Oregon State University
Extension Service

SOARS!

Stories, **O**utcomes, **A**ccomplishments, and **R**eport **S**ystem

Data Entry Manual
Version 2.04
Revised September 1, 2013

SOARS Web Page:
http://extension.oregonstate.edu/employees/employee-resources/soars

Table of Contents

Preface: Navigating SOARS - Highlights of Helpful Features

The SOARS system includes many of the improvements suggested by users. Here is an overview some basic helpful features of SOARS. In addition, details of these and other features are described at their respective locations within the SOARS Data Entry Manual.

System Requirements
To use SOARS, you should use a Mac or PC with a current operating system and web browser. To eliminate potential problems, **we strongly advise using Mozilla Firefox as your web browser**. Most of the troubles reported with SOARS have resulted from using out-of-date browsers or user error. To prevent user error, please read this Data Entry Manual.

A Quick View of User Status in "My Profile"
A "My Profile" section on the left side of the SOARS screen provides a summary of user info. For supervisors, a convenient list of supervisee info is listed there. The Immediate Supervisor can be set (and edited) on a user's My Profile screen.

Help for SOARS Within SOARS

Contextual "help" screens are indicated by symbols throughout SOARS. Clicking the blue HELP button brings up a dialog box with a definition or more information on that item. For example, in the "Add New Plan of Work Screen" a HELP button is located next to the acronym "SPWA."
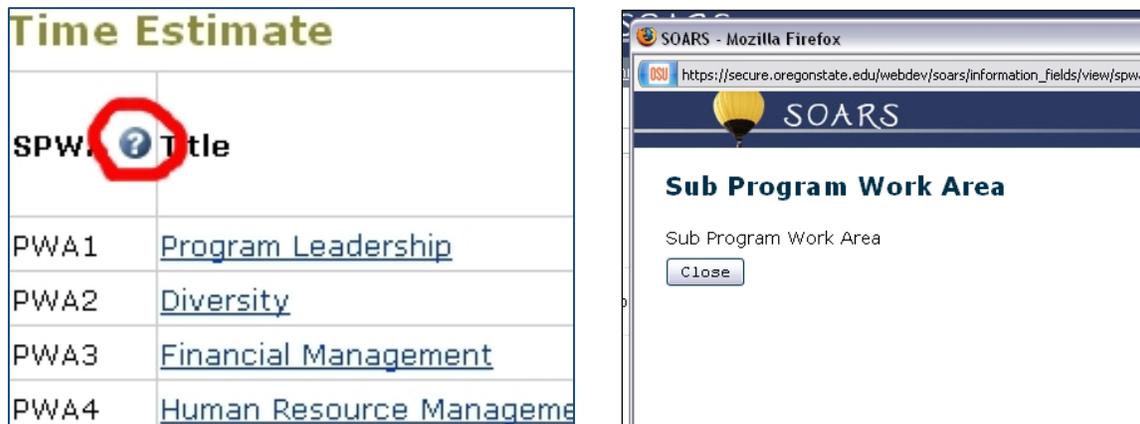
The image on the left demonstrates where a HELP button might reside. The image at right shows one example of the HELP dialog box that pops up when a user clicks on a blue HELP button.

Searching within SOARS
A Google-style search option enables you to find information about programs being conducted, publications, information posted by specific users, information about specific counties, and more. Just type in key words and it will find all entries with that key word. All information can be searched by all users except Professional Development Plans & Reports, which are only viewable by immediate supervisor and administrators.

Note that there is a five minute delay for the system to index data. That is, if a user enters certain information and searches for that information immediately following its input – it is likely that the search will not yield those specific results.

Pasting of Text from Microsoft Word

It is a good idea to prepare your Plan of Work and Report of Accomplishment offline first (such as in Word) and then paste in each section. This allows you to be more thoughtful in your writing, makes it easier for editing and spell-checking, and allows you to maintain the information outside of SOARS for other purposes.

To paste large chunks of information from Microsoft Word documents, use the "Paste from Word" feature, which requires the use of this button:

The "Paste from Word" button is available wherever you enter text. Click the button, and then paste your text into the box that pops up. This method removes the extra formatting that Word often includes that can ruin your entries.

Questions? Need More Help?

If, after reading the Data Entry Manual, you still have questions, contact your SOARS program area contact. They are listed on the Extension SOARS page at http://extension.oregonstate.edu/employees/employee-resources/soars.

