

# 2016

## Accomplishment Report



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## PROGRAM AREA: ORGANIZATIONAL DEVELOPMENT

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### SUCCESS STORY

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#### BUILDING CAPACITY WITH SIX ORGANIZATIONS

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**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 fifty-two nonprofit and government organizations. In 2016, Paul provided one-on-one organizational development programming to six organizations. This includes facilitating for Blue Lotus Farm & Retreat Center, Casa Guadalupe Education Center, LIFE OF HOPE, NAMI Washington County, Village of Kewaskum's i4Learning Community School, and the Washington County Historical Society. Each facilitated process started 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:** 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.

Blue Lotus Farm & Retreat Center "exists to serve people with life challenges by providing recreational and therapeutic opportunities in a natural day camp setting." Paul met with the organization's president and executive director to identify outcomes for the planning session. As a result of this meeting, Paul facilitated a session with nine board members and staff. Through evaluation, 100% of the participants agreed that identifying and prioritizing goals increased their ability to identify issues and set priorities. 100% agreed that discussing action plans increased their ability to focus goals into future action. 88% evaluated Paul's facilitation as good or excellent. One participant comment that "Paul did a great job leading us through today's six activities."

Casa Guadalupe Education Center's mission is "to be the bridge of Integration to Hispanics and to the communities in which they live through education and community access." After meeting with the Executive Director and Board President, Paul conducted a board assessment and facilitated a strategic thinking process with 12 board members and staff. Through evaluation, 100% of the participants agreed or strongly agreed that the organizational assessment tool was helpful in identifying strengths and opportunities related to how the board is functioning. 92% agreed or strongly agreed that discussing key strategic issues helped clarify their direction as an organization. 92% agreed or strongly agreed that

discussing action plans increased their ability to identify next steps for future implementation. 92% rated Paul's facilitation of the meeting as good or excellent and one person commented that "Paul does a great job and we truly appreciate his time."

LiFE of HOPE's mission is to "reduce the number of suicide attempts thereby leading to a natural reduction in the lives lost to suicide." As a new nonprofit, the executive director and board wanted to engage in strategic discussions to help guide the future direction of the organization. As a result of this contact, Paul conducted an organizational assessment and then facilitated a half-day retreat with 12 of the organization's board and staff members. Through evaluation, 100% of the participants agreed that the organizational assessment tool was helpful in identifying strengths and opportunities related to how the board is functioning and 90% agreed that the process of identifying and prioritizing goals increased their ability to identify issues and set priorities. 90% of the participants evaluated Paul's facilitation as excellent and one commented; "truly an impressive example of facilitation excellence. Thank you for keeping the board on track while allowing for some cross-talk of ideas to be cultivated."



NAMI (National Alliance on Mental Illness) Washington County, Inc. "provides advocacy, education, support and public awareness so that all individuals and families affected by mental illness can build better lives." The organization's new executive director contacted Paul to facilitate a strategic planning retreat for the organization's board and staff. As a result of a preplanning session with the executive director and board leadership, Paul facilitated a 4-hour retreat with 10 participants. Through evaluation, 100% of participants agreed that the organizational assessment tool identified strengths and opportunities related to how the board was functioning. 100% agreed that the process used to identify and prioritize goals increased their ability to identify issues and set priorities. 100% also agreed that discussing action plans increased their ability to focus goals into future actions. Overall, participants evaluated Paul's facilitation as excellent (4.9). One participant commented that Paul "moved discussions along efficiently."

The Village of Kewaskum's i4Learning Community School is a charter school within the Kewaskum School District. Leadership from the organization contacted Paul to facilitate a strategic thinking session. Paul facilitated a 3.5 hour session with 19 participants, which included governance council (board) members, school staff and representatives from the Parent Teacher Organization. Through evaluation, 100% of the participants agreed that the session identified strengths, weaknesses, opportunities and challenges. 82% agreed that the process of brainstorming and prioritizing goals increased their ability to identify issues and set priorities. 87% evaluated Paul's facilitation as good or excellent. One participant commented: "Thank you. I think today's session achieved what we identified as the purpose- create a way to work towards the same vision. I appreciate all of your help in moving us forward!"

