

# 2011

## Accomplishment Report



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## ORGANIZATIONAL DEVELOPMENT

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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 the quality of life of county residents, 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.

Since 1976, Washington County has supported the efforts of county non-profits through UW-Extension Washington County. Providing education in organizational development was identified as the highest priority through a 2007 visioning session for the vacant Community Development Educator position. Since starting in Washington County in November 2007, Washington County Community Development Educator Paul Roback has provided organizational development programming to 17 non-government organizations and four government organizations. Roback has measured the short-term outcomes and in some cases the mid-term outcomes from each of the organizations he has worked with. Over time, he intends to measure the long-term outcomes from this programming. The following includes the organizational development work completed this past year.

## SUCCESS STORIES

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### WASHINGTON COUNTY HEALTH DEPARTMENT

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**Situation:** In 2010, the Director of the Washington County Health Department requested that Washington County Community Development Educator Paul Roback facilitate a process to update the Department's five-year strategic plan. The Director wanted the planning process to incorporate preparing the department for a future State Accreditation Process and identify a Quality Improvement Process for the Department to undertake. Additionally, the Director also requested a team-building component to the planning process that would enhance staff understanding of differing perspectives.

**Response:** Through a year-long process, Paul facilitated three meetings with Health Department Staff and one meeting with the Washington County Board of Health. At the first staff meeting, participants reviewed the new State of WI accreditation tool and participated in a Real Colors® Assessment. Paul facilitated a Force Field Analysis to identify factors that contribute to and hinder staff potential for achieving successful prompt and high quality customer service. Additionally, Paul facilitated a nominal group process to gain input on how to organize the department to achieve successful prompt and high quality customer service. At a second session, Paul facilitated a Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis and a dialogue process that allowed participants to work through departmental goals and services. Utilizing information from these two sessions, Paul worked with the Department's Director and Assistant Director to develop a draft strategic plan and a matrix of department programs, funding sources and mandates to use in future decision making.



Paul facilitating a Force Field Analysis

At a third meeting with staff, Paul presented these materials and facilitated a discussion. Staff comments were then incorporated into the planning documents.

**Results:** Paul presented the results of these efforts to the Washington County Board of Health (BOH). Board members provided input on the Department's priorities and the objectives that were identified in the plan. The meeting minutes state that "the Board continued to be supportive of the value of including accreditation in the Strategic Plan." To assist future decision making during the budget process, BOH members reached consensus on utilizing a decision matrix developed as a result of this planning process. Paul incorporated the BOH updates in to the strategic plan, which has been sent to the Health Department Director for implementation.

**Evidence:** Through evaluation of the session with Department staff, 95% of the participants agreed or strongly agreed that identifying helping and hindering forces allowed them an opportunity to discuss the factors that contribute and hinder their potential for achieving successful prompt and high quality customer service. Participants strongly agreed that the Real Colors® Assessment increased their understanding of differing perspectives (a 4.5 on a 5-point Likert Scale). Staff commented that it was "very helpful to have an outside facilitator" and "Paul's assistance working through the goals was very helpful." Through an end-of-year 360-degree evaluation, the Health Department's Assistant Director commented that "Paul is highly diplomatic and was able to keep the staff focused and on task."

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## ECONOMIC DEVELOPMENT WASHINGTON COUNTY

