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# ECONOMIC DEVELOPMENT STRATEGIC PLAN

ONEIDA NATION OF WISCONSIN



## ACKNOWLEDGMENTS

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# EXECUTIVE SUMMARY

## INTRODUCTION

The Oneida Nation's most recent economic development plan was completed in 1997. Much has changed in the past 20 years: the US and global economies endured the largest downturn in generations, and technological advances and other disruptive forces have transformed multiple industries. At the same time, entirely new business opportunities have emerged. These structural changes in the economy have buffeted Northeast Wisconsin. In the effort to keep pace, regional business and community leaders have launched new planning initiatives to strengthen the regional economy. These plans include the Greater Green Bay Chamber's economic development strategic plan launched in 2017 and *Driving the Future: A Strategy for Fostering Collaborative Economic Development along the Interstate-41 Corridor* completed in 2018 for the five-county area from Green Bay to Fond du Lac. In response to these challenges, the Oneida Nation engaged TIP Strategies, an Austin-based economic development consulting firm, to help prepare an economic development strategic plan. This plan is intended to guide the Nation's growth over the next 10 years.

## APPROACH

In December 2017, the project team held a kickoff meeting to launch the strategic planning process. Over 30 Oneida Nation stakeholders, including members of the Oneida Business Committee, department heads representing various tribal units, and other tribal leaders, attended the meeting. At the start, attendees were asked to use a single word to answer the question, "What is economic development?" Responses were collected using Mentimeter, an interactive polling tool. The results are illustrated in the word cloud in Figure 1 and provide a clear objective for this strategic plan.

**Economic development for the Oneida Nation will be focused on the growth of profitable businesses that provide revenue and opportunities for the Nation as a whole and, most important, for its people.**

These answers reflect the vision and mission of the Oneida Nation Community & Economic Development Division.

**Vision:** *To elevate the Oneida Nation by providing community & economic development practices that nurture and sustain Oneida families to prosperity.*

**Mission:** *To strategically implement systems that foster sustainable development and commerce growth that reflect Tsi' niyukwalihota (our ways) with innovative approaches that enrich the natural, built, and business environments.*

To provide a foundation for the planning process, the TIP consulting team conducted an assessment of demographics, commuting flows, and other qualitative and quantitative factors affecting the Oneida Nation's economic competitiveness. For comparative purposes, data are shown for the Oneida Nation's enrolled members, the Oneida Reservation (including all residents, tribal and nontribal, within the Reservation's geographic boundaries), the Green Bay metro area, the state of Wisconsin, and the US, where available. The TIP data analysis was supplemented by a stakeholder-input process that included meetings with the Oneida Business Committee, other tribal leaders, and key stakeholders in the Greater Green Bay area.

**FIGURE 1. WHAT IS ECONOMIC DEVELOPMENT (IN ONE WORD)?**



## ASSETS AND OPPORTUNITIES

The Oneida Nation benefits from several advantages that can be leveraged for economic development.

- **The Oneida Nation is intimately linked to the Greater Green Bay economy.** More than 2,600 workers commute from Green Bay to jobs located within the Oneida Reservation, while nearly 3,400 residents of the Oneida Reservation commute to jobs in Green Bay.
- **Large numbers of net outbound commuters in high-skill sectors represent a potentially untapped workforce.** The Oneida Reservation has a substantial net outflow of daily commuters—including both enrolled Oneida members and nonmembers—in the professional services, corporate headquarters (HQs), manufacturing, finance & insurance, and healthcare industries.
- **The Oneida Reservation hosts several major employers and industries.** Large employers on the Reservation include the Nation (the Tribe's gaming operations and programs), Schneider's corporate HQ, Northeast Wisconsin Technical College (NWTC), and several major retail establishments. Major industries located on the Reservation include entertainment, retail, manufacturing, healthcare, and corporate HQs.
- **The Oneida Nation benefits from strong demographics.** The Nation's population (enrolled Tribe members) has higher educational attainment levels and a larger share of young adults age 20–34 than the broader population living on the Reservation, the Green Bay metro area, Wisconsin, and the US.
- **Major commercial properties along I-41 and Highway 54 are regional destinations.** About 400,000 people currently live within a 30-minute drive of the I-41/Highway 54 intersection, and this population is projected to grow by more than 15,000 over the next 5 years.

## CHALLENGES AND RISKS

Despite the Nation's many strengths, there are significant challenges and risks that could affect the Tribe's potential for economic development, if left unaddressed.

- **Income levels for Oneida Nation residents are relatively low.** Median household income levels for the Oneida Nation are about 20 percent lower than the Green Bay metro area. The Nation also has a relatively high poverty rate (19 percent for the Tribe, compared to 11 percent for the metro area).
- **The Nation's most important source of revenue might be at risk.** The Tribe's gaming operations are no longer a growing business enterprise. Just as Amazon (and e-commerce, generally) have disrupted brick-and-mortar retail, the casino and gambling sector is struggling in response to newer forms of entertainment, including everything from Netflix to a growing interest in outdoor recreation.
- **Air passenger traffic at Green Bay Austin Straubel International Airport has declined precipitously in recent years.** The average number of monthly passengers at Green Bay's airport declined by nearly 37 percent from 2008 to 2018, while passenger traffic increased at Appleton International Airport.
- **The Nation faces the same structural challenges as Greater Green Bay and Wisconsin.** The surrounding region and state are dependent on traditional industries (especially manufacturing and agriculture). The region also struggles to attract and retain talent from outside the state and the Midwest.



## THE RESPONSE

This strategic plan is a response to the challenges and opportunities facing the Oneida Nation. While the plan builds on the Nation's past and present economic development efforts, it also expands the scope of the Nation's activities. The plan is structured around 12 initiatives, 6 target industries, and 3 performance measures. The initiatives are areas where the Nation should focus its programs and investments to encourage business development, job growth, and real estate development over the next 10 years and beyond. If tribal leadership and members embrace the strategies presented in this plan, there is every reason to believe the Nation can create lasting economic opportunities for Oneida members and businesses.

### TARGET INDUSTRIES

- Agriculture and Food Processing
- Software and Data Analytics
- Manufacturing
- Tourism and Entertainment
- Professional Services
- Health Care Services and Products

### PERFORMANCE MEASURES

- Growth of tribal revenue and profits
- Job growth, especially middle- to high-wage jobs
- Real estate development

## THE 12 INITIATIVES

- 1. ENTREPRENEURSHIP AND INNOVATION.** Support the growth and profitability of Oneida businesses.
- 2. ONEIDA BUSINESS PARK.** Reinvent the Oneida Business Park as an anchor for tribal economic activity.
- 3. AGRICULTURAL BUSINESS DEVELOPMENT.** Leverage the Nation's agricultural lands for sustainable business growth.
- 4. ALIGNMENT WITH THE PACKERS.** Launch new partnerships with the Green Bay Packers on multiple fronts.
- 5. RESIDENTIAL AND MIXED-USE DEVELOPMENT.** Encourage new residential and mixed-use development to generate a larger, more diverse customer base in support of Oneida businesses.
- 6. MARKETING AND IMAGE.** Raise the Oneida Nation's profile through marketing efforts aimed at internal and external audiences.
- 7. AIRPORT DEVELOPMENT.** Capitalize on the Green Bay Austin Straubel International Airport's economic potential.
- 8. VISITOR ATTRACTION.** Elevate the role of the Oneida Reservation as a visitor destination with events, conferences, and new tourist attractions.
- 9. REGIONAL EDUCATION AND TRAINING PARTNERSHIPS.** Partner with area higher education institutions to create new training and education opportunities for Oneida members.
- 10. GLOBAL TALENT RECRUITMENT.** Launch a global talent recruitment strategy for Oneida members.
- 11. ONEIDA DEVELOPMENT HOLDINGS.** Establish Oneida Development Holdings, LLC, as the primary organizational structure for tribal business acquisition and new enterprise development efforts.
- 12. FUTURES COMMITTEE.** Create a task force to explore the future of gaming and other sectors.

# STRATEGIC PLAN

## INITIATIVE 1. ENTREPRENEURSHIP AND INNOVATION

*Support the growth and profitability of Oneida businesses.*

Strategies for diversifying the Oneida Nation's economy cannot rely solely on business recruitment and business acquisition. Entrepreneurs, innovative companies, creative workers, and technology are critical elements of a dynamic local economy. Tying start-up businesses to actual business product and service demands—the reverse pitch approach (see description to the right)—goes a long way to getting a successful entrepreneurship program started. The Nation could benefit from regional entrepreneurship initiatives led by Microsoft and the Green Bay Packers, especially the Microsoft TechSpark and TitledownTech programs. The Tribe can also become more closely involved in grassroots entrepreneurial efforts, such as the new 1 Million Cups Green Bay chapter (launched in April 2018), to enhance networking for area startups and entrepreneurs.

### THE REVERSE PITCH APPROACH

Investors are used to having entrepreneurs pitch them ideas for new products and services. The “reverse pitch” approach takes the opposite stance, by having organizations “pitch” a specific problem/need to a group of entrepreneurs who can, in turn, offer solutions that are funded by the organization.

The Nation should also establish a small business and entrepreneurship center on the Reservation, with a mission to advance the growth and creation of Oneida small businesses. This facility will provide a range of support services to stimulate growth of existing businesses and the creation of new ventures. The new center should also play a role in the growth of business activity tied to contracting opportunities with large employers throughout Greater Green Bay.

