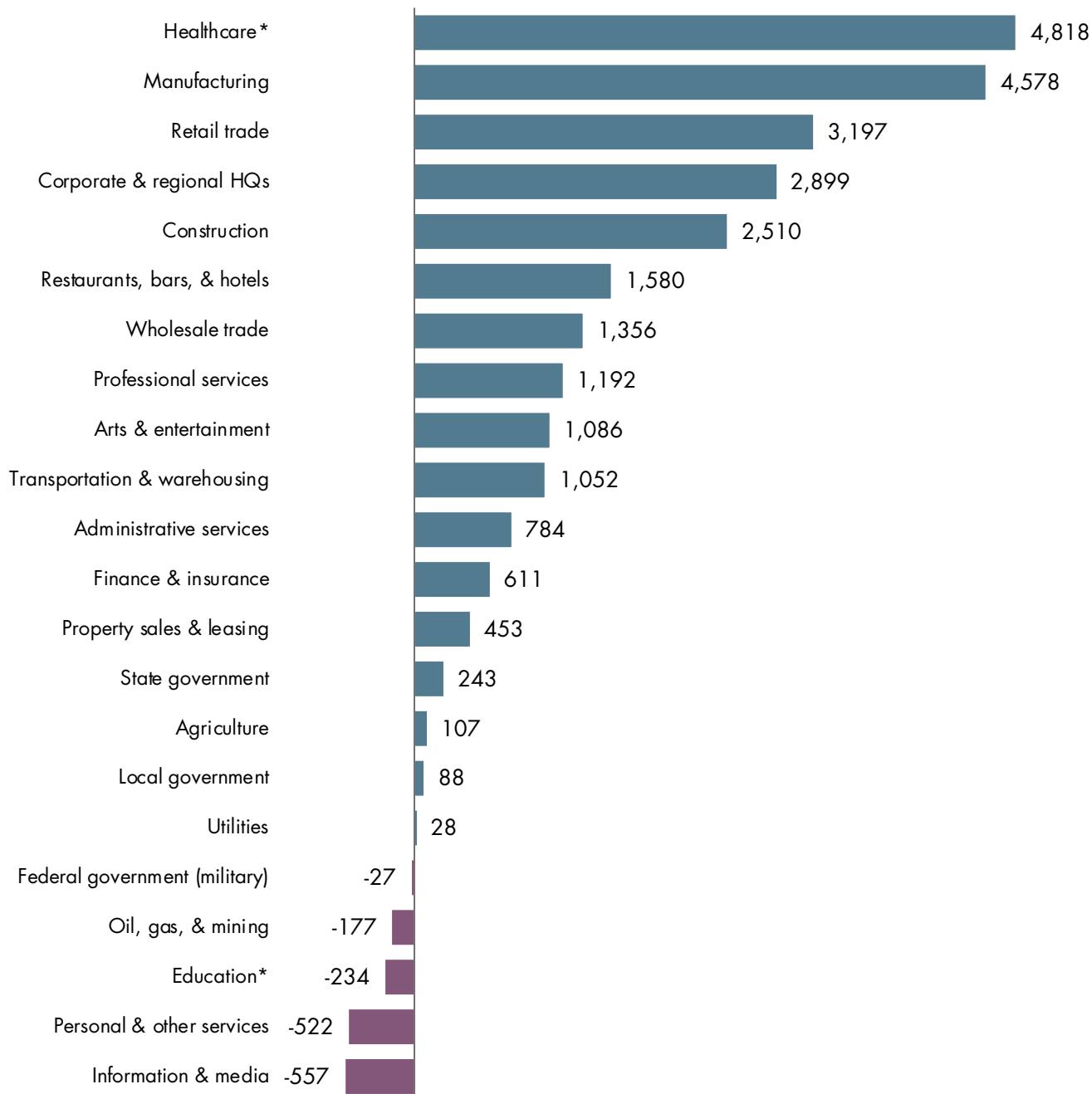
*Education includes all public schools, colleges, and universities. Healthcare includes all public hospitals. Excludes military and unclassified employment.

Source: Emsi 2017.1 —QCEW Employees, Non-QCEW Employees, and Self-Employed.

LOCATION QUOTIENT (LQ) ANALYSIS is a statistical technique used to suggest areas of relative advantage based on a region's employment base. LQs are calculated as an industry's share of total local employment divided by the same industry's share of employment at the national level. If the local industry and national industry are perfectly proportional, the LQ will be 1.00. LQs greater than 1.2 are presumed to indicate a comparative advantage; those below 0.75 suggest areas of weakness but also point to opportunities for expansion or attraction.

Since the end of the recession in 2008, healthcare and manufacturing have been the dominant job-generating sectors in the corridor, each adding over 4,500 jobs. Additionally, employment in retail trade, corporate and regional HQs, and construction increased by at least 2,500 jobs. Sectors suffering the largest post-recession job losses include information and media, personal services, and education.

FIGURE 26. NET CHANGE IN JOBS BY INDUSTRY, 2008-2016



*Education includes all public schools, colleges, and universities. Healthcare includes all public hospitals. Excludes military and unclassified employment.

Source: Emsi 2017.1—QCEW Employees, Non-QCEW Employees, and Self-Employed.

OCCUPATIONAL ANALYSIS

The previous Industry Analysis section focused on the distribution of jobs by sector according to NAICS codes. This Occupational Analysis section uses the Standard Occupational Classification (SOC) system to look at the structure of employment by occupation. The section examines the occupational composition of the region at the major group and detailed occupation level. The analysis highlights regional occupational strengths (concentrations) in addition to occupations currently in demand by regional employers based on both traditional and real-time labor market data.

