

**SUMMARY REPORT of the Green Lake County  
Economic Development Corporation's 2004 – 2007  
Strategic Plan**

**Highlighting the 2004 Goals and Strategies**

**Prepared by UWEX Office  
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**Green Lake County Economic Development Corporation**  
Strategic Planning Initiative: 2004 - 2007

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## **What is Strategic Planning?**

Strategic Planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it (Bryson, 1995). The strategic planning process is really about getting people together to talk about what is important, and then doing something about it. The process allows organizations to:

- Examine the environment in which they exist and operate
- Explore the factors and trends that affect the way they do business and carry out their roles
- Seek to meet their mandates and fulfill their mission
- Frame the strategic issues they must address
- Find ways to address these issues

The benefits of strategic planning are numerous. An organization can increase effectiveness and efficiency; improve understanding through better learning; make better decisions; enhance organizational capabilities; improve communication and public relations; and increase political support. As per the Corporation's Bylaws they are obligated to complete an annual plan, this document will satisfy that obligation.

### ***The Green Lake County Economic Development Corporation Strategic Planning Process:***

The Green Lake County Economic Development Corporation hence will be called GLC-EDC, established a strategic planning protocol in April 2003. The GLC-EDC is a group of volunteers appointed by the County Board Chairman to represent the entire county on items relating to economic development (see page 2). The Board met eight (8) times from June through November of 2003 developing this plan. This plan is the blueprint for the Board's activities from 2004 – 2007; the priority issues of 2004 are highlighted with corresponding strategies in a separate section.

Following a ten-step strategic planning approach, the Economic Development Corporation developed the information contained in this summary report (a schematic diagram of the strategic planning process they used is included in the Appendix, at the end of the report). This summary report will be available for viewing from the County Clerks office or the UW-Extension office in the Green Lake County Courthouse.

## **Step 1: Plan for the Plan**

The purpose of the Plan for the Plan step is to develop a profile of the strategic planning process. It involves defining:

- Purposes of the effort
- Desired outcomes of the effort
- Expectations of participants
- Resources needed to complete the effort
- A process timeline

Participants defined the purpose of the strategic planning process as the development of a comprehensive strategic plan that provides a foundation for the Economic Development Corporation action over the next 4 years.

## **Step 2: Organizational Mandates / Expectations**

Mandates prescribe what must or should be done under the organization's charter and policies, as well as under federal, state, and local laws, codes, and regulations. A mandate can be expressed formally or informally, through elections, community expectations, legislation, policy, regulations, procedures, and budget requirements (Bryson, 1995).

The GLC-EDC operates under formal and informal (better stated as expectations) mandates.

### **Formal Mandates**

Articles of Incorporation, 501 c3

Green Lake County Resolution # 11-90

State of Wisconsin Revolving Loan Fund Guidelines (9964.AI)

Community Development Block Grant for Housing Guidelines

### **Informal Mandates:** {Expectations}

County Board expects the corporation to address all economic development issues

Schools look to the EDC to promote job creation

Churches expect the Corporation will want safe communities

GL-EDC shall consider the needs of the taxpayers in the county

GL-EDC will provide assistance for local businesses

GL-EDC shall work with local banks

GL-EDC should assist job seekers find employment

GL-EDC shall assist municipal governments in county in economic development efforts

GL-EDC should assist in providing promotion assistance for tourists

GL-EDC shall assist Chamber of Commerce with their work

GL-EDC should assist service clubs that desire assistance with community projects

### **Step 3: Identify Stakeholders and Develop Mission**

The key to success for public and nonprofit organizations is satisfying important stakeholders according to each stakeholder's criteria for satisfaction. Mission should therefore be thought about in relation to those stakeholders (Bryson, 1995).

#### **Stakeholders:**

A stakeholder is any person, group, or organization that can place a claim on the organization's resources, attention, or output, or is affected by its output (Bryson, 1995). The following stakeholders were identified (those in bold were deemed to be key stakeholders):

- **County Board**
  - **County Board Chairman**
- **Revolving Loan Fund recipients**
- **State of Wisconsin (Dept. of Commerce and Housing)**
- **County tax payers**
- **Businesses in Green Lake County**
- **Local banks**
- Green Lake County, Finance Committee
- County Agribusinesses
- Green Lake County Clerk's office
- University of Wisconsin Extension office
- County healthcare institutions
- Chambers of Commerce in county
- Municipalities in Green Lake County
- Media
- Human Services
- Utilities
- Churches
- Area schools - K-12
- Law Enforcement departments
- Service clubs
- Technical Colleges
- Municipality's Economic Development Corporations
- Job Service
- Department of Workforce Development
- Tri-County economic development effort

For each key stakeholder group, participants are asked to develop the following information related to how that specific group might evaluate the organization's performance.

