Guidelines for Writing an Individual Plan of Work

# What is a plan of work?

A Plan of Work is a written document developed by Cooperative Extension Educators to serve as a guide for educational programming over a specific period of time. The plan should provide a snapshot of the situation that guides an overall work focus and highlights an educational process resulting in program outcomes and impacts. An individual Plan of Work should provide a plan for one or two major programs. One or more of the programs included in the individual plan of work may be a team plan involving other Extension professionals.

A Plan of Work should not attempt to cover everything you do. It should focus on priority programs and the elements and activities which make up those programs. Other routine or ongoing responsibilities need not be reflected in the program plan, but can be captured in the timeline or “other responsibilities” sections. It should be 4-6 pages long.

# Why should you write a plan of work?

### **To strengthen program quality**

The most important reason for writing a Plan of Work is to assist in program development and to enhance programming. Creating a plan facilitates the development of appropriate, realistic and manageable education programming which focuses on intended outcomes and which will be relevant and meaningful to those we serve. A good Plan of Work increases the likelihood that those intended outcomes will be realized.

### To communicate your plans with others

A current Plan of Work demonstrates to stakeholders, colleagues, partners and others that your work is based on needs and priorities. It clearly identifies intended outcomes that are logical and appropriate to those identified needs and priorities and expresses a commitment to regular re-examination of those issues, needs and priorities. It demonstrates thoughtful attention to the content and process most appropriate for the audiences and identifies the research base behind the programming. It also demonstrates the connection to University resources, specialists, and materials as part of the county/University partnership.

### To fulfill responsibilities to the programs and institutes

Plans of Work from across the state inform collective evaluation efforts, collective professional development needs, and other uses of state resources. The individual plan of work links you to the work of others across the state and gives an indication of the areas where cumulative impacts can be expected for or from Wisconsin citizens.

# What is included in a plan of work?

These plans include the following elements (and included as bold in the Template), framed with guiding questions:

* **Situation Statement -** The situation statement should succinctly describe the issue, problem, need and opportunity the program addresses.

Summarize relevant data and supporting research that identifies trends, needs and existing strengths in the county or state and supporting research.

* + What is the opportunity, need, problem or emerging issue?
  + How did you identify this as an opportunity/need/issue? What data, stakeholders, research informs this (think of available data as well as data that you, colleagues & partners have collected or need to collect)?
  + Identify Extension's unique contribution and likelihood that addressing this issue will make a difference.
  + Who cares whether this issue is resolved or not and how did you get their input? (stakeholder engagement)
  + What are the possible equity, diversity/multicultural and civil rights factors and implications related to the issue? For example, how do the stakes differ by population? What are the costs of not engaging in this situation? If you do engage, how might you work carefully as to not worsen any disparities or cause unintentional harm?
* **Target Audience(s):** 
  + Who is affected most by this situation that you plan to engage? Who could benefit from Extension educational programming that addresses this situation?
  + Which populations are currently underserved or not served by programming related to this situation? Consider and determine what intentional and special efforts are needed to reach out to those populations. Think through barriers you’ve faced in the past and ideas for overcoming them. Think of progress you’ve already made ensuring your programming is accessible, helpful and relevant to diverse stakeholders and how you plan to continue building on that this year.
* **Program Priorities:** Given the above issue/opportunity/need, what are 1-2 major programs, projects, initiatives you intend to use to address this?

List the major priorities and complete the following section for each of these program priority areas.

* **Program Outcomes** – The program outcomes should describe the intended result and anticipated changes in the target audience (individuals, groups and the community) and not the "actions" *you* will take. Changes include, but are not limited to, learning, actions (taken by target audiences), and modified conditions. You will have an opportunity to report outcomes associated with your Plan of Work in the Recording Results system (“outcome statements”).

Program outcomes should:

* Relate directly to the needs described in the Situation Statement section
* Reflect realistic expectations of what the program can accomplish within this plan (short-term, medium-term and/or long-term)
* Be measurable in ways which can be documented by the proposed Evaluation Plan
* Incorporate relevant collective/team outcomes, when appropriate
* Be stated in a manner that clearly communicates to internal and external stakeholders
* Build on work from previous years, when appropriate
* **Outputs**: **Anticipated Response and Planned Activities** –The response should describe an overall educational strategy designed to achieve the identified program objectives/outcomes. Activities should be linked to desired results through the choice of program, research upon which the program is based, and population to be served.

For example consider with whom and where you plan to build, foster and nurture relationships that may help you reach underserved populations and the outcomes you list. Also specify why these educational activities will work, drawing on research evidence or practical experience.

