

# 2018

## Accomplishment Report



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## Organizational Development

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 nonprofit surveys conducted by Paul in 2012, 2015, and 2017.



Sharing programming during UW-Extension Washington County's 100<sup>th</sup> Anniversary Open House in October 2018.

### Cedar Lakes Conservation Foundation

The Executive Director of the Cedar Lakes Conservation Foundation (CLCF) contacted Paul to facilitate a strategic planning process for their organization. The CLCF conserves the natural environment of the Cedar Lakes region.

After a preplanning meeting with the organization's leadership, Paul designed and facilitated two planning sessions with ten participants, which included board members and staff. Paul's facilitation included an organizational assessment; updated mission and vision statements; identified organizational values; identified organizational strengths, weaknesses, opportunities, and challenges; discussed key strategic issues; and identified next steps.

Through evaluation, 100% of participants agreed that updating the organization's mission statement helped clarify their role as an organization, 90% agreed that updating the vision statement assisted them in understanding the general direction for their organization's future, 100% agreed that discussing key strategic issues helped to clarify their direction as an organization, and 100% agreed that discussing action steps increased their ability to focus strategic issues into future actions. Overall, participants evaluated Paul's facilitation as excellent (4.9 on a 5-point Likert Scale).

One month later, the Executive Director reported that the board is very excited and energized to implement action steps from the planning process.

### Envision Greater Fond du Lac

Paul was contacted by the Community Development Educator at UW-Extension Fond du Lac County to work with Envision Greater Fond du Lac in strategic planning activities. Since the Fond du Lac Educator works with this organization on several projects, it was determined that it would be beneficial to have an outside person facilitate this process. Envision Greater Fond du Lac is a merged chamber of commerce and economic development corporation, whose mission to inspire their "community to work in partnership and cultivate a vibrant economic future."

After meeting with Envision's executive director, Paul designed and facilitated a three-hour strategic conversation with 19 board and staff members. The session covered nine strategic topics impacting the organization, allowed participant input through facilitated discussion, and prioritized which strategic

topics need immediate attention. After the session, the organization's staff will develop action plans based on the board's input from the session.

Sixteen participants completed evaluations. As a result of Paul's facilitation, 100% agreed that discussing key strategic issues helped to clarify their direction as an organization. One participant commented that "the issues were all relevant and matched needs of Envision" and another commented that "Paul allowed the group to steer the conversation. He kept us on task and on time." Overall, 19% of participants evaluated Paul's facilitation as good and 81% as excellent. One commented "excellent time management and keeping topics on track." Another commented "this is a critically important step for our organization. Thank you for helping us get started."



Participants prioritizing goals

### Holy Hill Area School District

Paul was contacted by the administrator of the Holy Hill Area School District to facilitate a process to develop a mission statement, vision statement, and slogan for the school district. This newly formed district is a result of merging the Friess Lake School District and the Richfield Joint School District No. 1.

Paul facilitated a community visioning session that engaged 17 participants. Comments were captured and then shared with a 13-person steering committee whose membership was solicited from the school board, parent teacher association, district staff, and the Richfield community. Paul facilitated two steering committee meetings that resulted in the development of a mission statement, vision statement, and slogan for the district.

Through evaluation of the community visioning session, one participant commented that they "appreciated the open group discussions and sharing. Gives a good sense of what others are thinking as well of sense we are all thinking/wanting the same things." Participants rated Paul's facilitation as excellent (4.6 on a 5-point Likert Scale). Through evaluation of the steering committee, 100% of participants agreed that discussing a mission statement helped clarify their role as an organization and 100% agreed that discussing organizational vision assisted them in identifying a general direction for their organization's future. Steering committee members rated Paul's facilitation as excellent (4.9 on a 5-point Likert Scale) and one participant commented "Wow! Paul helped us get to consensus quickly- he helped prompt conversation and set the stage for us to effectively dialogue."

### Kettle Moraine YMCA

The CEO of the Kettle Moraine YMCA contacted Paul to facilitate a series of listening sessions of Y members. The information gathered at these sessions will assist in the Y's strategic planning process, which will be facilitated by a consultant provided by Y-USA. This request is a follow-up to a similar process that Paul facilitated for the YMCA in 2014.

As a result of this contact, Paul facilitated three listening sessions where participants were asked to identify areas for improvement, strengths of the organization, opportunities for expansion into other communities, and ways in which the Y strengthens the foundations of the community. Due to low session participation (seven total participants) and the lack of diverse participants (100% age 65+ and White), it was impossible to draw any meaningful conclusions that would relate to the general population of YMCA members. However, Paul compiled the listening session information and

developed a report that shared insights that may relate to membership age 65+. Six participants completed end of session evaluations. As a result of Paul’s facilitation, 100% strongly agreed that the session provided an opportunity for thoughtful discussion, 100% strongly agreed that the session allowed them the opportunity to share their thoughts and opinions, and 100% evaluated Paul’s facilitation as good or excellent.