Oregon State University Extension Service
I. Annual Program Planning and Reporting Cycle

	Faculty and Educators	Program Leaders	Extension Administration
September 1		Updated program plans due in SOARS	
September 1 - 30		Program area plans are reviewed by Extension Administration and approved or modified as needed.	
September 30	Updated program plans are locked in SOARS- no modifications beyond this date		
October 1	Individual Plans of Work (POW) Open		
December 15	Individual Plans of Work (POW)Due (Requires approval of immediate supervisor to add or alter after Nov. 30)		
November 15	Individual Reports of Accomplishment (ROA) Open		
January 15	Individual Reports of Accomplishment (ROA) Due (Requires approval of immediate supervisor to add or alter after Feb. 1)		
January 15	Extension Contacts and Extension Volunteer Reporting due in SOARS for previous year		
February 15- April 15	PROF Reviews Conducted		PROF Reviews Conducted
April 1			Federal ROA and updated POW due
August 1			University Provost Report Due

II. Getting Started: Gaining Access to SOARS

SOARS access requires an OSU "ONID" account. If you don't have one, set up your ONID account at http://onid.oregonstate.edu. If you are not an OSU employee and need access to SOARS, an alternative login account can be provided for you. Please contact your SOARS program contact listed at http://extension.oregonstate.edu/employees/employee-resources/soars.

III. Individual Annual Plan of Work (POW)
(Due Annually by December 15)

All faculty and other individuals conducting educational programs for Extension (.20 Extension FTE or greater), regardless of funding source, are required to complete an individual annual Plan of Work (POW). Your Plan of Work is the crucial first step to being able to report your accomplishments at the end of the year and your annual performance evaluation (such as the "PROF" for faculty) is almost exclusively based on your SOARS entries.

There are four parts to the POW:

1. Estimate of Planned Time
2. Logic Models for Planned Programs
3. Program Evaluation Plans for Selected Programs
4. Professional Development Plan

Each Extension program area, including EESC and Administration, has developed a program area work plan under which Extension educators prepare an individual plan of work (POW). Extension faculty and educators create a separate POW for each underlined official program appointment. For example, someone with a 100% appointment to one program area will complete one plan of work. Those with split assignments will complete a separate plan of work for each program area to which they are assigned. Only those with official administrative assignments (e.g. staff chairs) will complete an administrative POW.

Upon entering the improved SOARS system, you will be required to enter your immediate supervisor's name. ***You cannot proceed without a supervisor indicated***. If you are in a county

extension office, your immediate supervisor is likely your county staff chair. However, if you are unsure who your immediate supervisor is, please check with your staff chair or your SOARS program area contact. For most on-campus faculty, the Department Head is the immediate supervisor. After you have completed your POW or ROA, the entry will be locked on the due date and an email will be sent to your immediate supervisor (who you designate upon first entry to SOARS) indicating that you have submitted a POW and it is ready for review. If further edits to your entries are needed, or you would like to edit your entries after the deadline has lapsed, you will have to contact your immediate supervisor through SOARS to request the entries be unlocked for editing.

This option is available in SOARS. Selecting a POW or ROA brings up an overview of the document (as you can see in the image at the below left). If a plan is locked, a blue link to request it be unlocked is available.
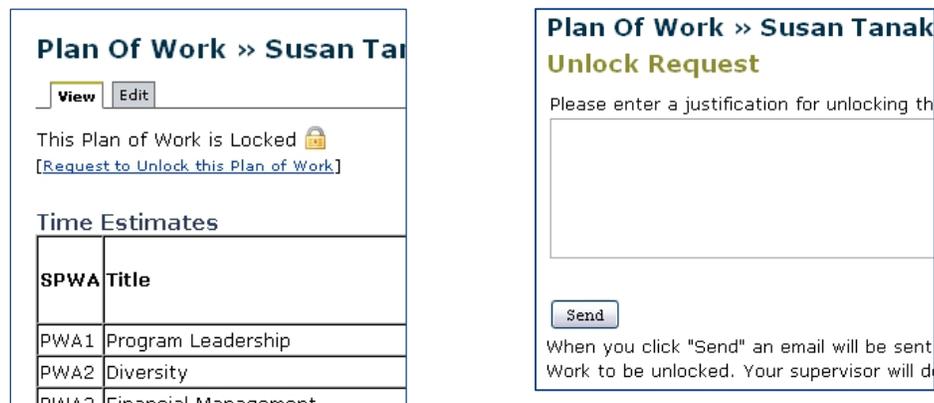
Selecting this link directs the user to a screen (see image above right) with the unlock request, and a text box to enter a justification for unlocking the entry. *Justification is REQUIRED. A suggested part of the justification, as appropriate, is explaining that you have consulted your Program Leader first.*

Ability to Transfer Last Year's Plans of Work

SOARS allows last year's POW's to be transferred over and revised as appropriate. If there is not a comparable POW from last year, this is not possible. (The POW and all SPWAs included must be identical for the POW roll-over feature to apply. No additional SPWAs can be included, and none can be removed. If all the criteria are met, a dialog box appears that asks "Do you want to copy your Plan of Work from last year?")

To create an individual POW:

1. **Log on to SOARS using ONID account and password**
   https://secure.oregonstate.edu/soars/
2. **Click on Plans of Work under Annual Reporting on the left menu**
3. **Click on "add a new plan of work"**
4. **Choose the program area and the year and click "create a new plan of work"**
5. **Note that agriculture POW's require an additional step of selecting specific areas of agriculture that best fit the educator's work assignment**

HELPFUL HINT

It is a good idea to develop your Plan of Work offline first (such as in Word) and then paste in each section. This allows you to be more thoughtful with your planning and develop a higher quality plan that will be easier to report accomplishments toward. SOARS also allows last year's plans of work to be transferred over and revised *as appropriate*. If there is not a comparable POW from last year (identical Program Works areas and sub-areas if applicable), this is not possible.

