

Little Potato Company Facility
in DeForest, Wisconsin



2019

State of the Madison Region Report & **ADVANCE NOW 2.0** Strategy Update



MADISON REGION
ECONOMIC PARTNERSHIP

madisonregion.org

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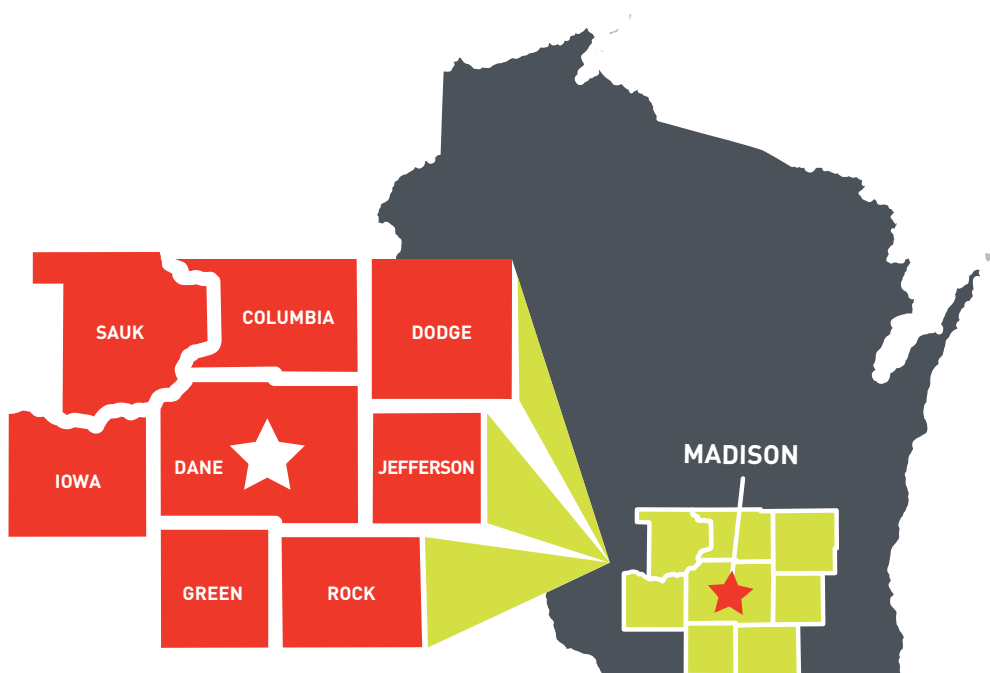
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WHO WE ARE >

MADISON REGION ECONOMIC PARTNERSHIP (MADREP) is the state-recognized economic development agency for the eight-county Madison Region of south-central Wisconsin. It operates off an asset-based comprehensive economic development strategy known as Advance Now 2.0 which concentrates resources in its key industry sectors: agriculture, food and beverage, advanced manufacturing, healthcare, information communications technology, and bioscience. The region is comprised of Iowa, Sauk, Columbia, Dodge, Jefferson, Rock, Green and Dane counties, with the new strategy covering all but Iowa and Green counties (covered by SW WI's strategy).

MadREP promotes the development of a dynamic economy through a comprehensive regional approach to economic development, the strategic pursuit of job creation and business growth in target clusters, and the development of a coordinated talent pipeline.



WHAT'S NEXT: ADVANCE NOW 2.0 »

THE MADREP STAFF AND BOARD OF DIRECTORS are pleased to share this 2019 State of the Madison Region report with you. It represents the culmination of our initial Advance Now strategy and the transition to Advance Now 2.0.

We are grateful to the more than 30 individuals on our 2.0 Steering Committee who helped guide Market Street Services in the creation of the new plan that was adopted in March.

Advance Now 2.0 builds on the successes that the region has enjoyed through advancing economic competitiveness, a more robust entrepreneurship and innovation ecosystem, rigorous human capital initiatives, expanded national attention to the region through earned media and paid marketing, and through collaborative efforts to improve our diversity and inclusion practices.

As you will see in this publication, our focus in the next five years will be on Growth Capacity and Coordination, Awareness and Differentiation, Business Expansion and Enterprise Creation, and Opportunity Access and Equity. We invite you to check out the new Comprehensive Economic Development Strategy (CEDS) to get a better idea of the region's work plan and how we stack up against the top regions in the country. While doing so you might also want to browse our sector abstracts which profile our key industry clusters. This report will show you why the Madison Region was named the most industrially diverse region in the country by Economic Modeling Services, Inc. (EMS) last year. MadREP reports can be found at madisonregion.org/research.

That diversity, along with the extraordinary workforce interdependency that exists among our eight counties, demands a regional approach to economic development and will continue to influence our asset-based initiatives.

Thanks once again to all our public and private sector partners and investors who help us continue to build on the region's economic successes. We are honored to represent such a vital and robust area of the state and are very optimistic that the best is yet to come.



Daniel Brown
Board Chair



Paul Jadin
President, MadREP

“To continue forging ahead in overcoming identified challenges and increasing regional competitiveness, it is time for the region to again assess its competitive position through a comprehensive quantitative and qualitative research process... Now is not the time for status quo thinking or limiting strategic ambition; to achieve the destination status of comparison areas such as Austin, Raleigh, and Portland, the Madison Region must redouble efforts to invest in and implement a transformative agenda for positive change.”