In addition to the listening session, the Y has created a survey asking the same questions as the listening session. The survey was distributed at all three branch locations and will allow an opportunity for additional feedback from their membership.

### LIFE OF HOPE

The Executive Director and Board President of LIFE OF HOPE (LOH) contacted Paul to facilitate a process that would allow their board and staff to discuss strategic issues impacting the organization and identify actions steps to move forward with. LOH’s mission is to reduce the number of suicide attempts thereby leading to a natural reduction in the lives lost to, and effected by, suicide.

Paul facilitated a 3-hour planning session with 18 participants, including staff and board members. Paul’s facilitation included an organizational assessment; updated mission and vision statements; identified organizational strengths, weaknesses, opportunities, and challenges; discussed key strategic issues; and identified next steps.

Through evaluation, 100% of participants indicated that discussing key strategic issues helped to clarify their direction as an organization and that discussing action steps increased their ability to focus strategic issues into future actions. One participant commented that “I feel like I now know why and how we’re going to get to the next step/level.” Overall, 100% participants evaluated Paul’s facilitation as excellent. One participant commented that Paul “did a great job of keeping us on task and keeping us engaged. [He] also let us discuss topics that we were passionate about.” Another commented that “Paul did a great job at capturing so much data from such a large outspoken group.”

### Rotary Club of West Bend

Leadership from the Rotary Club of West Bend contacted Paul to facilitate a process to develop an inspiring vision for the club’s future. A pre-planning meeting with club leadership resulted in Paul facilitating three strategic thinking sessions. At the first session, Paul presented demographic data highlighting the changes that have occurred in the community over the past several decades. At the second session, participants developed a vision statement for the club. At the third session, participants identified goals and steps to accomplish them. A total of forty-nine club members attended the three sessions. Club members are currently developing plans to accomplish the goals and have communicated their initial progress to Paul.



Participants selecting priorities

As a result of Paul’s facilitation, 87% of participants agreed that creating a vision statement assisted them in understanding the general direction for their organization’s future and 90% agreed that the process of identifying and prioritizing goals increased their ability to identify issues and set priorities. Overall, 97% of participants evaluated Paul’s facilitation as good or excellent. One participant commented that “this will be helpful as we plan the future of Rotary in West Bend.”

### Senior Citizen Activities, Inc.

The President of Senior Citizen Activities, Inc. (SCAI) contacted Paul to facilitate a strategic planning process for their organization. SCAI operates the West Bend Senior Center. Paul facilitated the organization's previous strategic planning process in 2008. Since then, the organization has a completely new board, new staff, and a new location for their programs. A pre-planning meeting with the organization's leadership resulted in Paul facilitating two strategic thinking sessions, which included a demographic overview, updating mission and vision statements, goal identification, and action planning. At the end of the process, Paul developed a planning report and the organization is working on implementing their plan.

As a result of Paul's facilitation, 90% agreed that updating the mission statement helped clarify their role as an organization, 100% agreed that creating a vision statement assisted them in understanding the general direction for their organization's future, 100% agreed that identifying goals increased their ability to identify issues and set priorities, and 90% agreed that discussing action plans increased their ability to identify their next steps for implementation. Overall, 100% of participants evaluated Paul's facilitation as good or excellent.

### The Threshold

The Executive Director of The Threshold contacted Paul to facilitate a process with the organization's leadership that would result in 3-4 goals for the organization to achieve over the next three years. The mission of The Threshold is to create opportunities for people with disabilities. As a result of this contact, Paul designed and facilitated a strategic thinking process that engaged 22 participants over three sessions.

Over the three sessions, Paul facilitated processes that identified organizational strengths, weaknesses, opportunities, and challenges; identified challenges and opportunities with current programs; identified and prioritized strategic goals; and refined the prioritized goals into SMART goal statements.

As a result of Paul's facilitation, 100% of participants agreed that the program discussion identified challenges, opportunities, and next steps for each program; 94% agreed that the process of identifying and prioritizing goals increased their ability to identify issues and set priorities; and 89% agreed that the process of creating goal statements increased their ability to clearly define strategic positions their organization desires to achieve. Overall, participants rated Paul's facilitation as excellent (4.6 on a 5-point Likert Scale). Since Paul's facilitation, the organization's board formally approved the goal statements.

