

2009

# Accomplishment Report



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## ORGANIZATIONAL DEVELOPMENT

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### BACKGROUND

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In 2008, there were over 500 non-profit organizations registered in Washington County. Many of these non-profits provide vital services that enhance our quality of life, such as matching volunteers with elderly residents for transportation to medical appointments, providing positive role models and activities for youth, and protecting natural areas for the enjoyment of future generations.

On June 30, 2009, President Obama told representatives of nonprofit programs during a White House gathering that “solutions to America's challenges are being developed every day at the grassroots. And government shouldn't be supplanting those efforts; it should be supporting those efforts.” Since 1976, Washington County has been supporting the efforts of county non-profits through the efforts of UW-Extension Washington County. Community Development Educator Paul Roback continues this tradition by providing organizational development resources to assist these organizations in prioritizing goals and developing action plans to ensure their success.

### SUCCESS STORY

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#### THE HEALTHY PEOPLE PROJECT OF WASHINGTON COUNTY

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**Situation-** According to the State of Wisconsin’s County Health Rankings, obesity in Washington County adults has increased to 63%. Additionally, less than half the residents of Washington County report meeting the recommended levels of moderate physical activity and 61-percent meet the goal of two fruits per day and 23-percent meet the goal of three vegetables per day.

In December 2006, the YMCA and Washington County Health Department co-sponsored a public forum related to obesity, which resulted in the development the Healthy People Project of Washington County (HPPWC). The HPPWC is a coalition of eight members representing the public, private and non-profit sectors. It was formed to implement proven strategies to increase fruit and vegetable consumption and increase the amount of physical activity among Washington County residents.

The co-chairs of the HPPWC met with UW-Extension Community Development Educator Paul Roback and requested assistance in the development of an organizational structure that utilizes the talents and interests in the HPPWC members in fulfilling their organization’s mission. This request for facilitation is consistent with the position description for Paul Roback and the needs assessment conducted for the UW-Extension Washington County in 2007, which identified healthy individuals & families and building family & community strengths as issues to be addressed in Washington County.

**Response-** Roback attended the Pioneering Healthier Communities National Conference in Washington DC with the members of the HPPWC in order to gain first-hand knowledge of the subject matter and to develop the skills necessary to efficiently and effectively facilitate for HPPWC. Funding for this training was obtained through a grant the HPPWC received from YMCA USA and the Center for Disease Control (CDC).

After the conference, Roback facilitated four strategic planning sessions for the members of HPPWC. Participants reaffirmed the coalition's mission, developed a vision statement, identified key community stakeholders, conducted a SWOT analysis, prioritized goals and developed an action plan. Roback compiled a draft strategic plan that was adopted by HPPWC members.



HPPWC members and Paul Roback at the Pioneering Healthier Communities National Conference

**Results-** As a result of the strategic planning process, an organizational chart was developed and several steps in the action plan were completed. One action step included the development of an eleven member Community Partner Advisory Team, which includes the Mayor of West Bend and a local State Representative. Another completed action step was the development of a community action plan, which details specific steps the HPPWC will assist county residents to engage in more physical activity and healthier eating. Through evaluation, HPPWC members strongly agreed that creating action plans increased their ability to focus goals into future actions (a 4.8 on a 5-point Likert scale). Additionally, participants evaluated Roback's overall facilitation of the strategic planning process as excellent (a 4.8 on a 5-point Likert scale). One participant commented through evaluation that Roback was "a fantastic facilitator; keeping our group on track and moving toward our goals."

**Evidence-** The completed community action plan was submitted to the YMCA USA and the CDC, which resulted in an additional \$60,000 grant to implement the activities detailed in the plan. This includes the development of a county-wide physical activity trail map and a geographic information system (GIS) enabled county-wide trail website. The map and website will be completed in the first half of 2010. Additionally, a national consultant on walkable communities, Mark Fenton, has been retained to work with HPPWC and community stakeholders in May 2010 on sustainable policy changes that will increase physical activity of West Bend residents.

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## IMPACT STATEMENTS

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### VOLUNTEER CENTER OF WASHINGTON COUNTY

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Washington County Community Development Educator Paul Roback facilitated three strategic planning sessions for the board of the Volunteer Center of Washington County. Participants identified organizational values, updated organizational mission, created a vision statement, identified goals and developed action plans for prioritized goals. Through evaluation, participants agreed that creating action plans increased their ability to focus goals into future actions (a 4.3 on a 5-point Likert scale). Roback developed a detailed strategic planning document for the organization, which was adopted by their board. The board president sent an e-mail to Roback stating, "Let me also add my thanks for the very professional job you did and the equally impressive final product. The plan has already become integral at our committee meetings. I am very pleased with this accomplishment."