– Madison Region, Wisconsin: Advance Now 2.0 Comprehensive Economic Development Strategy (CEDS)

ADVANCE NOW 2.0

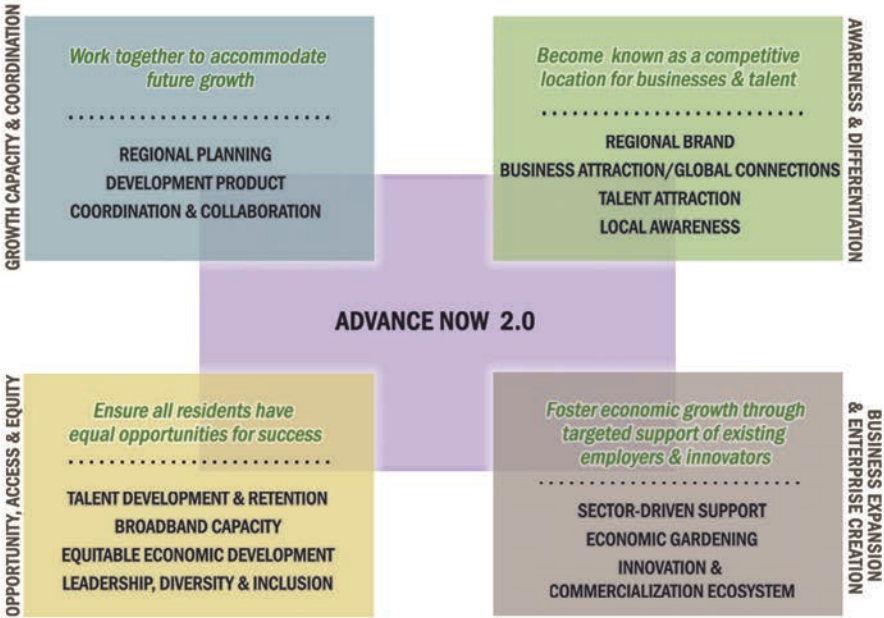
2013 - 2018 Strategy



 **ADVANCE NOW**
Madison Region's Strategy for Economic Growth
TAKING OUR REGION TO THE NEXT LEVEL

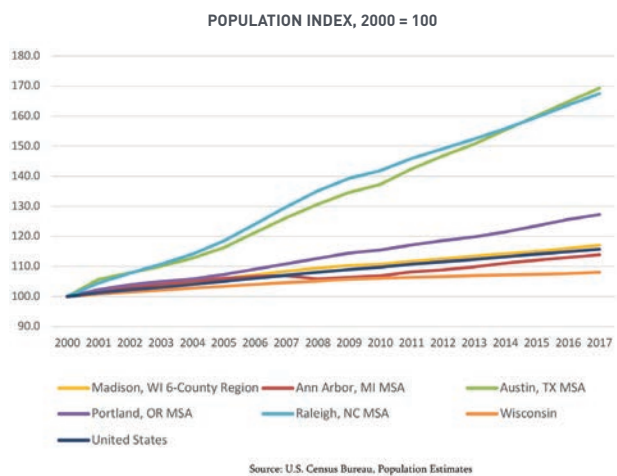
2019 - 2024 Strategy

THE MADISON REGION WILL...



KEY FINDINGS

- The region’s competitive assessment was sobering
- Divergent Growth in 8 Counties
- Local communities need to become intimately familiar with their own economies AND acknowledge their interdependence
- A six-county Regional Plan Commission may be necessary to address:
 - Housing
 - Transportation
 - RTA
- Expand economic gardening
- Broadband coverage must be enhanced
- Redouble efforts on collaboration and regional economic development investment



STEERING COMMITTEE’S PRIORITIES

A steering committee convened to oversee the Advance Now 2.0 strategy and was instrumental in guiding the process and making key decisions about the Madison Region’s strategic economic direction over the next five years.

- 1** Assess opportunities to provide gigabit broadband connectivity to regional residents and businesses
- 2** Develop a brand identity and messaging platform for the Madison Region
- 3** Effectively prepare Madison Region K-12 students for college and careers
- 4** Conduct proactive, coordinated business retention and expansion (BRE) visits across the Madison Region
- 5** Continue evolving two- and four-year higher education programming to align with and support the regional economy
- 6** Optimize processes to bring innovative technologies to market
- 7** Continue enhancing and developing sector-specific Centers of Excellence in the Madison Region
- 8** Build consensus for the creation of a multi-county regional planning commission in the Madison Region

TARGET SECTORS »

MADREP IS THE ONLY REGION in the state of Wisconsin to have comprehensively studied and profiled all five of its industry sectors of significance: agriculture, food and beverage, advanced manufacturing, healthcare, information communications technology, and bioscience. These analyses examine each industry sector to identify its potential advantages and position it for growth. This research also helps garner targeted attention and funding from the Wisconsin Economic Development Corporation (WEDC), the state agency overseeing attraction of talent, entrepreneurs, and capital investments. These data are shared with the business community and are crucial to MadREP's supply chain investments, global brand marketing, and infrastructure investments. They also figure prominently in our international trade promotion, workforce investments, diversity initiatives, and transportation and broadband infrastructure planning. *The reports are completed internally by MadREP staff in collaboration with Matt Kures of the UW-Extension, Center for Community and Economic Development. MadREP reports can be found at madisonregion.org/research.*



