



National Institute of Food and Agriculture  
[www.nifa.usda.gov](http://www.nifa.usda.gov)

# Plan of Work 101

## Training for State Users



INVESTING IN SCIENCE | SECURING OUR FUTURE



# Topics

**Part 1:** Background, Due Dates, & Policies

**Part 2:** How to Navigate the POW Software & Associated Systems

**Part 3:** Content Guidance for Plans and Annual Reports

**Part 4:** National Outcomes & Indicators

**Part 5:** The 5 Most Frequently Asked Questions



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# Background, Due Dates, & Policies

## PART 1





# AREERA Act & 2008 Farm Bill

## *Agricultural Research, Extension, and Education Reform Act of 1998* **(AREERA)**

Requires that states submit Plans of Work (POWs) in order to receive federal funding under the Smith-Lever Act, the Hatch Act, and the National Agricultural Research, Extension, and Teaching Policy Act of 1977.

These acts are the funding authorities for Extension and Research activities.

The AREERA POWs pertain only to the Hatch, Smith-Lever 3(b)&(c), Evans-Allen, and 1890 Extension funds.

## ***2008 Farm Bill (H.R. 6124)***

Contains a provision which states in Section 7505 that “The Secretary shall work with university partners in extension and research to review and identify measures to streamline the submission, reporting under, and implementation of plan of work requirements...”



# Plan of Work Software

- No paper!
  - Electronic submission & approval system began in 2006.
- Designed as an “update” system to accommodate a rolling 5 year POW reporting cycle.
  - Information carries over from year to year, and states must only “fill-in-the-blanks” for the added “update” year.
- States can modify any of the carried over information as well.
- NIFA continually modifies and improves the software.
  - User input, Farm Bill requirements, POW Panel of Experts, etc.



# Roles in the Software

State Users can have one of three roles in the software:

1. Director
2. Contact
3. State Contributor

\*All roles can input and save data.

\*Only Directors have authority to submit.

\*State Coordinators do not get auto emails generated by the POW system.



# Rolling 5-Year Reporting Cycle

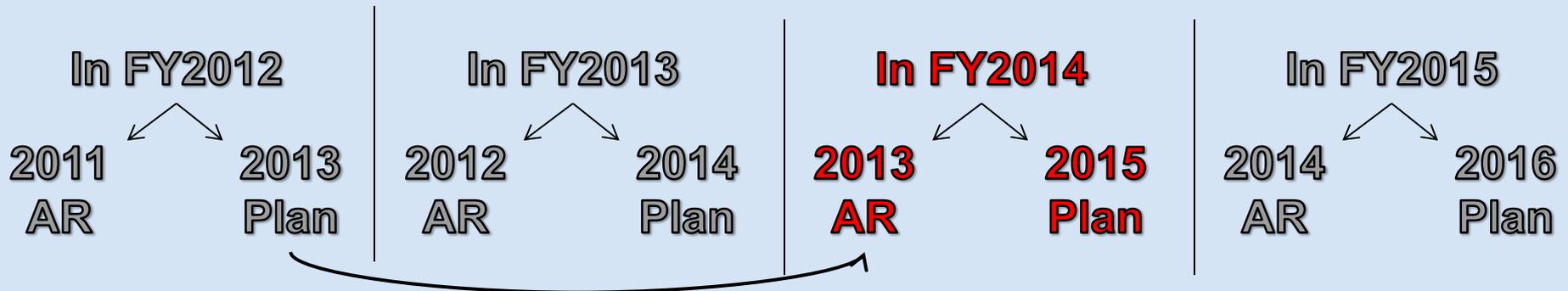
- States submit a POW “update” each year; this adds on an additional year of approval to spend funds from what was approved the previous year.
- In each yearly submission of an updated POW, the year on the front end drops off and a year on the back end is added.
  - Example:
    - In the current FY14, you are operating under your FY2014-2018 POW. You will soon be submitting your 2015-2019 POW for approval, meaning that the FY14 data has dropped out of the POW, and blank spaces for 2019 data have been added. When FY2015 begins, you will then have a 5 year plan still in place because you’ve added data for 2019.
- All other sections of the POW – text boxes for overviews, explanations, planned programs, etc. – can be modified yearly as well.

*NIFA encourages editing based on your NIFA Liaison’s review from the previous year!*



# Rolling Cycle – How it Works

In a given year, Annual Reports are submitted relating to the previous year, and Plans are submitted relating to the following year. The red years below indicate the current fiscal year and what is due from the states.



*NOTE: There is always a two year period between submitting any plan and then submitting the Annual Report of the same FY (e.g. the FY13 POW and FY13 AR are submitted two years apart, as indicated by the curved arrow above).*



# Due from the States in FY14

- 2015 – 2019 POW Update due April 1, 2013.
  - Referred as 2015 Plan or POW.
- 2013 Annual Report of Accomplishments & Results due April 1, 2013.
  - Referred to as 2013 Annual Report or AR.
- Some States may request and be granted extensions.
  - NIFA must receive a written request via email, sent to [pow@nifa.usda.gov](mailto:pow@nifa.usda.gov).



# Status-Driven Auto Emails

(Auto emails sent by the software to Directors & Contacts only)

Recipients	Description
P&A Administrator, Director, Contact, NIFA Liaison	Notification when Plan/Annual Report is available (released)
P&A Administrator, Director, and Contact NIFA Liaison	Notification when Plan/Annual Report is submitted Notification when Plan/Annual Report is submitted by State and ready for review
P&A Administrator	Notification when review is submitted (recommended for acceptance)
NIFA Liaison, OEP, Director, and Contact	Acceptance Notification (will include 2 attachments: Acceptance Memo and Review)
NIFA Liaison	Notification to NPL when Review is submitted
P&A Administrator and NIFA Liaison	Notification when NPL requests for Plan/Annual Report unsubmission
NIFA Liaison, Director, and Contact	Notification when Plan/Annual Report is unsubmitted
NIFA Liaison, OEP, Director, and Contact	Notification when Plan/Annual Report is unaccepted (the earlier acceptance would have sent out the pdf attachments)
P&A Administrator and NIFA Liaison	Notification when NPL requests for Plan unsubmission

# Time-Driven Notifications

Days to deadline (due date)	Recipients	Description
15	NIFA Liaisons	Notification to NIFA Liaison 15 days prior to review due date (If review is not yet submitted). If any one NPL has submitted the review then the notification should only be sent to the delinquent NPL.
30	Director and Contact	Notification to Director & Contact 30 days prior to plan due date (If Plan/Annual Report is not yet submitted)
30	NIFA Liaison	Notification to NIFA Liaison 30 days prior to review due date (If review is not yet submitted). If any one NPL has submitted the review then the notification will only be sent to the delinquent NPL.
7	Director and Contact	Notification to Director & Contact 7 days prior to Plan/Annual Report due date (If Plan/Annual Report is not yet submitted)
7	NIFA Liaison	Notification to NIFA Liaison 7 days prior to review due date (If review is not yet submitted). If any one NPL has submitted the review then the notification will only be sent to the delinquent NPL.
On the 7 <sup>th</sup> day after due date and thereafter every 14 days after due date (until status = submitted)	Director and Contact	Repeating notification: Notification to Director & Contact on the 7 <sup>th</sup> day after deadline and thereafter every 14 days (If plan is not yet submitted)
	NIFA Liaison	Notification to NIFA Liaison on review due date (If the review is not yet submitted) If any one NPL has submitted the review then the notification will only be sent to the delinquent NPL.



