

CHAPTER EIGHT: INTERGOVERNMENTAL FRAMEWORK

VIII. INTERGOVERNMENTAL FRAMEWORK

A. INTERGOVERNMENTAL CONTEXT

The Village is surrounded by the City of Madison on three sides. To the west of the Village, beyond Blackhawk Country Club, is single-family residential. State office and Hilldale Mall are to the southwest. Small retail and service establishments line University Avenue to the south, with medium-density and single-family residential further south. The University of Wisconsin Campus is to the east. Like the Village, the City of Madison has limited jurisdiction over University development.

According to the Wisconsin Department of Administration, the City's population as of 2008 was 226,650. The City of Madison is the seat of government for both the State and for Dane County. Historically, the City has played a very active role in local and regional planning, and has developed numerous detailed neighborhood plans to guide development at the neighborhood level.

Insights into the intergovernmental context for the Comprehensive Plan can be found in the plans of neighboring jurisdictions. These plans are important because they reflect attitudes toward growth, development and intergovernmental cooperation in communities that share common borders with the Village. These attitudes heavily influence the location, intensity and arrangement of activities that will impact the Village. They also help provide guidance for the planning of the community's edges so that the interface between land uses across municipalities can be effectively handled. Finally, the plans are also important since they help identify areas of common concern that communities, working together, may be better equipped to address.

Based on comments received during the public participation events and the Comprehensive Plan work sessions conducted by the Plan Commission, several of the issues foremost in the minds of Village residents are cross-jurisdictional in scope. These include: transportation, watershed/stormwater management, and development activities in the west campus area. All of these issues are beyond the Village's ability to effectively cope with by itself. The development of effective solutions to these issues will clearly involve concerted efforts on the part of all affected jurisdictions.

A review of existing plans by surrounding jurisdictions is provided later in this chapter.

B. EXISTING INTERGOVERNMENTAL COOPERATION EFFORTS

The Village already has a number of intergovernmental cooperation efforts. One of the most prominent is the Joint West Campus Committee, which is comprised of alders from Districts 5, 10, 11, and 13 in Madison, a representative from the Madison Mayor's office, a Madison Plan Commission member, a Madison transportation-related committee member, a representatives from the Regent, Dudgeon-Monroe, Greenbush, Sunset Village, and Vilas Neighborhood Associations, various UW and University Hospital representatives (including the head of UW's Facilities and Planning division), and the Shorewood Hills Village Administrator, Village President, and Village Board representative. The mission of the Joint West Committee is to:

- Facilitate participation in planning activities affecting the campus community, the City of Madison, the Village of Shorewood Hills and surrounding neighborhoods of the campus area west of Park Street;
- Identify community-wide and neighborhood impact of campus-initiated, city/village-related and private sector development projects in the west campus area;
- Discuss and summarize comments on university, city/village and private development plans, environmental impact/assessment statements and traffic analysis; Summarize city/village, campus and neighborhood comments that enhance existing commercial, university and residents areas and street, transit and bike/pedestrian systems in the west campus area.

The Village works with area municipalities in a variety of other ways:

- The Village is a member of a mutual aid agreement with many municipalities for provision of Fire and EMS services.
- The Village owns a landfill in conjunction with the City of Middleton and Village of Waunakee.
- The Village coordinates with adjoining/overlapping jurisdictions on infrastructure projects, such as working with the City of Madison and Dane County on University Avenue reconstruction.

C. EXISTING PLANS

1. CITY OF MADISON COMPREHENSIVE PLAN 2006

The City's Comprehensive Plan was adopted in January of 2006. The document comes in two volumes: Background Information and Goals, Objectives, Policies and Implementation Recommendations. Though there are opportunities for coordination and collaboration on a number of issues, this review focuses on land use and transportation policies and recommendations in Madison's plan.

The City's Generalized Future Land Use Plan shows the State Crime Lab and Department of Transportation parcels to the southwest continuing as employment districts, which are designated as "primarily office, research and specialized employment areas, and generally do not include retail and consumer service uses serving the wider community." A General Implementation Plan for the 21-acre Wisconsin Department of Transportation was approved by the City of Madison in August of 2007. The GIP allows for 1.6 million square feet of office space, 100,000 square feet of retail space, and 350 residential units. Buildings of up to 20 stories are allowed in certain parts of the development.

The Hilldale Mall area (Regent Street to University Avenue and Segoe Road to Midvale Boulevard) is designated as "Community Mixed-Use" (CMU) with a transit-oriented development (TOD) overlay. The CMU designation means that the area is recommended for "a relatively high-density mix of residential, retail, office, institutional and civic uses in a compact urban setting." The designation calls for buildings of more than one story in height, pedestrian-friendly design, and close-by transit service. The TOD overlay location is considered conceptual, but does "identify general locations where it is recommended that additional, more-specific minimum land use and design standards be applied." The plan provides a list of 13 standards that should be applied to

TODs, with even more specific recommendations for TOD “core areas.” The TOD designation for the Hilldale area builds off the excellent bus service along University Avenue and the potential for a commuter rail stop just north of the area, in the Village. The second phase of the redevelopment of Hilldale Mall has gone through several iterations, and was not finalized before the adoption of the Village’s Comprehensive Plan.

The completion of the Hilldale Mall redevelopment and the initiation of the redevelopment of the Department of Transportation and Crime Lab buildings will undoubtedly affect the Village. All three projects will bring more traffic and people to the area, and will likely increase the pressure for redevelopment of certain areas along University Avenue in the Village. It is imperative that transit options increase as redevelopment progresses in order to provide alternatives to driving residents and employees who will be new to the area.

The rest of the Madison side of the University Avenue corridor is also shown as CMU, with primarily low-density residential (with some medium-density residential) just south of University Avenue. While the generally small parcels and limited lot depth along the south side of University Avenue make intense redevelopment unlikely, there is the potential for high-rise mixed-use close to the Village just south of Campus Drive in the “old” University Avenue corridor. Future land use designations, as described and mapped in the City of Madison Comprehensive Plan, are shown on Map 8-1.

The Madison Comprehensive Plan’s discussion of transportation issues focuses on providing alternatives to car travel, coordinating transportation improvements with redevelopment projects, encouraging TOD areas, coordinating with various entities on regional transportation issues, and making use of Transportation Demand Management (TDM) to limit traffic, among other things. Plans for commuter rail and express bus generally mirror Transport 2020 recommendations. The City does recommend extending the current bicycle route that runs through the Village along the rail line all the way from Middleton to the current Southwest Trail between Regent Street and Park Street.