MADISON REGION'S AGRICULTURE, FOOD AND BEVERAGE INDUSTRY CLUSTER ANALYSIS

Our first complete industry sector, Agriculture, Food and Beverage Manufacturing (AFB) is now five years old and has supported our designation by the US Department of Commerce as an Investing in Manufacturing Communities Partnership (IMCP) region. The AFB report continues to advance projects like the Wisconsin Innovation Kitchen, the Madison Public Market, the Garver Feed Mill, the F.E.E.D. Kitchen, and the UW Center for Dairy Research new Babcock Hall Construction. Moving forward, the AFB insights will support:

- New UW Center for Dairy Research Incubator, pilot plant, and aseptic testing facility
- US Farm Bill Dairy Business Innovation Grant from the State of Wisconsin
- Market research and a Beginning Farmer Grant Program application to the USDA
- Business model formation for the Madison Cross Dock Facility
- Fundraising and partnerships for Wisconsin's first Soybean Crushing Facility in Waupun
- Development of Wisconsin Branding and Regulatory framework for Industrial Hemp production and HEMP 2.0 legislation for the state

TARGET SECTORS »



MADISON REGION'S INFORMATION COMMUNICATIONS TECHNOLOGY (ICT) INDUSTRY CLUSTER ANALYSIS

As a result of our region-wide ICT cluster analysis, MadREP identified a substantial tech talent pipeline and a significant need to invest in our region's broadband infrastructure. Our insights included:

- ICT Start Up Dynamic: Over 130 new ICT startups per year in 2016 and 2017 in the region.
- ICT is more than Health IT. Gaming (6 AAA studios) and E-Commerce (Land's End, Colony Brands, Amazon, Duluth Trading) are also strong, global and growing.
- Epic is still half the pie, but the pie is almost four times bigger. Epic was half the 5,500-person ICT employment in 2000 and remains half of the 19,000 ICT employment in 2016.
- True broadband speeds, broadband leaders and dead zones, and funding opportunities were profiled.



MADISON REGION'S ADVANCED MANUFACTURING INDUSTRY CLUSTER ANALYSIS

Though it is not as dominant a sector in the Madison Region as it is in the rest of the state when analyzing employment and establishment totals, advanced manufacturing is critical to the region's economy and one of the reasons we are so industrially diverse.

- Productivity in manufacturing has declined in both the region and state and we trail the nation in GDP/worker output.
- There are 332 Second Stage Manufacturers (\$1-50 million in sales and 10-99 employees) in the Madison Region.
 - Huge growth opportunities exist if these companies move away from competing with China on commodities and focus their efforts on exports, R&D, cyber security, and innovation.
- Advanced composites (including plastics and glass), bicycles, medical devices, and electrical equipment and appliances are significant manufacturing niches.
- In 2017-2018, our region's four technical colleges conferred over 1,000 degrees and certificates in this field.

TARGET SECTORS »



MADISON REGION'S HEALTHCARE INDUSTRY CLUSTER ANALYSIS

Healthcare is generally regarded as a non-export sector, which simply means that goods and services are sold mainly in the community in which the healthcare establishment resides. In many respects it would suggest that most regions of the country would see similar impacts from this sector. Once again, the University of Wisconsin and our colleges help paint a different picture for this region:

- The School of Medicine and Public Health drives talent and research.
 - The Isthmus Project aligns the school with UW Health and has the potential to enhance the Madwaukee Corridor connection with Medical College of Wisconsin and Froedtert Hospital.
- Rural hospitals are generally the largest employers in their communities.
- Consolidation and telemedicine are key drivers impacting total establishments and employment.
- Additional market niches include health IT, medical devices, and clinical research.
 - 10% of all clinical research projects in the US are conducted in the state.
- Specialties include pediatrics, oncology, renal medicine, and organ transplants.
- In 2017-2018, our region's four technical colleges conferred nearly 3,000 degrees and certificates in biohealth.



MADISON REGION'S BIOSCIENCE INDUSTRY CLUSTER ANALYSIS

This is another sector which distinguishes the Madison Region from the rest of the state. It has seen rapid growth in the past decade and, more recently, the regional landscape has been altered by mergers and acquisitions, foreign direct investments, and exponential growth by a few companies.

- Bio and healthcare combined dominate local startup investment.
- Market drivers include the UW, Wisconsin Alumni Research Foundation, an abundance of research, and the creation of significant intellectual property.
- Market advantages include R&D, talent, innovation, and cost of production.
- Region is strong in regenerative medicine, genomics, biomanufacturing, pharma/nutraceuticals, and research tools.

BUSINESS RETENTION & EXPANSION

Long seen as a foundational component of economic development, one of the key goals of Business Retention & Expansion efforts is to connect businesses to resources necessary for their survival and growth. This is especially important when unanticipated events occur, such as the inclement weather that struck south-central Wisconsin in August/September 2018 and March 2019 causing extensive flood and wind damage to hundreds of businesses across the region. To help mitigate that damage, MadREP leveraged emergency funds provided by the Wisconsin Economic Development Corporation (WEDC) to offer businesses 0% interest Disaster Recovery Microloans of up to \$15,000 with two-year repayment plans, including payment deferrals for the first six months. In total, 54 businesses were assisted, accounting for more than \$750,000 in loans. With this program, MadREP was able to play a very proactive role in retaining these businesses in the Madison Region.

Thank you to the many local officials, chambers and county emergency management staff who helped make connections and introductions to ensure the success of this program.