The region's largest industries are mirrored in its largest occupational groups: office and administrative support (which contributes to a range of industries including manufacturing, corporate and regional offices, and finance and insurance) and production (an essential group of occupations that drive the manufacturing sector).

MAJOR OCCUPATIONAL GROUPS

FIGURE 27. EMPLOYMENT BY OCCUPATION, I-41 REGION

SOC Code & Description		I-41 Region
43	Office & Administrative Support	61,456
51	Production	53,523
41	Sales & Related	42,153
35	Food Preparation & Serving Related	34,148
53	Transportation & Material Moving	31,979
29	Healthcare Practitioners & Technical	21,551
25	Education, Training, & Library	19,947
11	Management	19,231
13	Business & Financial Operations	19,185
47	Construction & Extraction	17,334
49	Installation, Maintenance, & Repair	16,300
39	Personal Care & Service	15,564
37	Building/Grounds Cleaning & Maintenance	9,881
31	Healthcare Support	9,732
15	Computer & Mathematical	8,517
17	Architecture & Engineering	7,775
33	Protective Service	7,450
21	Community & Social Service	5,695
27	Arts, Design, Entertainment, Sports, & Media	4,814
19	Life, Physical, & Social Science	2,322
45	Farming, Fishing, & Forestry	2,285
23	Legal	1,316

Source: Emsi 2017.1 —QCEW Employees, Non-QCEW Employees, and Self-Employed.

Note: Excludes military and unclassified occupations.

The top three occupational groups in the I-41 Corridor—office and administrative support, production, and sales and related—account for 38.1 percent of total employment. The most notable difference between the I-41 Corridor and the US is in the share of production jobs, which account for roughly 13 percent of all jobs in the I-41 region yet comprise only 6 percent of total employment in the US. This reflects the importance of manufacturing to the regional (and state) economies.

FIGURE 28. OCCUPATIONAL DISTRIBUTION (% OF TOTAL)
COMPARISON OF I-41 REGION WITH STATE AND US

SOC Code & Description	I-41 Region	Wisconsin	US
43 Office & Administrative Support	14.9%	14.7%	15.2%
51 Production	13.0%	11.1%	6.0%
41 Sales & Related	10.2%	9.6%	10.2%
35 Food Preparation & Serving Related	8.3%	8.5%	8.4%
53 Transportation & Material Moving	7.8%	7.4%	6.6%
29 Healthcare Practitioners & Technical	5.2%	5.7%	5.5%
25 Education, Training, & Library	4.8%	5.5%	5.8%
11 Management	4.7%	4.7%	5.5%
13 Business & Financial Operations	4.7%	4.6%	5.1%
47 Construction & Extraction	4.2%	3.4%	4.5%
49 Installation, Maintenance, & Repair	4.0%	3.8%	3.8%
39 Personal Care & Service	3.8%	4.7%	4.1%
37 Building/Grounds Cleaning & Maint.	2.4%	3.0%	3.8%
31 Healthcare Support	2.4%	2.6%	2.8%
15 Computer & Mathematical	2.1%	2.5%	2.8%
17 Architecture & Engineering	1.9%	1.8%	1.7%
33 Protective Service	1.8%	1.9%	2.3%
21 Community & Social Service	1.4%	1.4%	1.6%
27 Arts, Design, Entertainment, & Media	1.2%	1.2%	1.8%
19 Life, Physical, & Social Science	0.6%	0.7%	0.8%
45 Farming, Fishing, & Forestry	0.6%	0.7%	0.8%
23 Legal	0.3%	0.5%	0.8%

Source: Emsi 2017.1—QCEW Employees, Non-QCEW Employees, and Self-Employed.

Notes: Excludes military and unclassified employment. Three largest occupations are highlighted.

Occupational concentrations in the region tend to align with industry specializations. Therefore, given the regional and statewide strengths in manufacturing, the most notable concentration of jobs for the I-41 Corridor and Wisconsin, relative to the US, is in production occupations. LQs for transportation and material moving (1.17) and architecture and engineering (1.13) are also slightly higher than the US. However, I-41 Corridor's occupational concentrations within other high-wage, high-skill occupational categories fall below the US, including business and financial operations (0.92), management (0.85), and computer and mathematical (0.74). The least concentrated occupation is legal, with an LQ of 0.38 in the region and 0.60 in Wisconsin.

FIGURE 29. CONCENTRATION OF EMPLOYMENT BY OCCUPATION, 2017
LOCATION QUOTIENT (LQ) ANALYSIS BY MAJOR OCCUPATIONAL GROUP, US=1.00

