

Colorado Planning and Reporting System

Key Points in Building a Successful Plan to Invest (PTI)

1) Provide a definable “Plan Name” **Plan name:** X County - Small Acreage - Joy Bauder and connecting to at least 1 “Group Plan”.

2) Connect with ‘Plan Information’ provided by your work team, but also provide program specific information that ‘you plan’ to provide for your county, area, region and/or state.

Plan:

Plan Name and Work Team Plans

► Plan information

3) Select Outcomes from the *work team plan* that *you* will be focusing your program efforts. Remember to include each outcome level (Condition, Action & Learning), where applicable.

Choose **condition** outcomes: [From Work Team Plan](#) | [From all plans](#)

Choose **action** outcomes: [From Work Team Plan](#) | [From all plans](#)

Choose **learning** outcomes: [From Work Team Plan](#) | [From all plans](#)

4) In making your selections, remember that there are a few steps you must take. Let’s review:

a) Select ‘outcomes’ condition 1st, action 2nd, learning 3rd

b) Next select ‘indicators’ that you will be reporting on.

The screenshot shows three SAM items: SAM 1 (Condition), SAM 1.1a (Action), and SAM 1.1b (Learning). Red arrows point from each SAM item to an 'Add Indicator' box. A central callout box says "Don't forget to select indicators!". The 'Add Indicator' boxes contain options: "Select from work team plan", "Select from all", "New", and "Remove outcome". Below the SAM items, two "From Small Acreage Management - Group Plan:" sections are visible, each with a "Submit and close" button.

5) Proactive Planning, allows for easier Reporting

The screenshot shows the "Adjust indicator values for your contribution:" section. It includes a grid for reporting years (2013-2017) with fields for "How many change:" and "How many possible:". A callout box says "Encouraging indicator values allows one to 'plan' for the year and provides effective measurements for work team reports." Below the grid is a "Locations to be impacted:" section with "Available locations:" and "Selected locations:" lists.

6) Next, Select Program Area, then Outputs

The screenshot shows a list of program areas with checkboxes: 4-H Youth Development, Clean and Renewable Energy, Community Development, Competitive and Sustainable Agriculture Systems, Family and Consumer Science, and Natural Resources and Environment (checked). A callout box says "Choose outputs from work team plan (s)" with links for "Add new output", "Add inputs", and "Remove Program Area".

7) Editing Outputs information is also encouraged

SAM 1) Trainings/Classes/Workshops, Field Days, Activity Days, and/or Field Visits

(Show details) | [Edit](#) | [Remove](#) | [Add audience](#)

Your contribution to output:

Use the grid below to enter the number of outputs planned for each year of the plan.

	Reporting Year				
	2013	2014	2015	2016	2017
Number planned:	10	0	0	0	0

Primary audience

Participant type:

Enter the number of participants for each year of the plan:

	Reporting Year				
	2013	2014	2015	2016	2017
How many participate:	15	0	0	0	0
How many possible:	20	0	0	0	0

Location(s) of participants:

Available locations:

Selected locations:

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8) Add Inputs, where applicable

[Choose outputs from work team plan \(s\)](#) | **Total effort for each year of plan:**

[Add new output](#) | **Enter planned time – required!**

[Add inputs](#) | **Remaining inputs are not required, yet encouraged.**

[Remove Program Area](#) | **Remember ‘Proactive Planning’ makes for easier ‘Reporting’**

	Reporting Year				
	2013	2014	2015	2016	2017
Total days:	0	0	0	0	0

Multistate effort for each year of this plan:

Aides & Seasonal Staff contributions for each year of the plan:

Volunteer effort for each year of this plan:

Dedicated clerical staff

Collaborators:

Other inputs:

As stated from previous communication, it is always good practice to talk with your immediate supervisor, mentor and/or work team leaders for guidance on program questions.