

CITY OF WEST ALLIS
STRATEGIC PLANNING SERVICES
VERSION: 1/11/16

CONSULTANT SUBMISSION: For City of West Allis, Wisconsin

The following consultant submission, is proposed through a collaborative effort by Milwaukee County UW-Extension and Waukesha County UW-Extension.

Due to the nature of this project and the diverse roles requiring availability for emerging county-wide community education, this contract is submitted as a full/non-subcontract partnership for process co-facilitation with Dr. Angela Allen and Mr. Jerry Braatz as process co-facilitators of the strategic planning effort. Dr. Angela Allen is a Community, Natural Resources, and Economic Development Educator and Assistant Professor with the Milwaukee County UW-Extension. Mr. Jerry Braatz is the Waukesha County UW-Extension Department Head and Community Development Educator. Jerry is a certified planner with the American Institute of Certified Planners and is an Associate Professor

As a part of our contracted services, UW-Extension resources will be utilized by the process co-facilitators, and are described in the scope of services/methodology narrative. These resources include engaging UW-River Falls Survey Research Center and the UW-Extension Center for Community and Economic Development for specific contract service support as described.

FEE PROPOSAL/SCHEDULE

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Angela Allen, Assistant Professor @ \$53 per hour x 285 hours	\$15,032.00
Jerry Braatz, Associate Professor @ \$60 per hour x 432 hours	\$25,900.00
Supplies and Copies	\$570.00
Mileage (500 miles x .54 govt mileage rate)	\$270.00
Interdepartmental Charges (6.7%)	\$3,405.00
Administrative (Indirects) (9%)	\$4,800.00

- A. Fact Book \$600 for printing of 30 copies@ \$20
- B. Preparatory Interviews Included in Salaries
- C. Pre-meeting conference Included in Salaries
- D. Kick-Off Meeting/SWOT Analysis Included in Salaries
- E. Solicitation of Public Input \$ 6,000.00
- F. Recommendations Included in Salaries
- G. Draft Report Compilation Work Session(s) Included in Salaries
- H. Present Draft Report Included in Salaries
- I. Final Report \$450 for Printing of 30 copies@ \$15
- NOT-TO-EXCEED TOTAL** **\$ 57,108**

Date: January 15, 2016

Net 351 days

Payment Terms

Are credit card payment accepted?

First Installment: June 15, 2016

_____ yes no

Final Installment: December 15, 2016

COMPANY NAME: Milwaukee County
UW-Extension

COMPANY NAME: Waukesha County
UW-Extension

AUTHORIZED SIGNATURE

Angela D. Allen, PhD
Type or Print Name

AUTHORIZED SIGNATURE

Jerry E. Braatz
Type or Print Name

TITLE: Community, Natural Resources &
Economic Development (CNRED)
Educator/Faculty

TITLE: Department Head & Community,
Natural Resources & Economic
Development (CNRED) Educator/Faculty

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DESCRIPTION OF FIRM EXPERIENCE

Together, Dr. Angela Allen and Mr. Jerry Braatz bring over 20 years of direct experience in local governance strategic planning. As community economic development educators/faculty with UW-Extension, we are a part of over a century of services that bring the resources and developmental education of the University of Wisconsin system to the community priorities of community stakeholders in 72 counties statewide.

As county-based educators whose annual salaries and annual program plans of service are approved each year by our respective county boards, we are accountable to our counties and also to keeping time within our work each year available to meet the needs or otherwise address the priorities of our counties. At the time of this inquiry for availability by City of West Allis City Administrator Rebecca Grill, Dr. Allen already has one contract in process for service, but does have available time to effectively engage the full desired RFP. Dr. Allen asked if Mr. Braatz would be able to be a co-facilitator to provide the highest quality of process and plan facilitation and support in a collaborative effort. Moreover, together, we are able to utilize the following UW system resources to ensure the highest quality products described in this scope of services, engaging our UW-River Falls Survey Research Center and our UW-Extension Center for Community and Economic Development.

Both Dr. Allen and Mr. Braatz have direct experience providing the services described in the scope of services. The following includes the type and number of clients and the nature of projects each has engaged, to be considered in conjunction with our appendix of our respective resumes, references, and final strategic plan product exhibits for submission.