2. U.W. CAMPUS MASTER PLAN 2005

The Village is bounded on the east by the 900-acre University of Wisconsin campus. Discussions with Village staff and community residents suggest that joint planning with University is a priority. Such planning is made more critical given that a significant portion of the far west campus area is actually in the Village. The planned expansion of the larger West Campus area – and area that includes the UW Hospitals, clinics and research facilities – however, is an ongoing concern in the Village. The variation in the scale, intensity and character of development along the common border between the Village and the campus creates a “hard edge” between them. Even though the UW has capped parking, much of the traffic capacity of University Bay Drive has already been taken up by UW expansions, leaving little capacity for potential redevelopment in the along Marshall Court in the Village.

The most recent planning effort undertaken by the UW is the 2005 Campus Master Plan. The theme for the Master Plan was “recreating ourselves in place.” It includes additions

to the UW Hospital, including replacement of the Clinical Science Center parking ramp with a primarily below-grade ramp that has a green plaza-like roof. Other proposed West Campus structures include a West Campus Union, a new school of nursing building, a new parking garage (to replace Lot 60), and various other academic buildings. The major structure that is proposed for the Village is a medical office building just to the east of the Keystone House.

The Master Plan discusses West Campus transportation improvements as well. It specifies that the University will continue to provide its current number of parking spaces, while attempting to shift to utilizing structured parking over surface parking. Pedestrian and bicycle improvements are also recommended. Installation of bicycle lanes is shown for Highland Avenue, University Bay Drive, Walnut Street, and Observatory Drive. Improvements are recommended for the Highland Avenue ramps and University Bay Drive-University Avenue intersection. A potential overpass of University Avenue is shown at University Bay Drive.

Finally, the Master Plan shows many upgrades to Campus infrastructure – chilled water, steam, electrical, communications, and compressed air systems. Many of these improvements are in-progress as this Plan is being written, while others will continue after this Plan is adopted. Many of the UW Master Plan’s recommendations for the area adjoining the Village are shown on Map 8-1.

3. DANE COUNTY COMPREHENSIVE PLAN 2007

Dane County completed its Comprehensive Plan in October of 2007. Because cities and villages develop and implement their own Comprehensive Plans, the County’s Comprehensive Plan will not affect the Village as much as the City of Madison’s plan. A review of transportation issues included in the County’s Comprehensive Plan is contained in the Transportation chapter of this document. The full text of the County’s Plan is available on their website at www.daneplan.org.

4. METROPOLITAN AND REGIONAL PLANNING JURISDICTIONS

The Village of Shorewood Hills is located within the planning jurisdiction of the Capital Area Regional Planning Commission (CARPC). CARPC is the water quality management planning agency for Dane County. In coordination with the Wisconsin Department of Natural Resources, the CARPC has prepared water quality plans, and is regularly involved in the delineation of, and amendments to, urban service areas and environmental corridors. Because the Village is already fully developed with no opportunities for expansion, its interaction with CARPC is limited.

The Madison Area Metropolitan Planning Organization (MPO) provides transportation planning services to communities in the metropolitan area. The MPO’s Board is comprised of 14 appointees – six are appointed by the City of Madison Mayor, three are appointed by the Dane County Executive, three are appointed by small cities and villages in the MPO area, one is appointed by towns in the MPO area, and one is appointed by the Wisconsin DOT. The organization is staffed by transportation planning personnel from the City of Madison. Because the MPO deals with transportation projects of regional significance, the Village’s primary interaction with the MPO is on projects

related to the University Avenue corridor. Also, recent state government proposals for RTA enabling legislation have suggested that the MPO's boundaries be coterminous with newly created RTAs. Please refer to the Transportation Chapter earlier in this document for a discussion of MPO plans.

5. **PLANNING RELATED STATE AGENCIES**

District 1 of the Wisconsin Department of Transportation (WisDOT), serves all of Dane County. DOT plans are discussed in the Transportation chapter. The Wisconsin Department of Natural Resources (WisDNR) serves Dane County out of its offices in Fitchburg.

6. **MADISON METROPOLITAN SCHOOL DISTRICT (MMSD)**

The Shorewood Hills School has been a part of the Madison Metropolitan School District (MMSD) since 1962. Enrollment figures for 2008-2009 show that the District has a total of 11,363 elementary school students of which 410 attend the Shorewood Hills School as of the 2008-2009 school year. The District also has 5,178 middle school students, and 7,647 high school students. School enrollment and statistics are covered in more detail in the Economic Development chapter.

7. **METRO TRANSIT (METRO)**

Although transit service no longer extends into the interior of the community, service to the Village is still provided along several Metro routes along University Avenue. Transit is further discussed in the Transportation chapter.

D. GOALS, OBJECTIVES AND POLICIES

1. **GOAL:** *Increase discourse and cooperation with surrounding units of government.*

OBJECTIVES:

- a. Resolve drainage/stormwater problems through intergovernmental planning and cooperative agreements.
- b. Manage the volume and speed of pass through traffic in the Village by working with the City of Madison and UW to explore transportation alternatives.
- c. Work with the UW and UW Hospital to ensure that any proposed new UW or UW Hospital buildings will result in minimal impact to the Village.
- d. Continue to support formation of a Regional Transportation Authority.

POLICIES:

