

# 2017

## Accomplishment Report



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## Organizational Development

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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, as measured by three nonprofit surveys that Paul conducted in 2012, 2015, and 2017.

### Germantown Chamber of Commerce

Paul was contacted by representatives from the Germantown Chamber of Commerce to provide facilitation that would assist their organization in being more strategic. After a preplanning meeting with the organization's executive director and board leadership, Paul designed and facilitated a 3.5-hour strategic planning session that was attended by nine board members and two staff. As a result of this facilitation, 90% agreed that the facilitation assisted in identifying organizational strengths, weaknesses, opportunities, and challenges. 70% agreed that identifying and prioritizing goals increased their ability to identify issues and set priorities. 80% agreed that discussing action plans increased their ability to focus goals into future actions. Overall, 100% of the participants evaluated Paul's facilitation as good or excellent. One participant commented through evaluation that they "thought the meeting was very helpful. The Chamber's goals for the next few years are very important to keeping it in the community."

### Kettle Moraine Symphony

Paul was contacted by the president of the Kettle Moraine Symphony board to provide facilitation that would assist the board in being more strategic. Paul had previously worked with this organization in 2014. After a preplanning meeting with board leadership, Paul designed and facilitated a four-hour strategic planning session that was attended by nine board members.

As a result of this facilitation, 100% of the participants strongly agreed that reviewing the organization's mission statement helped clarify their role as an organization, 100% strongly agreed that creating a vision statement assisted them in understanding the general direction for the organization's future, 100% strongly agreed that identifying and prioritizing goals increased their ability to identify issues and set priorities, and 88% strongly agreed that discussing action plans increased their ability to focus goals into future actions. Overall, 100% of the participants evaluated Paul's facilitation as excellent. A participant commented that Paul is "an excellent facilitator of group organizational development... I specifically asked the Board to allow me to contact [him] and ask for [his] help."

### Lakeshore Regional Child Advocacy Center

In 2016, Paul's facilitation with a group community stakeholders from Washington, Ozaukee, and Sheboygan Counties resulted in the development of mission and vision statements for a three-county Child Advocacy Center (CAC). Since this initial facilitation, these stakeholders incorporated a 501(c)3 nonprofit organization, developed a board of directors, and branded the initiative the Lakeshore Regional CAC. In 2017, Paul was asked by the board's leadership to facilitate a process to identify and prioritize organizational goals. As a result of this contact, Paul facilitated a strategic thinking process with 15 board members and community stakeholders.

Through evaluation, 93% of the participants agreed that the facilitation identified organizational strengths, weaknesses, opportunities, and challenges. 93% also agreed that identifying and prioritizing goals increased their ability to identify issues and set priorities. 100% rated Paul's facilitation of the meeting as good or excellent and one person commented that Paul "was great and so helpful for moving our mission forward."

### Richfield Historical Society

The President of the Richfield Historical Society contacted Paul to facilitate a strategic planning process with the organization's board. This request was a follow-up to an organizational assessment Paul conducted of the organization's board in 2015. The Society's mission is to discover, collect, preserve and promote the history of the Village of Richfield.

After a pre-planning meeting that identified the intended outcomes of a planning process, Paul facilitated a half-day session with 18 board members that included affirming the organization's mission; creating a mission statement; identifying organizational strengths, weakness, opportunities and challenges; and identifying and prioritizing goals.

As a result of this session, 100% of the participants agreed that developing a vision statement assisted them in understanding the general direction for their organization's future and 92% agreed that the process of identifying and prioritizing goals increased their ability to identify issues and set priorities. Participants evaluated Paul's facilitation as excellent (4.8 on a 5-point Likert Scale). One commented that Paul "Provided opportunity for all to be heard. Created a comfortable atmosphere to dig through the process."

The board is currently reviewing the session notes and will discuss how to move forward with developing plans to accomplish their goals. The anticipated long-term outcomes of this planning process include that members will report that the organization has been strengthened, is more strategic in fulfilling its mission, and has an increased capacity to address community issues and opportunities.

