

2015

Accomplishment Report



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PROGRAM AREA: ORGANIZATIONAL DEVELOPMENT

SUCCESS STORY

BUILDING CAPACITY WITH NINE ORGANIZATIONS

Situation: Washington County non-profit organizations 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 and continues to be a programmatic need in Washington County.

Response: Since starting in Washington County in November 2007, Washington County Community Development Educator Paul Roback has provided organizational development programming to forty-eight nonprofit and government organizations. In 2015, Paul provided one-on-one organizational development programming to nine organizations, coalitions or local governments. This includes facilitating for the Community Health Coalition, Musical Masquers, the Nonprofit Toolbox Coalition, the Richfield Historical Society, the Richfield School District, the Southeastern Wisconsin Invasive Species Consortium, the Volunteer Center, the Washington County Board and the Washington County Information Services Department. 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 and Evidence: Both formal and informal evaluation methods were used to measure the impact of the organizational development programming. The following is a brief overview by organization.

Community Health Coalition- After facilitating strategic thinking activities in 2014, Paul continued to facilitate several additional meetings in 2015. As a result, a chair was identified, goals were reprioritized and the coalition continues to meet.

Musical Masquers- After facilitating strategic thinking activities in 2014, Paul met two additional times with board leadership to develop an action plan template for the organization's next planning process. During these meetings, Paul was able to measure the short-term goals identified during strategic thinking that were accomplished by this organization over the past year. This included developing a new membership structure, updated by-laws, new board structure, secured a permanent theater for performances and produced four profitable performances.

Nonprofit Coalition- Paul continues to collaborate with the United Way, the Volunteer Center and UW-Washington County on nonprofit trainings. Three workshops were held in 2015 with 36 total participants. Increased knowledge was measured through evaluations conducted at the end of each session. Additionally, 90.3% of evaluation responses rated the sessions as good or excellent.

Richfield Historical Society- At the request of the organization's president, Paul reviewed the organization's by-laws and provided feedback. Since the organization has not completed a strategic plan, Paul conducted an organizational assessment tool with board members and reported organizational strengths and opportunities at a board meeting. The organization will reference these materials when considering future strategic planning.

Richfield School District- Paul facilitated a process with 38 district staff in identifying core values for the district. 88.9% of participants agreed or strongly agreed that reaching consensus on district values assisted in identifying the guiding principles for their organization's culture. In order to allow community input on the future direction of the district, Paul facilitated a community visioning process attended by 29 community members. 90.9% of participants agreed or strongly agreed that the visioning session allowed them the opportunity to share their ideas while also allowing others to share their thoughts. Paul is continuing to work with a smaller committee to finalize mission and vision statements for the district.

Southeastern Wisconsin Invasive Species Consortium- Paul facilitated a one day strategic thinking retreat with the organization's board. 100% of participants agreed or strongly agreed that identifying and prioritizing goals increased their ability to identify issues and set priorities. 100% also rated Paul's facilitation as good or excellent.

Volunteer Center- Paul facilitated a strategic thinking process for the organization. As a result, 100% of participants agreed or strongly agreed that the process of identifying and prioritizing goals increased their ability to identify issues and set priorities. 91% agreed or strongly agreed that developing action plans increased their ability to focus goals into future actions. 100% of the participants evaluated Paul's facilitation as good or excellent. One participant commented "Great job Paul! Great, productive session!"

Washington County Board- Paul co-facilitated with the County Administrator a study committee of the Washington County Board. As a result of the efforts of the study committee, the Washington County Board will implement in April 2016 a reduction of committees from 10 to 6 committees, will reduce the size of the County Board from 30 to 26 and they will implement a revised job description for the county board chair.

Washington County Information Services (IS)- Paul facilitated a strategic thinking session with department staff. Through evaluation, 100% of participants agreed or strongly agreed that the session assisted in identifying and prioritizing technology needs for Washington County and a participant commented that the session was a "perfect execution of what I was hoping to accomplish with IS. Good discussion and identification of results."