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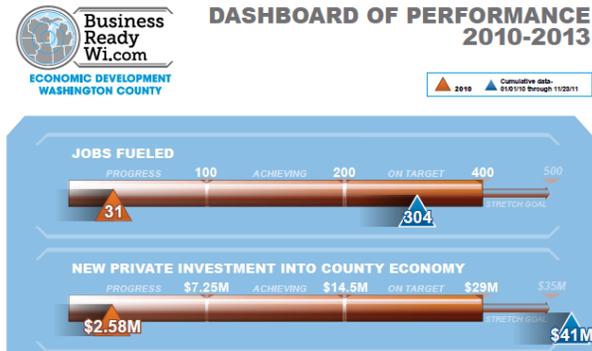
**Situation:** In 2010, Washington County Community Development Educator Paul Roback collaborated with the Executive Director of Economic Development Washington County (EDWC) to facilitate a process that engaged 50+ key community stakeholders in the development of a Next-Level economic development strategy for the County centered on inclusive, adaptive, and system-driven approaches for cultivating a more resilient and diverse local economy. The EDWC Board unanimously approved the Next-Level Strategy and unveiled it at a public event with key community stakeholders in February 2011. In order to ensure the successful implementation of the Strategy, the Executive Director of EDWC requested that Paul assist in the facilitation of a process to design and launch an enhanced organizational structure for EDWC.

**Response:** Paul collaborated with EDWC to: develop committee descriptions, volunteer position descriptions and timelines to launch committees and develop work plans; create a talent matrix with committee chairs that identified desired skill sets required for successful committees and identified potential committee members; establish committee values, responsibilities and ground rules; develop a committee work plan template that included action steps to achieve desired outcomes; and refine draft work plans with committee chairs and EDWC staff. Additionally, Paul collaborated with the Executive Director in a half day workshop to orientate new committee members on the key concepts in the Next-Level Strategy, anticipated outcomes, EDWC's organizational structure and an overview of the committee policies and procedures.

**Results:** Three new committees have been formed and have met regularly for the past 10 months. Each committee has a diverse and talented mix of members, many of which have not previously volunteered with the organization. Committees have developed work plans to achieve the desired outcomes identified in the three-year strategy. The Marketing Committee is nearly ready to reveal

a new brand package and website for the organization. The Toolbox Committee designed a first ever brownfield program for the County and has applied for two USEPA brownfield grants. The Economic Gardening Committee has laid the foundation to design an economic gardening strategy for the county.

**Evidence:** In the first 10 months of implementing the strategy, EDWC has secured \$41 million in new private investment in equipment and real estate. Additionally, 304 new jobs have been created. Both of these measures exceed expected outcomes detailed in the strategy. Through evaluation, the EDWC Executive Director indicated that the talent matrix was effective in attracting individuals with desired technical skills. However, the matrix did not account for soft skills- personalities, passion, meeting preferences and work styles. These are critical for ensuring success. As a result, committee membership will be reviewed and adjusted in early 2012. At the end of the evaluation, the Executive Director commented to Paul, “Thanks so much for helping to make 2011 such a strong year!”



## GUYANA HORTICULTURE PROJECT- BUILDING CAPACITY TO UNDERSTAND AND WORK WITH GROUPS

**Situation:** UW-Extension Community Development Educators Catherine Neiswender and Paul Roback (Volunteers) were invited by Partners of the Americas Farmer to Farmer (FTF) Program to provide training in UW-Extension techniques to staff of agriculture development organizations. The purpose of the trainings was to strengthen the relationship between farming communities and support staff via hands-on activities that develop community development skills, teach group process techniques and establish goals to be implemented immediately. The Volunteers were to train two recently hired FTF Field Officers and a representative from each of three collaborating organizations for a total of five individuals (Participants).

**Response:** To meet the needs of strengthening working relationships with farmer groups, Volunteers developed a two week-long training to build participants skills and put them to practice in the classroom and the field. The overall purpose of training was to build the capacity of Participants on understanding and working with groups. The training was designed to be flexible enough to provide tailored training on topics of relevance and interest to the participants. Overall objectives included: Participants will learn concepts and skills related to understanding, diagnosing and facilitating groups, group discussions, and decision-making; Volunteers will create an environment that enables participants to learn from each other and share experiences on working with groups and individuals; and Participants will be able to practice tools and techniques learned.



