

**2008**

**Accomplishment Report**



**Paul Roback**

**Community Development  
Educator**

**UW-Extension, Washington  
County**

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# TOURISM RESEARCH, PLANNING & DEVELOPMENT

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## SUCCESS STORY

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### WASHINGTON COUNTY TOURISM INITIATIVE

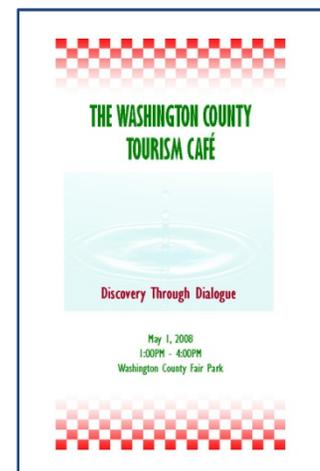
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**Situation:** For the past 30 years, Washington County has had various forms of tourism promotion. Initially starting as an organization of volunteers, countywide tourism promotion eventually became the Washington County Convention and Visitors Bureau (CVB). The CVB has a full-time executive director and a small operating budget. Approximately half of the budget is funded by the County. Although the CVB is the umbrella organization for leading tourism promotion efforts in the county, many stakeholders believe that the CVB is under-resourced and unable to be capable and successful in drawing major events of larger economic significance to the county. As a result, several stakeholders have expressed to the County their frustration with the current tourism promotion model.

In order to determine the best approach for promoting countywide tourism that has the widest base of support from the many identified interest groups, the County Education & Culture Committee instructed Paul Roback, Community Development Educator at UW-Extension Washington County, to undertake the Washington County Tourism Initiative. The desired outcome of this initiative was to build consensus with a variety of tourism related stakeholders in the County in order to identify and address community needs in the development of a tourism strategy.

**Response:** In order to address this issue and to achieve the desired outcome, an action plan was developed by Educator Roback and approved by the County Administrative Coordinator and the Education & Culture Committee. This plan consisted of:

- Conducting face-to-face interviews with over twenty key stakeholders in tourism related organizations in Washington County. As a result of these meetings, ten strategic tourism issues were identified.
- Implementing an on-line survey to solicit input from staff of tourism related organizations, board members of tourism related organizations, elected/appointed officials and owners/employees of tourism related businesses. This survey was completed by 51 individuals and resulted in identifying six key opportunities for tourism.
- Conducting a half-day event with 36 key tourism stakeholders that included facilitating a Washington County Tourism Café, which was designed to foster constructive dialogue, access collective intelligence and create innovative possibilities for action. This process was based on concepts developed by Juanita Brown, author of “The World Café.”



**Results:** Educator Roback presented the findings from this initiative to the Education & Culture Committee and included them in a 32-page report. This concluded Educator Roback's role in the tourism initiative. Although consensus was not reached with all county tourism stakeholders, the Administrative Coordinator utilized the findings from the report to develop a course of action. In the development of the 2009 budget, the County Board did not include funding for the CVB. Although this may not have been the desired outcome at the beginning of this initiative, the findings allowed for thoughtful discussion and informed decision making by the County Board.

**Evidence:** The Administrative Coordinator sent the following e-mail to Educator Roback after the Café. "I was very pleased and impressed with the good job you did yesterday leading our conversation on Tourism. I heard many positive comments about your work from the other participants." Through evaluation of the Café, participants strongly agreed that the "The World Café" format created a hospitable environment, encouraged everyone's contribution, connected diverse perspectives, allowed an opportunity to meet new people and allowed for the exploration of ideas. At the conclusion of the Tourism Initiative, the Administrative Coordinator commented that "the report prepared is very well done and fully meets my expectations."

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## ORGANIZATIONAL DEVELOPMENT

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### SUCCESS STORIES

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#### STRATEGIC PLANNING WITH THE MILWAUKEE AUDUBON SOCIETY

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**Situation:** The Milwaukee Audubon Society, Inc. (MAS) was incorporated in 1974 as a non-profit corporation and is a local chapter of the National Audubon Society. The MAS is currently governed by a five person board and holds regular meetings at the Schlitz Audubon Nature Center, which is located in the Village of Bayside (Milwaukee County). The Board had been as large as 21 members, but the majority of members have left for various reasons over the past several years. Recently, the MAS chapter has grown to more than 1,900 members from Milwaukee, Ozaukee, Washington and Waukesha Counties.

With the departure of several board members, a new president, no staff and no strategic plan, there was interest by the board to identify and prioritize goals and activities for the next several years. Due to the vacancy of the Community Development Educator position in Milwaukee County, the current MAS Board President contacted Paul Roback, Community Development Educator at UW-Extension Washington County, to undertake a strategic planning process with the MAS Board. Roback informed the Milwaukee County UWEX office of this request and partnered with Gail Epping Overholt, Milwaukee River Basin

Educator, in facilitation of a strategic planning process. The MAS service area covers the majority of Washington County. Providing organizational development programming to Washington County non-profits was identified in a 2007 visioning process for the Community Development Educator position.