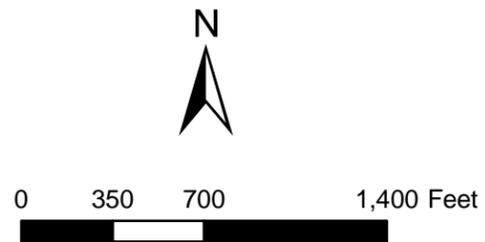
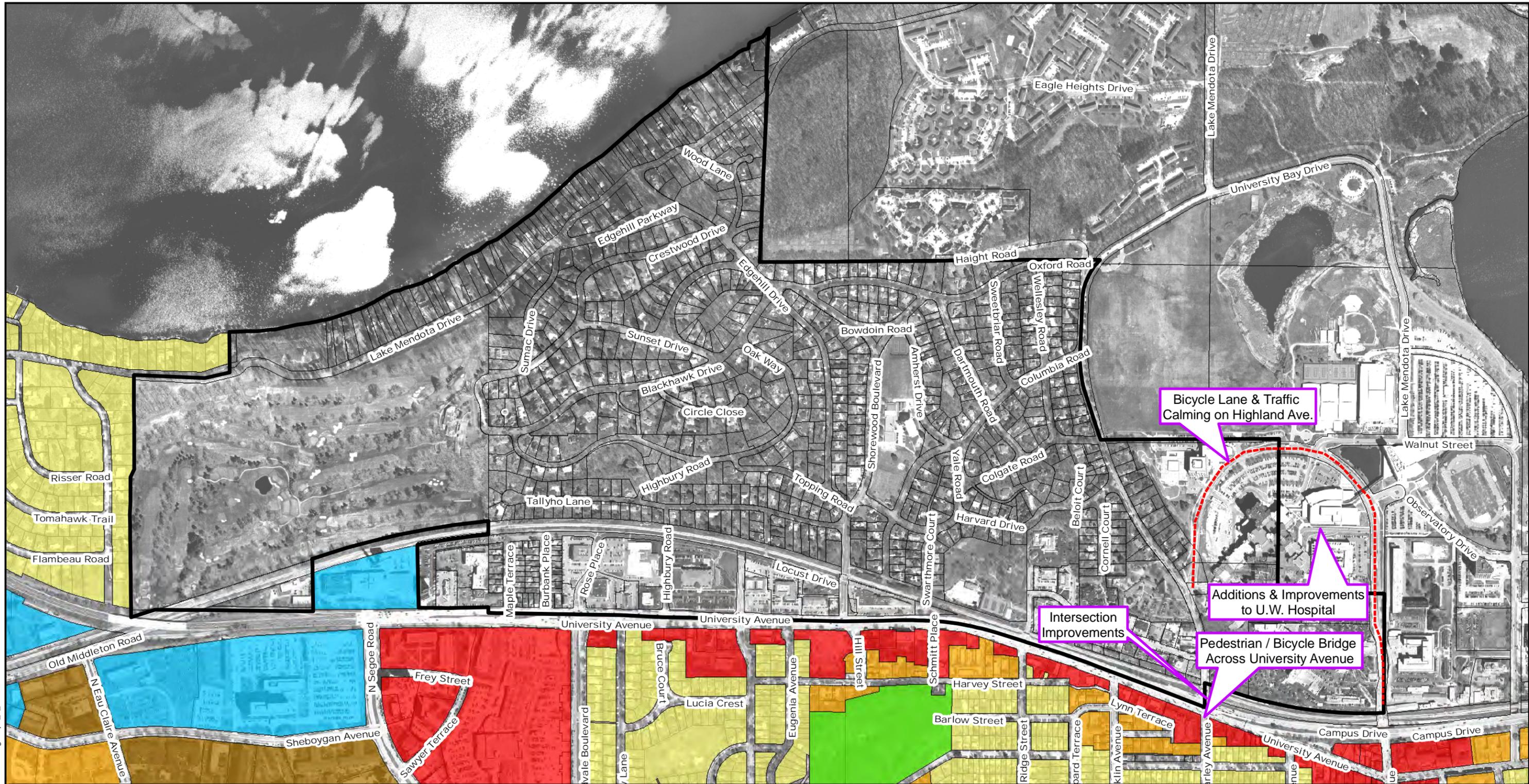
- a. Seek out areas for cross-jurisdictional cooperation and cost-sharing without sacrificing Village autonomy.
- b. Request that surrounding jurisdictions contribute their fair share toward mitigating development impacts that have a disproportionate affect on the Village.

E. RECOMMENDATIONS

- Work with the Veteran's Administration, State of Wisconsin, City of Madison, and the UW, as appropriate, to devise a reuse/redevelopment plan for the any government/institutional properties in and around the Village should properties be slated for closure/redevelopment.
- Work with UW to execute a memorandum of understanding limiting or preventing acquisition of further property within the Village by the University.
- Continue participating in the Joint West Campus Area Committee as a way to stay informed on events in areas surrounding the Village, and keep other jurisdictions informed of Village activities.

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Data Sources:
 Dane County Land Information Office
 City of Madison Comprehensive Plan
 UW Master Plan

Legend

- Residential - Low Density (0-15 units per acre)
- Residential - Medium Density (16-40 units per acre)
- Residential - High Density (41-60 units per acre)
- Community Mixed Use
- Employment
- Parks / Open Space
- Abcd U.W. Master Plan Recommendations

Village of Shorewood Hills Boundary

* All surrounding area plan land uses from City of Madison Comprehensive Plan

Map 8-1
Surrounding Area Plans
 Village of Shorewood Hills
 Comprehensive Plan

October 15, 2009



CHAPTER NINE: ECONOMIC DEVELOPMENT

IX. ECONOMIC DEVELOPMENT

A. INTRODUCTION

When implemented properly, economic development creates jobs, raises income levels, diversifies the economy and improves the quality of life, all while protecting the environment. There are many dimensions to economic development. One important dimension is opportunity for employment and income for a community's residents. Another is the formation, attraction and expansion of businesses and enterprises that create wealth. It is the application of individual talent, skills, and experience within an organized economic system that creates personal and community wealth, which, in turn, directly impacts the quality of life within a community.

The economic development element of a Comprehensive Plan explores the relationship between economic activity and land use. Through the vision, goals, and objectives of this element, the Village establishes guidelines for making decisions about where economic activity may occur, what types of economic activity are acceptable within the community, what constraints should be imposed on economic activity for the benefit of the community, and how the community should be involved in promoting development of appropriate types of economic activity.

B. EXISTING ECONOMIC PROFILE

The University Avenue corridor has been a catalyst for Village business development since its annexation in 1957. In the past 50-plus years major sections of the corridor have redeveloped, following the intensive urbanization of the central Isthmus. This trend is continuing with projects like 800 University Bay Drive along Marshall Court. Generally, each round of redevelopment has been met with a corresponding increase in development intensity. This has changed the urban form of the University Avenue corridor and has raised concerns over traffic and community character.

1. SCHOOL ENROLLMENT & EDUCATIONAL ATTAINMENT

2008-2009 enrollment at Shorewood Elementary School was 410 students, down 27 percent from the post-1990 peak of 565 in 1993. The Shorewood Elementary attendance area includes the Village and the UW's Eagle Heights apartment complex. Eagle Heights contains 1,044 one- two- and three-bedroom apartments for student families, academic staff/faculty families, and graduate students. Only 29.8 percent of the school's population lives in the Village – 46.6 percent live in UW housing, and 97 students (23.7 percent) come from outside the school's official attendance area.

