

# Plan of Work Guidance



Extension  
UNIVERSITY OF WISCONSIN-MADISON

## FOR EDUCATORS & SPECIALISTS

**A** plan of work is a document that serves as a guide for program planning, implementation, and evaluation over a specific period of time. Programming is a general term that includes how Extension professionals respond to local and statewide issues. This includes educational, outreach, or research-based responses to issues. A plan of work is not about performance accountability. Rather, it is a tool to improve program planning and communication of what you are doing that demonstrates Extension's mission and [Purpose, Vision and Values](#).

### Why write a plan of work?

#### To strengthen our work

The most important reason for writing a plan of work is to facilitate the development of programming focused on outcomes relevant to those we aim to serve. A good plan of work increases the likelihood that intended outcomes will be realized. Taking time to document your planning allows you to utilize the content for other purposes.

#### To inform and align with collective efforts

Plans of work are both a way to inform statewide efforts and to align what you're doing with program and Institute priorities.

#### To demonstrate best practice in program design

A current plan of work demonstrates to stakeholders, colleagues, partners, and others that your work is based on the identification of unmet needs and priorities appropriate to the intended audience, and is connected or adds to the research base.



*An individual plan of work should not attempt to cover everything you do. It should concisely focus on major programs, projects, or initiatives.*

#### What is included in a plan of work?

A plan of work should not attempt to cover everything you do; it ideally provides an overview of major efforts, and for educators this is about 60 to 80% of your work. A plan ideally provides a brief statement of the situation and context that guides the programming focus and highlights an educational, outreach, or research process with a specific audience resulting in program outcomes and impacts. Additional sections include an evaluation plan and a section to communicate program-related professional development needs.

#### How does an individual plan of work overlap with a program plan of work?

An individual's work becomes part of broader program planning where a priority issue in a county or specialist's research focus overlaps with a regional or statewide issue.

The program plan of work supports individual plans of work by guiding the content of the situation statement, informing the development of programmatic outcomes and approaches to address equity, and providing opportunities to engage in statewide program efforts and professional development.

#### Tools and resources

- Read and use [program plan\(s\) of work](#) as a guide and source of reference.
- Your Institute and program manager have resources to help you write your plan of work (e.g., examples, program plan). Program teams and experienced colleagues can provide valuable perspectives. Institute-based evaluators can also support you in developing your plan. For support addressing equity and inclusion in your plan, consider arranging a [coaching and consultation session](#) with the Office of Access, Inclusion, and Compliance.
- A [Word template](#) is available for drafting your initial work.

# 1

## Getting started

### Provide basic information about your plan of work.

- Include a brief but descriptive **title** that would communicate what is included. Examples might include addressing farm viability, building capacity of entrepreneurs from underrepresented communities, and financial security programming, or others.
- Select your home office(s).
- You will be asked to select one or more Institutes from the drop-down menu in the [Planning and Reporting Portal](#). Once an Institute is selected, you will be able to select an educational program(s), branded program, or reserve.

# 2

## Why

### Craft your situation statement.

A **situation statement** is a concise summary of relevant data sources that describes the need/opportunity in the geography you serve. Data includes existing & new data that you and/or partners have collected for the purpose of developing needed and helpful programming. Provide the sources of your information without adding formal citations.

The recommended length is a few paragraphs, with the purpose being to set the stage for the rest of your plan. The following sections are in response to the situation.

#### Consider:

- How did you determine who is most affected and how does this relate to your target audience in the next section?
- How does this align with Institute/program priorities?

#### Additional resources:

- [Needs Assessment training](#)
- [Demographic Data Resources](#) created by the Applied Population Laboratory (APL) & Extension **Youth, Family, Health and Community Development** leaders and specialists.
  - » [GetFacts](#)—the APL’s interactive data portal featuring infographics.
- [Data Sources for Understanding the Situation and Context in Agriculture \(2021\)](#)
- [Summary of Findings](#) from the Division of Extension’s 2018 statewide situational analysis.
- Access data resources that were identified and curated during Extension’s 2018 statewide situational analysis [here](#). Filter the columns to easily find resources relevant to your work.