Paul & Catherine with program participants

**Results:** Through a needs assessment process that included Participants self-evaluating their skill sets, the Volunteers designed and implemented training on fourteen topics. Some of these topics included conducting needs assessments, decision making, nominal group process techniques, managing discussions, adult learning techniques, systems thinking and strategic planning. Throughout the training, the Volunteers taught by using a variety of adult learning techniques, including lectures, small group discussions, visual graphics/pictures, small group activities, ice breakers, hands-on exercises and real-world scenario role playing.

The second week of the training consisted of a number of field visits to project sites. Participants selected individual farmers and groups that they have been working with that they would like to conduct needs assessments with. Participants facilitated discussions utilizing a variety of skills and techniques learned in the first week of training. The Volunteers observed the interactions and when necessary, provided coaching.



Examining "spots" on leaf lettuce that were identified during a SWOT Analysis facilitated by Participants

**Evidence:** Through evaluation, all Participants reported knowledge gained in six assessed areas. All Participants indicated they would use the skills they learned during the training in both professional and personal settings. Participants also indicated that skills would be valuable for working both with groups and with individuals. The classroom experience was rated Very Valuable by 60% of the Participants and the field experience was rated Very Valuable by 80% of the Participants. Comments indicated that the combination of class and field experiences enhanced the learning experience because participants were able to not only learn the skills, but then put them



Graduation Day!

into practice. The instructors were rated Very Effective by 80% of the Participants. Comments indicated that the instructors were very effective in how they taught and demonstrated the skills, and that they provided a comfortable environment for the participants to learn and become confident in using the skills. One Participant commented that "the trainers showed us how to understand group dynamics and facilitate group discussions" and another commented that "the trainers were very effective in the practical demonstration of the various facilitation tools."

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## IMPACT STATEMENTS

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### FAMILY PROMISE

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Family Promise of Washington County is a community response to the emerging rise of homelessness and poverty in Washington County. This response includes coordinating an emergency shelter for homeless families and operating a day center that assists guests in finding employment and housing. After opening in October 2010, members of the Family Promise Board requested that Washington County Community Development Educator Paul Roback facilitate a process to identify organizational goals.

Paul facilitated a strategic planning session that identified core values for the organization; updated the organization's mission statement; created a vision statement; identified organizational strengths, weaknesses, opportunities and threats; and brainstormed goals. Participants evaluated Paul's facilitation as excellent (4.9 on a 5-point Likert Scale). Additionally, one participant commented "Very well done. Good use of the 4 hour time frame. Kept the group focused and on task. Good input and insight." After the session, committees developed action plans. Paul incorporated these into the strategic plan report, which was unanimously adopted by the Board.

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### HARTFORD BUSINESS IMPROVEMENT DISTRICT (BID)

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The purpose of the Hartford Business Improvement District (BID) is to promote the orderly development of the City of Hartford by providing an organization and funding vehicle to develop and promote the downtown area for the economic benefit of all businesses and property owners within the District. The president of the BID contacted Washington County Community Development Educator Paul Roback and requested strategic planning facilitation.

Paul facilitated two strategic planning sessions that created the BID's first mission and vision statements; identified organizational Strengths, Weaknesses, Opportunities and Threats; identified and prioritized goals for the BID Board to accomplish over the next two years; created a revised organizational structure; and developed action plans to achieve goals.

Participants strongly agreed (5 on a 5-point Likert Scale) that the process of identifying goals increased their ability to identify issues for the organization to work on. Participants strongly agreed (4.7) that creating a mission statement helped clearly define the role of their organization and that creating a vision statement (4.6) helped clearly define the direction of the organization. Additionally, participants strongly agreed (4.7) that the process of prioritizing goals increased their ability to set priorities. One participant commented on Paul's facilitation by saying "You are very organized and focused but always so respectful. I never felt like you were running or controlling the process. You were facilitating – very good job."