#### **County Board (County Board Chairman)**

*What specific criteria does this key stakeholder (group) use to evaluate the actions of the Green Lake County Economic Development Corporation?*

- Public Opinion
- Discussions with Corporation Board members

- Annual and Monthly meetings
- Feedback from County Board
- Feedback from other elected officials in the County
- Feedback from constituents
- Extent the Revolving Loan fund is used
- Jobs created
- Existing businesses retained
- Minutes from the Monthly meetings
- Appropriation of funds
- By the adherence to proper rules and regulations

*How do they influence us?*

- Appointing members
- Appointing governing committee
- Financial support
- County Board Member on the Corporation
- Approve Actions
- Recommendations for good members
- Offer Direction
- Evaluate our performance

*What do we need from them?*

- Cooperation and appointments of informed members
- Approval of recommended projects
- Appointment of members
- Collaboration
- Financial support
- Direction
- Confidence
- Flexibility
- Support

### **Revolving Loan Fund Recipients**

*What specific criteria does this key stakeholder (group) use to evaluate the actions of the Green Lake County Economic Development Corporation?*

- Limits on Funding
- Denials and Reasons for Denial
- Action by Corporation on Requests
- Fair and equitable action from the Board
- How are the funds used
- Is the loan helpful to overcome financial obstacles
- Corporation's response to concerns
- Unbiased analysis of loan

*How do they influence us?*

- Future Funding
- Development of loan criteria
- Their applications give the Corporation a reason to exist
- Business expansions
- Timely repayments
- Satisfaction with the program
- Defaulting on loans
- Recommendations to other businesses

*What do we need from them?*

- Accurate data
- Performance
- Action
- Timely repayment of loans
- Applications
- Feedback on the process, application, affordability, loan financials
- Job creation
- Business expansion and retention
- Compliance

**State of Wisconsin (Dept. of Commerce and Housing)**

*What specific criteria does this key stakeholder (group) use to evaluate the actions of the Green Lake County Economic Development Corporation?*

- Semi-annual report
- Our making intelligent loans to the right type of businesses
- Compliance with statutes
- Oversight in the implementation of the rules and regulation
- Review our use of funds

*How do they influence us?*

- Funding
- Changes in loan program rules
- They administer programs
- They set the standards

*What do we need from them?*

- Block grant dollars
- Cooperation with County and Local Governments in County
- Flexibility
- Guidelines for administration of loan funds
- Trust and assurance of our ability to administer the program
- Direction
- Loan criteria

### **County Tax Payers**

*What specific criteria does this key stakeholder (group) use to evaluate the actions of the Green Lake County Economic Development Corporation?*

- Is it a benefit to them and the County
- Are jobs being added
- Availability of funding
- Proper management of funds
- By the kind of communication with applicants
- Minutes
- Are the loans contributing to the success of the business
- Are they getting their monies worth
- Is the Board increasing the tax base
- News releases

*How do they influence us?*

- Through the elected officials of the County
- By submitting applications
- By being vocal both negatively and positively
- With referrals

*What do we need from them?*

- Input on questionnaires
- We need their scrutiny of the Board's actions
- Their support
- Positive feedback and understanding
- To serve as a member on the Board
- Good, supportive Board members
- Their approval

### **Businesses in Green Lake County**

*What specific criteria does this key stakeholder (group) use to evaluate the actions of the Green Lake County Economic Development Corporation?*

- Is the Board making enough funds available
- Bank references
- The ability of the Corporation to help businesses

*How do they influence us?*

- Support with tax dollars
- By applying or not applying for loans
- Participation
- Use of services
- By improving the local economy

*What do we need from them?*

- Interest from them
- Their satisfaction
- Use of services
- Mentoring
- Feedback
- References
- Their trust and understanding
- Input on the program
- Their business data (retention purposes)

### **Local banks**

*What specific criteria does this key stakeholder (group) use to evaluate the actions of the Green Lake County Economic Development Corporation?*

- The due diligence done by the Board is accurate
- What affect the Board's actions have on local businesses
- Cooperative relationship between Board and Bank
- Jobs created
- Success in business retention and attraction

*How do they influence us?*

- By providing contacts and applicants
- Their funding
- By serving on the committee
- Partnering and mentoring in the loan process

*What do we need from them?*

- Understanding
- Applicants for programs
- Assistance with funding
- Sharing of information
- Cohesive working relationship
- Active promotion of the program
- Their endorsement
- Financial expertise
- Their cooperation

## **Mission Statement:**

A mission or purpose statement is a definition of the organization's reason for existence – what it does. The Green Lake County Economic Development Corporation developed the following Mission Statement.

Participants reviewed the purpose statements from their By-Laws and decided the following purpose statement represents the Corporation's Mission.

The Mission Statement reads:

*The Mission of the Green Lake County Economic Development Corporation is to Promote, Attract, Stimulate, Rehabilitate and Revitalize Commerce Industry, and Manufacturing in Green Lake County.*

## **Step 4: Assessing the Environment**

The purpose of this activity is to identify the internal strengths and weaknesses of the organization, along with the organization's external opportunities and threats. The analysis of these four elements, known by the acronym SWOT, is very useful in clarifying the conditions within which an organization operates. A SWOT analysis provides valuable clues about probable effective strategies, since every strategy builds on strengths and takes advantage of opportunities, while it overcomes or minimizes the effects of weaknesses and threats. (Bryson, 1995)

Board members identified the following internal strengths and weaknesses as well as external opportunities and threats.

**Strengths:** Are internal capacities (i.e. Board member expertise, internal resources available) that help the Corporation accomplish its mandates or mission. Board members identified the following strengths inherent to their personnel and structure. This list is in no particular order of importance.

### **Strengths of the Green Lake County Economic Development Corporation**

- Ability to act fast
- Diversity and experience of Board members
- Familiarity of counties business owners with Board members
- Board members knowledge of local businesses
- Ease of revolving loan fund application
- Board works well together
- Corporation's ability to help the county
- Corporation's support of and partnering with other county organizations
- Ability to improve the county's housing needs
- Ability to act as a financial and referral resource for businesses

**Weaknesses:** Are internal deficiencies (i.e. Within Board personnel or available resources) that hinder the Corporation in accomplishing its mandates or mission. Board members identified the following weaknesses inherent to the their personnel and structure. This list is in no particular order of importance.