Once the plan of work has been created the following steps are completed for each POW:

1. Estimate of Planned Time

In this section you will fill out an estimate of the time you plan to spend during the next calendar year (January 1 – December 31) on educational programs and other activities related to the program work areas in your program area.

Example: Estimate of Planned Time

This example uses the 2007 program work areas for forestry.

		% Time	% IER	% MS	% CP
PWA 1	Enhancing the Competitiveness of Oregon's Forest Enterprises	45	10	2	0
PWA 2	Public Engagement for Planning Oregon's Forestry Future	25	0	0	0
PWA 3	Sustaining Natural Resources	0	0	0	0
	Innovative- Flexible Time	25	0	0	0
	Service	5	0	0	0
	Total:	**100 %**	**10%**	**2%**	**0%**

Estimate of planned time data entry instructions:

1. In the first column of the table (%Time), enter an estimate of planned time in each PWA, flexible-innovative time, and service time boxes. These numbers must total 100%. If you have less than a 1 FTE appointment in this Extension Program Area, you still plan 100% of that time. For example, someone with a .75 FTE appointment would still plan 100% of .75 time. Likewise, someone with a 50/50 appointment in two program areas would plan 100% of their .5 FTE in both of the work areas. SOARS will "know" what your FTE is and adjust accordingly.

2. The last three columns capture the percentage of time in each PWA that is dedicated to one of the following:

>   IER = Integrated Research and Extension
>
>   MS = Multi-state programs
>
>   CP = Programming that is conducted across OSUES programs

In these columns, you enter the total amount of planned time that also falls in one of these additional areas. In the example above, the educator planned 45% of her time in PWA 1 and indicates that 10% of her total time will be spent in IER in that PWA. Note that this is 10% of her TOTAL time, not 10% of the 45%. Likewise, she indicates that 2% of her TOTAL time in this PWA will be spent in multi-state programming.

Note: As of the date this manual is published, our Federal partners have not provided final definitions for IER and MS. In order to be in compliance we must report work that is done in these areas, but we also realize that it is hard to report what we can't define. Therefore, please provide the best estimate you have of any programming you think clearly falls in the IER or MS areas. Updates on current definitions will be updated in SOARS online help as we learn more.

2. Logic Models for Planned Programs in Program Work Areas (PWA's)

<div style="border:1px solid orange">

HELPFUL HINT

Note: In many sections of SOARS you can click on the upper right corner of the text box and it will enlarge the box. Doing so will also reveal a text editor that allows you to format and spell check your entries.

</div>

A large part of the planning process involves creating **logic models** for planned programs. The logic models will show how an individual educator's programs lead to the long-term outcome articulated for a particular Program Work Area. To create a logic model, you will:

1. Describe in narrative form what will be done and who will be reached by the (this is called the program *outputs*).

2. Describe the short-term outcomes for the program in narrative or outline form. Short-term outcomes generally refer to the *learning objectives* of the program.

3. Describe the medium-term outcomes for the program in narrative or outline form. Medium term outcomes generally refer to the *action or behavior* changes that should occur as a result of the program.

4. It is important to create enough logic models to account for all of your educational programming in each PWA. The number of logic models you prepare is up to you, and dependent on how many different types of programs you are doing in each PWA.

5. You do not need to complete logic models for your flexible-innovative time, or for service.

6. At the end of each logic model please indicate whether the planned program contributes to one or more of the three Extension Theme Areas:
   a. Strengthen communities and economies
   b. Sustain natural resources
   c. Promote healthy families and individuals

7. If you are planning a program in Agriculture you will also be asked to indicate whether your program contributes to one of the follow:
   a. Soil and water resources
   b. Production efficiency
   c. Integrated pest management
   d. Organic farming

8. Finally, indicate if you plan to conduct a formal evaluation of the program. If you check "yes," continue on and complete the evaluation plan information in the next section.

   [Autosave occurs *every five minutes*. The system logs the user out *after two hours*.]

3. Evaluation Plans for Selected Programs

Program evaluations help us understand the success and impact of our educational efforts. Information provided in this section helps programs and program work area groups to coordinate common evaluation efforts. The information requested in this section is information typically

required in a formal evaluation report. Information entered at the planning stage will be self-populated at the reporting stage. Provide as much information as possible at the planning stage. Additional or more complete information will be requested at the reporting stage.

4. Professional Development Plan

Professional Development plans need to be completed by all faculty members who are part of the PROF review process. Other faculty (e.g. campus-based specialists) may also be required to complete this section if required by his/her supervisor.

Note: Only one professional development plan is prepared, regardless of the number of official program assignments a person has. The plan is completed in the first POW created. If additional POWs are created for other program areas, the professional development plan will already be included.

