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Department of Community Development

ECONOMIC DEVELOPMENT BOARD

Tuesday, January 23, 2018

7:30 AM

North Conference Room

Agenda

- 1. Call to Order**
- 2. Approval of Minutes from November 29, 2017**
Request: Action
- 3. Business Outreach Plan**
Request: Discuss & Action
- 4. Staff Updates**
- 5. Announcements**
The next meeting is February 27, 2018 at 7:30 a.m.
- 6. Adjourn**

Dated: January 19, 2018

/s/ Timothy Carr, Chairman

Notice is hereby given that a quorum of other governmental bodies may be present at this meeting to present, discuss and/or gather information about a subject over which they have decision-making responsibility, although they will not take formal action thereto at this meeting.

Persons with disabilities requiring accommodations for attendance at this meeting should contact the City Clerk's Office at 262-236-2914, twenty-four (24) hours in advance of the meeting.

Any questions regarding this agenda may be directed to the Department of Community Development's Office at 262-236-2903, Monday through Friday, 8:00 AM – 4:30 PM



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Department of Community Development

ECONOMIC DEVELOPMENT BOARD

Tuesday, November 28, 2017

7:30 AM

North Conference Room

Minutes

1. Call to Order, Roll Call

2. Approval of Meeting Minutes from October 24, 2017

Mr. Spiora made a correction to the minutes to add Ald. Wirth as an attendee.

Chairman Carr made a correction to add “the” to a comment made by Ms. Rosenberg on page 4.

Action

Ald. Strzelczyk made a motion to approve the minutes with the corrections.

Ms. Rosenberg seconded the motion with corrections.

Voice vote was called; vote passed 6-0

3. Website Review

Chairman Carr stated that the EDB section of the city website is not easy to find the benefits and not easy to use.

Ms. Tollefson stated that she is not a fan of the EDB home page as there is not anything that grabs one’s attention. She feels that this section needs to be reorganized. She would like the strengths to be listed in bullet form. She feels that the mission statement should be more direct and should highlight the tools available as well as showcase some success stories. She stated that she feels that the home page should host the links to the other pages, like the tools that are available, so that they are easier to find.

Comments from the Board regarding the website:

- Home page – less words and more tabs to easily find tools and contacts (from a business owner perspective)
- Success stories – a new one listed every 6 weeks (would need 10 businesses ready to go)
- Business logos listed and links to business websites
- Correct the name of M-T School District
- “Reside Here” should be at the bottom of the list
- Work Force – education stat should be added
- Income level of the community stat should be added
- Strengths of Mequon: change the list around (fresh water should not be listed first). Highly educated workforce is important.

Attachment: 11.28.17 DRAFT (2924 : Minutes from November 29, 2017)

- Transportation tag line needs to be changed.
- Froedert and Children's Hospital need to be added in Top 10 businesses
- Tools – TIFs not listed but they should be.
 - o Examples of TIF recipients could be showcased.
 - o List the partners that are part of the TIF with the city.
 - o Contacts should be made available.
 - o Mention that a TIF can be customized.
 - o Include a map of each TIF district.
 - o Testimonials – show an old picture and a new one of a business that utilized the TIF
- List EDB members - especially that if they are part of the outreach group.

Chairman Carr asked that the Board be updated as changes are made.

Ms. Tollefson stated that the website is in constant motion and will continue to be updated and the Board will be informed as changes are made.

4. Outreach Program

Chairman Carr stated that the outreach program will be kicked off in 2018. The committee ambassadors will include Board members: Sipiora, Baka, Rosenberg and Safran.

There was discussion regarding which staff members will accompany the Board ambassadors to the business visits.

When asked about whether the Administrator Will Jones would be part of the outreach committee, Ms. Tollefson commented that in previous conversations it was indicated that he would not be regularly participating in the outreach.

Ald. Strzelczyk stated that it is part of the Administrator's job description to be part of the outreach efforts to the businesses.

Ms. Tollefson stated that a one page document will be created that the ambassadors can hand out to the businesses. The main goal is to listen to the businesses and to establish relationships.

