

SUMMARY OF PROFESSIONAL CONTRIBUTIONS AND SCHOLARSHIP

INTRODUCTION

I began my UW-Extension career as Green Lake County's Community Resource Development Educator in 2001. I came to Extension with formal training in economics, geography, and business. I have had experience as a private business owner, as an analyst in one of the largest accounting firms in the country, as a planning consultant; and at one time, I even owned a dairy farm. My early programming in Green Lake County concentrated on economic development issues working with individuals and local economic development corporations. As needs in the county changed, so did my programming. I concentrated my efforts on the strategic needs of organizations for planning, leadership development, and conflict management. Although, I did not have background in these areas, I made use of several UW-Extension professional development opportunities to help bolster my expertise.

In this summary, I will describe two major programming areas: community and economic development, and organizational development. I will conclude this paper by reflecting on my efforts in UW-Extension to date and by laying out the implications for my programming efforts in the future.

PROGRAM AREA I

COMMUNITY AND ECONOMIC DEVELOPMENT

Demonstrated impacts of my programming in Community and Economic Development include:

- The development of a strategic plan for the Green Lake County Economic Development Corporation.
- The implementation of community meetings by the Green Lake County Economic Development Corporation.
- The implementation of a business visitation program by the Green Lake County Economic Development Corporation.
- The introduction of special economic development initiatives by Board members from the Green Lake County Economic Development Corporation members.
- The action by several business owners to start or expand businesses.
- The completion of a business retention and expansion program in Berlin.
- The development of the Tri-County Regional Economic Development Corporation.
- The hiring of an Economic Development professional for the Tri-County Regional Economic Development Corporation.
- The growth of jobs due to a significant increase in the use of the County Revolving Loan program.

Situation

During the interview process, the Green Lake County Ag & Extension Committee members emphasized their desire that the Community Resource Development Educator provide education and assistance in economic development. They wanted to encourage business retention and expansion, although they realized that there were limited county resources dedicated to economic development.

When I started in Green Lake County in December of 2001, three of the four communities and the County had some form of economic development organization. The most developed economic development organization was part of the City of Berlin. However, early in 2002, that organization eliminated their economic development position. The Chambers of Commerce in the county put some effort into recruiting businesses, but their resources were limited. These

organizations knew they wanted to do more, but they were not sure how or what they could do. For the most part, Green Lake County had many well-intentioned volunteer Board members. However, they did not have training on how to help businesses locate, grow, and thrive. Additionally, these individuals had to work with limited resources and time. With the aforementioned limitations, the economic situation in the county had stagnated for several years.

Programming

My plan was to teach the existing volunteer-based economic development organizations how to more effectively assist existing businesses and support their expansion. However, I first needed to teach these organizations how to develop their organizational capacity. Only then, would they understand how to focus their actions in a meaningful way.

I started by talking with the formal and informal stakeholders from the County and each individual community about their thoughts and concerns on economic development. As I learned the needs of the stakeholders, I developed a clearer picture of the county; I was able to focus my efforts on specific initiatives. I will describe these initiatives as explained below.

Organizational Development - Green Lake County Economic Development Corporation

The first essential phase in my economic development programming was planning; I began with the Green Lake County Economic Development Corporation Board. This organization is responsible for the economic welfare of the entire county, while other local economic development organizations have more narrowly defined areas of responsibility. My initial programming included facilitating the development of a strategic plan.

The group had an existing, outdated plan that provided a viable starting point. I used the John Bryson strategic planning process for this effort. While facilitating, my normal practice has been to teach the participants about the strategic planning process. This Board, however, was not interested in learning the process, and they challenged me to refine my teaching techniques. I found I needed to change my facilitation approach by condensing the theory and limiting my examples. I was able to adapt my materials to keep the Board engaged in the strategic planning process. Over the six months that I facilitated their strategic planning process, I was careful to guide their discussions so they concentrated on tried and true economic development strategies. For example, I made sure they understood the value of retention and expansion strategies. They officially adopted the plan in January of 2004. The completed strategic plan is **Exhibit A**. When the Board members were queried about the planning process Williamson wrote, “*Good work – it wasn’t easy, but you made us think*”; when asked about ways to teach the process differently, Newbauer wrote “*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.*” The evaluation results are **Exhibit B**. The 2003 Central District Program Success Stories highlighted their planning effort (see **Exhibit C**.)