# What Happens after Submission?

- You will receive email confirmation.
- NIFA Liaison will be notified you've submitted; he/she can then start the reviews.
  - Reviews are due 60 Days from April 1 or from date of submission (whichever is later).
  - Early Reviews are encouraged; Liaison may contact you.
  - States receive email notification of review results w/attachments: approval letter and reviewer comments.



# What We Tell Your Reviewers:

- Focus should be on negotiating to achieve acceptability.
- Reviewers may, and should, communicate directly with designated state contacts if significant issues requiring more in-depth information are surfaced.
- Negotiation should occur early in the review process. Initial contact for more information should occur in the first 30 days.



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# How to Navigate the POW System & Associated Software

## PART 2



NIFA Reporting Portal - Windows Internet Explorer

https://portal.nifa.usda.gov/portal/front/login?service=http%3A%2F%2Fportal.nifa.usda.gov%2Fportal%2F

File Edit View Favorites Tools Help

NIFA Reporting Portal Your Lyris ListManager Home NIFA Intranet NIFA Plan of Work NIFA Plan of Work TEST AREERA Website Team Track

NIFA Reporting Portal

**NIFA** REPORTING PORTAL

Email Password Log In

- Register for the NIFA Leadership Management Dashboard (LMD)
- Reset password

**LMD**

The National Institute of Food and Agriculture (NIFA) created the Leadership Management Dashboard (LMD) to provide State Partners, Agency Executives, National Program Leaders, Program Specialists, and Program Assistants at NIFA with actionable business information in a format that is both intuitive and insightful. [More...](#)



**Latest News**

**Welcome to the NIFA Reporting Portal!**

New! Plan of Work (POW) is now accessible through the NIFA Reporting Portal.

NIFA Users: Please log in using your NIFA network credentials.  
Other Users: When you try to log in using your current LMD credentials, you will be prompted to reset your password.  
[More...](#)



[Edit Account](#) [Log Out](#)

## NIFA Reporting Portal

Welcome, Katelyn Sellers

### Welcome to the NIFA Reporting Portal!

New!! Plan of Work (POW) is now accessible through the NIFA Reporting Portal.

NIFA users: please log in using your NIFA network credentials.

Other users: when you try to log in using your current LMD credentials, you will be prompted to reset your password.

### Active Applications

[Plan of Work](#)

### Apply for Additional Applications

- [Leadership Management Dashboard - LMD](#)



## In “Edit Account” you have full access to edit:

1. Name
2. Email
3. Phone Number
4. Password

*You do not need to contact NIFA to change these!*

### NIFA Reporting Portal

Welcome, Katelyn Sellers

#### Katelyn Sellers

Name

Salutation \* First Name Middle Name \* Last Name Suffix

Contact

\* Email Address \* Phone Number

State

\* State

Application	Status	Organization
Plan of Work	active	SAES - UNIVERSITY OF DISTRICT OF COLUMBIA

Current Password \*

New Password

Minimum 6 characters Confirmation

or



## POW Home Screen:

Your home screen shows any active Plans and ARs to which you are assigned; links are shown in blue.

Here, you can choose to edit a Plan/AR or produce a PDF or Word document.

*Official: Shows only entered/chosen data.*

*Full Draft: Shows all screen options/check boxes.*



United States Department of Agriculture  
National Institute of Food and Agriculture

Plan  
of  
Work

Home
About POW
Contact Us
REEIS
Log Out
Back to Portal

The information entered into this system will be used to produce public documents. Do not enter anything of a sensitive or proprietary nature.

Welcome Katelyn Sellers.

Institution: University of the District of Columbia				
Annual Report Name	Modify	Official	Full Draft	Status
<b>2011 University of the District of Columbia Combined Research and Extension Annual Report of Accomplishments and Results</b>	Edit	pdf text docx	pdf text docx	New: Not Yet Submitted
Contact: Katelyn Sellers				
Director: Jane Doe				
Plan Name	Modify	Official	Full Draft	Status
<b>2013 University of the District of Columbia Combined Research and Extension Plan of Work</b>	Edit	pdf text docx	pdf text docx	New: Not Yet Submitted
Contact: Katelyn Sellers				
Director: Jane Doe				

2

[About POW](#)
[Privacy Policy](#)
[Paperwork Reduction Act](#)
[REEIS](#)
[Contact Us](#)

\*Requires Internet Explorer 6.0 or higher, Firefox 3.0.5 or higher.

The menu bar will always tell you where you are in green text.



Welcome Katelyn Sellers.

### I. Plan Overview

State: District of Columbia  
State Abbreviation: DC  
Institution Name: University of the District of Columbia

1. Enter a brief summary about your Plan of Work for fiscal year 2013-2017. Click "Save" to save changes.



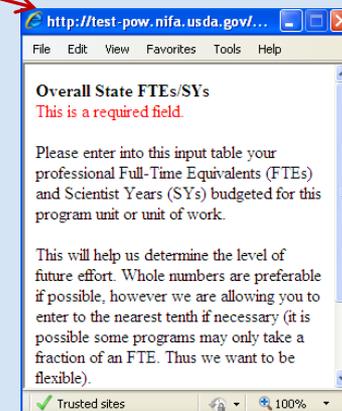
The help buttons are great tools for learning about specific data sections in the POW/AR.

2. Enter the estimated amount of professional FTEs/SYs to be budgeted for this plan.

Year:	Extension		Research	
	1862	1890	1862	1890
2012	31.8	0.0	3.5	0.0
2013	31.8	0.0	3.5	0.0
2014	31.8	0.0	3.5	0.0
2015	40.0	0.0	3.5	0.0
2016	40.0	0.0	3.5	0.0
	0.0	0.0	0.0	0.0

Save Cancel

You can navigate through screens by clicking "save" or by using links on the top menu bar.



# Example of Screen Navigation

1. Move to next screen via menu bar (no save)
2. Save and move to next screen.
3. Cancel will tell you the page was not saved.

Home | About POW | Contact Us | REIS | Log Out | Back to Portal

Plan Overview | Merit Review Process | Evaluation of Multis & Joint Activities | Stakeholder Input | Planned Programs

## II. Merit Review Process

1. Select the Merit Review Process that will be employed during the 5-Year Plan of Work cycle. (Check all that apply.)

- Internal University Panel
- External University Panel
- External Non-University Panel
- Combined Internal and External University Panel
- Combined Internal and External University and External Non-University Panel
- Expert Peer Review
- Other

2. Write your brief explanation here.

Each year the Director reviews the progress of each research project to ensure that researchers are accomplishing their objectives. Modifications were made to move in the direction of implementing research and integrated activities based on issues germane to an urban environment. The Peer Review has expanded to include not only representatives from the Department of Biological and Environmental Sciences, the Department of Chemistry, the Department of Physics, the Cooperative Extension Service, the Department of State, and local government, but also the Departments of Sociology, Urban Affairs, Criminology, Psychology, and the Water Resources Research Institute. The Peer Review criteria relate to:

- Knowledge base of the research
- Adequacy of procedures and experiment to meet the objectives

Entering or copying text into this text box of more than 3200 will be truncated to fit and the excess will be lost.

Save Cancel

Home | About POW | Contact Us | REIS | Log Out | Back to Portal

Plan Overview | Merit Review Process | Evaluation of Multis & Joint Activities | Stakeholder Input | Planned Programs

## III. Evaluation of Multis & Joint Activities

1. How will the planned programs address the critical issues of strategic importance, including those identified by the stakeholders?