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### WASHINGTON COUNTY AGING & DISABILITY RESOURCE CENTER (ADRC)

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In order to prepare for the changing needs of county residents, the Washington County Aging & Disability Resource Center (ADRC) Director requested Washington County Community Development Educator Paul Roback to facilitate two strategic priority setting sessions with the ADRC Board. At the first session, Paul presented demographic data on the aging population in the county and facilitated a discussion on the external forces that are impacting the ADRC. The director presented the department's annual report and performance measurement outcomes.

At the second session, Paul facilitated a discussion on the emerging issues ADRC needs to prepare for and the core functions of the department that should be preserved. Through evaluation, all participants agreed or strongly agreed that the sessions assisted in achieving agreement on which programs should receive levy support priority. Participants evaluated Paul's facilitation as excellent (5.0 on a 5-point Likert Scale) and one commented that Paul "kept session flowing smoothly- did not interject any personal opinion or bias." Paul compiled a report that will be used to guide discussions during ADRC's budget process.

## AGRICULTURE INDUSTRIAL SOCIETY

The Washington County Agricultural & Industrial Society (AIS) is a non-profit organization that oversees the operations and management of the Washington County Fair Park and the County Fair. The Executive Director of AIS contacted Washington County Community Development Educator Paul Roback to facilitate a strategic planning process for the board. The organization's last strategic plan was completed in 2004. Since that time, the organization has hired a new Executive Director and developed a new lease agreement with the County. In order to address these changes and ensure the future success of AIS, Paul facilitated two strategic planning sessions. As a result, board members discussed organizational name and purpose, reaffirmed their mission, created a vision, identified goals and developed action plans to ensure that they will achieve their goals. Participants agreed that creating action plans increased their ability to focus goals into future actions (4.4 on a 5-point Likert Scale). At the conclusion, one participant commented that "the entire process was very helpful, positive, and interesting. Thank you." Paul completed a strategic plan report, which was unanimously adopted by the AIS Board.

## WEST BEND FRIENDS OF SCULPTURES

The West Bend Friends of Sculptures (WBFS) is a local non-profit that enhances quality of life by adding an artistic dimension to the City of West Bend's identity. Since 1992, WBSF has established over 30 sculptures in the City. WBSF's executive director contacted Washington County Community Development Educator Paul Roback to facilitate a strategic planning process for the WBFS board. Paul facilitated two sessions that reviewed the organizations structure and by-laws; identified key strategic issues; and developed strategies to address these issues. Participants agreed (4.4 on a 5-point Likert Scale) that discussing key strategic issues helped to clarify their direction as an organization. They also agreed that the sessions identified next steps for their organization to accomplish over the next 12-18 months (4.3 on a 5-point Likert Scale).

One participant commented on Paul's facilitation by stating "great job on keeping on track and pairing together like topics." Another commented "Tough group to work with. Paul did a great job."



## ALLENTON AREA ADVANCEMENT ASSOCIATION

The purpose of the Allenton Area Advancement Association (AAAA) is to promote community advancement through building relationships between local residents, business leaders, the professional community, the agricultural community, local government, and other area communities. The Association President contacted Washington County Community Development Educator Paul Roback to facilitate a process for the organization to set future priorities. In order to identify organizational strengths and opportunities, Paul developed and implemented a survey to association members and key community stakeholders. Survey results identified several opportunities for AAAA to strengthen their organization and several future community projects for

the Association to undertake. Results were discussed with the Board and used in revising the Association's mission statement. Participants strongly agreed (4.9 on a 5-point Likert Scale) that discussing the purpose and mission helped generate consensus on the organization's core function. Paul also proposed by-law revisions, which had not been updated in over 20 years and required significant revisions to reflect current practices of the association. Additionally, Paul created the Association's first organizational chart, which will assist the organization in achieving their goals.