The Washington County Historical Society "preserves, collects, interprets, and encourages community interest in the education and research of Washington County's history ensuring that audiences of all ages continue to share and appreciate their rich heritage." Paul was contacted by the organization's

executive director to facilitate a board and staff retreat that focused on discussing key strategic issues the organization was considering. As a result of Paul's facilitation, 100% of participants agreed or strongly agreed that the session assisted in identifying internal organizational strengths and weaknesses and external opportunities and challenges. Additionally, 82% agreed or strongly agreed that discussing strategic issues helped to clarify their direction as an organization. Overall, 91% of the participants evaluated Paul's facilitation as good or excellent. Participants commented that "Paul let us discuss hot topics, but kept us focused" and Paul was "excellent to work with, very organized and prepared."



**Evidence:** In order to measure the cumulative impact of Paul's organizational development programming, evaluation results from these six organizations were combined to develop average scores for each of the key elements of the facilitated strategic thinking process. The four organizations that completed an organizational assessment tool strongly agreed that the tool was helpful in identifying strengths and opportunities related to how the board was functioning (4.6 on a 5-point Likert Scale). The four organizations that reviewed or rewrote their mission statements agreed that the process helped clarify their role as an organization (4.4). The four organizations that created or rewrote vision statements agreed that the process assisted them in understanding the general direction of the organization's future (4.4). The five organizations that completed a force field analysis strongly agreed that the process assisted in the identification of strengths, weaknesses, opportunities and challenges (4.6). The four organizations that identified and prioritized goals strongly agreed that the process increased their ability to identify issues and set priorities (4.6). The four organizations that discussed action plans strongly agreed that the process increased their ability to focus goals into future actions (4.8). Overall, participants evaluated Paul's facilitation of these processes as excellent (4.7).

Longer-term outcomes were measured through an on-line survey sent at the end of the year to eight organizations. Four of the eight organizations surveyed were included in this Success Story. The additional four organizations are reported as Impact Statements elsewhere in this report. The survey responses indicated that as a result of Paul's facilitation, 100% agreed or strongly agreed that their organization has been strengthened, 100% agreed or strongly agreed that their organization has been more strategic in fulfilling their mission and 89% agreed or strongly agreed that their organization has an increased capacity to address community issues and opportunities.

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## IMPACT STATEMENTS:

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### ECONOMIC DEVELOPMENT WASHINGTON COUNTY

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The Executive Director of Economic Development Washington County contacted Paul to facilitate a portion of the organization's annual retreat, which included the expected outcomes of developing a collective understanding of an evolved business model for the organization, identifying core strategic issues and catalyzing board camaraderie. After several data presentations, including one by Matt Kures at the UW-Extension Center for Community Economic Development, Paul facilitated a dialogue process to achieve the desired retreat outcomes. Through evaluation, 90% agreed that the facilitated discussion assisted in the identification of core strategic priorities. 60% agreed that the discussion assisted in consensus on resulting strategic priorities and critical drivers. 100% agreed that the session helped

catalyze board camaraderie and 100% agreed that that the new evolved business model strikes a solid balance between being visionary yet achievable. Participants evaluated Paul’s facilitation as excellent (4.5 on a 5-point Likert Scale).

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#### CRIMINAL JUSTICE COORDINATING COMMITTEE

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At the request of Judge Martens, Paul facilitated the organizational meeting for the Washington County Criminal Justice Coordinating Committee (CJCC). A CJCC provides an opportunity for key members of the justice system to understand and potentially improve criminal justice policy, programs, and operational decision-making. At this first meeting, there were 12 participants representing key parts of Washington County’s criminal justice system. As a result of the discussion that Paul facilitated, participants agreed (4.0 on a 5-point Likert Scale) that they have a better understanding of the purpose of a CJCC, their expectations in forming a CJCC (3.9), and their next steps (4.1). Overall, participants evaluated Paul’s facilitation positively (4.4). One participant commented that as a result of the discussion, there are “lots of good next steps and places to dig into.” Participants agreed to continue meeting in order to increase their understanding of the criminal justice system and its individual parts. Judge Martens volunteered to chair future meetings and the members will work towards a more formalized structure for the CJCC.