DC residents have indicated that issues of high priority include health, nutrition, and youth violence. Also, many have expressed interest in safely growing their own fresh fruits and vegetables. Currently, we have planned programs that address these germane issues: Childhood Obesity, Global Food Security and

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Plan Overview | Merit Review Process | Evaluation of Multis & Joint Activities | Stakeholder Input | Planned Programs

## II. Merit Review Process

1. Select the Merit Review Process that will be employed during the 5-Year Plan of Work cycle. (Check all that apply.)

- Internal University Panel
- External University Panel
- External Non-University Panel

This page was not saved.

Save Cancel

# The Planned Programs (PP) Screen

## What can you do at this screen?

1. Add a new program.
2. Edit an existing program.
3. Delete a program.
4. Change order.
5. Generate documents of individual PPs.
6. Click done if no changes are needed.

The screenshot shows the 'Planned Programs' screen with a green header and a table of programs. Red circles and numbers 1 through 6 highlight specific features: 1. 'Add new program' link; 2. '1. Climate Change' program name; 3. 'Delete' button; 4. Up/down arrow icons; 5. Document download links (pdf, text, docx); 6. 'Done' button.

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Plan Overview | Merit Review Process | Evaluation of Multis & Joint Activities | Stakeholder Input | Planned Programs

View programs | Add new program

V. All Programs ?

Name of the Planned Program	Edit	Delete	Official	Full Draft
1. Climate Change	Edit	Delete	pdf text docx	pdf text docx
2. Global Food Security and Hunger	Edit	Delete	pdf text docx	pdf text docx
3. Health, Nutrition and Childhood Obesity Prevention	Edit	Delete	pdf text docx	pdf text docx
4. Urban Families, Youth, and Communities	Edit	Delete	pdf text docx	pdf text docx
5. Sustainable Energy	Edit	Delete	pdf text docx	pdf text docx
6. Food Safety	Edit	Delete	pdf text docx	pdf text docx

Please confirm that you entered all programs for this Plan by clicking the "Done" button.

Done

# Creating a New Planned Program

Home | About POW | Contact Us | REEIS | Log Out | Back to Portal

Plan Overview | Merit Review Process | Evaluation of Multis & Joint Activities | Stakeholder Input | Planned Programs

View programs | **Add new program**

### V.(A) Add Planned Program

**1. Enter the name of the Planned Program.** ?  
Please select a new Planned Program name using the radio buttons. No action is needed to keep the current name.

Childhood Obesity  Other

Entering or copying text into this text box of more than 100 characters will be truncated to fit and the excess will be lost.

**2. Enter brief summary about your Planned Program.** ?

Rich text editor toolbar: Search, Undo, Redo, Copy, Paste, Print, Bold, Italic, Underline, Strikethrough, Subscript, Superscript, Bulleted List, Numbered List, Table, Link, Unlink, Refresh.

Entering or copying text into this text box of more than 3200 will be truncated to fit and the excess will be lost.

**3. Number of years the Program has been in existence.** ?

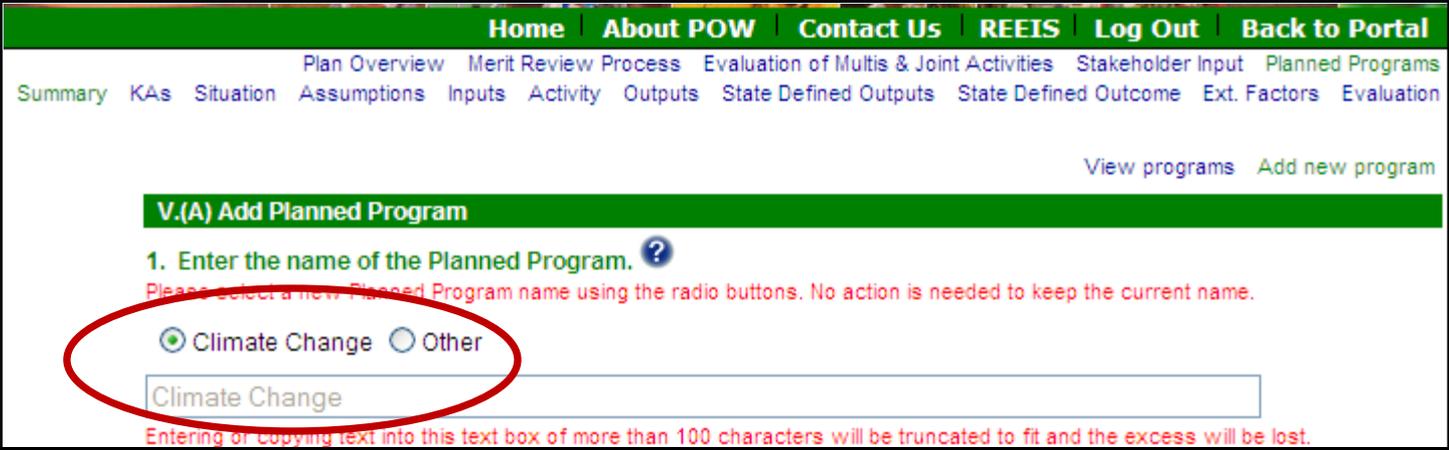
Note: Radio Buttons are automatically generated for the NIFA Priorities. Only those you haven't used in your current Plan/AR will show up on this screen.

Clicking the "other" radio button allows you to name your own PP.

# Editing an Existing Planned Program

## Changing the Program Name:

1. Current name will show in gray if it is a NIFA Priority – you must click “other” to change the name.
2. If it is already an “other” program, text will show in black, and you can edit the name as needed.



Home | About POW | Contact Us | REEIS | Log Out | Back to Portal

Plan Overview | Merit Review Process | Evaluation of Multis & Joint Activities | Stakeholder Input | Planned Programs

Summary | KAs | Situation | Assumptions | Inputs | Activity | Outputs | State Defined Outputs | State Defined Outcome | Ext. Factors | Evaluation

[View programs](#) [Add new program](#)

### V.(A) Add Planned Program

1. Enter the name of the Planned Program. 

Please select a new Planned Program name using the radio buttons. No action is needed to keep the current name.

Climate Change  Other

Climate Change

Entering or copying text into this text box of more than 100 characters will be truncated to fit and the excess will be lost.

*Any other section of the PP can be edited as needed, just as you would normally enter information for a brand new PP.*



When you are done entering/editing all your PPs, you can click “done” at the PP main screen.

**If you are a Contact or State Contributor:**

If there are any, you will get a list of any missing fields.

**If you are a Director:**

You will have the option to submit the Plan/AR. You will also get a list of missing fields.

Home | About POW | Contact Us | REEIS | Log Out | Back to Portal

Plan Overview | Merit Review Process | Evaluation of Multis & Joint Activities | Stakeholder Input | Planned Programs

View programs | Add new program

V. All Programs ?

Name of the Planned Program	Edit	Delete	Official	Full Draft	
1. Climate Change	Edit	Delete	pdf text docx	pdf text docx	↓
2. Global Food Security and Hunger	Edit	Delete	pdf text docx	pdf text docx	↑ ↓
3. Health, Nutrition and Childhood Obesity Prevention	Edit	Delete	pdf text docx	pdf text docx	↑ ↓
4. Urban Families, Youth, and Communities	Edit	Delete	pdf text docx	pdf text docx	↑ ↓
5. Sustainable Energy	Edit	Delete	pdf text docx	pdf text docx	↑ ↓
6. Food Safety	Edit	Delete	pdf text docx	pdf text docx	↑

Please confirm that you entered all programs for this Plan by clicking the "Done" button.