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### VOLUNTEER CENTER OF WASHINGTON COUNTY

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The Volunteer Center (VC) of Washington County connects volunteers and resources with community partners to improve quality of life. Washington County Community Development Educator Paul Roback facilitated a strategic planning process for the VC in 2009, which was implemented. The Executive Director contacted Paul to update the plan and focus on seven strategic issues identified by the board's committees. Paul facilitated four sessions with the VC Board that reviewed formal mandates; brainstormed informal mandates; reached consensus on a revised organizational purpose and mission statement; and identified objectives for each strategic priority. Participants strongly agreed (4.6 on a 5-point Likert scale) that the sessions allowed them the opportunity to share their thoughts and opinions. A participant commented that Paul "kept us moving without taking away critical time for pondering." VC committees will utilize this information to develop action plans in early 2012.

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### FAMILY CENTER OF WASHINGTON COUNTY

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Through education and support programs, the Family Center of Washington County (FC) provides resources to parents and caregivers to care for and raise children. Due to a decrease in federal funds, the United Way requested that the FC contact Washington County Community Development Educator Paul Roback to complete a strategic plan. Paul suggested that prior to undertaking a strategic planning process, the FC should first focus their attention on fund development.

As a result, Paul facilitated a 3-hour strategic priority session that focused on five specific priorities to strengthen the organization's funding. Through facilitated dialogue, participants reached consensus on several items and developed action plans that assigned tasks and timelines to achieve identified priorities. Participants strongly agreed that discussing strategic issues helped to clarify their direction as an organization (4.9 on a 5-point Likert Scale). One participant commented that they "loved how we had to develop actual action steps around our next 'adventures'." It is anticipated that once the FC is more financially secure, they will contact Paul for strategic planning facilitation.

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### ENCHANTMENT IN THE PARK

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Due to the increased demand at local food pantries, the four Rotary Clubs in Washington County collaborated in 2009 to implement Enchantment in the Park, an outdoor Holiday Light Show which has collected almost 50,000 non-perishable food items in each of the past two years. In order to ensure the long-term success of Enchantment, steering committee members initiated a process to develop a 501(c)3 for fundraising and long-range planning. The committee chair requested Washington County Community Development Educator Paul Roback provide resources to assist

this process. Paul facilitated the development of an organizational purpose, structure and by-laws. Each of these is required as part of the application for 501(c)3 status through the WI Department of Financial Services. As a result of this process, the organization worked with a local CPA and filed the necessary paperwork to form a 501(c)3.

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## COMMUNITY & ECONOMIC DEVELOPMENT PREPAREDNESS

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Traditionally, the Washington County Community Development Educator position has not provided economic development programming. However, the impact of the recession has resulted in the City of West Bend (county seat) having one of the highest unemployment rates in the state over the past several years. Due to on-going effects of the recession, Roback received approval from the county Extension oversight committee to provide appropriate university-based programming in community economic development. In 2011, the primary focus was the continued organizational development work with Economic Development Washington County (see success story in organizational development section). Additionally, Roback continues to collaborate with the UW-Milwaukee Small Business Development Center in providing entrepreneurship resources in Washington County.

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## IMPACT STATEMENT

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### FIRST STEPS TO STARTING A BUSINESS

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Through a collaboration with the UW-Milwaukee Small Business Development Center, Washington County Community Development Educator Paul Roback offered two First Steps to Starting a Business Workshops. Through the two workshops, 23 participants have gained knowledge on the essential tools and techniques for entrepreneurs to assess their readiness, improve their business ideas, and avoid common mistakes. Additionally, participants received a list of business assistance resources and community contacts to assist in the successful launch of their business ideas.

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## EDUCATIONAL CONTACTS

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<b>Direct Educational Contacts</b>	
Community & Economic Development Preparedness	44
Local Government Education	11
Organizational Development	795
Other Programs	
<b>Total</b>	<b>850</b>
<b>Indirect Educational Contacts</b>	
Local Government E-Newsletter	118
Economic Indicator E-Newsletter	916
<b>Total</b>	<b>1,034</b>