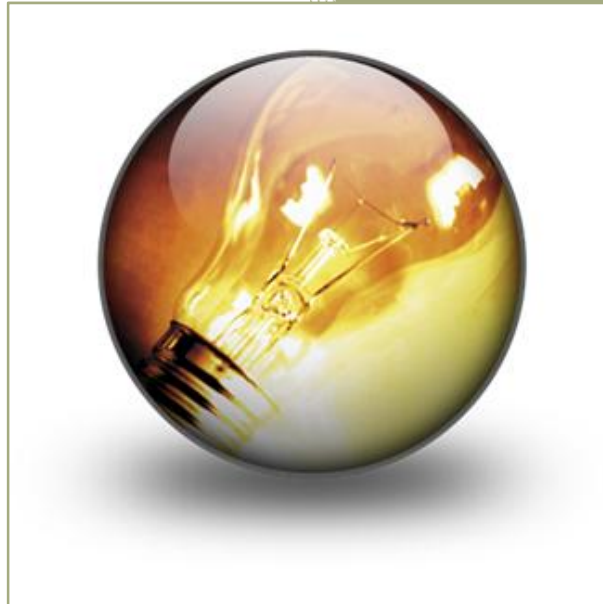


2013

Accomplishment Report



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ORGANIZATIONAL DEVELOPMENT

SUCCESS STORIES

EDUCATIONAL RESPONSE TO NONPROFITS AND THE ECONOMY SURVEY

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 two nonprofit workshops in 2013.

The first was entitled “The Power of Collaboration: Coming Together for Greater Impact.” Fifty-three attended the forum, representing 42 organizations, and featured a panel moderated by Community Development Educator Paul Roback. Panelists included representatives from the West Bend Mutual Charitable Fund, the Greater Milwaukee Foundation and the United Way of Washington County. Each panelist discussed how their organization views collaborations for grant funding, why they encourage it and how it factors into the application process. During the workshop, structured networking facilitated Paul Roback provided participants the opportunity to identify and meet with potential collaborators. Participants shared their organization’s mission, goals, clientele and initiatives for the upcoming year.

The second workshop was entitled “Planned Giving” and featured a panel discussion moderated by Paul Roback. Panelists included the Senior Planned Giving Director at Children's Hospital Foundation, who is also a Board Member of the Partnership for Philanthropic Planning

of Eastern Wisconsin; an attorney at Schloemer Law Firm, whose area of concentration includes estate and succession planning; and the Past President of Friends of Lac Lawrann Conservancy and founder of the Maurin Society, consisting of all who have named Friends of Lac Lawrann in their estate plan. Twenty attended this workshop, representing seventeen organizations.

Results: Prior to the first workshop, 37% of the participants indicated that they had a good or very good understanding of grant funders views on collaboration. After the workshop, this increased to 87%. Prior to the workshop, 34% of the participants indicated that they had a good or very good understanding of how to identify potential collaborators. After the workshop, this increased to 84%. Overall, participants evaluated the content of the workshop as excellent (4.6 on a 5-point Likert Scale).

Prior to the second workshop, 34% of the participants indicated through evaluation that they had a good or very good understanding of the components of a planned giving policy. After the forum, this increased to 67%. Prior to the workshop, 34% indicated that they had a good or very good understanding of the legal considerations for planned giving. After the workshop, this increased to 50%. Prior to the workshop, 42% indicated that they had a good or very good understanding of implementing a planned giving program. After the workshop, this increased to 67%. Overall, participants evaluated the content of the workshop as excellent (4.6 on a 5-point Likert Scale)

Evidence: At the conclusion of the first workshop, 31 participants committed to contacting a potential collaborator. Three months after the workshop, a survey was sent to these participants to determine if they had pursued a collaboration since the workshop. Of the 16 responses received, 12 indicated that they have initiated a collaboration and several indicated that they have initiated multiple collaborations as a result of the workshop.

As part of the evaluation for the second workshop, participants were asked what they plan on doing in the next three months to apply what they have learned. One participant responded that they plan to “speak with committee about re-designing ‘requirements’ for legacy society; have conversations with potential donors; marketing.” Another participant responded that they will “make this part of fund development plan, include on Facebook/website/newsletters and after 3 months, meet with some of our loyal donors.” A third responded that they will “create a plan for nurturing donors and making people more aware of option for giving.” A fourth participant responded that they will “talk to Executive Director about today’s program to implement some suggestions that were presented.

