

Adding/Copying/Updating an Action Plan in PEARS

The Action Plan is the foundation for Extension educational programming provided by NDSU Extension. There are two types of action plans: “State/PFT Action Plan” and “Individual Action Plan”. Both types of action plans are updated every year.

The “State/PFT Action Plans” are developed and coordinated within the NDSU Extension program planning teams. These state plans should be developed only within the ‘team’ structure. The teams include:

- 4-H Youth Development Team
- Administrative Team
- Crop Management Team
- Farm Business Management Team
- Horticulture and Forestry Team
- Human Development and Family Science Team
- Issues Management Team
- Leadership and Civic Engagement Team
- Livestock Management Team
- Natural Resource Management Team
- SNAP-Ed
- Nutrition, Food Safety and Health Team
- Personal and Family Finance Team

The “State/PFT Action Plans” are due by December 1 prior to the start of the NDSU Extension calendar year. This allows agents and specialists time to consider the state plan offerings and decide which state plan to copy into their “Individual Action Plan”.

Extension specialists and full-time agents are required to submit “Individual Action Plans” for the upcoming year (parent educators are optional) by January 15. Your individual action plan(s) should be based on relevant data, research, program area specific goals, state or county needs, and/or feedback from past programming or constituents (such as an Advisory Council).

- Specialists must submit at least **one** Individual Action Plan, but are encouraged to submit more depending on the scope of their work.
- Full-time agents are required to submit **four** Individual Action Plans. 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 through the process.

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

Finding an Action Plan in the System to Copy

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 Reporting Year, select the program year “2020”
 - 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. More details on naming programs can be found below.

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.

Project Title: (PEARS Action Plan-Step 1)

Title:* The name of your project (action plan) should follow a standard naming convention.

State/PFT Plans: Start with the main program area, followed by title of program and year.

- Ex. ANR, Herbicide-Resistant Weed Management, 2020
- Ex. 4-H, Horse Program, 2020

Individual/Plans: When copying a state plan to an individual plan, **remove (copy)**, edit the title to include main program area, followed by name of program, followed by county name (for agents) or department name (for specialists) and then individual last name.

- Ex. ANR, Herbicide-Resistant Weed Management, 2020, Steele, Johnson (agent example)
- Ex. 4-H: Horse Program, 2020, Animals Sciences, Skurupey (specialist example)

Reporting Period:* NDSU Extension reports on a calendar year basis. Select “Extension 2020 (January 1, 2020 – December 31, 2020)”.

Level:* Choices are “State/PFT” or “Individual”. If you are entering a plan for yourself, select “Individual”.

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

As a program area team leader, you should choose “State/PFT” at **Level**. Designate the State/PFT plan as “Pilot,” “Core” or “Signature.”

As an individual agent or specialist, 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 area:* 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.

Other contacts: This is especially important for team leaders. These contacts will be able to edit this action 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. Please enter the 2020 Program Area your Action Plan will be used in. 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 (ie Design Your Succession Plan, both

ANR and FCW). The section header “Grand Challenges” is hard coded within PEARS and cannot be edited at this time to reflect our use of this section for “Program Areas”.

Situation: (PEARS Action Plan-Step 2)

Was a needs assessment performed for this action plan?* This is a Yes/No question. If a needs assessment was performed, please enter a brief description of the needs assessment in the following “Brief description of assessment results” text box.

Situation statement: This can be a brief statement of the problem, condition, issue or situation as to why NDSU Extension is programming in this area. This statement can be used as the basis of an “Impact Statement”.

Outcomes: (PEARS Action Plan-Step 3)

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.

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.

Outputs: (PEARS Action Plan-Step 4)

Intended outputs: 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?

Uploads: You have the ability to upload supporting documents such as needs assessment data, articles supporting the planning of the program or any other information you deem necessary to support your program planning efforts.

Status:* For State/PFT Plans, when the plan is completed to your team's (PFT) satisfaction, choose "Yes" in the 'Ready to Submit Field' at the bottom of Step 4. It will automatically be forwarded to the program leader for approval.

For Individual Plans, change the Status at the bottom of Step 4 from "Draft" to "Finished" when it is complete. This allows others within the PEARS system to see your individual plan.