

## Section 8 – EFNEP Annual Update/5-Year Plan

<b>SECTION 8 – EFNEP ANNUAL UPDATE/5-YEAR PLAN</b> .....	<b>1</b>
<b>BACKGROUND ON ANNUAL UPDATE/5-YEAR PLAN</b> .....	<b>3</b>
OVERVIEW OF THE REPORTING REQUIREMENT .....	3
<i>The Main Plan Page</i> .....	4
<i>Top Section – Main Plan Page</i> .....	<i>Error! Bookmark not defined.</i>
<i>Center Section – Main Plan Page</i> .....	4
<i>Bottom Section – Main Plan Page</i> .....	6
<i>Quick Tips</i> .....	7
<b>ANNUAL UPDATE CHEAT SHEET – BRIEF OVERVIEW OF INSTRUCTIONS</b> .....	<b>9</b>
<b>MIGRATE AN ANNUAL UPDATE/5-YEAR PLAN</b> .....	<b>11</b>
OVERVIEW OF MIGRATION.....	11
<i>Pre-Approved Sections</i> .....	13
<i>Sections you need to Update Each Year</i> .....	13
MIGRATION STEPS.....	13
<i>WebNEERS Instructions</i> .....	13
ENTER/REVISE PLAN INFORMATION AND DATA .....	15
<i>WebNEERS Instructions</i> .....	15
GENERAL INFORMATION AND PROGRAM PLAN.....	16
<i>Contact Information</i> .....	16
<i>Situation</i> .....	17
<i>Other Inputs</i> .....	19
PROGRAM PLAN AND RESULTS FROM PREVIOUS YEAR .....	21
<i>Budget Inputs</i> .....	22
<i>Program Priorities</i> .....	23
<i>Delivery Sites and Community Partnerships</i> .....	26
RESULTS FROM PREVIOUS YEAR .....	28
<i>Environmental Settings</i> .....	28
<i>Sectors of Influence</i> .....	32
<i>Impacts</i> .....	37
SIGNATURE.....	40
<i>Request Director Signature</i> .....	42
COMMENTS (OPTIONAL).....	44
<b>PLAN SUBMISSION</b> .....	<b>45</b>
UNDERSTAND ‘SUBMISSION STATUS’ .....	45
SUBMIT ANNUAL UPDATE/5-YEAR PLAN FOR FEDERAL REVIEW .....	45
CANCEL ANNUAL UPDATE/5-YEAR PLAN SUBMISSION.....	47
REVISE AND RESUBMIT ANNUAL UPDATE/5-YEAR PLAN .....	48
<i>Plan Marked “Needs Revision”</i> .....	48
<i>Plan Marked “Approved”</i> .....	49
CREATE NEW PLAN.....	51
<i>WebNEERS Instructions</i> .....	51
<b>CLONE AN ANNUAL UPDATE/5-YEAR PLAN</b> .....	<b>51</b>
<b>MANAGE DELIVERY SITES AND COMMUNITY PARTNERSHIPS</b> .....	<b>52</b>

<i>Edit Program Delivery Sites and Partnerships – Region Level</i> .....	53
<b>MANAGE PROGRAM IMPACTS</b> .....	<b>55</b>
<i>Add Program Impacts – Region Level</i> .....	56
<b>MANAGE COMMUNITY PARTNERSHIP IMPACTS</b> .....	<b>60</b>
<i>Add Community Partnership Impacts – Region Level</i> .....	62
<b>APPENDIX 1 – ENVIRONMENTAL SETTINGS INDICATORS</b> .....	<b>66</b>
SHORT TERM INDICATORS .....	66
MEDIUM TERM INDICATORS.....	66
LONG TERM INDICATORS .....	68
<b>APPENDIX 2 – SECTORS OF INFLUENCE INDICATORS</b> .....	<b>71</b>
SHORT TERM INDICATORS .....	71
MEDIUM TERM INDICATORS.....	71
LONG TERM INDICATORS .....	74
<b>APPENDIX 3 – CLARIFICATIONS OF PLAN ITEMS</b> .....	<b>76</b>
SELECTING INDICATORS FOR ENVIRONMENTAL SETTINGS AND SECTORS OF INFLUENCE.....	76

## Background on Annual Update/5-Year Plan

The Annual Update/5-Year Plan is the program plan each Land-Grant University must write and submit for approval. It is one of the Expanded Food and Nutrition Education Program's (EFNEP) yearly reporting requirements. Each year either an Annual Update or a 5-Year Plan is due; not both. The Annual Update/5-Year Plan is completed through the Web-Based Nutrition Education Evaluation and Reporting System (WebNEERS). The Annual Update/5-Year Plan is important because without approval, Federal Funds (first quarter funds of the next fiscal year) will not be released to the university.

## Overview of the Reporting Requirement

	5-Year Plan	Annual Update
<b>Brief Description</b>	A strategic plan of what is to be accomplished over the next five years – includes some reporting of results from the previous year.	An update/revision to the proposal reported through the 5-Year Plan – includes some reporting of results from the previous year. <a href="#"><u>**Please Migrate the Approved Plan to complete the Annual Update.</u></a>
<b>Due Date</b>	July 1 <sup>st</sup>	July 1 <sup>st</sup>
<b>Frequency of Submission</b>	Once every five years (FY2016, FY2021, etc.). *	Once per year except years in which a 5-Year Plan is due. *
<b>Information Required</b>	Narrative information and data related to the situation, inputs, outputs, program priorities, outreach in environmental settings, outreach in sectors of influence, and impacts.	Same as the 5-Year Plan.
<b>Review Process</b>	Formal Federal review.	Federal review for accuracy and completeness.

\*Process for handling Annual Updates if a new Extension Director/Administrator is hired after the 5-Year Plan is approved. The incoming Director/Administrator has the option to let the previous administrator's signature serve as approval from the office for the remainder of the 5-year plan period or the incoming Director/Administrator may choose to review the annual update themselves their first year for the remaining 5-year plan period.



If the incoming Director/Administrator **chooses to use the previous administrator's signature**, then coordinators should **migrate and edit the annual updates** as usual only changing the administrator's name in the contact info section of the annual update.

Alternatively, if the incoming Director/Administrator **chooses to review the annual update**, then coordinators should **clone the previous year's file, migrate the cloned file and edit the annual update**. Cloning will remove the previous administrator's signature. Coordinators can edit the name in the

contact info section and when they are ready to submit they can send the annual update to the new administrator for signature before it is submitted to the national office.

## The Main Plan Page

The Annual Update/5-Year Plan has a main plan page. The main plan page is what is seen when the plan is first established, as well as what is seen when opening an existing plan. The top provides descriptive information about the plan, the center includes buttons to access each section of the plan, and the bottom includes options for managing the submission and migration of the plan.

### Top Section – Main Plan Page

Title: Example Program Plan  
Fiscal Year: 2015  
Last Modified: 05/06/2015  
Status: Draft

Plan Information

Print Option & Comments Feature

Print

Comments

### Center Section – Main Plan Page

#### Section Groupings

The buttons for each section of the plan are grouped according to the type of information/data needed in the report.

General Information & Program Plan

Contact Info

Situation \* Required Data Missing

Other Inputs \* Required Data Missing

Results from Previous Year

Environmental Settings \* Section is empty

Influence \* Section is empty

Impacts \* Section is empty

Program Plan & Results from Previous Year

Budget Inputs \* Section is empty

Program Priorities \* Required Data Missing

Delivery Sites and Partnerships \* Required Data Missing

Signature (Only required for 5-Year Plans)

Request Director Signature

Section Groupings

1. General Information and Program Plan – The buttons under this heading capture the contact information for the program and the overview of intended accomplishments in upcoming years.

2. Program Plan and Results from Previous Year – The buttons under this heading serve a dual purpose. They provide an overview of intended accomplishments in upcoming years, as well as report some of the results achieved.
3. Results from Previous Year – The buttons under this heading report results from the previous year.
4. Director Signature – The button under this heading is used to secure your Extension Director or Administrator’s signature.



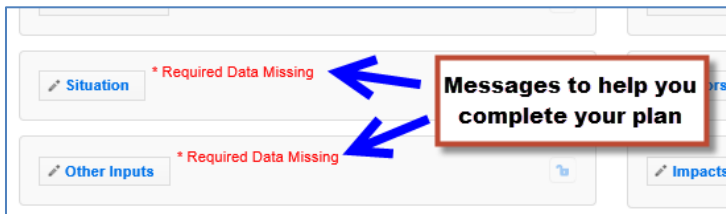
*Plans are submitted in July which is in advance of the next fiscal year. For example, the FY2017 Annual Update is due July 01, 2016, which is 3 months prior to the start of FY2017. This means that the results reported “from the previous year” will technically be for the previous fiscal year (in this example FY2015) and include projections for the remainder of the year.*

---

### **Red Asterisk Messages**

---

The center section includes **red asterisk messages** are alerts to sections within which required data is missing and to sections that are empty. A plan cannot be submitted if required data is missing. If **no red asterisk messages** is present, the plan can be submitted. Those sections are optional; the message serves as a visual cue that something additional can be included. Red asterisk messages disappear when addressed.





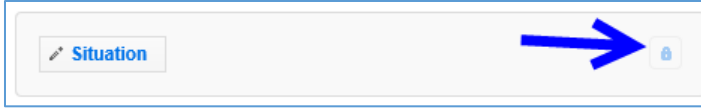
*There may be years when the Federal Budget is passed late in the year. In these rare cases, the Budget Inputs section will be empty when the Annual Update is submitted.*

---

### **Lock Feature**

---

The **lock**  and the **unlock icons**  on the main plan page help identify the current status of each section: locked = approved; unlocked = not approved or not yet approved.



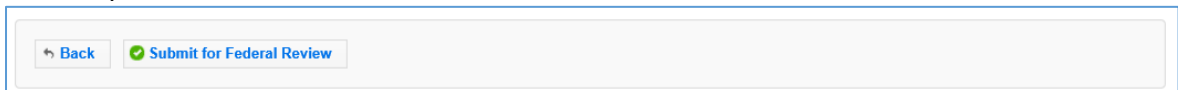
Locked sections prevent users from making edits. For plans that are:

- a. “Under Review”, sections are locked because the National Office is in the process of reviewing the plan.
- b. “Approved” or “Needs Revision”, sections are locked because the information contained in that section is approved by the National Office and does not need further editing.
- c. Migrated into the next programming year, sections are locked because the data was approved the year prior and if still accurate, can be resubmitted without any additional edits.

Locked sections should only be unlocked if edits are needed. Instructions for unlocking a section are in the [Plan Marked “Approved”](#) section below.

### **Bottom Section – Main Plan Page**

This section of the plan changes based on the status of the plan. This is an example from a plan that was revised after it was sent back as “Needs Revision”.



*The submission button will only be visible if the Director’s approval has been completed.*

---

### **New Extension Director/Administrator**

*Annual Updates, when a new Extension Director/Administrator is hired after the 5-Year Plan is approved, are to be handled at the discretion of the Institution. The incoming Director/Administrator has the option to let the previous administrator’s signature serve as approval from the Office for the remainder of the 5-year plan period or the incoming Director/Administrator may choose to review the annual update themselves their first year for remainder of the 5-year plan period. See Annual Update Cheat Sheet for additional information.*

## Quick Tips

### Entering Data

The Annual Update/5-Year Plan was set up so you can enter all of your information at once or enter it one section at a time. This means you can save a section within your plan and return later even if some fields (even required ones) are incomplete. This is different than other data entry screens in WebNEERS.

### Cancel, Save, and Save and Next Buttons

The **Cancel**, **Save**, and **Save and Next** buttons are located at the bottom of each section. The **Cancel** and **Save** buttons will cancel or save edits made in the section and return you to the main plan page. The **Save and Next** button saves any edits made in the section and advances you to the next section so you can keep working. All required fields must be complete to submit the plan, but as mentioned above, they do not have to be complete to save your changes.

### Multiple Users

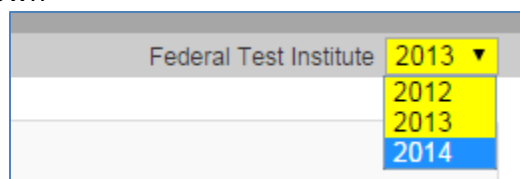
The Annual Update/5-Year Plan can be edited by any Institution Level user who has permission to access the **Manage Annual Update Section**. If someone is already editing a section, a message will display at the top of the screen. When this happens, close the section and wait for the other user to finish. Do not make edits when someone else is in the section. This is important because changes made by one user may override changes made by another user if edits are made at the same time.



### Switching Years – Finding Your Plan

Your plan may reside in a different year than the current reporting year. When this happens, use the year dropdown on the top right of the WebNEERS home screen to change years. This is particularly important for the migration process.

1. If you are not in the year that contains your plan, select the correct year in the dropdown





Note:

*The years listed in your dropdown may vary from the screenshot above.*

2. Click **OK** to confirm that you want to switch years
3. Remember to switch back to the current year after you finish what you are doing!



Note:

*If completing an Annual Update on an Approved Plan, it will be important to return to the year in which the plan was approved and migrate the data to the appropriate program year.*



## Annual Update Cheat Sheet – Brief Overview of Instructions

If you have completed an Annual Update in the past, you may not need all of the detailed instructions. This overview walks you through the steps at a high level. For detailed instructions, skip to p.10 or follow the links below to the appropriate sections.

### Note:

Plans are submitted in July which is in advance of the fiscal year. So, for example, the FY2018 Annual Update is due July 01, 2017, which is 3 months prior to the start of FY2018. This means that the results you report “from the previous year” will technically be from the last fiscal (in this example FY2016) and include projections for the remainder of the year.

## New Extension Director/Administrator

The incoming Director/Administrator has the option to let the previous administrator’s signature serve as approval from the Office for the remainder of the 5-year plan period or the incoming Director/Administrator may choose to review the annual update themselves their first year for remaining the 5-year plan period.

### Note:

If the incoming Director/Administrator **chooses to use the previous administrator’s signature**, then coordinators should **migrate and edit the annual updates** as usual only changing the administrator’s name in the contact info section of the annual update.

### Note:

If the incoming Director/Administrator **chooses to review the annual update**, then coordinators should **clone the previous year’s file, migrate the cloned file and edit the annual update**. Cloning will remove the previous administrator’s signature. Coordinators can edit the name in the contact info section and when they are ready to submit they can send the annual update to the new administrator for signature before it is submitted to the national office.

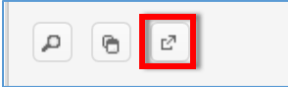
1. As an Institution Level user, use the dropdown to select the year containing the Annual Update/5-Year Plan you wish to migrate forward into the current reporting year.