* + Identify the target audience(s), including new and diverse audiences.
  + Describe an overall program strategy that includes a variety of approaches and activities appropriate for the people involved and the program objectives/outcomes.
  + Identify your role - you can also include the resulting actions of volunteers, key collaborators, etc.
  + Note plans for networking, utilization of state team resources, educational material development and public information dissemination.
  + What promotional tools will you use to maximize the reach and impact of your programming in the coming year (e.g. online marketing, social media, direct mail, etc.)?
* **Evaluation Plan** – The evaluation plan should identify specific evaluation method and strategies that will be implemented to answer key questions about your programming efforts. How will you know if the program efforts are successful at meeting their outcomes? What evidence will you have? How will you know what worked and what didn’t? What might you keep, change, drop moving forward? Please plan to do evaluation for the sake of both accountability AND your own learning/growth purposes. Improving programs over time is important.

Not all events or educational programs need to be evaluated. However, a priority program should have a sufficient evaluation data to provide evidence of progress toward meeting intended outcomes.

Evaluation plan includes the following when applicable:

* Guiding (big-picture) question(s) the evaluation seeks to answer
* Has a clear purpose for intended evaluation user’s needs (funders, program improvement, stakeholder engagement, etc.)
* Engagement of stakeholders in evaluation planning, implementation, analysis and/or use of results
* Collection of participation demographics for Recording Results
* Multiple sources of data from a variety of methods
* Is appropriate to the specific audience (consideration for literacy, language, ADA, culture, etc.)
* Builds on existing evaluation systems, contributes to the area, state, institute planning and reporting
* Follows appropriate Human Subjects Protection
* **Professional Development Needs** – Cooperative Extension is dedicated to assuring the professional development (PD) of its staff. Extension professionals are responsible for designing a PD plan to enable them to effectively address priority programs and emerging issues. This includes educational experiences designed to enhance professional competencies and knowledge in your programming area. This may be different from the PD section of your performance review documentation in the sense that it’s focused on PD that’s directly related to your planned priority programs.

These self-directed professional improvement opportunities should be based on solid research and may include UW-Extension conferences, continuing education opportunities offered by other institutions and/or organizations, Lynda.com, research journals, etc.

This section should describe specific professional development needs, skills, and/or capabilities related to the priority program and/or emerging issue and then describe the potential benefits anticipated from that training.

* **Timeframe:** An annual plan is required and should cover a calendar year (Jan-Dec). There will be some situations where it makes more sense to write a two-year plan. It is up to you, your coach and supervisor to scope out the timeframe for the plan. Many long-term objectives require a multiyear approach and colleagues are encourage to think through a long-term planning process. If you choose to write a multiyear plan, the annual timeframe table will help provide specific detail to the general direction outlined in a multi-year effort.

You are encouraged to set quarterly goals for the major components of your plans and include those in the table at the end of the Plan of Work.

A guideline to use while thinking through allocating your time is to spend ~50% or more of your time on the priority programs outlined in this plan. That work, plus other ongoing duties and professional development should not total more than ~80-90% of your time to allow for emerging efforts.

Extension Educator Plan of Work Template

**Name:**

**Title:**

**Home office:**

**Timeframe covered by the plan:** *(default for 2018 is roughly the calendar year; but could include multiyear planning)*

**Affiliate Team/Center/Program** (*if appropriate*)

*Note: Your priority area may or may not connect to a current team/center/program. You are encouraged to reference these resources when appropriate.*

What

Why

**Situation Statement** *(it’s okay to list two different situation statements)*

**Program Priority #1 & Target Audience(s):**

**Program Priority #2 & Target Audience(s):**

**Program Priority #1 Outcomes:**

Long Term Condition Change:

Goals

Intended Changes in Knowledge, Attitude, Motivation, and Behavior (Short and Medium Term Outcomes):

*Specify target audience for each outcome; add more as needed*

*Feel free to instead attach a logic model or other visual depiction of your activities, outcomes and how they are connected.*

#1

#2

#3

**Program Priority #1 Response/Planned Activities** (Outputs)

List the educational activities (facilitation, relationship building, trainings, workshops, etc.) and/or products (curriculum, media, resources) that you expect to deliver this year, along with intended audiences for each.

What you need

How will you know and learn?

How you plan

to get there

**Program Priority #1 Evaluation Plan** (Additional information to establish the context, document/assess implementation, and/or measure outcomes)

*\*Repeat program outcomes, response/outputs and evaluation plans for a second priority program*

**Professional Development Needs:**

**Timeframe – Annual**

It can be useful to capture major planned activities (planning, education, evaluation, etc.) for each of your plans on a calendar format.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Program Priority 1 – Activities** | **Program Priority 2 – Activities** | **Other Activities/Major Responsibilities** | **Professional Development** |
| **Winter** |  |  |  |  |
| **Spring** |  |  |  |  |
| **Summer** |  |  |  |  |
| **Fall** |  |  |  |  |