**Response:** During a pre-planning meeting, a process was identified and agreed to by a subcommittee of the MAS Board. Roback and Epping Overholt facilitated two meetings, which resulted in the completion of a board organizational assessment tool, the creation of maps of the MAS service area, a zip code analysis of MAS chapter members, updated mission statement, development of a vision statement, force field analysis, stakeholder analysis and prioritized goals. Roback facilitated a third meeting to develop action plans.

**Results:** As a result of the strategic planning process, board members have started to implement their action plans. Short-term outcomes include the development of a draft operational budget, a short-term investment plan, a position description and funding for one employee, a draft newsletter, updated website, relationship building with a partner organization, development of the 29th Annual Natural Landscapes Conference and the preliminary approval of the establishment of a small grant program for natural resource education for non-profits and organizations. Additionally, the MAS Board has a better understanding of their service area and location of chapter members. Roback is scheduled to meet with the MAS Board in July 2009 to measure longer-term outcomes.



**Evidence:** Through evaluation, Board members agreed that creating action plans increased their ability to focus goals into future actions (a 4.3 on a 5-point Likert scale). One Board member commented that “this was helpful to a redeveloping organization! Thanks for a good facilitation.” Additionally, Board members evaluated Roback’s facilitation of the strategic thinking process as excellent (a 4.8 on a 5-point Likert Scale). One Board member commented that Roback’s facilitation “exceeded expectations.”

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#### STRATEGIC PLANNING WITH SENIOR CITIZENS ACTIVITIES, INC.

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**Situation:** Founded in 1967, the Senior Citizens Activities, Inc. (SCA) is a non-profit organization located in West Bend that promotes an improved quality of life for seniors in Washington County. This is accomplished by offering a place and resources where seniors age 55 and older can meet for socialization, discussion, support, various activities, classes, educational programs, and healthcare, exercise and therapies.

The SCA is governed by an eleven person board and employs a full-time center director, a part-time secretary and a part-time receptionist. Funding is provided by Washington County, City of West Bend, United Way of Washington County, donations and numerous fundraisers. Recently, the SCA has been experiencing financial difficulties and the SCA Board is concerned about the long-term fiscal viability of the current organization.

The SCA Board President contacted Paul Roback, Community Development Educator at UW-Extension Washington County, to undertake a strategic planning process with the SCA Board. With the election of several new board members and a new president, there was interest by the board to identify and prioritize goals and activities for the next year. Providing organizational development programming to Washington County non-profits was identified in a 2007 visioning process for the Community Development Educator position.



**Response:** After several initial planning meetings, strategic issues were identified and formed the basis for moving forward with the strategic planning process. Educator Roback facilitated six meetings, which resulted in the development of an environmental scan, edited mission statement, vision statement, force field analysis, stakeholder analysis, prioritized goals and an action plan. Additionally, Roback facilitated a meeting of potential collaborators, including representatives from the Washington County Aging and Disability Resource Center, City of West Bend Park and Recreation Department and Cedar Community, a non-profit senior community in West Bend.

**Results:** As a result of the strategic planning process, SCA board members have started to implement their action plans. Short-term outcomes include the development of a draft membership policy, identification of a volunteer to assist with marketing and initial discussion of program collaborations with UW-Washington County and Moraine Park Technical College. Roback is scheduled to attend the May 2009 board meeting to measure longer-term outcomes.

**Evidence:** Although the SCA was incorporated over 40 years ago, this was their first time undertaking a strategic planning process. Through evaluation, participants strongly agreed that the nominal group process of identifying and prioritizing goals increased their ability to identify issues and set priorities (a 4.9 on a 5-point Likert Scale). Participants also agreed that creating action plans increased their ability to focus goals into future actions (a 4.1 on a 5-point Likert Scale). One participant commented this organization “would never have gotten this far (maybe not anywhere?) without your help. You’re doing an excellent job, and we all certainly appreciate it very much!”

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## IMPACT STATEMENTS

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### INTERFAITH CAREGIVERS OF WASHINGTON COUNTY

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Washington County Community Development Educator Paul Roback facilitated two strategic planning sessions for the board of Interfaith Caregivers of Washington County, which resulted in the development of a board vision statement, prioritized goals and action plans. Participants strongly agreed (4.75 on a 5-point scale) that creating action plans increased their ability to focus goals into future actions. Additionally, Roback implemented an organizational assessment survey that measured how board members perceived their board and organization was functioning. Roback then compared the strengths and opportunities identified in this survey with a similar survey that was conducted in 2005. In 2005, there were ten strengths and fifteen opportunities that were identified. In 2008, there were nineteen strengths and nine opportunities that were identified. This demonstrates that in the past two years, the Interfaith Board has successfully capitalized on many opportunities that were identified in 2005 and turned them into organizational strengths. The Board indicated that the organizational assessment survey was very helpful in providing an overview and identifying strengths and opportunities related to how the board of the Interfaith Caregivers is functioning (a 5.0 on a 5-point scale). Through evaluation, one participant commented that Roback “was a great speaker and made sure to get everyone’s input included in our planning.”