Federal Test Institute	2013 ▼
	2012
	2013
	2014



*It is important to migrate approved plans forward, as each year, of the 5-Year Plan, builds upon the information entered from the previous years.*

2. Click on **Manage Annual Update / 5-Year Plan**
3. Locate your “Approved” plan, click the migrate button, and follow the steps to migrate your plan into the new year (see [Migration Steps](#) section for detailed instructions)



4. Move into the new year using the year dropdown
5. Click on the “” icon to open the migrated plan.
6. Revise/Update your plan as follows (see [Enter/Revise Plan Information and Data](#) section for detailed instructions on completing each section)

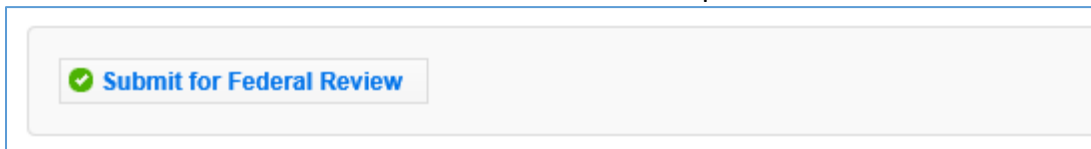
SECTION	WHAT YOU NEED TO DO
<b>Contact Info</b>	Review for accuracy. If changes are needed, unlock the tab and make them. If not, continue to the next section.
<b>Situation</b>	Review for accuracy. Think about what you intend to do in the coming year. If changes are needed, unlock the tab and make them. If not, continue to the next section.
<b>Other Inputs</b>	<p>Review for accuracy. Think about what you intend to do in the coming year. If changes are needed, unlock the tab and make them. If not, continue to the next section.</p> <p><i>Use of Technology:</i> Coordinator will need to indicate the level of technology integration (low, medium, high) and strategies to be utilized. This information will be added to the Curriculum section. Implementation of a high level of technology will require prior approval from the National Office. No action will be needed if there is no change in the current use of technology or if no technology will be used.</p> <p><i>Use of Volunteers:</i> Coordinator will need to indicate what types of volunteers will be used and what duties volunteers will have. This information will be added to the Inter-Organizational Relationships section. Implementation of a Formal Volunteer Program will require prior approval from the National Office. No action will be needed if there is no change in the current use of volunteers.</p>
<b>Budget Inputs**</b>	Complete Other Funds Received Chart and Description, if applicable. If not continue to the next section.
<b>Program Priorities</b>	For each priority, update the table with your most recent “Actual” value (e.g., for the FY2017 Annual Update, the last complete data set is 2015, so you enter the corresponding value in the 2015 column/“Actual” row). If you need to adjust future year targets or if you need to explain your results, use the comments field at the bottom.

SECTION	WHAT YOU NEED TO DO
<b>Delivery Sites and Community Partnerships**</b>	Have regions complete their Delivery Sites and Community Partnerships chart or add it at the <u>Institute Level</u> (see <a href="#">Manage Delivery Sites</a> section for detailed instructions). Update the description, if needed.
<b>Environmental Settings**</b>	Review for accuracy. Report accomplishments, not items you plan to work on. If changes are needed, make them. If not, continue to the next section.
<b>Sectors of Influence**</b>	Review for accuracy. Report accomplishments, not items you plan to work on. If changes are needed, make them. If not, continue to the next section.
<b>Impacts**</b>	Have regions enter their Program Impacts and Community Partnership Impacts or add them at the <u>Institute Level</u> (see <a href="#">Manage Program Impacts</a> and <a href="#">Manage Community Partnership Impacts</a> sections respectively for detailed instructions). Select the ones you want to include using the checkboxes.
<b>Signature</b>	No action is needed; the signature is already attached.
<b>Comments</b>	Review comments from the previous year and address any pending items. Add comments if there are items you need to explain to the National Office that are beyond what you included in the various sections.



*\*\*Data/information reported for sections with the double asterisks above should be for the fiscal year that ends September 30 and should include projections for the remaining months of the year (if applicable) – e.g., for the 2018 Annual Update, FY2017 data should be reported including projections for the upcoming months between now and the end of September.*

7. Click **Submit for Federal Review** at the bottom of the plan



## **Migrate an Annual Update/5-Year Plan**

### **Overview of Migration**

On Annual Update years, you have the option to migrate your plan into the new reporting year. This allows you to work from your existing plan rather than starting from scratch. Please note that the migration affects each section of the plan differently. This chart explains which

sections carry their data forward when you migrate, whether or not the section is locked (pre-approved) and whether you need to fully update a section or simply need to review it and make revisions, where needed.



**Note:**

*If you choose not to migrate the plan, you will be required to enter Program Priorities information from previous years of the 5-Year Plan. Securing the Directors Signature may also be required before you will be able to submit your plan for federal review.*



**Note:**

*If you have a new Director/Administrator who **chooses to review the annual update**, then coordinators should **migrate a clone the previous year's file**.*

**Table 1: Overview of Migration**

Section	Does Data Carry Forward to New Year?	Locked?	Action Required
<b>GENERAL INFORMATION &amp; PROGRAM PLAN</b>			
Contact Info	YES	YES	Review. Revise, if needed
Situation	YES	YES	Review. Revise, if needed
Other Inputs	YES	Yes	Review. Revise, if needed
<b>PROGRAM PLAN &amp; RESULTS FROM PREVIOUS YEAR</b>			
Budget Inputs	NO	NO	Update
Program Priorities	YES	NO	Update
Delivery Sites and Partnerships	Chart = NO Description = YES	NO	Update
<b>RESULTS FROM PREVIOUS YEAR</b>			
Environmental Settings	YES	NO	Review. Revise, if needed
Sectors of Influence	YES	NO	Review. Revise, if needed
Impacts	NO	NO	Update
<b>SIGNATURE</b>			
Request Director Signature	YES	YES	None, unless the Federal Office specifically requests



**Note:**

*You can migrate multiple plans or you can migrate the same plan multiple times, if needed, but you should only submit one to the Federal Office.*

## Pre-Approved Sections

The **Contact, Situation, Other Inputs, and Request Director Signature** sections are pre-approved (locked) from your previous year's submission. They only need to be unlocked if something has changed and you need to make revisions. If you leave them locked, it indicates to the Federal Reviewer that nothing changed. If you unlock them, they have to undergo Federal review for approval.

### When Pre-Approved Sections Require Unlocking

*If your Institution is changing the way in which volunteers are used and/or the roles they play within the program or if increased use of technology will occur, the Other Inputs section must be unlocked.*

#### To unlock a section:

1. Click the button to open the section



2. Click the “ ” button on the top right of the screen
3. Click **Ok** on the warning message to confirm that you want to unlock and edit the section or **Cancel** to return to the preview of the page without unlocking it

#### Note:

*If you unlock a section by mistake, you can still cancel the change by clicking cancel at the bottom of the screen*

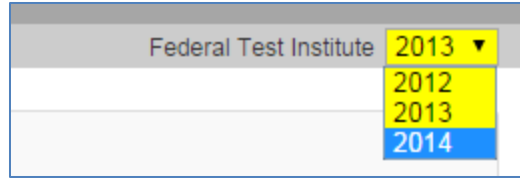
## Sections you need to Update Each Year

The **Budget Inputs, Program Priorities, Delivery Sites and Community Partnerships, Environmental Settings, Sectors of Influence, and Impacts** sections must be revised each year. These sections are unlocked. You can simply make edits/additions to them and click save. These undergo Federal review for approval.

## Migration Steps

### WebNEERS Instructions

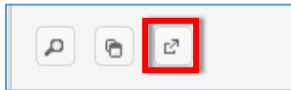
1. Log in as an Institution Level user
2. Use the year dropdown on the top right to select the year containing the Annual Update/5-Year Plan you wish to migrate forward into the new year



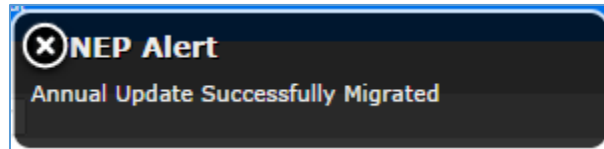
**Note:**

*The years listed in your dropdown may vary from the screenshot above.*

3. Click **OK** to confirm that you want to switch years
4. Select **Manage Annual Update/5-Year Plan** from the **WebNEERS Home Page**
5. Locate your "Approved" plan and click the migrate button



6. Use the dropdown to select the reporting year you wish to migrate Annual Update/5-Year Plan into
7. Click **Migrate** to migrate the plan into the selected year or click **Cancel** to return to the plan without migrating
8. Watch for a message in the top right that the migration was successful



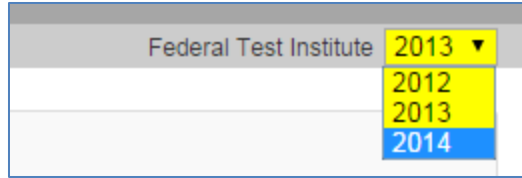
**Note:**

*Sometimes the alert message is quick, if you do not see it, try moving on to step 9. If your plan is not listed in the year you tried to migrate it into, return to step 2 and try again! If you get a red alert message, contact the [help desk](#) for assistance.*


**Note:**

*Your Manage Annual Updates page will refresh, but you will not see the migrated plan. You have to change to the year you migrated the plan to see the migrated plan (Step 9).*

9. Use the year dropdown on the top right to switch to the year you migrated your plan into.





The years listed in your dropdown may vary from the screenshot above.




10. Click “OK” to confirm that you want to switch years.
11. Click on the “” icon to open the migrated plan. The migrated plan will be tagged “Migrated” and have the date it was migrated in the **Plan Name**.
12. Follow the instructions in the [Enter/Revise Plan Information and Data](#) section to complete your plan.

## Enter/Revise Plan Information and Data

If you just created the plan, you will automatically land on the main plan page. Please skip ahead to the [General Information and Program Plan](#) instructions below. If you are accessing a plan you created earlier, follow these steps to open your plan.

### WebNEERS Instructions

1. Log in as an Institution Level user.
2. Select “**Manage Annual Update/5-Year Plan**” from the **WebNEERS Home Page**.
3. Locate your plan in the table. The table displays the most recently updated plan at the top, but you can click the up/down arrows in any column to re-sort ascending or descending or use the SEARCH option to quickly locate your plan.
  - a. Use the “” icon to edit your plan or the “” icon to preview your plan.

SEARCH: <input type="text"/>		SHOW <input type="text" value="10"/> ENTRIES		
Manage	Plan Name	Fiscal Year	Status	Last Modified
  	Example Program Plan	2015	Draft	2015/05/06 21:46:49



**Note:**

You will see either the edit or the preview icon. The edit icon is only visible if the plan's status is draft. If the plan has been submitted or returned, the preview icon will be visible.



**Note:**

If there is a plan you no longer need, use the “✖” icon to delete the plan. The delete icon is only visible if the plan has not been submitted; you cannot delete a plan if it has been submitted to the Federal Office.

## General Information and Program Plan

The buttons included under the **General Information and Program Plan** grouping include: **Contact Information**, **Situation**, and **Other Inputs**. The buttons under this heading capture the contact information for your program and the overview of what you intend to accomplish in upcoming years. These need to be reviewed each year and revised, as needed.

Figure 1 - Main Plan Page: General Information & Program Plan

The screenshot shows a web interface for plan management. The main heading is "General Information & Program Plan". Below this heading, there are several rows of buttons, each with an edit icon (pencil) and a preview icon (eye). The buttons are: "Contact Info", "Situation" (with a red asterisk and "Required Data Missing" text), "Other Inputs" (with a red asterisk and "Required Data Missing" text), "Budget Inputs" (with a red asterisk and "Section is empty" text), "Program Priorities" (with a red asterisk and "Required Data Missing" text), "Delivery Sites and Partnerships" (with a red asterisk and "Required Data Missing" text"), "Environmental Settings" (with a red asterisk and "Section is empty" text), "Sectors of Influence" (with a red asterisk and "Section is empty" text), "Impacts" (with a red asterisk and "Section is empty" text), and "Request Director Signature". The "Contact Info" button is highlighted with a blue border. To the right of the main heading, there is a section titled "Results from Previous Year" which is currently empty. Below the main heading, there is a section titled "Program Plan & Results from Previous Year" which is also empty. At the bottom right, there is a "Signature" section with a "Request Director Signature" button.

### Contact Information

The **Contact Info** section is completed when you create the plan (see above) so you may only need to open this section on Annual Update years to review and revise, as needed.



**Annual Update Years:** If you migrate your plan, this section is locked and is pre-populated with the information from the previous year. Only unlock it if you need to make edits, otherwise it is pre-approved.

Note:

If there is a new Director/Administrator, do not migrate the plan directly. Create a clone of the previous year's file and migrate the cloned file.

---

### **WebNEERS Instructions**

---

1. From the main plan page, click on the **CONTACT INFO** button.
2. Enter/revise the information as needed.
3. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

### **Situation**

**Annual Update Years:** If you migrate your plan, this section is locked and is pre-populated with the information from the previous year. Only unlock it if you need to make edits, otherwise it is pre-approved.

---


### **WebNEERS Instructions**

---

1. From the main plan page, click on the **SITUATION** button.
2. Enter/revise the narrative description of your **Situation**.
3. Click the checkboxes to select/deselect your **Geographic Area**.
4. Enter/revise the narrative **Description of Geographic Area**.
5. Enter/revise the narrative description of the **Target Audience**.
6. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

## Description of Fields

Name of the Field	Description
<b>Description of Situation</b>	<p>Provide a general description of the situation in your state/territory that justifies the need for the program. Include any relevant statistics (e.g., poverty levels, obesity rates, etc.) as well as <u>external factors</u> or <u>assumptions</u> that may impact programming now or in upcoming years. The situation should be written so a person unfamiliar with the program can understand. It may include a public value statement. (2000 characters or less)</p> <p><i><u>External Factors</u>: elements in the environment which may positively or negatively influence programming. Examples include: cultural differences, the economy, politics, the media, etc.</i></p> <p><i><u>Assumptions</u>: principles, ideas, or beliefs that may influence decisions. Examples include: theories about the program, the people involved, or the way we think the program will work.</i></p>
<b>Geographic Area</b>	<p>Select the counties/parishes where your program will provide education during the upcoming fiscal year. If you do not provide education, but you have an important partnership in a location, do not check the box in this section. Instead, describe it in brief in the “Description of Geographic Area” section below.</p>
<b>Description of Geographic Area</b>	<p>For the locations selected above, please briefly describe the reasons they were selected. If there are locations you have partnerships with, but you did not select them above because you do not provide education there, you can briefly describe them here. Please include any plans to expand, eliminate or relocate programming in upcoming years along with an explanation of how and why. (2000 characters or less)</p>

Name of the Field	Description
<b>Target Audience</b>	<p>Define your target audience within programmatic guidelines and briefly describe how you are targeting them. If you intend to change your target audience or your approach to reaching them in upcoming years, briefly describe how and why. (2000 characters or less)</p> <p> <b>Note:</b> For EFNEP, this must include programming to low-income families and low-income youth. For further information see EFNEP's <a href="#">Policy Document</a>.</p>

## Other Inputs

**Annual Update Years:** If you migrate your plan, this section is locked and is pre-populated with the information from the previous year. Only unlock it if you need to make edits, otherwise it is pre-approved.

### Situations Requiring Unlocking

If your Institution is changing the way in which volunteers are used and/or the roles they play within the program or if increased use of technology will occur, the Other Inputs section must be unlocked and updated.