By holding community informational meetings, completing business visitations, and making presentations to civic groups, the Board addressed their desire to approach economic development proactively. One year after implementing their planning goals, the community informational meetings proved to be quite effective at introducing citizens to current economic development resources, and provided attendees with a unique opportunity to network. There were meetings held in Princeton, Berlin, and Markesan in 2004. An identifiable impact of these meetings was the increased interest in the county’s Revolving Loan Fund. In 2003, there were two inquiries for the program and two completed applications. In 2004, the meetings drew out seventeen inquiries resulting in eight completed applications. These new loans spurred new economic activity in the county by creating twenty-three new jobs and retaining fourteen jobs.

The Board was aware of the importance of business visitations. However, their business visitations lacked structure and usefulness. They did not record the information they learned, nor did they keep track of whom they met. During the strategic planning sessions, I taught them which information would be most useful and I helped them develop a business visitation questionnaire to standardize their approach. The Business Visitation Questionnaire form is **Exhibit D**.

The Board's new strategic approach to business visitations provided an opportunity for the Board members to learn about the business. During the strategic planning that I facilitated, the Board members learned about state and local resources, sources of financing and tools to address business concerns. By the time the strategic plan was complete, the Board members had become more knowledgeable about economic development. The business visitation program permitted them the chance to share their newly acquired knowledge on economic development, which has made the Corporation more capable of addressing their mission.

In an evaluation, the Board was asked how their organization would change as a result of this planning effort. One member stated, "*It appears we will become more active within the communities*" and another member commented, "*We'll work harder as a team.*" One year later the Board evaluated their efforts and four out of six of the Board felt the community informational meetings were very effective, while all six felt their business visits were effective or very effective. A summary of the evaluation is included as **Exhibit E**.

There were two unique outcomes resulting from the strategic planning. One Board member took the initiative to buy and print plaques for the businesses that they visited. He said the business visits should represent more than the gathering and sharing of information. The visits are a great opportunity to say "thank you." He also felt the plaques represent a positive promotional reminder of the Board's programs. A second Board member said he recognized the importance of the community meetings and he decided to sponsor a meeting designed to highlight the importance of the Green Lake County Economic Development Corporation's work. More than 50 business owners and locally elected officials attended the special breakfast, community meeting. These two initiatives resulted from the momentum that began with the strategic planning effort.

Organizational Development - Tri-County Regional Economic Development Corporation

Green Lake, Waushara, and Marquette Counties were all in the same economic situation. Their economies had stagnated. All had limited financial resources to hire professional help to address their economic condition. The Economic Development Corporation Boards from the three counties were open to the idea of a collaborative effort and they looked to UW-Extension for leadership. As a team, Community Resource Development Educators Patrick Nehring from Waushara, Patty Watson from Marquette County and I taught representatives from the three Boards what they needed to do to form and operate as an effective organization. We co-facilitated a strategic plan process and development of a position description document for the nascent organization. I facilitated the creation of their mission statement, identification of the potential organizational impacts, and the development of the position description. **Exhibit F** highlights class materials that I used to facilitate the mission statement exercise. This multi-year project resulted in the establishment of the Tri-County Regional Economic Development Corporation see **Exhibit G**. When asked what they learned from going through the process one participant commented, "*The process was laborious because of the many diversified ideas. – However, a grass roots effort requires that ideas be discussed for their value and to ensure ownership, which I believe maintains integrity*". The Board's evaluation is included as **Exhibit**

H. This Corporation secured funding from the three counties and the State of Wisconsin and hired an Executive Director in September of 2005. The newspaper article **Exhibit I**, reports the hiring of the Executive Director. The effort of developing the Tri-County Regional Economic Development Corporation was recognized by the Wisconsin Extension Environmental and Community Development Association with a Team Award in 2005, see **Exhibit J**.

Business Development

My programming with start-up and existing businesses offered me the opportunity to teach one-on-one. In Green Lake County, existing businesses came to me looking for information regarding finances or marketing, and often they make use of my expertise to review their business ideas. For example, a cement contractor was interested in marketing a decorative concrete finish by completing pro bono work in city parks. During our analysis of the financial feasibility, he discovered the costs were much greater than he anticipated which changed his mind about providing the pro bono work. It is worth noting that programming with entrepreneurs can often result in them making decisions not to do something and many times that is the right decision.

