

ROCK COUNTY, WISCONSIN



**EDUCATION, VETERANS & AGING SERVICES COMMITTEE
TUESDAY, MAY 21, 2019 - 4:00 P.M.
CONFERENCE ROOM N-1 – FIFTH FLOOR
ROCK COUNTY COURTHOUSE-EAST**

Agenda

1. Call to Order
2. Approval of Agenda
3. Approval of Minutes – March 19, 2019
4. Citizen Participation, Communications, Announcements, Information
5. Transfers
6. Review of Payments
7. Updates and Possible Action
 - A. COA/ADRC Integration (grant application and committee member selection)
 - B. UW Whitewater at Rock County update – Kristin Fillhouer
8. Committee Requests and Motions
9. Adjournment

The County of Rock will provide reasonable accommodations to people with disabilities. Please contact us at 608-757-5510 or e-mail countyadmin@co.rock.wi.us at least 48 hours prior to a public meeting to discuss any accommodations that may be necessary.

Please contact Marilyn at (608)757-5510 if you are going to be late or if you will not be able to attend the meeting.



EDUCATION, VETERANS AND AGING SERVICES COMMITTEE
Minutes – March 19, 2019

Call to Order. Chair Richard called the meeting of the Education, Veterans and Aging Services Committee to order at 4:00 P.M. on Tuesday, March 19, 2019, in Conference Room, N-1, fifth floor, Courthouse East.

Committee Members Present: Supervisors Richard, Brien, Owens and Pleasant.

Committee Members Absent: Supervisor Gramke.

Staff Members Present: Josh Smith, County Administrator; Randy Terronez, Assistant to the County Administrator; Lachel Fowler, Interim Director of Council on Aging; John Solis, Veteran Service Officer.

Others Present: William Anderson, Jr., RSVP.

Approval of Agenda. Supervisor Owens moved approval of the agenda, second by Supervisor Pleasant. ADOPTED.

Approval of Minutes – January 15, 2019. Supervisor Pleasant moved approval of the minutes from January 15, 2019 as presented, second by Supervisor Brien. ADOPTED.

Citizen Participation, Communications, Announcements, Information. None.

Transfers. None.

Review of Payments. The committee accepted the report.

Updates and Possible Action.

Veterans Services Report. Mr. Solis reviewed the report with the committee. Mr. Solis said one update since he prepared the report is they have now received the WDVA CVSO Grant for 2019 in the amount of \$13,000. The committee asked Mr. Solis if he is looking for other sources of donations. He is trying to organize another patriotic concert soon.

Update on Possible Council on Aging/ADRC Integration. Mr. Smith said there was a joint meeting of the ADRC and COA Advisory Board yesterday. Mr. Smith provided a handout of information from the joint meeting. They had gathered information from La Crosse County on their integration process. Mr. Smith said there was good discussion and input at yesterday's meeting. There will be another joint meeting on April 1st where they hope to have more examples and information from state staff and GWAAR (Greater Wisconsin Agency on Aging Resources). Mr. Smith invited the committee to attend the joint meeting. Mr. Smith reminded the

committee that the goal of integration would be to simplify client services into a one stop shop. If integration occurs, the Human Services Board would oversee the new department.

Mr. Smith reminded the committee of the initial plan to have Ms. Fowler remain interim Council on Aging Director until an integration recommendation was made. GWAAR, one of Council on Aging's funding sources, has asked us to not keep Ms. Fowler in a dual role for a long time as it takes away from her primary duties. Mr. Smith said we may have to move forward with the Council on Aging Director recruitment. If integration is recommended, a resolution will come before the EVAS committee and then County Board unless the timing is right for it to be worked into the next budget. This will remain as a standing agenda item.

Committee Requests and Motions. None.

Adjournment. Supervisor Owens moved adjournment at 4:48 P.M., second by Supervisor Pleasant. ADOPTED.

