UNIVERSITY of FLORIDA
IFAS Extension

Planning or Refining an Extension Program[1]

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Whether you are a new or experienced agent, the ability to plan a strong Extension program is critical to your success in Cooperative Extension. There are several scenarios in which you may be required to plan a new program or refine an existing one. You may be a new agent who has been asked to carry on the work of your predecessor, presumably refining this work in the process. You may be an experienced agent who has decided it is time to step back and re-think one of your programs. You may be an agent who is responsible for new programming due to advisory committee input, personnel changes, a new grant, or new priorities in your county. In all of these scenarios, thoughtful planning will help you achieve your desired results

Definition of an Extension Program

Before getting into the planning process, it is helpful to define an Extension program. In their fact sheet on the subject, Israel, Brodeur, and Harder (forthcoming) define an Extension program as "a comprehensive set of activities that are intended to bring about a sequence of outcomes among targeted clients" (p. 1). They clarify that a program is more than a single workshop or activity. Among other things, Extension programs are characterized by:

- a focus on the needs of the target audience,

- the intent to affect participant learning and behavior outcomes,

- multiple activities that are comprehensive in nature, and

- the presence of a formal evaluation (Israel, Brodeur, & Harder, forthcoming).

In the context of planning, it is important that you consider your entire program, not just isolated activities or workshops. This exercise will lead to programs in which all the activities work together to achieve an overarching goal or goals. One way of doing this is to start with a clear mental image of the outcomes that you intend to derive from your program.

Principles of Outcomes-Focused Planning

United Way Worldwide (Plantz, 2009) has developed an approach to outcomes-focused planning based on the following principles, all of which are highly applicable to Extension work:

• **Base decisions on facts**. Good planning emphasizes that decisions should be based on data and facts rather than opinions. This is especially important in the Extension context, which asserts that information and approaches should be research-based.

• **Engage the right people for the purpose at hand.** Good planning requires that you reach out to critical stakeholders and engage them in the planning process. Advisory councils, other faculty, and past and current program participants can all contribute to good planning.

• **Be specific about intended results/outcomes.** Good planning starts with the "end in mind," which means that planners should clarify the intended participant outcomes early in the planning process. In Extension, this clarity is achieved through the identification of good learning and behavior objectives.

• **Uncover underlying issues.** To address complex issues, it is critical to have a deep understanding of the problem you are seeking to address. This should include an understanding of underlying causes, possible barriers, and most promising strategies. Journal articles, EDIS, state Extension specialists, and other county faculty are all important sources of information for understanding underlying issues.

• **Aim for lasting community change.** While it is difficult to achieve lasting community change, Extension should be constantly striving to have significant impacts in the communities being served.

• **Measure, learn, improve, and communicate.** The planning process is a circular one that requires ongoing learning and refinement. The strongest Extension programs continually seek feedback and strive to improve programs so that they meet the needs of participants.

As you move forward with your planning, consider these principles and ask yourself whether you are fulfilling each. Are you collecting good information and basing your decisions on data and facts, not just opinions? Are you engaging the

stakeholders who understand your issues and can guide your program? Have you clearly stated the ways in which you want your audience to change in terms of their attitudes, skills, behaviors, and so on? Have you identified underlying causes of the problem you are trying to address and have you addressed these issues in your programming? Are you aiming for lasting change that will benefit the community? Are you collecting good short-term and long-term information and evaluating your progress so you can make ongoing improvements to your program?

If you are able to address these principles in your planning process, you will optimize your chances of having a strong and sustainable Extension program. The following section provides an overview of a cyclical set of steps that you should follow to incorporate these principles into planning your programs.

Overview of Program Planning Cycle

While different situations may require different planning approaches, the overall planning cycle remains the same, with the following eight basic steps:

1. *Engage Stakeholders in Dialogue*

2. *Conduct a Situation Analysis*

3. *Develop Program Goals and Objectives*

4. *Develop Program Logic Model*

5. *Develop Educational Program, Approach, and Materials*

6. *Deliver the Program*

7. *Evaluate, Analyze, and Report*

8. *Learn, Modify, and Improve*

1. Engage Stakeholders in Dialogue

Whether you are starting a new program or are refining an existing program, it is critical to engage stakeholders in the planning process. Key stakeholders can include your program clientele, country decision-makers and key community members, other county and state faculty, your CED,

and your DED. Any person who shares your commitment to your program is a potential stakeholder and a valuable source of information. While the nature of involvement will vary from person to person, ask yourself, "What information can this individual or group provide that will help me create a stronger program?" Stakeholder engagement can be carried out through relatively informal means such as one-on-one conversations or through more formal mechanisms such as advisory groups. As you engage diverse stakeholders, you may encounter different perspectives and opinions. You will need to be able to manage these potential conflicts and keep the group focused on the ultimate goal of creating a strong program. In any case, stakeholder engagement has a variety of benefits, including informing your understanding of the situation (Step 2 below) and creating support for your program.