### UW-Washington County Campus Foundation

Paul was asked by the Interim Executive Director for the Washington County Campus Foundation at UW-Washington County to facilitate a board retreat that would revise the organization's mission and vision statements and address strategic issues for the organization. The Foundation creates "opportunities for students by acting as the official fundraising organization for the UW-Washington County." As a result of this contact, Paul facilitated a strategic thinking process with 15 board members and staff.

Through evaluation, 80% of the participants agreed that reviewing the organization's mission statement helped clarify their role as an organization, 73% agreed that reviewing the organization's vision assisted in understanding the general direction for the organization's future, and 86% agreed that identifying and prioritizing goals increased their ability to identify issues and set priorities. 85% rated Paul's facilitation of the meeting as good or excellent and one person commented that "Paul was terrific to work with and was a huge help in accomplishing a challenging task in 4 hours."

### Washington County Board of Supervisors

Washington County has previously identified strategic issues in 2007, 2010, and 2013. As part of the 2015 Priority Based Budgeting (PBB) Process, the Washington County Board developed a mission statement, vision statement, core values, and high-level strategic priorities for the organization. Since it

has been several years since the County Board had the opportunity to discuss and prioritize strategic issues as a group, a new planning process was desired.

Previously, Paul co-facilitated the County Board's 2013 strategic priority setting process. In 2015, Paul participated in PBB process and facilitated parts of the mission and vision development process. In 2017, Paul collaborated with Washington County Administration to design and facilitate a multi-step process that included individual brainstorming, small group dialogue, and an opportunity for the entire board to collectively discuss strategic priorities. Twenty-four county board members attended this session. Paul and County Administration used the information gathered from this process to draft a report that detailed the county's strategic priorities for 2017-2019. As a result of these efforts, the County Board adopted this report at their April 18, 2017 meeting by a vote of 21-3.

### Washington County Highway Department

Paul was asked by the Commissioner of the Washington County Highway Department to facilitate a process to update the department's mission statement, create a vision statement, and identify short- and long-term goals. As a result of Paul facilitating a 1-hour session with 9 department staff, 78% of participants agreed that updating the mission statement helped clarify their department's role, 88% agreed that creating a vision statement assisted them in understanding the general direction for their department's future, and 78% agreed that discussing goals increased their ability to identify issues and set priorities. 89% of participants rated Paul's facilitation as good or excellent. Paul is currently working with the Highway Commissioner to develop a report of this work to present to the Washington County Public Works Committee.

### Washington County SART

The Washington County Sexual Assault Response Team (SART) provides support and justice to those affected by sexual violence. The organization's co-chairs approached Paul to facilitate a strategic thinking session to focus on organizational mission, vision, and goals. As a result of the two-hour meeting that Paul facilitated with ten SART members, participants strongly agreed (4.9 on a 5-point Likert Scale) that updating the organization's mission statement helped clarify their organization's role, creating a vision statement assisted them in understanding the general direction for their organization's future (4.9), and identifying and prioritizing goals increased their ability to identify issues and set priorities (5.0). Overall, participants evaluated Paul's facilitation as excellent (5.0) and one participant commented that the "facilitation was very helpful; necessary to our process, so appreciated!" As a next step identified during the planning session, Paul is currently working with SART members to develop and document the organization's structure and operating procedures.

### West Bend Business Improvement District

Paul was contacted by representatives from the West Bend Business Improvement District to provide facilitation that would assist their organization in being more strategic. After a preplanning meeting with board leadership and representatives from the City of West Bend, Paul designed and facilitated a 3-hour strategic planning session that was attended by five board members and two city staff.

As a result of this facilitation, 100% strongly agreed that creating a vision statement assisted them in understanding the general direction for the organization's future, 100% agreed or strongly agreed that identifying and prioritizing goals increased their ability to identify issues and set priorities, and 100% agreed or strongly agreed that discussing action plans increased their ability to focus goals into future actions. Overall, 100% of the participants evaluated Paul's facilitation as excellent. A participant commented that Paul was "friendly, professional; took information and was able to keep us focused and

on track.” Another participant commented that creating a vision statement “gave us strong purpose and direction.”