### WebNEERS Instructions

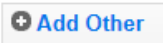
1. From the main plan page, click on the **OTHER INPUTS** button.
2. Enter/revise the narrative description of your **Curricula**.



#### Use of Technology

1. Indicate the Implementation Levels for the technology being proposed:
  - a. Low Implementation– Strategies may include, email/text messaging or similar existing resources.
  - b. Medium Implementation– Strategies may include, online makeup lessons, social media to reinforce, recruit, or review and follow-up with participants.
  - c. High Implementation\* – Strategies may include, blended lessons, interactive online lessons, or online group meetings.
2. Strategies Planned for integration into existing programming.

\*High technology integration requires prior National Office approval.

3. Select/revise the type of **Inter-Organizational Relationships**. Make sure you select one option for each row even if the relationship is “None”.
4. Use the “  ” button to add additional organizations not listed in the chart.
5. Enter/revise the narrative **Description of Inter-Organizational Relationships**.



**Use of Volunteers\***

1. List all type(s) of volunteers to be used.
  - a. Non-Agency Volunteers
  - b. Agency Paid Volunteers
  - c. Student/Intern Volunteers
2. Indicate what each volunteer type will do to support EFNEP.



*\*Formal Volunteer Program integration into programming requires prior National Office approval.*

6. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

---

**Description of Fields**

---

Name of the Field	Description
<b>Curricula</b>	<p>Name and briefly describe the key university approved curricula for adult and for youth programming. Describe curricula with respect to audience appropriateness, behavior change emphasis, and evidence-base. Make sure it is clear that each <u>core area</u> is addressed with adults and with youth. If you intend to change or revise curricula in upcoming years, briefly describe how and why. (2000 characters or less)</p> <p><i>Core areas (EFNEP): Diet Quality/Physical Activity, Food Resource Management, Food Safety, Food Security</i></p> <p> <i>Note: This should not be an exhaustive list of curricula, but rather a list of the primary curricula used across the state/territory.</i></p> <p> <i>Note: Some grades do not cover food resource management or food security. So, if you are only working with K-2<sup>nd</sup> or 3<sup>rd</sup>-5<sup>th</sup> grades, your youth curricula may not include all core areas.</i></p> <p>If technology will be used, indicate the level of implementation and strategies you plan to use.</p>

Name of the Field	Description
<b>Inter-Organizational Relationships</b>	<p>Review the list of agencies, organizations, and other partners in the table. For each partner you work with think about the relationship at the state/territory level. If you have more than one type of relationship with a particular agency, organization, or partner determine which type of relationship is primary. Check the radio box in the appropriate column of the table to indicate the primary type of relationship. Options are: <u>Network</u>, <u>Cooperator</u>, <u>Coordinator/Partnership</u>, <u>Coalition</u>, or <u>Collaborator</u>. If no relationship exists, select "none".</p> <ul style="list-style-type: none"> <li>• <u>Network</u>: getting together.</li> <li>• <u>Cooperator</u>: building trust and ownership.</li> <li>• <u>Coordinator/Partnership</u>: developing strategic plans.</li> <li>• <u>Coalition</u>: taking action.</li> <li>• <u>Collaborator</u>: establishing long-term commitment.</li> </ul>
<b>Description of Inter-Organizational Relationships</b>	<p>Summarize any plans to change, develop/enhance or expand inter-organizational relationships in upcoming years. Briefly describe with whom, how and why (1000 characters or less).</p> <p>If volunteers will be used, indicate the types of volunteers and their duties.</p>

## Program Plan and Results from Previous Year

The buttons included under the **Program Plan and Results from Previous Year** grouping include: **Budget Inputs**, **Program Priorities**, and **Delivery Sites and Partnerships**. The buttons under this heading serve a dual purpose. They provide an overview of what you intend to accomplish in upcoming years as well as report some of the results you achieved. These include fields that need to be reviewed and revised, as needed as well as fields that are updated each year.



*Plans are submitted in July which is in advance of the fiscal year. So, for example, the FY2018 Annual Update is due July 01, 2017, which is 3 months prior to the start of FY2018. This means that the results you report “from the previous year” will technically be for the year you are currently part of (in this example FY2017) and include projections for the remainder of the year.*

Figure 2 - Main Plan Page: Program Plan & Results from Previous Year

The screenshot displays a web interface for a plan page. It is divided into two main columns. The left column contains sections for 'General Information & Program Plan' and 'Program Plan & Results from Previous Year'. The right column contains 'Results from Previous Year' and 'Signature'. Each section has a button with a pencil icon and a status indicator. The 'Budget Inputs' button in the 'Program Plan & Results from Previous Year' section is highlighted with a blue border. Status indicators include '\* Required Data Missing' and '\* Section is empty'.

Section	Status
Contact Info	
Situation	* Required Data Missing
Other Inputs	* Required Data Missing
Budget Inputs	* Section is empty
Program Priorities	* Required Data Missing
Delivery Sites and Partnerships	* Required Data Missing
Environmental Settings	* Section is empty
Sectors of Influence	* Section is empty
Impacts	* Section is empty

## Budget Inputs

**Annual Update Years:** If you migrate your plan, this section is unlocked and is empty. You need to update this information every year.

### WebNEERS Instructions

1. From the main plan page, click on the **BUDGET INPUTS** button.
2. If applicable, click on the hyperlinks to preview your most recently approved **Federal Budget Sheet** or **Budget Justifications**.

#### Note:

Budgets and Budget Justifications are only visible if you have an approved budget submission in WebNEERS for that fiscal year\*\*. **When you initially submit your plan, your budget and justification may not be visible, but they will appear once approved.**

#### Note:

For instructions on budget submission, see "Budget and Justification Instructions", available <http://nifa.usda.gov/efnep-reporting-requirements>

3. Enter data on the amount received and the source of funds for each type of **Other Funds Received**.
4. Enter/revise the narrative **Description of Other Funds Received**.
5. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

---

### Description of Fields

---

Name of the Field	Description
<b>Federal Budget Sheet</b>	Nothing is required here. This is simply a way to preview the most recently approved budget sheet.
<b>Budget Justification</b>	Nothing is required here. This is simply a way to preview the most recently approved budget justification.
<b>Other Funds Received</b>	<p>Please enter other sources of funding received during the last Fiscal Year. Do not include funds captures in the Federal Budget Sheet.</p> <ul style="list-style-type: none"> <li>• <i><u>Other Federal</u>: includes funding from other Federal programs/agencies - not EFNEP. Examples are other Federal grants and contracts.</i></li> <li>• <i><u>Other Public</u>: includes non-Federal funds. Examples are State and Local government and university grants, contracts, and cash contributions.</i></li> <li>• <i><u>Other Private</u>: includes funds from the private sector. Examples are grants and contracts from foundations and non-profits, and cash contributions from businesses, individuals, and others in the private sector.</i></li> <li>• <i><u>In-Kind</u>: includes cash estimates of non-cash donations. Examples are food, transportation, and agency staff time.</i></li> </ul>
<b>Description of Other Funds Received</b>	Please discuss any plans/strategies to maintain or to increase other sources of funds in upcoming years.

### Program Priorities

**Annual Update Years:** *If you migrate your plan, this section is unlocked, but is pre-populated with the information from the previous year. You need to update the “actual” value in the data chart each year, and revise other sections as needed.*



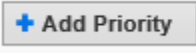

Note:

If you choose not to migrate the plan, you will be required to enter Program Priorities information from previous years of the 5-Year Plan to demonstrate progress over-time toward your identified program priorities.

---


### WebNEERS Instructions


---

1. From the main plan page, click on the **PROGRAM PRIORITIES** button.
2. Click “  ” to add a new priority or the “  ” icon open an existing priority.



Note:

If needed, use the “  ” icon to delete a priority. The delete icon is only visible if the priority is not part of a submitted plan; you cannot delete a priority if it has been submitted to the Federal Office.

3. Enter/revise the **Title** for the Priority.
4. Check the boxes to select/deselect the **Focus Areas**.
5. Click “  ” to add an additional focus area.
6. Enter/revise the narrative **Description**.
7. Use the dropdown to select/verify the **Measurement** type.
8. Select **Yes** for quantitative (numeric) measures.
  - a. Select/verify the **Unit of Measure**.
  - b. If it is a **5-Year Plan** year
    - i. Enter the **actual** numeric value for the baseline year.
    - ii. Enter the **target** values for all five upcoming years.
  - c. If it is an **Annual Update** year,
    - i. Enter the **actual** numeric value for the year that just ended.





Note:

Only enter numbers in the table.

9. Select No for qualitative (narrative) measures.
10. If it is a **5-Year Plan** year
  - a. Enter the **actual** descriptive value for the baseline year.



- b. Enter the **target** values for all five upcoming years.
11. If it is an **Annual Update** year,
    - a. Enter the **actual** descriptive value for the year that just ended.
  12. Enter **Comments**. (optional)
  13. Click "**Save**" to save the priority or the "**x**" at the top of the popup to cancel without saving.
  14. Repeat Steps 2-8 until you have added/updated all of your priorities.
  15. Check the checkbox in the "**Select**" column to include the priority in your submission.

Select	Options	Title
<input type="checkbox"/>	 	Example Program Priority



*You may add as many priorities as you want, but a maximum of five can be selected to send forward to the Federal Office. The Federal Office can only see the ones you select.*

16. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

## Description of Fields

Name of the Field	Description
<b>Program Priorities</b>	<p>Develop 3-5 SMART (specific, measurable, action-oriented, realistic, timely) program priorities to focus on over the next five years. 2-3 must directly measure Core Areas; others may focus on Secondary Areas. You may create more than 5 priorities, but a maximum of 5 may be submitted to the National Office. Make sure you check the boxes in the select column for those priorities you want to submit to the National Office. Only checked items will be visible at the Federal Level.</p> <p><u>Core areas:</u> Diet Quality/Physical Activity, Food Resource Management, Food Safety, Food Security.</p> <p><u>Secondary areas:</u> Family/Interpersonal Relationships, Management/Leadership, Sectors of Influence, Environmental Settings.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin-top: 10px;"> <p><b>Note:</b> <i>Secondary areas should not be the focus of your nutrition education program. They can support program goals, but should not be programmatic content areas.</i></p> </div>

## Delivery Sites and Community Partnerships

This section displays a list of all of your regions. If they entered Delivery Sites and Community Partnership (DSP) data you can include it in your submission. The list also includes any DSP data added by Institution level users. If you want to quickly review each region’s submission or if you need to add additional examples, return to the WebNEERS home screen and click on **Manage Delivery Sites/Partnerships** (see the [Manage Delivery Sites and Community Partnerships](#) section for instructions).

**Annual Update Years:** *If you migrate your plan, this section is unlocked and is empty. You need to update this information every year.*

## WebNEERS Instructions

From the main plan page, click on the **DELIVERY SITES AND PARTNERSHIPS** button.

1. Click the checkboxes to select/deselect the region(s) and/or the Institution Level record(s) you want to include in your **Delivery Sites/Locations and Community Partnerships (DSP)** submission.



**Note:**

You cannot add an Institution Level record within a plan, see the [Manage Delivery Sites and Community Partnerships](#) section below for instructions.

2. If needed, manually update the data in the chart.



**Note:**

If you manually update the data and then check or uncheck a checkbox, the manual changes are lost/overridden. If possible, it is better to contact your [Region Level](#) users and have them make updates/edits.

3. Enter/revise the narrative **Description** of your Delivery Sites/Locations and Community Partnerships.
4. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

---

### Description of Fields

---

Name of the Field	Description
<b>Delivery Sites/Locations and Community Partnerships (DSP) Chart</b>	Report the total number of delivery sites and the total number of community partnerships for each type of site/location listed below. If you wish to include the data submitted by your regions, select them from the list below. You can manually change the data, if needed, but you must click “save” to save the changes.
<b>Delivery Sites/Locations and Community Partnerships (DSP) Chart - continued</b>	If you later check/uncheck a region, your manual changes will be lost. To enter the data at the institution level, return to the home screen, click on Manage Delivery Sites and Partnerships and select add a new Institution level record. After saving, the Institution level record will appear in the list below.
<b>Description of DSPs</b>	Summarize any plans to expand, eliminate or relocate program delivery sites/locations or to change, develop/enhance or expand community partnerships in upcoming years. Briefly describe with whom, how, and why. (1000 characters or less)

## Results from Previous Year

The buttons included under the **Results from Previous Year** grouping include: **Environmental Settings**, **Sectors of Influence**, and **Impacts**. The buttons under this heading report results from the previous year. These need to be reviewed, revised, and updated each year.



*Plans are submitted in July which is in advance of the fiscal year. So, for example, the FY2018 Annual Update is due July 01, 2017, which is 3 months prior to the start of FY2018. This means that the results you report “from the previous year” will technically be for the year you are currently part of (in this example FY2017) and include projections for the remainder of the year.*

Figure 3 - Main Plan Page: Results from Previous Year

### **Environmental Settings**

**Annual Update Years:** *If you migrate your plan, this section is unlocked, but is pre-populated with the information from the previous year. You need to read through the items and update them each year.*

### **WebNEERS Instructions**

1. From the main plan page, click on the **ENVIRONMENTAL SETTINGS** button.

2. Click the checkboxes to select/deselect the **Short Term Indicators** you achieved over the past year.

### Environmental Settings

Check all areas in which you are working within an Environmental Setting (Organization/Community Level) to reduce challenges and increase opportunities for low-income individuals, families, and/or households. All outcomes should be helpful to the low-income audience and should support/further the work of low-income nutrition education, whether explicitly stated, or not.

---

#### Short Term Indicators

Organizations and Communities gain awareness, knowledge, and/or interest.

	Diet Quality	Physical Activity	Food Resource Management	Food Safety	Food Security
Hold discussions to identify challenges and opportunities for low-income populations that can be addressed from a community context.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commit to collaborate to address identified needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conduct needs assessment to determine the extent of concern and potential for resolution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form partnerships or coalitions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

---

#### Community Partnership Impacts

SEARCH:  SHOW 10 ENTRIES

Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site(s)
No data available in table								

SHOWING 0 TO 0 OF 0 ENTRIES



*The Community Partnership Impacts information can be added at the Institute or Region Level. Instructions for adding Community Partnership Impacts is addressed under Manage Community Partnership Impacts below.*

- a) Select the Short Term Community Partnership Impacts, from the available entries, to be included in your Annual Update.

#### Community Partnership Impacts

SEARCH:  SHOW 10 ENTRIES

Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site(s)
<input type="checkbox"/>		TEST: Healthy Schools in Midland	Maintenance	Environmental Settings	Long	Diet Quality, Food Security	Adult	1

SHOWING 1 TO 1 OF 1 ENTRIES

3. Click on the tab for **Diet Quality** tab in the **Medium Term Indicators** section.

**Medium Term Indicators**  
Organizations and Communities commit to change.

**DIET QUALITY** | PHYSICAL ACTIVITY | FOOD RESOURCE MANAGEMENT | FOOD SAFETY | FOOD SECURITY

- Partnership/Coalition adopts a written plan that contains specific objectives and action steps for diet quality.
- Facilitate the use of more nutritious foods at organization and community events and programs, such as food fairs and public meetings.
- Expand nutrition education opportunities through schools, community education programs, and electronic media.
- Implement consistent messaging and/or local branding.
- Increase nutrition education referrals across programs and agencies.
- Develop access to Community Supported Agriculture shares.
- Reduce disparities in policies that encourage healthy eating.
- Change policies, practices, and physical environment of an organization (e.g., a workplace, health care setting, school/daycare, faith organization, restaurant, or other public eating site) to support and improve the quality of foods offered.