**Weaknesses of the Green Lake County Economic Development Corporation**

- Limited financial resources
- Lack of ability to increase the citizens awareness of program
- Limited exposure of program at banks
- Board representation does not always include entire county
- Volunteer Board
- No professional staff to do work

**Threats:** Are external considerations (i.e. people or matters outside the organization) that can affect the Corporation in a negative way. Board members identified the following threats that may make it difficult to complete their mission. This list is in no particular order of importance.

**Threats to the Green Lake County Economic Development Corporation**

- Reductions in Budgets
  - State
  - County
  - Municipalities
- Increased Unemployment
  - Labor force issues
- Too Restrictive Zoning Regulations
- Additional Rules and Regulations for Business
  - State
  - County
- Downturn in the Economy
- Reduced Public Appropriations
  - State
  - County
- Adverse Legislation from:
  - State
  - County
  - Municipalities
- Lack of Basic Business Base
- Distance from major highways/interstate

**Opportunities:** Are external considerations (i.e. people or matters outside the organization) that can affect the Corporation in a positive way. Board members identified the following opportunities that can help the Corporation complete their mission. This list is in no particular order of importance.

- Inventory of available sites and buildings

- Increases Tourist numbers
- Second home residents within the county
  - Make use of them as a network (mentor)
- Targeted Programs at Moraine Park Technical College
- Stronger Collaboration efforts with agencies within the county
- Improved Internet presence
  - Corporation web site
  - County web site
  - Improve the technology
- Chambers of Commerce
- Continuance of the Superior Quality of Life in county
- Stronger Inter-Department cooperation within the county
- Possibility of a multi-county ED professional
- Momentum toward Regional Cooperation in ED

### **Step 5: Identifying Strategic Issues**

A strategic issue/goal is a fundamental challenge affecting an organization's mandates, mission, product or service level and mix, clients or users, costs, financing, organization or management. The identification of strategic issues/goals is the heart of the strategic planning process (Bryson, 1995).

Participants identified the following strategic issues/goals necessary for the Economic Development Corporation to satisfy its Mission, which is to:

*Promote, Attract, Stimulate, Rehabilitate and Revitalize Commerce Industry, and Manufacturing in Green Lake County*

Following is a complete list of the strategic issues/goals that the Corporation identified in this planning initiative. The issues/goals that they are going to act on in 2004 are listed in the priority issues/goals section. In this section the strategic issue/goal is presented first, followed by a listing of statements that formed the issue/goal.

#### **Strategic Issue/Goal 1:      What should the Corporation do to assist / benefit existing businesses?**

- We need to make businesses aware of state help that may be available to them
- Develop a mentor program
- Business Visits to Determine Needs
  - Visit businesses to listen to their concerns and address them
  - Board members should visit key employers to get their concerns. W/I 6 months
  - Visit local businesses employing over 10 persons to find out their needs and goals
  - Survey the needs of businesses, one on one
  - Talk to businesses to find out their concerns. Ask for their help.
  - Continue visits to businesses
- Develop a quarterly businessperson's breakfast that would be a forum to discuss business trends, problems and solutions.

- Provide information to help deal with State regulations
- Advise local businesses on how to achieve their needs and goals
- Inform businesses of useful programs thru forums, seminars, email bulletins
- Provide seminars on vital issues
  - Develop seminars on many subjects
  - Provide workshops / seminars
- Offer to spread numbers and compare
- Evaluate businesses for equipment needs (internet usage-finance purchase)
- Find affordable health care plans for business owners.
- Provide a resource / contact list (e.g. how to do a mailing)
- Provide loans to expand existing business, other than through added employees.
- Provide programs for Mom & pop businesses
- Provide tax incentives
- The Corporation should provide the means to promote the businesses in GLC and provide the information to potential businesses that are interested in relocating.
- Review the Expansion and Retention survey done a couple of years ago
- Be a resource of information regarding grants, loans, training, etc.
- Develop web site links relative to building space, employment needs, transportation, etc.

**Strategic Issue/Goal 2:      How do we develop alternative funding sources?**

- Discuss with State agencies what each has to offer (Commerce, SBA, USDA, WHEDA, ABA, WIDFI)
  - Monitor State and Federal programs and grants
  - Contact WBA, COC, Advocap, WEDA, SBA, Business Banks
- Work with banks to set up “working capital” sources; combining State, County and local bank funding.
- Meet with bank Presidents or Boards to discuss how Corporation can work cooperatively with banks.
- Provide matching loans between County and Cities, Townships, etc.
- Give local municipalities incentives
- Check into grant programs
  - Check for grant funds
  - Develop a list of possible public and private funding sources and eligibility requirements
- Ask other Econ. Dev. Corps what they are doing
- Provide matching grants/loans for façade or signs and not just new businesses, make use of Chambers to partner.
- Work with local financial institutions on our programs and theirs
- Work with surrounding counties for joint funding
- Establish a private investor’s program/link
- Set up a business foundation to raise capital
- Check into the variety of funding sources out there to keep abreast of programs should a project arise.
- Visit municipal meetings to encourage participation and cooperation
- Put sources of financial resources on the web