Respectfully submitted,

Tracey VanZandt,
Human Resources Secretary

NOT OFFICIAL UNTIL APPROVED BY COMMITTEE.

**COMMITTEE REVIEW REPORT
WITH DESCRIPTION
FOR THE MONTH OF APRIL 2019**

Account Number	Account Name	PO#	Check Date	Vendor Name	Description	Inv/Enc Amt
30-3903-0000-62105	FOOD SERVICES					
		P1901204	04/11/2019	BEST EVENTS	1ST HALF JAN CONCRETE	2,684.45
30-3903-0000-62119	OTHER SERVICES					
		P1900879	04/25/2019	MANPOWER GROUP US INC	SITE MANAGERS W-E 04-07	3,553.17
30-3903-0000-64124	CONSUMABLE SUPPL					
		P1901204	04/11/2019	BEST EVENTS	CONCRETE JAN SUPPLIES	334.44
NUTRITION PROGRAM PROG TOTAL						6,572.06
30-3904-0000-62105	FOOD SERVICES					
		P1901204	04/11/2019	BEST EVENTS	1ST HALF JAN HDM	4,494.29
30-3904-0000-64124	CONSUMABLE SUPPL					
		P1901204	04/11/2019	BEST EVENTS	HDM SUPPLIES	284.99
30-3904-0000-64907	VOL RELATED EXP					
		P1901320	04/18/2019	CIMA COMPANIES INC,THE	VOLUNTEER ACCIDENT INSURANCE	195.50
DELIVERED MEALS PROG TOTAL						4,974.78
30-3905-0000-62100	CONTRACTED SERV					
		P1900879	04/25/2019	MANPOWER GROUP US INC	TRANSIT DRIVERS W/E 04-07	26,032.02
30-3905-0000-62221	COMMUNICATIONS C					
		P1900098	04/25/2019	BANDT COMMUNICATIONS INC	TROUBLESHOOTING RADIO	103.50
30-3905-0000-62410	R & M-VEHICLES					
			04/04/2019	GORDIE BOUCHER FORD LINCOLN ME	TIRES VAN 21	2,259.24
		P1900671	04/25/2019	GORDIE BOUCHER FORD LINCOLN ME	WIPER BLADES VAN 18	2,886.48
		P1901358	04/25/2019	BUDGET TRUCK AND AUTO BODY INC	REPAIRS TO VAN 20	11,604.74
30-3905-0000-63501	GAS & FUELS					
		P1900925	04/18/2019	KWIK TRIP EXTENDED NETWORK	FUEL FOR APRIL 2019	7,676.00
30-3905-0000-64629	OTHER TRANSP.EXP					
		P1900774	04/11/2019	OCCUPATIONAL HEALTH AND WELLNE	POST ACCIDENT J SENNETT	163.42
		P1901262	04/11/2019	FOOTVILLE FIRE DEPARTMENT	AMBULANCE SERVICE ON 02-07-201	750.00
		P1901274	04/11/2019	A AND J VANS INC	WIS TITLE AND LICENSE FEE	194.00
30-3905-0000-67105	MOTOR VEHICLES					
		P1901274	04/11/2019	A AND J VANS INC	ADD ON TO 2018 FORD F350	7,833.00
ELDERLY & HANDCAPPED TRANSP PROG TOTAL						59,502.40