ORGANIZATIONAL DEVELOPMENT- STRENGTHENING AREA NONPROFITS

Situation: In 2012, there were over 500 nonprofit 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. However, nonprofits often lack the knowledge and capacity to focus on their mission and use limited resources strategically. Providing education in organizational development was identified as the highest priority through a 2007 visioning session for the vacant Community Development Educator position.

Response: Since starting in Washington County in November 2007, Washington County Community Development Educator Paul Roback has provided organizational development programming to twenty-seven nonprofit organizations and seven government organizations. In 2013, Paul provided one-on-one organizational development programming to 15 organizations, including Family Promise, Musical Masquers, Healthy People Project, Big Brothers Big Sisters, Casa Guadalupe Education Center, Criminal Justice Collaborating Council, Mid-Moraine Municipal Association, Economic Development Washington County, The Youth and Family Project, Cedarburg Artist Guild, Washington County Campus Foundation at UW-Washington County, Volunteer Center, Friends of Abused Families, the 4-H Horse & Pony Project, and the Executive Committee of the Washington County Board.

Each facilitated process starts with a preplanning meeting between Paul and leadership from the organization. Through an organizational assessment, a process is designed to accommodate each organization's particular needs and goals. Each process varies in length and type of activities utilized during the facilitated sessions.

Results: Evaluation is conducted during and at the conclusion of facilitation with each organization. Each evaluation is tailored to the specific process designed. As part of an environmental scan with six organizations, they agreed (avg. 4.5 on a 5-point Likert Scale) that the census presentation provided an overview of the demographic changes in Washington County. An organizational assessment tool was used with five organizations, who agreed (4.4) that the tool was helpful in identifying strengths and opportunities related to how the board was functioning. A Force Field Analysis was utilized with six organizations, who strongly agreed (4.6) that the analysis assisted in identifying organizational strengths, weaknesses, opportunities and challenges. Goal identification and prioritization was used with five organizations, who strongly agreed (4.7) that the process increased their ability to identify issues and set priorities. A facilitated discussion of strategic issues was used with four organizations, who agreed (4.4) that the process helped clarify their direction as an organization. Action plans were developed with four organizations, who agreed (4.3) that it helped to increase their ability to focus goals into future actions. Overall, the fifteen organizations evaluated Paul's facilitation as excellent (4.7).

Evidence: Qualitative data was collected as part of the evaluation process to measure how participants will utilize the knowledge gained during the strategic planning process. A participant from the Washington County Campus Foundation commented "the process has helped the board grow as a team and better understand what their goals and focus should be." A participant from The Youth and Family Project commented that "the process has and will

enhance and strengthen the organization, guide the direction of the agency.” Participants from the Criminal Justice Collaborating Council commented that they will “follow up with goals,” “continue with commitment,” and “continue working on committee objectives.”

MEASURING IMPACT

The following is a more detailed narrative for each organization that received organizational development programming in 2013.

FAMILY PROMISE OF WASHINGTON COUNTY

Family Promise of Washington County is a community response to the issue of homelessness in Washington County. Through a network of area congregations, they provide overnight lodging, meals, and hospitality to homeless families with children. The Board President and



Executive Director of Family Promise contacted Paul to facilitate a strategic planning process for the organization, which included an organizational assessment tool to identify strengths and opportunities for the organization. Additionally, Paul presented census data to provide an overview of the demographic changes in Washington County. Lastly, Paul facilitated a discussion with the board on four strategic issues impacting the organization’s future direction.

The eleven participants agreed that the census presentation provided an overview of demographic changes in the county (4.3 on a 5-point Likert Scale). Additionally, participants strongly agreed that discussing strategic issues helped to clarify their direction as an organization (4.5). Overall, participants evaluated Paul’s facilitation as excellent (4.6).

WASHINGTON COUNTY EXECUTIVE COMMITTEE

Paul 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 was utilized during a session on January 22nd that identified key issues and goals for the county to address over the next three years. Dan Anhalt, from UW-Washington County, facilitated 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 Paul’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.”

MUSICAL MASQUERS

In his Community Development Educator role, Paul facilitated two sessions with the board of Musical Masquers, West Bend’s community theater organization for over 50 years. Through this facilitation, participants strongly agreed (4.7 on a 5-point Likert Scale) that the process of identifying goals increased their ability to identify issues and set priorities. Overall, participants evaluated Paul’s facilitation as excellent (4.9). Additionally, a participant commented “Excellent job! You kept a very good balance between listening to us and jumping in to clarify what some of the issues are.”