5. Finish

Once your POW is finished, you can proofread the entire plan by clicking **preview** in the upper right corner. You can also download your POW in a PDF file by clicking **PDF** in the upper right corner.

LATE SUBMISSIONS:

After December 15, your POW will be "locked" and require the approval of your immediate supervisor to submit or edit it. If you attempt to submit or edit it after the deadline, it will trigger an unlock request sent to your immediate supervisor by SOARS and requires a justification.

Please note: Once the submission deadline has passed a late submission may be considered "last year." There is a POW option in SOARS where the user can [Create for a previous year]. Clicking this option will prompt an "unlock" request.

IV. Individual Report of Accomplishment (ROA)
(*Due Annually on January 15*)

The Annual Report of Accomplishment (ROA) can be submitted in SOARS beginning November 15 for that year's POW. (The final deadline is January 15.) The ROA provides all the information needed for the annual PROF review, and provides additional information to Extension about the actual allocation of program funding.

After January 15, your ROA will be "locked" and require the approval of your immediate supervisor to submit or edit it. If you attempt to submit or edit it after the deadline, it will trigger an unlock request sent to your immediate supervisor by SOARS and requires a justification.

ROAs are prepared for each program area. As with the POW, those working in only one program area will prepare only one ROA. Those with split assignments will prepare one ROA for each program area to which they are assigned. There are five parts to the ROA:

1. **Report of Accomplishment Summary**
2. **Report of Actual Time against Planned Time**
3. **Professional Development Report**
4. **Program Evaluation Reports**
5. **Updated/Annual Vita (Word or PDF File; Uploaded)**

To create an individual ROA:

1. **Log on to SOARS using ONID account and password**
   https://secure.oregonstate.edu/soars/
2. **Click on Report of Accomplishment under Annual Reporting on the left menu**
3. **Click on "add a new report of accomplishment"**
4. **A list of the POWs prepared for the previous calendar year will appear.**
5. **Choose click on the program area for the correct year**
6. **Note that agriculture POWS require an additional step of selecting specific areas of agriculture that best fit the educator's work assignment**

HELPFUL HINT

It is a good idea to develop your Report of Accomplishment offline first (such as in Word) and then paste in each section. This allows you to be more thoughtful with your reporting and develop a higher quality result that will be more useful and more likely to help you achieve a positive annual performance evaluation.

Once the ROA has been created, complete the following steps:

1. Report of Accomplishment Summary

Educators will write a brief (no more than one page) summary of their work in this program area during the past year. This is an opportunity to share what the educator feels are the highlights of his or her work during the past year. Only one summary is prepared for each program area. It should be viewed as a "cover letter" or "introduction" to the rest of the ROA.

Potential Outline:

- Situation
- What was done
- What difference was made

Example of part of a summary:

"Despite the need to provide programming for youth in the area of workforce preparation, there is no curriculum available to support such programming efforts. In 2008 I worked with two other faculty members to develop "4-H Career Pathways: Creating A Life worth Living," a workforce preparation curriculum designed to help youth be prepared for the transition from school to work. We secured $5,000 in development money to prepare the curriculum. The curriculum is completed and ready to pilot with youth in 2009."

2. Report of Actual Time against Planned Time

This section is identical to the Estimate of Planned time section in the POW. For the ROA, provide estimates of **actual** time against the time that was planned. This will include reports of actual time spent in Integrated Extension and Research (IER) Multi-State Programming (MS) and programming done across OSUES program areas (CP).

The purpose of this section is to create a view of how educator time was actually spent compared to what was planned. Many times, programming changes over the course of a year. Examples include a change in work assignment, new funding, or response to an emerging situation or need. It is important to note that we want to capture what actually took place, and that this is not a test of how well an educator "followed through" on his or her plans.

3. Professional Development Report

In this section educators will complete a professional development report based on the plan that was submitted during the POW process.

4. Program Evaluation Reports

In this section educators will complete program evaluation reports based on the plan(s) that were submitted during the POW process.

Program evaluation (in the form of an Evaluation Plan and Evaluation Report) is a critical part of SOARS and also a necessary means to provide a credible impact statement. See the SOARS web page (http://extension.oregonstate.edu/internal/soars) for a list of sites with helpful resources for Extension program evaluation.

> *A Note about SOARS and IRB*
>
> The requirement to enter program evaluation/impact data into SOARS does not automatically result in the need for Institutional Review Board (IRB) approval. However, you are expected to seek IRB approval for program evaluation that constitutes "research with human subjects." Many program evaluation efforts without the intent to publish in scholarly journals do not meet that definition and therefore do not require IRB approval. However, the final determination of whether a project requires review lies with the IRB. Prior to completing an application, contact the IRB to discuss whether your project requires IRB review. More information can be found at the SOARS web page (http://extension.oregonstate.edu/employees/employee-resources/soars).