**Strategic Issue/Goal 3:      **How do we make the financial institutions a bigger part of our process?****

- Work together to put together funding packages or promotional packages
- Have periodic meetings with the banking group to communicate with them about the Corporations activities
  - Conduct seminars for all financial institutions to inform and listen
  - Specifically hold meetings to introduce bankers to the Corporation and RLF process
  - Invite the financial institutions to seminars to explain services and the loan process
  - Organize meetings with the financial institutions in the county to foster awareness and cooperation
- Provide informational sheets, promotional materials, about the Corporations activities
  - Keep all financial inst. Informed on quarterly/semi-annual basis by mail, internet or fax
  - Establish quarterly or semi annual meetings to help develop loan funds
  - Create a newsletter
- Meet with the bankers to communicate that the Corporation is not competition to them but rather a partner in funding opportunities
  - Make appointments with bank presidents to drop off information about the Corporation and how we can work together
  - Meet with and discuss with the financial institutions how to work cooperatively
- Let the banks know what the needs are
- Have the banks set up a fund for economic development
- Simplify application process through financial inst. Prior to EDC review
- The County should use it's deposits to influence participation by the financial institutions
- Physically visit lenders to explain services of the GLC Econ. Dev. Corp.
- Reduce the time it takes to OK loans and reduce the paperwork once the loan is Ok'd
- Get more revolving loan funds
- Meet with the bankers to discuss the outline of the Corporation's loan application and leave application forms at the banks
- Publicize our successes

**Strategic Issue/Goal 4:      **How can we determine what additional personnel are needed to accomplish the Corporation's goals / mission?****

- Ask State agencies involved in economic development (e.g. USDA, DOC, WHEDA)
- Put together a job description
- Evaluate volunteers and or staff annually
- Ask the business community their opinion annually
- Survey the recipients of GLC EDC services
- Review other counties (beyond area) progress or failures
- Ask other Counties that have an Economic Development Director about the services provided by the office
- Create a list of tasks to be accomplished
- Continue to explore the shared services of an economic development professional

- Develop a list of possible volunteer experts in our area and follow up on their possible contributions

**Strategic Issue/Goal 5:      **How do we promote Green Lake County for economic development?****

- Make better use of the Corporation’s web site
  - Link to businesses, municipalities
- Promote the “quality of life” facet of our County and area
- Work with the Chambers to promote the County
- Publicize our successes
  - Promote success stories through various news media
- Creating a positive attitude of the GLEDC demonstrating a working together attitude
- Hire a GL County Economic Development Director
- Run feature articles in area papers
  - Do press releases
- Hold Town Hall meetings in different areas of the county annually
- Use service clubs, Chamber of commerce’s other local organizations forums
- Make actions of the EDC public, publicize successful loan recipients
- Invite local municipalities to meetings, or got to their meeting to talk about ED
- Capitalize on visitors
- Work with existing businesses to grow and maintain labor force
- Look for businesses that complement existing businesses
- Develop a business incubator

**Strategic Issue/Goal 6:      **How do we market the services of the Corporation?****

- Make better use of the Corporation’s web site
  - Link to businesses, municipalities
- Conduct business visits
  - Make regular visits to businesses
- Include links to county business’s web sites
- When possible recruit post user’s of our services to make business contacts
- Make a newsletter, or brochure, use emails
- Advertise, radio, newspaper, and computer
  - Get more press coverage
  - Do press releases
  - Report success stories to the news media
  - Start a GLC EDC column in local newspapers
- Personal contacts with business
- Hold seminars along with local banks
- Use UW Extension
- Hold Town Hall meetings in different areas of the county annually
- Make use of testimonials
- Hire a professional
- Invest more time in promotions

**Strategic Issue/Goal 7a:      **How can we determine the type of partnerships the Corporation needs to help us accomplish our goals / mission?****

- Identify entities with similar needs and resources
- Develop a list of pros and cons relative to the benefits of regional cooperation versus single county
- Seek representation from key players at the business and municipal levels
- Set needs and goals
- Develop a job description for a ED Director
- Review/monitor outside area EDC operations
- Establish a temporary committee of 3 counties to work on a specific project (e.g. loan program)
- Have a brainstorming meeting where you invite leaders from Townships, Villages and Cities and members of the business community to discuss EDC goals and discuss partnering possibilities
- Give a program at the Towns Association meeting to determine how they may partner with the corporation
- Discuss with cities regarding their industrial parks and finances needed to develop them

**Strategic Issue/Goal 7b:      **What must be done to develop these partnerships?****

- Creating a reasonable game plan that is equal for all included
- Review/monitor outside area EDC operations
- Establish a temporary committee of 3 counties to work on a specific project (e.g. loan program)
- Develop lines of communication, (print, newsletter, seminars)
- Start meeting with businesses, towns, and city planning committee

**Strategic Issue/Goal 8:      **How do we create a single source provider of economic development information?****

- Develop a resource and information guide
- Involve local zoning and county officials in developing guidelines for permit processing
- Meet with county zoning committee to gain a better understanding of their goals and processes
- Work with the departments to make them more user friendly
- Hire an ED Director
  - Establish Director position
- Get the current ED players together to discuss how they can work together
- Develop a list of individuals a person can talk to in the different communities that will give them the information they need with only one stop when the business is looking to locate in a city.