## STRATEGIES AND ACTIONS

### 1.1. Establish a small business and entrepreneurship center for the Oneida Nation.

- 1.1.1. Locate the center in Central Oneida (in “downtown Oneida” or near the central part of the Reservation).
- 1.1.2. Ensure the new facility is adequately supported, promoted, and leveraged by the Nation.
- 1.1.3. Use the facility to connect Oneida entrepreneurs to Greater Green Bay's entrepreneurial community and corporations.
- 1.1.4. Work with Bay Bank, other area banks, financial services firms, and other professional services firms to pursue initiatives aimed at increasing the availability of capital for new and growing Oneida small businesses.

### CHOCTAW SMALL BUSINESS DEVELOPMENT SERVICES (CSBDS)

The Choctaw Nation's CSBDS supports tribal members in starting and growing businesses across the Nation's 10.5-county tribal region in Oklahoma. CSBDS provides a full range of technical assistance, including business planning, financing, forgivable loans, physical space (an incubator in Durant and a coworking space in Idabel), and access to the Nation's purchasing for qualified business owners. Outside the region, CSBDS supports the ChahtaPreneurs network of Choctaw business owners and entrepreneurs, designed to help tribal members access business opportunities and partnerships across the US.

### 1.2. Launch a business visitation program to better understand and address the needs of Oneida businesses.

**1.2.1.** Model the program on the Greater Green Bay Chamber’s Business Expansion and Retention (BEAR) program.

**1.2.2.** Structure visits to achieve several outcomes.

- Educate the business about the Nation’s economic development services.
- Collect answers to a standard set of questions about the company’s challenges and identify ways the Nation can help address those challenges.
- Identify businesses that are expanding their operations in Greater Green Bay or are considering a relocation outside the area.
- Uncover supplier recruitment opportunities that would benefit existing businesses.

**1.2.3.** Develop relationships with relevant professional service providers (such as accounting firms, marketing/public relations firms, and commercial real estate brokers) to provide a more detailed understanding of the company’s needs and challenges.

**1.3.** Invest in an Oneida Nation presence in the new Cannery coworking space and T2 Accelerator building in downtown Green Bay.

**1.3.1.** Offer a one-week rotating workspace for Oneida entrepreneurs.

**1.3.2.** Use the presence to expose Green Bay area entrepreneurs and tech workers to business partnerships and mutually beneficial relationships between tribal and nontribal entrepreneurs.

## **INITIATIVE 2. ONEIDA BUSINESS PARK**

*Reinvent the Oneida Business Park as an anchor for tribal economic activity.*

Traditional industrial park development is no longer a reliable economic development strategy. First, the amount of available industrially zoned land in eastern Wisconsin far exceeds the demand. Second, manufacturers are increasingly sensitive to the needs of their workforce and require more than serviced sites for many industrial uses. As a result, strategies that build on existing activity, both for the Tribe and for the region, will be more successful. An approach that considers the expansion needs of Greater Green Bay and I-41 businesses is more likely to reap benefits than entering into a region-wide competition for the cheapest industrial land in the upper Midwest. Initiative 5 addresses creative land development, with the goal of incorporating low-impact, advanced manufacturing with housing and amenities. This “mixed use” approach is more feasible on the Reservation than in Green Bay (due to restrictive zoning).

### **STRATEGIES AND ACTIONS**

**2.1.** Work with existing Oneida businesses to explore the potential to expand or relocate to the Oneida Business Park. Offer incentives (such as land, infrastructure, utilities) to assist Oneida businesses willing to move their operations to the business park.

**2.2.** Market and promote the Oneida Business Park as a location for new and expanding companies in manufacturing, food processing, and related sectors.

**2.2.1.** As part of this effort, encourage existing Greater Green Bay businesses to expand or relocate to the Oneida Business Park.



- 2.2.2.** Identify and recruit food processing and agriculture-related companies in surrounding rural areas that would benefit from a location closer to the Greater Green Bay and Appleton urban areas.
- 2.3.** Incorporate new housing development and other “mixed use” projects in and adjacent to the Oneida Business Park.

### INITIATIVE 3. AGRICULTURAL BUSINESS DEVELOPMENT

*Leverage the Nation’s agricultural lands for sustainable business growth.*

Agriculture is a central part of Wisconsin’s identity and its economy. Known as the nation’s dairy land, the state is also a leading producer of cranberries, corn, soybeans, and a variety of other crops and animal products. Wisconsin is also the second-ranked state in the US by number of organic farms, after California. Wisconsin’s organic farms and organic acreage are growing at a rapid pace. The Greater Green Bay area and the Oneida Nation are well-positioned to capitalize on the state’s agricultural strengths. The Oneida Nation sits on a Reservation of 65,000 acres, including 12,000 tillable acres. The development of agricultural business, especially organic food products, represents a significant opportunity to move toward the Nation’s goal of a “triple bottom line” (people, planet, profit) approach to sustainable economic development. A logical starting point for this goal is a feasibility analysis of demand for organics in particular (strategy 3.1).

#### STRATEGIES AND ACTIONS

- 3.1.** Partner with the University of Wisconsin–Extension to conduct a detailed study of the market potential for organically grown food products on Oneida agricultural lands.
- 3.2.** Expand the partnership between the Outagamie County 4H and Microsoft with the “Tech Changemakers” program. This program uses the popular video game Minecraft to spark the interest of Oneida Nation youth in their traditional agriculture and history.
- 3.3.** Build brand awareness for an “Oneida Natural” product line of organic and natural food products. Market the brand in natural and organic grocery stores in the Greater Green Bay, Appleton, Madison, and Milwaukee markets.
- 3.4.** Develop a food hub to support the growth of Oneida agriculture by providing a combination of production, distribution, and marketing services to connect Oneida farmers with local and regional buyers. Use the food hub center to support small-scale and organic food product development in the surrounding region.

### INITIATIVE 4. ALIGNMENT WITH THE PACKERS

*Launch new partnerships with the Green Bay Packers on multiple fronts.*

The Green Bay Packers are the most unique asset for economic development in Greater Green Bay. Their global brand helps Green Bay stand out from the crowd of small- and mid-sized cities across the Midwest. In addition to the team’s unparalleled history, unique community ownership status, and widespread appeal as the third most televised National Football League (NFL) team, the Packers are making substantial investments in the region’s future. The Titletown District has already emerged as a vibrant node of activity, with much more development in store. The Packers’ new venture capital (VC) fund, a partnership with Microsoft, holds the potential to generate a wave of entrepreneurial business growth in Northeast Wisconsin. While the Oneida Nation has had a close relationship with the Green Bay Packers, that relationship has the potential to expand far beyond the Oneida Radisson Hotel & Conference Center (the official hotel of the Packers). In response to the Packers’ multifaceted commitments to

regional economic development, this plan emphasizes a more proactive stance from the Nation toward partnering with the Packers.

## STRATEGIES AND ACTIONS

### 4.1. Explore location options for Oneida businesses in the Titledown District and in Lambeau Field.

*Small business growth that is not outward looking (businesses that do not seek to serve a market beyond tribal members) is less likely to succeed in the marketplace. This plan recommends that the Nation capitalize on the Packers' access to outside markets with strategic expansion locations for Oneida businesses.*

#### 4.1.1. Negotiate with the Packers for retail space in new developments around Lambeau Field.

#### 4.1.2. Open an Oneida One-Stop convenience store or other Oneida retail establishment (potentially associated with existing/new agriculture products) in partnership with the Packers.

### 4.2. Engage in conversations with the Packers and Microsoft about ways in which the Nation can collaborate with the two organizations in their joint TitledownTech initiative. This initiative includes a \$10 million VC fund and other programs aimed at strengthening the entrepreneurial ecosystem in Northeast Wisconsin.

*The Packers fund, now matched by Microsoft, is significant for a number of reasons. First, it supports the growth of the entrepreneurial ecosystem, and second, it presents specific opportunities for co-venturing around socially responsible investment.*

### 4.3. Conduct competition-based entrepreneurial activities to address social entrepreneurship solutions for tribal challenges.

#### 4.3.1. Encourage the Packers and Microsoft to evaluate social entrepreneurship proposals for the Nation, as part of the TechSpark initiative.

#### 4.3.2. Submit the most highly rated projects for funding review by the Packers/Microsoft VC corporation.

#### 4.3.3. Involve other businesses, organizations, and foundations (not limited to the Green Bay Area) to serve as partners with the Nation in addressing social entrepreneurship challenges.

#### 4.3.4. Actively solicit additional funds from investors in the Greater Green Bay region, to further leverage tribal resources.

### GREEN BAY PACKERS + MICROSOFT

In October 2017, the Green Bay Packers and Microsoft launched TitledownTech, a one-of-a-kind partnership between the two organizations aimed at boosting economic expansion in Northeast Wisconsin and bringing world-class digital innovations to Greater Green Bay. The partnership is part of the Microsoft TechSpark program, a national civic program designed to foster greater economic opportunity and job creation in six locations across the US.

TitledownTech focuses on three areas.

1. TitledownTech Accelerator: a program that provides resources, advisors, and mentors for young companies to develop and market new digital technology.
2. TitledownTech VC Fund: an investment fund jointly financed by the Packers and Microsoft.
3. TitledownTech Labs: an 18-week lab that connects established firms with Microsoft's global resources for the purposes of technology development.

