

Planning a Sustainable Program

There are many Program Planning resources available on the internet and through a variety of Cooperative Extension programs. You can also find a number of people who consult with groups to help them develop sustainable programs. There are also just about as many ways to develop a program plan. There is no 100% correct way for doing it - as long as you have a general sense of what you'd like to achieve and by when, and you document your steps, and continuously check in on your progress, you are more than halfway there.

Program planning helps you to document the change you want to make, the steps you'll take to get there, the activities that will help you reach your desired results, and a framework for evaluating your success. Program plans can be ephemeral and meant to change along the way - if you do not meet an outcome, then you simply change course. The most important thing is that you decide on a path forward, document your progress, make changes as needed, and communicate your impacts along the way.

Developing Program Outcome Statements

Program outcome statements are the direct results of or benefits to individuals, groups, communities, organizations or systems. They describe the long-term change you wish to see and can be qualitative or quantitative. When you develop outcomes, think of ways that you also might measure them so you can report on your progress. Outcomes are sometimes used interchangeably with goals. They answer the question "so what?" and describe the difference your program will make. They define the impact you wish to have with your work. As you think about the change you'd like to see your program realize begin by visualizing the change you wish to see and then work backwards toward the steps you will need to implement to get there.

The way you write your outcomes will influence your ability to evaluate what you are doing. Whether your evaluation is quantitative or qualitative, your statement should be written succinctly such that you can read it and quickly understand if you've accomplished change.

When developing your program plan, decide on the time-frame for the work you are doing. Generally, a plan (whether strategic or programmatic) will target the longest term outcomes within a 5-7 year timeframe. The long-term outcomes can also be classified as IMPACTS to the program, describing the conditions you seek via implemented change. **Long-term outcomes (IMPACT)** define the final change in condition you want to see - they can be related to social, economic, civic, or environmental and are not things that can be achieved quickly.

When you develop outcome statements you should write them as though the result has already been achieved. In addition, just like Steven Covey describes in his "7 Habits of Highly Effective People" you should "Begin with the End in Mind (Habit #2).

Medium-term outcomes are the intermediate change that can be seen when taking steps to initiate your change. They can be described as changes in behavior, practice, decision making, policies, or other social action.

Short-term outcomes are the immediate or proximal changes that can be achieved in the near term. They often include changes in learning, knowledge, attitudes, skills, opinions, aspirations, or motivations.

Examples:



Short-term Outcomes	Medium-term Outcomes	Long-term Outcomes
50 Volunteers learn how to make accurate <i>Nature's Notebook</i> observations by Dec. 2018.	5 volunteers make weekly observations for <i>Nature's Notebook</i> for 2 years, though Dec. 2020.	Volunteers have collected 5 years of observational data used in making a management decision, resulting in a change in practice by 2023.
LPL selects and marks 5 species of plants for <i>Nature's Notebook</i> observation for a Phenology walk by Dec. 2018.	Volunteers collect weekly observations on 5 selected species for 2 years, through Dec. 2020.	LPL develops phenology calendars and activity curves for the 5 marked species, identifying trends and changes in timing by December 2023.

In the above example, the short-, medium-, and long-term outcomes are directly related to each other.

Writing long-, medium-, and short-term outcomes

The more specific you can be when writing your outcomes, the easier it will be to measure what you've achieved. Again, you don't necessarily need to attach a quantitative value to your outcome, but if you can it is helpful to do so.

If you like to think about writing formulaically, follow some of the guidelines outlined below for drafting your outcome statements.

Outcome statements also should follow a formula. Include:

- **What or who** is going to be affected
- The change you desire (**action verb**)
- Your **expected results**
- By **when**

This next formulaic criteria also make outcomes very measurable, achievable, evaluate-able, and reportable. These type of statements are often referred to as S.M.A.R.T. statements.

- **S**pecific
- **M**easurable
- **A**mbitious
- **R**ealistic
- **T**ime-bound

Examples of S.M.A.R.T. long, medium and short-term *outcomes* of your phenology monitoring program may include:

- **Researchers analyze** collected observational data to **answer science or management questions by 2022** (Long-term *outcome* or *impact*)
- **Volunteers collect weekly observations** to **document regional seasonal changes by 2019** (medium-term *outcome*). The only thing that would make this statement stronger is adding the number of volunteers.