### West Bend Children’s Theatre

Paul was contacted by the president of the West Bend Children’s Theatre board to provide facilitation that would assist the board in being more strategic. As a result of this contact, Paul designed and facilitated a four-hour strategic planning session that was attended by seven board members.

As a result of this facilitation, 100% of the participants strongly agreed that reviewing the organization’s mission statement helped clarify their role as an organization, 100% strongly agreed that creating a vision statement assisted them in understanding the general direction for the organization’s future, 100% strongly agreed that identifying and prioritizing goals increased their ability to identify issues and set priorities, and 71% strongly agreed that discussing action plans increased their ability to focus goals into future actions. Overall, 100% of the participants evaluated Paul’s facilitation as excellent. A participant commented that “Paul was a great facilitator, who kept us on task. He is very knowledgeable and patient.” Another commented that they “feel rejuvenated and ready to go ‘head first’ into doing [their] best!”

Since the initial session, Paul facilitated three additional board meetings that resulted in volunteer position description outlines, strategies for volunteer recruitment, and identified assignments for individual board members to accomplish.

### Longer-Term Outcome Measurement of Organizational Development Programming

Paul conducted an end of year evaluation with eight of the ten organizations that he provided organizational development programming with in 2017. Organizations that received facilitation in November and December were not included in this evaluation. Longer-term outcomes were measured through an on-line survey. The survey responses indicated that as a result of Paul’s facilitation, 88% agreed that their organization has been strengthened, 88% agreed that their organization has been more strategic in fulfilling their mission and 88% agreed or strongly agreed that their organization has an increased capacity to address community issues and opportunities. One survey response included that “Paul’s leadership during the strategic planning process and his skillful guidance of our board helped us to create an exceptionally effective tool to help us guide our organization into the future.” Another response stated that “with Paul’s help and expertise our organization has gone from frustrated to highly functional. We could not be more grateful for Paul’s time and expertise.”

### National ESP Conference Presentation

Paul presented a juried selected concurrent break-out session entitled “Collaboration: The Key to Innovation in the Nonprofit Sector” at the 2017 National ESP Conference in Wilmington, NC. The presentation provided an overview of Paul’s original research conducted through a multi-agency collaboration that surveyed 90 Washington County nonprofits to determine their fiscal health and educational needs. Results were used to design and implement nine workshops over three years. Over the same time period, Paul provided direct organizational development programming to 29 organizations. After this educational response, follow-up surveys indicated that organizations were strengthened, became more strategic in fulfilling their mission, and had an increased capacity to address community issues and opportunities. The concurrent session provided insight on the process and tools used that achieved long-term outcomes and sparked a community conversation on nonprofit collaboration. Eight individuals attended the session and seven participants evaluated the session a 3.9 for knowledge gained, 4.1 on usefulness, and 5.0 on quality of presentation (5-point Likert Scale where 1

= lowest and 5 = highest). One participant commented through evaluation they “appreciate this, (and) will use some of this information at our annual conference.” Six participants requested copies of Paul’s research publication entitled “2015 Nonprofits & the Economy: Survey Results.” Additionally, Paul’s conference abstract scored in the top ten abstracts submitted to the National ESP Professional Development Committee and was awarded a free conference registration, a \$450 value. The presentation and handouts, including the “2015 Nonprofits & the Economy: Survey Results” publication, are available on the National ESP website at <http://espnational.org/en/29-resources/conference-presentations/398-2017-conference-concurrent-session-presentations>

## Local Government Education

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### City of West Bend

Paul and Family Living Educator Carol Bralich co-facilitated a Real Color’s training for 50 staff from five departments at the City of West Bend. 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.

Of the 49 participants that completed evaluations, 86% increased their ability to recognize their strengths and 84% increased their ability to recognize the strengths of others. 65% increased their ability to build rapport quickly with others. 86% increased their ability to understand how others process information and 65% increased their ability to modify their communication to connect with others. 90% evaluated Paul and Carol’s facilitation of the session as good or excellent. When asked how they will use what they learned, one participant commented that they will “take others personalities into consideration more when communicating” with them.