HEALTHY PEOPLE PROJECT OF WASHINGTON COUNTY

Paul facilitated a process that updated the strategic plan for the Healthy People Project of Washington County, which is a coalition with representatives from businesses, non-profits and community organizations. The coalition promotes healthy living in Washington County communities by serving as a catalyst for building collaborations that improve community health.



As part of this process, participants created a new vision statement for the organization, identified key stakeholders and updated organizational strengths, weaknesses, opportunities and challenges. Additionally, participants discussed strategic priorities and identified actions steps to accomplish organizational goals.

Participants strongly agreed that discussing strategic priorities helped identify actions to accomplish (4.9 on a 5-point Likert Scale) and rated Paul’s facilitation as excellent (5.0). Participants commented: “Thank you Paul for your assistance and expertise. You leading our group is always helpful.” “Always good at keeping us on track, tactfully!” “Great job! Good listening, questions and summarizing.”

BIG BROTHERS BIG SISTERS OF WASHINGTON COUNTY

The Executive Director of **Big Brother Big Sisters** (BBBS) contacted Paul to facilitate a strategic planning session with the organization’s board. BBBS helps boys and girls in Washington County reach their full potential through one-to-one mentoring relationships with volunteer adults.

Paul facilitated a four-hour planning process that reviewed the results of an organizational assessment tool, facilitated a discussion on mission and vision, provided an overview of key demographic changes in the county over the past decade, and identified strengths, weaknesses, opportunities and challenges. Additionally, Paul facilitated a discussion of key strategic issues facing the organization and developed action steps to accomplish goals.

Through evaluation, participants agreed (4.4 on a 5-point Likert Scale) that discussion strategic issues helped to clarify their direction as an organization. Additionally, participants evaluated Paul's facilitation as good (4.4). Comments included "excellent job keeping things on track" and "very good. It was very helpful to have an outside facilitator."

CASA GUADALUPE EDUCATION CENTER

Paul facilitated strategic planning sessions with the Board of Casa Guadalupe Education Center, whose mission is "to be the Bridge of Integration to Hispanics and to the Communities in which they live through Education."

Participants strongly agreed (4.6 on a 5-point Likert Scale) that Paul's census presentation provided an overview of the demographic changes in Washington County and the organizational assessment tool was helpful in identifying strengths and opportunities related to how the board is functioning (4.6). Additionally,



participants strongly agreed (4.9) that the process increased their ability to identify issues and set priorities. Participants evaluated Paul's facilitation as excellent (4.8). One participant commented that Paul was a "great facilitator, motivated the team, asked thoughtful and provoking questions to yield great conversation, and was focused." Another commented that Paul was "very helpful in encouraging discussion, but also moving the conversation along efficiently."

CRIMINAL JUSTICE COLLABORATING COUNCIL

The Ozaukee County Criminal Justice Collaborating Council (CJCC) improves community safety in Ozaukee County by reducing recidivism, with a primary focus on drug and alcohol related incidences. Due to a Community Development Educator position vacancy in Ozaukee County, the UW-Extension Department Head requested that Paul facilitate a strategic planning retreat for the CJCC. Paul facilitated a process for the eighteen participants that identified organizational accomplishments, set strategic priorities and developed action steps to move forward with. Participants evaluated Paul's facilitation as excellent (4.8 on a 5-point Likert Scale). Additionally, one participant commented that Paul did a "great job of keeping us on track- good flow form one area to the next."

MID-MORAINES MUNICIPAL ASSOCIATION

The Mid-Moraine Municipal Association is an organization of incorporated municipalities in Ozaukee and Washington Counties working towards municipal improvement. The organization's Executive Director requested that Paul facilitate a process to assist the association's Legislative Committee identify legislative priorities to communicate to State elected officials. Through a nominal group process, fifteen participants identified 26 priorities, which were then prioritized to six key areas to address with State representatives. Through evaluation, participants strongly agreed that the process used to identify legislative priorities was very helpful (4.8 on a 5-point Likert scale). Participants also evaluated Paul's facilitation as very helpful (4.8) and one participant commented that "Paul always does a great job. He keeps the discussion focused on the task and keeps achievable goals."

ECONOMIC DEVELOPMENT WASHINGTON COUNTY

Christian Tscheschlok, Executive Director of Economic Development Washington County (EDWC), contacted Paul to facilitate a process with the Board's newly formed Governance Restructuring Committee to identify a strategy that would optimize talents across their organization; enhance communication and connectivity among the Board, committees and staff; and develop Board member engagement. Paul researched board governance models and facilitated two meetings that addressed the limitations of the current organizational structure.