2. Conduct a Situation Analysis

To address complex issues, Extension faculty must work to understand the situation, need, or problem. Faculty should seek out training and resources on relevant topics and should strive to continually build their knowledge base. The professional development portion of the Program Development and Evaluation Center (PDEC) website (http://pdec.ifas.ufl.edu/prof_dev.shtml) has a variety of resources available. When possible, faculty should also work with the appropriate state specialists and focus teams to inform the Situation Analysis. As an Extension program evolves over time, outstanding faculty continue to learn more about related issues and continue to refine the program. Critical elements of the situation analysis include the identification of

- critical community needs and desired educational programming,

- Extension topics and priorities,

- possible funding sources,

- Extension's strengths and capacities, and

- resources and barriers.

The Situation Analysis should create a deeper understanding of the relevant issues and should help to prioritize the issues and approaches related to your

program. For more information on prioritization, see *Determining Program Priorities* (Harder, 2010) available at http://edis.ifas.ufl.edu/wc105. As a very busy Extension professional, it may feel like you do not have time to assess the situation, but this is a critical step to creating a strong program.

3. Develop Program Goals and Objectives

It is important to develop strong program goals and objectives early in the process and to focus these goals and objectives on the ways in which program participants will change as a result of the program. While program goals are broad and general (such as "to increase environmental awareness among residents," objectives are more specific and targeted as illustrated in the SMART acronym:

- **Specific** – Is the objective specific and clear about what will be achieved?

- **Measurable** – Is the objective measurable?

- **Achievable** – Is the objective achievable given the time, resources, and programming?

- **Relevant** – Is the objective relevant and clearly linked to the desired result?

- **Time-Limited** – Is the objective stated so it is clear when it will be achieved?

Objectives can also be phrased in terms of learning objectives (what will the audience learn as a result of your program?) and behavior objectives (how will the audience behave differently as a result of your program?). For more information on objectives, see *Writing "SMMART" Objectives* (Guion, Baugh, & Marcus, 2006) available at http://edis.ifas.ufl.edu/fy824.

4. Develop Program Logic Model

The program logic model is the foundation for program planning. By engaging in the creation of a logic model, faculty will need to address many critical questions that will help guide and refine program approaches; key elements should include the following:

- **Participant Outcomes.** What are the long-term, intermediate, and short-term outcomes that your program is designed to affect? How will clientele change as a result of your program in terms of knowledge, attitudes, skills, and behaviors?

- **Resource/Inputs.** What resources, both financial and human, do you have at your disposal? How much time, energy, and resources can you devote to this program?

- **Activities and Participation.** What are the activities that are critical to achieving your outcomes? What will these activities need to look like in order to maximize program impact? How will you encourage ongoing participation and engagement?

- **Assumptions.** What assumptions are you making in your logical chain of reasoning? What is your theory for why the program will achieve the intended results?

- **External Factors.** What factors outside your control will affect your ability to deliver a strong program and impact participant outcomes?

The development of logic models encourages strong and systematic thinking about how to deliver high-quality programs that have a good chance of affecting participant outcomes. For more detailed information on how to develop a logic model, please see Israel's (2010) *Logic Model Basics* available at http://edis.ifas.ufl.edu/wc106.

5. Develop Educational Program, Approach, and Materials

Your educational approach and activities should be specifically designed to affect the behavior and learning objectives you have identified. At this point, you should be asking yourself, "How can I maximize my programmatic impact given the time, resources, and expertise I have to share?" As you develop educational materials and approaches, you should seek to identify existing resources that have been well developed. This can include materials from other counties, the appropriate state specialists, and your focus team. You may also search for national

curricula and educational materials that have been refined / evaluated. The Journal of Extension (www.joe.org) is an excellent place to start this search. Research-based information is the hallmark of Extension, so you should be striving to incorporate research- and evidence-based approaches whenever possible.