City of West Allis Services Requested	Dr. Allen's Experience that would apply to the City of West Allis' Requested Services	Mr. Braatz's Experience that would apply to the City of West Allis' Requested Services
Fact Book	Provided demographic summaries of communities as a part of comprehensive land use planning report publications (city of Detroit).	Collection, analysis, and presentation of demographic data for businesses, non-profit groups, and local government units in Wisconsin, Illinois, Barbados, St. Lucia, and Jamaica. Collected, analyzed and wrote all demographic chapters for the Waukesha County Comprehensive Development Plan. Compiled data and completed analysis for Waukesha County Health and Human Services Environmental Scan document.
Preparatory Interviews	Trained in both conducting and analyzing community engaged qualitative research interviews (conducted & coded/analyzed over	Trained in development and facilitation of focus groups. Experience conducting focus groups with communities in Wisconsin and Iowa. Quantitative experience analyzing data

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	20 formal community engaged interviews).	with SPSS and writing code with SAS. Also, have training and experience with qualitative data analysis. In 2015, qualitatively analyzed results of a Waukesha County Business Survey utilizing MAXQDA software.
Pre-meeting conference	Sept. to Nov. 2013 with Milwaukee County DPRC. Many previous pre-meeting conferences with various planning projects with communities, government agency representatives and non-profit organizations.	Conducted over a dozen pre-meeting conferences with various planning projects with communities and non-profit organizations.
Kick-Off Meeting/SWOT Analysis	Nov. 2013 with Milwaukee County DPRC, plus March 2014 staff and public input forums centered on SWOT analysis input	Trained in both SWOT and SOAR (Strengths, Opportunities, Aspirations, and Results) analysis. Utilized a SWOT and/or SOAR processes with the City of Waukesha Business Improvement District, Waukesha County Comprehensive Development Plan Committee, Waukesha County Drug Free Communities Coalition, Association for the Rights of Citizens with Handicaps, University of Wisconsin- Waukesha Field Station, and Waukesha County 4-H Leaders Association.
Solicitation of Public Input	March to November 2014 with Milwaukee County DPRC: March 2014 staff and public input forums centered on SWOT analysis input, and included two formal staff forum presentations January 2014 and 2015 (including preparing strategic planning team members to present participatory evaluation stories of their experience of the process as champions that also inspired staff to take up ongoing leadership of values and action items)	Developed and implemented a public participation plan for the Waukesha County Comprehensive Development Plan Process that included Waukesha County and 27 municipalities from 2007 to 2009. Developed and facilitated a public input forum for the Village of Summit in 2012. Developed and analyzed an online survey of Waukesha County business needs in 2015. Gathered input from business leaders on draft survey questions. Utilized this input to enhance survey questions.
Recommendations	Presented recommendations county board and parks committee. Presented previously about process updates to PEEC (committee of county board), Parks Advisory Commission 3 times each during	Presented recommendations of City of Waukesha Business Improvement District Strategic Plan to the BID Board and the City Council. Presented findings of 2013 City of Waukesha Business Retention and Expansion Survey to the City Council. Presented

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	process, prior to final recommendations, as inclusive participatory engagement.	recommendations of the UW-Waukesha Field Station strategic plan to the Field Station Committee, the Deans Council, and the UW-Waukesha Foundation.
Draft Report Compilation Work Session(s)	<ul style="list-style-type: none"> • 2013 - 2015 process engagement <ul style="list-style-type: none"> • 2 all-staff meetings (beginning & post-adoption: each interactive education sessions) • 6 staff forums (SWOT input): 120 staff • 5 public forums (SWOT input): 67 citizens • Survey (process & use): 205 respondents • Engaged the SPT in reviewing and contributing to final plan, Parks Advisory Commission, County Executive staff 	<p>Engaged citizens and elected officials from 27 municipalities and Waukesha County with the Waukesha County Comprehensive Development Plan effort.</p> <p>Engaged 55 residents in the Village of Summit Public Input forum</p> <p>Engaged 300 businesses in the Waukesha County online survey needs assessment.</p>
Present Draft Report	Presented November 2014 to PEEC, after completing online survey and engaging county executive staff recommendations.	Presented draft chapters of the Waukesha County Comprehensive Development Plan to the Development Plan Committee. Presented department budgets to County Executive, County Board Chair, County Executive Committee and County Finance Committee. Presented results of 2012 Village of Summit Survey to elected officials and citizens. Presented results of 2015 Waukesha County Business Survey to county business leaders.
Final Report	Completed January 2015 to DPRC staff and PEEC	<ul style="list-style-type: none"> • UW-Waukesha Field Station Strategic Plan • 2008 Waukesha BID Strategic Plan • Environmental Scan: Waukesha County Health and Human Services (HHS)