Table 9-1 shows other statistics regarding Shorewood Elementary. A slight majority of the school's students are white, with a large Asian population that is mainly attributable to Eagle Heights. The school's percentage of white students is at the district-wide average, while the percentage of Asian students are far above the district average of 11 percent. Shorewood Elementary has a lower number of black students and Hispanic students than the district average (24 percent and 17 percent respectively). The school does have a higher percentage of students that are considered "English Language Learner Status" (not yet fluent in English) – 31 percent versus the district average of 16 percent.

Madison Metropolitan School District projections show enrollment at Shorewood Elementary attendance rising over the next five years, though at a decreasing rate. The District estimates that attendance will increase from the current enrollment of 410 students to 470 students in the 2013-2014 school year – 14 percent more students than the current year. This number is still well under the school’s 1993 attendance peak.

Shorewood Elementary has eight percent of its student population in Special Education classes, which is half the district average. 31 percent of students are from low-income families, compared to a district average of 45 percent.

Table 9-1: Shorewood Hills Elementary School – Student Body Demographics 2008-2009 Academic Year

	Kinder- garten	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Totals	Percent of Total
Live in Shorewood Hills	19	24	22	19	21	17	122	29.8%
Live in UW housing	38	44	29	30	25	25	191	46.6%
Live outside attendance area	29	13	17	12	12	14	97	23.7%
Class Totals	86	81	68	61	58	56	410	100.1%*

	Native American	Black	Hispanic	Asian	White
% Enrollment by Race	1%	7%	7%	34%	51%

Enrollment Projections	Kinder- garten	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Totals	Percent Increase
2009-2010	81	74	80	74	64	58	431	4.6%
2010-2011	84	80	73	77	74	62	451	4.6%
2011-2012	83	83	79	71	77	72	464	2.9%
2012-2013	84	82	82	76	70	75	469	1.1%
2013-2014	83	83	81	79	76	69	470	0.2%

*Not 100% due to rounding.

Note that enrollment statistics on the first chart are directly from the school on 2/5/09, not the official third Friday in September count, which was 412 students. All other statistics are from the District’s official count.

Source for all Shorewood Elementary data and School District Data: Madison Metropolitan School District.

Table 9-2 shows the educational attainment of Shorewood Hills residents over the age of 25, comparing the community to others in the area, as well as Dane County and Wisconsin. The Village has over eight times the state percentage of persons with a graduate or professional degree, and nearly four times the state percentage of persons with a bachelor’s degree. Nearly 100 percent of the Village has a high school degree (or equivalent), and 81.8 percent has a bachelor’s degree or better. The Village’s high level of educational attainment can be attributed to the influence of the adjacent University of Wisconsin campus, as well as its high home values, which necessitate the greater earning power of a college degree.

Table 9-2: Comparison of Village of Shorewood Hills Educational Attainment with Surrounding Communities, Dane County, and the State of Wisconsin

	Shorewood Hills	V. Maple Bluff	City of Middleton	City of Madison	Dane County	WI
Less than 9th grade	0.0%	1.3%	1.9%	2.9%	2.9%	5.4%
9-12 grade, no diploma	0.5%	0.8%	3.1%	4.7%	4.9%	9.6%
High school grad.	6.6%	6.2%	14.2%	18.1%	22.3%	34.6%
Some college, no degree	8.0%	10.0%	21.2%	18.5%	20.3%	20.6%
Associate degree	3.1%	4.3%	9.3%	7.7%	8.9%	7.5%
Bachelor's degree	22.1%	38.9%	29.1%	27.3%	24.8%	15.3%
Grad. or Prof. degree	59.7%	38.5%	21.2%	20.9%	15.8%	7.2%
% HS grad. or higher	99.5%	97.8%	95.0%	92.4%	92.2%	85.1%
% BA degree or higher	81.8%	77.4%	50.3%	48.2%	40.6%	22.4%

Source: Census 2000. Statistics are for residents over the age of 25.

2. INCOME

Along with high levels of education, Village residents have higher-than-median incomes, as shown in Table 9-3. At over \$122,000, the Village of Shorewood Hills has the highest median household income in Dane County and the third highest in the entire state (2000 Census). In Middleton, Madison, Dane County, and the state as a whole, the most common household income range was \$50,000 to \$74,999; for Shorewood Hills it is \$200,000 or more. The Village has a median household income of more than double that of all listed entities, except the Village of Maple Bluff.

Table 9-3: Comparison of Village of Shorewood Hills Household Income Levels with Surrounding Communities, Dane County, and the State of Wisconsin

Income Level	Shorewood Hills	V. Maple Bluff	City of Middleton	City of Madison	Dane County	WI
Less than \$15,000	4.6%	2.0%	8.3%	15.6%	11.2%	12.9%
\$15,000 to \$24,999	3.2%	4.7%	11.3%	12.0%	10.7%	12.7%
\$25,000 to \$34,999	1.3%	4.2%	13.0%	13.0%	11.8%	13.2%
\$35,000 to \$49,999	9.6%	7.8%	16.4%	17.8%	17.1%	18.1%
\$50,000 to \$74,999	13.3%	9.6%	20.6%	20.5%	23.4%	22.7%
\$75,000 to \$99,999	7.2%	15.3%	12.9%	10.4%	12.8%	10.9%
\$100,000 to \$149,999	22.8%	20.4%	11.4%	7.3%	8.8%	6.4%
\$150,000 to \$199,999	11.4%	12.5%	3.4%	1.8%	2.1%	1.5%
\$200,000 or more	26.6%	23.5%	2.6%	1.5%	2.1%	1.5%
Median HH Income 2000	\$122,879	\$111,400	\$50,786	\$41,941	\$49,223	\$43,791
Median HH Income 2008	\$151,757	\$137,580	\$62,721	\$50,991	\$60,790	\$50,578

Source: Census 2000, except for 2008 Median Household Income, which is from www.citydata.com.

3. LABOR FORCE CHARACTERISTICS

61 percent of Village residents over the age of 16 are classified as active participants in the labor force as of the 2000 Census. Only 0.3 percent were reported as unemployed.

The vast majority of Village workers (83.6 percent) are employed in management or professional occupations. Looking at employment by industry (Table 9-4), the dominant influence of the UW and State government in the regional economy results in over 55 percent of Village workers being employed in the fields of education, health care, and social services. No other category has over 10 percent of the labor force.