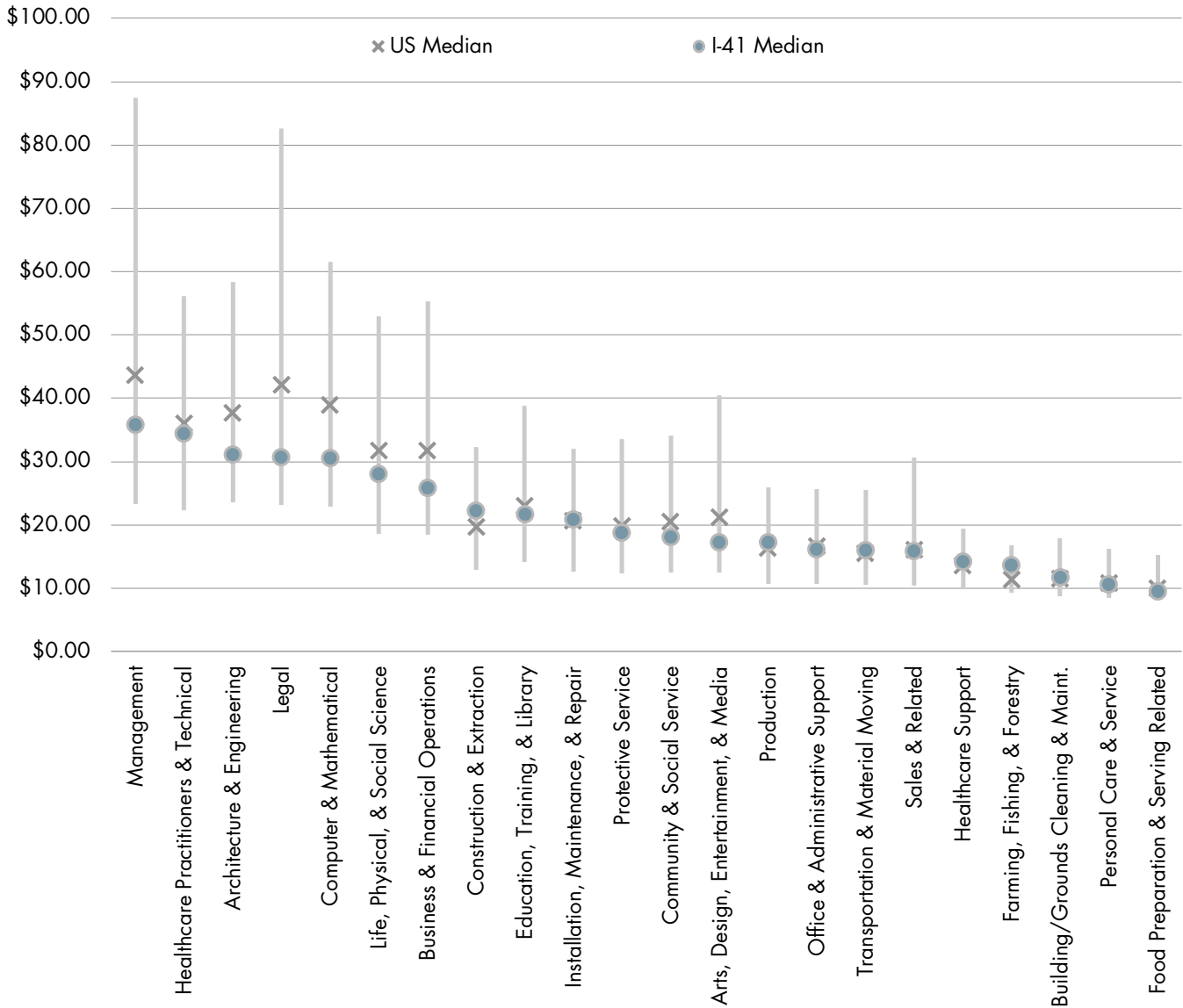
SOC Code & Description	I-41 Region	Wisconsin	US
51 Production	2.16	1.84	1.00
53 Transportation & Material Moving	1.17	1.12	1.00
17 Architecture & Engineering	1.13	1.09	1.00
49 Installation, Maintenance, & Repair	1.03	0.98	1.00
41 Sales & Related	1.00	0.94	1.00
35 Food Preparation & Serving Related	0.98	1.00	1.00
43 Office & Administrative Support	0.98	0.96	1.00
29 Healthcare Practitioners & Technical	0.96	1.04	1.00
47 Construction & Extraction	0.93	0.76	1.00
39 Personal Care & Service	0.92	1.14	1.00
13 Business & Financial Operations	0.92	0.91	1.00
11 Management	0.85	0.86	1.00
31 Healthcare Support	0.84	0.94	1.00
21 Community & Social Service	0.84	0.83	1.00
25 Education, Training, & Library	0.84	0.96	1.00
33 Protective Service	0.80	0.86	1.00
15 Computer & Mathematical	0.74	0.91	1.00
45 Farming, Fishing, & Forestry	0.71	0.92	1.00
19 Life, Physical, & Social Science	0.69	0.88	1.00
27 Arts, Design, Entertainment, & Media	0.64	0.67	1.00
37 Building/Grounds Cleaning & Maint.	0.63	0.77	1.00
23 Legal	0.38	0.60	1.00

Source: Emsi 2017.1 —QCEW Employees, Non-QCEW Employees, and Self-Employed.

Notes: Excludes military and unclassified employment. LQs greater than 1.25 are presumed to show competitive advantage and are highlighted.

Most of the highest-paying occupational groups pay notably lower wages in the I-41 Corridor than in the US, including management; legal; computer and mathematical; architecture and engineering; business and financial operations; and life, physical, and social science. Only construction and extraction, along with farming, fishing, and forestry pay slightly higher wages in the region compared to the nation.

FIGURE 30. I-41 REGION WAGES IN THE CONTEXT OF THE NATIONAL WAGE RATES
BY MAJOR OCCUPATIONAL GROUP



Source: Emsi 2017.1 —QCEW Employees, Non-QCEW Employees, and Self-Employed.
Notes: Figures exclude military occupations. Line = US wage range from the 10th to the 90th percentile.

DEMAND OCCUPATIONS

Low-skill occupations are those occupations that require a high school diploma or less and no on-the-job training. Middle-skill occupations are those occupations that require at least a high school diploma and some additional training but less than a bachelor’s degree. High-skill occupations are those that require a bachelor’s degree or higher. Compared to the US, the I-41 region has a higher share of middle-skill jobs, but a lower share of high-skill jobs.