## INITIATIVE 5. RESIDENTIAL AND MIXED-USE DEVELOPMENT

*Encourage new residential and mixed-use development to generate a larger, more diverse customer base in support of Oneida businesses.*

Growth in Greater Green Bay is accelerating. The ability to offer new retail and residential options—in addition to commercial office space that does not duplicate existing options—can be a huge boon for the Nation. Underlying this goal is the idea that *revenue* is a major driver of the Tribe’s economic development initiatives. In a practical sense, this means that the development focus should extend beyond the Tribe itself. Opportunities for higher-value development along specific corridors and within focused districts are important for the Nation’s future growth. Development options could include traditional business/industrial parks, retail complexes, or mixed-use projects with a combination of residential and commercial (retail and office) space.

## STRATEGIES AND ACTIONS

- 5.1.** Explore options for residential development (including mixed-use) throughout the Reservation to provide a larger customer base in support of Oneida small businesses.
- 5.2.** Identify one or more large, vacant, and/or underutilized properties on the Reservation to be packaged and promoted through a Nation-led “development offering” or design competition. Potential development sites include the land just south of NWTC, underutilized sites near the I-41/Highway 54 intersection, a portion of the Oneida Business Park, or areas near the Oneida Radisson Hotel & Conference Center.
  - 5.2.1.** This strategy should include the promotion of a specific site through a request for expression of interest (RFEI), marketed to the real estate development community.
  - 5.2.2.** Create a task force to evaluate development options based on responses to the RFEI.
  - 5.2.3.** Once a shortlist (two or three highly qualified developers) is identified, move to a request for proposal (RFP) that requires a more detailed development scenario, including conceptual site plans and pro formas for capital costs and operating costs.
  - 5.2.4.** From the RFP, select a developer to partner with on a public-private partnership to jointly develop the site, retaining tribal ownership of the land, for an agreed upon mix of uses.

## INITIATIVE 6. MARKETING AND IMAGE

*Raise the Oneida Nation’s profile through marketing efforts aimed at internal and external audiences.*

The Oneida Nation is well known in Greater Green Bay for its casino and hotel operations. But how many area residents know that the Oneida Nation employs more than 2,700 workers directly, making it the third largest employer in Brown County, after Humana and Bellin Health? How many area residents realize the Nation is a major agricultural producer, with 12,000 tillable acres as part of the larger Oneida Reservation that occupies more than 65,000 acres in Brown and Outagamie counties? And how many people are aware that the Nation controls some of the most important real estate along the I-41 corridor, including major commercial properties at the I-41/Highway 54 intersection? There might not be precise answers to these questions, but there is no doubt that the Oneida Nation is an integral part of the Greater Green Bay economy, and far too few people appreciate this fact.

A successful marketing program requires highly targeted messaging aimed at specific audiences, both internal and external. Generic marketing and promotional efforts aimed at convincing a broad audience that the Oneida Reservation is a “great place to live, work, and play” will not be sufficient to tell the Nation’s unique story internally, throughout the Greater Green Bay region, across Wisconsin, and beyond. The internal component of the Nation’s marketing will rely on a greater level of engagement with young professionals and emerging tribal leaders and a

greater focus on telling the Oneida story within the Greater Green Bay and I-41 region. The external component of the Nation's marketing will be focused on target industry attraction aimed at specific industries.

## STRATEGIES AND ACTIONS

- 6.1.** Work with the Greater Green Bay Chamber to host a group of regional economic development partners on the Oneida Reservation for regular meetings (at least quarterly) to share knowledge and coordinate activities aimed at growing the regional economy.
- 6.2.** Host an annual Oneida Nation economic forecast event and summit that would bring together all of the area's business and community leaders to discuss the Nation's economic trends and opportunities. Use the event as an opportunity to educate regional leaders about the important role the Oneida Nation plays in the Greater Green Bay economy and to highlight ongoing/planned partnerships between the Tribe and other organizations involved in regional economic development.
- 6.3.** Maintain and enhance the visual appeal of major gateways into the Oneida Reservation through landscaping, streetscape and trail investments, and attractive signage.
- 6.4.** Engage young professionals and emerging tribal leaders as an internal target audience for the Nation's marketing efforts. Conduct a regular survey/questionnaire to evaluate how the Nation's young adults make decisions about where to live, work, and spend leisure time.
- 6.5.** Strengthen the Nation's target industry attraction program through external marketing and by cultivating relationships with key business decision-makers.
  - 6.5.1.** Focus marketing efforts on six target industries. *(For a detailed explanation of these industries, see the Oneida Nation Target Industry Analysis, published as a separate report.)*
    - Agriculture and food processing.
    - Software and data analytics.
    - Manufacturing.
    - Tourism and entertainment.
    - Professional services.
    - Health care services and products.
  - 6.5.2.** Identify specific companies within these target industries that could be acquired by the Nation under the external organizational structure of Oneida Development Holdings (See *Initiative 11*).

## INITIATIVE 7. AIRPORT DEVELOPMENT

*Capitalize on the Green Bay Austin Straubel International Airport's economic potential.*

One of the most important assets for economic development in the Oneida Nation is the Green Bay Austin Straubel International Airport. Located on the Reservation, directly across from the Nation's largest casino and the Radisson Hotel & Conference Center, the airport is the primary gateway connecting Greater Green Bay to the rest of the country and the world. The lack of nonstop air travel connections between Green Bay and other airports is a limiting factor for economic development. It is a significant barrier to the attraction of new businesses, especially for divisional/regional HQs, technology companies, and professional services firms. Similar challenges plague nearby small commercial airports in Wisconsin, such as Appleton, Wausau, and Madison. The importance of airport

access to the business world cannot be overstated. Separate from the need to improve flight connections, the Nation can work closely with the airport to pursue real estate development and business expansion opportunities.

## STRATEGIES AND ACTIONS

- 7.1.** Continue working with Brown County and area business leaders to expand air travel options that provide new nonstop flights between Green Bay and major business hubs around the country (such as Dallas-Fort Worth, New York City, and DC).
- 7.2.** Partner with Brown County to conduct a long-term “aerotropolis” visioning plan for the Green Bay Austin Straubel International Airport as a hub for airport-related commerce and real estate development.
- 7.3.** Evaluate the potential for the Nation to acquire airport-related businesses.
- 7.4.** Acquire and develop properties adjacent to and near the airport to provide space for businesses seeking a location in proximity to the airport.
- 7.5.** Aggressively pursue the creation and attraction of businesses in Foreign Trade Zone #167.

## INITIATIVE 8. VISITOR ATTRACTION

*Elevate the role of the Oneida Reservation as a visitor destination with events, conferences, and new tourist attractions.*

Tourism is not considered economic development by everyone in the economic development profession. Fortunately, in recent years, this narrow mode of thinking has given way to a more expansive view of what drives local and regional economies. The benefits that tourism provides to a local economy can be measured through increased visitor spending, positive impacts on local businesses, and the development of new businesses and destinations. Tourism also provides the less tangible, but still important, benefits of enhancing the image and external visibility of a community, which can support broader talent attraction and business recruitment initiatives.

The role of events, festivals, and conferences should be explored as a key component of a local tourism strategy. Major events can have a profound influence on how the outside world views the Oneida Nation. A prime example of an event translating into significant economic development outcomes (beyond just tourism spending) is the South by Southwest (SXSW) music and interactive festival, which has accelerated Austin’s position as a national technology and innovation hub. Similar linkages between tourism and economic development should be encouraged in the Nation to leverage the Tribe’s tourism assets and expose the area to other business development opportunities.

### DIVERSIFICATION OF THE LAS VEGAS ECONOMY

Las Vegas offers an instructive example for tribal economies, many of which are highly dependent on casinos and gaming revenue. The Vegas economy was founded on casinos and gaming. The gaming sector is still concentrated in Vegas—it is the largest cluster of casinos in North America—and tourism is still the bedrock of the region’s economy. But visitor attraction is no longer limited to gaming. Vegas has leveraged its tourism assets to become a leading center for conventions, trade shows, and a more diverse menu of entertainment, including world-class shows and performances. The region still has plenty of room for further economic diversification, but it has come a long way from its origins as a hub for games of chance.

## STRATEGIES AND ACTIONS

- 8.1.** Continue and expand event/festival promotion efforts to fuel economic activity and to attract visitors to the Reservation.

- 8.1.1.** Support the growth and success of existing events hosted by the Nation (such as the Thornberry Creek LPGA Classic).
- 8.1.2.** Create new events hosted by the Nation.
- 8.1.3.** Partner with the Greater Green Bay Convention & Visitors Bureau to host more events at the Oneida Radisson Hotel & Conference Center.
- 8.2.** Explore opportunities to market and promote the Creator's Game (lacrosse) as a visitor attraction strategy.
- 8.3.** Develop new entertainment destinations on the Reservation, focusing on the area adjacent to the Radisson Hotel & Conference Center, retail ground zero, and Central Oneida.
  - 8.3.1.** Follow the Las Vegas diversification strategy, which began with casinos and gambling, then moved toward broader entertainment and business conventions/trade shows.
  - 8.3.2.** Recruit or develop major entertainment businesses (such as upscale theaters, bouldering gyms) that would draw visitors from the Green Bay/Appleton markets and throughout Wisconsin.
  - 8.3.3.** Leverage the new location of the Oneida Nation Museum for visitor attraction.

