

# 2014

## Accomplishment Report



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# ORGANIZATIONAL DEVELOPMENT

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## SUCCESS STORY

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### WASHINGTON COUNTY NONPROFIT TRAINING SERIES RESPONDS TO LOCAL NEEDS

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**Situation:** In August 2012, representatives from 33 nonprofit organizations discussed the findings of a survey that determined the financial health, trends and concerns of nonprofits serving Washington County. The survey found that from 2010 to 2011, demand for nonprofit services increased, while staffing levels and funding remained the same or decreased. Additionally, the survey found 85.7% of the nonprofits responding indicated obtaining funds was challenging, 85.7% indicated recruiting new donors was challenging, 75.0% indicated maintaining donors was challenging, and 82.1 % reported that they were not currently undertaking an endowment campaign.

These results are similar to those found by FORWARD Investments, who received 311 responses from a statewide survey of Wisconsin nonprofits conducted in 2012. This survey found that “demand for services has increased; total revenues, total expenses, staffing levels, employee benefits, and in-kind support have remained stagnant; and external financing has decreased.”

After discussing the survey results, local nonprofits concluded that more collaboration is needed amongst the nonprofit sector in Washington County and nonprofits need to seek out new and diversified funding sources to sustain and grow services to meet demands.

**Response:** To serve as a catalyst for nonprofit collaboration and financial education, a coalition comprised of the UW-Extension, UW-Washington County, United Way of Washington County and the Volunteer Center of Washington County hosted four nonprofit workshops in 2014.

The first workshop was entitled “Financial Training for Board Members,” which had 22 participants. A local certified public accountant provided training on balance sheets, basic accounting, controls and fraud. 85% of the participants evaluated the program content as good or excellent.

The second was entitled “Building a Board Fundraising Culture,” which had 50 participants attend. A Milwaukee-area fundraising expert provided an overview of developing fundraising policies, setting board fundraising expectations, understanding board and staff roles in fundraising, building a compelling case statement and understanding donor motivations. 89% of the participants evaluated the program content as good or excellent.

The third was entitled “Outcome Basics,” which had 50 participants. Measuring outcomes has become increasingly important to funders, including foundations and the United Way. Two representatives from the United Way of Waukesha County presented on how to use Logic Models to identify outcomes and impact indicators. 88% of the participants evaluated the program content as good or



excellent.

The fourth was entitled “Indicators and Measuring Outcomes- Measure Well and Use the Results,” which had 45 participants. Two representatives from the IMPACT Planning Council presented how to measure outcomes in order to communicate the results. 94% of the participants evaluated the program content as good or excellent.

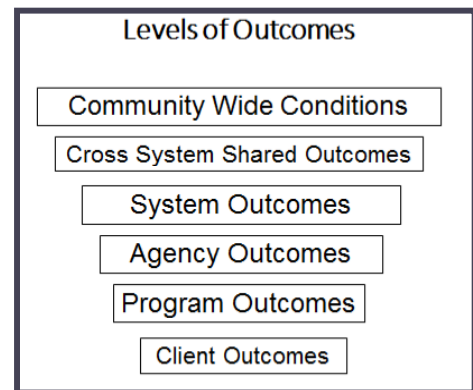
**Results and Evidence:** A retrospective pre-than-post evaluation was conducted at the conclusion of each of the four sessions. Participants were asked to evaluate how their understanding of the session’s learning objectives changed as a result of attending the session. Additionally, participants were asked to identify what they intend to do in the next three months to apply what they have learned from the session.

Prior to the first workshop, 38% participants rate their understanding of financial statements and basic accounting as good or very good. This increased to 74% after the workshop. Prior to the workshop, 32% rated their understanding of controls and fraud as good or very good. This increased to 94% after the workshop. 59% of the workshop participants plan to apply something they learned from the workshop over the next three months.

