

2012

Accomplishment Report



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ORGANIZATIONAL DEVELOPMENT

SUCCESS STORIES

WASHINGTON COUNTY NON-PROFIT FISCAL HEALTH SURVEY

Situation: The effects of the “Great Recession” are still felt in many households, businesses and governments throughout Washington County. Additionally, the effects have also been felt in the nonprofit sector, where needs for services has increased and revenues have remained flat. Many of these non-profits provide vital services that enhance the quality of life in the County, 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.

Response: To determine the financial health, trends and concerns of nonprofits in Washington County, UW-Extension Community Development Educator Paul Roback collaborated with representatives from UW-Washington County, United Way of Washington County and the Volunteer Center of Washington County. Together, this coalition researched, designed and implemented a survey of a cross-section of nonprofit organizations in Washington County.

The survey was distributed electronically to 91 nonprofit organizations within the county and 28 responses were received for a response rate of 30.8%. Responses were held in confidence and the data results were in aggregate of those who responded.

Results: Although 95% of the nonprofits are confident that they would be able to meet the demand for services in 2012, their ability to meet future demands may be limited by other findings in this survey. These include: 67% indicated demand for services increased from 2010-2011; 53% have not changed staffing levels from 2011; 59% indicated total expenses increased from 2010-2011; 43% have been financial healthy to date, but feel vulnerable in the future; 43% had expenses exceed revenues in 2011; 29% have three or less months of reserves on hand for operating expenses; and 50% have increased their fundraising goal from the previous year.

Additionally, organizations indicated that their greatest challenges are obtaining funds and recruiting new donors; enhancing their visibility and reputation; and managing workloads. Sixteen nonprofits responded with their annual fund development goal for the current fiscal year, which was over \$3.7 million.

Evidence: Representatives from 33 non-profit organizations attended a forum where survey results and county demographic changes were presented. Roback facilitated a dialogue process with forum participants that identified potential strategies to move forward with. These discussions suggested that more collaboration is needed amongst the non-profit sector in Washington County and nonprofits need to seek out new and diversified funding sources to sustain and grow services to meet demands. Participants evaluated the content of the forum as excellent (4.5 on a 5-point Likert Scale), the quality of the materials presented as excellent (4.5) and the practical value as excellent (4.4).

In order to assist the development of successful collaborations, the coalition has designed a forum for January 2013 entitled “Power of Collaboration- Coming Together for Greater Impact.” As of four weeks prior to the forum, representatives from 27 organizations are registered. Additionally, it is intended that this survey be conducted on an annual basis to identify trends in the financial health of nonprofit respondents within Washington County.

FAMILY CENTER OF WASHINGTON COUNTY

Situation:

Through education and support programs, the Family Center of Washington County provides resources to parents and caregivers to care for and raise children. Due to a decrease in federal funds and the hiring of a new Executive Director, the United Way requested that the Family Center contact UW-Extension Washington County Community Development Educator Paul Roback to complete a strategic planning process. Roback met with the Executive Director and Board President of the Family Center to design a planning process to address the challenges the organization was facing.

Response:

As a result of a needs assessment process and the use of an Organizational Assessment Tool (OAT), Roback suggested that the Family Center should first focus their attention on fund development prior to initiating a more in depth planning process. Over the course of a year, Roback facilitated three sessions with the board of the Family Center. Due to organizational changes in funding and leadership, each session was designed to accommodate the organization’s current needs. A traditional strategic planning process and timeline was adapted to meet these evolving needs.

Results:

During the first session, Roback reported organizational strengths and opportunities identified through the OAT, reviewed the organization’s mission statement and facilitated a dialogue process focused on five specific priorities to strengthen the organization’s funding. During the second session, Roback facilitated a process to develop a vision statement and a dialogue process to develop action plans for four strategic issues- programming, funding, marketing and organizational structure. During a third session, Roback presented a demographic overview of the county to increase understanding of how the county is changing and the needs the organization can potentially address. This session also affirmed organizational mission and vision, identified goals and developed action steps to accomplish goals. Additionally, a strategy was created to expand board membership.

Evidence:

At the first session, 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’.”

At the second session, participants strongly agreed that working on their mission statement helped clarify their role as an organization (4.7) and that developing a vision statement helped to define their direction as an organization (4.7). One participant commented “Great session – conversation was constructive and provided great footing for a transitioning board.” Another commented that “these sessions have been extremely valuable to me as a board member.”