In order to measure longer-term outcomes of this program, an on-line survey was sent in December 2015 to the organizations that Paul facilitated for in 2015. Eight responses were received from 12 surveys. As a result of Paul's facilitation, 87.5% agreed or strongly agreed that their organization has

been strengthened, 87.5% agreed or strongly agreed that their organization has been more strategic in fulfilling their mission and 100% agreed or strongly agreed that their organization has an increased capacity to address community issues and opportunities. One survey participant commented that “Paul has been instrumental at key moments in our organization's evolution, enhancing our process for honing strategy, building consensus and driving to real outcomes.”

IMPACT STATEMENTS

ECONOMIC DEVELOPMENT WASHINGTON COUNTY

The Executive Director of Economic Development Washington County contacted Paul to facilitate a two hour workshop for the organization’s board. Fourteen board members and staff attended the workshop and through evaluation, 100% of participants agreed or strongly agreed that the purpose statements guiding this workshop were met. This included that the workshop removed barriers to partner and customer outreach and that the workshop created confidence to successfully “make the ask” of current and prospective partners and customers. Overall, 100% of participants evaluated Paul’s facilitation as good or excellent. One commented that “Paul always does a great job of keeping the group on task.”

KETTLE MORAINÉ SYMPHONY

Paul was contacted by a member of the Board of the Kettle Moraine Symphony to facilitate a process to assist them in identifying a strategy to recruit additional board members. As a result of the process Paul facilitated, 100% of participants agreed or strongly agreed that discussing board and committee structures assisted in identifying desired board and committee skill sets needed for the organization. One participant commented that “Paul helped us narrow down and consolidate the structure to better reflect the way we work.” Additionally, 100% of participants agreed or strongly agreed that the discussions helped set a strategic direction for board recruitment. A participant commented that “the defined roles will be used to seek and engage current and potential members.” Participants also commented that “we appreciate the way you (Paul) guided the group, opened it up to all ideas and helped define and identify the ideas that were most relevant.” “We made a lot of progress in a short amount of time.”

RICHFIELD SCHOOL DISTRICT

The Administrator for the Richfield School District contacted Paul to provide professional development for district staff and to facilitate a district visioning process. During a district in-service with 38 staff, Paul facilitated Real Colors®, an interactive workshop that provides skills to understand human behavior to more effectively work with colleagues and improve communication. Additionally, Paul facilitated a process to identify, prioritize and define shared organizational values.

Through evaluation, 100% of participants increased their ability to recognize their strengths and the strengths of others. 95% increased their ability to build rapport quickly with others. 100% increased their ability to understand how others process information and 95% increased their ability to modify their communication to connect with others. 84% agreed that reaching consensus on their values assisted in identifying the guiding principles for their organization’s culture.

WASHINGTON COUNTY HEALTH DEPARTMENT

Washington and Ozaukee Counties have entered into an agreement for a joint Health Department that provides services to both counties. The director of this department contacted Paul to provide a teambuilding program for the staff who were meeting together for the first time. Additionally, Paul was asked to facilitate the development of a department mission, vision and shared values.

Through a teambuilding program that Family Living Educator Carol Bralich and Paul co-taught, 89% of participants increased their ability to recognize their strengths and 93% the strengths of others. 93% increased their ability to build rapport quickly with others. Through Paul's facilitation, 75% agreed that discussing organizational mission helped clarify the role of the organization and 71% agreed that discussing organizational vision assisted in identifying a general direction for their organization's future. 75% agreed that reaching consensus on values assisted in identifying the guiding the principles for their organization's culture. 100% evaluated Paul's facilitation as good or excellent and one participant commented that they "felt that the day was a great step in bridging the two counties."

PROGRAM AREA: LOCAL GOVERNMENT EDUCATION

SUCCESS STORY

TEAM-BUILDING AND COMMUNICATION TRAINING WITH COUNTY EMPLOYEES

Situation: Since January 2014, Washington County government has experienced significant personnel changes. After a long-term county administrative coordinator retired, a new county administrator was hired. Additionally, twelve out of twenty-two departments experienced leadership changes as department heads retired or pursued other opportunities. Significant staffing changes also occurred within departments, including a larger department that experienced a 50% staff turnover in a two year period. As new leadership was hired, several Paul to provide education and team-building among office staff. As a result of this contact, Paul and Family Living Educator Carol Bralich agreed to co-teach a series of Real Colors workshops for interested county departments. Real Colors is an interactive workshop that provides skills to understand human behavior to more effectively work with colleagues and improve communication. The anticipated outcomes for participants include the ability to recognize their strengths and the strengths of others; to build rapport quickly with clientele, colleagues, family and friends; to understand how others process information; and to modify their communication to connect with others.