Before the Building a Board Fundraising Culture workshop, 37% of the participants rated their understanding of developing organizational policies for fundraising as good or very good. After the workshop, it increased to 74%. Before the workshop, 37% of participants rated their understanding of board and staff roles in fundraising as good or very good. This increased 82% after the workshop. Before the workshop, 31% of participants rated their understanding of building a compelling case statement increased as good or very good. After the workshop, this increased to 68%. Before the workshop, 48% of the participants rated their understanding of donor motivations as good or very good. After the workshop, this increased to 87%. 56% of the workshop participants plan to apply something they learned from the workshop over the next three months.

Before Outcome Basics workshop, 19% of the participants rated their understanding of how to use outcomes as good or very good. After the workshop, this increased to 65%. Before the workshop, 23% of the participants rated their understanding of the difference between the components of a logic model (inputs, activities, outputs & outcomes) and good or very good. After the workshop, this increased to 79%. 69% of the workshop participants plan to apply something they learned from the workshop over the next three months.

Before the Indicators and Measuring Outcomes workshop, 20% of the participants rated their understanding of the eight steps to success in measuring program outcomes as good or very good. After the workshop, this increased to 60%. 83% of the workshop participants plan to apply something they learned from the workshop over the next three months.



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## IMPACT STATEMENTS

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### BOYS & GIRLS CLUB OF WASHINGTON COUNTY

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With locations in West Bend, Jackson, Hartford and Kewaskum, the Boys & Girls Club of Washington County is “dedicated to promoting character building experiences for the youth in Washington County through social, educational and recreational experiences.” The organization’s executive director and board president contacted Paul to facilitate a discussion with board members, trustees and staff regarding the future strategic direction for the organization. In response, Paul facilitated a 5-hour session with 29 participants.



Through evaluation, 84% of the participants agreed or strongly agreed that discussing key strategic issues helped to clarify their direction as an organization. 76% agreed or strongly agreed that the discussion helped set a strategic direction for the organization. 100% agreed or strongly agreed that session allowed them the opportunity to share their ideas while also allowing others to share their thoughts. 92% rated Paul’s facilitation as good or excellent. One participant commented that the process “definitely opened my eyes to some of the directions we need to look at as a board.” Another commented that Paul’s “role in the process was invaluable.”

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### FAMILY CENTER OF WASHINGTON COUNTY

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The Family Center of Washington County strengthens families by providing parent education and family activities. The Executive Director requested that Paul facilitate a process for the board to identify strategic priorities to ensure their continued success. As a result of the process Paul facilitated, all participants agreed or strongly agreed that reviewing past strategic planning efforts provided a foundation for their strategic discussions. 90% agreed or strongly agreed that the discussion allowed an opportunity to review current fundraising efforts and 100% agreed or strongly agreed that the discussions allowed an opportunity to address future fundraising needs. Overall, 80% of the participants rated Paul’s facilitation as excellent and 20% rated it as good. One board member commented “very well organized and helpful” and another commented “great job!”

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### HARTFORD AREA CHAMBER OF COMMERCE

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In order to assist the Hartford Area Chamber of Commerce strengthen its services to members, Paul facilitated two listening sessions to generate qualitative data. From these sessions, 21 participants provided a wealth of information to enhance current and guide future Chamber programming.

Through evaluation, 78% of participants agreed or strongly agreed that the sessions provided an opportunity for thoughtful discussion and that the sessions allowed them the opportunity to share their thoughts and opinions. Overall, 94% of participants rated Paul’s facilitation of the sessions as good or excellent. Comments gathered through evaluation include “very comfortable, easy to share thoughts and ideas. Great session.” Another stated; “great facilitator!”

In order to assist in making the suggestions from the listening sessions manageable, Paul drafted a report that identified five strengths for the Chamber to capitalize on and six opportunities for the Chamber to explore. The Chamber Board reviewed the draft report at their March meeting and created a task force to review the report in greater detail and make suggestions to the Board on how to proceed.