5. Updated/Annual Vita (Word or PDF File; Uploaded)

Individual educator vitae contain the detailed account of the work completed during the past year. Each educator will upload a current vita that is saved in a MS Word (.doc or .docx) or PDF (.pdf) file. The vita may either be an annual vita, or an updated version of a complete vita with the current year's work highlighted. **Note: Please check with your immediate supervisor regarding what is expected for uploading, as some will require a complete vita, others just an annual version.**

HELPFUL HINT

To avoid entering citations for publications twice, first enter them into SOARS. Upon completion, click the Citations Only button (Citations Only HTML) to generate a list of your citations. You can copy this list and paste it directly into your vita.

To Upload a File to SOARS

1. **Prepare your vita ahead of time, and have a final version ready on your computer**

2. **Be sure your vita is in either a PDF, RTF, or Microsoft Word format**

3. **Click "Browse" and locate the file containing your vita on your own computer**

4. **When the file is identified, click "save" to upload your file**

5. **Anytime you upload your vita, the new uploaded file will replace the one currently on SOARS. This means if you upload your vita and then make changes to the file on your own computer, you can go back to this step and upload the current version.**

LATE SUBMISSIONS

After January 15, your ROA will be "locked" and require the approval of your immediate supervisor to submit or edit it. If you attempt to submit or edit it after the deadline, it will trigger an unlock request sent to your immediate supervisor by SOARS and requires a justification.

HELPFUL HINT
Do you need web site statistics for SOARS?

If you are seeking statistics on web downloads of your learning materials and communications to report in SOARS or for other purposes, go to this page: http://extension.oregonstate.edu/eesc/how-to/web-statistics-tutorial.

V. Ongoing Data Collection

(This information should be entered as soon as it is available)

OSU Extension has particular reporting requirements for which the following information is needed. While some of this information is reported on each educator's vita (e.g. awards and publications), it is also necessary to collect it on an ongoing basis in the following formats. We also want to be sure that we do not have duplicate reports in each of the following sections. It is important, therefore, that only the P.I. (or other designated person) enter external funding information. Lead authors are responsible for reporting publications.

Note: The "official" record of these accomplishments is each person's vita; that is where the "credit" for the work is noted.

1. **External Funding**
2. **Publications**
3. **Awards**
4. **Formal Impact Statements**
5. **Extension Contacts**
6. **Extension Volunteers**

External Funding

A record of external funds received should be entered in SOARS as soon as the money is awarded, or at the end of the calendar year, if reporting a lump sum (see below).

General Instructions

There and three types of external funds that need to be reported in SOARS:

1) Grants and contracts

Grants are contracts are funds awarded to Extension educators for the purpose of completing specific programs or activities.

2) Gifts and Contributions: Direct Result of Faculty Efforts

Gifts and contributions are funds raised through the direct effort of Extension educators-usually through a request to the donor. These include gifts to the ARF or Oregon 4-H Foundation that are a direct result of the educator's fundraising efforts.

3) *Gifts and Contributions: Indirect Result of Faculty's Efforts*

Gifts and contributions are funds not raised directly by the Extension educator, but raised by other groups in order to facilitate the work of Extension at the local level. This includes money raised by local 4-H or Master Gardner Associations. The local Extension educator should enter a lump sum total of amounts raised by these groups at the end of each calendar year. For example, the county 4-H agent should enter the total amount raised by the county 4-H leaders association at the end of December each year.

How to Enter a Record of External Funding into SOARS

1. Log on to SOARS using your university ONID login and password
   https://secure.oregonstate.edu/soars
2. Click on "External Funding" under "Ongoing Reporting" on the SOARS homepage
3. Click "Add a new external funding" at the top of the page
4. Enter the requested information in each text box.
   Note: All text boxes with a red asterisk must be completed for the record to be accepted

Publications

Publications should be entered as soon as the material is officially published.

General Instructions

1. Publications must only be entered once, regardless of the number of authors who are listed on the citation. Authors should decide who will enter the information into SOARS. Keep in mind that the "official credit" for any publication is found on each author's vita. **Please be careful not to enter the same publication more than once**.
2. Publications entered in SOARS should represent significant scholarly pieces. Please do not enter things like newsletter articles or monthly news columns- these are recorded in ones' vita.
3. A drop-down list of publications types is provided; there is an "other" option available if your publication does fit one from the list. In general, the types of publications needed for this section of SOARS can be covered in the list provided.

How to Enter a Publication into SOARS

1. Log on to SOARS using your university ONID login and password
   https://secure.oregonstate.edu/soars

2. Click on "Publications" under "Ongoing Reporting" on the SOARS homepage

3. Click "Add a new publication" at the top of the page

4. Choose an Extension Program Area from the drop-down list. In some cases you will simply have to choose a program area, even if the publication can fit in more than one.

5. Enter the month and year of the publication

6. Enter the publication title

7. Choose the publication type from the drop-down list

8. Enter the complete citation for the publication, in the citation style used in your vita (you can cut and past this from your vita if desired).

HELPFUL HINT

To avoid entering citations for publications twice, first enter them into SOARS.

Upon completion, click the Citations Only button (Citations Only 🔲) to generate a list of your citations. You can copy this list and paste it directly into your vita.