My experience working with entrepreneurs in Green Lake County showed that only approximately one out of every ten pursued their idea beyond their initial inquiry into starting a business. The results of my work with the persons who continued counseling beyond the initial stages shows that more than half have gone into business and this group has created twelve new jobs. **Exhibit K** lists the entrepreneurs with whom I have worked on business planning beyond their initial business feasibility inquiry. Two cases are included as representative of my one-on-one teaching.

The first case is about a woman who wanted to start a coffee shop/café. Initially, this individual wanted to know if her idea was feasible, and once established she could estimate her sales and cost of operation. I began by teaching her how to conduct a market study. By completing the market study she better understood where the majority of her potential customers resided, traditionally referred to as the business trade area. She was able to determine from her analysis that there was enough potential to support her business. I then taught her how to calculate sales from the trade area demographics. This analysis helped her learn that the market could support a coffee/café establishment but she determined the revenue that the business would generate was not great enough to support her lifestyle. She decided that not going into business was the correct decision. In our first meeting she told me, *“I know how to get my costs but I can’t figure out how much money I could make.”* In our last meeting she said, *“I was pretty sure I had a good idea, but I was scared of the money, after working with you I know a lot more now.”*

The second case involves an experienced contractor who was not very knowledgeable about marketing. I explained the usefulness of a market plan and taught him how to develop his own marketing plan. He used this information to develop a brochure, web site and a catalogue that he uses today in marketing his business. This individual was struggling with a downturn in his profession. The market had been strong enough in the past so he did not have to concern himself with marketing. Heiko Krueger from European Log Homes told me *“your help and resources allowed me to put together a much higher quality product than I could have done on my own.”*

Economic Development

The City of Berlin provided me with the opportunity to offer another kind of economic development programming. Economic conditions in the city led to elimination of administrative positions. The result was Berlin no longer had anyone in the City government who could address economic development concerns. I taught an ad hoc group of government and business leaders about economic development strategies in order to prepare them to address the city’s economic

development issues. They learned about economic development strategies for retaining current businesses and strategies to attract new businesses. I facilitated an analysis of their current state of preparedness for economic development activity and developed a set of organizational goals. The immediate result of my initial work with the Berlin Economic Development Committee was the completion of a community-wide business retention and expansion survey. The Berlin Economic Development Committee prioritized goals and developed strategies based on the survey information using group processes that I had taught and facilitated. (The Business Retention and Expansion survey goals and action steps are **Exhibit L**.) The survey results indicated that poor communication was an issue with business owners and they believed the City's identity had changed. In response to this information, members of the Committee created a Community Newsletter, (see **Exhibit M**), to improve lines of communication, while others from the Committee worked to create a new city slogan. The Berlin Journal wrote an article about their effort, (see **Exhibit N**.)

PROGRAM AREA II

ORGANIZATIONAL DEVELOPMENT

A second major programming effort in this paper involves my work in Leadership Development and Conflict Management. The outcomes of my work in these two disciplines include:

- The development of the Tri County Leadership Initiative community leadership program.
- Fifty-six County workers learned conflict management techniques.
- UW-Extension colleagues learned more effective ways to deal with difficult situations.
- Green Lake County Supervisors became aware of interest-based problem solving.
- Local government officials and County organizations learned a better way to work through complicated issues.

Leadership Development Situation

The need for an adult leadership development program has existed for several years in Green Lake County; leadership training ranked at or near the top on "needs surveys" for the past three years. While the need existed, I believed that Green Lake County did not have an adequate population to sustain a long-term quality program. I initiated discussions with UW-Extension personnel from Waushara and Marquette Counties and learned that their counties also were in need of leadership development training, but they also had sustainability concerns. It became apparent to me there was a need for a multi-county effort. I facilitated meetings with Extension and non-Extension individuals discussing our options for starting a program and this initial planning group decided to start the Tri-County Leadership Initiative adult leadership program. I volunteered to be the program administrator and run the program through the Green Lake County Extension office. I formed a steering committee of laypersons and Extension educators and organized them into sub-committees. This organizational structure is included as **Exhibit O**. My role as administrator involved facilitating steering committee meetings through policy development, facilitating small groups with the development of curriculum, creation of promotional materials, writing learner objectives, and program evaluations.