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#### CHILD ADVOCACY CENTER

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The Human Services Departments of Washington and Ozaukee Counties Paul to facilitate an organizational meeting for the development of a Regional (multi-county) Child Advocacy Center. This Center will be a “trauma informed environment where partners investigate child abuse collaboratively, families receive support and advocacy, and most importantly, a child’s words are always heard.” After meeting with several individuals working together on this collaboration, Paul developed a work plan and facilitated two meetings with collaboration members. Through evaluation, 100% of participants agreed that discussing their purpose assisted them in identifying the fundamental need they were trying to address. 100% agreed that developing a mission statement helped clarify the Child Advocacy Center’s specific focus and that developing a vision statement assisted them in understanding the general direction for the future of the Child Advocacy Center. 100% also agreed that discussing their next steps increased their ability to identify action items to move forward with. Participants evaluated Paul’s facilitation of the meetings as excellent (a 4.9 on a 5-point Likert Scale). One participant commented that “this meeting moved us forward by leaps and bounds.”

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#### WASHINGTON COUNTY NONPROFIT CONFERENCE

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The Volunteer Center of Washington County sponsored a Nonprofit Conference to provide training and support for nonprofit staff, board members and key volunteers. Providing training to nonprofits aligns with Paul’s organizational development programming. Because of this alignment, Paul served on a committee and assisted with conference planning, identified the conference keynote speaker and co-presented a conference breakout session entitled “Nonprofit Collaboration: Mission Impossible?” Twenty-three attended this breakout session.

This first annual conference had 70 participants representing 32 nonprofit organizations. Of the 35 participants that responded to the post-conference evaluation, 98% rated the conference good or excellent, 94% were very satisfied with the keynote presenter, 73% were quite a bit satisfied or very satisfied with nonprofit collaboration breakout session that Paul co-facilitated and 98% felt re-energized in their commitment to their organization and to their work. One participant commented that they “loved the conference. Thank you for gathering such high quality speakers for us to learn from and meet.”



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## NONPROFIT TRAINING SERIES

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Paul collaborated with the United Way, Volunteer Center and UW-Washington County to host a 3-part training series for nonprofits. The Nonprofit Center of Milwaukee agreed to provide the training at a discounted rate for Washington County nonprofits. Forty participants gained knowledge on structuring a high performance board, the board building cycle and the board’s role in fundraising. Paul’s contributions to the collaboration included developing and implementing evaluations for each session. As a result, thirty-one participants completed end of session evaluations. At the first session, participant knowledge on structuring a high performance board increased from 3.3 to 4.3 (measured on a 5-point Likert Scale where 1 is no knowledge and 5 is very good knowledge). At the second session, participant knowledge on the board building cycle increased from 3.1 to 4.6. At the third session, participant knowledge on the board’s role in fundraising increased from 2.7 to 4.5. For the three-part series, participants rated the sessions as excellent (4.6). Comments received through evaluation include: “Excellent presenter!” “Absolutely outstanding! Great information!” “Solid reminder of the importance of Board of Directors involvement” in fundraising.

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## RICHFIELD SCHOOL DISTRICT

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The Superintendent of the Richfield School District contacted Paul to facilitate a process that would develop a mission, vision and slogan for the school district. In 2015, Paul facilitated a process with 38 district staff that identified core values for their organization. That same year, Paul facilitated a visioning process for the school district that engaged 29 community members. In 2016, Paul facilitated an eight person steering committee that used the output from 2015 to guide the development a district mission statement, vision statement and slogan. Through evaluation, 100% agreed or strongly agreed that discussing a mission statement helped clarify their role as an organization, 100% agreed or strongly agreed that discussing a vision assisted them in identifying a general direction for the school district, and 94% agreed or strongly agreed that discussing a slogan helped to create a brand identity for the district. 100% evaluated Paul’s facilitation as excellent. Participant comments include that Paul “kept us on task, moved the conversation along.” “Very positive experience, thanks for your leadership.” “Very successful, positive meeting.”

## PROGRAM AREA: LOCAL GOVERNMENT EDUCATION

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### IMPACT STATEMENTS

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#### CITY OF WEST BEND STAFF DEVELOPMENT

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The new administrator for the City of West Bend contacted Paul to facilitate a Real Colors® workshop for city department heads and managers. As a result of this contact, Paul and Family Living Educator Carol Bralich co-facilitated a Real Colors® training for 23 staff. This is a dynamic workshop experience that increases participants ability to recognize their strengths and the strengths of others, build rapport quickly with others, understand how others process information, and how to use their communication to connect with others.