The number of openings includes both new jobs and replacement jobs. Replacement jobs are positions needed to replace existing workers who leave the occupation due to a variety of factors, including retirement, career advancement, or exiting the workforce to raise children or attend school. Over the next 5 years, the region is expected to have about 69,000 job openings. More than 80 percent of these openings will be replacement jobs; 84 percent of the openings will be for middle-skill occupations and 68 percent for high-skill occupations. These large percentages and conversations with key regional business executives suggest employers will soon face a daunting challenge of filling critical positions due to an approaching wave of retirements.

FIGURE 31. OCCUPATIONS BY SKILL LEVEL, 2016

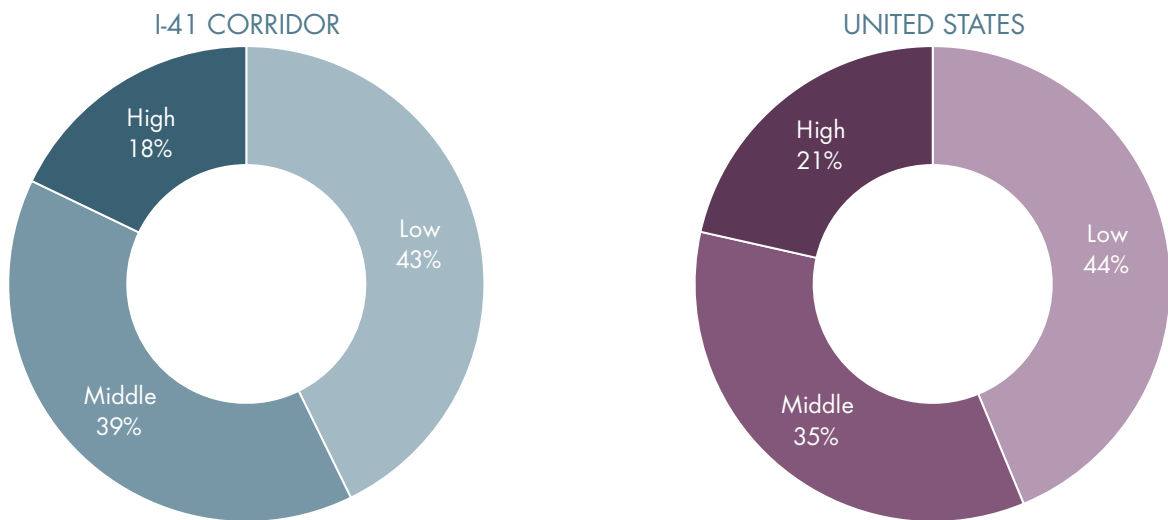
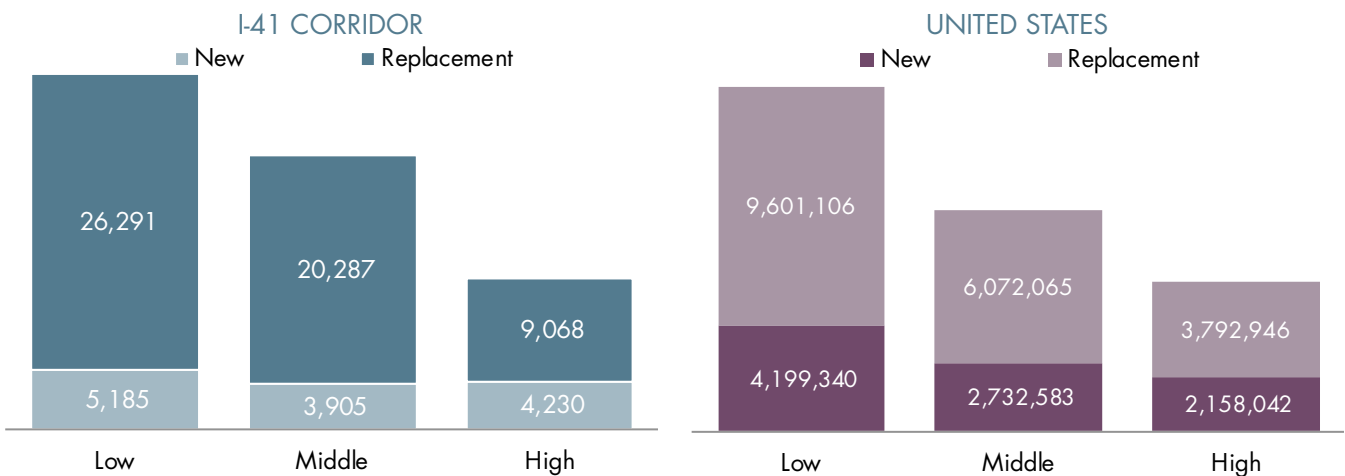


FIGURE 32. ESTIMATED OPENINGS BY SKILL LEVEL, 2016-2021



Source (all figures): Emsi 2017.1 —QCEW Employees, Non-QCEW Employees, and Self-Employed.

Figure 33 shows the region's top occupations based on various indicators.