**Strategic Issue/Goal 9:      **How can the Corporation assist the County Planner and County Board to standardize (adjust) zoning ordinances to enhance economic development?****

- Review zoning ordinances and make recommendations for modifications to benefit economic development

- Support zoning ordinances that preserve our “quality of life” and are good for economic development
- Work with the zoning committee to address standardization
- Point out general areas which are causing problems and brainstorm to see if there are ways to ease the individual burden being caused
- Make use of the ED Director
- Have EDC review current ordinances that affect ED
- Compare what more progressive counties have accomplished
- Review County planners position with ED position and consider consolidation with other counties
- Educate ourselves so we have a better understanding of zoning rationale.
- Make the County Planner and county Board aware of current problems
- Listen to complaints and make them more aware of them
- Determine if it is the Ordinances or the enforcement of the Ordinances

**Strategic Issue/Goal 10:      How can the Corporation address the distance issue from major markets / Interstate Highways and airports?**

- Study existing business’s concerns with distance to major markets
- Develop an advantage/disadvantage list for potential business (Education, “quality of life, small towns, may be a greater advantage to outweigh distance from markets)
- Seek business’s which are less dependent on market location
- Point out the strengths of the county and also the factor that major highways are only a short distance away
- Stress the wonderful living conditions in GLC
- Resolve to make the best of what we currently have
- Promote the availability of land and quality of life
- Highlight the assets of the county to counteract the distance factor
- Target businesses that do not depend on highways and airports

**Strategic Issue/Goal 11:      What can the Corporation do to address labor force issues?**

- Cooperation and collaboration with Job Service, Advocap, placement services
- Develop website links with businesses
- Market our location to attract high wage/high skill employers and employees
- Stress the great living conditions in GLC
  - Continue to promote “Quality of Life” issue for county
- Target industries that are not location dependent
- Maintain contact with area employment agencies
- Develop an incubator for pooled labor and infrastructure
- Encourage trade school satellites.
- Look into affordable health care
- Conduct a labor retention study
- Work for affordable, good housing

**Strategic Issue/Goal 12:      **What can the Corporation do to utilize the potential of second home residents?****

- Use second home residents to market our area as a good place to locate
- Visitors may be a source of volunteer expertise (mentors)
- Advertise for involvement in county projects such as mentoring projects for new business ventures
- Promote starting a business out of the second homes
- Utilize area organizations (e.g. GL Assn) to inform or guide us
- Develop and maintain a list of interested parties
- Direct correspondence highlighting EDC accomplishments and seeking input from second home residents on their interest
- Establish a mentoring program
- Promote expanding businesses here
- Develop an area where people can use the Internet, have access to a copier, an/or availability of clerical staff

**Step 6: Strategy Formulation**

The purpose of Step 6 is to create a set of strategies and detailed objectives to address the priority strategic issues identified in Step 5, so the Economic Development Corporation Board can strive to move forward.

The following text outlines the structure by which each of the priority strategic issues will be addressed by the Board. The information displays the identified specific strategies, detailed objectives, a timeline to implement each strategy, and the person or organization responsible for initiating action on each strategy.

**Green Lake County Economic Development Corporation  
Priority Strategic Issues/Goals for year 2004**

The Board selected the following issues/goals as the economic development areas that need the most attention in 2004. They were selected from the entire list of issues/goals in the preceding section. The Board took additional time to strategize actions for these priority issues/goals as listed in this section. However, as this strategic planning effort was not designed to develop a static document, it is understood that as situations change throughout the year, this plan may be altered and the Board may undertake other activities to address a more pressing need.

**Priority Issues/Goals for 2004**

**Strategic Issue/Goal: *What should the Corporation do to assist / benefit existing businesses?***

***Strategy A***

**Hold Community Informational meetings**

The Corporation members believe it is their responsibility to be the conduit of economic development information to businesses, local government and the general public in Green Lake County. The Corporation will sponsor four meetings annually that will be highlighted by a keynote speaker, offer information about current economic development resources, and provide attendees an opportunity to network.

***Objective***

*Provide information to the public regarding economic development issues in Green Lake County*

***Objective Details***

- Meetings held on a quarterly basis
- Each community in county holds one meeting per year
- Meeting will have topic presented, include open discussion / networking time
- Topics determined by Board at annual planning meeting
- Board members expected to attend meetings, if schedules permit
- Opportunity for Board to discuss Corporation activities/resources
- Board members are expected to promote the meeting within county

***Who is Responsible?***

- Board members determine meeting agendas including presentation topics
- County Clerk responsible for logistics
- Board members chair meetings
- County Clerk and UWEX Resource Educator responsible for securing presenter

***Timeline for Completion***

Meetings to be held on a quarterly basis, starting in January 2004

- Meetings to be held on the last Thursday of the month, (May meeting must be before the last Monday of the month to comply with Corporation bylaws)

January – January 29<sup>th</sup> 6:00 p.m., in Princeton

May – May 27<sup>th</sup> 6:00 p.m., in Markesan

July – July 29<sup>th</sup> 6:00 p.m., in Berlin

October – 28<sup>th</sup> 6:00 p.m., in Green Lake

## ***Strategy B***

### ***Conduct businessperson's meetings***

The Corporation wants to sponsor a set of meetings specifically for businesses. These meetings are a chance to discuss relevant topics, and provide a networking opportunity for community businesspersons.

## ***Objectives***

*Have informal businessperson's breakfast/lunch gatherings*

### ***Objective Details***

- Meetings held on a quarterly basis
- Corporation picks up cost of refreshments, determined by Corporation
- Meetings are held in all communities of county
- Meetings designed to network, share resources, spur communication, less formal presentation provided
- Topics for meetings determined by Board at annual planning meeting
- Board members should attend if schedules permit
- Board members are expected to promote the activity within county

### ***Who is Responsible?***

- Board members determine meeting agendas including presentation topics
- County Clerk responsible for logistics
- UWEX Resource Educator will chair will lead meeting
- UWEX Resource Educator responsible for securing presenter

### ***Timeline for Completion***

Meetings will be held on a quarterly basis, one in each community in the county.

- Meetings to be held one of the first two weeks of the month.