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## HARTFORD AREA DEVELOPMENT CORPORATION

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The Hartford Area Development Corporation (HADC) encourages the expansion and retention of existing industry and commerce within the Hartford Area and fosters additional Industrial, Commercial, and Residential development that supports industry. Their new executive director contacted Paul to facilitate a strategic planning process with the organization's board. HADC had been without an executive director for several months and the organization did not have a current strategic plan. As a result of the process that Paul facilitated, 100% of the participants agreed or strongly agreed that the organizational assessment tool was helpful in identifying strengths and opportunities related to how the board is functioning; discussing their organizational mission helped clarify their role as an organization; discussing organizational vision assisted in identifying a general direction for their organization's future; conducting a SWOC analysis assisted in the identification of internal strengths & weaknesses and external opportunities & challenges; identifying and prioritizing goals increased their ability to identify issues and set priorities; and discussing organizational structure helped strengthen their organization.



Overall, participants evaluated Paul's facilitation as excellent (4.8 on a 5-point Likert Scale). One commented, "Excellent job helping us move the organization forward with consensus!"

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## KETTLE MORAIN YMCA

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Paul facilitated a series of three listening sessions to generate qualitative data to be used during the Kettle Moraine YMCA's 2014 strategic planning process. Each session lasted 60-75 minutes and had a total of 25 participants, including long-term Y members, new members, former members, program participants, community members and non-Y members. A wealth of information and an exhaustive list of responses were generated. In order to make the data manageable, a report was developed that identified common themes for each of the six questions asked during each session.

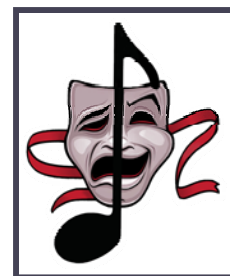
Through evaluation, participants strongly agreed (4.7 on a 5-point Likert Scale) that the sessions provided an opportunity for thoughtful discussion and that the sessions allowed them the opportunity to share their thoughts and opinions (4.8). Overall, participants rated Paul's facilitation of the sessions as excellent (4.6). Comments included; "Great job! I appreciate the opportunity to participate." "Paul's style leads to easy discussion!" "Discussion was open and professional. Paul kept us on task."

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## MUSICAL MASQUERS

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Musical Masquers, West Bend's community theater for over 50 years, contacted Paul to continue facilitating a strategic planning process that was initiated in 2013. Through evaluation of this continued process, board members strongly agreed that an organizational assessment tool was helpful in identifying strengths and opportunities related to how the board was functioning. They also strongly agreed that discussing their organization's mission helped clarify their role as an organization and discussing their organization's vision assisted them in identifying a general direction for the organization's future. 86% of the participants agreed or strongly agreed that discussing organizational structure helped identify a process to accomplish goals. 100% rated Paul's facilitation as good or excellent and one commented "Excellent job! You kept a very good balance between listening to us and jumping in to clarify what some of the issues are."



A draft strategic planning report was developed and Paul continued to work with members to create board member job descriptions, board member commitment forms and committee chair position descriptions.

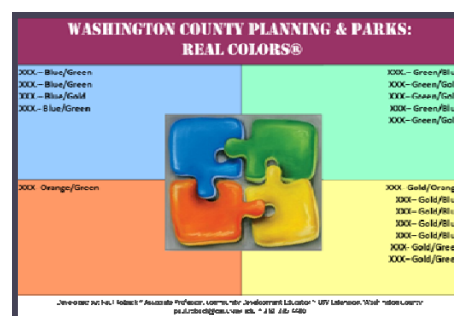
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## REAL COLORS®

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In May 2014, Community Development Educator Paul Roback and Family Living Educator Carol Bralich became certified **Real Colors®** facilitators. Real Colors® is a dynamic workshop experience that increases participants ability to recognize their strengths and the strengths of others, build rapport quickly with others, understand how others process information, and how to use their communication to connect with others.

The new Administrator of the Washington County Planning and Parks Department contacted Paul to facilitate Real Colors® to build rapport among department staff and to improve communication. Paul and Carol facilitated a 2.5-hour session with 19 department staff.