[+ Add Other](#)

**Community Partnership Impacts**

SEARCH:  SHOW 10 ENTRIES

Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site(s)
No data available in table								

4. Click the checkboxes to select/deselect the items achieved over the past year.
5. Click “ [+ Add Other](#) ” to enter an example.
6. Repeat steps 3-5 for the **Physical Activity, Food Resource Management, Food Safety and Food Security.**
7. Select the Medium Term Community Partnership Impacts, from the available entries, to be included in your Annual Update.

**Community Partnership Impacts**

SEARCH:  SHOW 10 ENTRIES

Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site(s)
<input type="checkbox"/>	<a href="#">A</a>	TEST: Healthy Schools in Midland	Maintenance	Environmental Settings	Long	Diet Quality, Food Security	Adult	1

SHOWING 1 TO 1 OF 1 ENTRIES

8. Click on the tab for **Diet Quality** in the **Long Term Indicators** section.

*See screenshot on following page.*

*Screenshot – step 8 above.*

**Long Term Indicators**  
Organizations and Communities experience improved conditions. A culture exists for resolving concerns and taking action at a multi-organization/community level.

**DIET QUALITY** | PHYSICAL ACTIVITY | FOOD RESOURCE MANAGEMENT | FOOD SAFETY | FOOD SECURITY

- Nutrient-dense foods are offered in schools, restaurants, grocery stores, farmers markets, worksites, food pantries, and other locations.
- Transportation infrastructures support access to grocery stores, farmers markets, food assistance offices, etc.
- School and worksite wellness policies have been developed and are implemented to provide healthier foods at school and worksite events, in vending machines, etc.

[Add Other](#)

---

**Community Partnership Impacts**

SEARCH:  SHOW 10 ENTRIES

Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site(s)
No data available in table								

SHOWING 0 TO 0 OF 0 ENTRIES

[Previous](#) [Next](#)

9. Click the checkboxes to select/deselect the items achieved over the past year.
10. Click “ [Add Other](#) ” to enter an example.
11. Repeat steps 7-9 for the **Physical Activity, Food Resource Management, Food Safety and Food Security.**
12. Select the Long Term Community Partnership Impacts, from the available entries, to be included in your Annual Update.

**Community Partnership Impacts**

SEARCH:  SHOW 10 ENTRIES

Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site(s)
<input type="checkbox"/>	<a href="#">Add</a> <a href="#">Edit</a>	TEST: Healthy Schools in Midland	Maintenance	Environmental Settings	Long	Diet Quality, Food Security	Adult	1

SHOWING 1 TO 1 OF 1 ENTRIES



13. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

---

## Description of Fields

---

Name of the Field	Description
<b>Environmental Settings</b>	<p>Check all areas in which you are working within an Environmental Setting (Organization/Community Level) to reduce challenges and increase opportunities for low-income individuals, families, and/or households.</p> <p><i>All outcomes should be helpful to the low-income audience and should support/further the work of low-income nutrition education, whether explicitly stated, or not.</i></p>

Name of the Field	Description
Short Term Indicators*	Organizations and Communities gain awareness, knowledge, and/or interest.
Medium Term Indicators*	Organizations and Communities commit to change.
Long Term Indicators*	Organizations and Communities experience improved conditions. A culture exists for resolving concerns and taking action at a multi-organization / community level.
Community Partnership Impacts	<p>Community partnership impacts are related to work at the community level (i.e., work with non-profits, universities, private organizations or industry groups). It takes more than one program or partner to produce community level success. Community partnership impacts highlight the work of your program as one of multiple groups that drove a community action. Choose community health change efforts that have potential or demonstrated benefit in EFNEP core areas or that improve the lives of limited resource audiences. Consider tying community partnership impacts to program priorities. This can be done by clicking the wrench icon to open the impact and checking the box to select the related program priority in the Program Priorities Section. Make sure you check the boxes in the select column to include impacts in your submission. Only checked items will be visible at the Federal Level.</p> <p> <b>Note:</b> <i>This option is only available within the program plan. To add a community partnership impact, return to the home screen and go to the “Manage Community Partnership Impacts” section.</i></p> <p> <b>Note:</b> <i>If your community partnership impact is selected for use at the Federal level, the text may be edited to fit the space.</i></p>

*\*For complete list of indicators, see [Appendix 1 located at the end of this section.](#)*

## Sectors of Influence

**Annual Update Years:** *If you migrate your plan, this section is unlocked, but is pre-populated with the information from the previous year. You need to read through the items and update them each year.*

---

### WebNEERS Instructions

1. From the main plan page, click on the **SECTORS OF INFLUENCE** button.



2. Enter/revise the data in the **Organizational Involvement** chart. *Screenshot on following page.*

### Sectors of Influence

Check all areas in which you are working within and across sectors of influence (government, media, industry, agriculture, health care, and other systems) to reduce challenges and increase opportunities for low-income individuals, families, and/or households. All outcomes should be helpful to the low-income audience and should support/further the work of nutrition education programs, whether explicitly stated, or not. Our role is to appropriately inform and influence the sectors, specifically.

- Keeping in mind the low-income population for decisions made;
- Considering what is reasonable and practical in decisions made;
- Thinking through how to incorporate/coordinate with what is done through low-income nutrition education efforts; and
- Making our nutrition education programs a part of the solution (e.g. increasing visibility and access to our programs as a "structural" component of solutions and actions taken).

Note - We are not advocating for any specific policy or taking any specific position. The examples below are only examples of what you could be doing. Different actions/approaches and solutions may be appropriate depending on the situation.

### Organizational Involvement

For the examples you select, indicate the number of other organizations involved. Indicate all that apply.

Type of Organizations	# Involved
Universities	2 <input style="width: 50px;" type="text"/>
Government Agencies	0 <input style="width: 50px;" type="text"/>
Business/Industry	0 <input style="width: 50px;" type="text"/>
Non-Profit Agencies	0 <input style="width: 50px;" type="text"/>
Other	0 <input style="width: 50px;" type="text"/>

3. Click the checkboxes to select/deselect the **Short Term Indicators** you achieved over the past year.

### Short Term Indicators

Sector representatives identify and define social structure and policy relevant issues.

	Diet Quality	Physical Activity	Food Resource Management	Food Safety	Food Security
Participate in discussions with sector representatives regarding the potential impact of practices, structures, regulations, and policies on low-income audiences.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convene taskforces, expert committees, or advisory groups to determine the extent of concern and potential for resolution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commit to collaborate and communicate within and across sectors to address identified needs and determine respective roles of responsibility.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Community Partnership Impacts

SEARCH:  SHOW 10 ▾ ENTRIES

Select ▾	Options	Title	Stage ▾	Term ▾	Type ▾	Focus ▾	Participant Type ▾	Site(s) ▾
No data available in table								

SHOWING 0 TO 0 OF 0 ENTRIES



**Note:**

*The Community Partnership Impacts information can be added at the Institute or Region Level. Instructions for adding Community Partnership Impacts is addressed under Manage Community Partnership Impacts below.*

- a) Select the Short Term Community Partnership Impacts, from the available entries, to be included in your Annual Report.

Community Partnership Impacts

SEARCH:

SHOW 10 ENTRIES

Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site (s)
<input type="checkbox"/>		TEST: Healthy Schools in Midland	Maintenance	Environmental Settings	Long	Diet Quality, Food Security	Adult	1

SHOWING 1 TO 1 OF 1 ENTRIES

4. Click on the tab for **Diet Quality** in the **Medium Term Indicators** section.



5. Click the checkboxes to select/deselect the items you achieved over the past year.
6. Click “**Add Other**” to enter your own example.
7. Repeat steps 4-6 for the **Physical Activity, Food Resource Management, Food Safety** and **Food Security**.
8. Select the Medium Term Community Partnership Impacts, from the available entries, to be included in your Annual Report

Community Partnership Impacts

SEARCH:

SHOW 10 ENTRIES

Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site (s)
<input type="checkbox"/>		TEST: Healthy Schools in Midland	Maintenance	Environmental Settings	Long	Diet Quality, Food Security	Adult	1

SHOWING 1 TO 1 OF 1 ENTRIES

9. Click on the tab for **Diet Quality** in the **Long Term Indicators** section.



10. Click the checkboxes to select/deselect the items you achieved over the past year.
11. Click “**Add Other**” to enter your own example.
12. Repeat steps 8-10 for the **Physical Activity, Food Resource Management, Food Safety** and **Food Security**.
13. Select the Long Term Community Partnership Impacts, from the available entries, to be included in your Annual Report

Community Partnership Impacts

SEARCH:


SHOW 10 ENTRIES



Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site (s)
<input type="checkbox"/>		TEST: Healthy Schools in Midland	Maintenance	Environmental Settings	Long	Diet Quality, Food Security	Adult	1

SHOWING 1 TO 1 OF 1 ENTRIES

14. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

## Description of Fields

Name of the Field	Description
<b>Sectors of Influence</b>	<p>Check all areas in which you are working within and across sectors of influence (government, media, industry, agriculture, health care, and other systems) to reduce challenges and increase opportunities for low-income individuals, families, and/or households.</p> <p><i>All outcomes should be helpful to the low-income audience and should support/further the work of low-income nutrition education, whether explicitly stated, or not.</i></p> <p>EFNEP's role is to appropriately inform and influence the sectors, specifically:</p> <ul style="list-style-type: none"> <li>• Keeping in mind the low-income population for decisions made;</li> <li>• Considering what is reasonable and practical in decisions made;</li> <li>• Thinking through how to incorporate/coordinate with what is done through low-income nutrition education efforts; and</li> <li>• Making our nutrition education programs a part of the solution (e.g. increasing visibility and access to our programs as a "structural" component of solutions and actions taken).</li> </ul> <p> <b>Note:</b> <i>EFNEP does not advocate for any specific policy or taking any specific position. Different actions/approaches and solutions may be appropriate depending on the situation.</i></p>
<b>Organizational Involvement</b>	<p>For the examples you select, indicate the number of other organizations involved. Indicate all that apply.</p>
<b>Short Term Indicators*</b>	<p>Sector representatives identify and define social structure and policy relevant issues.</p>
<b>Medium Term Indicators*</b>	<p>Sector representatives influence action.</p>
<b>Long Term Indicators*</b>	<p>Conditions improve within and across states.</p>

Name of the Field	Description
<b>Community Partnership Impacts</b>	<p>Community partnership impacts are related to work at the community level (i.e., work with non-profits, universities, private organizations or industry groups). It takes more than one program or partner to produce community level success. Community partnership impacts highlight the work of your program as one of multiple groups that drove a community action. Choose community health change efforts that have potential or demonstrated benefit in EFNEP core areas or that improve the lives of limited resource audiences. Consider tying community partnership impacts to program priorities. This can be done by clicking the wrench icon to open the impact and checking the box to select the related program priority in the Program Priorities Section. Make sure you check the boxes in the select column to include impacts in your submission. Only checked items will be visible at the Federal Level.</p> <p> <b>Note:</b> <i>This option is only available within the program plan. To add a community partnership impact, return to the home screen and go to the “Manage Community Partnership Impacts” section.</i></p> <p> <b>Note:</b> <i>If your community partnership impact is selected for use at the Federal level, the text may be edited to fit the space.</i></p>

**\*For complete list of indicators, see [Appendix 2 located at the end of this section](#)**

## Impacts




This section displays all program impacts and qualitative examples entered by Region Level and Institution Level users. If you want to quickly review each region's submission or if you need to add additional ones, return to the WebNEERS home screen and click **Manage Program Impacts** (see the [Manage Program Impacts](#) section for instructions). You cannot add impacts or examples from within the plan.

**Annual Update Years:** *If you migrate your plan, this section is unlocked and is empty. You need to update this information every year.*

---

## WebNEERS Instructions

---

1. From the main plan page, click on the **IMPACTS** button.
2. In the **Program Impacts, Environmental Settings Qualitative Examples** and the **Sectors of Influence Qualitative Examples** sections:
  - Use the “” icon to preview/edit the impact or the “” icon to preview the impact or example. If the “” icon is visible and you need to make edits, uncheck the checkbox in the “**Select**” column, click **Save**, and click the **IMPACTS** button to reopen the section.




### Note:

*If no impacts or examples exist for one of the sections, the table will be empty.*




### Note:

*If you edit a regional impact at the Institution level, those edits are also visible to the Regional Level user.*

- Use the “” icon to hide the impact or example, if needed.



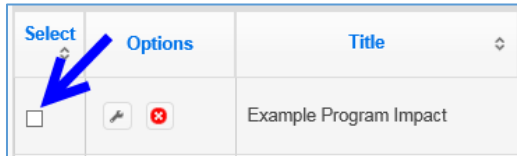
### Note:



*If you hide an example by mistake, return to the WebNEERS home screen, click on **Manage Program Impacts**, click on the **View Hidden Program Impacts** button, and click the “” icon to unhide it.*



*You will see either the edit and delete icons or the preview icon. The edit and delete icons are only visible if the impact is not associated with a plan submitted to the Federal Office. If the impact was submitted, only the preview icon will be visible.*

3. If the example in the **Program Impacts** section and is related to a **Program Priority**:
  - a. Scroll to the **Program Priorities** section.
  - b. Check the box to select the priority the impact relates to.
  - c. Click **Save** to save changes or click the “x” on the top right of the pop-up to close without saving the changes.
4. Check the checkbox in the “**Select**” column to include up to three (3) **Program Impacts**.






Select	Options	Title
<input type="checkbox"/>	 	Example Program Impact

5. Ensure that the **Community Partnership Impacts** selected in **Environmental Settings** section and the **Sectors of Influence** section are displayed below **Program Impacts**.
6. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

---

### ***Description of Fields***

---

Name of the Field	Description
<b>Program Impacts</b>	<p>Submit up to 3 qualitative (narrative/descriptive) examples highlighting the impact of your program. Program impacts are related to work at the individual level (i.e., work with participants or collaborators). Choose ones which: show behavior change, provide evidence of improved quality of life, and best represent the work of your program. Consider tying qualitative program impacts to program priorities. This can be done by clicking the wrench icon to open the impact and checking the box to select the related program priority in the Program Priorities Section. Make sure you check the boxes in the select column to include impacts in your submission. Only checked items will be visible at the Federal Level.</p> <p> <b>Note:</b> <i>This option is only available within the program plan. To add a program impact, return to the home screen and go to the “Manage Program Impacts” section.</i></p> <p> <b>Note:</b> <i>If your program impact is selected for use at the Federal level, the text may be edited to fit the space.</i></p>
<b>Community Partnership Impacts</b>	<p>If you selected any <b>Community Partnership Impacts</b> in the Environmental Settings section or the Sectors of Influence section, verify that they appear here. To add a <b>Community Partnership Impact</b>, return to the home screen and go to the “Manage Community Partnership Impacts” section. Make sure you check the box in the select column in the Environmental Settings or Sectors of Influence section to include the example in your submission. Only checked items will be visible at the Federal Level.</p> <p> <b>Note:</b> <i>If your qualitative example is selected for use at the Federal level, the text may be edited to fit the space.</i></p>

## Signature

The section included under the **Signature** grouping is: **Request Director Signature**. This is used to secure your Extension Director or Administrator’s signature, a requirement for 5-Year Plan years. The signature only needs updating Annual Update years if required by your university or if specifically requested by the Federal Office. You will only be able to request your Director’s/Administrator’s signature if you have completed all required sections of the plan.