# 3

## Who

### Identify your target audience.

List the participants or users of your program or research that you intend to reach/impact.

#### Consider:

- Does your target audience include groups who are underserved? Examples could include persons with diverse abilities, persons from racially/ethnically minoritized communities, members of sovereign Native Nations, or justice-involved families.
- Who is affected by the situation?
- Who are important stakeholders?



*Remember to pull relevant information from your program’s plan of work if it aligns with your individual plan of work.*

# 4

## Outcomes

Are you stumped on outcomes? Check your program plan of work for priorities.

### Describe your program outcomes.

- Outcomes include but are not limited to changes in learning, behaviors, and conditions. Programming efforts that expand access to groups who are underserved are also considered an outcome. New knowledge generation would be a type of outcome. They also include direct/immediate results and longer-term outcomes that may build on initial outcomes.
- Describe program outcomes that can be achieved this year and beyond. It may be helpful to distinguish what you believe can be achieved this year from longer-term outcomes.
- Program outcomes should describe the intended results and anticipated changes that will result from your program.
- Outcomes should be framed as the changes in your participants and stakeholders affected by your program. If you have several target audiences, you can specify which outcomes apply to which. This will help in evaluation planning.

#### Additional resources:

- [Enhancing Program Performance with Logic Models](#) (see sections 2 and 3 for help with writing outcomes).
- Verbs that can describe learning outcomes (Bloom’s Taxonomy) in [English](#) and [Spanish](#).

# 5

## How you plan to get there

### Describe your action plan.

- List the educational, outreach, or research activities and/or products that you plan to deliver over the next year for/with your target audience(s). These should be driven by a combination of theory, best practice, experience, and stakeholder engagement. If these activities are successfully completed, the logic is that the short-term outcomes will be realized, which are in response to the situation.
- For at least a few activities, make them specific and measurable (e.g., How will you market or disseminate your program and/or product? Who is the specific target audience? How many times do you plan to offer this training?).
- A calendar is included in the [Word template](#) to create an implementation plan for your response. This is an optional component that some have found useful. You do not have to include the calendar in your plan of work that you submit.

#### Additional resource:

- See [this article’s section on “Converting SMART goals to SMARTIE goals”](#) for help writing action plan statements that center inclusion and equity.

### What are your professional development needs?

Reflecting on your plan, are there additional skills, competencies, or professional development that you need in order to implement your plan? Focus on what you hope to get from this professional development rather than listing event names/details.



*Examples of educational, outreach, and research activities and/or products*

- facilitation
- building relationships
- trainings
- workshops
- experiments
- studies
- curriculum
- media
- resources
- models
- tools

# 6

## How you will know and learn

### Describe your evaluation plan.

- Extension evaluations seek to answer:
  - » To what extent did we reach our intended outcomes?
  - » What contributed to achieving these changes and why were some intended changes not realized?
  - » With which target audiences are our programs working and not working?
  - » How can we improve our programs over time?
- Which of the previous evaluation questions you are trying to answer this year? What are your ideas on how to answer those questions? Remember to think about process evaluation, not just knowledge and behavior change.
- What might help you iterate your programming?



## Additional resources

### To consider while developing programs:

- [Incorporating Theory into Extension Program Design](#) (pages 1-11 are most relevant) from University of Maryland Extension.
- [Community Toolbox](#) from University of Kansas—includes tips and tools around community assessment, planning, intervention, etc.
- [Special journal issue on the Extension Program Development Model](#)—for those interested in delving into more reading.

### Fitting it all together

- [Logic Model template](#)—A logic model can be a helpful tool to visualize various components of your plan of work, understand how the different pieces fit together, and help guide evaluation.

Submit your plan of work online through the Planning and Reporting Portal:  
[wices.knack.com/recording#home](http://wices.knack.com/recording#home)