Table 9-4: Occupational Characteristics of Village Residents

Occupational Group	# Workers	Percent
Agriculture/forestry/fishing/hunting/mining	0	0.0%
Construction	22	2.8%
Manufacturing	37	4.7%
Wholesale trade	5	0.6%
Retail trade	65	8.3%
Transportation/warehousing/utilities	7	0.9%
Information	37	4.7%
Finance/insurance/real estate/rental & leasing	45	5.7%
Professional/scientific/mgt/administrative	47	6.0%
Educational/health/social services	435	55.3%
Arts/entertainment/rec./lodging/food serv.	25	3.2%
Other services (except public administration)	17	2.2%
Public administration	45	5.7%

Source: Census 2000

Table 9-5 compares the class of worker (public sector, private sector, self-employed) between the Village and other municipalities. According to the 2000 Census, just under 50 percent of Village workers are classified as government workers, 43 percent are in the private sector, and seven percent are self-employed. All other municipalities shown have between 22 percent and 29 percent of their workers in the government sector, with the state average at 12.5 percent. The influence of the UW and state government is especially high on the Village, though it is still apparent in Maple Bluff, Middleton, Madison, and Dane County as a whole.

Table 9-5: Comparison of Village of Shorewood Hills Class of Worker with Surrounding Communities, Dane County, and the State of Wisconsin

Class of Worker	Shorewood Hills	V. Maple Bluff	City of Middleton	City of Madison	Dane County	Wisconsin
Private Sector	43.6%	67.7%	73.1%	67.0%	71.0%	81.1%
Government	49.4%	22.4%	21.8%	28.5%	23.5%	12.5%
Self-Employed	6.7%	9.5%	5.1%	4.4%	5.3%	6.1%
Unpaid Family Workers	0.3%	0.4%	0.0%	0.1%	0.2%	0.3%

Source: Census 2000.

4. COMMUTING PATTERNS

Tables 6-1 and 6-2 in the Transportation chapter show the Village’s mode of commuting and commuter flow to (and from) the Village, respectively. The Village has a much lower rate of car use than the City of Madison, City of Middleton, or Village of Maple Bluff. The Village also has many more jobs than residents of working age; in fact, it has more jobs than residents, period. As part of a much larger metropolitan area, there is a lot of interaction between the Village and the City of Madison in terms of commuter flow. More Village residents work in Madison than the Village, and the majority of people who work in the Village live in the City of Madison. This exchange of commuters shows how closely integrated the Village is to the regional economy.

5. PROPERTY VALUES

The Wisconsin Department of Revenue maintains a database of assessed property values for every taxing jurisdiction in the state. This database is a valuable resource for analyzing local economies. The total assessed value is an indicator of the balance of development within a municipality, and, therefore, how much property tax burden each sector has. The per-capita rate of property assessment suggests that a lower tax rate is possible to provide the same amount of services. Table 9-6 shows both the dollar amount of assessments for the Village by property class and the percentage of each property class for the Village and other municipalities.

Table 9-6: Comparison of Village of Shorewood Hills Property Values with Surrounding Communities and Dane County

Property Class	Shorewood Hills		V. Maple Bluff	City of Middleton	City of Madison	Dane County
	\$ Value	Percent				
Residential	\$384,399,676	85.0%	98.5%	59.1%	67.4%	72.1%
Commercial	\$67,757,593	15.0%	1.5%	37.0%	31.3%	24.3%
Manufacturing	\$0	0.0%	0.0%	3.9%	1.3%	1.7%
Agricultural	\$0	0.0%	0.0%	0.0%	0.0%	0.2%
Undeveloped	\$0	0.0%	0.0%	0.0%	0.0%	0.1%
Ag. Forest	\$0	0.0%	0.0%	0.0%	0.0%	0.2%
Forest	\$0	0.0%	0.0%	0.0%	0.0%	0.1%
Other	\$0	0.0%	0.0%	0.0%	0.0%	1.4%
Total	\$452,157,269	100%	100%	100%	100%	100%
Per Capita	\$266,131		\$269,652	\$145,555	\$95,915	\$102,601

Source: Wisconsin Department of Revenue Statement of Assessments 2008.

The Village has a very high per-capita assessed value, though it is slightly lower than the Village of Maple Bluff's. The Village property base has a higher percentage of commercial value than Maple Bluff, but not as high as Middleton or Madison. As a general rule it is beneficial to residential property tax payers to have more commercial property development on the tax rolls to share the overall property tax burden. Shorewood Hills is somewhat unusual in that it has a very high percentage of residential property value but still has a low tax rate (0.01609 equalized mill rate – the lowest of any Dane County city or village). The anomaly is mainly due to the Village's high residential property values, which allow the Village to have a low tax *rate* while still collecting enough taxes to fund the high level of services that residents expect. The City of Middleton (which has the second lowest tax rate for a city or village in Dane County) is an example of a municipality that has consciously boosted commercial development to lower the property tax burden on residents (tax rate comparison from the Wisconsin State Journal's 2009 Book of Business).

To the extent that the Village can continue to encourage redevelopment of its commercial property along University Avenue to higher-density, more valuable land uses, it will be able to keep the mill rate low for its residents.

C. EMPLOYMENT TRENDS AND FORECASTS

Official employment forecasts at the Village level are not available from the Census or State of Wisconsin. Statewide figures available through the Wisconsin Department of Workforce Development (DWD) indicate that statewide employment in the health care sector is projected to increase by 23 percent between 2006 and 2016 (the most recent projections available). Statewide employment projections are shown in Table 9-7. Other growth sectors include:

- Administrative, support, and waste management/remediation services (19.0 percent)
- Professional, scientific, and technical Services (18.0 percent)
- Management of companies and enterprises (12.7 percent)
- Finance and insurance (12.5 percent)

Table 9-7: State of Wisconsin Employment Projections by Industry Sectors 2006-2016