## INITIATIVE 9. REGIONAL EDUCATION AND TRAINING PARTNERSHIPS

*Partner with area higher education institutions to create new training and education opportunities for Oneida members.*

Access to skilled workers is the top factor affecting the success of most businesses in today's economy. The large number of projected job openings in Greater Green Bay (as a result of new jobs and replacement of retiring workers), coupled with the tight labor market, has created an economic opportunity for the local workforce, including Oneida members. To the degree possible, efforts should be made to align the region's talent base with the needs of its employers. This will require increasing the pipeline of graduates from area educational institutions and creating more opportunities for connections between employers and employment-ready residents.

Workforce development specifically for Oneida Tribe members, internally and in collaboration with NWTC and the University of Wisconsin–Green Bay (UW–Green Bay), is a priority for the Tribe's long-term prosperity. Both NWTC and UW–Green Bay have expressed interest in developing stronger partnerships for education and training with the Oneida Nation. The Nation benefits from a long-standing partnership with NWTC, which should be continued and expanded. NWTC's location on the Reservation makes it a natural partner for the Nation's workforce development and training needs. And the new engineering school at UW–Green Bay represents an opportunity for tribal members to cultivate skills in demand from regional employers.

### STRATEGIES AND ACTIONS

- 9.1.** Continue the long-standing partnerships between the Nation and NWTC.
  - 9.1.1.** Continue partnering with NWTC to provide opportunities for Oneida members to gain higher education credentials and to improve career readiness for young adults.
  - 9.1.2.** Engage in discussions with NWTC about opportunities for joint real estate development (including mixed use) in and around the flagship NWTC campus on the Reservation.
- 9.2.** Launch new partnerships for education and training with UW–Green Bay.



- 9.2.1.** Work with UW–Green Bay to expand educational programs to document, study, and celebrate the unique cultural heritage of the Oneida people.
- 9.2.2.** Work closely with UW–Green Bay and NWTC to build a pipeline of K–12 students from the Oneida Nation to pursue higher education opportunities at the university’s new Richard J. Resch School of Engineering.
- 9.3.** Engage in regional employer/training partnerships aimed at addressing key workforce issues facing the region’s industries.
  - 9.3.1.** Participate in regional workforce development programs led by the Bay Area Workforce Development Board, the Northeast Wisconsin Manufacturing Alliance, and other workforce development and industry associations. Encourage Oneida members to continually invest time and effort in education, technical training, and other skill enhancement activities.
  - 9.3.2.** Work with major employers in Brown County and higher education institutions to create skills-matching initiatives that connect Oneida members seeking employment or a better job with employers who are ready and willing to provide training for the development of specific skills required for in-demand jobs.

## INITIATIVE 10. GLOBAL TALENT RECRUITMENT

*Launch a global talent recruitment strategy for enrolled Oneida members.*

The economic development profession is increasingly coming to the realization that workforce development and talent retention are not enough to fuel the engine of a growing economy. Increasing the labor pool, through the attraction of new workers, is essential for meeting the staffing needs of regional employers. The challenge for Greater Green Bay is that attracting talent from outside the region is difficult. The same is true for Wisconsin and most of the Midwest and Northeast. From 2010 to 2017, Midwestern states lost about 1.3 million net residents due to domestic migration, and nearly 2 million left the Northeast. The South (including Texas) gained 2.6 million net new residents from domestic migration since 2010, and Western states gained about 600,000.

Fortunately, the Oneida Nation benefits from a distinct advantage. The Nation has many enrolled members living outside the region, including thousands in the Milwaukee area and thousands residing outside Wisconsin. These members already have a strong connection to Greater Green Bay, eliminating what is typically the biggest hurdle in talent attraction. Recruiting people with connections to the region is considerably easier than trying to convince someone to move to a new area without established ties (friends, family, work/business). The Nation should launch a global talent recruitment campaign to encourage Oneida members to move to the Tribe’s cultural and economic HQ, focusing most on members currently living outside Wisconsin. The potential creation of an incentive to entice Oneida members to relocate to the Reservation could further sweeten the deal.

### TALENT ATTRACTION: STATE OF VERMONT

The state of Vermont signed a new bill into law in May 2018 that will pay remote workers \$5,000 a year for 2 years to move to Vermont, as long as their employer is based in another state. This creative and aggressive approach to talent attraction is a response to the growing share of workers who no longer commute to a physical work location on a regular basis. The percentage of the US labor force working remotely has grown from 3.3 percent in 2000 to 5 percent in 2016. Vermont’s new program is also designed to address the state’s challenge of having a small, aging population. According to 2017 US Census Bureau estimates, the state’s population is less than 625,000 and has remained essentially flat since 2010.

## STRATEGIES AND ACTIONS

**10.1.** Launch a campaign to encourage enrolled Oneida members to move to the Reservation.

**10.2.** Provide incentives for tribal members relocating from outside of the Reservation.

**10.2.1.** Provide two tiers of incentives: one for tribal members moving to the Reservation from other parts of Greater Green Bay; and a higher level of incentives for those relocating from outside Wisconsin.

**10.2.2.** Provide specific incentives for tribal members who work remotely for an employer who is based outside the region. (See the state of Vermont's talent attraction incentive of \$10,000 for remote workers as an example.)

## INITIATIVE 11. ONEIDA DEVELOPMENT HOLDINGS

*Establish Oneida Development Holdings, LLC, as the primary organizational structure for tribal business acquisition and new enterprise development efforts.*

The Tribe owns a multitude of successful businesses, ranging from those serving local markets (Oneida One-Stop convenience stores) to businesses with statewide customers (Oneida Casino) and even global reach (Oneida Total Integrated Enterprises). Supporting the continued growth of revenue and profits for these existing businesses will remain a priority for the Nation. New business acquisition efforts are another great opportunity for the Nation, especially in collaboration with the Greater Green Bay Chamber's business recruitment program. Additionally, partnerships with other tribes and businesses for creating and/or acquiring businesses could provide new revenue sources for the Nation.

## STRATEGIES AND ACTIONS

**11.1.** Engage in conversations with existing nontribal companies about potential acquisition by the Nation.

**11.1.1.** Start acquisition conversations with successful companies located on the Reservation, then extend to companies located in Greater Green Bay and the I-41 corridor, and then outside the region.

**11.1.2.** Focus business acquisition efforts on established companies operating in sectors where the Nation has existing expertise (such as hotels, restaurants, or convenience stores) or where the Nation is seeking to develop a stronger portfolio (the six target industries).

**11.2.** Structure business development and acquisition deals to ensure a healthy balance of corporate sustainability and financial benefits to the Tribe.

**11.3.** Use the due diligence checklist (delivered to the Nation as part of this planning process) to evaluate all investment opportunities.

### WINNEBAGO TRIBE: HO-CHUNK, INC.

Using revenues from gaming, the Winnebago Tribe of Nebraska created Ho-Chunk, Inc., (HCI) in 1994 as the externally focused investment and economic development arm of the Tribe. Initially created to solve a lack of housing on-reservation, HCI's portfolio grew from one construction company to a variety of on-reservation and off-reservation investments. These investments were often vertically integrated with other Winnebago businesses, ensuring that the benefits of business expansion were captured by the Tribe each time a division, such as convenience stores or cigarette outlets, expanded. Off-reservation investments diversified HCI's portfolio and allowed the Tribe to gain external business expertise and apply it to on-reservation ventures. HCI has grown to 1,000 employees with operations in 26 states and annual revenue of about \$230 million.

## INITIATIVE 12. FUTURES COMMITTEE

*Create a task force to explore the future of gaming and other sectors.*

It is easy for community leaders to feel threatened by a “sky is falling” mindset when traditional industries are disrupted by new technologies and business models. This is especially relevant for communities that are home to traditional industries that lose jobs due to technological innovation. Amazon’s disruption of brick-and-mortar retail, Uber’s disruption of the taxi industry, and Netflix’s disruption of cable television are some of the most prevalent examples. However, it is important for economic development leaders to appreciate that disruption creates just as many opportunities as challenges. The Oneida Nation will have to position itself to stay ahead of the curve and align its assets to pursue business growth across several different industries. The Tribe’s casino operations stand out as the most vulnerable to disruption, in light of trends in the gaming industry. To help the Nation respond to industry disruption in a proactive way, this plan calls for the creation of a Futures Committee to establish a task force to explore the future of gaming and other sectors.

Other communities have created similar internal leadership groups. The city of Fort Collins, Colorado, created its Futures Committee to assist city councilmembers in their decision-making process. They meet monthly with a goal “to position the City in the distant future (30 plus years) for achievable successes, integrating community desires with known fiscal, social and environmental data.”

This recommendation has three purposes. The first is to ensure tribal leadership recognizes that disruption, as a force in business, extends to the public sector. This understanding is important, given the Nation’s unique status as an organization with both business and government functions. The second purpose is to address specific purchasing opportunities that will advance technology solutions for the Oneida Nation. The third purpose is to remind tribal leadership that the Nation’s major investments (from transportation to water to energy) can also be stimuli for economic development.

- 12.1.** Launch a Futures Committee task force, modeled after the city of Fort Collins, with a small group (10–15 individuals) of tribal leaders and industry experts.
- 12.2.** Explore threats and opportunities associated with the future of gaming, including upstream gaming opportunities, such as data analytics and augmented reality/virtual reality.
  - 12.2.1.** Beyond gaming, consider expanding the task force to address future-oriented insights into other target industries for the Nation (such as agriculture or healthcare).
- 12.3.** Use the Futures Committee to address purchasing options. Identify major capital expenditures anticipated by the Nation and invite tech companies to offer nontraditional solutions.