It was decided that the ideal group would consist of:

- 1-2 Board ambassadors
- A representative from the Chamber of Commerce
- Alderperson from the district should be invited
- City representative (Administrator, Mayor or Ms. Tollefson)

Mr. Sipiora stated that he agrees that the main focus is to listen to the business owner. He feels that Ms. Tollefson plays a critical role in the outreach program. He suggested that notes be taken at each session, actionable items identified and a short summary should be made available to the Board after each visit.

There was discuss regarding the process of meetings and who should attend which meetings (the

initial meeting and the follow up meeting). Everyone agreed that a personal note should be sent from the alderperson following each business outreach meeting.

Ald. Strzelczyk stated that he feels that the alderperson should be involved throughout the process and not brought in halfway throughout the process. He suggested that during the initial phone call conversation to schedule the meeting, the question should be asked about the desire of the business owner of whom they wish to attend the meeting (Mayor, alderperson or only Board ambassadors). He said the role of the alderperson is to make the business feel welcome and to be a reference person but that the staff is best equipped to handle the daily issues.

Ms. Tollefson stated that she has a list that was previously created of topics for the outreach committee to cover.

Chairman Carr stated that another role of the outreach committee is to share all the exciting news about the city and everything that is available throughout the city with the businesses.

Ms. Tollefson asked the Board if they are interesting in hosting 1-2 focus groups in 2018 in addition to the outreach.

Ms. Rosenberg responded that she feels that this is a very important follow up tool and important in gathering more information from the businesses in the city.

Ald. Strzelczyk stated that he feels that a one page "Quick Reference" sheet would be very helpful to distribute to the businesses. He suggested that the city website address be listed with directions to specific areas of interest (EDB pages), other tools that are available, contact information of specific city staff and contact information for their alderperson.

Mr. Sipiora stated that he feels that the number of people attending each business visit should be limited and the intent is that the meetings are "probe sessions". He feels that a follow up by the Mayor or other city official may be appropriate based on feedback. He feels that a smaller group is more manageable and will be easier to get scheduled.

It was discussed that Telesmith will be the first business contacted for outreach as they have invited city officials and elected officials to visit their site.

Chairman Carr stated that at the January meeting the fact sheet should be available and a tentative schedule should be available; 1-2 visits a month. He feels that Ms. Tollefson should attend as she is most equipped to answer questions. He feels that meetings should be less than an hour and the relationship established is most important.

Ms. Tollefson stated that Kathleen Schilling from the Ozaukee Economic Development organization has done many focus groups and has offered to help this group customize a focus group and help facilitate that effort.

Ms. Tollefson stated that she will reach out to the new representative from the Mequon Pavilions to schedule a meeting for the first part of 2018.

She also stated that she would like to bring Barry Chavin back in sometime in 2018 and would like the Board to receive specific feedback regarding progress in the Mequon Business Park.

5. Staff Updates

Ms. Tollefson gave updates on projects and items that have recently been in front of the Planning Commission and Common Council.

Spur 16

- The city land has officially been sold to Cindy Schaefer. Staff has met with her team to ensure the process runs as smoothly as possible.
- The site will be mobilized in January and construction will start in February. The townhomes along Buntrock will begin first and then construction will work east to the commercial buildings. The entire process should take about 18 months.

Foxtown

- Have been approved by Planning Commission and will not be forwarded to Common Council until the traffic analysis report comes back (right of ways, on street parking, ingress and egress, etc.). Must ensure the traffic works for that site and the surrounding area.

Logemann

- The Mayor believes that the veto will stand.
- Lokre has submitted an offer to purchase. Their request for a partnership does not require the need to purchase the site. The offer was tabled at the November Common Council meeting.
- Lokre did not own the property until after the RFP was issued and submissions were due.
- Lokre has offered to partner with the city and financially contribute a minimum \$200,000 to tear down the building and to redesign the parking lot in a more efficient way and to add parking.

6. Announcements

The next meeting is January 23, 2018.

7. Adjourn

Action

Mr. Safran made a motion to adjourn.

Ms. Rosenberg seconded the motion.

Voice vote was called; vote passed 5-0

Ald. Strzelczyk left the meeting at 8:35 a.m.