- **Trained volunteers monitor pollinators in conjunction with plant species** already being monitoring by **December 2019**.
- **Leaders recruited 20 volunteers to monitor phenology weekly by the end of 2018**. (short-term outcome)
- **Researchers recruit and train 5 volunteers to perform weekly monitoring of 3 individuals each of 5 species** by **December 2018**.
- **Trained volunteers collect data along a phenology walk to learn about the species natural history** by **June 15, 2018**
 - *Does that change the meaning of what was originally posted? Excellent question! I'd say that the answer is, it might. It is also an argument for being as clear as you can be when you write your statements. The original statement was, "Volunteers collect data on a phenology walk."*
- **Trained volunteers will continue monitoring and reporting of phenophase observations to expand the dataset of weekly observations through Dec. 2018**.
- **Encourage volunteers to use Nature's Notebook beyond our site next year**.
 - *This statement could be edited even further - the WHO is actually not the volunteers, it is the person doing the encouraging - who might that be? "Next year" can be made more specific as well, by including the actual year (e.g. 2018)*

Developing objective statements

Objective statements are closer in scope to an outcome or a measurable milestone than an activity. **Objective statements are expected achievements that are well-defined, specific, measurable and are developed in relation to your program outcomes and overall goal. They are intended results of your efforts.** Objective statements are intermediate steps on the path toward your outcomes and may involve doing one or more tasks to complete them. They are the steps that you take to achieve your outcome and are not the broader impact you have in the short, medium, or long term - they are interim achievements.

When writing objective statements it is helpful to think about them in terms of measurability. However it is not always necessary to attempt to quantify everything, some things may just help you move toward your outcome without having to be quantified or measured. You should try to be as specific as possible when developing your objective statements. If you are able to write them as a measurable step, then you should use the SMART statement methodology.

Objective statements should also be developed using a similar formula:

- What is the thing you are going to do (**action verb**)
- **Who** is responsible for the action. You should only identify one action per objective statement.
- **When** do you expect to complete it
- If you can, say **how many** or how much

Examples of objective statements for the following outcome statement may be:

Outcome statement: Trained volunteers collect data along a phenology walk to learn about the species natural history by June 15, 2018.

Objective statements:

- **Hank** will **select and mark five plant species** to be monitored at the garden by **November 1, 2017**.
- **LoriAnne** will **establish a Nature's Notebook Group online** and add the selected plants to it by **November 15, 2017**.
- **LoriAnne** will **recruit 4 other volunteers** to assist with weekly monitoring of the plants by **December 15, 2017**.

- **Hank will create and share a volunteer monitoring schedule**, with volunteers signed up to take shifts for 2018, by **January 15, 2018**.
- **LoriAnne will conduct a workshop** to teach volunteers how to collect observations using the *Nature's Notebook* protocol by **February 1, 2018**.

Developing activities, outputs, or tasks: Your ACTION PLAN

Activities are specific steps that you should take to achieve your objectives. They are also sometimes called outputs or tasks. **Activities are efforts or steps taken to achieve your objectives. Sometimes activities are also classified as objectives.** Again, it doesn't necessarily matter what you call these items, the point is to be as specific as you can be when writing them such that they are understandable and achievable.

Each of your objective statements may not have a series of tasks or activities associated with them. But if you can break the objective statements down into steps, it is easier to know what you might need to complete it.

Following the example above, here are some activities or tasks that may help achieve the objective statements. Note that each of the tasks also has a action verb attached to it. You may also wish to assign deadlines to the tasks, especially if you are asking volunteers to assist you with them.

Outcome statement: Trained volunteers collect data along a phenology walk to learn about the species natural history by June 15, 2018.

Objective and activity statements:

- **OBJECTIVE:** Hank will select and mark five plant species to be monitored at the garden by November 1, 2017.
 - Activity or task 1: **check the list** of *Nature's Notebook* species to determine what on the list is present in the garden
 - Activity or task 2: **visit the garden** plot and **identify species** in the field
 - Activity or task 3: **find 2-3 individual plants** of each species on the plot
 - Activity or task 4: **purchase plant tags** to initially mark the plants
 - Activity or task 5: **attach the plant tags** to the plants
 - Activity or task 6: **take pictures of the plants, noting their location** either with a GPS unit or on a map
 - Activity or task 7: **write up species list** and deliver information to LoriAnne so she can create a *Nature's Notebook* Group and site
- **OBJECTIVE:** LoriAnne will establish a *Nature's Notebook* Group online and add the selected plants to it by November 15, 2017.
 - Activity or task 1: **Read the online materials** about How to Observe
 - Activity or task 2: **document a program plan** with outcomes to prepare to request a group in *Nature's Notebook*
 - Activity or task 3: **submit a Group request** form online
 - Activity or task 4: Once Group is created, **establish a site for the Group** and add the plants that Hank identified to the list for observation.
- **OBJECTIVE:** LoriAnne will recruit 4 other volunteers to assist with weekly monitoring of the plants by December 15, 2017.
 - Activity or task 1: **write an informational blurb** for and send an email to all docents
 - Activity or task 2: **write an article for the botanical garden newsletter** seeking volunteers for the program. Include information about why the program is relevant to the garden and what is involved.