## APPENDIX 1. DEVELOPMENT DISTRICTS

The Oneida Reservation occupies more than 65,000 acres in Brown and Outagamie counties. The Nation controls important real estate along the I-41 corridor, including major commercial properties at the I-41/Highway 54 intersection. As Greater Green Bay continues its outward growth and development in the direction of the Oneida Reservation, it will become increasingly important for the Nation to engage in strategic real estate development projects. The Oneida Nation Division of Land Management and the Oneida Nation Land Policy Framework Map (published as part of the *Oneida Reservation Comprehensive Plan*, adopted in 2008) address land use issues in much greater detail. The purpose here is to focus on key districts for economic development. With that goal in mind, TIP limited the analysis to a group of five development districts that have the greatest potential to expand the employment base and generate new revenue for the Tribe, both through development and redevelopment. TIP's evaluation included the following five districts.

1. Oneida Business Park (Central Oneida)
2. Retail "Ground Zero" (I-41 and Highway 54/Mason Street)
3. Oneida "Entertainment District" (Radisson Hotel & Conference Center, Oneida Casino, Airport)
4. Highway 29 and Hillcrest Road
5. Packerland Drive and Grant Street

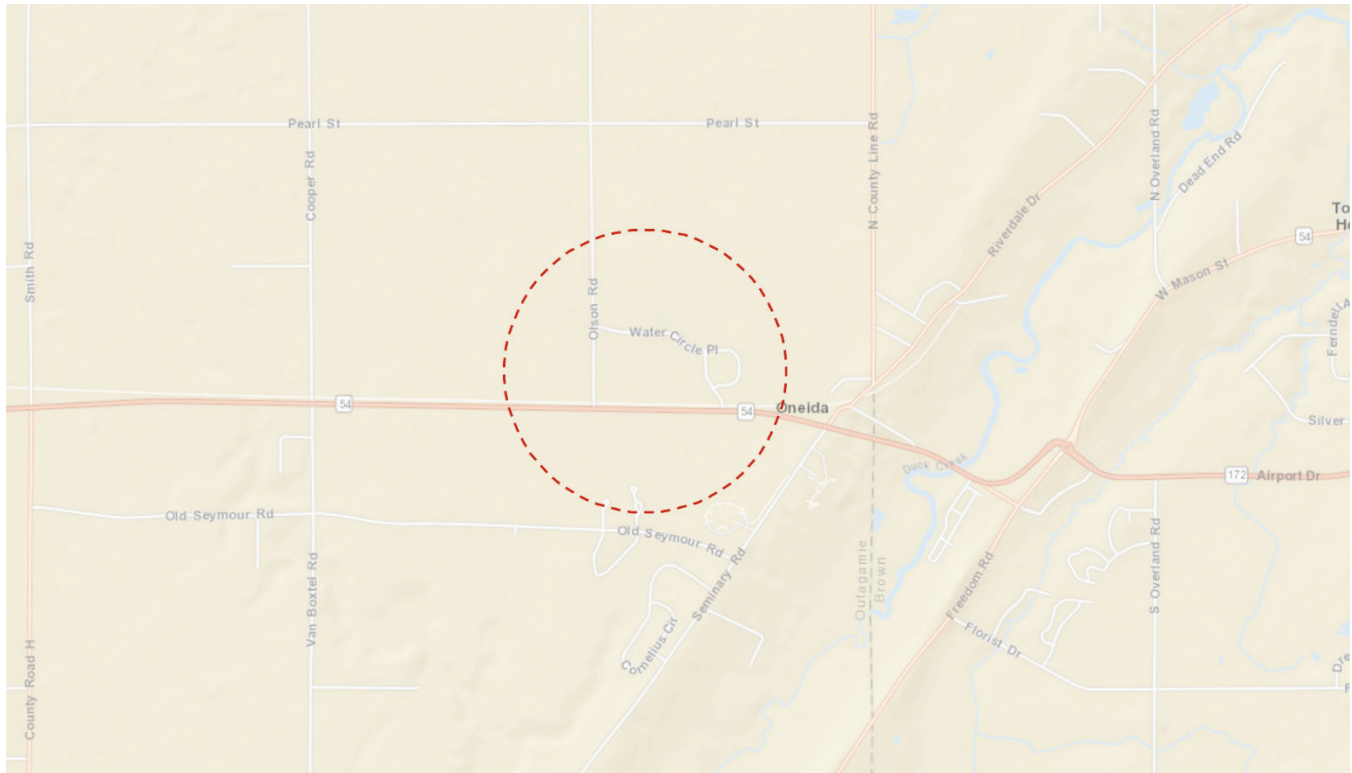
Each district was assessed according to the following factors to provide a better understanding of constraints and opportunities for real estate development.

### DISTRICT EVALUATION FACTORS

- **Size:** Is the district large enough to accommodate significant development?
- **Infrastructure:** Does the district have water, wastewater, electricity, gas, broadband, and any other needed infrastructure?
- **Tribal Ownership:** How much of the district's land is currently owned by the Nation or could be acquired?
- **Land Uses:** Does the current land use (including the Nation's plans) support new development or redevelopment? Are surrounding properties compatible with potential development options for the district?
- **Highway Access:** Is the site adjacent to a major highway?
- **Arterial Road Access:** Is the site easily accessible to arterial roads and streets?
- **Visibility:** Does the site have high visibility?
- **Employment Potential:** Can the site accommodate a large number of new jobs?
- **Revenue Potential:** Is there potential for the district to provide a significant amount of new revenue for the Nation?

## 1. ONEIDA BUSINESS PARK (CENTRAL ONEIDA)

The Oneida Business Park located in Central Oneida is one of the most underutilized properties on the Reservation. This district is also one of the most promising areas for new business growth and development for the Nation, given the existing infrastructure, tribal ownership of the site, and the Business Park's central location at the heart of the Reservation. With a proactive approach toward development of this property (potentially including both residential and commercial development), it can become a hub of economic activity for the Tribe.



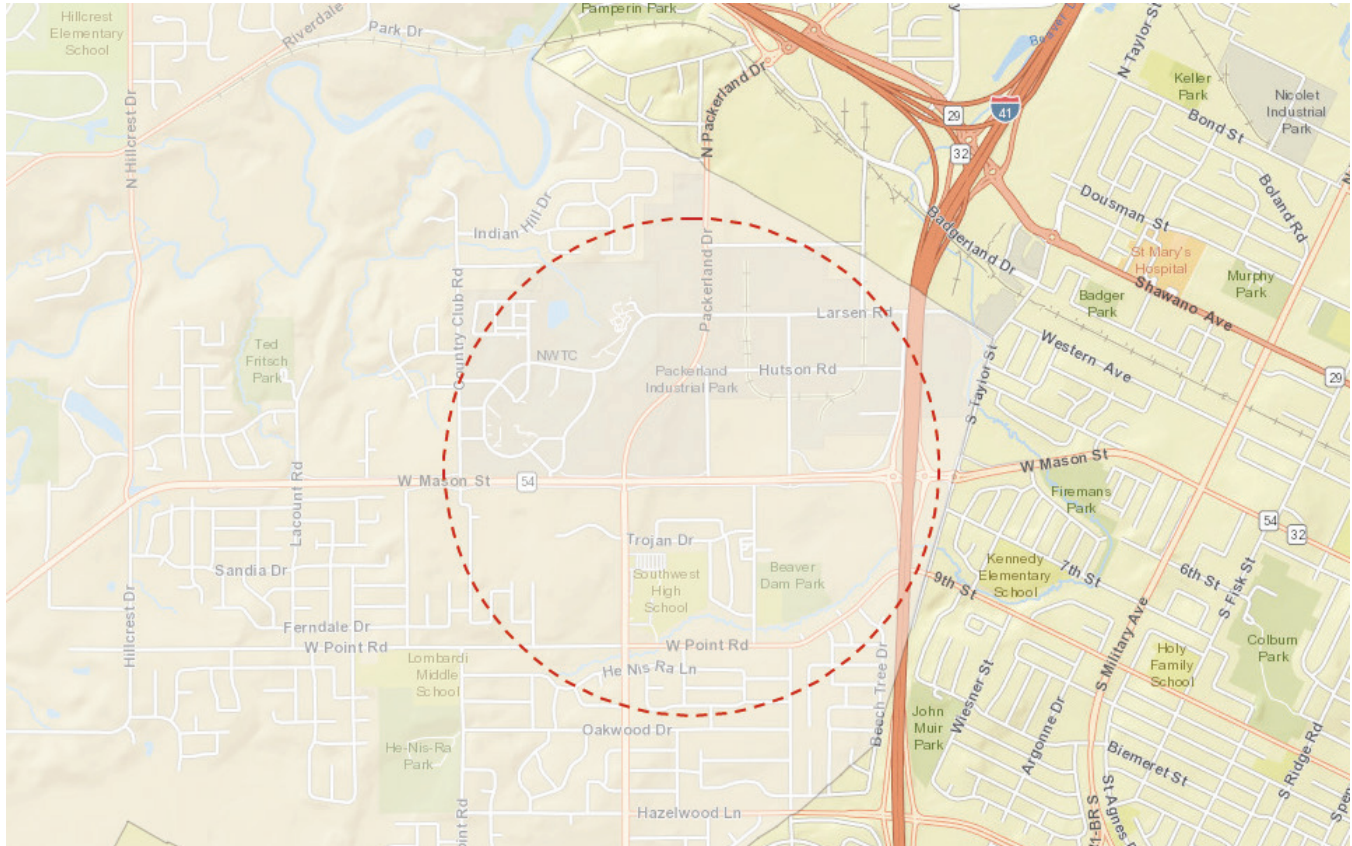
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CRITERIA	SCORE	COMMENTS
Size	●	Most parcels in the Oneida Business Park are vacant/available and the surrounding area also contains land that could be developed.
Infrastructure	●	The site is "shovel ready" from an infrastructure standpoint.
Tribal ownership	●	The site is owned by the Nation.
Land uses	●	Designation as a business park makes it suitable for commercial development.
Highway access	●	Direct access to Highway 54.
Arterial road access	●	Proximity to several arterial roads: County Line Road, Riverdale Drive, and Seminary Road.
Visibility	●	Moderate visibility along Highway 54.
Employment potential	●	Moderate level of new employment possible.
Revenue potential	●	Moderate level of new revenue possible.