### Washington County Historical Society

The Board President of the Washington County Historical Society (WCHS) contacted Paul to facilitate a process that would update the organization's mission and vision statements. As a result of a pre-planning meeting with WCHS board leadership, Paul agreed to facilitate two sessions with the organization's board and staff to update the organization's mission and vision statements, prioritize goals, and develop actions steps (how each goal will be accomplished). After the facilitated sessions, Paul developed a planning report and the board agreed that their next step is to have board committee meet and complete their action plans.

As a result of Paul's facilitation, 100% of participants agreed that updating the mission statement helped clarify their role as an organization, 83% agreed that updating an organizational vision assisted them in understanding the general direction for our organization's future, and 87% of participants agreed that

the process of identifying and prioritizing goals increased their ability to identify issues and set priorities. 100% evaluated Paul's facilitation as good or excellent. One participant commented that it "looked like we weren't going anywhere, but you pulled it back and got some results."

### Washington County Human Service Department

Washington County's Human Services Department (HSD) has merged the functions of the Behavioral Health Taskforce, the Community Options Program, and the Coordinated Services Team initiative. Each has traditionally provided citizen input in county programming. HSD staff contacted Paul to facilitate a process that would result in a new mission statement, vision statement, goals, and a name for the merged group.

Paul facilitated three 1.5-hour meetings that engaged 14 staff and community stakeholders, which resulted in the development of a mission statement, vision statement, and six goal statements. Additionally, the group agreed to the name Washington County Behavioral Health and Children Services Advisory Committee.

Evaluation results indicated that 100% of participants agreed that creating a mission statement helped clarify their role as a group, 100% agreed that creating a vision statement assisted them in understanding the general direction for their group's future, and 100% agreed that defining goals increased their understanding of the desired results of working together as a group. Overall, participants evaluated Paul's facilitation as excellent (4.6 on a 5-point Likert Scale) and one commented "Very impressive! (We) got a lot done in one and a half hours."

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

Paul conducted an end of year evaluation with eleven organizations that he provided organizational development programming, including ten that he worked with in 2018 and one that received programming in late 2017. The short-term outcome statement for the organization worked with in 2017 was included in his 2017 Accomplishment Report. Of the eleven surveys sent in 2018, ten responses were received.

The survey responses indicated that as a result of Paul's facilitation, 90% agreed that their organization has been strengthened, 90% agreed that their organization has been more strategic in fulfilling their mission, and 90% agreed or strongly agreed that their organization has an increased capacity to address community issues and opportunities. One response (10%) provided a "neutral" response to all three survey questions and the participant commented that the "responsibility of 'neutral' ranking falls more on the organization than on Paul." They also suggested that it would be helpful for Paul to follow-up with the organization to keep the plan moving forward.

When asked to provide feedback on Paul's overall performance, one participant commented that "Paul is an excellent facilitator and our community is very lucky to have him!" Another commented:

"I have had the privilege of working with Paul through several community organizations. He consistently displays a strong commitment to helping organizations of all sizes in achieving their goals. He is gifted with a calm strength that permits him to keep people on task without feeling rushed. He has a keen sense for when to stick to the program and when to flex with new information, not allowing us to stray too far from the mark while also not artificially forcing us into a schedule that no longer fits. Overall, Paul has been a delight to work with and I am thankful our community has the ability to benefit from this treasure."

## Community Development

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### Multi-State Brownfield Summit

Representatives from Washington County's Site Redevelopment Program contacted Paul to facilitate participant conversations at a Brownfield Summit. A brownfield is land where future use is affected by real or perceived environmental contamination. This summit included representatives from Washington County's program and participants from a brownfield program in Rock Falls, IL. After participants learned more about each other's programs and visited a redevelopment site, Paul facilitated a process that captured program best practices and identified strategies for building successful long-term brownfield programs.



Facilitating a Graphic Game Plan

Through evaluation, 80% of participants agreed that the session captured and synthesized best practices, 83% agreed that the session identified strategies to work toward an identified vision, and 100% agreed that the session allowed them the opportunity to share their ideas while also allowing others to share their thoughts. Participants rated Paul's facilitation as excellent (4.6 on a 5-point Likert-scale) and one participant commented that they were "skeptical over how useful this would be, but pleasantly surprised. Great job by Paul!"

Documenting and sharing the output from this Summit will allow other communities to learn from these nationally recognized programs that have leveraged limited resources to achieve impactful results. Additionally, the Brownfield Summit was an opportunity to display Washington County's strategic priority to "Economic Growth and Vitality" through the reuse of blighted properties.

### Staff Development through Real Colors

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Since 2014, Paul and Family Living Educator Carol Bralich have co-facilitated Real Colors workshops in response to organizations and local governments expressing a need for staff development in effective communication and team building. These goals align with the outcomes for Real Colors, which is a dynamic three-hour 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.