December – In Princeton

March – In Markesan

May – In Berlin

September – In Green Lake

## ***Strategy C***

### ***Make regular business visits***

Business retention is at the heart of the county's economic development effort. Board members will talk face to face with area businesses sharing information and working to help these businesses in any way they can.

## ***Objectives***

*Improve the communication between county businesses and the Corporation*

### ***Objective Details***

- Each Board member provides a list of businesses to visit
- Priority of visits:

- Current RLF participants
  - Businesses with 10 or more employees
  - Growth Businesses (determined by Board)
  - Other businesses from Board members lists
- Make use of each communities Chamber of Commerce to promote the visits
  - Four Board members volunteered to be the liaison for the communities in 2004
    - Princeton - Dan Priske
    - Berlin – Roger Field
    - Green Lake – Terry Williamson
    - Markesan – Ken Werth
  - Visitation teams should include two Corporation members and the UWEX resource educator (when available). If schedules do not permit two Corporation members to attend one member is sufficient for the visit.
  - Community Liaison Board members will make the visitation appointments
  - A business information form should be completed at the conclusion of each visit
  - Visits should be used to share Corporation, State and local resource information

***Who is Responsible?***

- All Board members provide business lists annually
- UWEX Resource Educator works with Chambers of Commerce on promotion
- Community Liaison Board members will make the visitation appointments
- It is suggested that all Board members participate in the visits
- Board members will share appropriate\* visitation information with the whole Board at the next monthly meeting (\*Some confidential information may only be discussed in closed session)
- County Clerk will provide list of current RLF participants
- UWEX Resource Educator will provide list of employers in County

***Timeline for Completion***

- Board members will determine the master list of businesses they wish to be visited in the next year
- County Clerk will provide RLF participants list annually at December meeting
- UWEX Resource Educator will provide list of employers annually at December meeting
- Visits will be conducted starting in January 2004 and continue monthly throughout the year
- Reports on visits will be expected at the following months scheduled meeting
- All RLF participants will be visited annually
- Largest employers (more than 10 employees) should be visited annually
- The business visitation schedule will be determined the month before the visits on a monthly basis (e.g. Jan. visits are determined in Dec.)

**Strategic Issue/Goal: *How do we promote Green Lake County for economic development?***

***Strategy A***

**Improve the Economic Development Corporation's web site**

The Corporation wants to make sure their promotional materials are current and useful to existing and potential businesses.

***Objectives***

*Update and keep the Economic Development Corporation's web site current*

***Objective Details***

- Update the web site to make sure everything is current
- Add information to the site (As determined by Board)
- Install links to make the web site more useful

***Who is Responsible?***

- UWEX Resource Educator is responsible for updating site
- UWEX Resource Educator is responsible to make sure the site is kept current
- Board members are responsible for determining the content of the site
- The UWEX Resource Educator is responsible to make reports to the Board concerning the web site at the regularly scheduled monthly meetings

***Timeline for Completion***

- The current site information should be updated by the May 2004 Board meeting
- All information added must be current
- Board can bring new information to County Clerk or UWEX office at any time

***Strategy B***

**Get an economic development professional working in the county**

Hiring an Economic Development professional is a goal for the Corporation. Board members realize the limitations of a volunteer board and the benefits of having someone full time working to improve business conditions in the county.

***Objectives***

*Hire a Green Lake County Economic Development Director*

***Objective Details***

- Pursue options to hire a county ED Director
- Investigate partnering with another existing ED Corporation
- Investigate sharing a position with other Counties

***Who is Responsible?***

- Board members

### ***Timeline for Completion***

- Decision should be made by July 2004 to be considered in the 2005 County Budget

### **Strategic Issue/Goal: How do we market the services of the Corporation?**

#### ***Strategy A***

##### **Promote the services of the Corporation / Economic Development through print materials**

The Corporation wants to make sure their promotional materials are current and useful to existing and potential businesses.

#### **Objectives**

*Develop a packet of materials for distribution*

##### ***Objective Details***

- Make a brochure highlighting what's available in the County
- Develop a 1 (one) page fact sheet of contact information (include State, local)
- Develop a folder of materials including, profiles, sites, financing, contacts, and demographics.

##### ***Who is Responsible?***

- UWEX office will create the brochure
- UWEX office and County Clerk will develop other print materials

##### ***Timeline for Completion***

- Fact Sheet by quarterly meeting in January 2004
- Completed Package by July 2004

#### ***Strategy B***

##### **Make presentations**

The Corporation wants to talk about business development strategies to as many organizations as possible. Through these presentations they hope to develop strong relationships and improve communications.

#### **Objectives**

*Make better use of the area's service clubs and civic organizations to promote the Corporations mission*

##### ***Objective Details***

- Make informational presentations to the Boards of area Chamber of Commerce
- Make informational presentations to civic organizations (e.g. Rotary, Jaycees)
- Make informational presentations to schools (K-12 and Tech)

##### ***Who is Responsible?***

- Board members are expected to take turns making presentations
- The County Clerk and UWEX Resource Educator will provide issues to discuss and will create the actual presentations
- The Board will have oversight in the final presentation

- The County Clerk shall make arrangements with the organizations to get the presentations on the agendas

#### ***Timeline for Completion***

- Each Board member will complete 2 (two) presentations annually. When all clubs, schools or organizations that wish a presentation are completed, these groups' presentations will be conducted on a bi-annual schedule.

#### **Plan Management**

The Green Lake County Economic Development Corporation's Strategic Planning initiative was completed with the development of the strategies to address their priority strategic issues/goals for 2004. The Corporation will re-visit this plan annually to evaluate their actions of the past year and discuss their priorities for the coming year. Steps 7 through 10 in this strategic planning process are plan management steps.