Through evaluation, 100% of the participants agreed or strongly agreed that addressing organizational structure will help strengthen their organization, the facilitated process allowed participants the opportunity to share their thoughts and opinions; and the research provided helped them make an informed decision. Participants evaluated Paul's facilitation as excellent (4.6 on a 5-point Likert Scale) and one participant commented that "Paul was prepared and researched other organizational structures so we could evaluate the pros and cons and how they relate to EDWC."

THE YOUTH AND FAMILY PROJECT, INC.

Founded in 1975, The Youth and Family Project, Inc. provides a variety of support, education and counseling services, aimed at reuniting the family divided by crisis and enriching family relationships. The executive director of the organization contacted Paul to develop a strategic plan for the organization. Paul facilitated two sessions that provided a demographic overview of the county; reviewed the organization's current mission statement; created a vision

statement; identified strengths, weaknesses, opportunities and challenges; identified internal and external stakeholders; and prioritized strategic goals.

Through evaluation, participants strongly agreed that discussing organizational vision assisted them in identifying a general direction for their organization's future (4.7 on a 5-point Likert Scale) and that the process of identifying and prioritizing goals increased their ability to identify issues and set priorities (4.8). Participants evaluated Paul's facilitation as excellent (4.6) and one participant commented that "It is excellent the way that you keep us moving without rushing us. I feel respected and listen to. Thank you!"

CEDARBURG ARTISTS GUILD

For over 30 years, the Cedarburg Artists Guild has been dedicated to promoting and preserving the arts in southeastern Wisconsin through education, scholarships, events and programs. Membership is restricted to those in Washington and Ozaukee Counties. Paul collaborated with the Ozaukee County Community Development Educator to facilitate a strategic planning process for the Guild. Participants strongly agreed (4.9) that the process increased their ability to identify issues and set priorities. Additionally, participants evaluated Paul's facilitation as excellent (5.0).



WASHINGTON COUNTY CAMPUS FOUNDATION AT UW-WASHINGTON COUNTY

The Washington County Campus Foundation at UW-Washington County contacted Paul to facilitate a process to develop a strategic plan for the organization. Through the use of an Organizational Assessment Tool (OAT), Paul identified organizational strengths and weaknesses. These were used to guide board discussion on how the organization and board are functioning. Over three sessions, participants updated the organization's mission; created a vision; identified organizational strengths, weaknesses, opportunities and challenges; prioritized goals; and assigned goals to committees for action plan development.

Through evaluation, participants agreed that the OAT was helpful in identifying strengths and opportunities related to how the board is functioning (4.1 on a 5-point Likert Scale) and that the process of identifying and prioritizing goals increased their ability to identify issues and set priorities (4.4). Participants evaluated Paul's facilitation as excellent (4.5). Comments on Paul's facilitation include: "the process has helped the board grow as a team and better understand what their goals and focus should be;" and "Paul is an exceptional facilitator! We are lucky to have him support our efforts!"

VOLUNTEER CENTER

The Volunteer Center of Washington County promotes and supports effective volunteerism, serves as the resource and coordinator center for volunteers and a catalyst to build coalitions and community partnerships. During the past year, the organization has gone through significant changes- new executive director, new board members, change in funding and a refocus of the organization's mission. The Executive Director contacted Paul to facilitate a visioning process with the organization's board and staff.

Through evaluation of the session that Paul facilitated, participants strongly agreed that discussing organizational vision assisted them in identifying a direction for their organization's future (4.8 on a 5-point Likert Scale) and that discussing an action plan increased their ability to focus strategies into future actions (4.3). Paul's facilitation of the process was evaluated as excellent (4.7). One participant commented that "Paul is organized and keeps the session and its members on task and on time. He uses visual and verbal models for us to follow. Very professional and likeable!"



FRIENDS OF ABUSED FAMILIES

Friends of Abused Families "empowers and provides safety to those affected by domestic and sexual violence through support services and prevention education in Washington County." Representatives from the organization contacted Paul to facilitate a process to address several strategic priorities facing the organization. As a result of the session, participants agreed (3.8 on a 5-point Likert Scale) that discussing strategic issues helped to clarify their direction as an organization. Paul's facilitation of the process was evaluated as excellent (4.5). One participant commented that "each member could contribute- not too pushed. We moved at a comfortable pace and had time to consider all viewpoints." Another commented that "overall, Paul has great facilitation skills, is approachable, remains neutral through his facilitation."