And, you should only send your plan to your Director/Administrator after your plan is finalized because any changes you make to your plan after it is approved will have to be reapproved (i.e., they will negate your approval status). After your Director/Administrator approves your plan, the submit button will appear.



*Your Director/Administrator does not need access to WebNEERS to review and approve the plan. He/she will receive an email from “EFNEP Admin” with a link to an html (onscreen view) of the plan. At the bottom there is an option to ‘Approve’ or to send it back as ‘Needs Revision’.*

**Figure 4 - Main Plan Page: Signature**

The screenshot displays a web interface for a plan page, organized into two columns. The left column contains sections: 'General Information & Program Plan' with sub-sections 'Contact Info', 'Situation' (marked '\* Required Data Missing'), and 'Other Inputs' (marked '\* Required Data Missing'); 'Program Plan & Results from Previous Year' with sub-sections 'Budget Inputs' (marked '\* Section is empty'), 'Program Priorities' (marked '\* Required Data Missing'), and 'Delivery Sites and Partnerships' (marked '\* Required Data Missing'). The right column contains 'Results from Previous Year' with sub-sections 'Environmental Settings' (marked '\* Section is empty'), 'Sectors of Influence' (marked '\* Section is empty'), and 'Impacts' (marked '\* Section is empty'). A 'Signature' section is highlighted with a blue border and contains a 'Request Director Signature' button.



*If there is a new Director/Administrator, the incoming Director/Administrator has the option to let the previous Administrator’s signature serve as approval from the Office for the remainder of the 5-year plan period or the incoming Director/Administrator may choose to review the annual update themselves their first year for the 5-year plan period.*

## Request Director Signature

This Request Director Signature option is only available after you complete all required sections of your plan. A signature can be requested if “**section is empty**” messages are displayed; these sections are optional.

**Annual Update Years:** *If you migrate your plan, this section is locked and is pre-populated with the signature from the previous year. Only unlock it if you need to get a new signature per your university requirements or per a special request from the Federal Office, otherwise it is pre-approved.*

### Note:

*If you choose not to migrate the plan, you will be required to secure the Directors Signature before you will be able to submit your plan for federal review.*

---

### WebNEERS Instructions

---

1. From the main plan page, click on the **REQUEST DIRECTOR SIGNATURE** button.
2. Enter your Extension Director or Administrator’s email address. Make sure it is accurate.
3. Click **Send to Director for Approval** to send an email to your director requesting his/her approval of the plan or **Cancel** to return to the main plan page without sending.

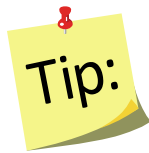
### Tip:

It is a good idea to notify your Director that he/she should watch for a message from “EFNEP Admin” which will provide the link he/she needs to approve your plan. Messages are sent instantly and should arrive within minutes, but occasionally these messages get filtered as junk mail so an Administrator may need to check there as well. To assist your Director, you may also want to print off or provide him/her with the [Director Instructions](#).

4. If you need to resend the email or request a signature from someone different, click the “**Cancel Request for Signature**” button and then repeat steps 1-3.
5. If your plan comes back as “Needs Revision”, contact your Director to see what changes you need to make, update your plan, click the “**Resubmit with Changes**” and repeat steps 1-3 to resend to your Extension Director or Administrator.

### Note:

*As soon as your Director clicks “approve” your plan will be submitted to the Federal Office. This happens automatically.*



## Tip:

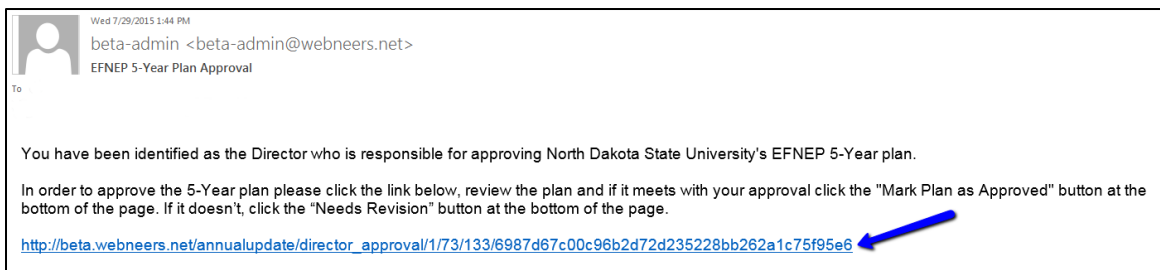
You may want to log into your plan periodically to make sure your Director approved it. If he/she has not, you might want to follow-up by phone or email.

---

### Director Instructions

---

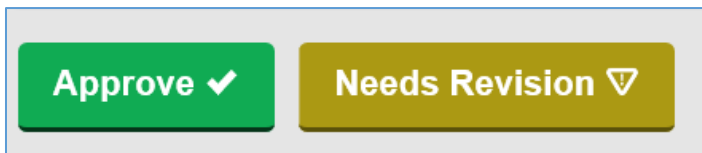
1. Watch for an email from EFNEP Admin ([EFNEP-admin@webneers.net](mailto:EFNEP-admin@webneers.net)).
2. Click on the link within the email message to access the plan.



## Note:

*If the request for signature was cancelled by the plan preparer, the link will no longer work; you must request a new one.*

3. Review the plan.
4. If it is acceptable click **"Approve"** at the bottom of the plan; if not, click **"Needs Revision."**



## Note:

*This director approval feature was designed for people without WebNEERS accounts. If the Director has an account and is logged in when he/she clicks **"Approve"** or **"Needs Revision"** a red error message may flash and it may return him/her to a page that says "page cannot be found". This does not affect the approval process and can be disregarded.*

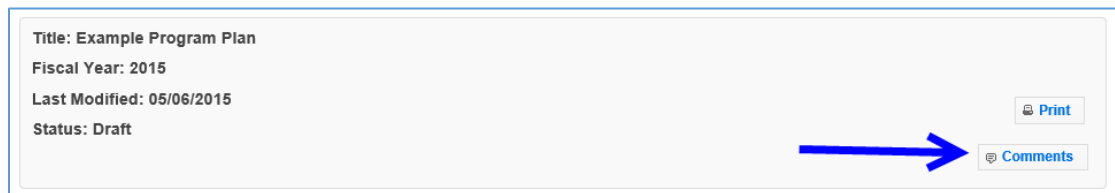
## Comments (optional)

The **Comments** feature (button on top right of main plan page) allows two-way communication between the Institution Level submitter and the Federal Level reviewer. You can use this to send any additional comments to the Federal reviewer and they will use this to send you feedback on your plan after they review it.

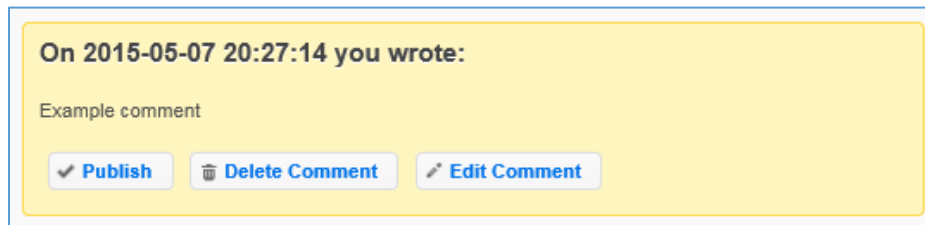
**Annual Update Years:** *If you migrate your plan, all institution and federal comments from previous years will be visible.*

### WebNEERS Instructions

1. From the main plan page, click on the **Comments** button on the top right of the screen.



2. Enter your comment in the **Add Comment** field.
3. Click the **Add Comment** button to add the comment. After doing so, it will look like this:



4. Click **Publish** to make the comment visible to the Federal level upon submission.
5. Click **Delete Comment** to delete the comment.
6. Click **Edit Comment** to edit the comment.

### Note:

*Only published comments are visible at the Federal level. If you publish a comment by mistake, you can click **Unpublish**. This will save the comment, but make it invisible to the Federal level upon submission.*

7. Click the "x" on the top right of the pop-up to close the **Comments** section/return to your plan.

## Plan Submission

After you complete your Annual Update/5-Year Plan, you must submit it to the Federal Office for approval.

### Understand ‘Submission Status’

Your plan’s status will always be one of the following. You can find the status by clicking “**Manage Annual Update/5-Year Plan**” from the *WebNEERS Home Page* and viewing the “**Status**” column or by opening your plan and looking at the [top section of the main plan page](#).

1. **Draft:** This status indicates that you have not submitted your plan. It is in draft form.
2. **Pending:** This status indicates that you have submitted your plan, but the Federal Office has not begun its review. While your submission is “Pending” review you can still make edits to your plan or cancel your submission.
3. **Under Review:** This status indicates that the Federal Office has begun reviewing your plan. While your submission is “Under Review” you cannot cancel your submission or make edits. If you unlock a section, make edits, and click save, the system will generate a cloned version of your plan inclusive of your changes.
4. **Needs Revision:** This status indicates that the Federal Office has reviewed your plan and discovered one or more issues. You will need to address the issues and resubmit your plan (see “[Revise and Resubmit Annual Update/5-Year Plan](#)” for instructions).  
*See additional notes below.*



Tip:

*Sections that are locked are approved; sections that are unlocked need revision. Notes from the reviewer(s) about your plan and what needs to be revised can be found in the “[Comments](#)” section.*

5. **Approved:** This status indicates that the Federal Office has reviewed your plan and has approved it. No further action is needed.




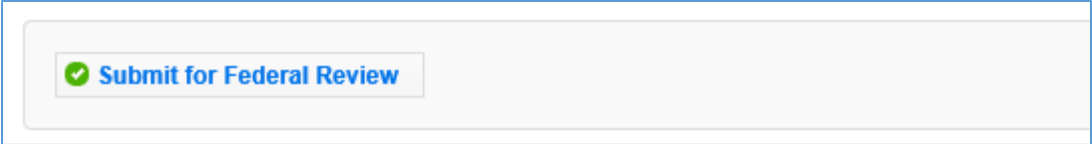
Tip:

*When the plan is approved, all sections are locked. Notes from the reviewer(s) about your plan can be found in the “[Comments](#)” section.*

## Submit Annual Update/5-Year Plan for Federal Review

### WebNEERS Instructions

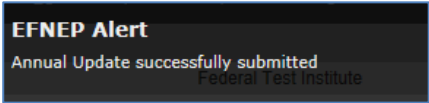
1. Select “**Manage Annual Update/5-Year Plan**” from the *WebNEERS Home Page*.
2. Click the “” icon to open your plan.
3. Click **Submit for Federal Review** at the bottom of the plan.



The submission button is only be visible if you already have a Director Signature and you are working on an Annual Update or making edits to a plan that was sent back “Needs Revision”. If a Director Signature is required, the user will not have access to the submit button and should not have to click the submit button to submit for Federal Review; the plan is submitted automatically when the Director clicks the “approve” option (see [Request Director Signature](#) section for more information).

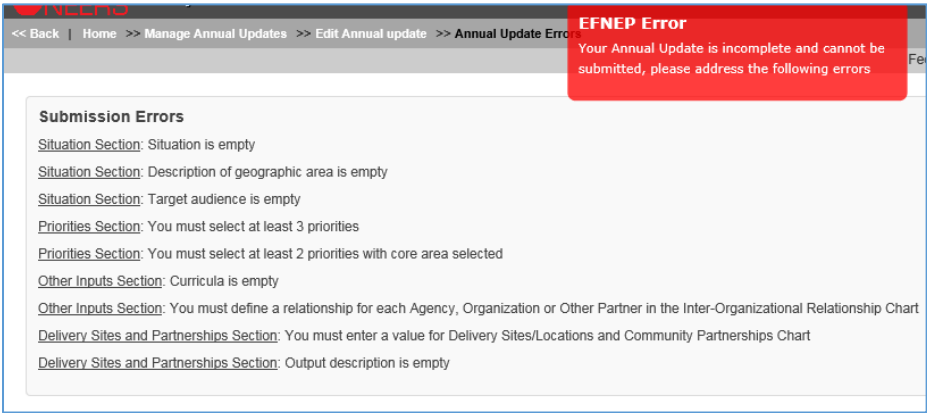
4. Click **OK** to submit the plan or **Cancel** to cancel the submission.

If your submission was successful, you will receive an EFNEP Alert that your submission was successful and you will be returned to the **Manage Annual Update/5-Year Plan** screen.

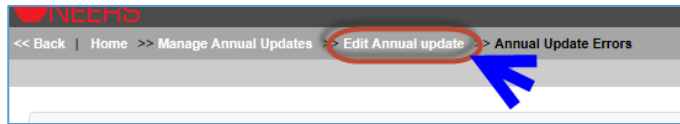


Sometimes the alert message is quick, if you don't see it, move on to step 5. If you your status is still “**Draft**”, return to step 2 and try again!



If your submission failed, you will get a red EFNEP Error alert message in the top right corner of your screen and a list of **Submission Errors**. The submission errors represent required fields (any outlined in red within your plan) that are incomplete. These must be fixed before you can successfully submit your plan.





- To fix submission errors, review and make note of items that need to be fixed.
- Click **“Edit Annual update”** on the breadcrumb trail to return to your plan.




- Click on the section(s) with the error(s) and make corrections.
- Scroll to the bottom and click **“Submit for Federal Review”**. If the submission fails again, complete these steps again.
- After you submit, confirm your **Status** is **“Pending”** on the **Manage Annual Update/5-Year Plan** screen.

Manage	Plan Name	Fiscal Year	Status
 	Example Program Plan	2015	Pending

- Use the  icon to preview the plan you submitted.
- Use the  icon to duplicate your plan.

### Note:

The  icon will only be visible if the plan has not been submitted. If you need to delete a plan that was submitted, you will need to cancel the submission first (see below for instructions).

### Tip:

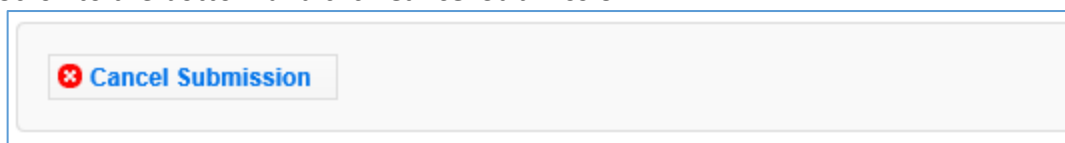
If you notice a mistake before the Federal Office begins its review, you can make edits within the plan and save them. All saved changes to a **“Pending”** plan are automatically visible to the Federal Office after you save.