Through evaluation, 100% of participants agreed or strongly agreed that the workshop increased their ability to recognize their strengths and the strengths of others, 72% increased their ability to build rapport quickly with others, 89% increased their ability to understand how others process information and 72% increased their ability to modify their communication to connect with others. 100% evaluated Paul and Carol's facilitation of the session as good or excellent.

The Director of the Washington County Aging & Disability Resource Center (ADRC), contacted Paul to provide staff development by facilitating Real Colors®. Paul facilitated a 3-hour session with 23 department staff. Through evaluation, 100% of participants agreed or strongly agreed that the workshop increased their ability to recognize their strengths and the strengths of others, 95% increased their ability to build rapport quickly with others, 100% increased their ability to understand how others process information and 100% increased their ability to modify their communication to connect with others. 75% evaluated Paul's facilitation of the session as excellent and 25% evaluated it as good.



After the session, Paul provided the ADRC a graphic that illustrates the results of this process. Staff can refer to this graphic to assist with communicating effectively with colleagues.

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### SILVERBROOK INTERMEDIATE SCHOOL

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West Bend's Silverbrook Intermediate School is undergoing significant changes, including a new building addition, new staff and transitioning from having 7<sup>th</sup> & 8<sup>th</sup> grades to having 5<sup>th</sup> & 6<sup>th</sup> grades for the 2014-15 school year. In order to prepare for these changes, Silverbrook's principal contacted Paul to facilitate a process that would develop a mission and core values for school staff.

As a result, Paul facilitated two meetings with participation from 41 school staff. Through evaluation, 88% of the participants agreed or strongly agreed that reaching consensus on their values assisted in identifying the guiding principles for their organization's culture. 79% agreed or strongly agreed that defining their values provided a common meaning for how staff can apply these values in the classroom environment. 92% agreed or strongly agreed that working on their mission statement helped clarify their role as an organization. For the two sessions, 93% rated Paul's facilitation as good or excellent.

After the session, Paul worked with a smaller team of Silverbrook staff to finalize the core values and organizational mission. These will be presented to staff at the start of the new school year.

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### SLINGER FIRE DEPARTMENT

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A representative from the Slinger Fire Department contacted Paul to assist volunteer members in reaching consensus in replacing a fire engine. Members have been meeting for about a year without being able to make a final decision. Through a process Paul facilitated, 28 participants reached consensus on which of the current vehicles to replace, defined three options for new vehicles, identified the advantages of two preferred options and created questions to be researched in order to make an informed decision.

78% of participants agreed or strongly agreed that the session provided an opportunity for thoughtful discussion and 89% agreed or strongly agreed that the session allowed them the opportunity to share their thoughts and opinions. Overall, 74% rated Paul's facilitation as good or excellent. Although consensus was not reached, participants developed and agreed to next steps to follow in order to reach a final decision. A member of the Department's leadership commented that Paul's "professional approach to help organize all of our thought processes was a great help."

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### WASHINGTON COUNTY PLANNING AND PARKS

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The Deputy Administrator of the Washington County Planning & Parks Department contacted Paul to facilitate a series of focus groups to seek input for updating the Washington County Park and Open Space Plan. Three focus group sessions were designed to target recreational businesses, general businesses and non-profit conservation organizations / local government park and recreation departments. Two sessions were held, for a total of 16 participants. Despite several outreach attempts, the third session for general businesses had no attendees.



Overall, 87% of participants agreed or strongly agreed that the sessions provided an opportunity for thoughtful discussions and that the sessions allowed them the opportunity to share their thoughts and opinions. 100% rated Paul's facilitation as good or excellent.

Input from these sessions was shared with the Washington County Planning, Conservation & Parks Committee. Paul then facilitated a process with this committee and key staff that created a vision and guiding principles for the County Park and Trail System. 77% of participants agreed or strongly agreed that discussing a vision assisted in identifying a general direction for the future and 69% agreed or strongly agreed that discussing guiding principles assisted in identifying values and beliefs to guide future decision-making.