The first monthly Tri-County Leadership class was in September of 2004. The first class graduated twenty-one students in May of 2005. The second class began in September of 2005 with fourteen students. In addition to providing program administration, I also taught leadership skills to the classes such as facilitation, conflict management, strategic planning, and leadership responsibilities. An example of my facilitation presentation is included as **Exhibit P**. Seventy percent of the participants rated my facilitation class as being effective or very effective, ninety-two percent rating my strategic planning class as being effective or very effective, while eighty-six percent rated my leader responsibility class as effective or very effective. Remarks on

evaluations from some of the daylong sessions were “*As usual, intense, fast-moving – informative to say the least,*” “*Very “educational,*” “*Eye-opening,*” “*Informative – Encouraging,*” “*Relaxing, Rewarding – Excellent – Valuable.*”

A one-year evaluation of the 2004-2005 class participants revealed that several have taken on new leadership roles and responsibilities.

- Two successfully ran for office in local government.
- One is leading a group developing activities to bring awareness to 2006 National Nutrition Month ®.
- Three made presentations to the 2005-2006 TCLI class.
- One became a Board member on a non-profit corporation.
- One has become a County representative for the Central District Resource Mgmt. Team.
- One has begun volunteering at a Job Service.
- One is running for Sheriff in 2006.

I shared my experience of starting the Tri-County Leadership Initiative with Extension personnel in a summary guide for starting a multi-county adult leadership program entitled, *Tri-County Leadership Initiative: A Multi-County Leadership Development Program*. This document is included as **Exhibit Q**. I distributed this guide to all Extension personnel through email solicitation and provided it to the Community Based Leadership Team as a resource for the web. The professional Cooperative Extension fraternity, Epsilon Sigma Phi, recognized the collaborative efforts starting the Tri-County Leadership Initiative and the Tri County Regional Economic Development Corporation with the 2006 Epsilon Sigma Phi Team Award. The Award is included as **Exhibit R**.

Conflict Management Situation

Local governments struggle with their decisions, non-profits battle interpersonal conflict, and businesses suffer declining revenues if they do not respond appropriately to their customers’ complaints. The UW Extension Conflict Management Design Team recommended in their October 2001 report that UW-Faculty and staff “have a basic understanding and competencies in conflict management.”

As an Extension Educator, I am well suited to take a lead in conflict management education. I am a neutral, I have strong facilitation skills, and I am process-orientated. Therefore, it was natural for local organizations to look to me for help when their disputes escalated into full-blown conflicts. My educational effort in conflict management has included workshops with my local county departments and extension faculty. I completed facilitated negotiations for county organizations and local governments, and I conducted an interest-based facilitation for the Green Lake County Board of Supervisors long-range building plan. I provided several workshops on conflict skills by request of the Green Lake County Clerk to address concerns with County employees. I have been able to modify my conflict styles materials to use it in workshops with three different community based adult leadership programs and to Extension Educators in train-the-trainer classes. As examples of my work, I have included my conflict skills workshop presentation materials as **Exhibit S** and evaluations of the County workshops in **Exhibit T**.

Programming - Workshops

The employees in the county who attended the workshops stated that the conflict styles material was new to 47 of 56 participants. Of this group, eighty-four percent felt they would be able to use the information right away at work or will fit it in soon. Some of the responses to how will they use the information included “*to be aware of my own conflict tendencies and those of my co-workers,*” another participant wrote, “*just to be more aware of my behavior and what works and*

what doesn't and why so I can consciously change behavior." The District Attorney for the County came to me the next day to thank me for the workshop; he said, *"I have already seen a change in one of my employees, its great."* At the suggestion of Marge Bostelmann, the Green Lake County Clerk, I am continuing my conflict management education with the county by coaching difficult situation role-plays at Department Head meetings. I am using this opportunity to challenge the Department Heads to change their traditional attack-avoid paradigm to one of collaboration.

Conflict management education can include trainings, such as the conflict styles workshops I presented to Green Lake County employees. Conflict management education can also include the introduction of conflict management group processes. What follows is an example of an interest-based facilitation that I completed with the Green Lake County Board of Supervisors.

Green Lake County Supervisors Building Negotiation

Green Lake County has delayed capital improvement projects because the Board of Supervisors cannot agree where to build. They had authorized professional consultants to provide information on space needs and potential building configurations, but the Board still could not agree on a plan. In reality, the needs of the county are constantly changing, and new concerns have appeared over the last couple of years that have complicated the Board's decisions even further. The Board's indecision has caused tension among members, and the citizens of the county. The Board members found themselves focusing almost exclusively on their individual positions, which left virtually no room for discussion. This complicated situation was not positive or conducive to good decision-making.

