

**FINAL DRAFT**  
**Planning and Reporting Documents**  
**CNRED Program Area and CRD Academic Department**

<b>Community Resource Development Faculty</b>		<b>CNRED Program Academic Staff</b>	
Non-Tenured	Tenured	Grants & Contracts	Other (county & campus-based)
<u>Plans</u> Annual plan for calendar time frame. (January-December) (Required this year by July 1.) Multi-year plan for planning cycle	Planning for an annual calendar time frame.	Timeline and due date, as prescribed by the funder.	Timeline and due date as prescribed by program area.
<u>Send to:</u> File with academic dept. & program area (required) Faculty member should also provide copies to vice-chair, mentor, district director, department head.	No formal filing required. Copies (suggested) to program area, district director, department head.	File with funding source, unit director and principle investigator.	As prescribed by program area. (County-based follow same guidelines as non-tenured, except requirement to file with academic dept.)
<u>Reports</u> Planning and Results System inputs <u>can</u> be incremental. Narrative and statistical information <u>must</u> be filed at least once per year for calendar year.	Planning and Results System inputs <u>can</u> be incremental. Narrative and statistical information <u>must</u> be filed at least once per year for calendar year.	Planning and Results System inputs consistent with team plans. Also, reporting requirements from fund source.	Planning and Results System reporting same as faculty.
<u>Send to:</u> *Annual Accomplishment Report filed by January 15 with Academic Dept. (required). Copies to same list used for annual plan of work.	*Annual Accomplishment Report compiled by January 15.	*Annual Accomplishment Report filed with funding source for reporting period.	*Annual Accomplishment Report compiled by January 15. Copies as prescribed by program area.

\*Completed reporting, whether built incrementally or annually, in the Planning and Reporting System (PRS) should provide the basis for Annual Accomplishment Report (AAR). Success stories, impact statements, impact indicator and statistical information from major programs should be used to assemble AAR.

Non-tenured faculty must compile and send AAR to academic department as a discreet document for governance purposes. For tenured faculty, completed reporting to PRS should reflect content expectations for AAR and no formal, separate document is necessary since reporting in PRS is retrievable. Tenured faculty should note that reporting and therefore retrievable information will be important in post-tenure review and promotions.

Note that neither the PRS or AAR are intended to report every programming activity or outcome.

**Plan and Report Purposes**

- Plans are useful in setting and communicating program direction.
- Plans and reports should lead to more focused programming and increased impacts.
- Reports should document accountability to stakeholders, partners, funders and colleagues while supporting shared learning, personal evaluation and professional growth.
- Plans and reports should be part of communication strategies to key stakeholders.

<b>Non-Tenured</b>	<b>Tenured</b>	<b>Grants &amp; Contracts</b>	<b>Other Academic Staff (county &amp; campus-based)</b>
<p>Key Stakeholders:</p> <ul style="list-style-type: none"> <li>• Academic Department</li> <li>• Program Area</li> <li>• County Dept. Head</li> <li>• District Director</li> <li>• Faculty Mentoring Team</li> <li>• Extension Committee</li> <li>• Colleagues</li> <li>• Other</li> <li>• Useful in self-initiated review</li> <li>• 1, 2, 3 year reviews</li> <li>• Support for promotion</li> </ul>	<p>Key Stakeholders:</p> <ul style="list-style-type: none"> <li>• Academic Dept.</li> <li>• Program Area</li> <li>• County Dept. Head</li> <li>• District Director</li> <li>• Extension Committee</li> <li>• Colleagues</li> <li>• Other</li> <li>• Useful in Self-Initiated review; Tenure Faculty review; Support for promotion</li> </ul>	<p>Key Stakeholders:</p> <ul style="list-style-type: none"> <li>• Funder</li> <li>• Program Area</li> <li>• District Director</li> <li>• Colleagues</li> <li>• Other</li> <li>• Useful in Self-Initiated Review; 1, 2, 3 year Reviews (as appropriate)</li> <li>• Support for promotion (as appropriate)</li> </ul>	<p>Key Stakeholders:</p> <ul style="list-style-type: none"> <li>• Funder</li> <li>• Program Area</li> <li>• Department/Unit Head</li> <li>• District Director</li> <li>• Extension Committee</li> <li>• Colleagues</li> <li>• Other</li> <li>• Useful in Self-Initiated Review; 1, 2, 3 year Reviews (as appropriate)</li> <li>• Support for promotion (as appropriate)</li> </ul>

Specific format and content guidelines for plans and reports are provided in additional documents available from the Department and Program Area.

June 2000

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