FIGURE 33. TOP 10 OCCUPATIONS, BASED ON VARIOUS INDICATORS
I-41 REGION

Employment in 2016	◀ LARGEST	Median hourly earnings
13,494	Retail Salespersons	\$10.10
13,159	Office Clerks, General	\$15.15
10,370	Customer Service Representatives	\$15.77
9,627	Combined Food Prep. & Servers, Incl. Fast Food	\$8.86
9,478	Heavy & Tractor-Trailer Truck Drivers	\$19.63
9,052	Cashiers	\$9.12
7,236	Registered Nurses	\$29.08
7,084	Laborers/Freight, Stock, & Material Movers, Hand	\$14.26
6,905	Personal Care Aides	\$10.60
6,485	Sales Reps., Whls. & Mfg., Exc. Tech. & Scientific	\$27.24

Employment in 2016	HIGHEST-PAYING (\$) ▶	Median hourly earnings
356	Family & General Practitioners	\$108.56
101	Internists, General	\$107.65
680	Physicians & Surgeons, All Other	\$105.29
158	Surgeons	\$100.63
68	Anesthesiologists	\$97.20
72	Psychiatrists	\$93.57
54	Obstetricians & Gynecologists	\$92.60
113	Nurse Anesthetists	\$91.25
368	Dentists, General	\$83.50
637	Pharmacists	\$62.47

Net change	◀ FASTEST-GROWING, 2016-21 (#)	Median hourly earnings
+927	Personal Care Aides	\$10.60
+689	Customer Service Representatives	\$15.77
+429	Combined Food Prep. & Servers, Incl. Fast Food	\$8.86
+327	Cashiers	\$9.12
+313	General & Operations Managers	\$41.30
+312	Home Health Aides	\$10.59
+298	Registered Nurses	\$29.08
+272	Janitors & Cleaners, Exc. Maids & Housekeepers	\$11.62
+233	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	\$16.32
+231	Sales Reps., Whls. & Mfg., Exc. Tech. & Scientific	\$27.24

Source: Emsi 2017.1—QCEW Employees, Non-QCEW Employees, and Self-Employed.

Notes: Excludes military (I-41 region). Includes only those occupations with more than 50 jobs.

Figure 34 shows the top 20 high-demand occupations for each skill level—low, middle, and high. Many of the middle- and high-skill, high-demand occupations are facing a wave of retirements, with more than 25 percent of the workers in many of those occupations aged 55 or older

FIGURE 34. DEMAND FACTORS BY SKILL LEVEL

SOC CODE	DESCRIPTION	2016 Jobs	DEMAND FACTORS			Wage Premium over US	DEMOGRAPHICS	
			Projected Annual Openings (2016-21)	New jobs	Replacement		% 55-64 Years	% 65+ Years
LOW-SKILL (High school or less)								
35-3021	Combined Food Prep. & Servers, Incl. Fast Food	9,569	402	18%	82%	0.94	7%	3%
41-2031	Retail Salespersons	13,164	530	5%	95%	0.93	16%	7%
41-2011	Cashiers	8,966	464	12%	88%	0.94	11%	4%
53-7062	Laborers/Freight, Stock, & Material Movers, Hand	6,964	231	5%	95%	1.15	15%	3%
35-3031	Waiters & Waitresses	6,221	297	-	100%	0.90	4%	2%
43-4051	Customer Service Representatives	10,256	397	31%	69%	1.01	14%	2%
43-9061	Office Clerks, General	12,094	289	4%	96%	1.04	21% ◀	6%
43-5081	Stock Clerks & Order Fillers	4,674	181	13%	87%	0.86	15%	4%
33-9032	Security Guards	1,884	36	-	100%	0.93	18%	9%
37-2011	Janitors & Cleaners, Exc. Maids & Housekeepers	5,117	147	26%	74%	0.97	22% ◀	7%
43-6014	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	3,203	73	48%	52%	0.99	26% ◀	6%
35-2014	Cooks, Restaurant	2,594	82	14%	86%	0.93	8%	3%
39-9021	Personal Care Aides	6,726	241	65%	35%	1.02	17%	6%
31-1011	Home Health Aides	535	77	76%	24%	1.00	14%	3%
37-2012	Maids & Housekeepers	2,113	53	-	100%	0.91	18%	6%
43-4171	Receptionists & Information Clerks	2,784	105	24%	76%	0.98	18%	6%
35-9031	Hosts & Hostesses	687	49	-	100%	0.92	3%	3%
39-9011	Childcare Workers	1,537	49	-	100%	1.06	10%	5%
37-3011	Landscaping & Groundskeeping Workers	1,840	55	32%	68%	1.02	15%	6%
53-3033	Light Truck or Delivery Services Drivers	2,890	66	20%	80%	0.90	21% ◀	9%
MIDDLE-SKILL (More than high school, less than four years)								
29-1141	Registered Nurses	7,179	266	21%	79%	0.86	24% ◀	3%
51-2092	Team Assemblers	6,313	165	-	100%	0.94	19%	2%
49-9071	Maintenance & Repair Workers, General	3,988	115	5%	95%	1.05	26% ◀	5%
43-1011	First-Line Supvsr., Office & Admin. Support	3,932	105	38%	62%	0.96	22% ◀	3%
41-4012	Sales Reps., Whls. & Mfg., Exc. Tech. & Scientific	6,369	179	21%	79%	1.03	22% ◀	4%
35-1012	First-Line Supvsr., Food Prep. & Servers	1,706	66	19%	81%	0.88	10%	3%
33-3051	Police & Sheriff's Patrol Officers	1,232	50	15%	85%	0.97	12%	2%

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FIGURE 34. DEMAND FACTORS BY SKILL LEVEL (CONTINUED)