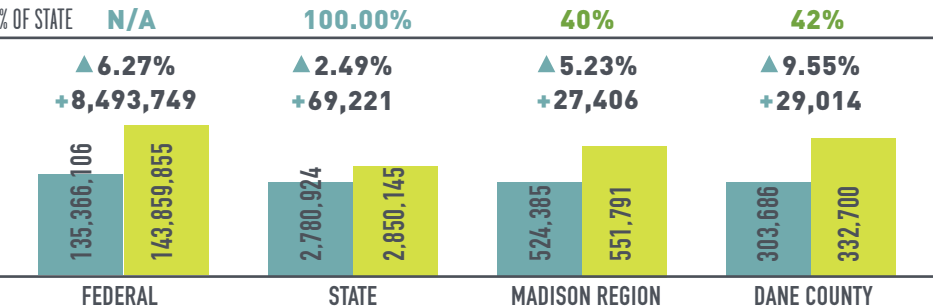
Rock Springs, Sauk County. Image courtesy of Jeremy Drexler, UAS Volunteer.

ECONOMIC GROWTH »



Recent data show the Madison Region significantly outpacing the state's growth in the economy.

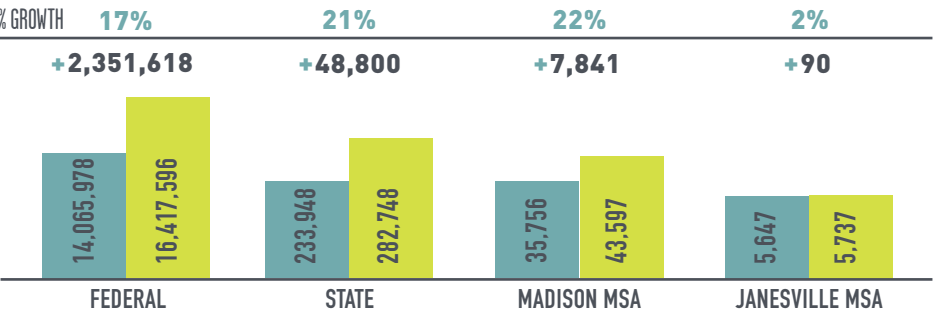
JOB GROWTH (2007-2017) ● 2007 ● 2017



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

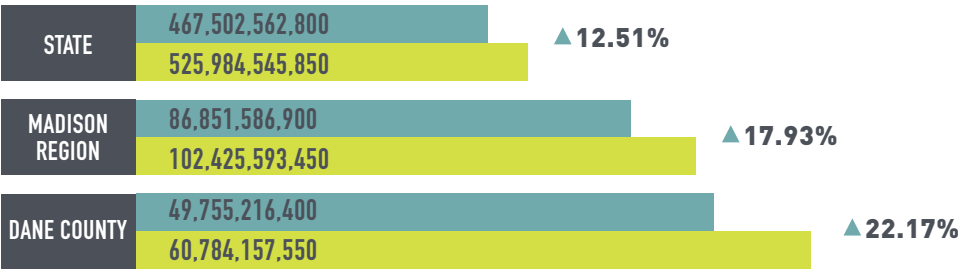
REAL GROSS DOMESTIC PRODUCT (GDP) GROWTH (2007-2017)

(millions of chained 2009 dollars) ● 2007 ● 2017



Source: Bureau of Economic Analysis

TAX BASE GROWTH (DOR EQUALIZED VALUE, 2013-2017) ● 2013 ● 2017



ECONOMIC COMPETITIVENESS AND INNOVATION & ENTREPRENEURSHIP >

ATTRACTION OPPORTUNITIES

In 2018, MadREP processed another 37 site search requests for information (RFIs) throughout the region as well as many other data requests from our regional partners supporting attraction, foreign direct investment, and expansion/retention projects.

2016-2018

**102 RFIs REQUESTING 5.2 MILLION SF
OF MANUFACTURING/WAREHOUSE SPACE**



**~1 MILLION SF CLASS A OFFICE SPACE AND
3,500 ACRES GREENFIELD INDUSTRIAL PARK LANDS**

In 2018/2019, the following MadREP Site Search Projects hit major milestones:

- Following MadREP-led searches, Drexel in Columbus and Little Potato Company in DeForest held their grand openings.



- Following MadREP-led search, Eurofins chose a greenfield site in Madison for their R&D facility (400 jobs; \$40M capex; 130k SF).



- MacDon/Linamar chose a site in Sun Prairie for their new R&D facility after a MadREP site search in partnership with Broadwing Advisors (15K SF, 20 jobs, \$5M capex).



- Phoenix chose a site in Fitchburg for their new R&D and production facility after a MadREP site search in partnership with Cresa Partners (70-120 jobs; \$13-15M capex).



- MadREP facilitated financial assistance from the State of Wisconsin for Eurofins, MacDon, and Phoenix.

- Interstate Partners, LLC and Greywolf Partners both built spec buildings over 100,000 SF in size in Sun Prairie and Madison.



- Gold Shovel verifications have been started on sites in Evansville, Whitewater, Madison and Horicon.



ECONOMIC COMPETITIVENESS AND INNOVATION & ENTREPRENEURSHIP »

SITE SELECTOR CONNECTIONS



In May 2018, MadREP hosted the Business Facilities LiveXchange event at the Edgewater Hotel. This national event, organized by *Business Facilities Magazine*, hosted 21 site selectors, C-level Development executives from Fortune 1000 companies, and regional economic development executives. During this three-day event, MadREP showcased the real estate assets of the region, our nationally ranked talent ecosystem and quality of life, and interfaced with companies and site selectors holding a portfolio of projects. MadREP also attended the MidAmerican Economic Development Council's Site Selection Conference in Chicago and met with over a dozen site selectors interested in the Madison Region. Staff are currently serving on the Wisconsin Host Committee for the September 2019 IAMC Conference in Milwaukee. This event will attract hundreds of site consultants, brokers, developers, engineers, and utilities working nationally in site selection.