ROCK COUNTY

**COMMITTEE REVIEW REPORT
WITH DESCRIPTION
FOR THE MONTH OF APRIL 2019**

04/25/2019

Account Number	Account Name	PO#	Check Date	Vendor Name	Description	Inv/Enc Amt
30-3915-0000-64200	TRAINING EXP					
		P1901247	04/04/2019	KOLTYK,JO ANN	PAYMENT FOR FACILITATING	500.00
					TITLE III-E FAM CAREGIVER SUPP PROG TOTAL	500.00
30-3915-1401-64615	CLIENT REL.COSTS					
		P1900094	04/04/2019	ALTERNATIVE HOME CARE INC	RESPITE CARE FOR V SCHMITZ	140.00
		P1900100	04/04/2019	BRIGHTSTAR	RESPITE CARE FOR A CYNNOVA	162.00
		P1900995	04/04/2019	HERNANDEZ,RUTH	REIMB FOR YMCA MEMBERSHIP	154.00
		P1901151	04/25/2019	RICHARDSON,KATHY	REIMBURSEMENT FOR RESPITE	110.00
		P1901260	04/11/2019	WARD,DIANNE	REIMBURSEMENT FOR SUPPLIES	158.39
					II-E CAREGIVER COUNSELING PROG TOTAL	724.39
30-3916-0000-62625	OUTREACH SERVICE					
		P1900604	04/18/2019	MENARDS	KEY ORGANIZER	3.99
					MOBILITY MANAGER GRANT PROG TOTAL	3.99
30-3920-1401-64615	CLIENT REL.COSTS					
		P1900094	04/04/2019	ALTERNATIVE HOME CARE INC	RESPITE CARE FOR J LAVEEN	410.00
		P1900100	04/25/2019	BRIGHTSTAR	RESPITE CARE FOR A CYNNOVA	243.00
		P1900820	04/25/2019	OCHSMAN INC	RESPITE CARE FOR H & J PAQUIN	75.00
		P1901150	04/25/2019	DOLL,BOB	REIMBURSEMENT FOR RESPITE	173.96
		P1901199	04/25/2019	OLSON,SUE	REIMBURSEMENT FOR RESPITE	156.00
		P1901265	04/25/2019	CLEMONS,JULIE	REIMBURSEMENT FOR REPITE	1,883.71
		P1901294	04/18/2019	ZENKE,DEBEE	REIMB FOR RESPITE CARE	500.00
		P1901348	04/25/2019	SEVERANCE,LINDA	REIMBURSEMENT FOR RESPITE	192.00
					AFSCP CAREGIVER COUNSELING PROG TOTAL	3,633.67
30-3920-1405-64615	CLIENT REL.COSTS					
		P1900991	04/04/2019	ALMOST FAMILY	RESPITE CARE FOR B SWENEY	400.00
					AFCSP RESPITE - IN HOME PROG TOTAL	400.00
30-3921-0000-64200	TRAINING EXP					
		P1901248	04/04/2019	WISCONSIN ASSOCIATION OF BENEF	REGISTRATION: LACHEL FOWLER	125.00

COMMITTEE: ET - SENIOR CITIZEN PROGRAMS

ROCK COUNTY

**COMMITTEE REVIEW REPORT
WITH DESCRIPTION
FOR THE MONTH OF APRIL 2019**

04/25/2019

<u>Account Number</u>	<u>Account Name</u>	<u>PO#</u>	<u>Check Date</u>	<u>Vendor Name</u>	<u>Description</u>	<u>Inv/Enc Amt</u>
BENEFIT SPECIALIST GRANT PROG TOTAL						125.00

I have reviewed the preceding payments in the total amount of \$76,436.29

Date:

Dept Head _____

Committee Chair _____

ROCK COUNTY

COMMITTEE REVIEW REPORT
WITH DESCRIPTION
FOR THE MONTH OF APRIL 2019

04/25/2019

Account Number	Account Name	PO#	Check Date	Vendor Name	Description	Inv/Enc Amt
38-3800-0000-63200	PUBL/SUBCR/DUES	P1901403	04/25/2019	NACVSO	2019 ANNUAL DUES- J SOLIS	60.00
VETERANS SERVICE PROG TOTAL						60.00

I have reviewed the preceding payments in the total amount of \$60.00

Date:

