

*File
4# Plans of work*

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CALIFORNIA

Agricultural Extension Service

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PLANNING AND REPORTING EXTENSION WORK

I. THE PROGRAM PLANNING PROCESS

A. What is Program Planning?

Program planning can be defined generally as the process of determining the present situation, the changes that should be made, and the general means for facilitating such changes.

It is a coordinated effort of all the county Extension staff and local people to arrive at the important problems and long-range objectives in a county. It ensures continuity of Extension work, and it coordinates the efforts of Extension staff in maintaining a total balanced county Extension program with emphasis on the important problems.

The program planning process results in a long-range program plan which, to be most effective, should be written down and used as a basis for individual staff member's efforts in his or her area of work. A written program plan provides a guide to action in acquiring knowledge and in Extension teaching in the different phases of the program. It provides a basis for annual Plans of Work to accomplish the long-range objectives that have been identified in the program planning process.

A program plan should not be confused with the annual Plan of Work. The program plan, which has been developed by a program projection or program analysis, is the long-range plan for Extension work in the county. It is the basis for each individual's selection of problems he will give his major attention in annual Plans of Work; problems whose solutions will contribute to accomplishment of the county's long range objectives.

B. Developing a Program Plan

If this has not been done recently, it is strongly suggested that each county carry out some sort of long-range planning involving local people and the entire staff, to establish long-range objectives for Extension in the county.

Program projection, or long-range planning, is done as follows:

1. County staff members develop background information which describes the resources used and characteristics of agriculture in the county as a whole. Extension economists and subject matter specialists will assist in this.
2. Staff members, with the assistance of local farm and home leaders, analyze background information and project the future of agriculture, 4-H, and home economics and their problems for the county as a whole and for major commodities. Projections should be made at least 5 years in the future, and could be made as far as 10 to 20 years ahead.

3. With basic data and projections, the county staff can analyze the future for Extension in the county. It determines program objectives, necessary changes in teaching techniques, future staff requirements, physical facilities needed, etc.
4. The staff puts the long range plan and objectives into a written program plan. Use the program projection results to inform county government officials, farm people, and the general public as to agriculture's place in the county, its future and problems. Use the program plan as a basis for annual Plans of Work.

C. Concepts of Program Planning

1. The Extension program is based on the needs of people.
2. The Extension program is developed cooperatively among the Extension staff and local people.
3. Program planning takes time, but time is not "spent" in program planning -- it is "invested." Each staff member should budget a certain amount of time to invest in planning his program.
4. The Extension program is based upon clearly established objectives.
5. Extension's job is education for action. A well-developed program plan is a prerequisite to effective teaching. Planning the program is an important educational process in itself, both to the Extension staff and people involved. The program plan should specify teaching objectives and the learning experiences which will bring about desired changes in understanding, skills, attitudes, and practices.
6. Extension program planning is a continuous process.
7. Program planning involves all available resources, including local agencies, Extension specialists, and administrative staff.
8. The program planning process also is an evaluating process -- of program methods, of program content, of progress made by people, of current status. Systematic evaluating procedures should be built into the program planning process.
9. The success of Extension in California rests almost entirely with the county staff. An effective county program is the key to success. The function of the state office staff is to assist the county staff in making the program effective.
10. A written county Extension program plan is necessary to give long-term direction to the program and to meet the needs of people in the county.
11. Annual Plans of Work are written on major phases of work to be undertaken during the year to move toward recognized long-range program objectives. Plans should be based on known facts, past problems, and trends.

II. GUIDELINES FOR PREPARING COUNTY PLANS OF WORK AND REPORTS

A. The Plan of Work

1. Determine the major problems that will be given emphasis during the coming year. Only the major problems or needs should be written up as Plan of Work. Probably only 50 to 60 percent of your time should be planned in detail. In fields of work involving more than one staff member, a joint determination may be made. Determination of these problems is based on the long-range program plan and objectives for the county, by meetings with local leaders, consultations with the County Director, Extension specialists, and by other means.
2. Use a separate Plan of Work form for each of the major problems that will be written up as a Plan of Work. All the plans taken together should represent your major efforts during the coming year. There is no premium on numbers of Plans of Work. Some of the criteria are:
 - a. Do the written plans represent a significant program of work for the staff member?
 - b. Are the major problems in this field in the county being considered?
 - c. Do the plans allow time for essential routine Extension work and emergencies?
 - d. Do the Plans of Work tie in to the long-range Extension program plan for the county?
3. In the spaces provided in the upper left-hand corner of the Plan of Work form, place the primary field of work. Also, write in the components and commodity cross-reference subjects where applicable.

For the primary fields of work and components refer to the standard guide which is provided for this purpose. This identification by subject matter areas will facilitate filing and classification by both county and specialist staff.