NAICS Code ¹	Industry Title	2006 Average Employment ²	2016 Projected Employment ²	2006-2016 Employment Change ³	2006-2016 Percent Change
62	Health Care/Social Assistance	352,370	433,790	81,420	23.1%
56	Admin/Support & Waste Mgt/Remediation	132,860	158,060	25,200	19.0%
54	Professional, Scientific, & Technical Services	95,810	113,080	17,270	18.0%
55	Management of Companies and Enterprises	41,510	46,800	5,290	12.7%
52	Finance and Insurance	133,210	149,800	16,590	12.5%
72	Accommodation and Food Services	223,570	249,270	25,700	11.5%
71	Arts Entertainment and Recreation	35,040	38,980	3,940	11.2%
48	Transportation and Warehousing	112,890	124,930	12,040	10.7%
81	Other Services (Except Government)	143,200	158,050	14,850	10.4%
23	Construction	127,140	139,870	12,730	10.0%
53	Real Estate and Rental and Leasing	28,070	30,750	2,680	9.5%
42	Wholesale Trade	120,920	130,000	9,080	7.5%
--	Self-Employed & Unpaid Family Workers	209,410	218,870	9,460	4.5%
61	Educational Services, Including State&Gov't ⁴	261,670	272,810	11,140	4.3%
51	Information	49,300	50,800	1,500	3.0%
--	Government	177,900	182,130	4,230	2.4%
44	Retail Trade	313,940	315,360	1,420	0.5%
31-33	Manufacturing	505,450	497,900	-7,550	-1.5%
21	Natural Resources and Mining	3,980	3,820	-160	-4.0%
22	Utilities	11,270	10,780	-490	-4.3%
--	Total, All Non Farm Industries	3,079,470	3,325,840	246,370	8.0%
--	Total, w/o Self-Employed & Unpaid Workers	2,870,060	3,106,970	236,910	8.3%

Source: Wisconsin Department of Workforce Development, Division of Workforce, Economic Advisors Wisconsin Projections 2006-2016

1: NAICS Code stands for North American Industry Classification System

2: Employment is rounded to the nearest ten. Numbers may not add due to rounding.

3: Employment count of jobs and not people.

4: Government includes tribal leaders

The statewide employment projection numbers contain some positives and negatives for the Village. The proximity of two major hospitals, a UW Health clinic, and many other medical-related businesses along Marshall Court means that the Village is well-situated to take advantage of the growth in the health care sector. White-collar management and finance jobs are also projected to

increase, which will benefit the Village's existing residents and also boost the desirability of its housing stock due to its location and all of the nearby amenities. However, government jobs are projected to have a very slow growth rate through 2016 (ranked 16th out of 20 sectors). As is apparent in Table 9-6, the Village depends heavily on government jobs. As other sectors increase in importance throughout the state as a whole and Dane County in particular, the Village may see more of its residents diversifying away from its traditional government-heavy employment.

Shorewood Hills is completely landlocked, so any growth in employment opportunities would occur only with redevelopment. As outlined in the Village's Doctor's Park Neighborhood Plan, which was adopted in January 2009, land along Marshall Court is planned for mixed-use redevelopment, including office space. Parcels likely to redevelop in the next 20 years (the two between 800 University Bay Drive and the Ronald McDonald house, plus the eight between University Bay Drive and the University Square shops) contain approximately 55,800 square feet of office space. If it is assumed that there is one job per 350 gross square feet and that the amount of office space triples, there would be about 320 new office jobs along Marshall Court.

Due to the governmental/ institutional makeup of the Madison area economy, the region has been remarkably resistant to economic downswings. Moreover, it is widely believed that the region's burgeoning biotech, medical research, and other "creative" sectors are expected to foster robust economic growth well into the future.

According to the Dane County Comprehensive Plan countywide employment in 2000 was 255,719. The plan predicts employment of 290,960 in 2010, 306,155 in 2020, and 324,823 in 2030. That is an increase of 27 percent from 2000 to 2030, and an increase of 10.4 percent between 2010 and 2030.

D. TYPES OF ECONOMIC ACTIVITY DESIRED

The public participation phase of the Plan revealed a desire for more community-serving businesses within the Village. That is, businesses that are geared toward more of a local than a regional market. Traffic, land use, and community character impacts generally associated with regionally oriented businesses, were cited as some of the main reasons for this preference. New retail and office jobs will primarily be contained in the Smart Growth redevelopment areas discussed in the Land Use chapter; the detailed neighborhood plans for the Pyare and Doctor's Park areas should be consulted for the types of development and business activity desired in those areas. New retail and office uses should fit well within mixed-use districts and minimize any disturbance of nearby residential areas. General office uses could include medical-related fields, professional and business offices, and the like. Retail and restaurant uses contained within redevelopment areas should be contained smaller storefronts that focus on community needs over attracting region-wide customers.

E. ENVIRONMENTALLY CONTAMINATED SITES ("BROWNFIELDS")

Sites with known or suspected environmental contamination are called "brownfields." The Wisconsin Department of Natural Resources (DNR) maintains a list of sites involving prior discharges of potentially hazardous agents triggering DNR investigations. The DNR's Bureau of Remediation and Redevelopment Tracking System (BRRTS) shows six sites within the Village that have had environmental contamination in the past. These sites, which listed in the table below, have involved only minor DNR activities and are not thought to pose an immediate hazard to persons or property. All of the sites are either closed or require no further remediation action. A chart of the sites is shown below.

The Village has a very small number of brownfield sites (Table 9-8). Because most of the sites are not in likely locations for major redevelopment, brownfield areas are not expected to be a major barrier to economic development or redevelopment.

Table 9-8: Shorewood Hills Brownfield Sites

Address	BRRTS Activity #	Activity Name	Activity Type
842 Highbury Rd.	02-13-001307	Ideal Vault Co	Petroleum Contamination - Soil & Groundwater
3770 University Ave.	02-13-262211	Flad Redevelopment	Dumping/Waste Disposal
3545 Lake Mendota Dr.	03-13-001335	Welch Property	Leaky Underground Storage Tank (Petroleum)
3441 Crestwood	03-13-001476	Norman Property	Leaky Underground Storage Tank (Petroleum)
4500 Old Middleton Rd.	09-13-293093	Blackhawk Country Club	Underground Storage Tank Closure
3326 Lake Mendota Dr.	09-13-544186	Arrietta Hastings Property	Tank Closure

Source: DNR BRRTS Database - <http://dnr.wi.gov/org/av/rr/brrts/index.htm>, accessed 2/27/09.

F. ECONOMIC DEVELOPMENT PROGRAMS

The total assessed valuation of Village property currently stands at approximately \$452 million (2008). Tax Increment Financing – where increases in property tax collections in a certain area are used to make infrastructure improvements in that area in order to spur development – is one of the most powerful tools that municipalities have to spur economic development. Since the late 1980s, the Village has used tax increment financing (TIF) to fund public improvements and new private investment along the University Avenue corridor to try and boost the Village’s commercial assessments. The Village’s original Tax Increment District (TID), established in 1987, helped fund various improvements in the area of the former Wisconsin Brick and Block Company on the near east side of the Village – an area now known as University Station. The original TID was retired in 1995.