Dept Head _____

Committee Chair _____

ROCK COUNTY

**COMMITTEE REVIEW REPORT
WITH DESCRIPTION**
FOR THE MONTH OF APRIL 2019

04/25/2019

Account Number	Account Name	PO#	Check Date	Vendor Name	Description	Inv/Enc Amt
30-3904-0000-64907	VOL RELATED EXP					
		P1901320	04/18/2019	CIMA COMPANIES INC,THE	VOLUNTEER INSURANCE SERVICES	595.98
DELIVERED MEALS PROG TOTAL						595.98

I have reviewed the preceding payments in the total amount of **\$595.98**

Date:

Dept Head _____

Committee Chair _____

**AGING/ADRC/TRIBAL ADRS ONE-TIME AND CARRYOVER FUNDING REQUEST
APPLICATION**

Funding Request 2019

Please complete this form to request 2019 one-time funding. Completion of this form is voluntary; however, the information requested is required as part of the one-time funding approval process. Completed forms should be submitted to DHSRCTeam@wisconsin.gov.

NOTE: Applicants must be directors of a county/tribal aging unit or ADRC or tribal ADRS supervisors

Aging Unit/ADRC/Tribe Name
ADRC of Rock County

Phone 608-741-3684	Email Jennifer.Thompson@co.rock.wi.us	
Address 1900 Center Avenue	City WI	Zip Code 53545

General Requirements

Project Area (check all that apply)

- Aging and ADRC Integration Planning and Transition
 ADRC and Tribal ADRS Sustainability and Improvement

Affirm that the request meets the following requirements:

- Funding is for one-time costs only.
 Costs will be incurred in 2019 (calendar year 2019 for counties, federal fiscal year 2019 for tribes).
 Costs are allowed under the ADRC or Tribal ADRS Scope of Services.
 Funds are not for capital expenses.
 If shared across multiple business units, a cost allocation methodology is attached.
 Requested funding will not supplant existing funding as demonstrated on the attached budget projection.

Project Narrative

Clearly address how the requested funding addresses a critical problem. Provide all of the following:

1. A clear explanation of the functional problem or issue that will be addressed with one-time and/or carryover funding. For physical plant requests, accessibility/ADA assessments are not required but could be included to further explain the issue.
2. An analysis of the causes of the problem or issue.
3. A determination and description of what other mitigation measures have taken place to address the issue.
4. A clear explanation of how the one-time funding will demonstrate improvement of the ADRC's or tribal ADRS' program, contributing to the long-term sustainability in the community and/or moving the organization towards integration.

1. Rock County currently operates two separate departments: the Council on Aging (COA) and the Aging and Disability Resource Center (ADRC) which falls under the Human Services Department. Although the two departments work well together, it is recognized there may be additional benefit if the County were to investigate integration. Potential benefits include: efficiencies in operating programs, additional fiscal oversight, partnering in marketing materials, shared staff which in turn could make programs more robust and available to the public, and lastly, less confusion for Rock County residents to know where to go for assistance. Because of these factors, Rock County would like to investigate integration of the two departments and evaluate the potential benefits.
2. Although the Department of Health Services has encouraged integration for years, Rock County determined in 2013 when the ADRC was built, it would remain separate from the COA. Due to the fact the departments have operated smoothly over the last six years, there was no emergent need to integrate. However, since the retirement of the COA director, County Administration felt it was a good opportunity to re-evaluate the

operational structures of both departments and determine what, if any, benefits could result from integrating the two departments.

3. The County Administrator has had dialog with: 1. DHS and GWAAR on the process by which the county would move forward with integration (should that be the decision); 2. COA Advisory Board and ADRC Advisory Committee, separately and jointly to hear their opinions on integration, and; 3. COA staff and ADRC staff to hear their thoughts on the impact integration would have on staff and the public. In addition, the ADRC Division Manager and Interim Aging Director have spoken to other counties in the state who have gone through the integration process and shared what they learned with their respective committee. It has been through these conversations-specifically, with the joint committees that generated feedback indicating a need for an unbiased party to assist in determining if integration is in the best interest of Rock County. Therefore, a recommendation was put forward to request one-time funds for a facilitator to investigate integration of the ADRC and COA functions.