In 2018, workshops were facilitated for employees from several Washington County departments, employees from Waukesha County's Aging and Disability Resource Center, students from University of Wisconsin-Milwaukee's School of Nursing, and staff from Ozaukee County area nonprofits.

### Washington County Employees

Three workshops were facilitated for 61 county employees from various departments. End of workshop evaluations were received from 60 participants. As a result of attending the workshops, 100% increased their ability to recognize their strengths and 100% increased their ability to recognize 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 97% 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. When asked how they will use what they learned, one participant commented they “will think about what colors the people I am communicating with might be and be mindful to work together” and another commented that the workshop “will help in communicating with others and understanding how they approach things.”

Since 2014, 500 county employees have participated in Real Colors workshops. The longer-term outcomes of this work was published in the Journal of Extension in December 2017. Paul authored an article entitled “Using Real Colors to Transform Organizational Culture,” which is available at <https://www.joe.org/joe/2017december/tt12.php>.

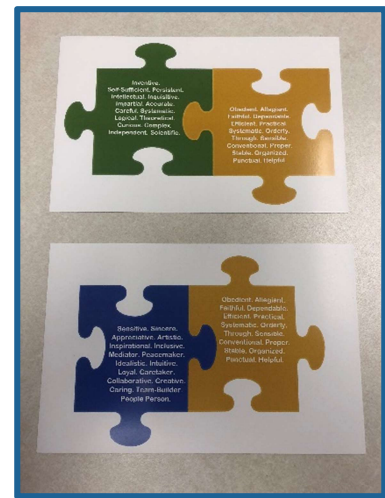
### UW-Milwaukee School of Nursing Students

The Washington Ozaukee Public Health Department annually hires interns from the UW-Milwaukee School of Nursing. For the second year in a row, interns have participated in the Real Colors workshop as a cohort. In 2018, 17 students and two instructors participated in the workshop. All 19 completed end of session evaluations. As a result of attending the workshops, 100% increased their ability to recognize their strengths and 100% increased their ability to recognize 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 100% 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. When asked how they will use what they learned, one participant commented “I will use it when communicating with my patients therapeutically. Also when communicating with peers or co-workers.” Another commented “I will take into account how each color thinks and operates and adjust my approach accordingly.”

### Waukesha County Aging and Disability Resource Center

Currently, the Waukesha County UW-Extension office does not have a trained Real Colors facilitator. As a result, Paul and Carol were contacted by the Director of Waukesha County’s Aging and Disability Resource Center to provide this training to their employees. Three workshops were provided to 72 participants. All participants completed end of session evaluations.

As a result of attending the workshops, 89% increased their ability to recognize their strengths and 93% increased their ability to recognize the strengths of others. 81% increased their ability to build rapport quickly with others. 90% increased their ability to understand how others process information and 86% increased their ability to modify their communication to connect with others. 97% 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 “I enjoyed learning the information about my co-workers and will adapt my communication style to be more sensitive to emotions.” Another commented “I will be mindful of everyone’s processing and communication style.”



Waukesha ADRC created graphic puzzle cards to remind others of their strengths

## Ozaukee Area Nonprofits

Currently, the Ozaukee County UW-Extension office does not have a trained Real Colors facilitator. As a result, Paul and Carol were contacted by the Ozaukee County Community Development Educator to facilitate a workshop for staff of Ozaukee nonprofits co-located in the Ozaukee Family Enrichment Center. A workshop was facilitated, which had 19 participants representing seven nonprofit organizations. All participants completed an end of session evaluation.

As a result of attending the workshops, 95% increased their ability to recognize their strengths and 89% increased their ability to recognize the strengths of others. 95% increased their ability to build rapport quickly with others. 90% increased their ability to understand how others process information and 84% 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. When asked how they will use what they learned, one participant commented "Will help in communicating with others and understanding how they approach things."

## Real Colors Compiled Evaluation Results

In 2018, a total of eight workshops were conducted with 173 participants. Of these participants, 170 completed end of session evaluations. As a result of attending the workshops, 95% increased their ability to recognize their strengths and 96% increased their ability to recognize the strengths of others. 89% increased their ability to build rapport quickly with others. 95% increased their ability to understand how others process information and 91% 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. When asked how they will use what they learned, one participant commented "to be more conscious of others communicative needs." Another also participated in workshop the prior year and commented "I now always try to work with other colors on projects. I know that I am perceived as not caring, so I try to incorporate more caring behavior in interactions."

## Educational Contacts

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Educational contacts may include multiple contacts with the same person and may include additional programs not included in the narrative sections of this report.

Organizational Development	556
Community Development	59
Staff Development	195
Total	810