Done

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# Example of Missing Fields List:

[Home](#) | [About POW](#) | [Contact Us](#) | [REIS](#) | [Log Out](#) | [Back to Portal](#)

[Plan Overview](#) | [Merit Review Process](#) | [Evaluation of Multis & Joint Activities](#) | [Stakeholder Input](#) | [Planned Programs](#)

**Plan Of Work: 2013 University of the District of Columbia Combined Research and Extension Plan of Work**  
**State: District of Columbia**

**The following fields are missing or incomplete:**

- Planned Program: Childhood Obesity**
- Situation and Priorities of the Planned Program**
- Scope of the Planned Program**
- Assumptions for the Planned Program**
- Ultimate Goal of the Planned Program**
- Activity for the Program**
- Extension Education Methods**
- Target Audience Being Reached**
- State Defined Outcome**
- External Factors which may affect Outcomes**

***Only non-required fields will show on this list. You can still submit the Plan/AR if these fields are left blank.***

# Submitting a Plan/AR

Directors have two ways to submit:

- 1. After reviewing the final planned program, click the "done" button.
- 2. Click "submit" at your home screen.

Both options bring you to your submit screen as shown here.

6. Food Safety

Edit Delete pdf text docx pdf text docx ↑

Please confirm that you entered all programs for this Plan by clicking the "Done" button.

13

**Done**

Welcome Jane Doe.

**Institution: University of the District of Columbia**

**Annual Report Name**

**2011 University of the District of Columbia Combined Research and Extension Annual Report of Accomplishments and Results**

Submit

Contact: Katelyn Sellers

Director: Jane Doe

**Plan Name**

**2013 University of the District of Columbia Combined Research and Extension Plan of Work**

Submit

Contact: Katelyn Sellers

Director: Jane Doe

Home About POW Contact Us REEIS Log Out Back to Portal

Plan Overview Merit Review Process Evaluation of Multis & Joint Activities Stakeholder Input Planned Programs

**Plan Of Work: 2013 University of the District of Columbia Combined Research and Extension Plan of Work**

State: District of Columbia

Hi Jane Doe,

By clicking the Submit button, you are declaring your Plan of Work is completed. Are you sure you want to make your final submission?

By clicking this "Submit" button I hereby certify that the submission of this Plan of Work is approved by me.

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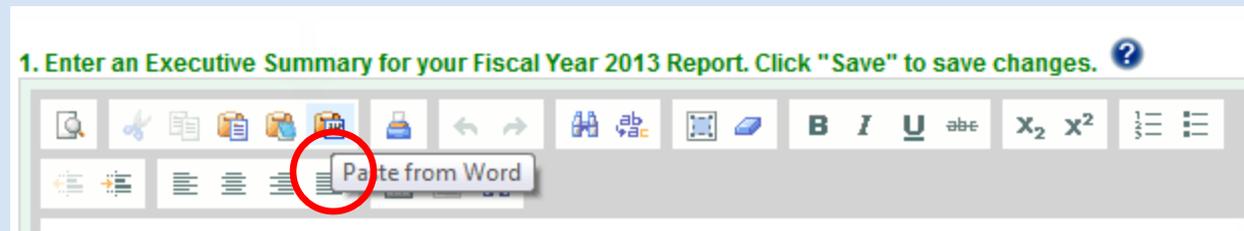
**Submit** **Cancel**

		Draft	
Edit	pdf text docx	pdf text docx	New: Not Yet Submitted

2

# Note about text boxes:

- You can copy and paste from Word documents directly into the software.
  - To do this, make sure to use the “paste from word” button in each of the text boxes. Here is a screenshot of the button:



- Software is designed to retain text formatting.



# Systems Associated with POW

- [REEIS - Research, Education & Economics Information System](#)
  - You can get PDFs of any accepted Plan/AR from any state here.
  - Also provides various financial reports and organizational data.
- **LMD – Leadership Management Dashboard**
  - You must register through the NIFA Reporting Portal.
  - Provides more detailed financial information and ability to filter/customize data.

# This is the REEIS home screen:

System 

Home | About | Snapshots | Trends | Reports & Documents | Rankings | Links | Help | Contact Us

You are here: Home

The Research, Education, and Economics Information System (REEIS) is a source of information on the research, education and extension programs, projects and activities of the U. S. Department of Agriculture (USDA) and its partner institutions in the following areas:

**REE**



More About REEIS...

**Search REEIS**

Go

**Browse by Subject**

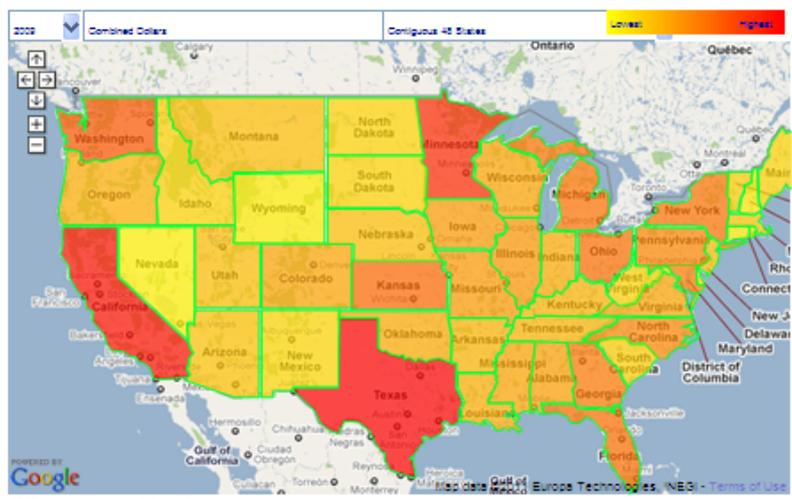
- Education
- Extension
- Research

**Dashboard**

- Leadership Management Dashboard

**What's New**

- Google Search
- CRIS 2009 Financial Summaries
- CRIS National and State Snapshots Heatmap
- AREERA 2011 Plans of Work
- AREERA 2009 Annual Reports
- More...



[Click here for Help on Heat Map](#)

**National and State Snapshots**

- State Snapshots
- Agency Projects
- AREERA Annual Report
- More...



**Trends**

- Projects
- More...



**Reports and Documents**

- AREERA Document Search FY 2007 to date
- AREERA Document Search FY 2000 to 2006
- CRIS Reports
- More...



**Rankings**

- Dollars Leveraged per Formula Grant Dollar
- Formula Grants by Region and State
- Formula Grants by Knowledge Area
- More...





# You can get PDFs of POWs & Annual Reports out of REEIS!

The screenshot shows the REEIS website interface. At the top, a navigation menu includes 'Home', 'About', 'Snapshots', 'Trends', 'Reports & Documents', 'Rankings', 'Links', 'Help', and 'Contact Us'. The 'Reports & Documents' menu item is circled in red. Below the navigation, a breadcrumb trail reads 'You are here: Home / Reports & Documents'. The main heading is 'Reports and Documents' in a dark red banner. Underneath, the 'AREERA' section features the NIFA logo and a text block: 'The Agricultural Research, Extension, and Education Reform Act of 1998 (AREERA) amended the Smith-Lever Act, the Hatch Act, and the National Agricultural Research, Extension, and Teaching Policy Act of 1977 (the funding authorities for Extension and Research activities) to require approved Plans of Work from Extension and Research in order to...'. To the right of this text is a 'Reports & Documents' sidebar with three items: 'AREERA Document Search FY 2007 to date', 'AREERA Document Search FY 2000 to 2006', and 'CRIS Reports'. The first two items are circled in red. A red arrow points from the first item to a 'Document Search' section below. This section has a blue header and contains the title 'AREERA Document Search FY 2007 to date'. It features a search form with 'State:' and 'Fiscal Year:' dropdown menus, both set to '<All>'. There are two checked checkboxes: 'Plans of Work' and 'Annual Reports'. A 'Submit' button is to the right of the form. Below the form is a paragraph of text explaining the AREERA Plan of Work (POW) and Annual Reports, and a link: 'To see POWs and Annual Report for years previous to FY 2007, please click here'. On the far right, a 'Quicklinks' sidebar lists 'AREERA Overview', 'AREERA Page on NIFA', and 'Search AREERA Annual Reports on Planned Programs:' with a search box and a 'Go' button. On the left side of the main page, there is a 'Search REEIS' box and a 'Browse by Subject' sidebar with categories like 'Education', 'Extension', and 'Research', and a 'Dashboard' section with 'Leadership Management Dashboard'.