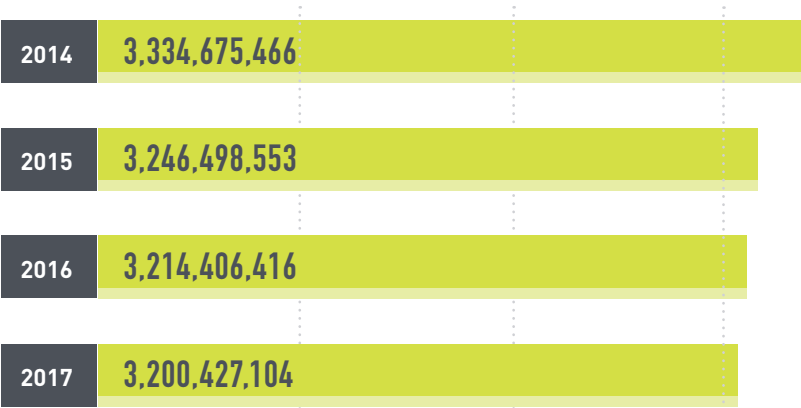
OPPORTUNITY ZONE ROLL OUT

In January 2018, MadREP identified the hidden Opportunity Zone (OZ) regulation in the 2017 Tax Bill. This new investment tool in the US Tax Code was marketed throughout the region. MadREP worked with all eight counties and the governor's office on identification of potential census tracts for inclusion. In 2018 the US Treasury announced OZ destinations in seven of MadREP's eight counties. MadREP has co-hosted OZ Prospectus Summits in Madison and Sun Prairie with partners including the City of Madison, the City of Sun Prairie, Downtown Madison Inc., and the Greater Madison Chamber of Commerce. We continue to target similar summits in the balance of our designated OZ communities.

MadREP ENGAGES with the international community by promoting trade, courting Foreign Direct Investments (FDI), and connecting our Innovation & Entrepreneurship (I&E) ecosystem with industry consortia and regional economic agencies around the globe. Brexit, NAFTA (USMCA) and China have had significant influence on trade in the Region. We continue to address these issues through the following activities:

- Hosting WEDC foreign trade representatives, foreign economic agencies, and consulate generals from several countries.
- Connecting the Wisconsin Games Alliance (WGA) globally with gaming sectors in 10 countries. Colombia (COVA) is the newest GAMING connection in Latin America.
- Continuing to work with Wisconsin Manufacturing Extension Partnership (WMEP) and WEDC to promote the ExporTech Program throughout the region as exports have continued to drop regionally and state-wide over the past three years.
- Participating in SelectUSA, the largest national FDI event in the U.S. to get better connected, through the U.S. Department of Commerce, to key markets.

MADISON AND JANESVILLE MSA, EXPORT CHARTS
Exports continue to drop for the Region consistent with the drop statewide.



(Office of Trade and Economic Analysis (OTEA), Industry and Analysis, International Trade Administration, U.S. Department of Commerce.)

At the time of this publication, no agreements have been reached regarding BREXIT, NAFTA adoption, or a Chinese Trade Agreement.

CENTERS OF EXCELLENCE »

A CENTER OF EXCELLENCE (COE) is an entity or shared facility that provides leadership, ideation, research, support, networks, mentoring, and/or training for a key sector of the economy. In the MadREP model, it suggests simply that we attempt to leverage what we already do well into a best practice. In doing so, the region calls attention to its prowess in that sector, thereby enhancing opportunities to expand existing business, attract new business, and influence startup activity in that sector while ensuring that outside talent is fascinated enough to explore jobs in the region.

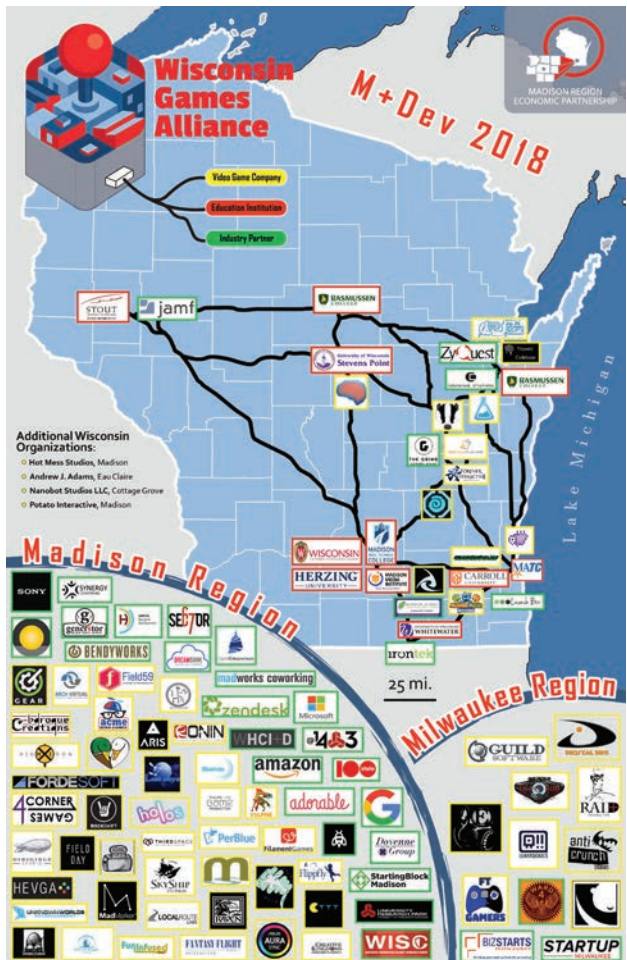
MadREP has been using its sector research to develop, create partnerships, and find financial investment for at least five CoEs, which include the Wisconsin Games Alliance (WGA), StartingBlock Madison (SBM), 100Crypto, the Center for Dairy Research (CDR), the Madison Public Market, and the Forward BIO Initiative.

