



Program Planning Workbook

A tool for Local Phenology Programs to plan and implement long-term phenological monitoring programs.

USA-NPN Education & Engagement Series 2025-002

USA npn
National Phenology Network



**nature's
notebook**
A project of the USA-NPN

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This is a companion workbook to the **Local Phenology Program Handbook**, USA-NPN Education & Engagement Series 2025-001, which can be found at www.usanpn.org/community/LocalPhenologyPrograms/Guidance

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PROGRAM PLANNING WORKBOOK

The Program Planning Workbook was created to aid Local Phenology Leaders in planning a long-term Local Phenology Program in *Nature's Notebook*. *Nature's Notebook* is the USA National Phenology Network's flexible platform that professionals and volunteers use to collect data on the timing of plant and animal seasonal cycles.



The Workbook is a companion to the **Local Phenology Program Handbook**, which provides an overview of how to get started with setting up a Local Phenology Program in *Nature's Notebook*. The Workbook is your tool for planning out your Program. We welcome you to jot down thoughts in the different sections and revisit them later after you have worked through the complete set of steps.

This Workbook walks you through the six steps of program planning and implementation:

1. **Impact statement:** Outline an impact statement that is S.M.A.R.T. - Specific, Measurable, Achievable, Relevant, and Time-bound.
2. **Phenology question:** Create a framework to guide your data collection efforts.
3. **Short, medium, long term program goals:** Plan what you hope to achieve over the next 1, 2, 5 years.
4. **Action plan:** Map out who you will engage, what resources you have, what resources you need, and the steps you will take to get to your goal.
5. **Sustainability plan:** Document the nuts and bolts that someone would need to know to continue the program in your absence.
6. **Document your impact:** Plan to track your progress toward meeting your goals each year.

This Workbook was adapted from the USA-NPN 2018 The Local Phenology Program Guide: An experiential education tool for site-based community engagement. USA-NPN Education & Engagement Series 2018-001. Prior USA-NPN staff members LoriAnne Barnett and Samantha Brewer created much of the content in this workbook.

1. IMPACT STATEMENT

Our first step is to create an Impact Statement. What do you hope to achieve with your Local Phenology Program? Your impact should be S.M.A.R.T. - Specific, Measurable, Achievable, Relevant, and Time-bound.

FIRST, CREATE A RELEVANCE STATEMENT

Why should your organization observe phenology using *Nature's Notebook*? If you can answer this question, then you can strategically develop a relevance statement related to embarking on the establishment of a long-term two-year or more) phenology monitoring program for your area.

Here are some additional questions to consider:

- Are your needs based upon desired outcomes for scientific or education program goals that you have not been able to achieve?
- Will working with volunteers to collect data, even if you are not an educator or volunteer coordinator, help you obtain enough consistent phenology data to answer a research or management question?
- Will data help you educate your community about seasonal or climatic change?
- Will it help students engage in hands-on learning or experience the scientific process?

Now, think about how you might form these needs into a statement about the relevance of phenology to your organization or community.

Example:

Our program needs activities for visitors that will provide educational information about seasonal plant and animal changes in native species.

RELEVANCE STATEMENT:

SECOND, TURN YOUR RELEVANCE STATEMENT INTO AN IMPACT STATEMENT

Your relevance statement can then be turned into an impact statement that describes the thing you'd most like to achieve based upon participating in the program. Turn your relevance statement into a S.M.A.R.T. (Specific, Measurable, Achievable, Relevant, and Time-bound) impact statement by using the following formula:

Our goal is to...

Action you will take

Quantifiable and measurable statement

Desired Outcome

Example:

Our goal is to train our volunteers in using Nature's Notebook to monitor the phenology of four native species weekly for at least three years so that our volunteers will gain experience in scientific data collection, better understand the phenology of native species, and educate visitors about the seasonal cycles of plants and animals.

IMPACT STATEMENT:

2. PHENOLOGY QUESTION

Having a phenology question helps provide context for your program. It helps your participants understand why phenology data may be important locally and it offers a framework for sharing data each year to keep them engaged.

Examples:

When are wildflowers blooming at our site?

How does the timing of fall color at our site compare to other areas in the country?

Is the timing of leaf out of maple trees getting earlier at our site?

Are milkweed leaves available when monarchs arrive at our site?

How does the timing of leaf out of oak trees compare to the timing of migrating birds visiting our site?

Does the timing of bird nesting differ between our two sites at different elevations?

When can visitors expect to see butterflies at our site?

PHENOLOGY QUESTION:

3. SHORT, MEDIUM, LONG-TERM PROGRAM GOALS

Once you have a broad idea of your program's relevance and goals, it's time to break those goals down into what can be achieved on different timelines. What do you hope to achieve on different timelines for your program?

It might be helpful to first think about some of the longer-term goals you'd like to achieve and then work backwards to fill in some shorter-term goals that will be measures of success along the way.

Each of these goals should include the following formula:

By (time)

Who or what is affected

What action will be taken

The expected results

Examples:

By the first year, leadership will recruit 20 volunteers to monitor phenology at our park. (short term)

By the second year, volunteers will collect phenology data weekly to document seasonal changes. (medium term)

By the fifth year, leadership will analyze the results and develop materials to educate our visitors about the phenology of our plants and animals. (long term)

SHORT-TERM GOALS (for the next 1-2 years):

MEDIUM-TERM GOALS (for the next 3-4 years):

Empty box for medium-term goals.