Respectfully Submitted,

Kim Tollefson



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Office of Community Development

TO: Economic Development Board
FROM: Kim Tollefson, Director of Community Development
DATE: January 23, 2018
SUBJECT: Business Outreach

Background: The draft materials attached are the various elements requested by the Board for business outreach. The materials include the following:

- List and prioritization of businesses to visit.
- Economic Development Team.
- Action steps to follow for the business visit.
- A set of talking points and questions to utilize at the visit.

Staff Summary: Staff will provide an overview and gain direction from the Board for changes and direction on proceeding with visits.

Attachments:

Packet Attachments (PDF)

2018 Priority Outreach Visits

Business	Industry	Aldermanic District	Team	Visit Date
Per EDB Direction				
Rockwell Automation +	Relay and Industrial Control Manufacturing	Wirth		
Gen Met	Industrial Fabricating and Manufacturing	Wirth		
Telesmith *	Construction Machinery Manufacturing	Wirth		
Concordia University *	Colleges, Universities and Professional Schools	Gierl		
Brixmor/Pavilions +	Multi-tenant Commercial	Nerbun		
Metro Market	Supermarkets and Other Grocery	Gierl		
Per Largest Employer (250+)				
Mequon-Thiensville Public Schools *	Elementary and Secondary Public Schools	Bushee		
Lokre Companies (MTC 1)	Mixed Use	Bushee		
Outpost Natural Foods	Supermarkets and Other Grocery	Mayr		
Rockwell Automation *	Relay and Industrial Control Manufacturing	Wirth		
Telesmith Inc. *	Construction Machinery Manufacturing	Wirth		
HB Performance Systems Inc.	Motor Vehicle Brake System Manufacturing	Wirth		
Aurora Advances Healthcare Inc. *	Offices of Physicians	Wirth		
Gateway Plastics	Manufacturing	Wirth		
Gen Met	Industrial Fabricating and Manufacturing	Wirth		
SPI Lighting	Industrial Commercial Lighting	Wirth		
Concordia University *	Colleges, Universities and Professional Schools	Gierl		
Columbia St. Mary's *	General Medical and Surgical Hospitals	Gierl		
Metro Market	Supermarkets and Other Grocery	Gierl		
Newcastle Place	Continuing Care Retirement Communities	Gierl		
East Towne	Multi-tenant Commercial	Hawkins		
River Centre	Multi-tenant Commercial	Hawkins		
River Site	Multi-tenant Commercial	Hawkins		
Ace Hardware	Hardware	Hawkins		
Steins Garden Center	Garden Center	Schneider		
Concord Development	Residential and Commercial Developer	Nerbun		
Sendiks	Supermarkets and Other Grocery	Nerbun		
East Towne	Multi-tenant Commercial	Nerbun		
Brixmor/Pavilions	Multi-tenant Commercial	Nerbun		
Cycle Bar	Fitness Center	Nerbun		

Top 10 Property Value (+)

Largest Employee 250+ ()*

Attachment: Packet Attachments (2926 : Business Outreach)

Top Properties by Assessed Value

Newcastle	Continuing Care Retirement Communities	Gierl		
Brixtor / Pavilions	Multi-tenant Commercial	Nerbun		
Rockwell Automation	Relay and Industrial Control Manufacturing	Wirth		
MTC 1	Mixed Use	Bushee		
Advanced Healthcare	Offices of Physicians	Wirth		
Bats Sports Academy	Industrial	Nerbun		
St. Mary's Hospital of Milwaukee	General Medical and Surgical Hospitals	Gierl		
St. Mary's Hospital of Milwaukee	General Medical and Surgical Hospitals	Gierl		
Children's Hospital of Wisconsin	General Medical and Surgical Hospitals	Hawkins		
Highlands at Riverwalk LLC	Residential	Hawkins		

Top 10 Property Value (+)

Largest Employee 250+ ()*

Team A: Kim, Tim + Mayor or City Administrator

Team B: Kim, Tim + 1 EDB Ambassador:

EDB Ambassadors: Jim Baka - Institutional
Bruce Sipiora - Industrial
Jon Safran - Commercial