Sample Citation (APA Style)

Teacher, J. P. & Student, P. J. (2007). From the teacher to the student: Advances in the way we learn. *American Journal of Teaching and Learning*, *45*, 345-415.

Awards

Awards should be entered as soon as they are officially awarded.

General Instructions

- Awards must only be entered once, regardless of the number of people on a team. Award winners should decide who will enter the information into SOARS. Keep in mind that the "official credit" for any award is found on each person's vita. Please be careful not to enter the same award more than once.

- Awards entered in SOARS should represent awards of significant recognition.

▪ Drop-down lists of award levels and types are provided; there is an "other" option available if your award does fit one from the list. In general, the types of awards needed for this section of SOARS can be covered in the list provided.

How to enter an Award in SOARS

1. Log on to SOARS using your university ONID login and password
2. Click on "Awards" under "Ongoing Reporting" on the SOARS homepage
3. Click "Add a new award" at the top of the page
4. Choose an Extension Program Area from the drop-down list.
5. In some cases you will have to choose the best program area for the award- even if the award crosses program areas.
6. Enter the month and year of the publication
7. Choose a college. In some cases you will have to choose the best college for the award- even if the award crosses program areas.
8. Enter the award title
9. Enter the name of group or organization conferring the award
10. Choose the award level and type from the drop-down list
11. Enter the names of all team members (for team awards)

Impact Statements

Impact statements should be prepared and entered into SOARS whenever there is a known program impact. This generally comes after some type of program evaluation or impact analysis has been conducted and, quite honestly, when there is some impact to report! **Impact Statements are prepared in a standard format that includes:**

- Title of the program
- The audience being reached through the program
- A description of the issue being addressed
- A report of the program impact
- A list of all Extension faculty involved with the program
- A list of other Oregon State University partners
- A list of external partners (particularly funders)
- Contacts for more information about the program

HELPFUL HINT

To understand the importance of impact in program development and reporting, refer to a relevant *Journal of Extension* article at http://www.joe.org/joe/2003february/a6.shtml.

Detailed information about the preparation of impact statements can be found at the end of this document.

General Instructions

- Impact Statements must only be entered once, regardless of the number of faculty who are listed on the project. Faculty should decide who will enter the information into SOARS. Please be careful not to enter the same Impact Statement more than once.
- Impact Statements entered in SOARS should represent only programs for which a clear impact can be described.

Data Entry Instructions

2. Log on to SOARS using your university ONID login and password https://secure.oregonstate.edu/soars

3. Click on "Impact Statement" under "Ongoing Reporting" on the SOARS homepage

4. Click "Add a new impact statement" at the top of the page

5. Choose an Extension Program Area from the drop-down list. In some cases you will simply have to choose the best fitting program, even if the impact is in more than one program area.

6. Enter the required information

7. When cutting and pasting information from a word document, you may lose some formatting. Use the Paste from Word button or use the text editor in the text box to re-format. Also, if you cut and paste and the font is larger than the original document, click out of the box and then back into it; that seems to help this issue.

8. Ag users can click the "Notify the ORIN Administrator" box to inform the Oregon Invests! database administrator of impact statements that may be relevant for inclusion in ORIN.

Extension Contacts

Information collected under Extension Contacts is used to report against Extension's Civil Rights expectations and also shows the scope of Extension's reach. Contacts need to be reported by February 1 for the previous calendar year.

HELPFUL HINT

It is recommended that you update your Extension Contact record regularly throughout the year. SOARS keeps a running total of changes made over the year and you are able to edit contact numbers entered previously. See below for helpful tools for keeping track of contacts.

NOTE: Extension Contacts reported in SOARS are not part of a faculty's annual performance evaluation (with rare exceptions). Therefore, accurate contact numbers are important; there is no benefit to inflating contact numbers or having duplicate contacts reported by more than one person.

Contacts are educational interactions with people. They are first reported by racial/ethnic categories (Race). Then, those same numbers are also reported by Other Identifiers on the right side of the table: Latino/Hispanic, Male/Female, and Adult/Youth. This means you will need to enter the total number reported on the left side of the table that fall into each of the categories on the right side of the table. Report contacts by Latino or Hispanic, Male/Female, and Youth. *The total of Male/Female contacts should equal the total number of contacts listed under Race for each line but Latino/Hispanic and Youth may not.* Contacts are categorized by Direct, Indirect, Media, and Other, ensuring that in-person contact numbers are not overwhelmed by newspaper readership and website hits.