To access LMD, register through the NIFA Portal:

The screenshot shows the NIFA Reporting Portal login page. The browser window title is "NIFA Reporting Portal - Windows Internet Explorer". The address bar shows the URL: <https://portal.nifa.usda.gov/portal/front/login?service=http%3A%2F%2Fportal.nifa.usda.gov>. The page features a navigation menu with "File", "Edit", "View", "Favorites", "Tools", and "Help". Below the menu is a "Favorites" section. The main content area has a header with the "NIFA REPORTING PORTAL" logo and a "Log In" button. The "Email" and "Password" input fields are circled in red. Below the login fields are links for "Register for the NIFA Leadership Management Dashboard (LMD)" and "Reset password". The main content area is divided into two columns: the left column contains the "LMD" title and a description of the Leadership Management Dashboard, and the right column contains a scenic image of a mountain landscape. Below the main content area is a "Latest News" section with a "Welcome to the NIFA Reporting Portal!" message and instructions for users.

**LMD**

The National Institute of Food and Agriculture (NIFA) created the Leadership Management Dashboard (LMD) to provide State Partners, Agency Executives, National Program Leaders, Program Specialists, and Program Assistants at NIFA with actionable business information in a format that is both intuitive and insightful. [More...](#)

**Latest News**

**Welcome to the NIFA Reporting Portal!**

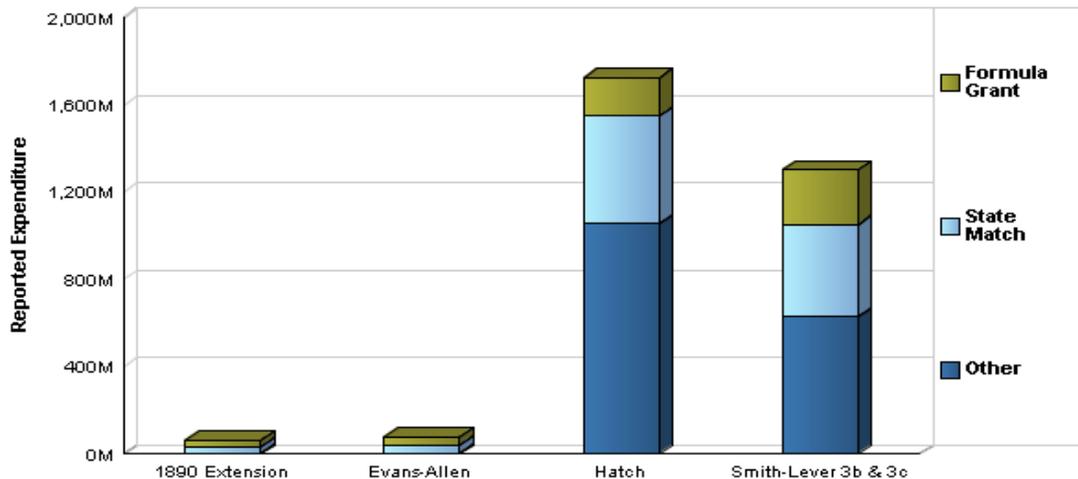
NIFA Users: Please log in using your NIFA network credentials.  
Other Users: When you try to log in using your current LMD credentials, you will be prompted to reset your password.  
[More...](#)



National Summary of Selected Formula Grants  
 by Institution Type and Funding Source

Fiscal Year:

Institution Type/Funding Source	Reported Expenditure			
	Formula Grant	State Match	Other	Total
<input checked="" type="checkbox"/> 1862	\$425,002,917	\$914,137,373	\$1,685,445,139	\$3,024,585,430
Hatch	\$174,659,158	\$492,586,709	\$1,055,925,508	\$1,723,171,375
Smith-Lever 3b & 3c	\$250,343,759	\$421,550,664	\$629,519,631	\$1,301,414,054
<input checked="" type="checkbox"/> 1890	\$70,754,778	\$62,880,429	\$10,870,899	\$144,506,106
Evans-Allen	\$38,387,888	\$34,893,675	\$5,735,802	\$79,017,365
1890 Extension	\$32,366,890	\$27,986,754	\$5,135,097	\$65,488,741
<b>Grand Total</b>	<b>\$495,757,695</b>	<b>\$977,017,802</b>	<b>\$1,696,316,038</b>	<b>\$3,169,091,536</b>



Reports on State Accomplishments for the Hatch, Smith-Lever 3b&c, Evans-Allen, and 1890 Extension Formula Grants

- National Summary of Selected Formula Grants by Institution Type and Funding Source
- Strategic Goal Perspective by Goal, Objective and Knowledge Area
- Geographic Perspective by Region, State and Institution Type
- Portfolio Perspective by Portfolio and Knowledge Area
- Knowledge Area Perspective by Topic, Category and Knowledge Area
- Funding Source Perspective by Funding Source and Activity Type
- Institution Report Perspective by Institution, Planned Program and Knowledge Area

Reported Outcomes on State Accomplishments for the Hatch, Smith-Lever 3b&c, Evans-Allen, and 1890 Extension Formula Grants

- Outcomes Search by Goal
- Outcomes Search by Portfolio
- Outcomes Search by KA

# On the “Analyze” page in LMD, you have the ability to create your own reports and charts.

The screenshot displays the 'Analyze' page in the Leadership Management Dashboard (LMD). The top navigation bar includes 'Activities', 'My Snapshots', 'State Snapshots', 'Awards', 'AREERA POW', 'Workload', 'Goals', 'Portfolios', 'Analyze', 'Definitions', and 'Contact Us'. The 'Analyze' tab is active, and sub-navigation options 'Compare', 'Filter', and 'Rank' are visible. The page title is 'Leadership Management Dashboard (Release 4.3) for Katelyn Sellers'. In the top right corner, the 'Help' button is circled in red. The main content area is titled 'Trend of NIFA Sponsored Projects by State' and includes a 'Search Saved Pages' button. Below this, the 'Data Source' is identified as 'Current Research Information System (CRIS)'. A descriptive paragraph explains the 'Filter' feature, and 'Keywords' are listed as 'NIFA Sponsored, Project Count, States'. Configuration options include 'Measure' (Project Count), 'Dimension for Rows' (State), and 'Dimension for Columns' (Year). The 'Filters' section shows 'Sponsoring Agency includes only' with a dropdown menu containing 'NIFA'. At the bottom, there are buttons for 'Create New Page' and 'Save as New Page'. A 'Default Page' box on the right indicates 'Share with public? false'.