2018 Priority Outreach Visits

2 Weeks			4 Weeks		3 Months	
Thank You Letter	Review Visit & Comments Received	Data Entry Summarizing Visit	Notify Alderperson, Mayor, City Administrator of Business's Needs	City Response & Follow Up to any Specific Need with Business	Executive Summary of Visits	Send Progress Report of any Action By City

Attachment: Packet Attachments (2926 : Business Outreach)

BUSINESS VISITATION SAMPLE:**Necessary Information:**

1. Interview Date
2. Company Name
3. Phone Number
4. Address
5. Contact Name/Title
6. Interview conducted by
7. Type of Business
8. SIC Code

Introduction/Purpose:

Introduction by interviewers to state purpose of visit – should be standardized:

1. Retention is the foundation for a healthy local economy, we would like to evaluate and determine how we can help strengthen and grow our businesses and commercial development

Options for Questions:

1. Describe your business, its mission, operations and top products/services.
2. How long has the business been in Mequon?
3. Number of employees on site in Mequon?
4. Does your company own or lease space in Mequon? If lease, when does it expire?
5. Do you have other locations – relationship between locations?
6. What percent of your production occurs in Mequon?
7. What markets does your business serve: local, county, state, national, international?
8. During the past 3-5 years, has the local branch Increased, Decreased or No change in the following:
 - Sales/Business
 - Employment
 - Facility
 - Equipment
 - Product/Service
 - Location
9. We would like to know more about your opportunities for growth and if any are anticipated in the next 1-3 years:

- Expanding employment
 - Expanding sales
 - Expanding building / site
 - Investing in equipment
 - Expanding product or services
 - Increasing customer base
 - Any expansion or increase, in which areas, in the past 3 years
10. Does your company anticipate a need to reduce or phase out your Mequon operations?
 11. Is your company considering plans to relocate? Within or outside Mequon? If so, where/why?
 12. Is your company considering plans to close or sell your business or sell just the Mequon location? If so, why?
 13. Are regulatory factors affecting business operations?
 14. Has there been a recent change in management or is one pending?
 15. Is the company having difficulty retaining or attracting employees with adequate skills? If so, what factors contribute to this difficulty?
 16. Is your employment status hiring, stable or downsizing?
 17. Is the company experiencing problems with security or safety -- others to list like environmental issues, marketing, transportation, infrastructure, financing, decrease in customer base, regulatory pressures, training? OR

Does the company need assistance to keep and grow business in Mequon? List could include: financing, additional space, new use for a surplus of space, resolve issue with city approvals, permits, etc., traffic/parking, etc...
 18. Are there additional industries or other support services that you feel are needed in the area?
 19. Please describe the most critical issue currently facing your company?
 20. Is Mequon a positive location for your business at its future opportunities? Yes/No and why or why not?
 21. What can the City do to enhance your company's effectiveness or profitability in Mequon?
 22. What recommendations do you have for improving the business climate or quality of life in Mequon?

23. What are the greatest advantages (at least two) of operating your business in Mequon?
24. What are the greatest disadvantages (at least two) of operating your business in Mequon?
25. Would you like to participate in a possible focus group?

Participants:



Attachment: Packet Attachments (2926 : Business Outreach)

MEQUON HELLO

ROLL OUT THE WELCOME HAT

The City of Mequon's Economic Development team priorities are....

MEQUON HELLO

ROLL OUT THE WELCOME HAT

Tax Increment Financing Districts

Revolving Loan Fund Program

Industrial Revenue Bonds

Business Loans

Partnership Opportunities:

Wisconsin Economic Development Corporation
 Southeastern Wisconsin Regional Planning Commission
 Milwaukee 7 Regional Development
 Ozaukee County Economic Development Corporation
 Mequon-Thiensville Chamber of Commerce
 Concordia University of Wisconsin
 Milwaukee Area Technical College

Infrastructure:

Interstate 43
 We Energies
 City Water

CONTACT US TO LEARN MORE ABOUT WHAT PROGRAMS CAN HELP

City of Mequon

Kim Tollefson

Development Director:
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ktollefson@ci.mequon.wi.us

Tim Carr

Economic Development
Board Chair:

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Mequon-Thiensville
Chamber of Commerce