General Data			Race							Additional Identifiers				Actions
Program Area	Contact Type	Date Reported	AM Ind / AK Native	Asian	Black or African AM	Native HI or Pac. Islander	White	More than one race	Total	Female	Male	Latino/ Hispanic	Youth	
		11/12/2008												Save
TOTALS			0	0	0	0	0	0	0	0	0	0	0	

Data Entry Instructions

1. Log on to SOARS using your university ONID login and password
   https://secure.oregonstate.edu/soars
2. Click on "Extension Contacts" under "Ongoing Reporting" on the SOARS homepage

3. If you have not yet created an Extension Contacts form for the current year, click "Add new Extension Contacts" at the top of the page

4. If you have already created a contact form for the current year, search for yours using your last name and click on your name to open the form

5. Enter the required information as outlined above.

Types of Contacts to Count in this Report

1. Contacts that are made directly with individuals through Extension programming. (e.g. face-to-face meetings, telephone consultation, or email responses - that involve educational content or solutions)

2. Contacts that are made indirectly through trained Extension Volunteers

3. Contacts made through the media (e.g. newspaper articles – in which case the readership for the paper is counted).

4. Other contacts – this includes website "sessions" or "visitors" (not "hits")

Tools for Keeping Track of Contacts

A PDF and Excel version of a contact form that may be useful for keeping track of your program contacts throughout the year, for entry into SOARS, can be found on the SOARS web page at http://extension.oregonstate.edu/employees/employee-resources/soars. Whether paper or electronic spreadsheet, these are just collection tools for your convenience; the ONLY way to submit your contact information is via SOARS! (Mailed or email forms will NOT be accepted!)

IMPORTANT: To determine the race of clientele, you can observe or ask. If you ask, it must be an "optional" question after someone is already considered "admitted" to the program, not as a condition for acceptance.

Extension Volunteers

Data collected under Extension Volunteers are counts of the number of volunteers by program area you work with during the year. There are two categories of volunteers to report:

1) Trained Volunteers- these are volunteers who receive specific training for the work they do with Extension. Examples include 4-H Leaders, Master Gardeners, etc.

2) Other volunteers- these are volunteers who assist with Extension programming but do not receive special training in order to fulfill their volunteer roles. Examples include infrequent volunteers who staff information tables, or help set up for an event.

NOTE: Volunteer contacts should be reported only once. If you are doing joint programming with another Extension educator, please determine who will report the volunteer contacts and enter the information one time only. This is especially important in the Trained Volunteer entry.

Data Entry Instructions

1. Log on to SOARS using your university ONID login and password
   https://secure.oregonstate.edu/soars
2. Click on "Extension Volunteers" under "Ongoing Reporting" on the SOARS homepage
3. If you have not yet created an Extension Volunteer report form for the current year, click "Add new Volunteer Contact Information" at the top of the page.
   Note: You will have different volunteer reports for each program area in which you work
4. If you have already created a volunteer report for a program area for the current year, search for yours using your last name and click on your name to open the form
5. Enter the required information as outlined above.

AVAILABILITY OF INFORMATION REPORTED IN SOARS

Anyone with SOARS access can view all reports of all SOARS users, except for professional development plans and reports (which are only viewable by a user's supervisory team).

VI. Annual Extension Program Area Plan of Work Update – Instructions for Extension Program Leaders
(*Program updates must be completed by Program Leaders annually by September 1*)

Important note: Program plans must be updated by September 1, which allows time for the plans to be reviewed by Extension Administration and modified as needed. Program plans will be locked into place on September 30th so that individual educators can begin planning on October 1. No modification to program area plans can take place after September 30th.

Extension program plans consist of the following:

1. **Extension program areas:**
    - 4-H Youth Development
    - Agriculture
    - Extension Administration
    - Extension and Experiment Station Communications
    - Family and Community Development
    - Forestry
    - Sea Grant

2. **Program Work areas**
    Under each program area are one or more "program work areas" (PWA's). Under each PWA, the following information is included:

    - **Rationale**: a statement of why the program work area is important to include in the plan of work.
    - **Stakeholder Input**: a description of how stakeholder input was <u>gathered</u> to inform the need for and outcome of the PWA.
    - **Stakeholder Input Use:** a description of how stakeholder input was <u>used</u> to inform the need for and outcome of the PWA.
    - **Long- term Outcome** for the PWA - a statement of the social, political, environmental, or economic change that will happen as a result of Extension programming in this area.
    - **Indicators of Success:** a description of how we will know that the long-term outcome has been achieved.

Program Update Instructions

1. The person updating the program area plan must be listed as an "Administrative" user in SOARS.

2. Log on to SOARS using your university ONID login and password.
   https://secure.oregonstate.edu/soars

3. Click on "Administration" on the left menu, then click on "List Management."

4. Click on "Program Work Areas" and a search page will open up.

5. Enter a search year, which will be the year following the current year. For example, if it is 2008, then search on 2009 to update the plan for the next year.

6. Program plans will "roll over" from the previous year into the new year, and then modifications can be made as needed- so you will be looking at the previous year's plan.

   NOTE: Agriculture has separate plans for each sub-program area. Click on the sub-program plan to update, not on the general agriculture plan (which only contains the innovative and flexible time fields).

7. Click on any program plan to bring up the program work areas under that program area.

8. Click on a program work area to edit information for the next year. If a plan is no longer valid, it can be deleted.

9. If there is a new program work area that needs to be added, click on "add a new work area" and enter the required information.

Writing Impact Statements for Oregon Extension Programs

Technical Structure and Helpful Hints

TITLE

The impact statement title is a short descriptive statement that identifies the main idea or theme of the report. The title should give a reader a pretty good idea of what subject area will be addressed in the report. A title should not be too wordy.