SOC CODE	DESCRIPTION	2016 Jobs	DEMAND FACTORS			Wage Premium over US	DEMOGRAPHICS		
			Projected Annual Openings (2016-21)	New jobs	Replacement		% 55-64 Years	% 65+ Years	
MIDDLE-SKILL (More than high school, less than four years)									
39-5012	Hairdressers, Hairstylists, & Cosmetologists	1,279	<div><div></div></div>	34	-	100%	0.89	9%	3%
25-9041	Teacher Assistants	2,771	<div><div></div></div>	90	22%	78%	0.92	21% ◀	3%
53-3032	Heavy & Tractor-Trailer Truck Drivers	9,028	<div><div></div></div>	185	8%	92%	1.01	25% ◀	6%
31-1014	Nursing Assistants	4,575	<div><div></div></div>	140	24%	76%	1.01	15%	3%
33-3012	Correctional Officers & Jailers	1,060	<div><div></div></div>	40	24%	76%	1.00	17%	3%
51-9061	Inspectors, Testers, Sorters, Samplers, & Weighers	2,110	<div><div></div></div>	61	3%	97%	0.95	24% ◀	3%
41-1011	First-Line Supvsr., Retail Sales Workers	2,748	<div><div></div></div>	93	29%	71%	0.98	15%	3%
51-9111	Packaging & Filling Machine Workers	2,876	<div><div></div></div>	106	-	100%	1.20	18%	3%
41-3021	Insurance Sales Agents	1,253	<div><div></div></div>	46	24%	76%	1.20	17%	4%
51-4041	Machinists	2,079	<div><div></div></div>	89	26%	74%	1.12	24% ◀	3%
29-2061	Licensed Practical/Vocational Nurses	1,375	<div><div></div></div>	62	33%	67%	0.93	21% ◀	3%
49-3023	Automotive Service Technicians & Mechanics	1,650	<div><div></div></div>	66	28%	72%	1.05	12%	3%
49-9041	Industrial Machinery Mechanics	1,703	<div><div></div></div>	58	20%	80%	0.97	27% ◀	2%
HIGH SKILL (Four-year degree or above)									
11-1021	General & Operations Managers	5,160	<div><div></div></div>	196	28%	72%	0.86	21% ◀	3%
13-2011	Accountants & Auditors	2,855	<div><div></div></div>	116	29%	71%	0.91	20%	4%
25-1099	Teachers, Postsecondary	3,317	<div><div></div></div>	103	30%	70%	0.93	25% ◀	7%
25-2021	Teachers, Elementary (Except Special Ed.)	3,191	<div><div></div></div>	94	21%	79%	0.94	23% ◀	2%
25-2031	Teachers, Secondary (Exc. Special Ed. & CTE)	2,830	<div><div></div></div>	87	18%	82%	0.90	24% ◀	2%
11-9111	Medical & Health Services Managers	1,090	<div><div></div></div>	43	31%	69%	0.81	29% ◀	3%
25-3098	Substitute Teachers	1,369	<div><div></div></div>	38	27%	73%	1.08	22% ◀	6%
29-1069	Physicians & Surgeons, All Other	644	<div><div></div></div>	31	38%	62%	1.21	22% ◀	6%
29-1062	Family & General Practitioners	341	<div><div></div></div>	13	19%	81%	1.29	23% ◀	6%
29-1141	Registered Nurses	7,179	<div><div></div></div>	266	21%	79%	0.86	24% ◀	3%
53-3032	Heavy & Tractor-Trailer Truck Drivers	9,028	<div><div></div></div>	185	8%	92%	1.01	25% ◀	6%
41-4012	Sales Reps., Whls. & Mfg., Exc. Tech. & Scientific	6,369	<div><div></div></div>	179	21%	79%	1.03	22% ◀	4%
31-1014	Nursing Assistants	4,575	<div><div></div></div>	140	24%	76%	1.01	15%	3%
49-9071	Maintenance & Repair Workers, General	3,988	<div><div></div></div>	115	5%	95%	1.05	26% ◀	5%
51-9111	Packaging & Filling Machine Workers	2,876	<div><div></div></div>	106	-	100%	1.20	18%	3%
43-1011	First-Line Supvsr., Office & Admin. Support	3,932	<div><div></div></div>	105	38%	62%	0.96	22% ◀	3%
47-2111	Electricians	2,260	<div><div></div></div>	102	19%	81%	0.98	15%	1%
41-1011	First-Line Supvsr., Retail Sales Workers	2,748	<div><div></div></div>	93	29%	71%	0.98	15%	3%
25-9041	Teacher Assistants	2,771	<div><div></div></div>	90	22%	78%	0.92	21% ◀	3%
51-4041	Machinists	2,079	<div><div></div></div>	89	26%	74%	1.12	24% ◀	3%

Source: Emsi 2017.1—QCEW Employees, Non-QCEW Employees, and Self-Employed.

APPENDIX 4. REPORT INVENTORY SUMMARY

To develop a full understanding of the I-41 Corridor’s existing assets and initiatives, TIP compiled an inventory of recommendations and strategies at both the regional and the local levels. The recommendations were mined from 17 planning documents published between 2004 and 2016.

The full inventory is provided in a separate Excel spreadsheet. Figure 35 shows a sample of strategies and recommendations that have the potential to be amplified on a regional basis or would need additional capacity to fully implement. These strategies also offer a level of specificity or creativity that goes beyond generic planning language. The strategies presented here, in addition to others cataloged in the full inventory, will help to inform findings and recommendations in the regional economic strategy.

The strategies are organized around relevant topics (for example, entrepreneurship and innovation, talent, and infrastructure). The specific document and year is also identified for each.