Through evaluation, 95% of participants increased their ability to recognize their strengths and 91% increased their ability to recognize the strengths of others. 75% increased their ability to build rapport quickly with others. 95% increased their ability to understand how others process information and 76% increased their ability to modify their communication to connect with others. 100% evaluated Paul and Carol's facilitation of the session as good or excellent. One participant commented that "Paul and Carol are great facilitators."

#### WASHINGTON COUNTY STAFF DEVELOPMENT

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Paul and Family Living Educator Carol Bralich continue to co-facilitate Real Colors® workshops for Washington County employees. This is a dynamic workshop experience that increases participants ability to recognize their strengths and the strengths of others, build rapport quickly with others, understand how others process information, and how to use their communication to connect with others. Since 2014, nearly 350 county employees have participated in the program. County Administrator Schoemann stated that "the work that Paul and Carol did with our Team was extraordinarily impactful. Real Colors® served as an excellent tool to integrate both our new and our long serving teammates to help them build relationships, which are essential to their day to day work. Almost a year later, you frequently hear references to one another's 'Colors' and how those personality traits drive our Team and our interactions, recruitments and retention. We are already beginning to discuss the next steps in Real Colors® to continue to grow our Team."

In 2016, an additional workshop was held for 14 county employees. Through evaluation, 100% of participants increased their ability to recognize their strengths and increased their ability to recognize the strengths of others. 93% increased their ability to build rapport quickly with others. 100% increased their ability to understand how others process information and 92% increased their ability to modify their communication to connect with others. Overall, participants evaluated Paul and Carol's facilitation of the session as excellent (a 4.8 on a 5-point Likert Scale). One participant commented that the "facilitators were easy to speak with and put everyone at ease."

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## WASHINGTON COUNTY HUMAN SERVICES DEPARTMENT STAFF DEVELOPMENT

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In 2015, Paul co-facilitated Real Colors® training for all Washington County Human Service department staff in 2015. Due to the success of these workshops, the Children and Families Division manager of the Human Services Department contacted Paul to facilitate an additional workshop on teambuilding and communication. Paul adapted curriculum from Real Colors® and Communicating across the Generations and taught a 2-hour workshop to 29 division staff. Through evaluation, 89% of participants agreed that the workshop increased their knowledge of the four generations and how generational differences affect them. 68% agreed that they increased their skills for effective intergenerational communication and 82% enhanced their approach to more effectively work with others. Overall, participants rated Paul's facilitation of the workshop as excellent (a 4.5 on a 5-point Likert Scale). One participant commented "great presenter, well spoken – good job."

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## VILLAGE OF KEWASKUM- MISSION & VISION STATEMENT UPDATES

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The administrator for the Village of Kewaskum contacted Paul to facilitate a process to update the village's mission and vision statements. Paul designed and implemented an on-line survey to gather input from village board members and staff to solicit their feedback on the village's current statements and to offer suggestions for new statements. Paul compiled the results and facilitated a discussion with the Village board, which resulted in revised statements. Through evaluation, 100% of participants agreed that updating the village's mission helped clarify their role as an organization and 93% agreed that creating a vision statement assisted them in understanding the general direction for their village government's future. Overall, participant's evaluated Paul's facilitation as excellent (a 4.7 on a 5-point Likert Scale).

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## VILLAGE OF SLINGER- IMPLEMENTATION FROM VISIONING PROCESS

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In 2015, 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. After the session, Paul developed a visioning report and presented it to the village board. The results of this process helped to inform future decisions made by the village staff and the village board. In 2016, the village hired a planning consultant to engage the community and the village in the development of an economic development plan for the village. As part of the village's 2017 budget process, funding was included to begin implementing parts of this plan. Although Paul did not work with the village in 2016, the longer-term outcomes of the visioning process that he facilitated in 2015 were realized in 2016 due to the follow-through of the village board and staff.