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### HARTFORD PROJECT CARE

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Washington County Community Development Educator Paul Roback facilitated two strategic thinking sessions for the board of Hartford Project Care, which resulted in the development of prioritized strategic goals. Utilizing these prioritized goals, Roback facilitated the development of action plans with the board. Participants agreed (4.4 on a 5-point scale) that creating action plans increased their ability to focus goals into future actions. Through evaluation, one participant commented that they “appreciate facilitating our ability to establish a strategic direction for organization.”

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### NON-PROFIT TOOLBOX

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Washington County Community Development Educator Paul Roback worked in partnership with the Volunteer Center of Washington County, UW-Washington County and the United Way of Washington to survey 150 Washington County area nonprofit, civic, service, religious, and municipal organizations to determine their professional development needs. With a response rate of 20%, the survey identified fundraising strategies, major gifts/endowments and planning for and managing change as three priority needs.

Since there are several other professional development opportunities for building capacity in fundraising strategies and developing major gifts/endowments, the coalition developed a low cost workshop on planning for and managing change. Lacking expertise in this

subject, Roback identified Shirley Bufford at the Government Affairs Department at UW-Milwaukee's School of Continuing Education to provide instruction. As a result of this partnership, twenty-four participants learned how to plan for and manage change for their organizations.

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## **COMMUNITY AND ECONOMIC DEVELOPMENT PREPAREDNESS**

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### **IMPACT STATEMENT**

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#### **FIRST IMPRESSIONS EDUCATION**

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Washington County Community Development Educator Paul Roback presented to the Kewaskum Village Board on a community assessment program entitled "First Impressions." This innovative program was developed by Andy Lewis at the UW-Extension Center for Community and Economic Development and has been implemented in over 125 communities across the State, Nation and Ontario. The presentation provided an overview of how the program operates, benefits of conducting this program, a timeline for implementation and possible outcomes. The purpose of the presentation was to build capacity with the Village Board to assist in their decision making process of participating in a community assessment program. Of the twelve participants, ten completed an evaluation and indicated that they gained knowledge from the presentation (a 4.0 on a 5-point scale). One participant commented that "Paul's presentation was very informative. The Village appreciates UW-Extension services offered."

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#### **RESPONDING TO LOCAL NEEDS**

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Washington County Community Development Educator Paul Roback responded to various inquiries with university based research and programming. Educator Roback researched and taught administrative forms of county government to the chair of the Washington County Board of Supervisors, provided census demographic information to Economic Development Washington County and the Downtown West Bend Association, provided business start-up assistance to several individuals and communicated monthly with local municipal administrators on various local government programs and resources.

## OTHER LOCAL PROGRAMMING

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### IMPACT STATEMENTS

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#### EMERALD ASH BORER

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In late July 2008, the Emerald Ash Borer (EAB) was discovered in the Village of Newburg, a community that straddles Washington and Ozaukee Counties. This was the first confirmed EAB infestation in Wisconsin. EAB is an aggressive wood borer that attacks and kills all species of ash. Although stressed trees are always more prone to borer attack, evidence from Michigan suggests healthy well maintained trees are also killed by this beetle. Millions of trees in Michigan and other mid-western states have been affected, which in many cases has resulted in the death or removal of these trees. As a result of the infestation in Newburg, the WI Department of Agriculture, Trade and Consumer Protection (DATCP) quarantined all of Ozaukee, Washington, Fond du Lac and Sheboygan counties. Residents and affected businesses are required to not move any hardwood firewood, ash nursery stock, ash logs or timber out of the quarantined area.

In order to communicate information on EAB and the quarantine, a representative from DATCP requested Washington County Community Development Educator Paul Roback to moderate two meetings with representatives from WI DATCP, WI DNR, USDA APHIS and UW-Extension. The first meeting was a government-to-government meeting, which 90 local government representatives from Washington, Ozaukee, Fond du Lac and Sheboygan counties attended to increase



their awareness of this issue. The second meeting was a community information meeting, which approximately 260 people attended. According to Mick Skwarok, WI DATCP, Roback did a “great job moderating...we couldn't have asked for a better performance.”

### PROGRAM STASTICS

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Program	Educational Contacts
Tourism Research, Planning & Development	211
Organizational Development	427
Community & Economic Development Preparedness	96
Other Local Programs	350
<b>Total</b>	<b>1084</b>