At the third session, participants strongly agreed that the census presentation provided an overview of demographic changes in the county (4.8). Additionally, participants strongly agreed that the process of identifying and prioritizing goals increased their ability to identify issues and set priorities (4.8). Overall, participants evaluated Roback’s facilitation as excellent (4.8).

In the future, the Board would like Roback to facilitate a process to identify long-range goals for the organization. This is a great indication that the organization has worked through immediate and challenging issues and is now better prepared to be proactive in ensuring their long-term success.

IMPACT STATEMENTS

ALLENTON AREA ADVANCEMENT ASSOCIATION

The Allenton Area Advancement Association (AAAA) unanimously approved the revised by-laws that UW-Extension Washington County Community Development Educator Paul Roback drafted for the organization. It had been 20 years since they were last revised and numerous changes were needed to reflect current practices of the Board and to ensure compliance with the State. Roback worked with the AAAA Board and membership over several months to ensure that the revised by-laws reflected the needs of the organization and set a framework for future success.

ALLENTON VOLUNTEER FIRE DEPARTMENT

The Chief of the Allenton Volunteer Fire Department contacted Educator Roback to facilitate a process to allow members to provide feedback on two strategic issues. Roback facilitated a three-hour dialogue process with 35 volunteer firefighters that allowed members the opportunity to discuss the strategic issues of staffing and training. This was an idea generating session that the Board will utilize to develop an appropriate course of action. Through evaluation, one participant commented that the process “helped get ideas out for us” and another stated that Roback “did have control of group – Good job!”

CITY OF WEST BEND’S ECONOMIC & COMMUNITY DEVELOPMENT DEPARTMENT

The new Director of the City of West Bend’s Economic & Community Development Department contacted Educator Roback to facilitate a process that would develop mission and vision statements for the newly revamped department, which was a merger of staff and functions of several previous departments.

Roback facilitated a process that developed a draft mission statement, several alternate vision statements and identified department strengths, weaknesses, opportunities and challenges. Through evaluation, participants agreed that drafting a mission statement helped clearly define their role as a department (3.8 on a 5-point Likert scale) and that creating a vision statement helped clearly define their direction as a department (3.7). One participant commented that “This was very beneficial in terms of hearing each employee’s perspective.” Overall, participants evaluated Roback’s facilitation as excellent (4.6) and one commented “Good established process and exhibited strong interpersonal skills.” Department staff finalized the mission and vision statements, which were posted on the City’s website and incorporated into a final report Roback developed.

INTERFAITH CAREGIVERS OF WASHINGTON COUNTY

Educator Roback facilitated two sessions with the Interfaith Caregivers of Washington County board that identified and addressed key strategic issues affecting the organization. Interfaith connects a network of volunteers who provide assistance to help maintain the independence of older adults.

Through this process, participants completed a board assessment tool, reviewed and updated the organization's mission statement, created a vision statement, prioritized key strategic issues and developed action plans. Participants strongly agreed that discussing strategic issues helped to clarify the direction of the organization (5.0 on a 5-point Likert Scale) and that creating action plans increased their ability to focus goals into future actions (5.0). Overall, participants evaluated Roback's facilitation as excellent (5.0) and one commented that "You are terrific at this! Thank you so very much for sharing your time and expertise with us."

UNITED WAY OF WASHINGTON COUNTY

Educator Roback was asked by the United Way of Washington County to facilitate a strategic planning session. Twenty-six board members and staff participated in a process that increased their understanding of internal & external trends impacting the United Way (4.1 on a 5-point Likert scale); gained knowledge on the United Way Community Impact Model (4.6); and identified and prioritized organizational goals (4.4). Overall, participants evaluated Roback's facilitation as excellent (4.5) and one commented that "Paul does an excellent job in clarifying issues and keeping us moving forward."

VOLUNTEER CENTER OF WASHINGTON COUNTY

Over five months, Educator Roback facilitated a strategic planning process for the Volunteer Center of Washington County. The Volunteer Center supports member agencies and the community by: strengthening and championing volunteerism; maximizing the time and talents of volunteers; and delivering vital/critical resources. Through evaluation, board members agreed (4.2 on a 5-point Likert scale) that discussing strategic issues provided the framework for prioritizing goals, strongly agreed (4.8) that creating action plans increased their ability to focus goals into future actions, and 100% indicated that the action plans developed were achievable for the organization. Participants evaluated Roback's facilitation of the planning process as excellent (4.6) and one board member commented on Roback's performance by saying that "You always do a good job."