WISCONSIN GAMES ALLIANCE

The WGA, an industry-based consortium created by MadREP and its industry partners in 2016, became a fully standalone Center of Excellence for the Midwest gaming industry in 2018.

WGA has grown tremendously since its founding and, for the last two years, its M+Dev conference has welcomed over 400 game developers, designers, students, and enthusiasts for a day of networking and learning.

MadREP and WGA completed implementation of a \$50,000 capacity grant from WEDC, allowing for a hired consultant to serve as the WGA Executive Director and assist in developing a business and financial plan for the WGA statewide. WGA developed a CoE blueprint in the Breaking the Code Report, authored by Tyler Krucas, Wisconsin Games Alliance & Craig Kettleson, Madison Region Economic Partnership.



CENTERS OF EXCELLENCE »

STARTINGBLOCK MADISON

SBM, a new 40,000+ SF information and communications technology (ICT) center of excellence opened on Madison's near east side in June 2018. MadREP served on the advisory board and co-authored a successful i6 grant application which provided \$500,000 to underwrite early staffing and programming costs. The Wisconsin Games Alliance was one of the first tenants. Being physically located at StartingBlock puts WGA and the Wisconsin game development industry in direct contact with many tech-oriented organizations and businesses daily. StartingBlock, and the other organizations housed there, provide a wide range of support services to the WGA and its members including talent recruiting, mentorship, and printing.

100CRYPTO

100Crypto is developing a national blockchain consortium effort inside of 100State's headquarters. Started by a pair of Bitcoin enthusiasts, 100Crypto builds the region's blockchain community through meetups, seminars, hackathons, and conference attendance. MadREP continues to support the legitimization of 100Crypto as a distinct CoE that will code blockchain solutions in support of the state's business and industries of significance. The asset for the CoE is intellectual human capital, rather than intellectual property.

CENTER FOR DAIRY RESEARCH (CDR)

The CDR broke ground on a \$47MM expansion project in September 2018. The facility will add 3,000 SF for new aseptic packaging equipment and 2,500 SF for a pilot plant designed to provide space to start up companies as part of an Entrepreneurial Food and Beverage Center. MadREP assisted the CDR with an application to the WEDC for designation as an agriculture, food and beverage (AFB) center of excellence, which includes a substantial investment over the next three years. The CDR also received a \$200,000 award from the WEDC to provide up to \$20,000 in equipment grants to individual businesses that successfully commercialize products developed in the center.

"MadREP has been invaluable in moving us forward as we've concepted and begun to build the Center for Dairy Research. Their assistance with our application to WEDC for the Center of Excellence designation and funding ensures we are able to acquire state-of-the-art technologies, create an incubation space, and build out the existing pilot plant to attract more companies in need of product development support."

- Vic Grassman, CECD, Technology Commercialization Manager, CDR

CENTERS OF EXCELLENCE »

MADISON PUBLIC MARKET

MadREP is continuing to work with the City of Madison on planning and funding for the repositioned Fleet Service Building that is slated to become the Madison Public Market in 2021. MadREP continues to play a key role in designing and funding the Food Innovation Center. Approximately 15,000 SF of the Public Market will be dedicated to the Food Innovation Center: a local food production, wholesale, and workforce training facility that will be a catalyst in driving Madison's growing food economy to its full potential.

FORWARD BIO INITIATIVE

The Forward BIO Initiative, launched in 2018 with the assistance of a \$750,000 award from WEDC, is a collaborative effort that offers comprehensive support of technological innovation and workforce development to effectively translate discoveries into commercial products and groundbreaking therapies in the emerging area of biomanufacturing, the advanced manufacturing of therapeutic medical devices, cells, tissues, or pharmaceuticals.



The City of Madison's soon-to-be-vacated Fleet Services Garage will be transformed into the Madison Public Market, which will open in 2021.

BUSINESS ASSISTANCE »

MADREP HAS PROVIDED BUSINESS TECHNICAL ASSISTANCE to over 32 start-up businesses this year, including:



American Provenance: MadREP assisted American Provenance with the review of its pitch deck for a new line of health and beauty products. The business recently closed on \$500,000 in equity from the Winnebago Seed Fund in Neenah.



Ab E Discovery: MadREP assisted Ab E Discovery with site selection and TIF review services for a new 25,000 sf bio-functional animal feed ingredient manufacturing plant in the City of Waterloo. The business spun out of research by Professor Mark Cook at UW-Madison.



Lost Boys: MadREP assisted two game industry veterans with the development and refinement of their business model for Lost Boys Interactive, a full-service game studio based in Madison. Titles the studio has worked on include Call of Duty, Rune, Rosetta Stone, and Game of Thrones.



Mobile Doorman: MadREP assisted this software app development company with talent recruitment efforts focused on increasing the business's workforce diversity. Mobile Doorman produces a mobile app that allows tenants to communicate property issues to landlords and managers online.