I designed an interest-based, problem-solving process, where in the Supervisors discussed their wants, needs, and concerns. This process helped them understand their own interests and more importantly, they learned and came to understand their fellow Board members' interests and concerns. I conducted background research to familiarize myself with the issues, and I conducted interviews of all of the Supervisors to understand their wants, needs, and concerns. The interview portion of the process is where the Supervisors talk about their interests. I also used this part of the process to help the Supervisors define the problem, and suggest solutions. At the same time, I taught the Supervisors how to question their colleagues so they can have the same interest based discussion at the Board level. I presented a report summarizing my information to the Property and Insurance Committee, and followed up with a presentation to the entire Green Lake County Board. The report is included as **Exhibit U**.

Two weeks after my presentation, the Board of Supervisors passed a resolution to move forward with planning for building a Justice Center. Random discussions with Board members about why they decided to go forward with the building project indicated that my process helped them to understand each other and the subsequent presentation cleared up misconceptions, while the discussions centered on the Supervisors interests were more constructive than in the past. Supervisor Brennan went on record saying, *"I really began to look at my preferred conclusion in a different light and was able to understand the bigger picture more clearly."* I am not implying that my effort introducing interest-based, problem-solving negotiation into the process was the only reason that the Board was able to move forward; it was, however, a significant change from the traditional way of decision making on the Board. Marge Bostelmann, Green Lake County Administrative Coordinator, said, *"your effort definitely affected some of the members, at least enough of them so they were able to pass the resolution, and we have been working on this for a long time, eight years to be specific."*

REFLECTION

So, what or who is different, better off, or changed because I have been the UW-Extension Resource Development Educator for five years in Green Lake County? To start, I think I have been transformed as an educator. I will also demonstrate that the County has been positively affected, and I believe UW-Extension has benefited as well.

Let me start with myself. I had not been trained as an educator, and my life experiences did not prepare me to assume an educator's role. It took me two or three years before I began to think like an educator. I presented material to people, but I was not really teaching them very much. I facilitated groups but they were not really learning. At most, I think I was helping make elaborate flip chart lists. I learned that I needed to back off from telling people, to teaching them through questioning, demonstration of concepts, and helping them make linkages to their experiences. Now I realize that there are many different ways to educate, but this is what works for me. I still have a long way to go to be a good educator, but now I *think* like an educator and that was truly a leap. My ability to teach has improved because of it. A second area of personal growth I attribute to my Extension experience is leadership. I have been Green Lake's Department Head for close to half of my time in the County. During that time, I have learned that leaders build relationships, praise good work, and are always responsible.

From the County's perspective, I am different from their last Resource Development Educator. My predecessor was a local icon. However, different is okay, because the County's needs changed and together we made positive impacts. New leaders are learning in the Tri County Leadership Initiative. Economic development needs are being addressed locally with empowered economic development committees and corporations, as well as regionally, through a collaborative effort with adjacent counties to hire a professional Economic Developer. Civic organizations learned the value of thinking strategically and the benefits of conflict management. The people have come to respect my efforts and I have gained an insight into the tremendous potential that exists in the citizens of Green Lake County.

If I were to leave today, can I honestly say I have improved UW-Extension's status in Green Lake County? I have to say, "Yes." I have broadened Green Lake County residents' understanding of UW-Extension's capabilities and services, and that has increased the value of UW-Extension to them, so yes, the organization is better off now than when I started.

As I think about the future, I know there will be changes. During my tenure with UW-Extension, the political climate has been one of downsizing and restructuring. With that in mind, I do not think it is enough for me to only complete excellent programming and expect to remain in my position. I need to be more politically savvy and, as Department Head, more fiscally aware, if I want my position and the office to survive. I believe, in the future, my programming in conflict management and strategic planning are going to be more in demand than ever before. Locally elected officials will look to me to teach them better ways to handle public disputes. Non-profit organizations and communities organizations will seek out my facilitation skills to complete strategic planning. I will work to teach public and private groups interest-based decision-making skills. I believe in a collaborative approach to teaching entrepreneurs. Therefore, I will develop a business-mentoring program and encourage inventor and entrepreneur clubs. My goal is to create an environment where entrepreneurs can grow and thrive. Ultimately, I want to change attitudes; I want people to embrace the idea that failure is not fatal.

I have heard that in difficult fiscal times it is not good to be a public servant. I cannot think of a better time to be an Extension Educator. When times are tough, people need and value education more than ever.