EXPERIENCE AND QUALIFICATIONS OF INDIVIDUALS PROVIDING SERVICES

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Dr. Angela Allen, Milwaukee County UW-Extension CNRED Educator/Faculty, began her employment in August 2013. She came into the position with twenty years of experience leading neighborhood/community and citywide comprehensive land use study development and community-engaged, comprehensive strategic revitalization initiatives, at local city, county/region, and national scale. Dr. Allen was one of four planner/coordinators for the 1997 City of Detroit Community Reinvestment Strategy, a \$1.5 million initiative completed on-time and on-budget, where she managed \$300,000 of the budget, directly supervising executive representatives from three planning firms alongside three of ten neighborhood boards who each developed individual “neighborhood cluster” plans that fed into an overall strategic initiative process report. Simultaneously, Dr. Allen led public and private process presentations that both educated and interactively engaged the input of community/cross-sector stakeholders and elected/public officials and department heads. In 2012, she was selected to lead the RESTORE Northeast Detroit collaborative of several neighborhood association, business association and block club leaders to co-author the successfully and fully funded Strategic Alliance Demonstration Project Grant (the only applicant to win the full \$25,000 grant award of those communities awarded the funds), and was contracted to lead the collaborative’s grant implementation strategy as they completed a community-led residential property survey and comprehensive land use strategic planning process. She also authored their post-grant award comprehensive fundraising strategy, as well as managed their online website and completed videography of community-engaged meetings/dialogues for ongoing place-making/transit-oriented development. In 2014, Dr. Allen was recognized by RESTORE NED leadership as the catalyst for their winning a \$500,000 ArtPlace America program grant award, continuing the work begun through the grant and processes with which she worked with them. Coming into her CNRED Educator/Faculty role, her first successful program was completing the process as lead process facilitator and plan co-author for Milwaukee County’s Department of Parks, Recreation and Culture five-year strategic plan, which included department-wide forums for staff participation and engagement, county-wide public forums for participation and engagement, and inclusion in the county’s online survey.

Jerry Braatz began working as a regional planner for the Greater Egypt Regional Planning Commission in Carbondale, Illinois in 1994. Jerry was responsible for water quality planning economic development planning and grants development. In 1997, Jerry became and instructor of community development with Calumet County University of Wisconsin-Extension. In 2001, Jerry joined the Waukesha County University of Wisconsin-Extension and in 2002 Jerry received tenure as an Associate Professor of Community Resource Development. Jerry has held certification as a certified planner with the American Institute of Certified Planners since 2001. In 2010, Jerry became the department head for the Waukesha County University of Wisconsin-Extension Department and oversees a diverse budget of funding resources.

Jerry Braatz has successfully won over \$4 million in grants over his career. Since 2001, almost half of his position with UW-Extension has been funded by grants and contracts. Jerry enjoys

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providing educational outreach programs and building community capacity that creates impact. Building capacity in residents is critical in helping communities identify assets and utilize strengths to address challenges and solve problems.