4-H HORSE AND PONY PROJECT

Paul facilitated a process to increase the effectiveness of board meetings of the 4-H Horse & Pony Project. Participants evaluated that developing ground rules was very helpful (4.9), discussing committee roles was very help (4.7), and discussing how to make decision was very helpful (4.6). Overall, participants evaluated Paul's facilitation as excellent (4.9).

COMMUNITY ECONOMIC DEVELOPMENT

MEASURING IMPACT

HARTFORD BUSINESS IMPROVEMENT DISTRICT

The Executive Director of the Hartford Business Improvement District asked Paul to present on downtown business development trends to the organization's board. Through evaluation, participants indicated that they gained knowledge (4.3 on a 5-point Likert Scale) and they thought the information was useful (4.5). One participant commented that the information "helped re-energize our priorities we need to work on."

WASHINGTON COUNTY RETIREMENT INTENTIONS SURVEY

UW-Extension, Economic Development Washington County, UW-Washington County and Moraine Park Technical College partnered with chambers of commerce and local corporations to survey over 3,000 Washington County employees to find out their plans concerning retirement and post-retirement. The results of the 2012 Retirement and Departure Intentions Study were startling. With a 2011 estimated labor pool of just over 67,000, the forecast for retirements of employees in Washington County could reach 34,000 by 2026, with just over 10,000 available as replacements.

Paul Roback facilitated a focus group of 20 senior business leaders to discuss next steps and possible strategies to address this impending labor shortage. As a result of this facilitation, a taskforce of business leaders is meeting to research and develop strategies to address the expected workforce shortage. This taskforce has been meeting monthly since June 2013.

COMMUNICATING EXTENSION'S VALUE

MEASURING IMPACT

WACEC LEGISLATIVE VISITS

On April 9th, about 300 county board members, UW-Extension educators and program participants throughout Wisconsin scheduled visits to their state legislators' offices to reinforce the vital role UW-Extension plays in strengthening Wisconsin families and communities. They included three Washington County 4-H youth members accompanied by a Washington County, a 4-H adult volunteer and UW-Extension's Agricultural Educator and Paul Roback. Together, they visited the office of Rep. Pat Strachota, Rep. Duey Stroebel and Senator Grothman. Additionally, they spoke with Rep. Dan Knodl. The most powerful voices were those

of the three youth, whose composure and confidence underscored their messages about 4-H leadership development opportunities.

In his role as Department Head, Paul scheduled the legislative visits, worked with office Educators to identify program participants, developed training materials for participants, conducted four legislative visits, completed follow-up communication with legislative offices and implemented an evaluation of youth participants. Through evaluation, a youth commented that they were “surprised by how enjoyable it was and how well our three speeches blended together to make a strong story.” When asked how UWEX could have better prepared youth for the experience, one commented “I feel that the trip was well organized. Keep up the good work!”



UWVC AMBASSADORS

As Department Head, Paul presented to the **UW-Washington County Ambassador Council** to inform them of the programs and services of the UW-Extension office. The ambassadors are a volunteer group that promotes UWVC programs and greets campus visitors at numerous community events on campus. Through evaluation, participants gained knowledge of UW-Extension (4.9 on a 5-point Likert Scale) and rated the quality of the presentation highly (4.9). One participant commented that the presentation was “A terrific education for me in just one hour. You were great, Paul. Bet your programs are also.”

4-H LEADERS ASSOCIATION BOARD

In order to increase 4-H youth and adult leaders understanding of UW-Extension and how the 4-H Youth Development program is one component of UW-Extension’s mission, Paul presented to the Washington County 4-H Leaders Association Board at the second meeting of their new board term. Paul provided 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 county’s budget process and the request from the county finance committee to provide them research on 4-H membership fees. After the board meeting, the 4-H Youth Development Educator commented that the presentation “gave great contextual information from the board and it was important for them to hear it from someone outside of the ‘4-H bubble’. Throughout the rest of the board meeting and especially the board orientation later on in the evening, they really connected with the message that they need to raise awareness and be advocates for the program. I feel that your presentation laid the foundation for that tone.”



EDUCATION CONTACTS

Educational contacts reflect all educational programming throughout the year, which covers additional programs and activities not reported as success stories or impact statements.

Direct Educational Contacts	
Community & Economic Development	171
Local Government Education	147
Organizational Development	457
Total	775
Indirect Educational Contacts	
Economic Indicator E-Newsletters	844
Local Government E-Newsletters	117
Non-Profit E-Newsletters	126
UW-Extension E-Newsletter	2,664
UW-Extension Monthly Newsletter	756
West Bend Daily News Articles	17,600
Total	22,107