Response: Paul and Carol facilitated 15 Real Colors workshops, which had 342 participants from 17 county departments. Each 3-hour workshop included an icebreaker activity, instruction, a personality

assessment, small group activities and large group discussions. To encourage teambuilding, workshops were offered by department so that department staff could participate in a shared-learning experience. Smaller departments were grouped together and offered several workshop options. These department staff could select a workshop that fit their schedule. These workshop options were developed to allow for maximum participation while also allowing for continued office operations. At the conclusion of the workshops, departments were provided a graphic that identified the primary and secondary color (personality assessment) for each of their staff. That way department staff that were unable to attend the same workshop could still benefit from knowing each other's colors.



Results and Evidence: Evaluations conducted at the end of each workshop resulted in 314 out of 342 responses, for a response rate of 91.8%. As a result of the workshops, 88.6% of participants agreed or strongly agreed that they increased their ability to recognize their strengths, 95.8% agreed or strongly agreed they increased their ability to recognize the strengths of others; 76.5% agreed or strongly agreed that they increased their ability to build rapport quickly with clientele, colleagues, family and friends; 91.3% agreed or strongly agreed they increased their ability to understand how others process information; and 84.2% agreed or strongly agreed that they increased their ability to modify their communication to connect with others. Overall, 59.2% of participants rated Paul and Carol's facilitation as excellent, 38.5% as good and 2.3% were neutral.

The Real Colors workshop series was clearly valued by whom it was intended. This was measured through qualitative comments received in evaluations. Comments include: "very interesting;" "enjoyed the presentation, very informative;" "loved the transparency, to know all colors;" "wish we could have other trainings like this throughout the year;" "I started out with a negative view that this would be the same as all the previous personality seminars- I ended up feeling impressed and happy I had the opportunity to attend;" "I really did not want to attend but I am pleasantly surprised- I enjoyed it;" and "good insight about personality characteristics and to look at them as strengths."

Paul and Carol were intentional in creating inclusive workshops so that participants felt welcomed, appreciated and comfortable. This was measure through qualitative statements received on evaluations, including; "very personable instructors- relates well with all," "enjoyed the personalities of the presenters;" and "good job in including everyone in activities."

IMPACT STATEMENTS

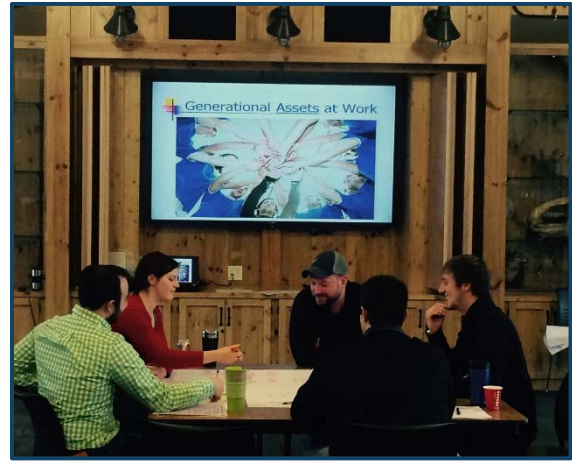
CHANGE MANAGEMENT SERIES FOR COUNTY LEADERSHIP

Paul Roback was contacted by the Washington County Human Resources (HR) Department to collaborate on developing and implementing a Change Management Training Series for county department heads and managers. In the past several years, the County has undergone substantial changes and staff indicated a need for resources to effectively deal with this change.

As a result of this collaboration, Paul co-taught with Sandy Weiland (County HR) three sessions to 59 total participants. Prior to the training, 27% participants indicated they had a good or very good understanding of the four stages of the change curve. After the session, this increased to 93%. Prior to the session, 37% indicated a good or very good understanding of how to handle resistance to change. After the session, this increased to 81%. Prior to the session, 39% indicated a good or very good understanding of how to lead employees through the change cycle. After the session, this increased to 86%. Overall, 90% of the participants rated the facilitators as good or excellent. A participant commented that it was “a very good presentation. Paul and Sandy did a nice job.”