FIGURE 35. SAMPLE STRATEGIES

STRATEGY	DOCUMENT
BUSINESS RETENTION AND EXPANSION	
To develop a more cohesive and proactive approach to business outreach, it is suggested that the region’s economic development professionals, especially those engaged in business retention and expansion (BR&E) outreach coordinate with workforce development business services staff to establish a shared schedule of business outreach visits. It is recommended that the resulting outreach teams meet with representatives of all large firms in the region (that is, those employing more than 500 workers) on an annual basis, and that industry-specific outreach teams be created.	<i>A Collaborative Action Plan: For the East Central Wisconsin Region</i> (2015)
REGIONAL COLLABORATION	
The region’s economic development professionals and elected officials should begin exploring the creation of a shared economic development tax base model or the creation of multijurisdictional, tax-increment, finance districts and advocate for the necessary state legislative changes.	<i>A Collaborative Action Plan: For the East Central Wisconsin Region</i> (2015)
TOURISM	
Promote Oshkosh as a meeting place for business conferences, membership organizations, academic meetings, and other large groups	<i>Business and Industry Cluster Analysis</i> for the Oshkosh Area (2013)
Expand tourist, traveler, and frequent visitor database. Construct a regional land development plan inventory of the assets of the region. Hold a conference around each inventory set to network and generate a vision among the participants that is consistent with the NEW vision.	<i>Bridge to the New Economy: A Cluster-Based Strategy of the Fox Cities Economic Development Partnership</i> (2006)

ENTREPRENEURSHIP AND INNOVATION

Support and sponsor the creation of a regional business plan competition for students of local technical colleges and universities.

Develop a venture capital network akin to the Angels on the Water model.

Explore the formation of a centers of excellence network to support innovation in the region. Possible target industries include rapid packaging, alternative energy, and materials science.

Support the creation of innovation centers and programming promoted by technical colleges to increase the success rate of emerging new technologies.

Attract and foster the success of startup companies to InventureXcel.

More effectively link and apply research and development (R&D) and technology to production processes.

Facilitate delivery of resources and assistance to growth of regional “second-stage” growth companies. Identify second-stage growth companies in the areas of manufacturing, information and professional, and scientific and technical services.

Explore potential summit with Angels on the Water, 4490 Ventures representatives, Gener8tor, and Wisconsin Economic Development Corporation to discuss state and local funding capacity for growth companies

A Collaborative Action Plan: For the East Central Wisconsin Region (2015)

A Collaborative Action Plan: For the East Central Wisconsin Region (2015)

A Collaborative Action Plan: For the East Central Wisconsin Region (2015)

2012 Comprehensive Economic Development Strategy (CEDS), Bay-Lake Regional Planning Commission

UW Oshkosh Startup Accelerator Program Business Plan—InventureXcel (2015)

2013 Comprehensive Economic Development Strategy Executive Summary

Business and Industry Cluster Analysis for the Oshkosh Area (2013)

Business and Industry Cluster Analysis for the Oshkosh Area (2013)

INFRASTRUCTURE

The East Central Wisconsin Regional Planning Commission should convene a regional airport committee. This committee would bring together the directors of the region’s airports to consider shared issues and opportunities.

Develop highway corridors plans for STH 54/57, I-43, STH 23, STH 29, and USH 141/41 to identify valuable development opportunities while preserving agriculture land and natural areas.

A Collaborative Action Plan: For the East Central Wisconsin Region (2015)

2012 Comprehensive Economic Development Strategy (CEDS), Bay-Lake Regional Planning Commission

MARKETING AND BRANDING

The region should look at the development of a marketing strategy built around its unique productive capacities, that is, Milwaukee’s turn-of-the-19th century claim as the “Machine Shop of the World.” Quality can be stressed, in addition to knowledge of productive processes that no longer exists elsewhere.

A Collaborative Action Plan: For the East Central Wisconsin Region (2015)

TALENT

Advocate for the creation of a tuition or student loan forgiveness program for promising information technology students who either return to or remain in the area.

The development of an adult internship model to both utilize the knowledge of retiring workers and expose career changers to industry possibilities. The Northeast Wisconsin Manufacturing Alliance has considered a mentorship model where retiring workers' wages are subsidized to train new workers. This model could be expanded regionally to create a series of internships for jobseekers who are considering a career change in manufacturing. This one-on-one experience would build confidence in skill sets and would be accompanied by directed career counseling to identify transferable skill sets and career opportunities.

A regional innovation academy model should be created to encourage youth career exploration.

Building the workforce,

- by getting students interested in careers in aviation through a talent upload event and partnering with K-12 on increasing awareness at that level,

- by holding events designed to help employers in aviation and aerospace to share and learn about best practices in recruitment, retention, and development (best practices series)

- by exploring possibilities of additional aviation specific educational programming with Fox Valley Technical College (FVTC) and UW Oshkosh—aerospace engineering in particular—working with industry to develop internship programs.

A Collaborative Action Plan: For the East Central Wisconsin Region (2015)

A Collaborative Action Plan: For the East Central Wisconsin Region (2015)

A Collaborative Action Plan: For the East Central Wisconsin Region (2015)

Regional Aerospace Cluster Development Business Plan: Additive Manufacturing (2015)

GLOBAL TRADE AND INVESTMENT

Create a strong global trade resource network through the global trade strategy to assist companies seeking ways to expand their businesses through exporting or an increase in current export levels.

Increase capacity of economic development professionals to better assist companies seeking to expand into global markets. Develop a strategy framework to identify, prioritize, and engage companies that could benefit from services aimed at encouraging global trade. Actively promote infrastructure and policy initiatives at the local and state level that would benefit global trade in Northeast Wisconsin.