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### MILWAUKEE AREA LAND CONSERVANCY (MALC)

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Washington County Community Development Educator Paul Roback facilitated three strategic planning sessions for the board of the Milwaukee Area Land Conservancy (MALC). Board members participated in organizational assessment process, developed an organizational flow chart, reaffirmed the organization's mission statement, developed a tag line for marketing, created a vision statement, identified stakeholders, participated in a SWOT analysis, identified goals and developed action plans for prioritized goals. Through evaluation, participants strongly agreed that creating action plans increased their ability to focus goals into future actions (a 5.0 on a 5-point Likert scale). Roback developed a detailed strategic planning document for the organization, which was adopted by their board. Since Roback facilitated the strategic planning process, MALC has hired a part-time executive director and is moving forward with implementing their strategic plan.

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### INTERFAITH CAREGIVERS

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In 2008, Washington County Community Development Educator Paul Roback facilitated two strategic planning sessions for Interfaith Caregivers of Washington County. In 2009, Roback developed a strategic planning document that was approved unanimously by the organization's board. Additionally, Roback facilitated a process that resulted in the development of an organizational chart and revised committee structure for the organization. Since the completion of the planning process, Interfaith has implemented several action steps, including establishing three committees that are regularly meeting, conducting a volunteer orientation, implementing a volunteer and clientele satisfaction survey, developing a board conflict policy and hiring an AmeriCorps person to outreach to local churches.

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## FRIENDS OF ABUSED FAMILIES, INC.

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Washington County Community Development Educator Paul Roback facilitated two strategic planning sessions for the board and staff of Friends of Abused Families. Participants completed an organizational assessment tool, identified core values, updated the organization's mission, created a vision statement, identified stakeholders, participated in a SWOT analysis, prioritized goals, identified objectives and developed measurable outcomes. Through evaluation, participants strongly agreed (a 4.5 on a 5-point Likert scale) that reviewing the organization's mission statement helped clearly define Friends of Abused Families role as an organization. Currently, the Executive Director at Friends is finalizing an action plan and Roback is developing a draft strategic plan document.

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## SCHAUER ARTS & ACTIVITIES CENTER, INC.

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Washington County Community Development Educator Paul Roback facilitated two strategic planning sessions for the board and staff of the Schauer Arts & Activities Center. Participants completed an organizational assessment tool, identified core values, updated their organizational mission, reaffirmed their vision, identified stakeholders, participated in a SWOT analysis, prioritized goals, identified objectives and developed measureable outcomes. Currently, the organization is working on developing action plans and Roback is developing a draft strategic plan document.

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## ORGANIZATIONAL TOOLBOX

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Washington County Community Development Educator Paul Roback collaborated with UW-Washington County, United Way of Washington County and the Volunteer Center of Washington County on a two-part educational series entitled "More for Less." Topics covered in this series included "Planning for and Managing Change" and "Cheap Technology Tools." There were a total of 30 participants for the two workshops. As a result of participant response, another workshop has been scheduled for March 2010.

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## ENTREPRENEURSHIP

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### SUCCESS STORY

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#### INCREASING ENTREPRENEURSHIP IN WASHINGTON COUNTY

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**Situation-** Entrepreneurship is a crucial ingredient in a robust community and a sustainable economy. Timmons and Spinelli define entrepreneurship as "a way of thinking, reasoning and acting that is opportunity based, holistic in approach and leadership balanced." According to the U.S. Department of State, "small businesses provide approximately 75-percent of the net new jobs added to the American economy each year and represent over 99-percent of all U.S. employers."

According to the 2009 US Small Business Administration “The Small Business Economy Report”, approximately seven-percent of the working age population in the U.S. is actively engaged in efforts to start new businesses. This report also stated that of those entrepreneurs who are interested in starting a business, those who completed a business plan were six times more likely to start a business.

**Response-** Paul Roback, UW-Extension Washington County Community Development Educator, provides entrepreneurship resources, including business plan development, to Washington County residents and existing small business. In 2009, Roback collaborated with the UW-Milwaukee Small Business Development Center (SBDC) and Economic Development Washington County in providing two entrepreneurship activities. Prior to Roback’s involvement in this partnership, the SBDC was unable to conduct these activities the past several years in Washington County due to a lack of local coordination and promotion.

**Results-** Fifteen participants attended First Steps, a three hour workshop that reviews a four step process for potential entrepreneurs to assess their readiness, improve their business ideas and avoid common mistakes.

Twelve participated in the Entrepreneurship Training Program (ETP), a 12-week course to develop a business plan for new or existing businesses. During the class, Roback coached six participants while the SBDC class facilitator coached the other six participants. Coaching included facilitating small group discussions each week, providing assistance between classes, reviewing draft plans and evaluating the final business plans. Roback’s coaching resulted in 86 educational contacts to class participants over the course of the program.