COMMUNICATION TRAINING WITH PLANNING & PARKS EMPLOYEES

Over the past several years, the Washington County Planning and Parks Department has undergone several organizational changes, including department mergers, office relocations and leadership changes. In order to strengthen the office team, the department’s administrator contacted Paul to facilitate a training session on effective workplace communication for 32 employees. As a result of this training, 87% agreed or strongly agreed that the session increased their ability to modify their communication to connect with others and 91% agreed or strongly agreed that the session increased their ability to modify their approach to more effectively work with others. 100% of the participants evaluated Paul’s facilitation as good or excellent.



MID-MORAINÉ MUNICIPAL ASSOCIATION

The Mid-Moraine Municipal Association includes incorporated municipalities in Ozaukee and Washington Counties who share information and resources. The Association’s executive director contacted Paul to facilitate a process to identify the association’s top legislative priorities. Through evaluation, 89% of the eight participants indicated that the facilitation was very helpful in identifying legislative priorities and 100% evaluated Paul’s facilitation as very helpful. One commented, “As always, Paul did a wonderful job.”

PROGRAM AREA: COMMUNITY DEVELOPMENT

IMPACT STATEMENTS

VILLAGE OF SLINGER COMMUNITY VISIONING

The Village of Slinger’s Administrator contacted Paul to facilitate a process to obtain input from the community on a future direction for the Village. A Community Visioning Session was held with 38 participants, including Village board members, business owners and residents. Matt Kures, from the

UW-Extension Center for Community Economic Development, presented Census demographic information and economic data and then Paul facilitated a process for participants to identify community assets and their ideal vision for the Village.

Through evaluation, 92% of participants agreed or strong agreed that the presentation increased their understanding of economic and demographic data for Slinger, 95% agreed or strong agreed that the brainstorming session identified community assets to build upon, and 82% agreed or strongly agreed that the visioning exercise allowed them the opportunity to create their ideal vision for the future development of the Village of Slinger. 97% of the participants evaluated Paul's facilitation as good or excellent. A draft report was created and presented to the Village Board.

NONPROFITS AND THE ECONOMY SURVEY

Paul collaborated with the Nonprofit Coalition of Washington County to complete the 2015 Washington County Nonprofits & the Economy Survey, which found that 77% of nonprofits have experienced an increase in demand for services over the previous year and nearly one-third (32%) reported having waiting lists for their services in 2015. This is a substantial increase since 2012, where a similar survey reported that 11% of nonprofits reported having waiting lists for services. The study also found that the financial health of area nonprofits has decreased. Two-thirds (66%) of nonprofits reported being financially healthy to date, but feel vulnerable in the future. This is compared to 40% in 2012. Increased demand for services while financial strength is weakening is an unsustainable model for nonprofits. In order to survive, nonprofits may need to increase revenues or reduce services. Each option presents numerous opportunities and challenges. How will nonprofits, donors and the business community respond to this challenge?

Paul presented the survey results to representatives from four Washington County area foundations. One participant commented "Thank you. I found the information both very interesting and very helpful." Additionally, an article appeared in the Washington County Daily News, which has a circulation of almost 9,000 copies. Paul authored a report of the survey results, which can be found at <http://tinyurl.com/washcononprofitsurvey>.

CHANCELLOR'S AWARD FOR EXCELLENCE

In 2015, Paul Roback received the UW-Colleges/UW-Extension Chancellor's Award for Excellence. Paul was recognized for "innovative programming that significantly impacts citizen engagement, local government practices, economic development, nonprofit education and organizational development." In expressing their support for the award, leaders from the United Way of Washington County, UW-Washington County and the Volunteer Center of Washington County wrote that: "Paul is a proven leader whom we have grown to count on. He always follows through and makes things happen." The annual Chancellor's Awards recognize exceptional teaching, outreach, collaborations and public service. Additionally, State Representative Dan Knodl presented Paul with a State of Wisconsin Citation by the Legislature commending his achievement (photo).



EDUCATIONAL CONTACTS

Direct Contacts	
Organizational Development	453
Local Government Education	699
Community Development	239
Total	1,391
Indirect Contacts	
Economic Development E-News	200
Local Government E-News	105
Total	305