#### **Step 7: Review and Adopt the Strategic Plan**

As stated previously in this report the Economic Development Corporation will review this report at their December 2003 meeting. The official decision to adopt and proceed with the strategic plan will be part of their January 2004 monthly meeting. Adoption of the plan legitimizes the planning work done by the Corporation, and clears the way to implement the plan.

#### **Step 8: Develop an Effective Organizational Vision for the Future**

Step 8 provides a platform for developing a vision for the future of the economic development effort in Green Lake County. In effect, the vision is what the business community will look like when the strategic plan has been successfully implemented. It is the point in the future where all strategies and actions have been accomplished. Such a vision can be extremely important for educational purposes and for allowing action to be taken. It was understood that this planning effort was being completed by a volunteer board without the aid of an economic development professional in the county. While it is possible to achieve the vision of the Economic Development Corporation it is understood that hiring an economic development professional is very important to the success of the vision. The Corporation will re-address their vision at the same time that they assess their 2004 achievements in December of 2004 and again in December of 2007.

#### **Step 9: Develop an Effective Implementation Process**

Step 9 provides the Corporation the opportunity to make sure that specific actions developed through the strategic planning process is put into place in an effective manner. This is where the ideas of the plan become actions. To many the implementation is the most important step in a strategic planning process. As this planning effort was completed by a group of volunteers the implementation of these strategies can be difficult. The Board spent considerable time deliberating the reality of the plans strategies and if the Board was capable of implementation.

The Board only proposed strategies that have a good chance of implementation with existing resources.

### **Step 10: Reassessing Strategies and the Strategic Planning Process**

The final step in this strategic planning approach is to review implemented strategies and the strategic planning process. This step is the monitoring and evaluation of the effectiveness of the strategies. This is a great place to initiate a scheduled review process which will review the progress of achieving the agreed upon action plan. Develop a checklist of actions and make note of progress made toward completing each action. Have the strategies been completed, has work started on any of the actions? If not, why? Can any of the strategies be revised or replaced? Do any of the strategies need to be terminated? These questions and others like them need to be asked to keep the plan vital and to properly evaluate the effectiveness of the strategic plan.

Also, this step can be used to help assess when a new strategic planning effort is necessary. By assessing the strategic plan's effectiveness on a continual basis, the Board can determine when new strategic issues/goals arise or when current strategies are no longer effective. Or, following successful implementation of the plan, it may be time to begin a new strategic planning effort. The Board will take up the review of this plan and future planning activities annually, starting in at their December 2004 monthly meeting.

# Appendix

Program Evaluation and Results

Planning Schematic

## Program Evaluation and Results

**GREEN LAKE COUNTY ECONOMIC DEVELOPMENT CORPORATION**  
*Strategic Planning Effort Evaluation Results*  
(10/31/03)

What have you learned about Economic Development Corporation through this process?

- *Strategic Planning Process has helped to develop several economic programs for the future*
- *A volunteer organization, diverse and willing to help, but limited in funds, direction and exposure*
- *We need to give it more work than we have given it in the past*
- *Very capable entity*
- *How to plan our procedures and to prioritize objectives*
- *Communication and cooperation are critical for success*
- *It has to be a consolidated effort, working together. Sometimes slow process to achieve the goal of the corporation.*

What specific part of the planning effort helped you to come to this conclusion?

- *The exercise showing the SWOT of the corporation and the varied responses given by Board Members*
- *External and internal assessment*
- *Just the strategic planning process in general*
- *Formulation of economic development, lead person opportunity*
- *Action plan*
- *SWOT analysis*
- *Many ideas from group attending sessions*

How will this knowledge influence your future decision for the Corporation?

- *The planning sessions helped to understand the pros and cons that exist in Green Lake County*
- *Not sure*
- *Be more pro-active*
- *Be more cognizant of other strategies*
- *It will keep me focused on what can be done and to not waste time or effort on futile processes*
- *Decisions will be made with cooperation of partner and stakeholders and feedback from our communications with them*
- *Will be more conscience of efforts taken and needs within the County*

Please describe a strength of or opportunity for Economic Development Corporation that you weren't aware of before conducting this planning effort.

- *The familiarity of the businesses by Board Members and the roll of the second-home residents within the County*
- *Inter-department cooperation within the County*
- *The commitment of the Board Members*

- *Development of future planning*
- *Ability to act fast*
- *Inter-department cooperation – wasn't sure it existed*
- *From past history of the Green Lake County Economic Development Corporation little has been done to develop good economic growth which is so badly needed*

Please describe a weakness of or threat to Economic Development Corporation that you weren't aware of before conducting this planning effort.

- *The amount of negative feeling and not wanting change to improve things*
- *Limited exposure of programs at banks - thought all were involved*
- *Lack of basic business base*
- *Apathy*
- *Limited exposure of programs at banks*
- *Too restrictive zoning*

How will your organization change as a result of this planning effort?

- *We will be positive and do things rationally – not just attend meetings which often resolve nothing*
- *Hiring a professional will provide direction and measure of results*
- *We'll work harder as a team*
- *Improve*
- *It appears we will become more active within the communities*
- *Organization now has a plan with timeliness and responsibilities*
- *By becoming more aware and making a conscience effort when working on economic development*

Which steps were most useful to you (please circle one) and state why?

