

# PD&E Tips – Reports & Submitting Plans

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*"The person who makes a success of living is the one who see his goal steadily and aims for it unswervingly. That is dedication.*

-Cecil B. DeMille

Do you have an idea for a "Tip"? Email to: [Lisa Townson](mailto:Lisa.Townson)

## Important Planning & Reporting Dates:

**October 1, 2006**  
Individual POW submitted via on-line system

TERS updated (Oct 1, 2005 – Sept 30, 2006)

[Planning Guide Worksheet for Days Allocated to Program Leader](#)

**November 1, 2006**  
Annual Accomplishment Report – FY '06 Due

Key Theme Reporting Data due to Lead Staff

## Submitting Plans

### New On-line Planning & Reporting System

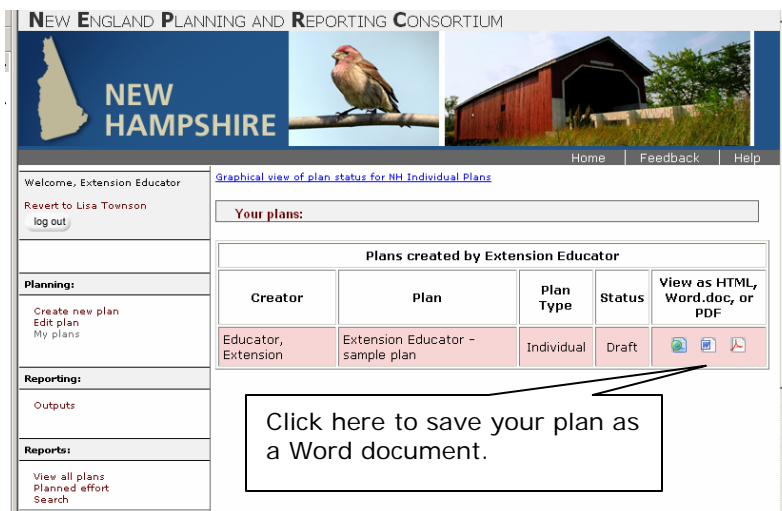





Because the new on-line planning and reporting system is a multi-state effort, plans are visible to other staff in Massachusetts, Vermont, and Maine. This feature was designed to encourage sharing of program ideas and hopefully facilitate future multi-state efforts as well. Staff from other states can view your plan after it has been approved and becomes a final plan. You can access final plans from other states after logging into the system and clicking on "View all Plans". This is found on the left side of your screen under the heading, **Reports**.

### Reports – multiple formats

There are several formats you can save and/or print your individual plan of work in using the on-line planning and reporting system. You can print it directly from your web browser, save it as a word document, or create a pdf directly from the system. From the menu on the left side of your screen – under **Plans**, click on "My Plans" and any plans you have created or act as a reviewer for will appear on your screen.

If you click on the Word icon, you will be prompted to save the document. Once you've saved it you can open and edit it just as you would any other. You can edit this to use with your advisory committee, in performance management documents, grant reports, etc.



Creator	Plan	Plan Type	Status	View as HTML, Word.doc, or PDF
Educator, Extension	Extension Educator - sample plan	Individual	Draft	  



### Performance Management Documents:

Although the new on-line system doesn't automatically populate information you need for your performance management documentation, you can easily cut and paste the data after you've saved your plan as a word document.

**\*\*Note – to follow links in this (and other pdf documents), click on the hypertext and if you are asked to enter a username and password, it is our CES Intranet log-in (cesuser, coopext)**

## Evaluation Overview

One of the first screens you see when beginning your plan included a text box for an Evaluation Overview. My advice has been to leave this box blank until the end and go back and update it once you've completed your plan. It can be found by clicking on "Plan Information" on the left side of your screen. The evaluation overview should contain information about **your role (individually)** in program evaluation. As an example, if you are a state specialist responsible for developing and distributing tools to collect end-of-session data, you should indicate that. If your role as a county educator is to use an existing tool to collect data while on farm visits, then this is what you should put in this box.

## Plan Review and Submitting

There is a useful summary of your plan that you can review prior to submitting it to your program leader or supervisory for review. Look at the menu on the left of your screen, under **Plan**, then Summary and click on "Plan Review". A summary of your plan will come up, indicating how many outcomes, days planned, etc.

Typically a red dot means something is not complete or incorrect, with a few notable exceptions:

You may have no information in plan overview.

Staff Development and Administrative time will have outcomes with no indicators. Click on Show Details to make sure the outcomes with no indicators are one of these. If they are programmatic outcomes with no indicators, you should go back and select indicators.

This is a summary of what programs you are basing your plan on – typically there will be four – administrative, individual staff professional development, their program area and one interdisciplinary team.

Staff Development and Administrative outputs will have no associated indicators. All other outputs should have at least one impact indicator associated with it.

When you are ready to submit your plan, click here.

**Plan Review: Extension Educator - sample plan (DRAFT)**

- ① Covers the years: 2007,2008,2009,2010,2011 (Edit)
- ① Has 1 parent plan: (Edit)
  - ① Agricultural Resources
- ① Has no information on plan overview. (Edit)
- ① Has 20 outcomes.
  - ① Condition: 6
  - ① Action: 9
  - ① Learning: 5
- ① 4 outcomes have no indicators. Show details | (Add indicator)
- ① Indicators (6 total; 4 occur once; 2 occur multiple times)
  - ① 6 originate in other plans.
  - ① 0 originate in this plan.
- ① Has 4 Programs. (Add/Edit Program)
  - ① Administrative Time
    - ① Has 4 outputs brought in from other plans.
    - ① Has 0 outputs that start in this plan.
    - ① Has 4 outputs with no associated indicators.
      - ① Attend Staff Meetings
      - ① Planning and Reporting
      - ① Promotion Committee Work
      - ① Miscellaneous administrative work
    - ① Has 4 outputs with no associated audience.
      - ① Attend Staff Meetings
      - ① Planning and Reporting
      - ① Promotion Committee Work
      - ① Miscellaneous administrative work
  - ① Agricultural Resources
    - ① Has 3 outputs brought in from other plans.
    - ① Has 0 outputs that start in this plan.
  - ① Civic Participation & Leadership
    - ① Has 3 outputs brought in from other plans.
    - ① Has 0 outputs that start in this plan.
  - ① Individual Staff Professional Development Plans
    - ① Has 1 output brought in from other plans.
    - ① Has 0 outputs that start in this plan.
    - ① Has 1 output with no associated indicators.
      - ① Professional development
    - ① Has 1 output with no associated audience.
      - ① Professional development

① Total numbers for plan:

	2007	2008	2009	2010	2011
Days	203	203	203	203	203
Grant Days	0	0	0	0	0
Integrated Research	0	0	0	0	0
Multistate	0	0	0	0	0
Seasonal Staff Days	0	0	0	0	0
Staff Days	0	0	0	0	0

[Submit plan for review](#)

## Next PD&E Tip --- Key Theme Reporting – October 9, 2006