Phoenix: MadREP assisted Phoenix with its site search for a new 50,000 sf plant that manufactures neutron generators, and a 10,000 sf neutron imaging center that will be used to test parts primarily for the aerospace industry. The \$12M to \$15M project will be developed in the City of Fitchburg.



Slingshot VR: MadREP assisted Slingshot VR with the review of its pitch deck for a new full-scale content development and virtual reality production studio located in Sun Prairie. The first product will be used by athletes to improve performance.



Understory: MadREP assisted Understory with introductions to Madison property owners whom the business identified as ideal for the installation of a network of proprietary weather detection sensors throughout the city. The sensors are used to chart the intensity and movement of weather events through an area. The business was a gener8tor graduate and has raised \$17M through five rounds of equity financing.

ED 101

MadREP offers economic development training to elected officials through community summits and ED 101 seminars.

2014-2018 Delivered: Beaver Dam, Columbus, Deerfield, Dodgeville, Horicon, Mayville, McFarland, New Glarus, Poynette, Rio, Sun Prairie, Verona, Watertown, Waupun **2019 Targets:** Cambridge, Evansville, Fall River, Stoughton

TIF ASSISTANCE

MadREP has performed TIF analysis for six communities and businesses to help community leaders guide funding incentive assistance.

INSPIRE MADISON REGION

In 2018-19, MadREP continued the growth of Inspire Madison Region, a regional talent-development initiative. Inspire makes it possible for students in the Madison Region to connect via an interactive web-based platform to career coaches and local employers for experiential learning activities such as job shadowing, internships, and youth apprenticeships. In doing so, Inspire also provides an opportunity for companies to take an active role in building their future workforce by connecting with students.



During the past year, MadREP worked with other economic development regions across Wisconsin to help promote the availability of the Inspire software platform to students statewide, and to integrate the various regional implementations of the platform that had emerged after Inspire Madison Region was launched. The result was that students in the MadREP region now have access to career counselors and employers statewide who are looking to engage with middle and high school students.



Students in Madison Region with access to Inspire:

78,000+



Wisconsin employers using the Inspire Platform:

1,500+



Career-based learning activities students have access to at Madison Region employers:

2,000+

[State: 5,000+]



Number of Career Coaches statewide that Madison Region students have access to:

1,800+

LEADERSHIP & DIVERSITY »

MADREP IS COMMITTED TO weaving together the important conversations of leadership, diversity, and economic development. Since 2014, MadREP (in partnership with the Urban League of Greater Madison) has held the Madison Region Economic Development and Diversity Summit, in recognition that thriving regions across this country — those that we typically think of as top-tier — have embodied, embraced, and encouraged diversity in all its forms. The annual summit, which draws 500+ in attendance, has been recognized as a “best practice” by other regional economic development organizations across the country and by the International Economic Development Council (IEDC).

The annual summit, which draws 500+ in attendance, has been recognized as a “best practice” by other regional economic development organizations across the country and by the International Economic Development Council (IEDC).



The Madison Region Economic Development and Diversity Summit celebrates talent, opportunity, and growth.

LEADERSHIP & DIVERSITY »

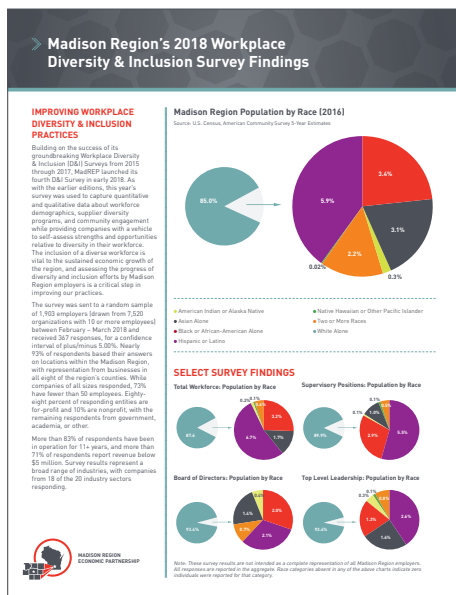
WORKPLACE DIVERSITY & INCLUSION SURVEY

MadREP has also been recognized for its annual Workplace Diversity & Inclusion Survey, which is used to capture quantitative and qualitative data about workplace demographics, supplier diversity programs, and community engagement. The instrument also provides companies with a vehicle to self-assess strengths and opportunities relative to diversity in their workplace. Sent to a random sample of employers across the region, individual responses are kept confidential and results are reported in the aggregate; enough surveys are collected to ensure statistically reliable results.

Selected highlights from the 2016-18 survey show:

- The percentage of organizations with a separate written diversity statement has increased since 2016, from 14% that year to 22% in 2018, indicating progress.
- The percentage of organizations with staff dedicated to diversity and inclusion efforts has shown a modest increase from 10% in 2016 to 15% in 2018, indicating progress.
- Since 2016 there has been a statistically significant increase in the percentage of organizations that have workforce demographic goals, from 11% in 2016 to 17% in 2018, further indicating progress.

At the time of this publication, the 2019 survey is still underway. The results of the most recently completed survey are available in the Research and Reports section of MadREP's website. See madisonregion.org/research.