4. Number of copies required:
 - a. Send two copies of the Plan of Work to each specialist concerned with the subject of the plan. For example, a plan dealing with cotton fertility should be referred to both the cotton specialist and a specialist in soil fertility. If you have not been working directly with any particular specialist, refer to the guide for procedure to follow.
 - b. Send one copy to the Assistant State Director concerned.
 - c. Send one copy to the Director.

- d. Send one copy to cooperating experiment station staff, if any.
- e. Prepare copies as needed for the county office files and for cooperating growers, etc.
5. Signatures:
 - a. Signatures should be secured on Plan of Work forms only when the staff member and County Director feel that a formal understanding or commitment is necessary. Plans requiring signatures should be sent to the specialist concerned well in advance of the time the plan is to take effect, and should be accompanied by a covering letter.
6. Plans of Work may be submitted any time during the year that work is planned. Each winter, however, Plans of Work to be carried on during the coming year will be called for if not submitted already.
7. Plans of Work continued from the preceding year should include new information, such as annual goals and teaching plan (methods). Those parts of the plan that are the same as the previous one need not be completed again. However, even where no changes are to be made, a Plan of Work form should be prepared showing the status of the project and distributed to state staff who received copies of the previous plan.
8. In preparing Plans of Work, we need to remind ourselves that our job is education, and all plans should include teaching objectives and learning experiences and methods for extending information to our clientele.
9. If the Plan of Work involves a field or laboratory experiment, the form "Plan of Work Supplement for Field or Laboratory Experiments" should be completed for each separate experiment. After the form has been co-signed by the county staff member(s) involved and the appropriate specialist(s), it should be attached to or filed with the Plan of Work of which it is a part. However, a supplement may be submitted at any time. The specialist's signature indicates in effect that he is aware of the experiment and, in his opinion, the experiment is well designed and statistically sound. Normally, one specialist and one or more advisors will sign the form after any desired corrections are made. Completion of the form and signature(s) of specialist(s) should be in advance of beginning of the experiment. Copies should be retained by the specialist and the advisors concerned. If the experiment involves analysis at one of the Extension Service regional laboratories, a copy of the form should be sent to the appropriate Extension Technologist in charge of the laboratory. If the experiment requires assistance from the Biometrician, he should be consulted prior to final completion of the form and should receive a copy of the final form.

B. The Report of Work

1. Reports of Work accomplished during the year are necessary to inform our various publics, to evaluate progress made toward long-range objectives, and for permanent records in the state and county office of Extension accomplishments.

2. A Report of Work should be prepared for major accomplishments during the year. A report should be submitted for each Plan of Work which has been submitted, and for major accomplishments not previously planned. In the latter case, the report should be accompanied by a Plan of Work. Subject of the report should correspond exactly with the Plan of Work.
3. A Report of Work should be submitted at any time during the year as work is completed. However, each fall, accomplishments for the preceding calendar year will be called for if not submitted already.
4. Specialists may, in some cases, need a more complete summary of work carried on in certain statewide activities, such as DHIA, cost data sheets, etc. In these cases, the specialist will ask for such information directly from the county staff member involved.
5. In preparing Reports of Work (including reports of test plots) mention should be made of educational as well as technical procedures and results obtained. How was the information extended? What use did growers make of the information? What impact did it have on agriculture and the economy of the county?
6. If a field or laboratory experiment is involved, the results and conclusions of the experiment should be written up and attached to or filed with the Report of Work of which it is a part. For convenience and to minimize duplication of effort, it is useful to append write-ups of applied research trials which may have already been prepared. These may be stapled to the Report of Work and referred to as necessary in the Results and Conclusions sections. You are reminded of the publications review procedure for publishing new information.
7. As work is completed and a report written, it is suggested that the report be filed with the written Plan of Work by subject matter content. This places a complete story of the work in one place.
8. Other suggested uses of the Report of Work are:
 - a. Send to grower cooperators and growers with a specific interest.
 - b. Use as a basis for commodity letters.
 - c. Place in a reference file.
 - d. Assemble into a complete story of the work accomplished in the county during the year. This type of report would have great value as a permanent record. It will be of interest also to certain officials and agricultural leaders. If a more "popular" report is desired, the report forms will serve as an excellent base for this type of report.

9. Number of copies required:

- a. Send two copies of the Report of Work to each specialist concerned with the subject of the report. For example, a report dealing with cotton fertility should be referred to both the cotton specialist and a specialist in soil fertility. If you have not been working directly with any particular specialist, refer to the guide for procedure to follow.
 - b. Send one copy to the Assistant State Director concerned.
 - c. Send one copy to the Director.
 - d. Send one copy to cooperating experiment station staff.
 - e. Prepare copies as needed for the county office files and for cooperating growers, etc.
10. Where work planned to be completed during the year was not carried out, a Report of Work form should be prepared indicating the status of the project, and distributed to persons who received copies of the Plan of Work.

P R O G R A M P L A N N I N G

A CONTINUOUS PROCESS