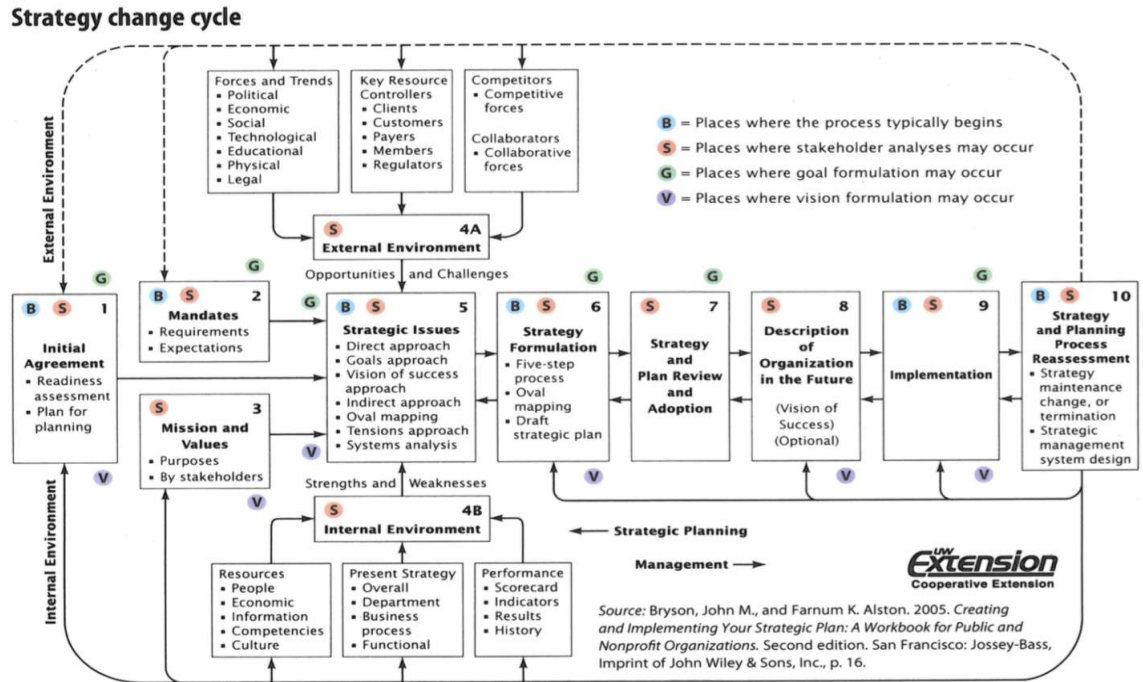
SERVICE DELIVERY METHOD

The proposed strategic planning approach for the City of West Allis' strategic planning services as request, used by UW-Extension and our statewide Strategic Planning Training team for almost twenty years is based from UW-Madison alum John Bryson's proven and research based strategic planning approach for public and nonprofit organizations (Bryson and Alston, 2011). The UW-Extension strategic planning framework/approach, provides specific, customizable steps to make this approach more "policy relevant." This proposed approach incorporates several features based on strategic planning and purpose-based planning concepts, including:

- A well developed "plan for planning" or detailed planning system design stage. Determining the people to involve (stakeholder analysis) is an important part of this step; as well as steps for diagnosis of a community's readiness to plan, and initial education
- A trends and assessment step that includes an external and internal assessment of the environment
- Specifics steps for mission review and development, with a visioning step that is integrated with values review/development/revision, and strategic issue framing
- Strategy formulation steps that enable the generation, organization and selection of preferred strategies after the development of alternatives. The process acknowledges the importance of both traditional "strategic plan" alternatives and narrative or "verbal" policy-oriented strategies.
- Plan management steps including plan review and approval, implementation and plan reassessment

These steps are graphically represented below (UW-Extension Strategic Planning Team, 2015).

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Here is an example of how Dr. Allen adapted this process for the Milwaukee County DPRC, which can be an example of how we would match the City of West Allis' desired outcomes to a strategic planning process timeline for public presentation.

Overview of the Strategic Planning Process



Last, the UW-Extension strategic planning process steps are customizable, adaptable to integrate other leading governance performance planning and metric models such as strategic doing, performance budgeting, LEAN planning, and other operational processes for optimum cross-department and agency performance.

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TIMELINE

The ideal timeline for providing the scope of services requirements, pending approved adoption and processing of contractual submission by the City of West Allis.

Service Activity to Complete	Expected Timeline (2016)
Fact Book	February
Preparatory Interviews	January - February
Pre-meeting conference	March
Kick-Off Meeting/SWOT Analysis	March - April
Solicitation of Public Input	May -June
Recommendations	July
Draft Report Compilation Work Session(s)	July - September
Present Draft Report	October
Final Report	November - December

DRAFT

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APPENDIX

Resumes, five references and final Strategic Plans from reference.