262.512.9358

info@mtchamber.org



CITY OF MEQUON

Community Economic Profile



Population

	City of Mequon	Ozaukee County	Wisconsin
Median Age	46.7 years	43.0 years	38.5 years
Male	48.7%	48.9%	49.6%
Female	51.3%	51.1%	50.4%

Source: US Census Bureau, 2008-2012 American Community Survey

Population Growth (1970-2010)

Year	City of Mequon	Ozaukee County	Wisconsin
1970	12,150	54,461	4,417,731
1980	16,193 (33.3%)	66,981 (23.0%)	4,705,767 (6.5%)
1990	18,885 (16.6%)	72,831 (8.7%)	4,891,769 (4.0%)
2000	22,643 (19.9%)	82,317 (13.0%)	5,363,675 (9.6%)
2010	23,132 (2.2%)	86,395 (5.0%)	5,686,986 (6.0%)

Percent population change is shown in parentheses.

Source: US Census Bureau, Decennial Census

Taxes

2013 Local Property Taxes:

City of Mequon	
Assessment Ratio	1.0984
Net Rate/\$1,000	
Within the Mequon-Thiensville School District	\$15.50
Within the Cedarburg School District	\$14.84

Source: Ozaukee County Treasurer's Office

Households

	City of Mequon	Ozaukee County	Wisconsin
Total Households	8,934	34,093	2,286,339
Avg. Household Size	2.53	2.50	2.42
Total Families	6,633	24,344	1,476,851
Avg. Family Size	2.97	2.99	2.99

Source: US Census Bureau, 2008-2012 American Community Survey

Housing

	City of Mequon	Ozaukee County	Wisconsin
Total Housing Units	9,443	36,252	2,620,401
Owner-occupied Units	89.6%	78.6%	68.6%
Median Value	\$358,300	\$255,600	\$169,000
Renter-occupied Units	10.4%	21.4%	31.4%
Median Rent	\$1,292	\$819	\$749

Source: US Census Bureau, 2008-2012 American Community Survey

Income

	Per Capita Income	Median Household Income
City of Mequon	\$63,990	\$106,733
Ozaukee County	\$42,180	\$75,854
Wisconsin	\$27,426	\$52,627
United States	\$28,051	\$53,046

Source: US Census Bureau, 2008-2012 American Community Survey

Labor Force

	City of Mequon	Ozaukee County	Wisconsin
Population 16 and older	18,533	68,623	4,512,525
Population in labor force	63.2%	69.9%	68.5%
Population employed	59.6%	65.7%	63.3%
Population unemployed	3.6%	4.2%	5.1%

Source: US Census Bureau, 2008-2012 American Community Survey

Major Employers

Employer	Industry
Concordia University	Colleges, Universities, and Professional Schools (500+ employees)
Rockwell Automation Inc.	Relay and Industrial Control Manufacturing (500+ employees)
Columbia St. Mary's	General Medical and Surgical Hospitals (500+ employees)
Mequon-Thiensville Public Schools	Elementary and Secondary Public Schools (250-499 employees)
Dentaquest LLC	Direct Health and Medical Insurance Carriers (250-499 employees)
Telsmith Inc.	Construction Machinery Manufacturing (250-499 employees)
Pick 'n Save Mega Foods	Supermarkets and Other Grocery (100-249 employees)
HB Performance Systems Inc.	Motor Vehicle Brake System Manufacturing (100-249 employees)
Aurora Advanced Healthcare Inc.	Offices of Physicians (100-249 employees)
Newcastle Place	Continuing Care Retirement Communities (100-249 employees)

Source: Wisconsin Department of Workforce Development

Employment by Industry

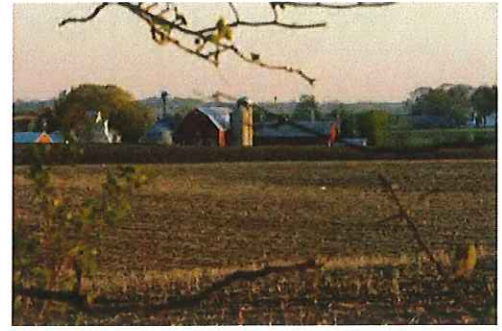
Total primary jobs in the City of Mequon	14,039
Total primary jobs in Ozaukee County	36,081