LONG-TERM GOALS (for the next 5+ years):

Empty box for long-term goals.

4. ACTION PLAN

Who will you engage, what resources do you have, what resources do you need? What are the steps you will take to realize your goal?

IDENTIFY PARTICIPANTS

Your participants are the individuals who you will try to recruit as observers. Think about what audiences you will try to reach in your recruitment efforts.

Example:

Summer interns with our organization, Master Naturalist volunteers

PARTICIPANTS:

IDENTIFY PARTNERS

Your partners are the people who share an interest in your program. Think beyond the people who will be participating in your activities and consider the entire program.

Example:

Internal staff, volunteers, students, visitors, donors.

PARTNERS:

IDENTIFY RESOURCES

Identify what resources you have and what resources you will need to maintain your program.

Example:

Staff members, volunteers, budget, equipment, materials, website, social media, space for training, time, knowledge, curriculum.

RESOURCES:

MOVE FROM IDEAS TO ACTION

Now that you have identified your program goals and resources, it's time to turn them into actionable activities. These activities can include hosting a workshop, recruiting volunteers, creating photo guides, or writing annual reports. To ensure that each activity helps you reach your project goals, be sure to outline the following:

1. The name of the activity
2. Which goal the activity best supports
3. The specific person responsible for executing the activity
4. Resources available to complete the activity
5. Potential barriers and plans to overcome them
6. Timeline for completion

Example:

Goal	Activity	Person	Resources	Barriers	Timeline
Train 20 volunteers for weekly monitoring by March	Volunteer Training Workshop	Volunteer Coordinator	Advertisements (poster, social media), icebreaker game materials, outdoor space, datasheets, clipboards, pencils, water bottles, snacks	In case of inclement weather, use common room and laminated plant photos	Workshop is March 15 from 9am-12pm February - post flyers, social media posts on Mondays

ACTION PLAN:

Goal	Activity	Person	Resources	Barriers	Timeline

5. SUSTAINABILITY PLAN

What are the details that someone would need to know to continue your program in your absence? A sustainability plan is valuable in the event that you and other founding leaders are no longer able to work on your program. It includes details about your Program that are not included in the other aspects of this Program Planning Handbook.

Your sustainability plan should include information on the following:

Local Phenology Program Details

- A list of administrators, partners, and/or volunteers, and their contact information
- General information about the purpose of the program, including the short, medium, and long-term goals of the program
- Map describing the location and characteristics of the plants being observed or sites where animals are being observed
- Locations of important files or program signs and templates

Financial Information

- Financial resources available for your program
- How might you continue this Program, or modify it, if financial resources change?

Administrative Support

- What will you do if your administration no longer supports this project?
- Is there someone else in the community willing to take over the program? If so, who is that person and how can they be reached?

Recommendation: Share your plan with someone else who is unfamiliar with what you are doing. Ask them if they can understand what you've documented. If so, then in your absence, the next person to take on your role will be able to understand what to do first and next.

Consider the following information:

[Program Instructions](#)

[Financial Information](#)

[Plans for changes in program administration](#)

Example:

Our program is led by the following administrators... Maps of our monitoring sites, education templates, and past reports can be found in the shared folder. Our budget is as follows, with funding from the listed sources. Upon termination of this funding, our program will... If administrative support shifts, please contact the following partners to plan continuation of the program...

PROGRAM DETAILS (INCLUDING LPP NAME, ADMINISTRATORS, CONTACT INFORMATION):

PROGRAM MATERIALS (INCLUDING LOCATIONS OF ANY DIGITAL OR PRINTED FILES SUCH AS SITE MAPS, PAPER DATASHEETS, PAST REPORTS, OTHER MATERIALS):

FUNDING INFORMATION:

[Empty box for funding information]

PLAN FOR CHANGES IN PROGRAM ADMINISTRATION (WHO WILL BECOME THE LEADER IF YOU DEPART):

[Empty box for plan for changes in program administration]

6. DOCUMENT YOUR IMPACTS

Each year, we invite you to take a step back and check in on the progress that you are making toward your goals. Creating an annual impact statement can help to keep track of your progress toward meeting your goals and the impact statement that you crafted for your LPP.

WRITE AN ANNUAL IMPACT STATEMENT

Impacts can be described and shared on an annual basis, based on your progress toward your goals. There are three key elements to a good impact statement:

Why did you develop this program?

How did you carry out your program goals?

What were the results of your program?

Example:

Plant phenology is a great indicator of environmental changes. Such data is not currently available in our area. Our LPP works to fill that gap by engaging people of all ages in phenology observation using Nature's Notebook. The goal of our project is to document the leafing, flowering and fruiting of common native plants. This data will help us measure the impact of environmental change, including climate change, so that we can more effectively respond and adapt.

We held workshops, created and shared resources, provided training and educational opportunities, and shared a monthly newsletter reporting observations from the past month.

In 2020, our second year, 62 observers made +62,500 observations at 48 sites in 24 counties in our state. Our observers monitored over 150 different species of plants including Eastern redbud, Tulip tree, Sugar maple, Bur oak and Canadian serviceberry and around 60 animal species. We are 26% of our way to our long-term goal of observing and collecting data in every county.

Don't forget to complete our Local Phenology Program Annual Survey at the end of each year. In this Survey, we will invite you to share your Annual Impact Statement. Your feedback is critical in informing new resources and soliciting support that we identify and develop for programs like yours.