## Cancel Annual Update/5-Year Plan Submission

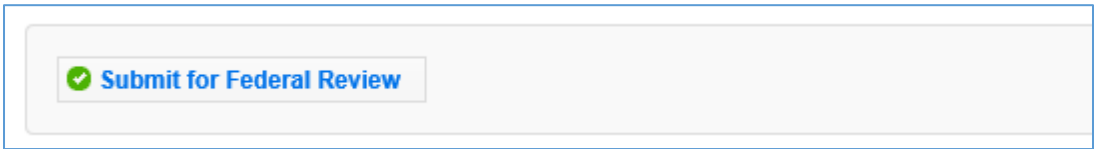
If your Annual Update/5-Year Plan has a status of **“Pending”**, you can cancel the submission.

### WebNEERS Instructions

- From the **Manage Annual Update/5-Year Plan** screen, click the  icon.
- Scroll to the bottom and click **Cancel Submission**.



3. Watch for an alert message at the top right confirming that it was successful.
4. Make edits to your plan as needed.
5. When you are done, click **Submit for Federal Review** to resubmit your plan.




The **Cancel Submission** button will only be visible if the plan is still **“Pending”**; you cannot cancel a submission if the status is **“Under Review”**, **“Needs Revision”** or **“Approved”**.




## Revise and Resubmit Annual Update/5-Year Plan


### Plan Marked **“Needs Revision”**

If your Annual Update/5-Year Plan submission is marked as **“Needs Revision”**, you need to determine the issue(s) with your plan, make revisions, and resubmit.

### WebNEERS Instructions

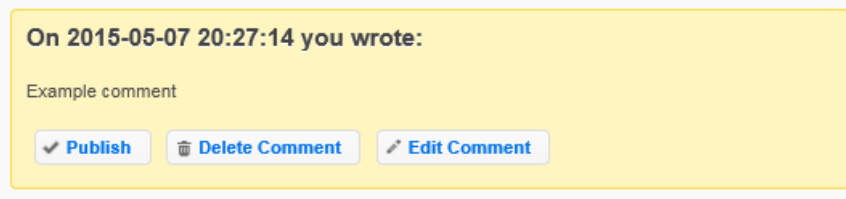
1. From the **Manage Annual Update/5-Year Plan** screen, click the “” icon to open your plan.
2. Note which sections are locked and which aren’t. Example:

	<p><u>Locked Sections</u> are approved. No further action is needed.</p> <p><b>Tip:</b> If you need to make revisions, you can unlock the section (see <a href="#">Plan Marked “Approved”</a> section for instructions), but if you do so, the section will have to undergo another review by the Federal Office for approval.</p>
	<p><u>Unlocked Sections</u> need revision. To see why, click the “ <b>Comments</b>” button on the top right of the main plan page and review the Federal Comments.</p>

3. On sections that are unlocked, make revisions based on the Federal Comments.
  - a. If needed, click the “ **Comments**” button to add a response or additional information.



- b. Enter a comment explaining the change and click the **Add Comment** button to add the comment. After doing so, it will look like this:

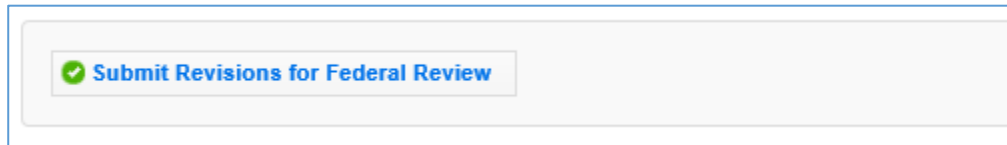


4. Click **Publish** to make the comment visible to the Federal level upon submission.
5. Click **Delete Comment** to delete the comment.
6. Click **Edit Comment** to edit the comment.



*Only published comments are visible at the Federal level. If you publish a comment by mistake, you can click **Unpublish**. This will keep the comment, but make it invisible to the Federal level upon submission.*

7. Click the “x” on the top right of the pop-up to close the **Comments** section/return to your plan.
8. Make sure you click **Publish** to make your comment visible to the Federal reviewer.
9. Scroll to the bottom and click **Submit Revisions for Federal Review** to resubmit your revisions.



10. Click **OK** to resubmit the plan or **Cancel** to cancel the resubmission. If your resubmission fails, follow the instructions in the [Submit Annual Update/5-Year Plan for Federal Review](#) section to make corrections and resubmit.

### ***Plan Marked “Approved”***

If your Annual Update/5-Year Plan submission is marked as “**Approved**”, but you need to make a change, you have to unlock the section you need to modify, make revisions, and resubmit.

*See additional notes below.*



**Note:**

Modifying an “**Approved**” plan will create a clone of the plan; you cannot edit a plan that has been approved by the Federal Office. You are essentially creating a new one.



---

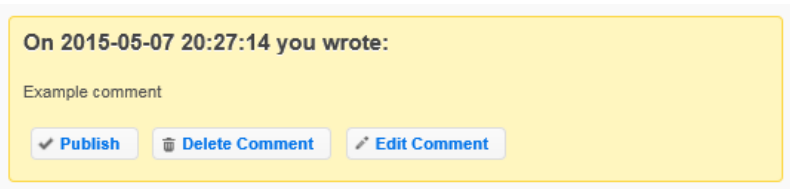
**WebNEERS Instructions**

---

1. From the **Manage Annual Update/5-Year Plan** screen, click the “” icon to open your “**Approved**” plan.



2. Open the section you need to modify and click the “” button at the top of the screen.
3. Click **OK** on the warning message to confirm that you want to unlock/edit the section.
4. Click **Cancel** to cancel the action and keep the section locked.
5. Make any edits you need to make.
6. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.
7. Click **OK** to confirm the changes and to create a cloned copy of your plan. The cloned plan will have the same file name, but “ - cloned on xx/xx/xxxx” is appended to it.
8. Make any additional edits.
9. Click on the “ **Comments**” button on the top right.
10. Enter a comment explaining the change in the **Add Comment** field.
11. Click the “**Add Comment**” button to add the comment. After doing so, it will look like this:



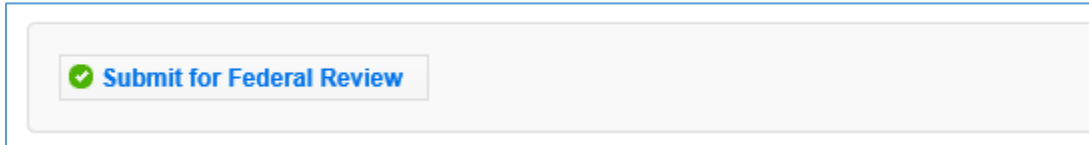
12. Click **Publish** to make the comment visible to the Federal level upon submission.
13. Click **Delete Comment** to delete the comment.
14. Click **Edit Comment** to edit the comment.



**Note:**

Only published comments are visible at the Federal level. If you publish a comment by mistake, you can click **Unpublish**. This will keep the comment, but make it invisible to the Federal level upon submission.

15. Click the “x” on the top right of the pop-up to close the **Comments** section/return to your plan.
16. Scroll to the bottom and click “**Submit for Federal Review.**”
17. Click “**OK**” to submit the plan or “**Cancel**” to cancel the submission.



## Create New Plan

### WebNEERS Instructions

1. Log in as an Institution Level user.
2. Select “**Manage Annual Update/5-Year Plan**” from the **WebNEERS Home Page**.
3. Click **Add New Plan** to create a new Annual Update/5-Year Plan file.
4. Enter a **Plan Name** (example “*Clemson University Annual Update*”).
5. Enter the appropriate **Fiscal Year** – format = YYYY.
6. Enter the **First Name** and **Last Name** of the Program Contact – typically this is the Program Coordinator.
7. Enter the **Phone Number**, **Fax Number**, **Email Address** and **Program Website** for the person listed as the Program Contact (optional).
8. Enter the **First Name** and **Last Name** of the Extension Director or Extension Administrator.
9. Click Save to create the plan or Cancel to return to the Manage Annual Update/5-Year Plan screen without saving.






*You can create multiple plans, if needed, but you should only submit one to the Federal Office.*

## Clone an Annual Update/5-Year Plan

The clone option allows users to duplicate or make a copy of a plan without having to retype all the information. It maintains the lock/unlocked status of each section. This option will not move the plan into the new reporting year. To do so, use the [Migration Steps](#) above to migrate your plan.



### WebNEERS Instructions

1. Log in as an Institution Level user.
2. Select “**Manage Annual Update/5-Year Plan**” from the **WebNEERS Home Page**.

3. Locate the plan you want to make a copy of and click the “” icon.
4. Click “Ok” to create a duplicate copy of your plan or “Cancel” if you intended to migrate your plan, not duplicate it. The duplicate plan will be listed on your **Manage Annual Update/5-Year Plan** screen and will have “- Cloned on DD/MM/YYYY” appended to the plan name.
5. Use the “” icon to edit your cloned plan or the “” icon to preview your cloned plan.



*You will see either the edit or the preview icon. The edit icon is only visible if the cloned plan has not been submitted to the Federal Office. If the cloned plan has been submitted, the preview icon will be visible.*

6. Use the “” icon to duplicate your cloned plan.
7. Use the “” icon to delete your cloned plan.






*The delete icon will only be visible if the plan has not been submitted; you cannot delete a plan if it has been submitted to the Federal Office.*

## **Manage Delivery Sites and Community Partnerships**

The **Manage Delivery Sites and Community Partnerships** screen includes all Regional Level and Institution Level Delivery Site and Community Partnership records. There is only one record per region, but the Institution Level can add as many records as needed.


## **WebNEERS Instructions**

1. Log in as an Institution Level user.
2. Select “**Manage Delivery Sites and Partnerships**” from the **WebNEERS Home Page**.
3. Click **Add Institute Level Delivery Site and Partnership Record** to create an Institution Level record.
4. Enter the required data (see [Region Level Instructions](#) for details).
5. Click “**Save**” to save the record or “**Cancel**” to cancel without saving.
6. Use the “” icon to delete your record.
7. Use the “” icon to edit your record or the “” icon to preview the record.



Note:

*You will see either the edit or the preview icon. The edit icon will only be visible if the record is not associated with a plan that was submitted to the Federal Office. If the record has been submitted, the preview icon will be visible.*

8. For Region Level records, use the “” icon to preview the record.
9. If the data is incorrect, contact the region and have them log into the system and make updates. As soon as they save their changes, they will be visible to you!  
*See additional notes below.*



Note:

*Institution Level users cannot edit Region Level records. Within the Annual Update/5-Year Plan the data can be manipulated, but it will not change the original record. If you want the actual record to be accurate, the Region Level user must make the changes in their system.*

### Edit Program Delivery Sites and Partnerships – Region Level

The Edit Program Sites and Partnerships reports on the locations at which programming occurs and the partnerships which are formed in the communities.



Tip:

There is only one Delivery Sites and Partnerships screen per region. This means the data for all Region level users is captured in the same place. It is advised that one person per region be responsible for aggregating and entering this data so that data is accurate and edits are not inadvertently overridden.

1. Select **Edit Delivery Sites and Partnerships** from the **WebNEERS Home page**.
2. In the first column, enter the region’s total **# of Different Program Delivery Sites/Locations**.



Note:

*It is important to record each site only one time under the “# of Different Program Delivery Site/Locations”. This section does not record the number of different activities provided at sites.*

3. In the second column, enter the total **# of Community Partnerships** for the region.



Note:

Community Partnerships are local or community-based organizations the university or institution is working with to meet programmatic goals. The relationship should be mutually beneficial and may be formal or informal in nature. They can include networking, cooperating, coordinating, partnerships, forming coalitions or collaborating.

- 4. Click "Add Other" to add an additional location to the chart.



Note:

Specific details about items added under "Other" are not be visible at the Institute level, but will be aggregated with any other "Other" items added by other regions.

See screenshot below.

Figure 5: Delivery Sites and Community Partnerships Chart

**Delivery Sites / Locations and Community Partnerships:**

For applicable types of delivery sites/locations below, indicate the number of sites reached and the number of community partnerships

Types of Sites/Locations	# of Different Program Delivery Sites/Locations	# of Community Partnerships [?]
Adult Education & Training Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Adult Recreation Centers	<input type="text" value="0"/>	<input type="text" value="0"/>
Churches	<input type="text" value="0"/>	<input type="text" value="0"/>
Community Centers	<input type="text" value="0"/>	<input type="text" value="0"/>
Emergency Food Assistance Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Extension Offices	<input type="text" value="0"/>	<input type="text" value="0"/>
Farmers Markets	<input type="text" value="0"/>	<input type="text" value="0"/>
Food Stores	<input type="text" value="0"/>	<input type="text" value="0"/>
Head Start Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Health Care Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Libraries	<input type="text" value="0"/>	<input type="text" value="0"/>
Other Youth Education Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Public Housing	<input type="text" value="0"/>	<input type="text" value="0"/>
Schools	<input type="text" value="0"/>	<input type="text" value="0"/>
Shelters	<input type="text" value="0"/>	<input type="text" value="0"/>
SNAP Offices	<input type="text" value="0"/>	<input type="text" value="0"/>
WIC Program Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Worksites	<input type="text" value="0"/>	<input type="text" value="0"/>



[+ Add Other](#)

## Manage Program Impacts

The **Manage Program Impacts** screen includes all Regional Level and Institution Level Program impacts. Regional impacts are only visible at the Institution Level if the “Submit for Institution Use” box is checked at the Regional Level (note, this box is checked by default). The **SEARCH** box can be used to quickly find examples by their title, type, submitter, keywords, people, focus, or date. Institution Level users can edit Regional impacts, if needed. Those changes will be visible to the Regional Level user.


SEARCH:

## WebNEERS Instructions


1. Log in as an Institution Level user.
2. Select “**Manage Program Impacts**” from the **WebNEERS Home Page**.
3. Click **Add Program Impact** to create an Institution Level impact.
4. Select **Program Impact** (individual level) from the dropdown.
5. Click **Save** to create the impact or **Cancel** to cancel the impact.
6. Enter the required data (see [Region Level Instructions](#) for details).
7. Click **Save** to save the impact or **Cancel** to cancel without saving.
8. For Region Level impacts/examples, use the “” icon to preview/edit the impact or the “” icon to preview the impact. Institution Level users can make edits to Region Level impacts/examples and those edits become visible to all users after they are saved.