Primary Employment by industry category for workers employed in the City of Mequon:

Industry	Number Employed	Percent
Manufacturing	2,599	18.5%
Health Care and Social Assistance	2,472	17.6%
Educational Services	1,543	11.0%
Finance and Insurance	1,211	8.6%
Professional, Scientific, and Technical Services	1,126	8.0%
Retail Trade	1,077	7.7%
Accommodation and Food Services	948	6.8%
Wholesale Trade	866	6.2%
Administration & Support, Waste Management and Remediation	511	3.6%
Other Services (excluding Public Administration)	403	2.9%
Construction	307	2.2%
Arts, Entertainment, and Recreation	235	1.7%
Public Administration	196	1.4%
Information	143	1.0%
Real Estate and Rental and Leasing	131	0.9%
Transportation and Warehousing	112	0.8%
Management of Companies and Enterprises	98	0.7%
Agriculture, Forestry, Fishing and Hunting	61	0.4%

Source: U.S. Census Bureau, OnTheMap Application, 2011





Education

Educational Attainment:

	City of Mequon	Ozaukee County	Wisconsin
Bachelor's Degree or Higher	60.2%	44.0%	26.4%
High School Degree or Higher	98.3%	96.0%	90.2%

Source: US Census Bureau, 2008-2012 American Community Survey

School District Performance

The City of Mequon is served by the Mequon-Thiensville School District and the Cedarburg School District.

School District	Average ACT Score	Graduation Rate
Mequon-Thiensville	25.2	98.5%
Cedarburg	25.2	99.2%
Wisconsin	22.0	87.5%

Source: Wisconsin Department of Public Instruction, 2011-2012 School Year

Colleges, Universities, and Technical Schools

Postsecondary Educational Institutions within 25 miles (1,000 students or more):

University of Wisconsin-Milwaukee
Milwaukee Area Technical College
Marquette University
Concordia University
Cardinal Stritch University
Carroll University
Milwaukee School of Engineering
Alverno College
Mount Mary University
Medical College of Wisconsin
Wisconsin Lutheran College

Source: National Center for Education Statistics, College Navigator

Transportation

Highways

- Interstate Highway 43
- State Highways 57, 167, and 181
- County Highway W

Public Transit

- Ozaukee County Transit offers Ozaukee County Express bus service along I-43 and Shared-Ride taxi service throughout the county (www.ozaukeetransit.com).
- The Milwaukee County Transit System offers bus service to MATC and Concordia University (www.ridemcts.com).

Air

Commercial airline service is available at:

- Milwaukee's General Mitchell International Airport (27 miles south)
- Chicago O'Hare International Airport (95 miles south)

Rail

Area rail freight service is provided by Canadian National Railway and Union Pacific Railroad. Passenger rail service, provided by Amtrak, is available at the Milwaukee Intermodal Station, 18 miles south.