## 2. RETAIL “GROUND ZERO” (I-41 AND HIGHWAY 54/MASON STREET)

The major commercial properties along Highway 54 (Mason Street) represent the most significant concentration of retail development on the Oneida Reservation and in all of Greater Green Bay. The district is also the most significant redevelopment opportunity for the Tribe, especially over a longer time frame (10 to 20 years), as some of the large big-box retail properties—Walmart, The Home Depot, Festival Foods—age beyond their typical lifespan.



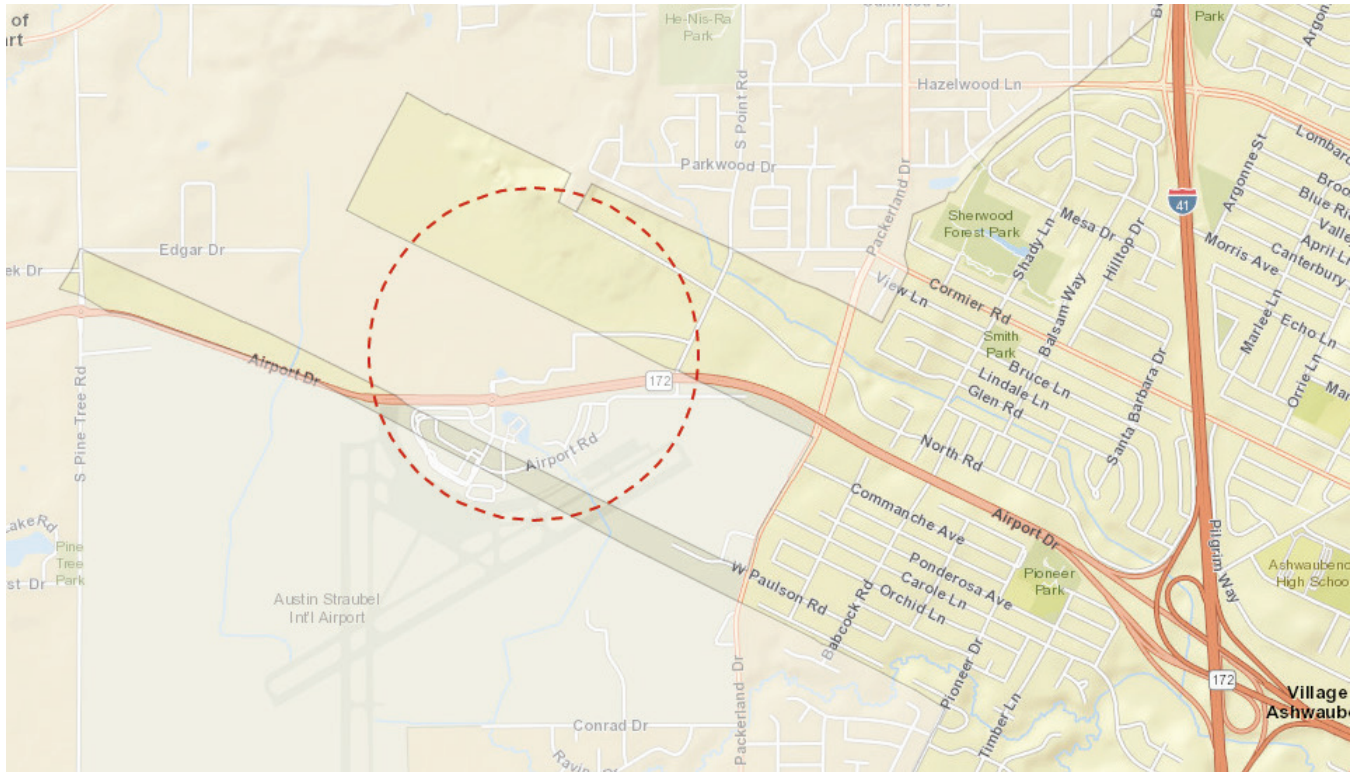
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CRITERIA	SCORE	COMMENTS
Size	●	Very large district (roughly 1,000 acres) of mostly commercial properties.
Infrastructure	●	Existing infrastructure serving major commercial, education, and industrial sites.
Tribal ownership	●	Tribal ownership of several major commercial sites (Walmart, Festival Foods, The Home Depot, and casino) but also other major landowners (NWTC).
Land uses	●	Includes major big-box retail, NWTC's main campus, healthcare, residential, and a few undeveloped properties with potential for new development, but most of the area would involve redevelopment of existing properties.
Highway access	●	Direct access to I-41, Highway 54, and proximity to Highway 32.
Arterial road access	●	Good connectivity along Packerland Drive, Mason Street, and Larsen Road.
Visibility	●	Very good visibility along I-41 and along Highway 54/Mason Street.
Employment potential	●	High level of new employment possible.
Revenue potential	●	High level of new revenue possible.



### 3. ONEIDA “ENTERTAINMENT DISTRICT” (RADISSON HOTEL & CONFERENCE CENTER, ONEIDA CASINO, AIRPORT)

The Oneida “Entertainment District” is the most significant visitor destination on the Reservation because of the cluster of attractions, including the Radisson Hotel & Conference Center, the Oneida Casino, and the Green Bay–Austin Straubel International Airport. The district benefits from visibility along Highway 172, proximity to I-41, and a steady stream of business and leisure travelers arriving to and departing from the airport. Development of additional entertainment destinations, amenities (such as restaurants and retail), and complementary uses (potentially including hotels and residential development) can help maintain and enhance the viability of this area over the long run.

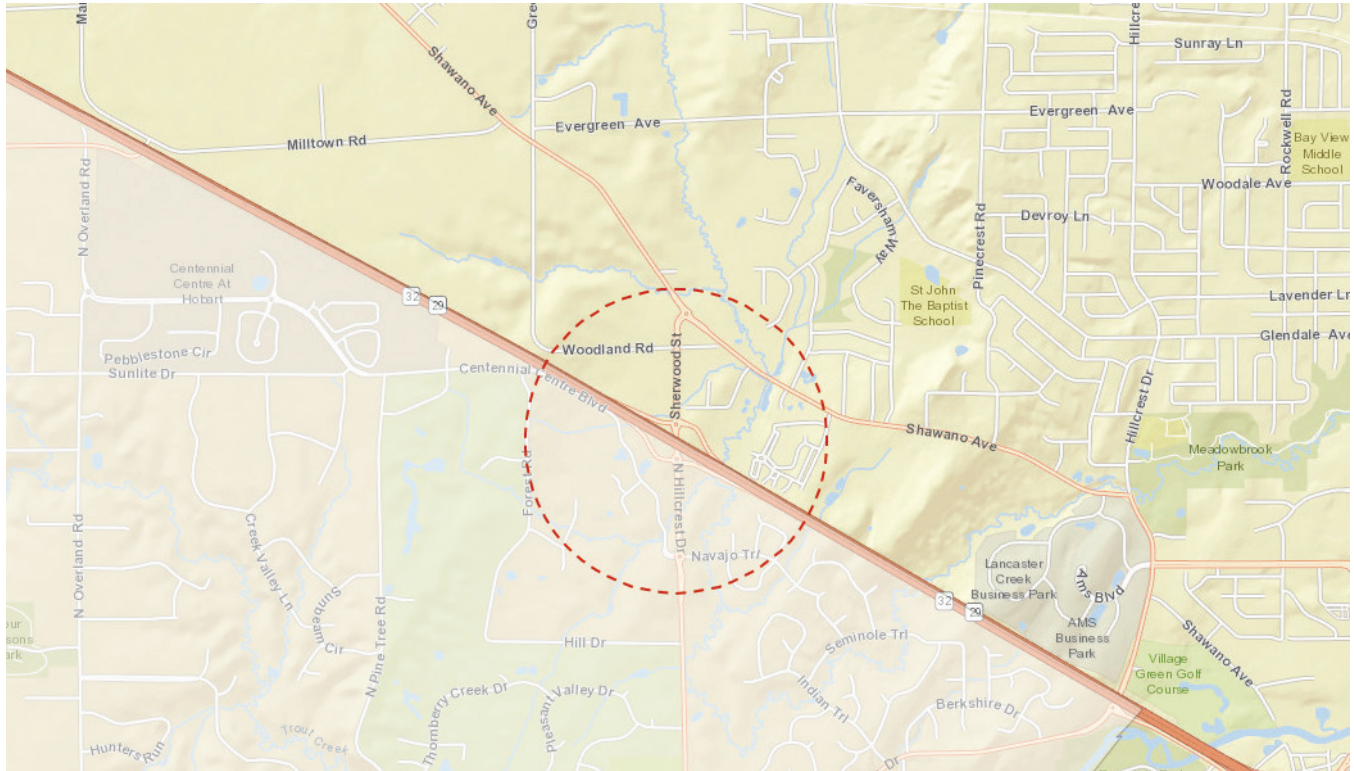


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CRITERIA	SCORE	COMMENTS
Size	●	Large district with redevelopment potential and new development potential on both sides (east and west) of the existing hotel/casino complex.
Infrastructure	●	Existing infrastructure serving the district.
Tribal ownership	●	Tribal ownership of major commercial sites in district, but no control over airport.
Land uses	●	Airport is a huge plus; landfill site is a negative.
Highway access	●	Highway 172 and proximity (2 miles) to I-41.
Arterial road access	●	Access along Packerland Drive.
Visibility	●	Good visibility along Highway 172, Packerland Drive, and across from airport.
Employment potential	●	Moderate level of new employment possible.
Revenue potential	●	Moderate level of new revenue possible.