**Evidence-** Four of the participants that Roback coached completed their business plans and successfully passed a review by WI Department of Commerce. This successful review allowed each of these participants to receive a \$750 grant, which covered 75-percent of the course fee. These participants strongly agreed (4.8 on a 5-point Likert Scale) that Roback was knowledgeable and competent to teach this topic. One participant that Roback coached informed the SBDC facilitator that they utilized their business plan for refinancing their business properties. The loan officer was impressed by the quality of the plan and inquired what consultant was hired to write the plan. The class participant replied that he couldn’t “explain how it felt to tell him that I had taken a business class through UWM. I told him the design was from the class, but the writing was done by me (with some help).” Overall, seven of the twelve participants completed business plans.



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## LOCAL GOVERNMENT & FINANCE

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### IMPACT STATEMENTS

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#### FAIR PARK STUDY COMMITTEE

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The non-profit organization that operates the Washington County Fair Park overextended their financial resources, had no viable financial plan for the future and was facing the possibility of bankruptcy. This non-profit approached the Washington County Board for financial assistance, which resulted in contentious board

debate. In order to determine Washington County's future involvement with the Fair Park, a study committee was formed. Washington County Community Development Educator Paul Roback was asked by the County Board Chair to facilitate the meetings of the Fair Park Study Committee. Roback's role in this process included meeting facilitation, conducting research, writing the committee's report and presenting this report to the County Board. Roback presented the report to the County Board in September and although it is still a contentious issue, the Board is moving forward with the study committee's recommendations. The County Board Chair sent Roback a note that stated "Thanks again for all your hard work and coordination with the Fair Park Study Committee."



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#### EMERALD ASH BORER (EAB)

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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 trees. In 2009, Washington County Community Development Educator Paul Roback moderated a meeting for WI DATCP, WI DNR and USDA APHIS to report survey results to local governments in Washington and Ozaukee Counties. The survey identified 44 additional infested sites over 7.5 square miles within the two counties. At risk are an estimated 50,000 ash trees in this area. In addition to meeting moderation, Roback e-mailed a summary of the materials to local Washington County municipal administrators and continued to provide educational resources to county residents on request.



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# COMMUNITY & ECONOMIC DEVELOPMENT PREPAREDNESS

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## IMPACT STATEMENTS

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### MARKETING STRATEGIES FOR SMALL BUSINESS

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Washington County Community Development Educator Paul Roback developed curriculum and taught 17 members of the Hartford Business Improvement District (BID) on how to market their downtown businesses in a difficult economy. Participants' business experience ranged from a couple that is opening a business in a few months to a person with over 20 years of business experience. Participants evaluated the quality of the presentation a 4.3 on a 5-point scale. Several experienced business owners commented that the information presented was a good refresher and it reinforced their marketing strategies.

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### 1ST IMPRESSIONS

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The Administrator from the Village of Kewaskum contacted Washington County Community Development Educator Paul Roback to conduct a First Impressions community exchange program. Representatives from Kewaskum requested that a peer community visit Kewaskum to identify community assets to build upon and opportunities to address. Roback presented an overview of this program to the Village Board and Chamber of Commerce. As a result of these presentations, Kewaskum decided to move forward with the exchange. Roback met several times with a planning team and facilitated the development of a work plan, conducted research on possible exchange communities, trained seven Kewaskum community exchange team members, authored a First Impression report on the peer exchange community and developed a presentation. Representatives from Kewaskum will present the report findings and will receive a similar report from the peer community in early 2010.



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### ECONOMIC DEVELOPMENT WASHINGTON COUNTY

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In order to assist Economic Development Washington County (EDWC) in their executive director search, Washington County Community Development Educator Paul Roback was asked by the President of EDWC to provide resources to the EDWC Search Committee. Roback met with this committee and facilitated the development of criteria to evaluate resumes of potential candidates. Roback then evaluated over 50 resumes based on this criteria and reported the findings to the committee. As a result of Roback's work, representative from EDWC interviewed several qualified candidates and hired a new Executive Director. At a reception introducing the new Executive Director, Roback was publicly thanked in front of county business executives and community leaders.

# SYSTEMS THINKING

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## SUCCESS STORY

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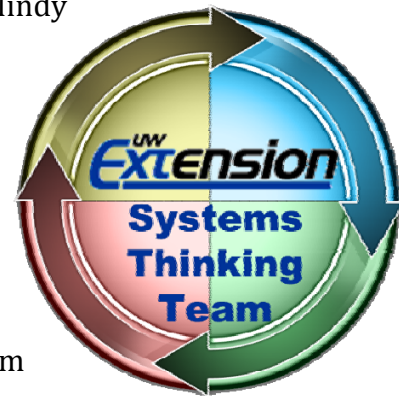
### SYSTEMS THINKING TEAM- TOOLS FOR TURBULENT TIMES

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**Situation-** The leaders, groups and communities, which UW-Extension serves, are often frustrated by a world of increasingly complex issues requiring multiple creative responses. Those responses can be considered more effectively if the complexity, interdependence, uncertainty and creativity available in turbulent times can be embraced. Concepts and tools associated with systems thinking (ST) can be applied effectively in many situations without large budgets and large technical staffs. The understanding of a few concepts and tools permits analysis and diagnosis as well as multiple courses of action to respond to turbulent times.