4. Rock County has contacted UW Extension-Waukesha Area Director, Jerry Braatz, to assist in facilitating the investigative process and provide a recommendation from the analysis of his findings and conversations with stakeholders and staff. Mr. Braatz has an extensive resume (attached) including experience in leading successful strategic planning projects and gathering community/public input from focus groups and surveys for local developments. Mr. Braatz has provided Rock County with a comprehensive plan to meet the ADRC and COA committees' requests. Please see the attached, "Rock County ADRC and COA Strategic Investigation" for the detailed plan. Rock County is confident that with Mr. Braatz experience, unbiased position and understanding of the issues, we will obtain a definitive result.

\$18,855 Request amount (must be at least \$5,000)

Funding Request and Budget Projection Worksheet

Complete all sections of the worksheet (F-02034). The worksheet has two tabs: the funding request worksheet and the budget projection worksheet. Both should be completed. For the funding request worksheet, provide a description of each requested item, and indicate the amount of funding requested for each requested item.

Required Signatures indicating support and approval of the funding request and plans for integration.		
SIGNATURE – Aging Director	Date Signed	Print name
SIGNATURE – ADRC Director	Date Signed	Print name
SIGNATURE – Tribal ADRS Supervisor	Date Signed	Print name
SIGNATURE – Tribal ADRS	Date Signed	Print name

November 2019

- Complete final draft report that includes the environmental scan, input from focus groups, facilitated discussion results along with a recommendation
- Present the key points of the final draft report to the Study Committee and interested stakeholders to receive input
- Discuss input received from stakeholders with Study Committee and finalize report
- Provide electronic copy of final report and electronic copy of final presentation to Rock County

Rock County ADRC and COA Strategic Investigation Budget
June 1 - November 31, 2019

<u>Staff</u>	<u>Budget</u>
Waukesha County Extension CRD Educator & Area Director	\$16,751
<u>Program Expenses</u>	
Focus groups supplies (<i>office supplies - markers, flip chart, USB etc</i>)	\$250
Printing (<i>printing materials; handouts and related documents</i>)	\$300
<u>Travel</u>	
Mileage 118 miles round trip x 20 trips x .58/mile (state rate)	\$1,369
TOTAL PROJECT COST	\$18,670

Rock County ADRC and COA Strategic Investigation

Purpose

The purpose of the facilitated process is to gather information, analyze information, gather input, and discuss the opportunities and concerns with regard to integration of the ADRC and COA in Rock County. The end result of this process will be a report that captures this information and provides a recommendation for county policy makers to consider.

Background

State statutes focus on our responsibility as a state to assure that all elderly and disabled persons have available and accessible continuum of care or a wide range of community support services so that they remain in their homes and neighborhoods for as long as possible. State Statute 46.82 further defines an "Aging Unit" staffed by an aging unit director and necessary personnel, directed by a county commission on aging that can be an agency of county government with the primary purpose of administering programs of services for older individuals of the county. Under State Statute 46.283 a county can also create an aging and disability resource center under contract with state. The resource center can be operated by a county department or an aging unit. In 2019, 51 counties in the state operated with a combined aging and disability resource center and aging unit. The other 21 counties including Rock County operated with a separate aging and disability resource center and aging unit.

In 2010, Rock County had 160,331 residents with 21,759 residents of age 65 and over (13.6%). UW Madison Population Laboratory projections show that in 2035 Rock County will have nearly 180,000 residents with nearly 41,000 being 65 and over (22.7 %). The questions that need to be answered through this facilitated process is how will Rock County continue to best provide a quality level of service to an aging 65 and over population that will almost double in size between 2010 and 2035? Is the separation of the aging and disability resource center and Aging Unit going to be able to continue to provide quality services within the parameters of a rapidly aging population or does an integrated single access point approach provide more advantages in maintaining quality services? In order to answer these questions, the following facilitated process is proposed.