In 1993 a second TID was established to fund public improvements within an area extending from Shorewood Boulevard on the east to just beyond Maple Terrace on the west. The district included the Village’s University Avenue frontage along that stretch and extended to the north side of the Wisconsin-Southern right-of-way. Tax increments generated in the district were used to finance various stormwater management and circulation improvements. The TID was closed at the end of 2006 – 15 years earlier than state statute required – returning \$43 million in increment to the property tax rolls.

In 2008 the Village created TID #3 in the Doctor’s Park area of the Village. This TID was created as a mixed-use TID, which has a maximum 20-year lifespan. The TID was created to fund street and infrastructure improvements to Marshall Court, University Avenue, and University Bay Drive, to be able to accommodate redevelopment of the corridor. The TID plan also budgeted funds for a bicycle path just north of the railroad tracks to connect the “missing link” between Shorewood Boulevard and the UW’s path that ends at University Bay Drive, among other projects. The Village is currently in the process of creating TID #4 in the Pyare area to assist in redevelopment of that area.

There are many other programs besides TIF that can assist in various aspects of economic development. A list of programs is shown below. Not all programs may be applicable to all projects – opportunities for utilizing state and federal programs must be analyzed on a project-by-project basis. Many state and federal programs focus on rural or agricultural issues; for obvious reasons, those programs have not been listed. Some programs that are listed are for economically struggling areas – it is likely that Shorewood Hills would not qualify for many of those programs, but it can depend upon how the term is defined within each grant.

1. COUNTY PROGRAMS

The **BUILD** (Better Urban Infill Development) Program provides grant funding to local municipalities to plan infill development and promote sustainability. Eligible activities include: preparation of infill development plans, facilitation of visioning sessions, facilitation of design workshops, stakeholder interviews, facilitation of public participation processes, preparation of ‘predevelopment’ activities, and implementation consultation. Funding varies from year to year. Grants require matching funds (20 percent for planning/facilitation, 50 percent for predevelopment).

Dane County **Community Development Block Grant** program aims to address three main priorities: address the need for affordable housing and reducing the homeless population, economic development for downtowns and commercial areas (with a focus on job creation), and providing community facilities and services for the elderly and low/moderate income youth and families. Approximately \$1.1 million was available in 2007. Because funds are typically distributed according to need, and the Village is high-income, acquiring funds through this program would not be likely.

The **American Dream Down Payment Initiative** (ADDI) is a small County program – 2007 funding was only \$18,400. The program offers assistance for down payment costs, assistance with closing costs, and assistance with home rehabilitation costs. Eligible individuals must be first-time homebuyers interested in purchasing single-family housing (including condominiums). Applicants must have incomes below 80 percent of the area’s median income.

The **HOME** program had a \$570,000 budget in 2007. Funding goes towards construction/rehabilitation of affordable housing (rental or owner-occupied), down payment assistance, and land acquisition. Eligibility depends upon the activity, but must be below 80 percent of the area’s median income in all cases.

2. STATE PROGRAMS

The **Wisconsin Department of Commerce (COMMERCE)** has a broad range of financial assistance programs to help communities undertake economic development. COMMERCE categorizes programs as Agriculture, Business, Environmental Cleanup, Individuals and Families, Local Government and Organizations (for and non-profit). This quick reference guide identifies these programs and selected programs from other agencies. COMMERCE maintains a network of Area Development Managers to offer customized services to each region of Wisconsin. For more information on COMMERCE finance programs contact: Kathy Heady, [Area Development Manager](#), (608) 266-9944, e-mail: Kathy.Heady@wisconsin.gov.

The **Brownfields Initiative** provides grants to persons, businesses, local development organization, and municipalities for environmental remediation activities for brownfield sites where the owner is unknown, cannot be located or cannot meet the cleanup costs.

The **Community-Based Economic Development Program (CBED)** is designed to promote local business development in economically-distressed areas. The program awards grants to community-based organizations for development and business assistance projects and to municipalities for economic development planning. The program helps community-based organizations plan, build, and create business and technology-based incubators, and can also capitalize an incubator tenant revolving-loan program.

The **Blight Elimination and Brownfield Redevelopment Program (BEBR)** can help small communities obtain money for environmental assessments and remediate brownfields. Contact Jim Frymark, Bureau Director, (608) 266-2742, e-mail: jim.frymark@wisconsin.gov

The **Community Development Zone Program** is a tax-benefit initiative designed to encourage private investment and job creation in economically-distressed areas. The program offers tax credits for creating new, full-time jobs, hiring disadvantaged workers and undertaking environmental remediation. Tax credits can be taken only on income generated by business activity in the zone. Contact Peggy Burke, (608) 266-3751, e-mail: Peggy.Burke@Wisconsin.gov or Todd Jensen, (608) 266-3074, e-mail: Todd.Jensen@Wisconsin.gov

The **Freight Railroad Preservation Program** provides grants to communities to purchase abandoned rail lines in the effort to continue freight rail service, preserve the opportunity for future rail service, and to rehabilitate facilities, such as tracks and bridges, on publicly-owned rail lines. Contact Frank Huntington, Bureau of Railroads and Harbors, (608) 267-3710, e-mail: frank.huntington@dot.state.wi.us

The **Minority Business Development Fund – Revolving Loan Fund (RLF) Program** is designed to help capitalize RLFs administered by American Indian tribal governing bodies or local development corporations that target their loans to minority-owned businesses. The corporation must be at least 51-percent controlled and actively managed by minority-group members, and demonstrate the expertise and commitment to promote minority business development in a specific geographic area. Contact the Bureau of Minority Business Development.