- Angela Allen, Milwaukee County UW-Extension final Strategic Plan products/references
 - Product: [2015 - 2020 Final Five Year Strategic Plan & Executive Summary, Milwaukee County Department of Parks, Recreation and Culture](#)
 - Lead process facilitator and plan co-author, process completed September 2013 to January 2015, plan adopted January 2015
 - References for Angela Allen
 - John Dargle, Director, Milwaukee County Department of Parks, Recreation and Culture, Email: John.Dargle@milwaukeecountywi.gov, Direct Phone: (414) 257-7275
 - Laura Schloesser, Chief of Administration and External Affairs, Milwaukee County Department of Parks, Recreation and Culture, Email: Laura.Schloesser@milwaukeecountywi.gov, Direct: (414) 257-7143, Cell: (414) 391-5127

Angela D. Allen



RELEVANT EMPLOYMENT EXPERIENCE

CNRED Educator (Tenure-Track Faculty) Present – AUGUST 2013
The University of Wisconsin – Extension, Milwaukee County

Educator and tenure-track faculty member in the Community, Natural Resources, and Economic Development (CNRED) program area. Partnering community knowledge/experience with university research/resources. Developing transformative community education & training programs that build organizational and/or leader capacity within & across the following sectors: local county & city governance, civic leaders/organizations, community residents & resident leaders.

- Facilitated two [UW-Extension Reimagined](#) public deliberative forums in Milwaukee to gather concerns toward UW-Extension statewide strategic planning and revitalized educational programming for our local county office.
 - Partnering with Wisconsin Extension colleagues and Oregon State colleagues who are developing a rural community issue guide launching in 2015, to develop an “urban issues guide” to launch at the 2016 Imagining America conference in Milwaukee.
 - Invited to and attended the May 2015 “Democracy’s Colleges” research learning exchange co-sponsored by Imagining America (Scott Peters and Tim Eatman) and Harry Boyte.

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- 20% time contracted from June 2014 to February 2016 with the [Institute for Urban Agriculture & Nutrition](#), a multi-institutional community-academic partnership formalizing into a cooperative as of fall 2015.
 - Interim convener and coordinator of the IUAN Community Collaborative Council, engaging multiple community food system stakeholders to co-create a participatory, community-based research and program agenda.
- Present – November 2013: Executive planning team member of the [Transform Milwaukee Collective Impact Initiative](#), a five-member state agency initiative coordinated by the Wisconsin Housing and Economic Development Authority (WHEDA). Engaging up to 150 civic stakeholders quarterly on the common agenda areas of economic development, community development and workforce development.
 - Interim convener of the Community Development Workgroup
- Adopted by County Board January 2015, process began November 2013: Lead facilitator, [Milwaukee County Department of Parks, Recreation and Culture 2015 – 2020 Strategic Plan Process](#) & plan co-author. Presented about process at 2015 state Joint Council of Extension Professionals (JCEP) conference.
- Winner of an \$8,000 University of Wisconsin-Extension East-Metro Region Resource Management Grant to hire a resident part-time for 8 months in the Amani neighborhood, as part of developing a resident engagement and leadership development program to support their US Department of Justice grant award for the Building Neighborhood Capacity Program. (March –October 2014)
 - Two results of this hire & the months of neighborhood association engagement that led into it:
 - Lead author of a community case study of the neighborhood’s resident engagement and impacts as one of several national and Canadian sites engaged with [the Population Change Learning Community](#) of UCLA and the Doris Duke Charitable Foundation. Anticipated publication fall 2015.
 - Co-coordinating a coalition of 37 community-serving organization leaders in partnership with LISC Milwaukee and Wisconsin Voices to develop a sustained educational program that helps everyday neighborhood and community residents understand the multiple initiatives impacting them, how to identify which outcomes are most important to them, and to use that information in their voice to build lasting relationships with elected, appointed and public officials, beyond voting and political issue advocacy, into deeper community change.

Consultant

RESTORE Northeast Detroit, Detroit, MI

JULY 2013 - AUGUST 2012

Contracted August 21, 2012 by resident-led organizational collaborative Residents Empowered, Strengthened and Transforming our Residential Environment after 10 months as a volunteer and committee member, and co-author of the successfully awarded \$25,000 Community Development Advocates of Detroit/Detroit LISC/Michigan Nonprofit Association Strategic Alliance Demonstration Project Grant (August 2012-January 2013).

- Recognized by RESTORE NED leadership via email in fall 2015 as the lead catalyst for the collaborative’s award of a \$500,000 ArtPlace America grant award in partnership with Allied Media Projects for their Create NED art-to-community placemaking and development program.
- Co-administered short-term grant workplan activities, including developing content, managing content for the RESTORE NED website (<http://www.restorened.org>) & developing an ongoing, resident leadership-led training to sustain the website.
- Supported meeting logistics & feedback to build leadership capacity to the

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organizational collaborative, as well as co-authoring the grant evaluation reports and the post-grant award fundraising strategy.