## PROGRAM AREA: COMMUNITY DEVELOPMENT

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### IMPACT STATEMENTS

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#### GLACIER HILLS CREDIT UNION STAFF DEVELOPMENT

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Through a partnership with the Volunteer Center of Washington County, Paul and 4-H Youth Development Educator Brianna Stapleton Welch co-taught a program to strengthen office teamwork and communication to 44 staff at Glacier Hills Credit Union. The information taught was adapted from UW-

Extension's Communicating across the Generations curriculum. Through evaluation, participants indicated that they gained knowledge (4.1 on a 5-point Likert Scale), found the information useful (4.2) and that it was a high quality presentation (4.7). One participant commented that "this was informative, fun and great

team-building exercise- thank you." Due to the success of this workshop, leadership at Glacier Hills contacted Paul to provide additional training to their staff. At the second workshop, Paul co-facilitated a Real Colors® workshop with Family Living Educator Carol Bralich for 37 staff. Real Colors® is a dynamic workshop experience that increases participants ability to recognize their strengths and the strengths of others, build rapport quickly with others, understand how others process information, and how to use their communication to connect with others. Through evaluation, 100% of participants increased their ability to recognize their strengths and increased their ability to recognize the strengths of others. 85% increased their ability to build rapport quickly with others. 97% increased their ability to understand how others process information and 91% increased their ability to modify their communication to connect with others. 95% evaluated Paul and Carol's facilitation of the session as good or excellent. One participant commented "Awesome information and great activity. Very useful to take information away from this presentation and use it in actual life!" Another commented "Everything helped me learn how to work with others who I can go to if I need some help. Awesome job!"



#### WOMEN'S FOCUS INC.: WORKPLACE COMMUNICATIONS TRAINING

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Paul provided communications training to 18 business professionals who attended a Women's Focus Inc. business meeting. Women's Focus is an organization for women business owners, management executives, and professionals in Ozaukee County. Paul adapted the Communicating across the Generations curriculum and taught a one hour workshop titled "Capitalize on Generational Differences in Work Environments." As a result of this session, participants indicated through evaluation that they gained knowledge (4.5 on a 5-point Liker scale with 5 being the highest), found the information useful (4.7) and that it was a high quality presentation (4.8). One participant commented "well done, useful, professional and personable." Another commented that the presentation was "fabulous. Everyone was engaged."

## SCHOLARLY ACTIVITIES

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Paul accomplished the following scholarly activities in 2016:

- Presented a concurrent break-out session entitled “Collaboration: The Key to Innovation in the Nonprofit Sector” at the 2016 CRD Department Symposium. Content for this session was based on his research on “Measuring the Fiscal Strength and Educational Needs of Washington County Nonprofits.” This session was attended by an estimated 25 participants. Evaluations were conducted by the conference planning committee after the conference. Sixteen responses were received for this session. As a result of attending this session, 31% strongly agreed and 63% somewhat agreed that their understanding of the barriers to and opportunities for collaboration in communities across Wisconsin had increased. Additionally, 25% strongly agreed and 63% somewhat agreed that their knowledge of how Extension educators’ can play a role in nonprofit collaborations had increased. At the session, 15 participants requested copies of the session materials.
- Presented a concurrent break-out session entitled “Collaboration Guides Nonprofit Education & Community Conversation” at the 2016 Joint Council for Extension Professionals (JCEP) Conference. Content for this session was based on his research on “Measuring the Fiscal Strength and Educational Needs of Washington County Nonprofits.” Evaluations were conducted by the conference planning committee after the conference. Although there were around 12 people who attended the session, only 3 completed the on-line evaluation. On a 5-point Likert Scale, they evaluated the session a 4.3 for content, delivery and value to their work. After the conference, five session participants contacted me for session materials and a comment received by e-mail stated “Great job at JCEP. I enjoyed your evaluation work with non-profits and pulling outcomes consistently from work. A good practice you have set up.”
- Co-presented a concurrent break-out session entitled “Collaborations: Mission Impossible?” at the 2016 Nonprofit Conference in Washington County. A portion of the content for this session was based on his research on “Measuring the Fiscal Strength and Educational Needs of Washington County Nonprofits.” This session was attended by 23 participants. Evaluations were conducted by the conference planning committee after the conference. Eleven participants responded to a question that measured satisfaction with this session (18% were very satisfied, 55% were quite a bit satisfied, 27% were somewhat satisfied and 0% were not satisfied).
- Co-presented a concurrent breakout session entitled “Real Colors® and Change” at the 2016 East-Metro Region Educational Conference. Seven participants learned how a person’s Real Colors temperament may affect how they react to change. During the session, participants applied their Real Colors knowledge to develop strategies to help office colleagues process the uncertainty of the potential change within UW-Extension.

## EDUCATIONAL CONTACTS

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<b>Direct Educational Contacts</b>	
Organizational Development	456
Local Government Education	99
Community Development	186
<b>Total</b>	<b>741</b>