## 4. HIGHWAY 29 AND HILLCREST ROAD

The properties at the intersection of Highway 29 and Hillcrest Road will become increasingly well-positioned for commercial development over the next decade, especially as the village of Howard continues its westward growth.

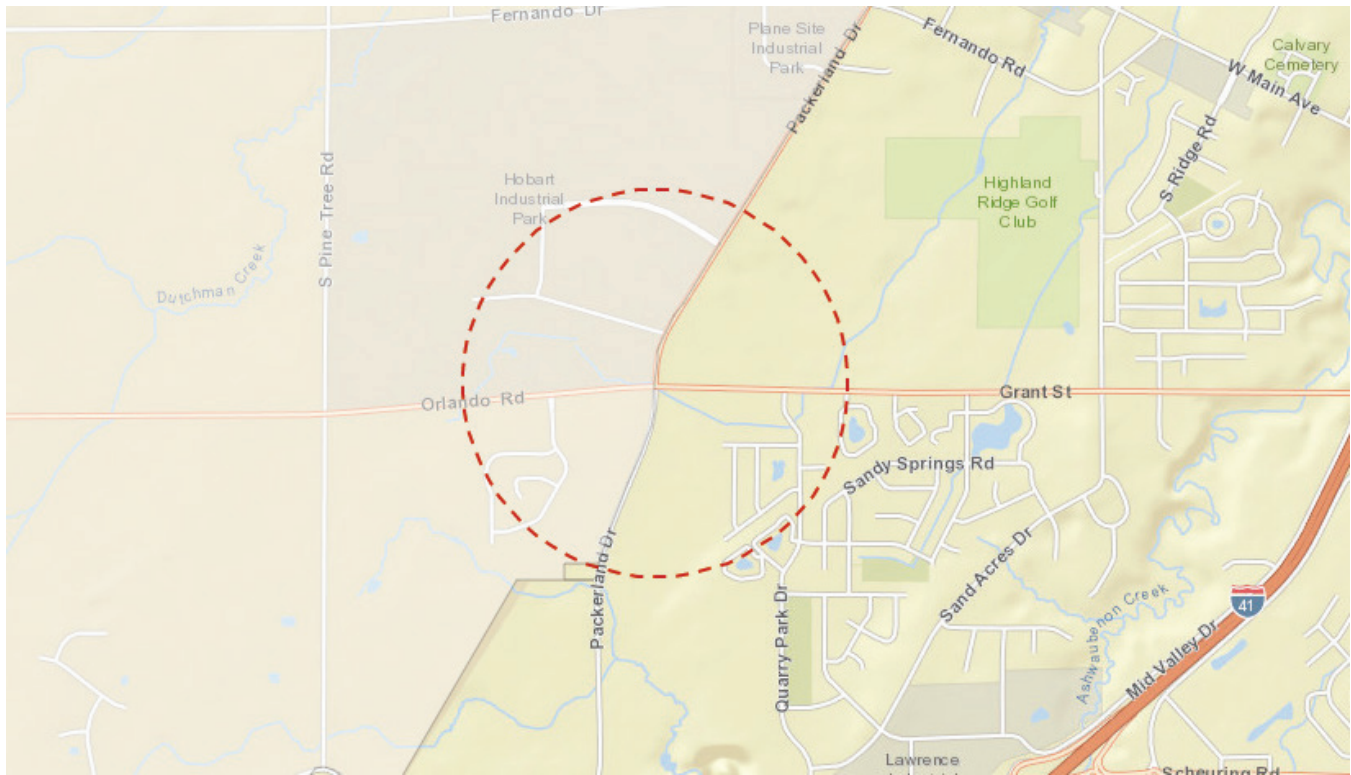


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CRITERIA	SCORE	COMMENTS
Size	●	Relatively small area (roughly 30 acres) suitable for development at the southeast corner of Hillcrest Drive and Highway 29.
Infrastructure	●	Some existing infrastructure, but additional investments likely needed to support new development.
Tribal ownership	●	Not currently owned by the Nation, but potential for acquisition.
Land uses	●	Existing land uses at the intersection include a small office complex and vacant properties; surrounding areas are residential.
Highway access	●	Direct access to Highway 29.
Arterial road access	●	Direct access to Hillcrest Drive.
Visibility	●	Moderate visibility along Highway 29.
Employment potential	●	Moderate level of new employment possible.
Revenue potential	●	Moderate level of new revenue possible.

## 5. PACKERLAND DRIVE AND GRANT STREET

The properties located at the intersection of Packerland Drive and Grant Street share similar characteristics as the district centered on Highway 29 and Hillcrest Drive. In this case, the growth of both the village of Ashwaubenon and the city of De Pere is moving in a westward direction toward the Reservation, along with Hobart's growth toward the south. Development of commercial and/or industrial properties by the Nation at this intersection will become increasingly viable.



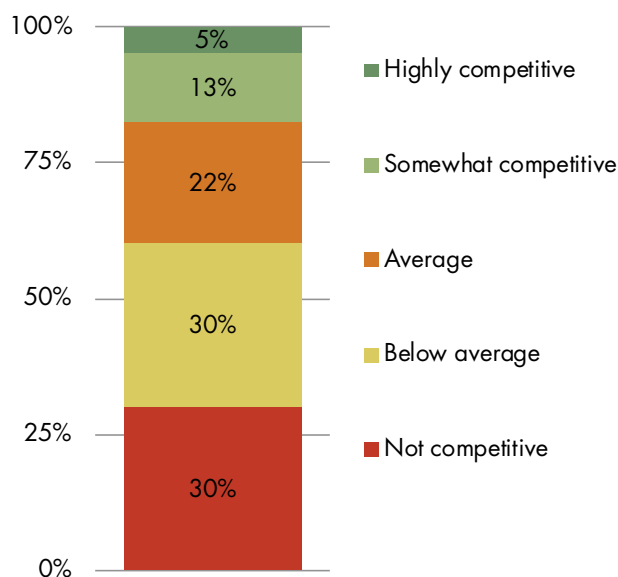
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CRITERIA	SCORE	COMMENTS
Size	●	Multiple moderately sized parcels within the district (roughly 25–50 acres) with development potential.
Infrastructure	●	Some existing infrastructure, but additional investments likely needed to support new development.
Tribal ownership	●	Not currently owned by the Nation, but potential for acquisition.
Land uses	●	Mixture of light industrial, agricultural, and residential uses in the area.
Highway access	●	No highway access, but about 2 miles west of I-41.
Arterial road access	●	Direct access to Packerland Drive and Grant Street.
Visibility	●	Limited visibility due to location away from highways and major activity centers.
Employment potential	●	Moderate level of new employment possible.
Revenue potential	●	Moderate level of new revenue possible.

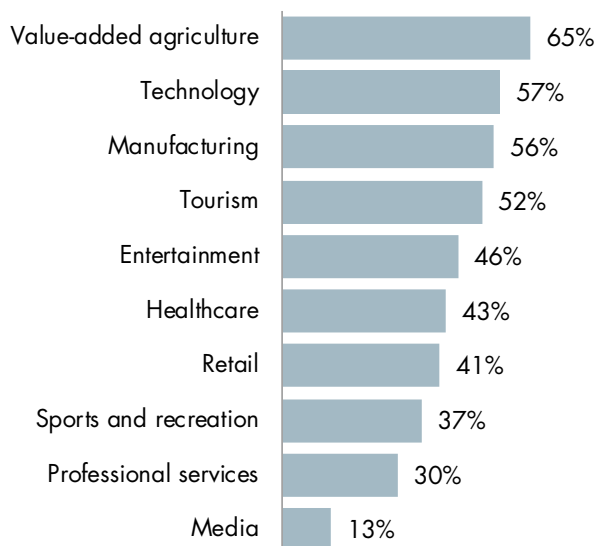
## APPENDIX 2. SURVEY HIGHLIGHTS

As part of the planning process, the Oneida Nation conducted an online survey of tribal members. The objective of the survey was to elicit respondents' views of the Nation's competitive position and document their thoughts on the region's opportunities and challenges. Selected questions from the survey are provided below. Additional details are available from the Oneida Nation.