### Washington County

Since 2014, Paul and Carol have co-facilitated Real Colors workshops for Washington County employees. This is in response to Washington County government experiencing significant personnel changes and new county leadership requesting education and team-building among office staff. These goals align with the outcomes for Real Colors, which is an interactive workshop that teaches skills to understand human behavior and improve communication with others. In 2017, Paul and Carol co-facilitated three Real Colors workshops that were attended by 59 county employees. Fifty-seven employees completed end-of-session evaluations. As a result of attending the workshop, 95% increased their ability to recognize their strengths and 98% increased their ability to recognize the strengths of others. 81% increased their ability to build rapport quickly with others. 95% increased their ability to understand how others process information and 93% increased their ability to modify their communication to connect with others. 96% evaluated Paul and Carol’s facilitation of the session as good or excellent. When asked how they will use what they learned, one participant commented that “being aware of how others process information will help me to be patient and empathetic.” Since 2014, Paul and Carol have co-facilitated 21 workshops attended by 420 county employees. Additionally, Paul authored an article entitled “Using Real Colors to Transform Organizational Culture.” Using the experience of measuring short- and longer-term outcomes of the Real Colors workshops, the article highlights the importance for Extension educators to address organizational culture while they are building the organizational capacity of the groups (nonprofits, coalitions, and local governments) that they work with. This article was published by the Journal of Extension in December 2017 and is available at <https://www.joe.org/joe/2017december/tt12.php>.

## Joint Council of Extension Professional (JCEP) Conference Presentation

Paul and Carol co-presented a juried selected concurrent break-out session entitled “Transforming the Culture of County Government: Using Real Colors to Strengthen Staff Relationships” at the 2017 JCEP Conference. This session provided an overview of how Paul and Carol implemented an educational response to a local identified need. In less than 18 months, Washington County government experienced significant personnel changes in leadership and at the departmental level. As new leadership was hired, several contacted Paul to provide education and team-building among office staff. These goals align with the outcomes for Real Colors, which is an interactive workshop that teaches skills to understand human behavior and improve communication with others. During the presentation, Paul and Carol shared insights on how they implemented successful workshops for a large organization, designed tools to document and illustrate participant color scores, evaluated outcomes, measured organizational impact, and strengthened Extension’s relationship with new county leadership. The conference session was attended by 21 participants and 20 evaluated the session a 4.2 for knowledge gained, 4.7 on usefulness, and 4.7 on quality of presentation (5-point Likert Scale where 1 = lowest and 5 = highest).

## Engaged Scholarship

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### Refereed Publications:

Roback, P. (2017). Using Real Colors to Transform Organizational Culture. *Journal of Extension*, 55(6), Article 6TOT12. Available at: <https://www.joe.org/joe/2017december/tt12.php>

Roback, P. (2017). Extension Organizational Development Programming: Outcome Measurement through a Multi-Program Delivery Model. *Academic department paper of University of Wisconsin-Extension Department of Community Resource Development*. Available at: <https://cnred.ces.uwex.edu/publications/>

### Refereed Presentations:

Roback, P., Pratsch, S., Klink, J., & Rao, A. (2017). Creating a Shared Understanding of Organizational Development Extension Programming through Qualitative Data Analysis. *Presented at the American Evaluation Association’s 2017 Evaluation Conference*, Washington, D.C., November 8-11. Available at: <http://comm.eval.org/viewdocument/creating-a-shared-understanding-of>

Roback, P. (2017). Collaboration: The Key to Innovation in the Nonprofit Sector. *Presented at the 2017 ESP National Conference*, Wilmington, North Carolina, October 9-12. Available at: <http://espnational.org/en/29-resources/conference-presentations/398-2017-conference-concurrent-session-presentations>

## Educational Contacts

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Organizational Development	367
Local Government Education	120
Community Development	55
Total	542