ISSUE

Describe in one or two sentences the issue that is being addressed by the program. This section should identify who cares about this issue and why the issue is important enough to be addressed by the Extension program. The issue statement should identify information that demonstrates that the issue is a problem. Avoid making sweeping statements that are not supported by some evidence that the issue is a problem or a priority in the county, district, or statewide.

WHAT HAS BEEN DONE

Briefly share what program activities were conducted. This information comes from the "outputs" section of the program's logic model. Program activities are those things that you did to deliver the educational program to achieve the objectives of the program. Program activities can include group educational meetings, one-on-one meetings with clientele, field days, tours, etc. When describing the program activities, identify the subject matter covered in the activities. Identify the quantity of program activities as much as possible. Instead of saying, "the program was delivered through group meetings and one-on-one consultation with program participants," you should identify specific numbers of activities, such as, "A series of four 4-H volunteer leader trainings were held, with a total of 82 potential new leaders attending."

IMPACT

The impact section is where you describe what happened as a result of the efforts described in the "What has been done" section. The impact described should reflect what has happened to the program participants as a result of their participation. This information comes form the "outcomes" section of the logic model. Ideally, program impact will be demonstrated at the medium or long-term level

- What changes have taken place in the participants' knowledge, skills, attitudes or aspirations (KASA) (short-term);
- What practices or behaviors have been adopted or used to a greater degree (medium-term);
- and what social, economic or environmental changes have occurred as a result of the adoption of those practices (long-term).

The changes that have occurred must be supported by evidence collected as part of the program evaluation process. Quantitative evidence is best, and should be used as much as possible. Although somewhat less effective, qualitative and anecdotal evidence can also be used to

document impact of programs if quantitative data are not available. The combination of quantitative and qualitative evidence can be powerful evidence of impact.

Remember, data reported in this section need to be based on the program's outcomes, not outputs. Therefore, data about number of clients, workshop participants, etc., although quantitative, are not appropriate for this section.

Types of Quantitative Data

- Comparison with established data norms or benchmarks (e.g., high school graduation rates for your program compared to those not participating in your program.
- Data showing knowledge, attitude, skills and/or aspiration changes
- Changes in knowledge scores
- Percent change in knowledge
- Actual change scores (e.g., the average knowledge increased from 50 correct on the pre-test to 75 on the posttest)
- Data concerning practice changes
- Number or percentage of people who adopted new practices/behaviors
- Actual number of individuals changing (e.g., the number of individuals washing their hands before preparing food increased from 25 to 73)
- Data concerning social, economic or environmental conditions
- Calculation of cost/benefit ratio
- Numbers of people who benefited
- Increases in yield or income
- Decreases in actual number of cases (e.g., resulted in a reduction of two applications of pesticide)

Types of Qualitative Data

Qualitative data in impact statements usually are quotes taken from comments collected as part of the program evaluation. The most useful qualitative data are the perceptions and opinions expressed by program participants or by external, unbiased observers of program results. A statement by an Extension agent that the program had a positive impact on participants or the community sounds a little self-serving, but a similar comment from a participant, a parent, a teacher or a community leader is strong evidence of the impact of the program. When using qualitative evidence, be sure to identify the source of the comment, not by name, but by title (e.g., program participant, a parent, a teacher, etc.).

Why are these data important?
The data you use as evidence of impact may be adequate in explaining the value of the program. However, you need to include a short statement clarifying the value of the outcomes described. For instance, if the impact of the program is increased knowledge of the participants, you need to identify what the value of having this knowledge will be to the participants (e.g., youth increasing their knowledge of educational requirements for their desired careers will help them as they select their courses in high school or change their post-secondary education plans).

FUNDING SOURCES

Identifying funding sources of a program can help show how we often utilize resources from a variety of sources to conduct our programs. This section is especially important if the program receives funding support from sources other than regular Extension funds. Identify the sources of funds that have helped in the planning and delivery of the program, including regular Extension funds. Examples of external funding sources might be: grant providers, local businesses, commodity groups, professional organizations, etc.).

CONTACT(S)

Identify the contact person (s) for someone who wants more information about the program. Include the following information about each person identified as a contact:

- Name and title
- Address
- County
- Phone number, fax, e-mail, website

** The information in this publication was adapted from <u>Writing Extension Impact Statements</u> by Richard L. Poling, Associate Professor and Program Development Specialist, University of Arkansas Cooperative Extension. Adapted with permission. We are grateful for Dr. Poling's generous leadership in this area.

To understand the importance of impact in program development and reporting, refer to a relevant *Journal of Extension* article entitled "Program Development in a Political World – It's All About Impact!" (available at http://www.joe.org/joe/2003february/a6.shtml).

VIII. Questions? Need More Help with SOARS?

If, after reading the Data Entry Manual, you still have questions, contact your SOARS program area contact. They are listed on the Extension SOARS page at http://extension.oregonstate.edu/employees/employee-resources/soars.