Senior Program Manager, Education & Outreach Programs APRIL – JANUARY 2011

Michigan Community Resources (formerly [Community Legal Resources](#)), [Detroit, MI](#)
Adviser and technical assistance coordinator to community leaders across 6 topic-based, city-wide summits as a part of Mayor Dave Bing's [Detroit Works Project](#) strategic planning process.

ABD Research Associate Fellowship

APRIL 2010 – AUGUST 2008

[The Charles F. Kettering Foundation, Dayton, OH](#)

Supported the Foundation President's and program officers' activities, including engagement in research projects in community politics and the public and the academy program areas, writing reports and reviewing literature. December 2009 – April 2010: co-author of an analysis of Kettering Foundation literature on civic capacity for their March 2010 Multinational Workshop, which was published by the Foundation.

[Michigan State University, East Lansing, MI](#)

JULY 2008 – FEBRUARY 2005

Graduate Assistant

- Supervised by the Associate Provost of University Outreach & Engagement as administrative coordinator across several projects.
- Co-created & led implementation of the [Emerging Engagement Scholars Workshop](#) at the 2007 National Outreach Scholarship Conference, a 3-day workshop that connects graduate student & early-career outreach faculty to work with established, tenured faculty mentors to infuse community based participatory research (CBPR) into their graduate programs & research. The workshop was institutionalized in its first year.
- Co-facilitated, as a part of the MSU-HBCU Faculty Development Network community-based participatory research (CBPR) partnership team, two site visits to introduce a systems evaluation and logic model process to scale up service-learning programs to CBPR [Tougaloo, MS & Jackson, MS].

[City of Detroit Planning and Development Department, Detroit, MI](#)

MARCH 1999 – JUNE 1996

Planner/Coordinator

- Managed three planning firm contracts totaling \$300,000 of the City of Detroit Community Reinvestment Strategy, a \$1.5 million initiative.
 - Facilitated the collaboration of three twenty-member community leadership boards as they worked with the three planning firms to create "neighborhood cluster planning reports" for the initiative.
- Assistant Coordinator of Detroit Census 2000.

Community Issue Organizer

APRIL 1996 - JULY 1995

Warren/Conner Development Coalition, Detroit, MI.

Americorps*VISTA Volunteer, coordinating community-based issue projects, including the Eastside Grocery Store Standards Committee, and the Eastside Land Use Study Group. Authored the Eastside Land Use Study Group Report in May 1996.

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EDUCATION

**Doctor of Philosophy
JUNE 2009**

College of Education: Michigan State University, East Lansing, MI.
Department of Educational Administration
Higher, Adult, and Lifelong Education Program

Interdisciplinary Graduate Specialization: Applied Developmental Science

Dissertation Research:

Faculty and Community Collaboration in Sustained Community-University Engagement Partnerships

- **Committee Members:** Kristen A. Renn (Chair), Marilyn J. Amey, James S. Fairweather, Hiram E. Fitzgerald (External Member – Associate Provost of University Outreach and Engagement)

**Master of Social Work
APRIL 2001**

School of Social Work: The University of Michigan, Ann Arbor, MI.
Community Organization - Children, Youth, and Families in Society

**Bachelor of Science
JUNE 1995**

College of Social Science, Michigan State University, East Lansing, MI.
Urban and Regional Planning

- **Senior Practicum Team Leader:** led a team of 23 undergraduate and graduate students who produced the two-volume neighborhood plan for the Detroit Empowerment Zone community represented by Fellowship Inc. Non-Profit Housing Corporation, still in use by Rev. James Perkins of Greater Christ Baptist Church.

PROFESSIONAL DEVELOPMENT

Center for Digital Storytelling Open Standard Workshop participant, April 2011, Washington DC: Learned digital storytelling, a method that has been used as program evaluation or individual/organizational marketing of program/experience impact. **Taking the 2015 webinar series [Digital Storytelling in Public Health \(April – December 2015\)](#)** to develop a fee-for-service or grant-funded educational program for cross-sector organization leaders and everyday citizens to create e-portfolios as a community impact assessment tool/skill that tells their story of impacting neighborhood and community change through their efforts beyond initiatives.