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## COMMUNICATING EXTENSION'S VALUE

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### SUCCESS STORY

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#### INCREASING FINANCE COMMITTEE'S UNDERSTANDING OF 4-H MEMBERSHIP FEES

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**Situation:** As part of the Washington County Finance Committee's review of UW-Extension's 2014 budget, committee members expressed a desire to learn more about the 4-H Youth Development Program and its membership fee structure. Although the committee commented that they support the 4-H Youth Development Program, two members stated that 4-H membership fees could be increased to off-set expenses in the overall department budget. The Finance Committee approved the UW-Extension budget as presented by the department head, but requested a separate study process be conducted to examine the 4-H membership fee structure.

**Response:** In his role as Department Head, Community Development Educator Paul Roback worked with 4-H Youth Development Educator Brianna Stapleton Welch to design and implement an inclusive process to respond to the Finance Committee's request. The process and timeline was approved by the Education and Culture Committee, which oversees the County Extension office. This process engaged the Washington County 4-H Leaders Association Board, 4-H members through a facilitated listening session, the Washington County Education & Culture Committee and the Washington County Finance Committee.

In each of these sessions, Paul presented an overview of UW-Extension's history, funding and the educational programs offered through the Washington County office. Additionally, Paul presented an overview of the office's budget and how the county's funding is used to leverage State and Federal dollars. Brianna presented an overview of the 4-H Youth Development Program in Washington County, benefits of participation, the financial impact of volunteers, the geographic distribution of family involvement by county supervisory district, an overview of membership and program fees, expense profiles of four sample participants, and a comparative analysis of peer counties. This presentation demonstrated the return on the county's investment in the UW-Extension office.

**Results/Evidence:** After presenting to the Finance Committee, the committee thanked Paul and Brianna for their research and stated their support for 4-H Youth Development Programs in Washington County. Although some committee members still expressed that membership fees could be raised in the future

to cover rising costs in the office, no motion was made to change the current fee structure. Materials developed as part of this process have been shared with UW-Extension colleagues in Fond du Lac, Marathon, Sheboygan and Winnebago Counties.

## IMPACT STATEMENT

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### DEVELOPING AN INCLUSIVE OFFICE MARKETING PLAN & POLICIES

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In his role of Department Head, Paul works to inform elected officials and citizens of the programs and services of the UW-Extension office. Recognizing the need for an office-wide strategy, Paul initiated the development of an office-wide plan that communicates the outcomes of Extension programs to community stakeholders, including elected officials, program collaborators and university administrators; expands engagement with existing audiences; reaches new audiences; and increases local stakeholder support for County Extension Office. The plan details all marketing and promotion activities into one concise document to ensure consistent messages across program areas. All staff in the office reviewed and provided feedback to improve the plan and policies. Paul contacted UW-Extension Publications Unit, which also provided feedback that was incorporated into the plan.

As a result of this process, a Power Point was created so that the office team can consistently inform stakeholders of UW-Extension Programs. This was presented to the Washington County Board, 4-H Leaders Association and the West Bend Chamber of Commerce Leadership Class. Additionally, each educator provides monthly blog posts to the office web page, contributes to monthly newsletters and authors articles in the local newspaper. Support staff update office marketing items with proper logos and Equal Employment Opportunity (EEO)/Affirmative Action (AA) statements, restock brochures and literature, update the webpage and create monthly newsletters.

## EDUCATIONAL CONTACTS

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<b>Direct Contacts</b>	
Organizational Development	737
Local Government Education	38
Communicating UW-Extension's Value	162
Other Programs	119
Total	1,056
<b>Indirect Contacts</b>	
Economic Indicator E-Newsletters	1,206
Local Government E-Newsletters	136
Non-Profit E-Newsletters	66
UW-Extension E-Newsletter	126
UW-Extension Monthly Newsletter	756
West Bend Daily News Articles	17,600
Total	19,890