6. Deliver the Program

As you deliver the program, remember that a program is a comprehensive set of activities designed to lead to desired change among the target audience. Your program will evolve over time as you adapt to the needs of your audiences and continue to refine your approaches. Every time you deliver your program, you should be reflecting on what is working and what needs to be improved. You should also be systematically collecting feedback and evaluation information so you can make appropriate changes and report your outcomes. For county faculty who are new to Extension or who are taking on new responsibilities, it will be critical to establish your credibility with potential audiences. This can be done by working hard to build your knowledge base or by partnering with more experienced faculty early in program development. By doing so, you are more likely to deliver a high-quality program, further enhancing your credibility.

7. Evaluate, Analyze, and Report

Evaluation information can be useful for program improvement and for faculty reporting. Feedback can be provided through formal evaluations as well as through more informal conversations with clientele and other stakeholders. When appropriate, evaluations should include both process information (i.e., how well a workshop was received), and outcome information (i.e., how much were educational and behavioral objectives achieved). This information should be analyzed to assess what is going well and what can be improved. This information should also be reported in annual reports for faculty status. EDIS publication *Evaluation Situations, Stakeholders & Strategies* (Israel, Diehl, & Galindo-Gonzalez, 2009) clarifies when to use certain evaluation approaches for your program and provides a good starting point for thinking about evaluation issues (http://edis.ifas.ufl.edu/wc090).

8. Learn, Modify, and Improve

One of the key purposes of evaluation is to provide information for learning and ongoing program improvement. Evaluation is conducted not only for funders, bosses, and other decision-makers, but also for the Extension educator. Evaluation represents an opportunity for reflection, learning, and refinement. Use your evaluation information to improve your program and to report your accomplishments.

Advice and Conclusions

As you carry out this planning process, you will encounter many challenges and difficulties. Our experience suggests the following practical advice:

- Sometimes, county faculty rely on the engagement of the same few people—it is critical to reach out beyond "the usual suspects" to new and interesting perspectives. Make sure to involve the key stakeholders from the beginning and use participatory methods throughout the process to obtain their input, request feedback, and communicate progress.

- As you engage diverse stakeholders, it is important to keep them focused on the task at hand, which is the creation of a strong program.

- Some county faculty may be hesitant to ask other county faculty or state specialists for their help and advice. Most colleagues will be receptive to such questions and will be happy to help. Use conferences, training events, and other meetings to connect with other faculty members working in your area.

- It is important that you also learn and get ideas from similar programs in other areas. You can find valuable information in the *Journal of Extension* (at http://www.joe.org/) or in the *Journal of International Agricultural and Extension Education* (at http://www.aiaee.org/journal.html).

- For individuals who are having challenges finding data for their Situation Analysis, the Program Development and Evaluation Center (PDEC) has compiled a list of secondary data sources for areas relevant to Cooperative Extension (see http://pdec.ifas.ufl.edu/lrp/secondary-data.shtml).

- Evaluation will present a variety of challenges for faculty, so work with other county faculty, state specialists, and your appropriate focus teams to make sure your evaluation approaches are as strong as possible. Always strive to make your evaluation activities as meaningful and useful as possible for your programming (see *Evaluation Situations, Stakeholders & Strategies* available at http://edis.ifas.ufl.edu/pdffiles/WC/WC09000.pdf).

- Always utilize the results from previous evaluation activities to make decisions concerning the need and appropriateness of fine-tuning your programs. It is a good idea to get feedback on these results from your colleagues delivering similar programs and from state specialists before deciding to engage other stakeholders in a planning process. If the consensus points to a need to re-plan your program, then the focus of the planning process should be on addressing those areas of concern to improve the program's impact.

- It is important to acknowledge when your programs are not meeting your expectations and the expectations of the audience. One way to assess the quality of program delivery is to assess the fit between your program delivery and the target audience. Did you provide the right program for the right audience? (success) Did you provide the wrong program for the right audience? *(rethink delivery)* Did you provide the right program for the wrong audience? *(rethink audience)* Did you provide the wrong program for the wrong audience? *(rethink everything)* To better tailor your programs to your audiences, knowing your audience needs is critical—think about what they already know, what they need to know, and consider how their language, literacy, and culture might shape your programming.

- Annual reporting can be a challenge for faculty. One way to work through this challenge is to start with the structure of the annual Report of Accomplishment, identify the broad program objectives to be used here, and then work backwards to determine how your program activities and specific workshop objectives fit into your larger program description.

Thoughtful planning is critical to your success as an Extension educator. You may feel like you do not have the time to engage in intensive planning, but ultimately your programs will benefit from the time you invest. Planning should be seen as a group activity; the famous saying "two heads are better than one" is certainly true in the context of program planning and evaluation.

References

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