2012 Comprehensive Economic Development Strategy (CEDS), Bay-Lake Regional Planning Commission

Northeast Wisconsin Global Trade Strategy Part 1 of 2: A Strategy for Increasing Exports in Northeast Wisconsin (2012)

INDUSTRY DEVELOPMENT

Support efforts to strengthen and grow the district's core industrial clusters, such as paper, paper converting, forestry, agriculture, metal, equipment manufacturing, ship building,

2012 Comprehensive Economic Development Strategy (CEDS), Bay-Lake Regional Planning Commission

and food production.

Build a network among aviation-focused business parks located on the four partner airports—Wittman Regional Airport, Fond du Lac County Airport, Appleton International Airport, Green Bay Austin Straubel International Airport—through regional collaboration and joint manufacturing efforts.

Regional Aerospace Cluster Development Business Plan: Additive Manufacturing (2015)

DEVELOPMENT AND REDEVELOPMENT

Revitalize underutilized commercial and industrial areas and identified blighted sites.

2012 Comprehensive Economic Development Strategy (CEDS), Bay-Lake Regional Planning Commission

Conduct an annual community project survey to enable the commission and local economic development entities to better assist local municipalities in completing projects that will support business development while becoming increasingly more sustainable.

2012 Comprehensive Economic Development Strategy (CEDS), Bay-Lake Regional Planning Commission

Develop water-related activities and amenities to attract tourists to the river and the downtown waterfront.

Business and Industry Cluster Analysis for the Oshkosh Area (2013)

Promote the benefits of “livable communities”: higher density, mixed land uses, and connectivity. These benefits include higher home values, which are attractive to “new” economy workers and tourists, and the ability to retain a mobile and diverse workforce.

2016 Comprehensive Economic Development Strategy (CEDS) Annual Performance Report

Target and support the creation of additional medium- and high-density residential and mixed-use development in proximity to the university campus, FVTC, and the downtown area.

Business and Industry Cluster Analysis for the Oshkosh Area (2013)

Explore potential public-funding sources for programs to attract and assist first-time homebuyers in the designated redevelopment area.

Business and Industry Cluster Analysis for the Oshkosh Area (2013)

APPENDIX 5. STAKEHOLDER INPUT

We would like to thank all the individuals who participated in the planning process by providing valuable input. Below are the stakeholders who visited with the consulting team and shared their views in either an individual interview or a roundtable discussion.

INTERVIEWS

Joe Moore, City of Fond du Lac
Steve Cummings (mayor), City of Oshkosh
Steve Jenkins, Fond du Lac County EDC
Carol Karls, Wisconsin Public Service
Bob DeKoch, The Boldt Company
Ann Franz, NEW Manufacturing Alliance
Bob Endries, Endries International
Pam Seidl, Fox Cities Convention and Visitors Bureau
Abe Weber, Appleton International Airport
Peter Zaehring, Greater Green Bay Chamber

Tim Hanna (mayor), City of Appleton
Mark Harris (county executive), Winnebago County
Sharon Hulce, Employment Resource Group
John Pfeifer, Mercury Marine
Cecilia Harry, Envision Greater Fond du Lac
Todd Koss, Grande Cheese Company
John Kreul, Bemis Company
Kathi Seifert, Katapult, LLC
Jerry Murphy, New North, Inc.
Troy Parr, Oneida Nation

ROUNDTABLES

Mitch Foster, Village of Winneconne
Dena Mooney, Calumet County
Chris Haese, City of Neenah
Kim Flom, City of De Pere
Adrienne Palm, Fox Cities Chamber of Commerce
Kolin Erickson, ECWRPC
Tyler DeBruin, ECWRPC
Lauron Clark, ECWRPC
Amber Thiel, Oshkosh Chamber of Commerce
Mindie Boynton, UW Oshkosh
Kristopher Ulrich, Oshkosh Area Community Foundation
Ryan Albers, Quill Creative
Susan May, Fox Valley Technical College
Dean Stewart, Northeast Wisconsin Technical College
Jake Woodford, Lawrence University
Paul Belschner, Base Companies
Clay Veldt, Hoffman Planning, Design & Construction, Inc.
Tom Janke, Fond du Lac County
Walt Raih, ECWRPC
Dean Steingraber, Outagamie County
Dave Vickman, Valley Transit
Cole Runge, Brown County
Bob Doemel, Winnebago County Highway Commission
Holly Keenan, Making the Ride Happen, Lutheran Social Services of Wisconsin

Bob Jakel, City of Kaukauna
Dave Tebo, Town of Greenville
Travis Coenen, Village of Wrightstown
Matt Buchanan, City of Green Bay
Sarah Pielhop, Grow Foundation
Ashley Tracy, ECWRPC
Kyle McNair, ECWRPC
Nikki Hessel, Fox Cities Chamber of Commerce
Joe Venhuizen, Envision Greater Fond du Lac
Nathan Litt, Quill Creative
Katie Neitzel, Oshkosh Area Community Foundation
Andrew Leavitt, UW Oshkosh
Peter Kittel, Brillion High School
Elizabeth Hartman, UW Oshkosh
Manny Vasquez, Newmark Grubb Pfefferle
Sam Statz, Hoffman Planning, Design & Construction, Inc.
Jill Hendricks, Hoffman Planning, Design & Construction, Inc.
Kim Biedermann, ECWRPC
Ron McDonald, Valley Transit
Jordan Skiff, City of Fond du Lac
James Rabe, City of Oshkosh
Dean Haen, Port of Green Bay
Carol Karls, Wisconsin Public Service
Anthony Bianchina, ECWRPC