### Note:


*You will see either the edit or the preview icon. The edit icon will only be visible if the impact is not associated with a plan that was submitted to the Federal Office. If the impact has been submitted, the preview icon will be visible.*

9. If needed, use the “” icon to hide Region or Institution Level impacts or examples from your view.

### Note:

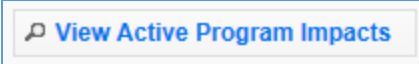
*The “” icon will only be visible if the impact has not been submitted; you cannot hide an impact if it has been submitted to the Federal Office.*

10. If you hide an example by mistake, click the **View Hidden Program Impacts** button.

 [View Hidden Program Impacts](#)

11. Click the “” icon to unhide the impact.

12. Click the **View Active Program Impacts** button to return to the list of active impacts.



### Add Program Impacts – Region Level

The Manage Program Impacts section collects the qualitative information (success stories) of the program.

1. Select **Manage Program Impacts** from the **WebNEERS Home page**.
2. Select **Program Impact** (individual level) from the dropdown.
3. Click **Save** to create the impact or **Cancel** to cancel the impact.
4. Enter a **Title** for the program impact (be specific).
5. Indicate the **Date Occurred**.
  - a. Type manually as MM/DD/YYYY or
  - b. Select the Calendar Icon (📅) and choose the correct date.
5. Leave checked, to submit, or uncheck to remove the program impact from the Institute level user's view.
6. Indicate the **Core Area(s)** of the impact.



*More than one **Core Area** can be selected.*

7. Indicate the **Secondary Area(s)** of the impact.



*More than one **Secondary Area** can be selected.*



*Additional Areas can be added by clicking "Add Focus" if the list does not provide an adequate description of the area on which the program impact reflects.*

8. Indicate the **Key Word(s)** that describe the program impact.



*Additional Key Words can be added by clicking "Add Keyword" if the list does not provide adequate options.*



9. Indicate the **People** who were involved in facilitating the program impact.



Note:

*More than one category of “**People**” can be selected.*



Note:

*Additional People can be added by clicking “Add People” if the list does not provide adequate options.*

10. Type the **Background** of the program impact.

*The background is to: Provide a brief narrative description of the circumstances prior to program involvement and the actions, activities or project milestones that took place during the program that led to the outcomes/impacts. Be clear who is telling the story and include quotation marks where appropriate. **Do not use names or personally identifiable information**. Include any external factors or assumptions that may have influenced the story. (2000 characters or less)*

11. Type the **Outcomes/Impacts**.

*The Outcomes/Impacts section is to: Provide a brief narrative description of the direct benefits or indirect/unintended consequences which occurred as a result of participation in the program. As above, be clear who is telling the story and include quotation marks where appropriate. **Do not use names or personally identifiable information**. The description should demonstrate the need for the program and should describe how participation affected those involved. It may reference benefits at the individual, community, or social level. (2000 characters or less)*

12. Select **Save** when the Program Impact has been added.



Note:

*WebNEERS does not “spell check” or “grammar check” – it is recommended that the user type the Background and Outcomes/Impacts into a word processor (such as Microsoft Word) prior to adding to WebNEERS to ensure the submission of a program impact that is complete, accurate, and reflects well upon the Region.*



Tip:

*Selecting accurate and appropriate Focus Areas, Key Words and People will allow Region and Institute level users to quickly find relevant Program Impacts. These items are all available as*

searchable terms on the Manage Program Impacts page and therefore can be used to quickly locate a relevant anecdote should a request from a stakeholder, partner or supervisor be received.

---

---

### *Review and Edit the Program Impacts*

---

---


1. Select **Manage Program Impacts** from the **WebNEERS Home page**.
2. Select the **Wrench icon** (  ) to the left of the **Program Impact** statement to be reviewed.
3. Review the information and make edits as needed:
  - i. Ensure the correct boxes have been selected for **Focus Areas, Key Words, and People**.
  - ii. Read the **Background** and **Outcomes/Impacts** sections for content and meaning. Ensure that the information is presented in a clear, concise and meaningful way, answering the questions being asked and providing the short and medium term outcomes expected in programming.
4. Select **Save** when the review and any necessary edits have been completed.  
*See screenshot below.*


Figure 6: Program Impact Data Entry Screen

### Program Impact

Title

Date Occurred

   
 Submit for Institute Use

#### Focus Areas

Please select which areas this program impact relates to. Select all that apply:

**Core Areas**

- Diet Quality
- Physical Activity
- Food Resource Management
- Food Safety
- Food Security

**Secondary Areas**

- Family/Interpersonal Relationships
- Management/Leadership
- Sectors of Influence
- Environmental Settings

[+ Add Focus](#)

#### Key Words

Select any of the following key words that apply to the program impact. Select all that apply:

- Disease Prevention
- Weight Management
- Personal Growth/Confidence
- Positive Impact on Family
- Improved Overall Health

[+ Add Keyword](#)

#### People

Select the people involved in the program impact story. Select all that apply:

**Staff**

- Paraprofessional
- Professional
- Volunteer
- Coordinator
- Partner/Collaborator

**Participant**

- Adult
- Pregnant Teen
- Youth

[+ Add Person](#)

#### Background

Provide a brief narrative description of the circumstances prior to program involvement and the actions, activities or project milestones that took place during the program that led to the outcomes/impacts. Be clear who is telling the story and include quotation marks where appropriate. Do not use names or personally identifiable information. Include any external factors or assumptions that may have influenced the story. (2000 characters or less)

#### Outcomes/Impacts

Provide a brief narrative description of the direct benefits or indirect/unintended consequences which occurred as a result of participation in the program. As above, be clear who is telling the story and include quotation marks where appropriate. Do not use names or personally identifiable information. The description should demonstrate the need for the program and should describe how participation affected those involved. It may reference benefits at the individual, community, or social level. (2000 characters or less)

## Manage Community Partnership Impacts

The **Manage Community Partnership Impacts** screen includes all Regional Level and Institution Level community level impacts. Regional impacts are only visible at the Institution Level if the “Submit for Institution Use” box is checked at the Regional Level (note, this box is checked by default). The **SEARCH** box can be used to quickly find examples by their title, type, submitter, keywords, people, focus, or date. Institution Level users can edit Regional impacts, if needed. Those changes will be visible to the Regional Level user.

SEARCH:



## WebNEERS Instructions

1. Log in as an Institution Level user.
2. Select “**Manage Community Partnership Impacts**” from the *WebNEERS Home Page*.
3. Click **Add Community Partnership Impact – Policy, Systems, and Environmental Change** to create an Institution Level impact.
4. Indicate the **Title of the Community Partnership Impact**.
  - a. An example title may be the name of the agency or the Policy, Systems or Environmental Change effort.
5. Identify the **Focus Area** of the Community Partnership Impact
  - a. Diet Quality
  - b. Physical Activity
  - c. Food Resource Management
  - d. Food Safety
  - e. Food Security
6. Select the **Congressional Districts**




*Select all congressional districts being impacted and/or affected by the community partnership impact.*

7. Identify the **Type** of the Community Partnership Impact
  - a. Environmental Settings
  - b. Sectors of Influence
8. Identify the **Participant Type** of the Community Partnership Impact
  - a. Adult
  - b. Youth
  - c. Pregnant Teen
9. Identify the **Term** of the Community Partnership Impact
  - a. Short
  - b. Medium
  - c. Long


10. Identify the **Stage** of the Community Partnership Impact
  - a. Planning
  - b. Maintenance
  - c. Evaluation
11. Identify the **Delivery Sites and Partnerships** of the Community Partnership Impact
  - a. Adult Education & Training Sites
  - b. Adult Rehabilitation Centers
  - c. Churches
  - d. Community Centers
  - e. Emergency Food Assistance Sites
  - f. Extension Offices
  - g. Farmers Markets
  - h. Food Stores
  - i. Head Start Sites
  - j. Health Care Sites
  - k. Libraries
  - l. Other Youth Education Sites
  - m. Public Housing
  - n. Schools
  - o. Shelters
  - p. SNAP Offices
  - q. WIC Program Sites
  - r. Worksites
12. Enter the **Narrative** of the Community Partnership Impact (5,000 characters or less)  
 Community partnership impacts describe work at the community level. Indicate the partners (i.e., non-profits, universities, private organizations or industry groups) involved in the community level success. Clearly state how the work of your program drove a community action, the potential or demonstrated benefit in EFNEP core areas, and how the work improved the lives of limited resource audiences. Quantitative examples are the most effective (e.g., pounds of food, servings of fruits and vegetables, dollars of food costs saved, dollars of health care costs saved, etc.) Tie the community partnership impact to EFNEP’s purpose (i.e., improved nutritional wellbeing, improved food and physical activity environments, and personal development of low-income populations) and USDA Strategic Goals (<https://www.usda.gov/our-agency/about-usda/strategic-goals>).
13. Click **Save** to save the impact or **Cancel** to cancel without saving.
14. For Region Level impacts/examples, use the “” icon to preview/edit the impact or the “” icon to preview the impact. Institution Level users can make edits to Region Level impacts/examples and those edits become visible to all users after they are saved.




*You will see either the edit or the preview icon. The edit icon will only be visible if the impact is not associated with a plan that was submitted to the Federal Office. If the impact has been submitted, the preview icon will be visible.*

15. If needed, use the “” icon to hide Region or Institution Level impacts or examples from your view.  
*See additional notes below.*



The “” icon will only be visible if the impact has not been submitted; you cannot hide an impact if it has been submitted to the Federal Office.

16. If you hide an example by mistake, click the **View Hidden Community Partnership Impact – Policy, Systems, and Environmental Change** button.

 [View Hidden Community Partnership Impact - Policy, Systems and Environmental Change](#)

17. Click the “” icon to unhide the impact.

18. Click the **View Community Partnership Impact – Policy, Systems, and Environmental Change** button to return to the list of active impacts.

 [View Community Partnership Impact - Policy, Systems and Environmental Change](#)

### Add Community Partnership Impacts – Region Level

The Manage Community Partnership Impacts section collects qualitative information (Policy, Systems, and Environmental Change efforts) of the program.

1. Select **Manage Program Impacts** from the *WebNEERS Home page*.
2. Select “**Manage Community Partnership Impacts**” from the *WebNEERS Home Page*.
3. Click **Add Community Partnership Impact – Policy, Systems, and Environmental Change** to create a Region Level impact.
4. Indicate the **Title of the Community Partnership Impact**.
  - a. An example title may be the name of the agency or the Policy, Systems or Environmental Change effort.
5. Identify the **Focus Area** of the Community Partnership Impact
  - a. Diet Quality
  - b. Physical Activity
  - c. Food Resource Management
  - d. Food Safety
  - e. Food Security
6. Select the Congressional Districts





Select all congressional districts being impacted and/or affected by the community partnership impact.

7. Identify the **Type** of the Community Partnership Impact
  - a. Environmental Settings
  - b. Sectors of Influence
  
8. Identify the **Participant Type** of the Community Partnership Impact
  - a. Adult
  - b. Youth
  - c. Pregnant Teen
  
9. Identify the **Term** of the Community Partnership Impact
  - a. Short
  - b. Medium
  - c. Long
  
10. Identify the **Stage** of the Community Partnership Impact
  - a. Planning
  - b. Maintenance
  - c. Evaluation
  
11. Identify the **Delivery Sites and Partnerships** of the Community Partnership Impact
  - a. Adult Education & Training Sites
  - b. Adult Rehabilitation Centers
  - c. Churches
  - d. Community Centers
  - e. Emergency Food Assistance Sites
  - f. Extension Offices
  - g. Farmers Markets
  - h. Food Stores
  - i. Head Start Sites
  - j. Health Care Sites
  - k. Libraries
  - l. Other Youth Education Sites
  - m. Public Housing
  - n. Schools
  - o. Shelters
  - p. SNAP Offices
  - q. WIC Program Sites
  - r. Worksites
  
12. Enter the **Narrative** of the Community Partnership Impact (5,000 characters or less)  
 Community partnership impacts describe work at the community level. Indicate the partners (i.e., non-profits, universities, private organizations or industry groups) involved in the community level success. Clearly state how the work of your program drove a community action, the potential or demonstrated benefit in EFNEP core areas, and how the work improved the lives of limited resource audiences. Quantitative examples are the most effective (e.g., pounds of food, servings of fruits and vegetables, dollars of food costs saved, dollars of health

care costs saved, etc.) Tie the community partnership impact to EFNEP’s purpose (i.e., improved nutritional wellbeing, improved food and physical activity environments, and personal development of low-income populations) and USDA Strategic Goals (<https://www.usda.gov/our-agency/about-usda/strategic-goals>).

13. Click **Save** to save the impact or **Cancel** to cancel without saving.

14. For Region Level impacts/examples, use the “” icon to preview/edit the impact or the “” icon to preview the impact.


*See additional notes below.*



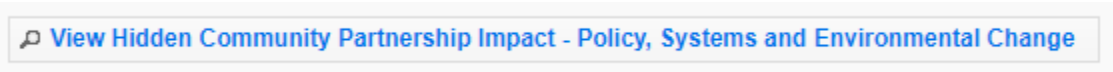
*You will see either the edit or the preview icon. The edit icon will only be visible if the impact is not associated with a plan that was submitted to the Federal Office. If the impact has been submitted, the preview icon will be visible.*

15. If needed, use the “” icon to hide Region Level impacts or examples from your view.



*The “” icon will only be visible if the impact has not been submitted; you cannot hide an impact if it has been submitted to the Federal Office.*

16. If you hide an example by mistake, click the **View Hidden Community Partnership Impact – Policy, Systems, and Environmental Change** button.



17. Click the “” icon to unhide the impact.

18. Click the **View Community Partnership Impact – Policy, Systems, and Environmental Change** button to return to the list of active impacts.