- Activity or task 3: **create a job description form** for volunteers interested in this project to help them understand what we are asking of them.
- Activity or task 4: **attend the monthly docent meeting and talk to volunteers** about joining the program
- Activity or task 5: **create a list of names and contact information** to deliver to Hank.
- **OBJECTIVE:** LoriAnne will conduct a workshop to teach volunteers how to collect observations using the *Nature's Notebook* protocol by January 30, 2018.
 - Activity or task 1: **select a date and location** for the training
 - Activity or task 2: **create a brochure and registration** form
 - Activity or task 3: **create agenda and develop outcomes** for the workshop
 - Activity or task 4: **gather materials and content for workshop**, create powerpoints, order lunch, etc.
- **OBJECTIVE:** Hank will create and share a volunteer monitoring schedule, with volunteers signed up to take shifts for 2018, by February 15, 2018.
 - Activity or task 1: **create a doodle poll** to determine when volunteers are available
 - Activity or task 2: **make the final monthly monitoring schedule**
 - Activity or task 3: **share the schedule** with all volunteers
 - Activity or task 4: **communicate the importance of finding a substitute** if they find they cannot monitor on their scheduled day.

Outlines and the Logic Model

There are also many ways to document your process, and no one ultimately correct way to do it. If you are a visual person, you may wish to use one of the many graphical representations of a logic model available via a quick internet search. If you prefer linear work, then you may simply wish to create an outline for tracking your tasks.

However you do it, you should plan to include your outcomes, objectives, activities and tasks in some format so you know how you are getting from point A to point B.

Below is a linear example of nested outcome, objective, and activity statements, using the formulas above, for short-, medium-, and long-term outcomes:

Short-term Outcome: 50 Volunteers learn how to make accurate *Nature's Notebook* observations by Dec. 2018.

Objective 1: LoriAnne develops workshop materials to be used in 3 trainings during 2018

Activity or task 1: select a date and location for the training

Activity or task 2: create a brochure and registration form

Activity or task 3: create agenda and develop outcomes for the workshop

Activity or task 4: gather materials and content for workshop, create powerpoints, order lunch, etc.

Medium-term Outcome: 5 volunteers make weekly observations for *Nature's Notebook* for 2 years, though Dec. 2020.

Objective 1: LoriAnne has identified 5 volunteers interested in making weekly from the 50 participants that were trained during the previous 2 years.

Activity or task 1: host regular opportunities for participants to gather and practice observing

Activity or task 2: create newsletter to deliver to the 50 participants with information about seasonal phenological happening gathered from *Nature's Notebook* data and other available sources

Activity or task 3: select most responsive volunteers from engagement and provide them with further advanced training and guidance to encourage them to make weekly observations on a schedule.

Objective 2: LoriAnne will prepare to utilize the observational data by quarterly viewing data submissions via the visualization tools on the 5 species at the Nature's Notebook sites through December 2020

Activity or task 1: learn how to use the data tools available via the NPN website

Objective 3: LoriAnne will seek researchers interested in utilizing observational data for decision making.

Activity or task 1: identify practitioners, researchers, and partners who are interested in the species being observed

Activity or task 2: advertise data available via multiple outlets on social media, conferences, colleagues, etc.

Long-term Outcome: Volunteers have collected 5 years of observational data used in making a management decision, resulting in a change in practice, by 2023.

Objective 1: LoriAnne will continue to view submitted data via the visualization tool to identify trends in seasonal and annual changes

Objective 2: LoriAnne works with an identified partner(s) to document and report on changes in phenological timing.

Objective 3: The partner implements a change in practice based on findings in observational data.

The number of objectives and activities may vary depending upon what your outcome is and if it is short-, medium- or long-term. These may also change if you identify new partners, tools, or needs between establishing your program and passed time. There is no required number for each category. You also may not be able to readily identify the objectives and tasks for longer-term outcomes until you get closer to that time. This is an exercise to document where you are and the change you wish to see. There are no right or wrong elements.

You can find other examples and activities on this link on the USA-NPN *Nature's Notebook* Activities page: <https://www.usanpn.org/nn/program-planning-guide> On it you will find worksheets for documenting this information and creating your content as well as an action plan for tracking your work for each Outcome you develop.

The point?

The point in doing this exercise is to **document as specifically as you can** what you want to do, what you need to do it, and when you expect to have it complete. This will help you commit to seeing it at least part of the way through.

You may not wish to go into as much detail as we have here, and there is not one correct way to do it, but **the idea is that if you've got your ideas and steps documented, there is a better chance that you will achieve your short-term outcomes** and develop a sustainable program. You also have your ideas written down in case you wish to seek funding OR if you are leaving your position and would like to find someone to make sure that it continues on.

At the very least, you should create solid, time bound outcome statements and develop the steps to achieve them, either by creating objective statements or a list of activities to get you from point A to point B.

It is very helpful to write out the activities or tasks for others you are working with, especially volunteers, so they know exactly what you are asking them to do, where they can get the resources they need to do it, and when you would like for it to be complete. Breaking down the objectives into tasks and sharing that with volunteers helps them to understand how their work fits into the bigger picture.

You should plan to regularly revisit what you've documented and continuously evaluate what you are doing to measure your achievements (objectives) and measure that against your outcomes. If you cannot or have not achieved what you described, then it is perfectly fine to change course and start over.

This program planning process also provides a quick snapshot of what you've done and what you are planning to do in case you need to share the information with supervisors or others who are interested.

By documenting your achievements, you are able to easily celebrate your successes and share annual impacts with stakeholders in your community.