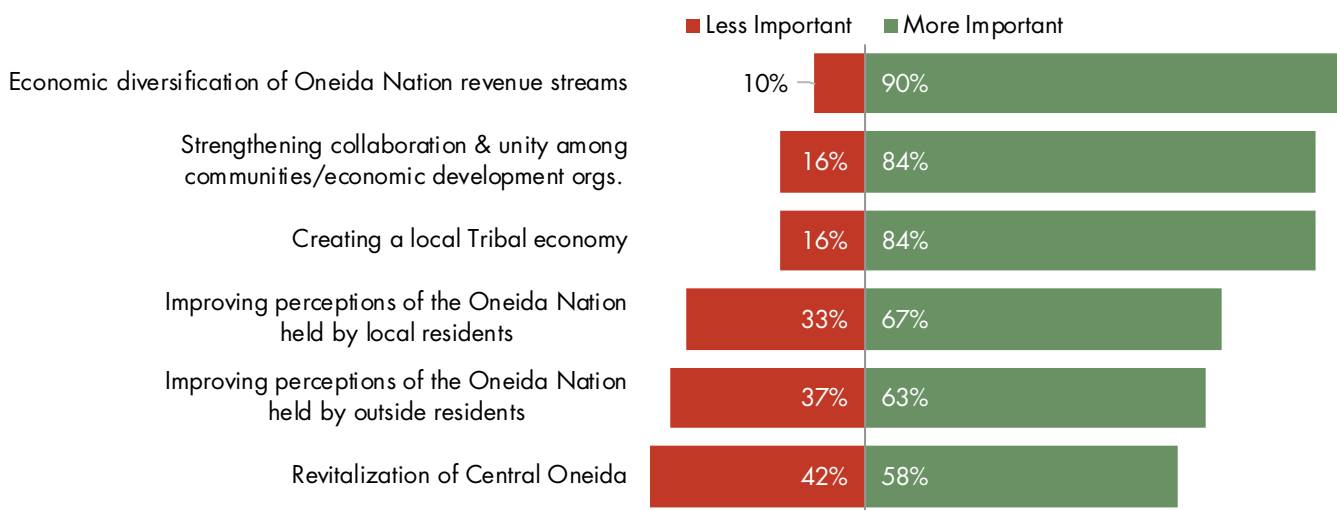
### Q: HOW DO YOU VIEW THE ONEIDA NATION'S COMPETITIVENESS FOR ATTRACTING NEW BUSINESS?



### Q: WHICH INDUSTRY SECTORS SHOULD THE NATION'S ECONOMIC DEVELOPMENT EFFORTS FOCUS ON ATTRACTING, RETAINING, AND GROWING ON THE ONEIDA RESERVATION?



### Q: WHAT ARE THE MOST IMPORTANT ISSUES FACING THE ONEIDA NATION OVER THE NEXT 5 TO 10 YEARS?

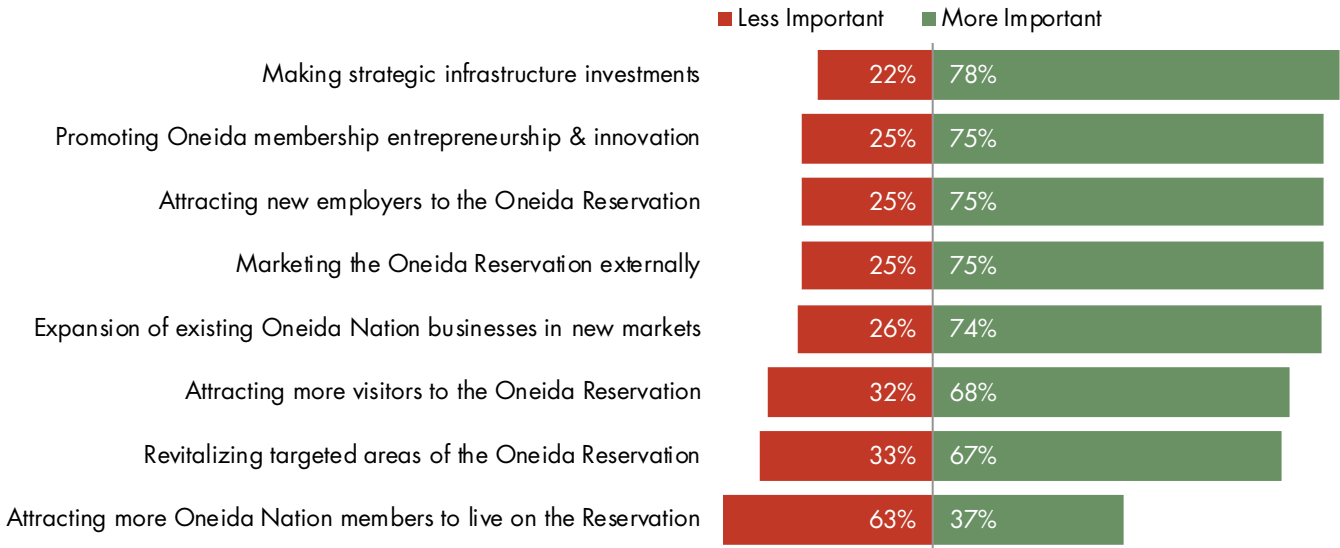


Note: More Important = Very Important and Important responses; Less Important = Moderately Important and Somewhat Important and Not Important responses.

Source (all figures this page): Oneida Nation survey.

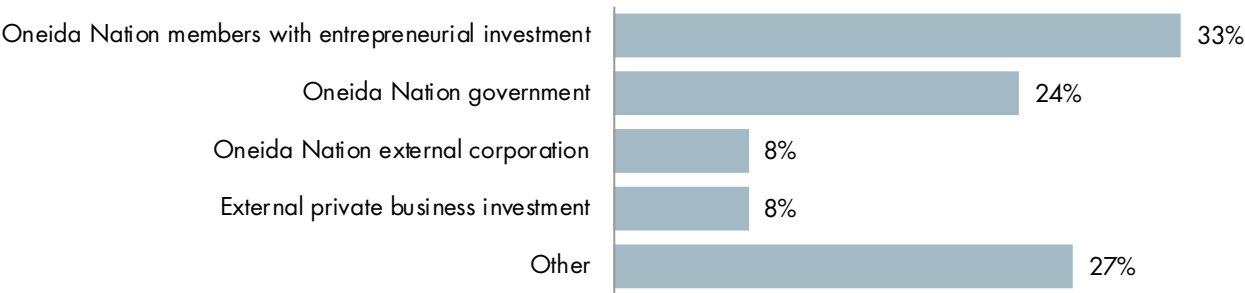


**Q: IN YOUR VIEW, WHICH ECONOMIC DEVELOPMENT ACTIVITIES ARE MOST CRITICAL TO ENHANCING ECONOMIC VITALITY ON THE ONEIDA RESERVATION?**

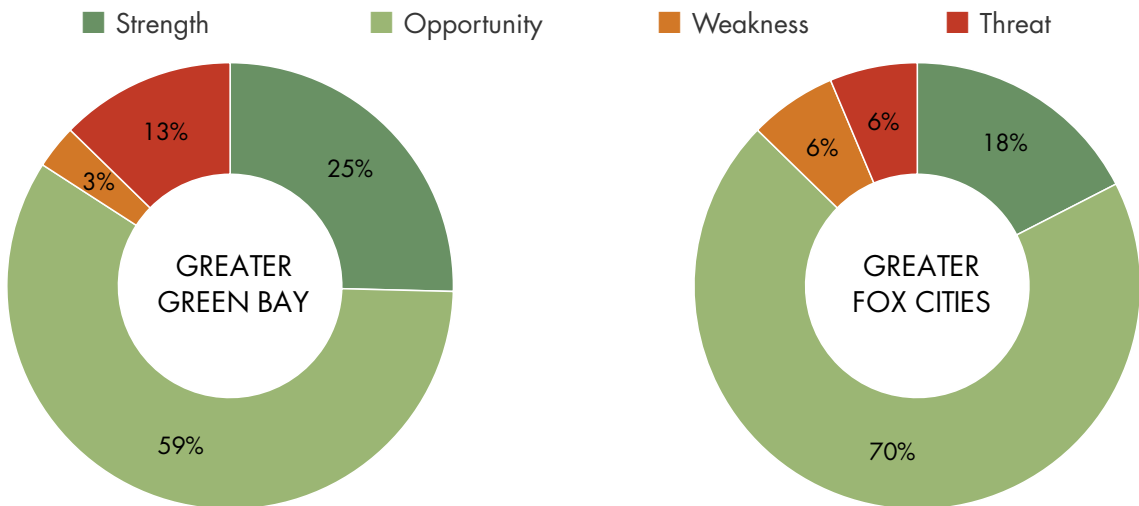


Note: More Important = Very Important and Important responses; Less Important = Moderately Important and Somewhat Important and Not Important responses.

**Q: WHO SHOULD DRIVE ECONOMIC DEVELOPMENT EFFORTS ON THE ONEIDA RESERVATION?**



**Q: AS IT IMPACTS THE ONEIDA RESERVATION ECONOMY, WOULD YOU CONSIDER THE FOLLOWING METRO AREAS TO BE MORE OF A STRENGTH, WEAKNESS, OPPORTUNITY, OR THREAT?**



Source (all figures this page): Oneida Nation survey. Greater Fox Cities are primarily Appleton, Kaukauna, Menasha, and Neenah.