NOTABLE PROJECTS THROUGHOUT THE REGION »

ABC Supply Co. • Expansion • \$30,500,000 • 250 jobs • Beloit, Rock County

Babcock Hall Dairy Plant & Center for Dairy Research (CDR) • Expansion • \$47,000,000 • Madison, Dane County

Badger State Maintenance • New • 5 jobs • Milton, Rock County

Badgerland Disposal • New • 30 jobs • Milton, Rock County

Basin Precision Machining • Expansion • \$13,300,000 • 30 new jobs • Jefferson, Jefferson County

Big R • New • 50+ jobs • Portage, Columbia County

Blackhawk Community Credit Union • New • \$30,000,000 • 50 jobs • Janesville, Rock County

BPI Wisconsin • New • 7-9 jobs • Watertown, Jefferson County

Cameca Instruments • Expansion • \$6,000,000 • Fitchburg, Dane County

CEI • New • 30 jobs • Edgerton, Rock County

Cobblestone Hotel • New • \$6,700,000 • 20 jobs • Janesville, Rock County

Dawn's Foods • Expansion • 50+ new jobs • Portage, Columbia County

Downtown Streetscape Improvements • Renovation • \$200,000 • McFarland, Dane County

Ebates • Expansion • 175 jobs • Beloit, Rock County

Electronic Theatre Controls (ETC) • Expansion • \$7,500,000 • 150 new jobs • Middleton, Dane County

Eurofins • New • \$40,000,000 • 400 jobs • Madison, Dane County

Exact Sciences • New • \$57,300,000 • 225 jobs • Madison, Dane County

FujiFilm CDI • Expansion • \$21,000,000 • 143 jobs retained • Madison, Dane County

Full Mile Beer Company & Kitchen | Loft at 132 • New/Redevelopment • \$3,600,000 • Sun Prairie, Dane County

Generac • New • 50 jobs • Janesville, Rock County

GOEX • Expansion • 20 jobs • Janesville, Rock County

Halverson Flooring Center • New • 5 jobs • Janesville, Rock County

Hilton Garden Inn • New • \$24,000,000 • Sun Prairie, Dane County

Hilton Home2Suites • New • \$12,000,000 • 20 jobs • Beloit, Rock County

Holiday Inn & Conference Center • New • \$15,000,000 • 20 jobs • Beloit, Rock County

Hotel Goodwin • New • 10 jobs • Beloit, Rock County

Hy Cite Enterprises Headquarters • New • 255 jobs retained • Middleton, Dane County

JCB Flavors • Expansion • 20 jobs over 3 years • Watertown, Jefferson County

NOTABLE PROJECTS THROUGHOUT THE REGION »

K & M Tire • New • 12-20 jobs • Portage, Columbia County
Kerry • New • 100 jobs • Beloit, Rock County
Legacy at Noel Manor • New • \$2,100,000 • Verona, Dane County
MacDon/Linamar • New • \$5,000,000 • 20 jobs • Sun Prairie, Dane County
Mallinckrodt Stratatech • Expansion • \$20,000,000 • 20 new jobs • Madison, Dane County
Mariotte TownPlace Suites • New • \$13,000,000 • 20 jobs • Janesville, Rock County
McHenry Apartments • New/Redevelopment • \$13,000,000 • Sun Prairie, Dane County
Miramont Behavioral Health • New • \$10,000,000 • 79 jobs • Middleton, Dane County
N1 Critical Technologies • New • 16 jobs • Janesville, Rock County
NaturPak Pet • New • \$20,000,000 • 100 jobs • Janesville, Rock County
Nobel Knight Games • New • \$2,200,000 • 30 jobs • Fitchburg, Dane County
Octopi Brewing Co • Expansion • \$10,000,000 • 10-12 new jobs • Waunakee, Dane County
Park 151 • New • \$30,000,000 • Sun Prairie, Dane County
Phoenix • New • \$13,000,000 - \$15,000,000 • 70-120 jobs • Fitchburg, Dane County
Promega Research and Development Facility • New • \$157,000,000 • 100 jobs •
Fitchburg, Dane County
Seal-Rite • New • \$16,000,000 • 84 jobs • Beloit, Rock County
SSI Technologies • Expansion • 20 jobs • Milton, Rock County
Sub-Zero Training Facility • Expansion • \$5,410,000 • Fitchburg, Dane County
Token Springs & Meadow View Elementary Schools • New • \$58,600,000 •
Sun Prairie, Dane County
United Alloy • Expansion • \$13,000,000 • 66 jobs • Janesville, Rock County
UW Chemistry Building • New • \$133,000,000 • Madison, Dane County
UW Med Flight • New • 3-5 jobs • Portage, Columbia County
VeloCity Mixed Use Bldg • New • \$5,100,000 • Verona, Dane County
Verona Area High School • New • \$149,600,000 • Verona, Dane County
Wieser Concrete • Expansion • 9 new jobs • Portage, Columbia County

993.1+ MILLION
IN CAPITAL EXPENDITURES



2,838+
JOBS

2018-2019 INVESTORS »

CORNERSTONE PARTNERS | \$50,000 AND OVER ANNUALLY



ANCHOR PARTNERS | \$25,000-\$49,999 ANNUALLY



SUSTAINING PARTNERS | \$10,000-\$24,999 ANNUALLY



SUPPORTING PARTNERS \$5,000-\$9,999 annually

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Cresa
CUNA Mutual Group
Gordon Flesch
Investors Associated, LLP
Kraemer Brothers, LLC
Kraus-Anderson
Michael Best & Friedrich LLP
Old National Bank
Quarles & Brady LLP
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UW Credit Union
Vogel Bros. Building Co.

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