The **Customized Labor Training (CLT) Program** is designed to assist companies that are investing new technologies or manufacturing processes by providing a grant of up to 50 percent of the cost of training employees on the new technologies. The program's primary goal is to help Wisconsin manufacturers maintain a workforce that is on the cutting edge of technological innovation. Contact Kathy Heady, Area Development Manager, (608) 266-9944, e-mail: Kathy.Heady@wisconsin.gov

The Department of Commerce offers **Entrepreneurial Development Programs** which contains two types of grants. **Early Planning Grant (EPG)** allows applicants, who fall within particular industrial clusters, to hire an independent third party to help them prepare a comprehensive business plan. Although this program typically provides grants for 75 percent of eligible project costs up to \$3,000, there are limited funds available. **Entrepreneurial Training Program (ETP)** Is for entrepreneurs that would rather prepare their business plan in a more formal setting and for

those businesses that fall outside the identified Industrial Clusters, Commerce offers the ETP program. Under this program, applicants are provided with a grant to cover up to 75 percent of the tuition costs associated with enrolling in an approved course at their local Small Business Development Center (SBDC). For eligibility and industry cluster information please visit the Wisconsin Department of Commerce home page @ <http://www.commerce.state.wi.us/>.

The **State Infrastructure Bank (SIB) Program** is a revolving loan program that helps communities provide transportation infrastructure improvements to preserve, promote, and encourage economic development and/or to promote transportation efficiency, safety, and mobility. Loans obtained through SIB funding can be used in conjunction with other programs. Contact Dennis Leong, Department of Transportation, (608) 266-9910, e-mail: dennis.leong@dot.state.wi.us.

The **Wisconsin Transportation Facilities Economic Assistance (TEA) and Development Program** funds transportation facilities improvements (road, rail, harbor, and airport) that are part of an economic development project. Contact Dennis W. Leong, Department of Transportation, (608) 266-9910, e-mail dennis.leong@dot.state.wi.us.

The **Freight Railroad Infrastructure Improvement Program** awards loans to businesses or communities wishing to rehabilitate rail lines, advance economic development, connect an industry to the national railroad system, or to make improvements to enhance transportation efficiency, safety, and intermodal freight movement. Contact Frank Huntington, Bureau of Rails and Harbors, (608) 267-3710, e-mail: frank.huntington@dot.state.wi.us

The **Wisconsin Technology Zone Program** offers tax credit incentives to new and growing businesses in the state's high-technology sectors. High technology businesses planning to expand existing operations in a designated Technology Zone area, individuals planning to start a new business in a Technology Zone area or businesses considering relocation to a Technology Zone area from outside Wisconsin may be eligible for Technology Zone tax credits. For more information go to the Capital Ideas technology zone homepage at www.capital-ideas.org.

The **Waste Reduction and Recycling Demonstration Grant Program** helps businesses and local governing units fund waste reduction, reuse, and recycling projects on a pilot or demonstration scale. The applicant must provide evidence of having the technical ability, experience and financial support necessary to successfully carry out the project. Up to 50 percent of the total eligible project costs (not to exceed \$150,000) can be reimbursed. Contact Sandy Chancellor, Recycling Grant Manager, Wisconsin Dept. of Natural Resources, (608) 264-9207, e-mail: Sandra.Chancellor@wisconsin.gov.

3. FEDERAL PROGRAMS

There are a wide range of federal programs intended to foster economic development. A review of the "Catalog of Federal Domestic Assistance" was conducted to identify those programs most applicable to each of the communities. Each program is described below and includes the CFDA identified. Detailed program descriptions can be found at <http://cfda.gov>.

Brownfield Economic Development Initiative CFDA: 14.246, Agency: Housing and Urban Development (HUD)

Objectives: To return brownfields to productive use by assisting public entities eligible under the Section 108-Guaranteed Loan program carry out qualified economic development projects on brownfields authorized by Section 108(a) of the Housing and Community Development Act of 1974, as amended. Grant assistance must enhance the security of loans guaranteed under the Section 108 program or improve the viability of projects financed with loans guaranteed under the Section 108 program.

Bank Enterprise Award Program CFDA: 21.021, Agency: Treasury

Objectives: To encourage insured depository institutions to increase their level of community development activities in the form of loans, investments, services and technical assistance within distressed communities and to provide assistance to community development financial institution's through grants, stock purchases, loans, deposits and other forms of financial and technical assistance. The program rewards participating insured depository institutions for increasing their activities in economically distressed communities and investing in community development financial institutions.

Brownfield Assessment and Cleanup Cooperative Agreements CFDA: 66.818, Agency: Environmental Protection Agency

Objectives: To provide funding: (1) to inventory, characterize, assess, and conduct planning and community involvement related to brownfield sites; (2) to capitalize a revolving loan fund (RLF) and provide sub-grants to carry out cleanup activities at brownfield sites; and (3) to carry out cleanup activities at brownfield sites that are owned by the grant recipient.

Procurement Assistance to Small Businesses CFDA: 59.009, Agency: Small Business Administration

Objectives: To assist small business in obtaining a "fair" share of contracts and subcontracts for Federal governmental supplies and services and a "fair" share of property sold by the government.

Small Business Loans CFDA: 59.012, Agency: Small Business Administration

Objectives: To provide guaranteed loans to small businesses which are unable to obtain financing in the private credit marketplace, but can demonstrate an ability to repay loans granted.

Service Corps of Retired Executives Association CFDA: 59.026, Agency: Small Business Administration

Objectives: To use the management experience of retired and active business management professionals to counsel and train potential and existing small business owners.

Small Business Development Center CFDA: 59.037, Agency: Small business Administration

Objectives: To provide management counseling, training and technical assistance to the small business community through Small Business Development Centers (SBDCs).

Certified Development Company Loans (504 Loans) CFDA: 59.041, Agency: Small Business Administration

Objectives: To assist small business concerns by providing long-term, fixed-rate financing for fixed assets through the sale of debentures to private investors.

G. GOALS, OBJECTIVES & POLICIES

1. **GOAL:** *Achieve a mix of local businesses that offers conveniences for local residents, helps reduce automobile trips, and preserves both the character and tax base of the Village.*

OBJECTIVES:

- a. Attract businesses that serve community needs.
- b. Encourage additional mixed-use development in University Avenue corridor.
- c. Preserve the Village's tax base without sacrificing development quality.
- d. Retain locally owned, neighborhood-serving, businesses.

POLICIES:

- a. New commercial development should minimize off-site impacts.
- b. TIF-assisted development projects will be held to highest standards of site planning and design.
- c. Balance business needs with goals of the larger community.
- d. Promote land development practices that create synergies among local businesses

H. RECOMMENDATIONS

- Review and amend Village zoning ordinance in accordance with this Plan.
- Facilitate the development of a local business-owner association.
- Support the development of commuter rail transit.
- Encourage programmed activities among Village businesses – sidewalk sales, joint advertising, coupons (with purchase) redeemable at other Village businesses.