*The “help” button provides videos of how to navigate LMD and search for specific criteria.*



# Content Guidance

## PART 3

1. Language & Writing Style
2. Writing Better Outcomes
3. “Not Reporting” on Programs



# Your NIFA Reviewers ask themselves:

- Is there evidence of expected future accomplishments in the Plan of Work?
  - Likewise, does the Annual Report contain well-written outcomes that explain how success was achieved; does it contain quantitative, measured results?
- Does what they expect to accomplish appear feasible?
- Does the Plan of Work Update address issues from your review last year?
- Are there any significant changes in the Plan from last year?
- Does the Annual Report sufficiently explain the **HOW** of:
  - The Merit Review Process?
  - Collection of Stakeholder input?
  - Evaluation Activities?



# Language & Writing Style

- Be direct and to the point - NIFA encourages brevity!
- Don't make language overly formal to the point of being obscure.
- Using the first person is okay.
- Using quotations to make a point is okay – Some states quote participants in studies as part of their outcome statements. (Quantifiable results are still desired, but anecdotal data can help support the quantitative outcome statement.)



# Writing Better Outcomes

- For detailed training on this, click [here](#).
- Make sure you are describing a clear and obvious progression between the “issue” “done” and “results” sections.
- In the *results* section: what positive changes in knowledge, conditions, or actions occurred?
- Include specific numbers that capture the positive changes.
  - percentage increases, dollars saved, dollars earned, value increases, etc.
- *If you identified changes in how you could better collect data to support more well-defined and measure outcomes, make sure to describe this in the “evaluation” section!*



# Example of Needing Improvement

Regarding an outcome statement in which it was described that students were taught a class on invasive species and then volunteered to remove invasive species from 32 acres of parkland:

“Although it is commendable that invasive species were removed from 32 acres of parkland, what issue does that address, and what benefit does that have for the parklands and environment? There is no connection between the issue, activity, and results. Will the people trained continue to use the information to change something in particular? Is invasive species a problem (economic in nature) in the current area? If the impact of this work on the environment could be reported, this would be a solid outcome statement.”



# Example of a Well-Written Outcome

*(Here, the issue is directly related to numbers given on economic impact.)*

During the past five years, Colorado wheat farmers have planted an average of 20% of their fields to newly released and improved wheat varieties. This is a faster adoption rate of improved wheat varieties than for growers from comparable states. The Colorado State University (CSU) Extension Wheat Improvement Work Team provides 18% of the total investment in developing and promoting CSU wheat varieties. Plantings of improved wheat varieties increased Colorado farmers' farm gate income by \$12,840,000 in 2008. Extension's share (18%) of this impact for the Colorado wheat industry is \$2,311,000, or about \$13.70 returned for each \$1.00 invested.

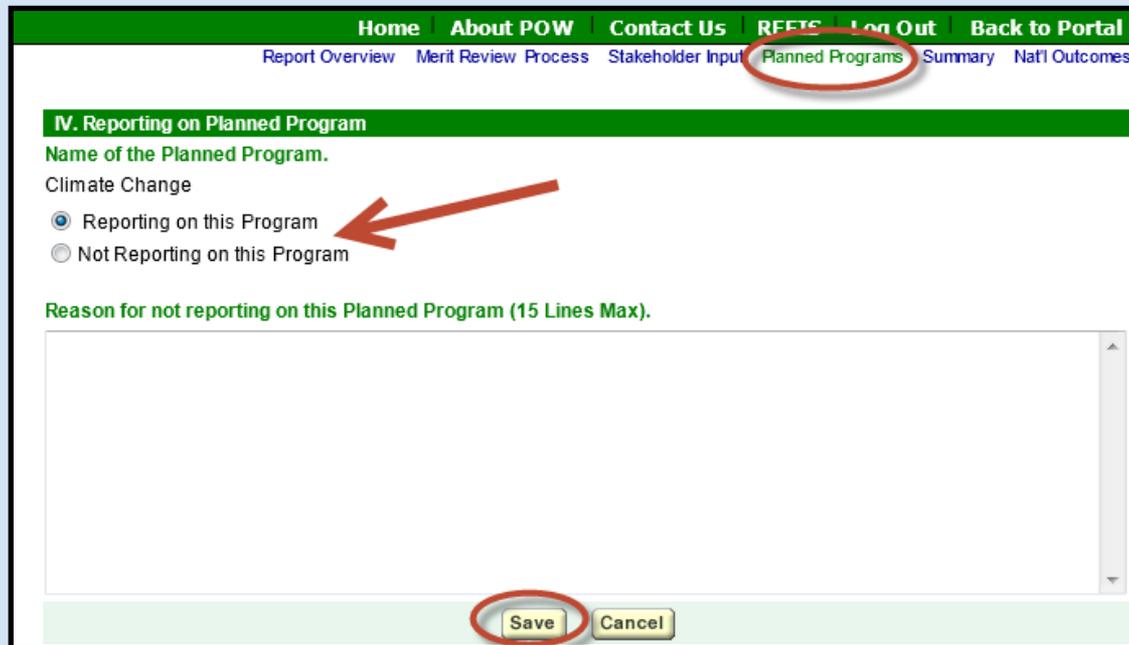
To learn more about writing outcomes, use this presentation listed on the AREERA web page:

[http://www.nifa.usda.gov/business/reporting/planrept/pdf/2012\\_writing\\_better\\_outcomes\\_web.pdf](http://www.nifa.usda.gov/business/reporting/planrept/pdf/2012_writing_better_outcomes_web.pdf)



# Not Reporting on this Program

“Not reporting” on a previously planned program and/or associated outcomes is allowable in the Annual Report!



Home | About POW | Contact Us | REETS | Log Out | Back to Portal

Report Overview | Merit Review Process | Stakeholder Input | **Planned Programs** | Summary | Nat'l Outcomes

**IV. Reporting on Planned Program**

**Name of the Planned Program.**  
Climate Change

Reporting on this Program  
 Not Reporting on this Program

**Reason for not reporting on this Planned Program (15 Lines Max).**

Save Cancel

Common reasons for use: Combining of programs, no longer performing work in the topic area, activities have moved under a different program, etc.

NOTE: Mandatory to give reason if choosing “Not reporting on this program.”



# Not Reporting on this Program

Report Overview Merit Review Process Stakeholder Input Planned Programs Summary Nat'l Outcomes  
Knowledge Areas Inputs Activity Outputs State Defined Outputs State Defined Outcomes Ext. Factors Evaluation

**IV (A): Planned Program (Knowledge Area) ?**

Name of the Planned Program.  
 Youth Development [Edit name](#)

Reporting on this Planned Program [Click here if not reporting on this Planned Program](#)

1. Enter the program Knowledge Area(s) (up to 20) and a percentage for each (total of each column must equal either 100% or 0%).

KA Code	Knowledge Area	% 1862 Extension	% 1890 Extension	% 1862 Research	% 1890 Research	
806	Youth Development	<input type="text" value="0"/>		<input type="text" value="0"/>		<a href="#">Delete</a>
Total		0	0	0	0	

[Add knowledge area](#)

Choice of “reporting” or “not reporting” can be changed in the KA section at any time without losing any data you’ve entered.



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# National Outcomes & Indicators

## Part 4





# Background on National Outcomes

- Each year, NIFA reports outcomes to USDA, the Office of Management and Budget (OMB) and Congress in our budget documents.
- OMB has stated they would like to see more national outcomes reported in our budget documents.
- Currently, we submit primarily single university outcomes as examples of evidence of past performance because that is what we get in our reporting systems (CRIS and Plan of Work).
- Including the national outcomes we receive through the Annual Report for the four formula grants will help OMB and Congress see the value of that funding.