Stakeholder Review / Mandate Analysis / Mission Statement Development / SWOT /

Strategic Issue Identification / Strategy Development / Plan Management

- *Strategy Development – Strategy Development and Plan Management are closely related and should develop positive good results*
- *Stakeholder Review – It is the basic analysis that leads to development and planning*
- *Plan Management – It gives the focus for the future relating to getting things accomplished*
- *Plan Management – Successful execution of economic development goals*
- *Strategy Development – The process lays out what should be done*
- *Strategy Development – We needed direction and a plan of implementation*

- *SWOT – It covered many issues/areas all connected with economic development*

How can I teach this planning information to you differently so I can be more effective for future groups?

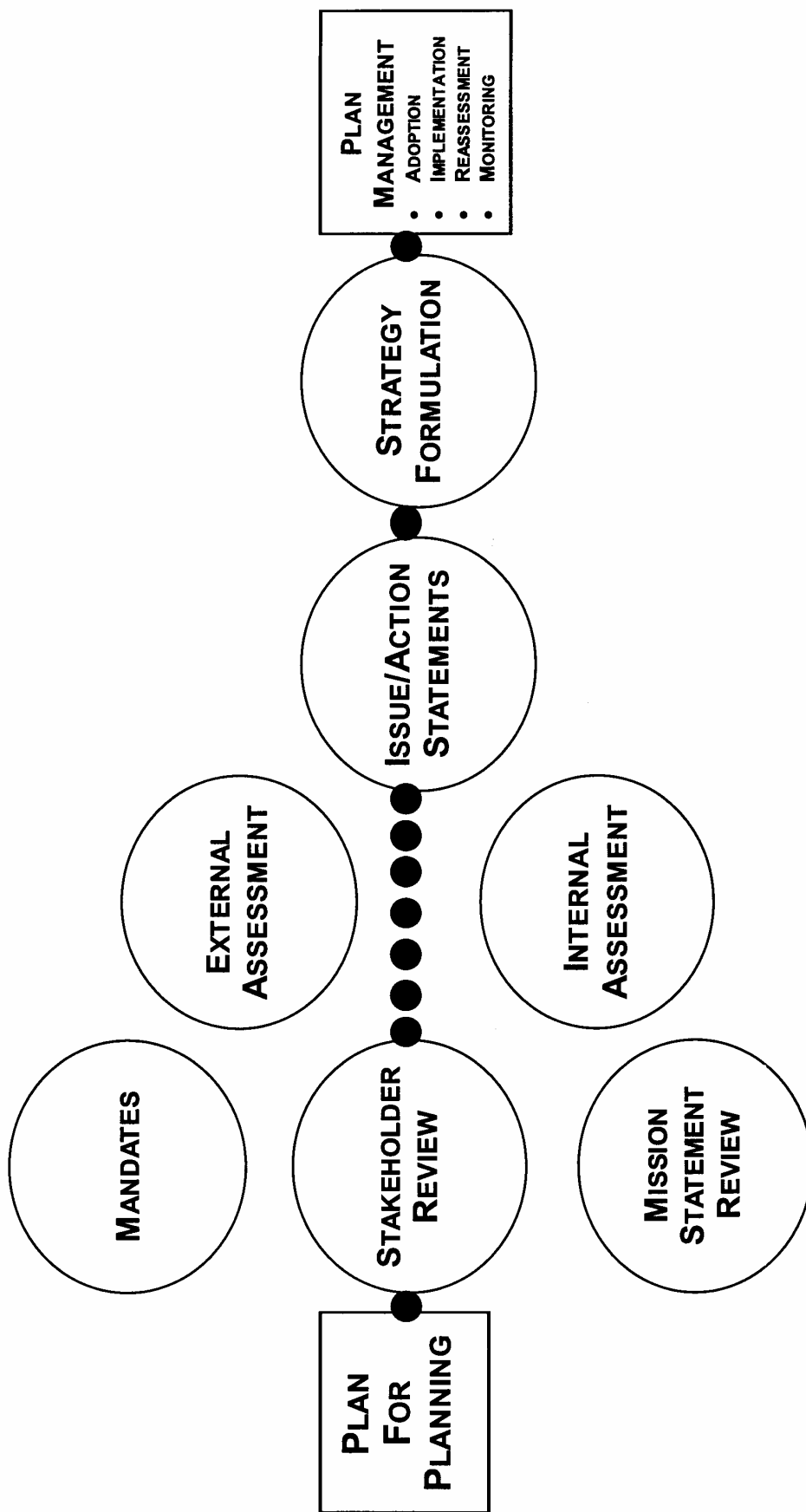
- *All in all Jeff you did an excellent job and have been very helpful – now let's hope we get the needed economic development program done with success*
- *Make sure the group understands the process and time from the start – I think we caused you to shortcut some things – it was not made a priority by some*
- *I think consolidation of information would help and more visual presentations or related information from other organizations like ours*
- *Narrow downward number of decisions to be discussed/approved/disapproved at each session*
- *I think the process went well*
- *I felt you did a great job given the fact it has to be spread out over a long period of time – it would help to have a couple of longer sessions for continuity*
- *Truthfully it was done the very best that could be done. As adults, we are very lax to "homework," however, the work sessions were very well structured and informative, taught very well and well done.*

Other Comments

- *The process made the group think and discuss*
- *Due to my lack of attendance, I fell out of the loop and cannot clearly respond to this evaluation*
- *Good work – it wasn't easy, but you made us think*
- *Jeff – thanks for the time and effort in leading us through this process*

## Planning Schematic

# OVERVIEW OF THE STRATEGIC PLANNING PROCESS



- “Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide an organization and what it does.”
- “It’s a powerful tool that helps organizations figure out what’s really important and what to do about it.”