*See screenshot below.*



Figure 6: Community Partnership Impact Data Entry Screen

**Community Partnership Impact - Policy, Systems and Environmental Change**

Title

**Focus Areas**

Please select which areas this program impact relates to. Select all that apply:

**Core Areas**

- Diet Quality
- Physical Activity
- Food Resource Management
- Food Safety
- Food Security

**Congressional Districts**

Please select the congressional districts involved in the community partnership impact. Select all that apply:

- 1
- 1
- 2
- 3
- 4
- 5

**Type**

- Environmental Settings
- Sectors of Influence

**Participant Type**

- Adult
- Youth
- Pregnant Teen

**Term**

- Short
- Medium
- Long

**Stage**

- Planning
- Maintenance
- Evaluation

**Delivery Sites and Partnerships**

- Adult Education & Training Sites
- Adult Rehabilitation Centers
- Churches
- Community Centers
- Emergency Food Assistance Sites
- Extension Offices
- Farmers Markets
- Food Stores
- Head Start Sites
- Health Care Sites
- Libraries
- Other Youth Education Sites
- Public Housing
- Schools
- Shelters
- SNAP Offices
- WIC Program Sites
- Worksites

**Narrative**

Narrative Description (5000 characters or less)

**B** *I* U ABC | ↺ ↻ | 🗑️ | ☰ ☰

Cancel Save

# Appendix 1 – Environmental Settings Indicators

## Short Term Indicators

Short Term Indicators					
Organizations and Communities gain awareness, knowledge, and/or interest.					
	Diet Quality	Physical Activity	Food Resource Management	Food Safety	Food Security
Hold discussions to identify challenges and opportunities for low-income populations that can be addressed from a community context.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commit to collaborate to address identified needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conduct needs assessment to determine the extent of concern and potential for resolution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form partnerships or coalitions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Medium Term Indicators

Medium Term Indicators	
Organizations and Communities commit to change.	
<span style="border: 2px solid black; padding: 2px;">DIET QUALITY</span> <span style="padding: 2px;">PHYSICAL ACTIVITY</span> <span style="padding: 2px;">FOOD RESOURCE MANAGEMENT</span> <span style="padding: 2px;">FOOD SAFETY</span> <span style="padding: 2px;">FOOD SECURITY</span>	
<input type="checkbox"/>	Partnership/Coalition adopts a written plan that contains specific objectives and action steps for diet quality.
<input type="checkbox"/>	Facilitate the use of more nutritious foods at organization and community events and programs, such as food fairs and public meetings.
<input type="checkbox"/>	Expand nutrition education opportunities through schools, community education programs, and electronic media.
<input type="checkbox"/>	Implement consistent messaging and/or local branding.
<input type="checkbox"/>	Increase nutrition education referrals across programs and agencies.
<input type="checkbox"/>	Develop access to Community Supported Agriculture shares.
<input type="checkbox"/>	Reduce disparities in policies that encourage healthy eating.
<input type="checkbox"/>	Change policies, practices, and physical environment of an organization (e.g., a workplace, health care setting, school/daycare, faith organization, restaurant, or other public eating site to support and improve the quality of foods offered.
<input type="button" value="➕ Add Other"/>	

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	Partnership/Coalition adopts a written plan that contains specific objectives and action steps for physical activity.			
<input type="checkbox"/>	Expand opportunities for increased physical activity through planned organizational and community games, sports, programs, and competitions. <a href="#">(?)</a>			
<input type="checkbox"/>	Organize and implement neighborhood/community walking programs, gardens, etc.			
<input type="checkbox"/>	Reduce disparities to access and use of community sports and other physical activity programs.			
<input type="checkbox"/>	Change policies, practices, and/or physical environment of organizations and community settings (e.g. worksites, schools/daycares, city planning of businesses, neighborhoods, etc.) to increase daily physical activity.			
<a href="#">+ Add Other</a>				

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	Partnership/Coalition adopts a written plan that contains specific objectives and action steps for food resource management.			
<input type="checkbox"/>	Establish grocery stores, farmers markets, and neighborhood/community gardens in low-income neighborhoods.			
<input type="checkbox"/>	Increase food resource management education through schools, faith organizations, worksites, community centers, and other public places. <a href="#">(?)</a>			
<input type="checkbox"/>	Change policies, practices, and/or physical environments of organizations (e.g. schools, community centers, faith organizations, and other public sites) to encourage family and community food production, preparation, and storage.			
<a href="#">+ Add Other</a>				

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	Partnership/Coalition adopts a written plan that contains specific objectives and action steps for food safety.			
<input type="checkbox"/>	Establish a monitoring, evaluation, and prevention system based on a systematic preventative approach (such as HACCP) to improve food safety education for organizations and community partners that serve low-income individuals, families, and/or households.			
<input type="checkbox"/>	Conduct an audience appropriate social marketing campaign on family and community food safety in low-income communities.			
<a href="#">+ Add Other</a>				

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	Partnership/Coalition adopts a written plan that contains specific objectives and action steps for food security.			
<input type="checkbox"/>	Increase donations of food, money, or volunteer time by people in the community to emergency food programs.			
<input type="checkbox"/>	Increase quantity and quality of foods in emergency food programs.			
<input type="checkbox"/>	Increase visibility and access to non-emergency food assistance programs.			
<input type="checkbox"/>	Monitor changes in household and community food security, and the conditions that impact food security (such as unemployment and housing costs) in order to implement targeted programs.			
<input type="checkbox"/>	Facilitate increased support and involvement in community anti-hunger programs.			
<a href="#">+ Add Other</a>				

## Long Term Indicators

**Long Term Indicators**

Organizations and Communities experience improved conditions. A culture exists for resolving concerns and taking action at a multi-organization/community level.

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	Nutrient-dense foods are offered in schools, restaurants, grocery stores, farmers markets, worksites, food pantries, and other locations.			
<input type="checkbox"/>	Transportation infrastructures support access to grocery stores, farmers markets, food assistance offices, etc.			
<input type="checkbox"/>	School and worksite wellness policies have been developed and are implemented to provide healthier foods at school and worksite events, in vending machines, etc.			
<a href="#">+ Add Other</a>				

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	A family-friendly physical activity environment exists as a result of the revitalization of existing parks, trails, playgrounds, and other means.			
<input type="checkbox"/>	Policies supporting increased physical activity at schools, worksites, and other public buildings are in place and are followed. <a href="#">(?)</a>			
<input type="checkbox"/>	The community infrastructure includes safe walking paths, biking trails, and school routes, readily accessible bicycle racks, lighted stairwells, etc.			
<a href="#">+ Add Other</a>				

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	Food deserts have been reduced or eliminated.			
<input type="checkbox"/>	Nutritious and affordable foods are more readily available where food is purchased (corner stores, grocery stores, supermarkets, gas stations, etc.)			
<input type="checkbox"/>	Food preparation education is a component of school standard requirements.			
<input type="checkbox"/>	Community members have sufficient food and water supplies and the skills to prepare and use such supplies in the event of an emergency or disaster.			
<a href="#">+ Add Other</a>				

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	Food handling factors that negatively impact the safety of foods in a community (such as selling or distributing unsafe foods) have declined.			
<input type="checkbox"/>	Environmental factors that negatively affect the safety of foods in a community (such as contamination, residue, etc.) have declined.			
<input type="checkbox"/>	Foodborne illness outbreaks among low-income populations, especially those at increased risk, such as pregnant women and young children have declined.			
<a href="#">+ Add Other</a>				

DIET QUALITY

PHYSICAL ACTIVITY

FOOD RESOURCE MANAGEMENT

FOOD SAFETY

**FOOD SECURITY**

- Emergency and non-emergency food assistance programs are well known and used, as needed.
- Emergency and non-emergency food assistance programs have sufficient healthy food resources.
- Information is available on selecting and preparing foods provided through emergency and non-emergency food sources for a healthy and adequate diet.
- Emergency and non-emergency systems coordinate efforts to increase access and participation.

 [Add Other](#)

## Appendix 2 – Sectors of Influence Indicators

### Short Term Indicators

Short Term Indicators					
Sector representatives identify and define social structure and policy relevant issues.					
	Diet Quality	Physical Activity	Food Resource Management	Food Safety	Food Security
Participate in discussions with sector representatives regarding the potential impact of practices, structures, regulations, and policies on low-income audiences.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convene taskforces, expert committees, or advisory groups to determine the extent of concern and potential for resolution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commit to collaborate and communicate within and across sectors to address identified needs and determine respective roles of responsibility.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Medium Term Indicators

Medium Term Indicators	
Sector representatives influence action.	
<b>DIET QUALITY</b>	PHYSICAL ACTIVITY    FOOD RESOURCE MANAGEMENT    FOOD SAFETY    FOOD SECURITY
<input type="checkbox"/>	Adopt an informed written plan that contains specific objectives and action steps for diet quality.
<input type="checkbox"/>	Establish local or statewide food policy councils to inform key decision makers and to facilitate change across sectors of influence.
<input type="checkbox"/>	Conduct social marketing campaigns that promote healthy eating environments.
<input type="checkbox"/>	Communicate the respective actions taken by sectors of influence to improve diet quality and the public's response.
<input type="checkbox"/>	Make healthier food options more available and accessible to low-income populations.
<input type="checkbox"/>	Bring affordable grocery stores, farmers markets, etc. to low-income neighborhoods.
<input type="checkbox"/>	Provide healthier food options at schools, daycares, worksites, universities, hospitals, faith organizations, social events, etc. <a href="#">(?)</a>
<input type="checkbox"/>	Adapt national initiatives to state and local situations.
<a href="#">+ Add Other</a>	

DIET QUALITY	<b>PHYSICAL ACTIVITY</b>	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	Adopt an informed written plan that contains specific objectives and action steps for physical activity.			
<input type="checkbox"/>	Adopt statewide policies for providing physical activity education in schools and daycares.			
<input type="checkbox"/>	Conduct social marketing campaigns that promote environments that support physical activity.			
<input type="checkbox"/>	Communicate the respective actions taken by sectors of influence to improve physical activity and the public's response.			
<input type="checkbox"/>	Work together to increase safe and affordable facilities for walking and bicycling, such as sidewalks, greenways, bike lanes, etc. that are accessible to low-income populations/neighborhoods.			
<input type="checkbox"/>	Adapt national initiatives to state and local situations.			
<a href="#">+ Add Other</a>				

DIET QUALITY	PHYSICAL ACTIVITY	<b>FOOD RESOURCE MANAGEMENT</b>	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>		Adopt an informed written plan that contains specific objectives and action steps for food resource management.		
<input type="checkbox"/>		Use local or statewide food policy councils to inform key decision makers and to facilitate change across sectors of influence.		
<input type="checkbox"/>		Work together to improve food availability and food handling practices (purchasing, preparation, storage, etc.) <a href="#">(?)</a>		
<input type="checkbox"/>		Develop social marketing campaigns that promote more resilient families and communities.		
<input type="checkbox"/>		Communicate the respective actions taken by sectors of influence to improve food resource management and the public's response.		
<input type="checkbox"/>		Adapt national initiatives to state and local situations.		
<a href="#">+ Add Other</a>				



<b>DIET QUALITY</b>	<b>PHYSICAL ACTIVITY</b>	<b>FOOD RESOURCE MANAGEMENT</b>	<b>FOOD SAFETY</b>	<b>FOOD SECURITY</b>
---------------------	--------------------------	---------------------------------	--------------------	----------------------

<input type="checkbox"/>	Adopt an informed written plan that contains specific objectives and action steps for food safety.
<input type="checkbox"/>	Facilitate safer food practices by patrons and food handlers wherever food is offered.
<input type="checkbox"/>	Develop social marketing campaigns that promote safer food handling environments.
<input type="checkbox"/>	Communicate the respective actions taken by sectors of influence to improve food security and the public's response.
<input type="checkbox"/>	Reinforce safer food handling at schools, daycares, worksites, universities, hospitals, faith organizations, social events, etc.
<input type="checkbox"/>	Develop practices and policies to ensure safe food handling in local food service and temporary food service offerings (i.e. church dinners, fairs, etc.)
<input type="checkbox"/>	Adapt national initiatives to state and local situations.

[+ Add Other](#)

<b>DIET QUALITY</b>	<b>PHYSICAL ACTIVITY</b>	<b>FOOD RESOURCE MANAGEMENT</b>	<b>FOOD SAFETY</b>	<b>FOOD SECURITY</b>
---------------------	--------------------------	---------------------------------	--------------------	----------------------

<input type="checkbox"/>	Adopt an informed written plan that contains specific objectives and action steps for food security.
<input type="checkbox"/>	Coordinate among emergency and non-emergency food assistance agencies and anti-hunger organizations, and with other sectors to improve program access and participation.
<input type="checkbox"/>	Facilitate the availability of resources to efficiently and effectively support food security needs.
<input type="checkbox"/>	Adapt national initiatives to state and local situations.

[+ Add Other](#)

## Long Term Indicators

### Long Term Indicators

Conditions improve within and across states.

**DIET QUALITY**

PHYSICAL ACTIVITY

FOOD RESOURCE MANAGEMENT

FOOD SAFETY

FOOD SECURITY

- Adequate age-appropriate food and nutrition education is available for all students K-12, statewide.
- State-sponsored events reflect a shift to offering more of nutrient-dense foods.
- Nutrient-dense foods are more readily available statewide where food is purchased/served.
- Smaller portions and lower-calories options are more readily available statewide where food is purchased/served.

+ Add Other

DIET QUALITY

**PHYSICAL ACTIVITY**

FOOD RESOURCE MANAGEMENT

FOOD SAFETY

FOOD SECURITY

- Adequate physical activity education is available to all students, K-12, statewide.
- Physical activity options for low-income populations are inviting, safe, and readily available, and are reinforced through zoning and land-use policies and practices.
- Non-motorized transit is supported through transportation policies and infrastructure development.

+ Add Other

DIET QUALITY

PHYSICAL ACTIVITY

**FOOD RESOURCE MANAGEMENT**

FOOD SAFETY

FOOD SECURITY

- Fruit and vegetable stands, farmers markets, etc. more readily available statewide in low-income areas through incentives, zoning, taxation and other policies and practices.
- Food deserts are reduced or eliminated through taxation and other incentives, zoning and land-use policies, etc.
- Food resource management education is broadly available through schools and adult learning programs.

+ Add Other

DIET QUALITY

PHYSICAL ACTIVITY

FOOD RESOURCE MANAGEMENT

**FOOD SAFETY**

FOOD SECURITY

- Public venues such as festivals and fairs use safe food handling practices.
- Food safety certification in food service establishments is more universally implemented.
- Hand washing facilities and hand sanitizers are more readily available and accessed wherever food is served.

+ Add Other

DIET QUALITY

PHYSICAL ACTIVITY

FOOD RESOURCE MANAGEMENT

FOOD SAFETY

**FOOD SECURITY**

- Coordination exists across food assistance programs for increased access and participation.
- Healthier foods are provided at food pantries and soup kitchens statewide.

+ Add Other

## Appendix 3 – Clarifications of Plan Items

### Selecting Indicators for Environmental Settings and Sectors of Influence

1. SELECT APPROPRIATE INDICATORS – “Checking” an indicator in WebNEERS is a judgement call. You should consider the context of your situation. Is the work a significant change or moving in a new direction? Is it expanding the scope or gaining traction toward a larger change? Is it representative of what is happening as a result of what the university or state/territory is doing – EFNEP and others working together? If so, then you should check off the related indicator. Overall, the intent is to show the work being done to support the greater good, not simply to check off as many items as you can.
2. RECOGNIZE WORK ISN'T DONE IN ISOLATION – Indicators for Environmental Settings and Sectors of Influence should not be work of a specific person or one group. Do not record results from the work of EFNEP alone, but from the combined efforts of EFNEP and others. This means items in this section may be reported to multiple stakeholders. The important thing is to consider whether EFNEP’s voice is at the table in the actions that are taken and in the changes that are observed. If so, report it.
3. PARAPROFESSIONALS SHOULD FOCUS ON DIRECT EDUCATION – As mentioned at the National EFNEP Conference, EFNEP educators should continue to focus on direct education. The direct education is what gives EFNEP strength. It is the core of what we do, and legislatively, it is KEY to what makes our program distinct. If we lose it, we lose EFNEP.
4. ASSURE STAFF THAT THEIR WORK IS CRITICALLY IMPORTANT – Please make sure your staff know that the work that they do with families and youth is important and valued. Policy System and Environmental Change (PSE) work may have the potential to reach more people, but at this point, the true impact has not been confirmed. We want to build PSE work into what we do, but we do not want to dilute EFNEP. We need to make sure our educators understand the significance of what they do. As the research base and the definitions of PSEs evolve, we will continue to explore how best to reflect PSE changes within EFNEP. We are beginning with the role of professionals with respect to PSE.