WASHINGTON COUNTY STRATEGY SESSION

Educator Roback presented county demographic data and facilitated a process to identify Strengths, Weaknesses, Opportunities and Challenges (SWOC) with the Washington County Executive Committee, Liaison Committee Chairs and several Department Heads. The output from this process will be utilized during a session in January 2013 that will identify key issues and goals for the county to address over the next three years. A staff member from UW-Washington County will facilitate this second session.

The seventeen participants strongly agreed that the census presentation provided an overview of demographic changes in the county (4.6 on a 5-point Likert Scale). Additionally, participants agreed that the SWOC process assisted in the identification of internal strengths & weaknesses and

external opportunities & threats (4.4). Overall, participants evaluated Roback’s facilitation as excellent (4.8). A participant commented that “Paul did a wonderful job in leading the discussion and not giving his views.” Another commented that the session was “very productive; good ideas.”

WASHINGTON COUNTY HISTORICAL SOCIETY

The Washington County Historical Society operates four distinct museums and oversees over 30,000 artifacts that preserve the history of Washington County. The Society’s director contacted Educator Roback to facilitate a meeting with the Society Board to identify and address strategic issues. Prior to the meeting, Paul utilized an organizational assessment survey with the board to identify strengths and opportunities. During the planning session, Roback facilitated a discussion of the organization’s mission statement and a process to identify strategic issues. Additionally, Board members prioritized these issues and identified implementation strategies. Participants strongly agreed that discussing strategic issues helped to clarify their direction as an organization (4.5 on a 5-point Likert Scale). One participant commented that Roback’s facilitation “made it look doable and possible, not overwhelming.”

COMMUNITY & ECONOMIC DEVELOPMENT

IMPACT STATEMENTS

FIRST STEPS TO STARTING A BUSINESS WORKSHOP

Through a collaboration with the UW-Milwaukee Small Business Development Center, Washington County Community Development Educator Paul Roback offered one First Steps to Starting a Business Workshop. Through this workshop, 5 participants gained knowledge on the essential tools and techniques for entrepreneurs to assess their readiness, improve their business ideas, and avoid common mistakes. Additionally, Roback provided participants with a list of business assistance resources and community contacts to assist in the successful launch of their business ideas.

WASHINGTON COUNTY WORKFORCE PROFILE

The Wisconsin Department of Workforce Development Office of Economic Advisors compiled the Washington County Workforce Profile, which also included information on the impact of the “Great Recession” on the State and Country. Recognizing that few community members would have the time to read the full profile, Educator Roback reviewed the report and developed a summary of relevant information related to Washington County. This summary included information on industry changes, employment trends, average annual wages, per capita personal incomes, workforce commuting, poverty and population growth. This summary and a link to the full Profile was sent to 55 stakeholders in Washington County, including elected officials, chamber of commerce directors, non-profit directors, economic development officials and others.

Comments that Roback received in response include; “Paul- this is such valuable information. Thank you!” “Excellent report and data analysis– thank you Paul.” “Great info! Thanks for sharing.” Also, one organization forwarded the information to additional stakeholders in the City of Hartford.

WASHINGTON COUNTY WORKFORCE RETIREMENT SURVEY

Educator Roback presented to 35 participants at an Economic Development Washington County (EDWC) event that shared the results of a countywide retirement and departure intentions study of area businesses. Roback's presentation focused on census information regarding Wisconsin's changing demographics related to workforce quantity and the expected workforce shortage. Additionally, Roback facilitated a discussion with participants on next step priorities that are necessary to address the workforce quality and quantity issues in Washington County. Participants evaluated Roback's presentation on workforce demographics and migration as good (a 3.4 on a 5-point Likert Scale).

EDUCATIONAL CONTACTS

Direct Educational Contacts	
Community & Economic Development Preparedness	109
Local Government Education	303
Organizational Development	427
Other Programs	112
Total	951
Indirect Educational Contacts	
Economic Indicator E-Newsletters	973
Local Government E-Newsletters	60
Non-Profit E-Newsletters	29
West Bend Daily News Articles	17,600
Total	18,662