Creating, Copying & Updating an Action Plan in PEARs – Agents and Educators

**Rationale and Directions:** Once a year, it is required that full-time agents and educators (except Parent & Family Resource Coordinators) submit at least four individual action plans for the upcoming year.

- Copying and/or Adding four Action Plans into PEARs is expected by January 15.
- Action Plans (your programming) should be based on relevant data, research, program area specific goals, county needs, and/or feedback from past programming or constituents (such as your Advisory Board).
- **One Action Plan needs to be a signature program and one needs to be in 4-H youth development***. The other two can be any type of plan, including: signature, core, pilot, county-specific, 4-H youth development, etc. For new employees, please visit with your district director/supervisor, mentor and peers to get started so we can guide you along this process.

**NOTE:** FNP & EFNEP employees, please refer to the guidance from Megan (coming soon). FCW/FNP agents, please use this version, but note that one of your Action Plans should be on Policy Systems and Environmental Change (PSE).

There are a couple changes from last year, so please use this document as you enter your plans.

### Finding an Action Plan in the System to Copy

1. Log into PEARs: https://pears.oeie.org/ click Plan (top menu bar), then Action Plans

2. Click on the **Filter Button** and decide what you want to see. For example:
   - To view all the state plans for a program area, in the filter menu:
     - Under **User field**, remove your name
     - Under **Level Field**, choose “State/PFT”
     - Under **Program Area** field, change the status to “Approved” and click Apply. (This replaces the program team menu).

3. Open the plan to review. If you would like to do this program, click the button in the upper right hand corner: Copy Local Plan to... and then click My Individual Plan.

4. Then update the title following the NEW standard naming convention. You will see: main program area> name of Program (Copy). Delete (Copy) and add county name > your last name.

   Examples:
   - FCW, Solid Finances, Cass, Ussatis
   - ANR, Weed Management/Resistance, Towner, Berg
   - 4-H, Science, Mercer, Kemmet

5. Add Unit (the county where the program will be provided). You need to press the Save and Continue button at the bottom of the page. Review each remaining steps (2-4). For Steps 2-3, click Save and Continue at the end of the pages. Press Save at the end of Step 4 to add this as one of your Action Plans.
Adding Your Own Action Plan (when not copying an existing plan)

1. Log into PEARS: https://pears.oeie.org/ click Plan (top menu bar), then Action Plans

2. Click the Add button

3. Follow the remaining directions to complete your plan.

**PEARS Action Plan –STEP 1 (first tab)**

**Title:** Follow the NEW standard naming convention.

Individual/Plans: When copying a state plan to an individual plan, change the name to include: main program area > name of program > followed by county name > your last name. Please delete “(Copy).”

Examples:
- FCW, Solid Finances, Cass, Ussatis
- ANR, Weed Management/Resistance, Towner, Berg
- 4-H, Science, Mercer, Kemmet

**Reporting Period:** Currently, PEARS utilizes the federal fiscal year. Select the federal year that includes NDSU’s upcoming calendar year. As an example, select 2018-2019 for the NDSU 2019 calendar year.

**Level:** Choices are “State/PFT” or “Individual”. Select “Individual”.

**Type:** Choices depend on your response to the previous question above, Level.

As an individual agent, you should choose “Individual” at Level and designate your individual plan as “Local” or “Pilot”. Most of your plans will be “Local” in nature if it is an established program and/or copied from a State/PFT plan. Use “Pilot” only if the initiative is new and there is no State/PFT pilot program currently available.

**Program areas:** Select the program area(s) most appropriate for this plan. As an example, if you have a Junior Master Gardener program, you could list both the Horticulture and Forestry team and the 4-H Youth Development team. **NOTE:** To add more than one program area, click again in the entry box and the drop down menu will re-appear.

**Unit:** Select the county the program will be delivered.

**Other contacts:** This is optional. You can leave it as it is, or add other names if you want them to have editing privileges in the future or the ability to copy to their own individual plan.

**Grand Challenges:** One of the new terms included within PEARS is “Grand Challenges”. Currently NDSU Extension does not use this terminology, but PEARS does. Your choices of program areas include “4-H and Youth Development”, “Agriculture and Natural Resources” and “Family and Community
Wellness”. You may check more than one Program Area (ex. Design Your Succession Plan, chose both ANR and FCW).