- Jerry Braatz, Waukesha County UW-Extension final Strategic Plan products (See Attached “Braatz Portfolio”)
 - References:

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- Jennifer Andrews, Community Development Director for the City of Waukesha, jmandrews@ci.waukesha.wi.us, (262) 524-3750
- Dale Shaver, Director, Waukesha County Department of Parks and Land Use, dshaver@waukeshacounty.gov, (262) 896-8310
- Larry Nelson, Waukesha County Supervisor, lnelson8@icloud.com, (262)542-4767

JERRY E. BRAATZ, AICP



POSITIONS HELD

2001-Present, Associate Professor of Community Development, Department of Community Resource Development, University of Wisconsin Cooperative Extension, Waukesha County

2010-Present, Department Head, University of Wisconsin Cooperative Extension, Waukesha County

2000-2001, Assistant Professor of Community Development, Department of Community Resource Development, University of Wisconsin Cooperative Extension, Calumet County

1997-2000, Instructor of Community Development, Department of Community Resource Development, University of Wisconsin Cooperative Extension, Calumet County

1994-1997, Regional Planner, Greater Egypt Regional Planning Commission, Carbondale, IL

MAJOR EDUCATIONAL PROGRAMS DEVELOPED

Small Business Development

Taught Going Solo: Building a Family Business to families in Waukesha, Wisconsin Neighborhood Revitalization Strategy Area neighborhoods (NRSA's). Over 110 Caucasian and Hispanic/Latino families completed this six-week course resulting in a total of eleven family business start-ups. Participants were introduced to entrepreneurship, identifying business opportunities, creativity and innovations, developing a product, target markets, promotional strategies, advertising, pricing strategies, risk management, record keeping and budgeting, selling and customer service, and developing a business plan. I taught the format for this course to thirty-five University of Illinois-Extension Educators and partnered to deliver this program with Will County University of Illinois Cooperative Extension in Joliet.

International Business Development

As a Farmer to Farmer Program volunteer, I trained Orga-KniX business partners in Montego Bay, Jamaica, how to develop an effective business plan. Facilitated and provided analysis of a mission statement, SWOT analysis, stakeholder analysis, organizational structure, customer base analysis, sales potential, target market, product marketing, analysis of export potential,

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and equipment needs and costs. These were all incorporated into the final business plan for Orga-KniX. I replicated this process with a group of agricultural producers in Barbados.

Strategic Planning

I provided strategic planning and organizational development education to non-profit groups and local government units in Waukesha County, Wisconsin. Examples of strategic planning processes include the development of a strategic plan for the Board of Directors of the Association of the Rights for Citizens with Handicaps, New Berlin Childcare Center, The Village of Hartland, Wisconsin, and the Waukesha Downtown Business Improvement District. In addition, I worked with our office staff team to develop strategic plans for the Phoenix Heights, Haertel Field, and West Side Neighborhood Revitalization Strategy Areas and the Waukesha County UW Cooperative Extension Department.

Comprehensive Planning

Taught educational programs to the Village of Chenequa, and the City of Waukesha in the areas of long-range planning, citizen participation, and planning implementation. These efforts led to the creation and adoption of comprehensive plans in both communities. Twenty-seven municipalities worked with Waukesha County (population 392,000) on an update of the Waukesha County Development Plan. My role included the development and implementation of a public participation plan, co-facilitating planning meetings, collecting and analyzing data, and writing and editing plan chapters.

Organizational Development

Serve as department head for Waukesha County UW Cooperative Extension. Responsibilities include building leadership capacity in our staff team, teaching and implementing educational program outreach, facilitating strategic planning processes, coaching staff, and developing grants and budgets.

Public Participation Methods

I developed surveys that gathered and analyzed public input. I analyzed public opinion surveys focusing on Calumet County labor market analysis, Waukesha County comprehensive land use planning, Waukesha County regional library user needs, and Town of Merton future library needs assessment. I presented the results of these surveys to committee members, business leaders, residents, and government officials and staff.

I utilized focus groups as a tool to analyze public opinion. Conducted focus groups for the New Berlin Childcare Center, Calumet County Tourism Association, the New Berlin Human Resource Committee, and Association for the Rights of Citizens with Handicaps (ARcH), the Waukesha County Drug Free Communities, and the Phoenix Heights Learning Community. In addition, trained AmeriCorps Vista interns how to conduct focus groups with residents in the Phoenix Heights and Haertel Field neighborhoods in Waukesha.