## The 2010 Panel of Experts made the following statements:

*“The panelists believe that measureable outcomes can be developed so that the system can document the continuous need for...capacity building with the purpose of sustaining a vibrant food and agricultural infrastructure in a measurable way, and which can be communicated to stakeholders.”*

*“The panel supports an existing effort to develop national outcome indicators for the NIFA priority areas and other common national programming efforts for institutions to **voluntarily adopt.**”*



# Results

Report is published on the [AREERA Website](#).

Newsletter announcing the report availability was sent out to the POW email list on August 12, 2011.

Direct link:  
[National Outcomes & Indicators Report](#)

## National Outcomes and Indicators *AREERA Plan of Work Reporting System*

### Background

NIFA is required to report outcomes (“evidence of performance”) to USDA, the Office of Management and Budget (OMB) and Congress in its budget documents. Guidance has been received from USDA and OMB leadership that national outcomes which aggregate data across all states and territories are desired. Meanwhile, NIFA itself recognizes that impacts stated on a national scale help better tell the formula fund story and garner support for continued funding. Regarding the Plan of Work reporting system, in the past, NIFA has gleaned and reported primarily single university outcomes as examples of evidence of past performance because those are what the reporting system provides. A Panel of Experts was convened in May 2010 to identify improvements that could be made to the POW reporting system. As part of the overall charge, the Panel agreed that NIFA and select Land Grant University representatives would lead an initiative to develop National Outcomes and Indicators that would satisfy the need for NIFA to report nationally aggregated data. Ultimately, the ability of NIFA to report on nationally aggregated data on certain outcomes and indicators will help OMB and Congress see the continued value of the formula funding covered by the AREERA State Plan of Work system.

### Summary of this Document

This document contains outcomes grouped according to the five NIFA Priority Areas: Childhood Obesity, Climate Change, Food Safety, Global Food Security and Hunger, and Sustainable Energy. They are the result of a conference held in New Orleans, LA, on February 22-24, 2011. Attendees at the conference consisted of: 60 Land-Grant Participants (equal representation of Research and Extension; Evaluation Specialists; Professional Facilitators) and 10 NIFA National Program Leaders. Five groups were each charged with developing outcomes and associated indicators for their assigned NIFA Priority Area. Where applicable, definitions have been provided for the outcomes, and other information, such as potential associated KAs and other measurement guidance, have been listed within each area to help facilitate reporting.

In summary, this document contains the following:

- Childhood Obesity: 3 Outcomes (total of 23 associated Indicators)
- Climate Change: 3 Outcomes (total of 19 associated Indicators)
- Food Safety: 4 Outcomes (total of 19 associated Indicators)
- Global Food Security & Hunger: 4 Outcomes (total of 34 associated Indicators)
- Sustainable Energy: 7 Outcomes (total of 34 associated Indicators)



# National Outcomes & Indicators (NOIs)

NIFA provides **TWO** options for reporting NOIs:

1. Use tab provided in AR to access and submit via Google Forms.
2. Use Word Form provided via email from PARS and submit back via email to [pow@nifa.usda.gov](mailto:pow@nifa.usda.gov).



# National Outcomes & Indicators in the POW System:

The screenshot shows the POW System website interface. At the top, a green navigation bar contains links: Home, About POW, Contact Us, REEIS, Log Out, and Back to Portal. Below this, a secondary navigation bar lists: Report Overview, Merit Review Process, Stakeholder Input, Planned Programs, Summary, and Nat'l Outcomes (circled in red). A green banner below reads "Links to National Outcomes & Indicators GoogleForms". A list of categories is shown on the left: Childhood Obesity (with a red arrow pointing to a browser window), Climate Change, Food Safety, Global Food Security, and Sustainable Energy. The browser window displays a GoogleForm titled "Childhood Obesity National Outcomes & Indicators - FY2013". The form text states: "This form is a supplement to the 2012 Annual Report of Accomplishments and Results and is completely voluntary. Any state wishing to VOLUNTARILY report data for any of the Childhood Obesity Outcomes and Indicators should use this form."



# National Indicators Reporting

- Links not accessible after submitting AR.
  - Alternative: use links in email or contact POW Staff.
- You may submit multiple times for different data; you will not receive email confirmations.
  - Example: On Climate Change form, one submission for Indicator 1A but then another submission 5 days later for Indicator 3C.
- You may retract submissions but must request retraction via email ([pow@nifa.usda.gov](mailto:pow@nifa.usda.gov)).
  - List your institution and time of submission.



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# Top 5 Most Frequently Asked Questions

## Part 5





**Number One FAQ:** I just updated my Plan with new Planned Programs last year, so why aren't they showing up in my Annual Report this year?

- Remember that ARs are pre-populated by the software based off the POW of the same FY.
  - Example: The 2012 AR you see this year was generated from your 2012 POW, which you submitted in April 2011; it is going to have whatever PPs were in the Plan that you submitted in 2011.
  - If you submitted new PPs as part of your 2013 POW (submitted in April 2012), then those new PPs will not show up until your 2013 AR (which you'll be submitting in April 2014).
  - In the meantime, you can manually change the PPs in your AR by editing/renaming them and/or clicking "add previously unplanned program." You may also choose to use the new feature "not reporting on this planned program."



If you need to manually add/edit the PPs in your Annual Report to match up to what you changed in the POW the previous year, go to your home screen, and click the Annual Report you need to change.

The information entered into this system will be used to produce public documents.  
Do not enter anything of a sensitive or proprietary nature.

Welcome Katelyn Sellers.

**Institution: University of the District of Columbia**

Annual Report Name	Modify	Official	Full Draft	Status
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<b>2011 University of the District of Columbia Combined Research and Extension Annual Report of Accomplishments and Results</b>	Edit	pdf text docx	pdf text docx	New: Not Yet Submitted
---------------------------------------------------------------------------------------------------------------------------------	------	---------------	---------------	------------------------

Contact: Katelyn Sellers

Director: Jane Doe

Plan Name	Modify	Official	Full Draft	Status
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<b>2013 University of the District of Columbia Combined Research and Extension Plan of Work</b>	Edit	pdf text docx	pdf text docx	New: Not Yet Submitted
-------------------------------------------------------------------------------------------------	------	---------------	---------------	------------------------

Contact: Katelyn Sellers

Director: Jane Doe



Next, click on “Planned Programs” on your top menu bar.

Here, you can:

- 1. Rename/Edit PPs
- 2. Change order of PPs
- 3. Add previously unplanned PP

\*\*\*Note that you cannot delete previously PPs.

Home | About POW | Contact Us | REEIS | Log Out | **Back to Portal**

Report Overview | Merit Review Process | Stakeholder Input | **Planned Programs** | Summary

All Programs ?

Name of the Planned Program	Edit	Delete	Official	Full Draft	
1. Climate Change	Edit		pdf text docx	pdf text docx	↓
2. Global Food Security and Hunger	Edit		pdf text docx	pdf text docx	↑ ↓
3. Childhood Obesity	Edit		pdf text docx	pdf text docx	↑ ↓
4. Urban Families, Youth, and Communities	Edit		pdf text docx	pdf text docx	↑ ↓
5. Sustainable Energy	Edit		pdf text docx	pdf text docx	↑

**Add previously unplanned program**

Please confirm that you entered all programs for this Plan by clicking the "Done" button.