**PEARS Action Plan – STEP 2: Is this program needed?**

**Was a needs assessment performed for this action plan?** This is a Yes/No question. For 2019, we would like each agent to click yes to explain why this program is needed. By clicking Yes, the following question will appear:

**Brief description of assessment results:** Some of you have an informal reason to do the program, such as it was recommended by the past year feedback, or a formal reason. Here are some potential ideas for what can be entered:

- Program matches community needs as expressed in the 2015 Community Needs Assessment
- Program was requested by the Ransom County Advisory Board
- Program is a result of constituent feedback from the Crop Association
- Program is being provided due to a new weed issue regionally
- Received 90% positive feedback last year on youth and parent survey to offer the program again. Advisory Board also agreed in Nov. 2018 meeting.

**Situation statement:** This is optional. It can be a brief statement of the problem, condition, issue or situation as to why NDSU Extension is programming in this area.

Example:

More than 30 percent of North Dakota children 2 to 5 years of age are considered overweight or obese (with a BMI-for-age above the 85th percentile; Kids County, 2017), Enderlin School requested On The Move Jr. program to address this issue through NDSU Extension.

Once completed, press **Save and continue**.

**PEARS Action Plan – STEP 3: What do you hope the program will accomplish?**

This is an important place to stop and reflect to see if there is an evaluation plan for this program. It will be helpful to connect with a specialist to ensure that you know if there is a pre/post, retrospective, quantitative, qualitative, or other option to use well before you start the program. If this is your local (pilot) program, this is a good time to look at your plan used last year to see if data was helpful or if the approach or data collected needs adjusting.

Outcomes are relative. If you are designing a program that can be completed within 6 months, then short term might be 90 days. If you are designing a program that will take 3 years to complete, short term might be 1 year. The purpose of this section is to help you establish a realistic time table for completion of the project and to give your reader an accurate frame of reference so they can put your efforts into context.

The following sections are optional, however helpful to create your evaluation.
**Short term outcome:** What do we want our learners to know? Short term outcomes address changes that can be accomplished in a relatively short timeframe such as knowledge, awareness, skills, attitude, opinions, and motivations.

**Indicators of short term outcomes:** How will you know if are successful in reaching your short-term outcome goals? What will success look like to you? Can you measure this qualitatively or quantitatively?

**Medium term outcome:** The participants start using the knowledge. What are the participants going to do with the education? Are you looking for a change in behavior or practice? What action could they do such as participate in or plan an action? Is there a policy change that could occur?

**Indicators of medium term outcomes:** How will you know if are successful in reaching your medium-term outcome goals? What will success look like to you? Can you measure this qualitatively or quantitatively?

**Long term outcome:** Participants’ lives are improved over time by using the knowledge. How are their lives improved? What is the desired impact of the program? Will it increase the economic wellbeing of the participant or their community? Will it increase program efficiency?

**Indicators of long term outcomes:** How will you know if are successful in reaching your long-term outcome goals? What will success look like to you? Can you measure this qualitatively or quantitatively? Is there an economic threshold that should be reached?

**Public value:** What is the value of this program to the public? Before you even start the program, describe why this program is in the best interest of the public. If you cannot describe a public value for this program, maybe you should re-evaluate why you are doing it.

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**PEARS Action Plan – STEP 4: Explain a little about the program**

**Intended outputs:** This is recommended, but optional this year. What type of actions will you take? Form a team, design a program, create a curriculum, have training sessions or webinars, evaluate the training, facilitate? Who are the participants? Clients, stakeholders, agencies, decision makers?

Example:
Event/Activity: 1 day workshop [Add what activity you plan to do]
Audience: Youth in Mercer County [Add the audience]
Evaluation Plan: Pre/post survey [Add the anticipated evaluation plan]

**Status:** For Individual Plans, change the Status at the bottom of Step 4 from “Draft” to “Finished” when it is complete.

If you have questions, please consult with your respective District Director or Susan Finneseth at NDSU Extension.