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LEADERSHIP AND MANAGEMENT EXPERIENCE

County Needs Assessments

Designed needs assessments processes in Calumet County to engage the public and identify local programming needs for the UW Cooperative Extension office. Tools used to conduct assessments included key informant interviews, focus groups, and surveys. Presented this information to county board members, municipal government officials, and business leaders. I also communicated these needs to local and regional media through news releases and interviews.

Plans of Work

Mentored community development educators in Ozaukee and Milwaukee counties with the development of program plans of works and evaluation plans to meet local needs. Reviewed draft plans, made constructive comments and coached staff to help them improve their work plans. In addition, coached community educators working on the development of annual plans of work for NRSA neighborhoods.

Program Evaluation

Designed evaluations for programs in the area of community and economic development. Evaluations focused on increased level of learning, program impact, and suggestions for program improvement. The impacts were shared with granting agencies, federal agencies, state agencies, county boards, county administrators, business leaders, university staff, and local government officials to educate them about the importance of research and local program outreach. I worked with neighborhood residents and non-profit organizations to build specific measurements into the updated Phoenix Heights Neighborhood Revitalization Strategy Area Plan to evaluate progress and goal implementation.

Volunteer Leadership

Developed a lake management coalition with 50 volunteers who were responsible for lake and water quality monitoring techniques on 30 lakes in southern Illinois. Utilized volunteers over my seventeen year extension career to deliver programs in downtown and neighborhood revitalization, small business development, business market analysis, tourism development, labor market analysis, strategic planning, and comprehensive planning.

Wisconsin Extension Community Development Association

I served in leadership positions for nine years for the Wisconsin Extension Community Development Association Board of Directors. Officer positions held included treasurer, president-elect, and president. Responsibilities included budgeting, membership recruitment, oversight of the board of directors, and representing the organization at state and national conferences.

Responsibility Based Culture

One of twenty-three chosen within UW Cooperative Extension to teach responsibility based culture. Educated Twenty-one management staff and ninety-five staff personnel throughout Wisconsin on responsibility based culture that taught shared leadership and building trusting relationships skills.

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Civil Rights Program

I coordinated civil rights management and documentation for the Waukesha County UW Cooperative Extension office with Laura Dombrock. Responsibilities include working with the general office and staff from each program area to make certain that programs were reaching underserved audiences within Waukesha County.

Political Effectiveness and Fund Development

Collaborated, developed relationships and built capacity with local, state, and federal elected officials. I presented educational programs to local and state legislators and staff. Visited with local, state, and federal elected officials in one-on-one settings to explain the importance of UW Cooperative Extension programs and emphasize the impacts that these programs provided to their constituents. Represented the University of Wisconsin Cooperative Extension at two national Public Issues Leadership Development (PILD) conferences in Washington D.C.

I successfully received and administered \$4 million in grants over my UW Cooperative Extension career to enhance local educational programming needs and to provide funding for staff. I developed narratives, budgets, work plans, and evaluations. I recently completed the Year 6 grant narrative and budget for the Waukesha County Drug Free Communities grant. I served a three-year term on a grant review committee for the Wisconsin Department of Administration. My responsibilities included reviewing and scoring grant applications for the Wisconsin Comprehensive Plan grant program. I also served as a federal grant reviewer for two years for the U.S. Department of Health and Human Services Substance Abuse and Mental Health Services Administration.

Budget Development and Forecasting

During the 2011 Waukesha County UW Cooperative Extension budget process, I engaged our office staff team, and budget division analyst in the development of the 2011, 2012, 2013, 2014 and 2015 Waukesha County UW Cooperative Extension operating budgets. Present budget with objectives to County Executive, County Board Chair, County Executive Committee, County Finance Committee and the UW-Extension Administrative Committee.

EDUCATION

Master of Arts, Geography and Regional Planning (1994) Western Illinois University, Macomb, IL

Bachelor of Science, Geography (1992) University of Wisconsin-Oshkosh, Oshkosh, WI

Since 2001, I maintained certified planner status with the American Institute of Certified Planners. I completed 48 hours of continuing education units over the past eighteen months to maintain certification. Topics included ethics, organizational development, leadership, planning law, affordable workforce housing, and negotiation.