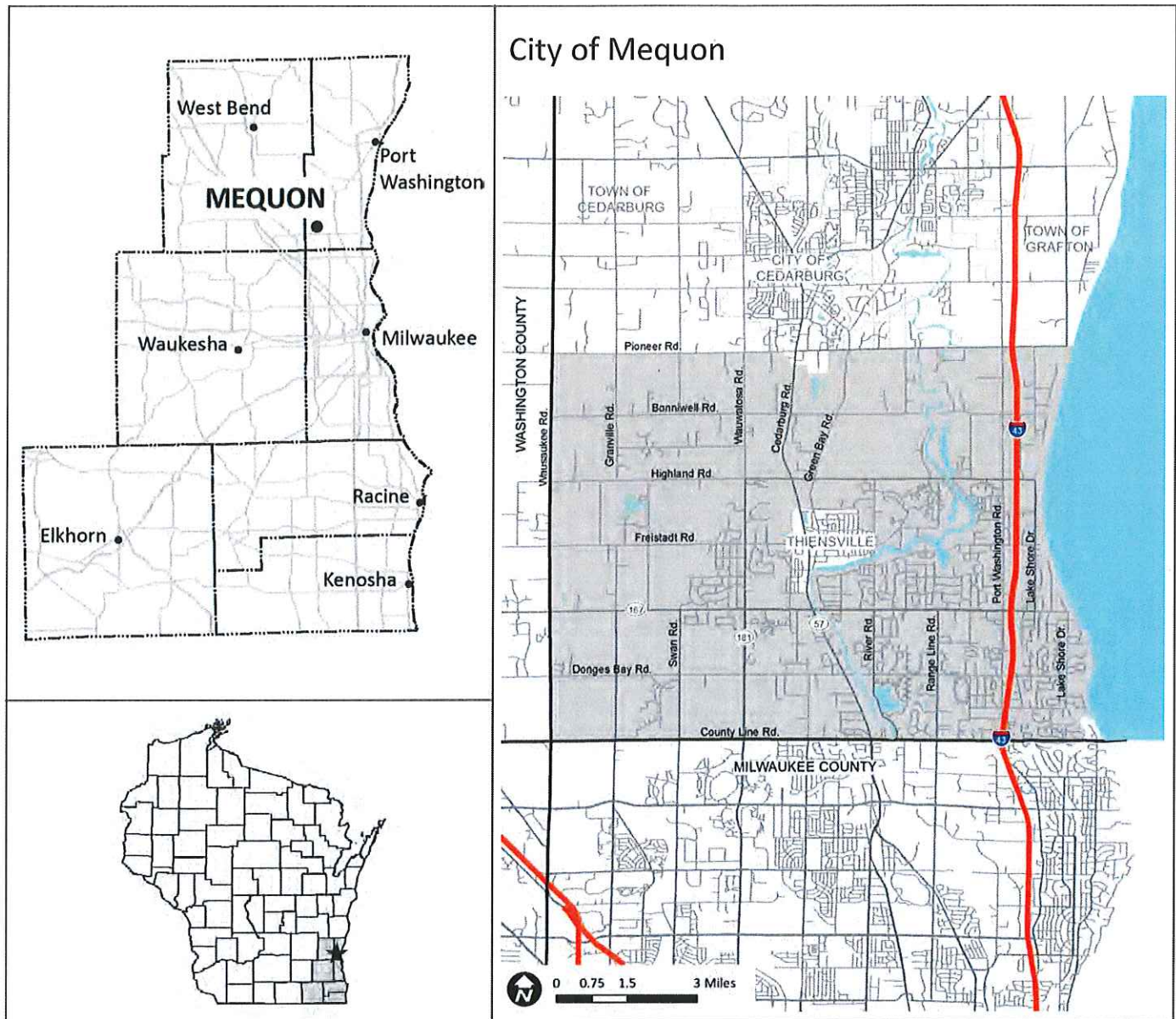
Water

- Port of Milwaukee (21 miles south)

Amenities

Located on the western shore of Lake Michigan just north of Milwaukee, the City of Mequon boasts majestic bluffs, stately homes, lush farmland and expansive open space. The community enjoys many parks, five golf courses, the winding Milwaukee River and easy access to the I-system for a convenient commute to Milwaukee. Mequon's rural heritage is preserved by high development standards and low-density zoning regulations. Fifty percent of the land within the City is undeveloped and still mostly farmed.

Mequon has one of the lowest crime rates and one of the lowest tax rates in the Metropolitan Milwaukee area. The award winning K-12 school system is ranked one of the best in Wisconsin. Prime healthcare facilities and services are readily available throughout the City and include Columbia St. Mary's Hospital. Mequon is also a business-friendly community with over 300 businesses and an industrial park with small and mid-sized firms as well as large firms like Rockwell Automation.



Local Contacts

City of Mequon

Community Development

Kimberly Tollefson, Director
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Mequon-Thiensville

Chamber of Commerce

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Ozaukee Economic Development

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Ozaukee County UW-Extension

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Note: Because of sampling variability, some estimates from the US Census Bureau 2008-2012 American Community Survey may not be statistically different from one another or from estimates for other geographic areas not listed in this profile.

Prepared by
Kate Pawasarat
Community Development Educator
Ozaukee County UW-Extension

UW
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Ozaukee County