Done



## FAQ #2: How can I obtain and distribute copies of my institution's Plan and AR to colleagues?

- Use [REEIS](#) for obtaining a PDF of any Plan/AR that has already been accepted by NIFA.
- Use the POW system to get Word documents and PDFs.
  - Can access limited previous years' POWs/ARs.
  - Can generate the current version of your “new” 2013 POW or 2011 AR.



# You can get PDFs of POWs & Annual Reports out of REEIS!

The screenshot shows the REEIS website interface. At the top, a navigation menu includes 'Home', 'About', 'Snapshots', 'Trends', 'Reports & Documents', 'Rankings', 'Links', 'Help', and 'Contact Us'. The 'Reports & Documents' menu item is circled in red. Below the navigation, a breadcrumb trail reads 'You are here: Home / Reports & Documents'. The main heading is 'Reports and Documents' in a dark red banner. Underneath, the 'AREERA' section features the NIFA logo and a text block: 'The Agricultural Research, Extension, and Education Reform Act of 1998 (AREERA) amended the Smith-Lever Act, the Hatch Act, and the National Agricultural Research, Extension, and Teaching Policy Act of 1977 (the funding authorities for Extension and Research activities) to require approved Plans of Work from Extension and Research in order to...'. To the right of this text is a 'Reports & Documents' sidebar with three items: 'AREERA Document Search FY 2007 to date', 'AREERA Document Search FY 2000 to 2006', and 'CRIS Reports'. The first two items are circled in red. A red arrow points from the first item to a 'Document Search' section below. This section has a blue header and contains the title 'AREERA Document Search FY 2007 to date'. It features a search form with 'State:' and 'Fiscal Year:' dropdown menus, both set to '<All>'. There are two checked checkboxes: 'Plans of Work' and 'Annual Reports'. A 'Submit' button is to the right of these options. Below the form is a paragraph of text explaining the AREERA Plan of Work (POW) and Annual Reports, and a link to view documents from previous years. On the far left, a sidebar contains a 'Search REEIS' box and a 'Browse by Subject' menu with categories like 'Education', 'Extension', and 'Research'. On the far right, a 'Quicklinks' sidebar lists 'AREERA Overview', 'AREERA Page on NIFA', and 'Search AREERA Annual Reports on Planned Programs:' with a search box and 'Go' button.



## FAQ #3: We have new users joining our POW staff - Is there training for them to learn the ropes?

- NIFA's [AREERA Website](#) contains many resources for new users.
  - It is the most central location for anything having to do with the POW – links to other systems, documents, updates, newsletters, etc.
- POW Software Training Site
  - Useful to someone who wants to see the POW/AR step by step and to read all the “help” screens.
  - A new user can log into the training site but not necessarily have access to the Production site.
- Let the NIFA staff know of new folks and their contact information; we will add them to the POW software and email distribution lists.



## Here, you can:

- Read AREERA
- Get updates
- Read newsletters
- Access Training slides and other materials
- Get links to RWC website, REEIS, & LMD
- Get summary reports, and outcome statements.

**Search NIFA**

◦ [Search Help](#)

**Browse by Subject**

- [Agricultural Systems](#)
- [Animals](#)
- [Biotechnology & Genomics](#)
- [Economics & Community Development](#)
- [Education](#)
- [Environment & Natural Resources](#)
- [Family, Youth & Communities](#)
- [Food, Nutrition & Health](#)
- [International](#)
- [Pest Management](#)
- [Plants](#)
- [Technology & Engineering](#)

You are here: [Home](#) / [Grants](#) / [Planning and Reporting](#) / [State Plans of Work Annual Reports including AREERA](#)

## Grants

### AREERA State Plans of Work

The Agricultural Research, Extension, and Education Reform Act of 1998 (AREERA) requires that states submit Plans of Work (POWs) in order to receive federal funding under the Smith-Lever Act, the Hatch Act, and the National Agricultural Research, Extension, and Teaching Policy Act of 1977, which are the funding authorities for Extension and Research activities. The AREERA POWs pertain only to the Smith-Lever 3(b)&(c), Hatch, Evans-Allen, and 1890 Extension funds. Other funding authorities, such as the Smith-Lever 3(d), AFRI, and other grants and project funds, continue to require individual project/program proposals for their continued distribution of funds.

The NIFA Planning Accountability & Reporting Staff (PARS) distributes policy updates and provides guidance to Land Grant University (LGU) partners in the states concerning their annual submissions of Plans of Work and Annual Reports of Accomplishments and Results. The AREERA POW reporting system is developed and monitored by PARS, in conjunction with the Office of Information Technology (OIT). This system is used by all LGUs to input and edit data and officially submit their POWs and Annual Reports.

### News, Updates and Policy Documents

- [Final Draft of National Outcomes and Indicators](#)
- [POW Newsletters](#)
- [2010 POW Panel of Experts](#)
  - [Final Report & Recommendations](#)
  - [NIFA Response to Final Report & Recommendations](#)
- [POW Final Guidelines \(published in Federal Register, 2006\)](#)

### Training Tools and Information for Users

- [FY 2007-2011 Plan of Work \(POW\) Training](#)
- [FAQs](#)
- [Quick Guide for the 2012 Reporting Cycle](#)
- [Knowledge Area Classification Manual](#)
- [Crosswalk of NIFA KAs & Priorities](#)
- [Reporting Web Conferences](#)

### Summaries and Statistical Analyses

#### Annual Reports

- [2009 Report of State Accomplishments for Formula Grants](#)
- [2009 Annual Report Outcomes Spreadsheet](#)  
(This spreadsheet is comprehensive of all AR submissions from all states)
- [2008 Report of State Accomplishments for Formula Grants](#)

#### Plans of Work

- [2008 Plan of Work Summary Report](#)
- [2007 Plan of Work Summary Report](#)

Full access to previously submitted Plans of Work and Annual Reports can be found [here](#) for FY 2000-2006 and [here](#) for 2007-current.



## FAQ #4: We finished & submitted our Plan/AR but why are we still getting emails saying we're late?

- BOTH Directors must log in and click submit; submission is not complete until you've received an email confirming it and can see a submitted date under "status" at your home screen. If in doubt, contact [pow@nifa.usda.gov](mailto:pow@nifa.usda.gov), or call Katelyn Sellers at 202-401-5482.

Welcome Jane Doe.

Institution: University of the District of Columbia				
Annual Report Name	Modify	Official	Full Draft	Status
<b>2011 University of the District of Columbia Combined Research and Extension Annual Report of Accomplishments and Results</b>	Edit	pdf text docx	pdf text docx	New: Not Yet Submitted
Submit				
Contact: Katelyn Sellers				
Director: Jane Doe				
Plan Name	Modify	Official	Full Draft	Status
2013 University of the District of Columbia Combined Research and Extension Plan of Work	Submitted	pdf text docx	pdf text docx	Submitted on 10/12/2011



## FAQ #5: We submitted our Plan/AR but we made a mistake – Can we get it back?

- Yes, any Plan or AR can be unsubmitted and sent back to the state at any time.
- How do I unsubmit?
  - You must send an unsubmit request to NIFA at [pow@nifa.usda.gov](mailto:pow@nifa.usda.gov) (email asking for unsubmission)
  - Unsubmissions are typically done the same business day.



# Questions?

- Contact Katelyn Sellers, POW Business Manager in the Planning, Accountability & Reporting Staff at NIFA
  - [pow@nifa.usda.gov](mailto:pow@nifa.usda.gov)
  - [ksellers@nifa.usda.gov](mailto:ksellers@nifa.usda.gov)
  - 202-401-5482