Facilitated Process

Role of Facilitator

A facilitator's job is to support everyone to share ideas and do their best thinking. To accomplish this, a facilitator must encourage full participation, promote mutual understanding and cultivate shared responsibility. By providing a supporting environment where participants can do their best thinking a facilitator empowers participants to search for inclusive solutions and build a shared framework of understanding.

Process Timeline

June 2019: Identify stakeholders and create a Study Committee made up of 8 to 10 members.

- Facilitator to meet with each Study Committee member individually to discuss process and to identify any upfront concerns members may have going into this process
- Facilitator to meet with staff to discuss process and identify any upfront concerns members have going into this process

July 2019: Complete Data Environmental Scan by collecting and analyzing following data

- Demographic Data for Population of Age 65 and Over
- Inventory of services provided by Rock County ADRC and Rock County Aging Unit
- Budget Trends for Rock County ADRC and Rock County Aging Unit
- Survey integrated benchmark Counties (Kenosha, Winnebago, Racine, Eau Claire, and LaCrosse) to identify why they integrated, challenges they had to overcome and impacts of integration
- Survey non-integrated benchmark Counties (Fond du Lac, Sheboygan, and Outagamie) to determine if they are considering integration, what strengths they see by continuing to have a separate ADRC and Aging Unit model and what challenges this separation is causing.

August 2019

- Present Environmental Scan Results to Study Committee and stakeholders
- Work with Study Committee to develop focus group questions and identify focus group participants
- Conduct 3 focus groups that engage 18 to 24 participants

September 2019

- Conduct additional 3 focus groups that engage 18 to 24 participants
- Analyze focus group information and identify themes
- Present results of focus groups to the Study Committee

October 2019

- Facilitate discussions with Study Committee to identify strengths and challenges of integration
- Further facilitate discussions on how challenges might be overcome

JEROLD E. BRAATZ, AICP
515 W. Moreland Blvd, AC G22
Waukesha, Wisconsin 53188
(262) 548 7786

POSITIONS HELD

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

2010-Present, Department Director, 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, 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 and in St. Lucia.

Strategic Planning

I provided and facilitated strategic planning and organizational development education to non-profit groups and local government units in Waukesha County, Wisconsin. Examples of strategic planning and facilitation 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 Chamber of Commerce, The Village of Hartland, Wisconsin, the Village of Mukwonago, City of West Allis, 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, the University of Wisconsin-Waukesha Field Station, 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 of 19 professionals, teaching and implementing educational program outreach, facilitating strategic planning processes, coaching staff, and developing grants and budgets. I serve as a member of the interdisciplinary UW-Extension Organizational Development Team. As part of this effort, I have taught over 100 UW-Extension professionals the eight steps of leading change in an organization.

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, the Phoenix Heights Neighborhood Learning Community, Harlan, Iowa Community Leadership Program, and the Estherville, Iowa Community Leadership Program. In addition, trained AmeriCorps Vista interns how to conduct focus groups with residents in the Phoenix Heights and Haertel Field neighborhoods in Waukesha.

LEADERSHIP AND MANAGEMENT EXPERIENCE

Needs Assessments

Designed needs assessments processes in Calumet County to engage the public and identify local programming needs for the UW Cooperative Extension office. I replicated this process with the City of Oconomowoc Parks, Recreation, and Forestry Department and the Public Library. 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.

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 \$4.25 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, 2015, and 2016 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

Doctor of Philosophy, Department of Educational Administration, University of Nebraska, Lincoln Nebraska. ABD, currently engaged in dissertation research on higher education charter models as a tool for diversifying funding. Anticipated Graduation is December 2019.

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, strategic planning, organizational development, leadership, planning law, affordable workforce housing, and negotiation.