The Systems Thinking Team (STT) received CNRED Program Special Team Funds to develop a webinar series to make systems thinking concepts and tools accessible to a broad range of extension educators and their community stakeholders.

**Response-** STT members Steve Brachman, Kathleen Haas, Mindy Habecker, Annie Jones, Catherine Neiswender and Paul Roback researched core ST concepts, developed curriculum and taught a four-session educational series entitled “Tools for Turbulent Times.” The first three sessions were taught via webinar and each featured guest presenters. The fourth session utilized an in-person dialogue technique, World Café, during a concurrent breakout session at the 2009 JCEP Conference. The World Café was developed with members of the CNRED Criminal Justice Team and included dialogue with criminal justice stakeholders, including a county social worker, sheriff deputy, non-profit director and judicial court commissioner. Additionally, a WIKI was created for participants to post session presentations and handouts, allow participants to post their homework and allow for on-line discussion.



Specifically, Community Development Educator Paul Roback co-authored the CNRED Special Teams grant application, facilitated meetings of the project team, developed curriculum and co-taught a webinar session entitled “Discovering the Adventure - Systems Thinking Within Your Sphere of Influence.”

**Results-** A total of 172 colleagues and community members participated in the four sessions, which averaged 43 participants per session. Through evaluation, 26% of the 23 responses rated their level of understanding of ST concepts before the program as high or very high. After the program, 83% rated their understanding of ST concepts as high or very

high. One participant commented through evaluation that what they liked best about the series was “having a framework for looking at complicated issues.”

**Evidence-** This series was evaluated at the conclusion of each session. Additionally, a Zoomerang survey was sent to participants approximately two months after the conclusion of the fourth session. The core ST concepts developed and taught through this series were also utilized at a concurrent breakout session at the 2009 National Association of Community Development Extension Professionals Conference and two concurrent breakout sessions at the 2009 Urban Extension Conference. Additionally, the World Café dialogue session on criminal justice resulted in a partnership by the Systems Thinking and Criminal Justice Teams and a successful grant award from the UW-Extension/Colleges Program Innovation Fund. The goals of this project are to define the many hands or partners that work in the criminal justice system, current and potential resources, and important linkages within the system. Additionally, venues for professionals and agencies to dialogue, deliberate, and create sustainable solutions will be created.

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## IMPACT STATEMENTS

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### NATIONAL ASSOCIATION OF COMMUNITY DEVELOPMENT EXTENSION PROFESSIONALS (NACDEP)

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Washington County Community Development Educator Paul Roback co-presented a session on dialogue and deliberation to 30 colleagues at NACDEP’s annual national conference. Workshop participants learned about the variety of methods available for dialogue and deliberation for communities facing complex issues. Additionally, participants were taught how to design, implement and host large-scale dialogue events, like The World Cafe. Roback also provided evaluative information and “lessons learned.”

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### URBAN EXTENSION CONFERENCE

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For the past two years, Washington County Community Development Educator Paul Roback served on the planning committee for this 4-day conference, which over 300 Extension educators from across the country participated. At the conference, Roback co-presented a concurrent breakout session on organizational development theory to 20 participants and co-facilitated a World Café dialogue process for approximately 100 attendees on the theme of organizing Extension for successful urban programming.



Paul Roback & Annie Jones facilitating a World Café Session at the Urban Extension Conference

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## EASTERN & CENTRAL DISTRICT ALL STAFF MEETING

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Washington County Community Development Educator Paul Roback served on a planning committee for an Eastern & Central District All Staff Meeting. Roback facilitated a team of 15 Extension colleagues in the development and implementation of a World Café dialogue process for 150 UW-Extension colleagues in order to begin the conversation about what "Building awareness about our community-based research, education, and outreach scholarship niche" means to UW-Extension. After the meeting, Roback received an e-mail from Tom Schmitz, Central District Director, that stated "thanks Paul... for your work on the café. I have been sharing this with others including the Council for Strategic Change."

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## PROGRAM EDUCATIONAL CONTACTS

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<b>Program</b>	<b>Educational Contact</b>
Organizational Development	599
Local Government & Finance	426
Community & Economic Development	187
Entrepreneurship	93
Systems Thinking	355
<b>Total</b>	<b>1660</b>